IPSOS INDIA KNOWLEDGE REVIEW 2022

INCLUSIVITY

Our Latest Thinking on People, Markets and Culture.

GAME CHANGERS

Ipsos

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INCLUSIVITY

From the CEO's Desk

The world is emerging from its worst pandemic of Covid-19, which transcended geographies and left a lot of negative effects in terms of affliction and collateral impact on global markets, heightening the issues of unemployment, social inequality, inflation, among others. The pandemic also made us reassess our priorities, shifting focus on family, close bonding and being empathetic to one another. Notably, the pandemic was an equalizer. It equally impacted all demographics and melted the divide at a human level, though the rich stayed rich and the poor got poorer. It dawned on people that money could not save lives, leading to much anxiety and helplessness among people during the pandemic and the striking realization that we are all in it together. With rising inequality and growing schisms, the spotlight is around inclusion and diversity. Inclusion, in particular, in workplace, society, brand communication, relevance, engagement and in so many other ways.

Recently, Prime Minister Narendra Modi said, "I believe growth should be constant, sustained and inclusive. It's only meaningful if these three things are there. Otherwise they're just economic figures."

This echoes what is now becoming commonplace - hearing more about Inclusion in various spheres of work, society, community and so on. Disruption has been good in accentuating inclusiveness with the emphatic message: Nobody should be left out.

Keeping in view the renewed emphasis on Inclusion, we decided to dedicate a series of thought pieces to Inclusion and that formed the genesis of our special compilation on Inclusion. A tome to Inclusion in the form of Ipsos India Knowledge Review (IIKR) 2022, our second edition. Our local and global experts have delved much deeper into the topic and provided interesting views in the application of inclusiveness straddling different areas.

Do you know inclusiveness makes brands, workplaces, societies more positive, holistic, and even impacts brand decisions and choices of consumers?

Do read the insightful pieces and let me know your thoughts.

Amit

Amit Adarkar
CEO, Ipsos in India

Foreword

Governments and businesses around the world may have spent the last few years grappling with the coronavirus pandemic and its aftermath. But this has not dampened the efforts of organisations to better understand the people that matter to them, in all their diversity.

Indeed, in many ways, the 'call to action' has become more rather than less urgent lately. The health and economic crises prompted by the Covid experience have exacerbated existing inequalities and disparities across different groups in our society.
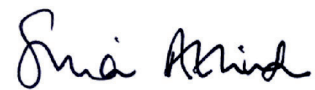
It raises a set of challenges which organisations around the world are starting to address. When we talk to the C-suite, 72% of Global Business Influencers tell us that they are actively measure and champion diversity and inclusion in their company these days. And there is a strong sense that positive steps can bring broader benefits, for example in boosting an employer brand: 96% of Ipsos' Reputation Council members agree that companies benefit from embracing diversity and inclusions.

But, as the articles in this collection show, these are complex, challenging and multi-faceted topics. In many countries, the data available on the profile of its population – by ethnicity, sexual orientation or religion for example – may be limited or out of date. Efforts to take short-cuts or to simplify and generalise are unlikely to take us forward and can be actively unhelpful. This is why we do need to spend time getting back to some first principles around what we are trying to measure, and what research design will be best suited to collect the information we need.

All of this comes at a time when people around the globe are often uneasy about the pace of the change they see around them. Some 83% of people tell us that "the world is changing too fast", and this can extend to how we feel about our own country: 74% of urban Indians say "I would like my country to be the way it used to be".

This collection of articles provides ideas and inspirations for all us, as we explore both what we know and what we don't know about how society is changing and where we can make a positive contribution.

Simon Atkinson
Chief Knowledge Officer, Ipsos Knowledge Centre

Why Inclusivity?

The Ipsos India Knowledge Review in its 2022 edition tackles the multidimensional and complex challenge of Inclusivity. Well into the second decade of this century, there are very few societies now where the need for Inclusivity has not been formally acknowledged. And yet there is possibly no country which can claim to have achieved its goals towards the same. Even the western countries, where these values have been overtly promoted for decades, have in the recent times witnessed conflicts and seen regressive policy changes. The challenges across societies differ by the cultural context and reflect the historical realities which have shaped the prevalent way of life.

Viewed from a business perspective, Inclusivity is not just a vision of fairness but a strategic commitment to creativity. Studies have shown that more diverse companies outperform the more uniformly profiled ones. According to Sundar Pichai, CEO- Google "A diverse mix of voices leads to better discussions, decisions, and outcomes for everyone." Creativity, in particular, requires multiple perspectives and diverse points of view.

This issue of IIKR reflects many such points of view. You can read about the challenges of Inclusivity in the work that we do – representing voice of consumers and the public and in reflecting market realities. While digital technology provides powerful tools for driving the changes that are needed, some of the challenges have to do with the scope definition itself. Do we as insights professional truly think of all segments when we chose to learn about consumers and gauge public opinion. There is a write up which shares important learnings from working with differently abled respondents. Other articles examine different aspects of inclusivity – gender, sexual orientation, race and age. In fact, we also make the argument that 'unstereotyping' is an important ask from brand communications.

While policy corrections and conscious action can help us advance the cause of Inclusivity, only a true appreciation of the value of empathy can drive mindset changes. The more we embrace the value of empathy the further we progress as a society – allowing us to actualize the potential of teams and individuals within organizations while ensuring wellbeing of all.

Our ability to reach unity in diversity will be the beauty and the test of our civilization

- Mahatma Gandhi

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CULTURAL DIVERSITY OF INDIA

THE INCLUSION IMPERATIVE: REPRESENTING THE VOICE OF INDIA

By Geeta Lobo

This article explains how the challenge of inclusivity comes up while representing the voice of stakeholders, be it consumers, voters, businesses, or specialist segments in India. It further talks about how true inclusion comes through a fair representation which requires recognizing the contextual, cultural and access realities of populations.

Representing the voice of stakeholders be it consumers, voters, businesses or specialist segments brings with it the challenge of designing for Inclusion. Without a fair representation of the underlying variation we cannot hope to fully access the truth about the population in question. The more varied the population the more challenging it is to assess its true character.

The challenge of inclusion is exemplified by the task of representing the heterogeneity[1] that is in India.

Representing the voice of India is a complex challenge. The vastness and variation in India are well known. By 2027 India will be the most populous nation in the world. India is one of the countries with the largest number of billionaires in the world, and at the same time there is a vast population - almost the size of population of USA, living in desperate poverty.

Source of Complexity

While some of this variation is a consequence of India's size, much of this heterogeneity is a consequence of a long and complicated history[2]. In particular, the cultural heterogeneity of India poses a substantive challenge to researchers trying to obtain a cogent understanding of behaviour or attitudes of Indians. The real source of the problem is not the variation. If heterogeneity of India was merely a property of the variation that we see on so many dimensions, then diligent application of basic statistical techniques would help us represent India. The challenge of representing India does not come from the variations on multiple factors but from the interconnected-ness among these factors. Let us examine just three such basic factors and how the interaction among these variables creates complexity for representation and research.

Figure 1: Field investigations Urban India

Figure 2: Field investigations Rural India

Varied Geography

In India, data is still typically collected in person. Urban areas particularly metros with a higher heterogeneity in population are harder to represent. Representing Delhi or Mumbai in a commercially viable way is a perennial challenge given the spread & rapid growth of these urban centres. Studies with wider coverage that demand a fair representation of urban and rural areas involve inclusion of many research centres and take our field investigators to remote areas. Data collection requires travelling long distances sometimes through treacherous routes, even reaching places without pucca roads. Fair representation of the voice of India across its length and breadth is truly a logistic nightmare. But varied geography also implies variation in agro-climatic conditions, which has a profound influence on the way people live. For instance,

In particular, the cultural heterogeneity of India poses a substantive challenge to researchers trying to obtain a cogent understanding of behaviour or attitudes of Indians.

studying food habits of Indians would need to account not just the access variation that rural and urban divide creates but also the variation in agro-climatic conditions. Given below is a standard question on food habits taken from a European study of teenagers[3].

Figure 3: Investigators traveling to remote centres - 1

Figure 4: Investigators traveling to remote centres - 2

If heterogeneity of India was merely a property of the multidimensional variation, then diligent application of basic statistical techniques would help us represent India. The challenge of representing India does not come from the variations on multiple factors but from the interconnected-ness among these factors.
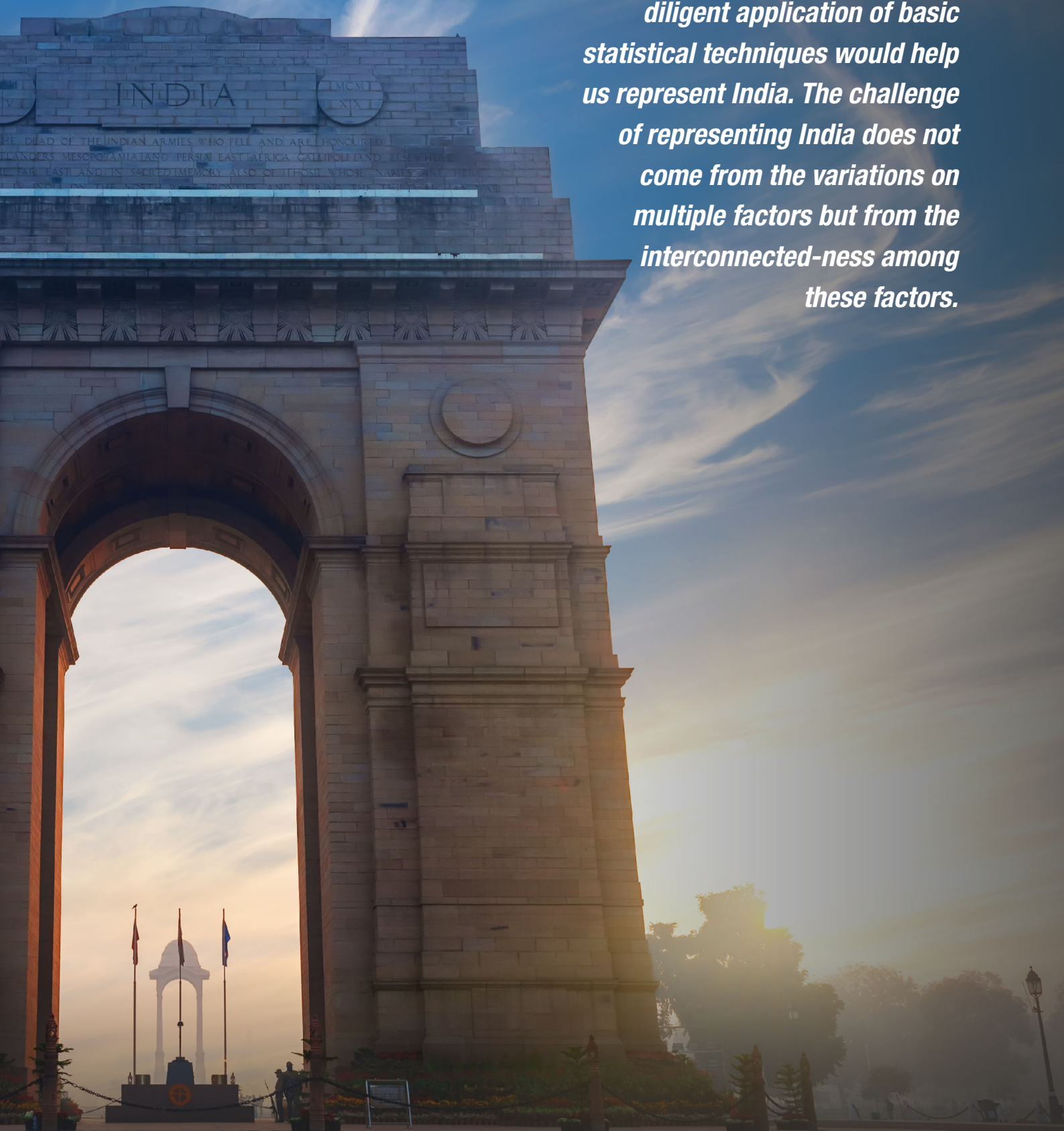
Where and with whom did you have breakfast , yesterday?

Imagine the variety of responses for such a question in India. The sheer variety of food & dish options that one would need to account for would itself make the response capture and analysis an arduous task. But beyond the range of food options to be accounted, the more important question is if there a universally understood unique concept like breakfast? The variations in agro-climatic conditions, impacting occupations and economic status, creates different meal patterns across the country. In many regions it may not be possible to find a distinctive meal called breakfast. Asking such a question will elicit no meaningful response in such places. The lesson here is that we need to examine the contextual realities assumed in the questioning or framed enquiry. The use of a term breakfast assumes that this is a readily recognizable meal. A more inclusive enquiry framing would be to ask about the first meal of the day.

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Myriad Languages and Dialects

It is well known that India has many languages. It may seem fair to think of India as containing a Europe within. But that analogy is not quite apt. The 24 languages spoken in Europe are written in just two scripts. The 22 official Indian languages are written in 14 distinct scripts. Creating an enquiry that is comprehensible to all regions coupled with the challenge of translation & production in all these languages. But variation in languages is not just about translations and scripts. Languages embody cultures, and within it live the legends, the beliefs, the attitudes and values that characterize a culture. For the translation to ring true, it needs to account for cultural variations. Imagine mounting a motivational study in India. Translation of core motivations like power, control and conviviality in all these languages goes beyond the simple task of finding a synonym. In many cases such as conviviality, there may be none. As young researchers learning the craft of designing an enquiry, we are taught to think first in any Indian language and then to translate into English. It is always easier to translate from a proximate language to another such as Tamil to Malayalam or even Hindi to Tamil, rather than use English as the core or hub reference language. What we learn is that translation is not merely capturing concepts in different languages, but the process of presenting them in a culturally relevant way.
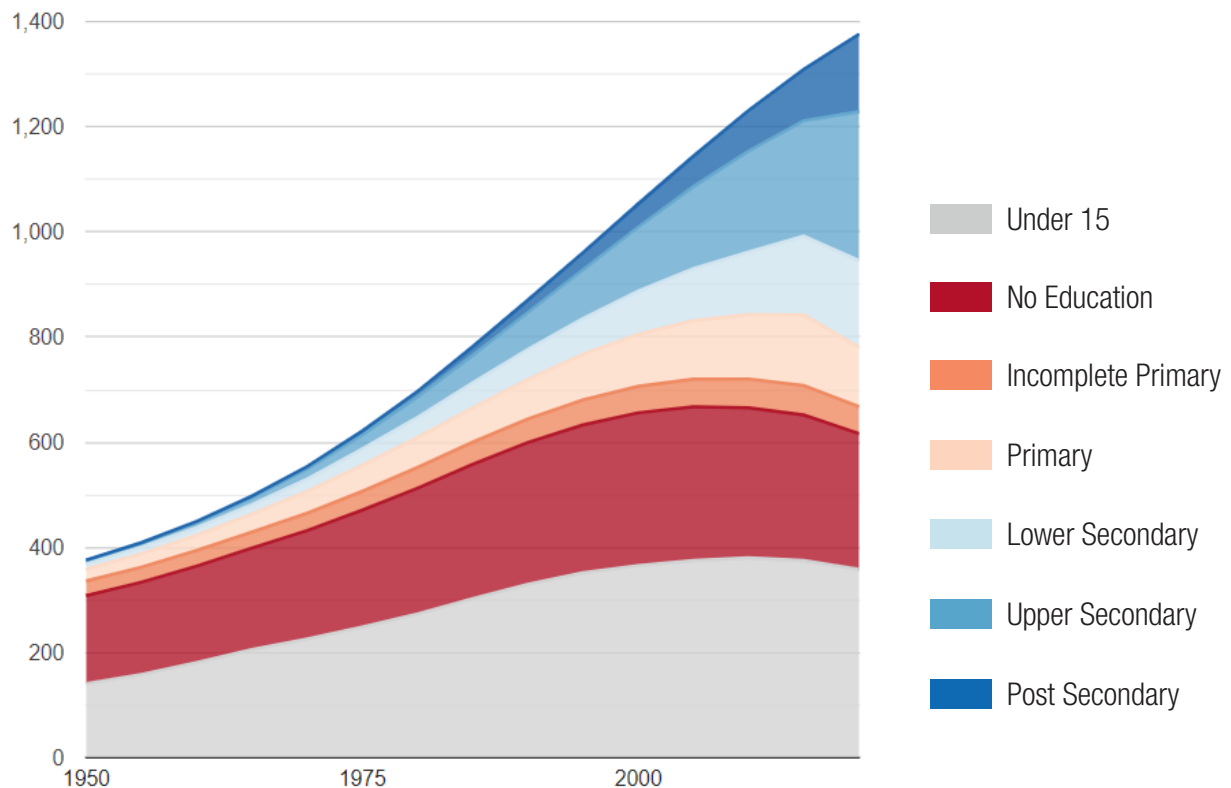
Wide Contrast in Education Levels

In the absence of high literacy levels, self-completion as a mode of data collection, standard approach in many parts of the world, is not viable in India. Surveys in India are usually administered to the respondent, which means the field investigators read out questions and the response options, and the respondent answers the question, which is then noted using a digital device or even a printed questionnaire. This manner of investigation has advantages beyond just enabling inclusion of the non-literate and less literate segments. It also creates a uniform enquiry and a more efficient data capture. But there are clear limitations too. Capture of routine behaviour which requires self-completion of diaries, is near impossible for semi-literate and illiterate populations. However, these challenges can be surmounted with a little ingenuity, like getting school children from the family or neighbourhood to record a behaviour diary for their less literate neighbour of family member.

Figure 6: Education Distribution

Legend:
- Under 15
- No Education
- Incomplete Primary
- Primary
- Lower Secondary
- Upper Secondary
- Post Secondary

Y-axis: 0, 200, 400, 600, 800, 1,000, 1,200, 1,400
X-axis: 1950, 1975, 2000

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But the real exclusion created by lack of education is more profound and has aspects that cannot be overcome. Education inhibits access of digital technology. If one deploys a digital mode of data collection such as online panels, vast proportions of populations are completely excluded. Can you get a smalltown petty trader through an online panel? No. Can you survey older women through mobile panels? Not likely, because mobile panel samples are sourced from the stream of users of gaming and other apps. Similarly, can you speak to the affluent urban milieu through face-to-face data collection? Very difficult, because access to their homes is limited and even intercepting them at places like malls, airports, etc. are limited by security regulations. Here varied modes of data collection needs to co-exist and a complete transition to online data collection is still not feasible. In India, using different

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modes of data collection simultaneously - hybrid data collection, is not just about accounting for biased representation, but is about inclusion of the full spectrum of relevant population.

Conclusion

The challenge of accounting for variation can be efficiently solved by statistics. But true inclusion can only come through a fair representation. This is not merely a sampling problem. An examination of just three basic sources of variation tells us that inclusion requires a fair representation of the contextual, cultural and access realities of populations. The challenge of inclusion- understanding the world around us in all its complexity and diversity – is about enabling the expression of people's lived truths.

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MARKET RESEARCH ON NICHE GROUPS: THE PROCESS EVOLUTION

By Geetika Singh & Aniket Katdare

The article is a share of experience and learnings from researchers who had an opportunity to undertake extensive research on a niche target group. The learnings shared here are invaluable for any marketer or researcher stepping out of their comfort zone to understand new niche target groups with a guidance on how to do so.

Marketers have long since realized that they are not dealing with homogenous markets. Given the evolution of society and its attitudes and demands, marketers and hence market researchers are now dealing with niche segments. Product innovations are being made keeping in mind the needs of niche segments to grab a larger share of the market. Market Research is also constantly expanding its horizons to understand such niche segments. The topical theme of diversity and inclusivity have made inroads into research, and in fact are vital to bring the understanding of hitherto unexplored niche segments.

This article is written by researchers who had an opportunity to undertake extensive research on persons with disability (PWD). This section of the population usually goes ignored especially when it comes to researching popular consumer categories. Given the increasing awareness and conversations around the topic of Inclusivity within society and the marketing world, marketers will be engaging with PWDs and other niche audiences – it could be smaller initiatives that garner goodwill and generate positive press for brands, or developing products and features for them, or including them in communication for better representation and normalization.

This marks a certain evolution and progression that market research methods also need. Finding no precedence for the research – framing, executing, bringing alive – the authors are sharing their learnings, which can be valuable for marketers, brands and other in the research fraternity in conducting such research, sensitively with clear actionability for future steps.

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Identifying and Acknowledging the Challenges

The first step is realizing that one needs a fresh perspective and a reset in thinking through the research. Even seasoned researchers have no experience in this domain. In this documentation we have compiled, the challenges faced, the coping mechanisms developed – starting from building gradual learning, adaptation, and sensitization i.e., some fundamental guidelines which will allow researchers to plan and execute any qualitative research amongst PWDs regardless of category.

Researchers need to start with a clean slate; this starts with familiarization with the target group (TG) in a deeper way and identifying ways to tweak our approach to ensure maximum productivity and depth of information. Brainstorming was the most critical stage to collate anticipated challenges and work through their solutions.

1. **Recruitments:** Being an unfamiliar niche TG, traditional recruitment methods were likely to be ineffectual due to lack of experience. The typical markers of education, occupation, even for income would typically not bring the results. Recruitment had to be need-based, and we needed different channels to access this niche target group.

2. **Contingencies:** The onset and continuation of the pandemic ruled out the chance of meeting in-person. The virtual method had to overcome the hurdle of connecting and rapport formation while being able to elicit the right information and insights Research instruments had to be designed to account for this to ensure depth and spread of data.

Researchers need to start with a clean slate; this starts with familiarization with the target group (TG) in a deeper way and identifying ways to tweak our approach to ensure maximum productivity and depth of information.

Motivations of PWDs to participate in research could be less than ideal – a fallout of being rarely approached or considered worth researching.

3. **Breaking Ice:** Motivations of PWDs to participate in research could be less than ideal – a fallout of being rarely approached or considered worth researching. This necessitated a rethink of our approach to ensure enthusiasm and active participation from the beginning of our interaction.

4. **Moderation and Engagement:** Researchers need to unlearn and the relearn several aspects of moderation which are usually taken for granted while designing the research instruments and planning interactions. Some learnings here are:

    *   Texting which is a regular way to communicate during first contact and coordination during recruitment can come across as insensitive if the recipient does not have or lacks function of his/her arms or is visually impaired; alternate ways of reaching out must be devised e.g., a surrogate or caretaker needs to be included in all scheduling related conversations.

    *   Conscious articulation to avoid coming across as insensitive and ignorant. Active care must be taken to prevent use of words/phrases which are insensitive and derogatory.

    *   Certain disability types mean that respondents are unable to engage in long sessions - The interactions therefore must be shorter and interspersed with short breaks.

    *   Asking for demonstrations such as surface transfers high skill wheelchair maneuvers are a no-go unless the respondents voluntarily offer to do so on their own account and risk.

When the researcher steps out to meet and speak to the niche TG, they should be able to speak the right language, ask the right questions, be sensitive in their interactions and yet be able to get all the relevant information.

The Recommended Approach for Researching Niche TG's

Immersion for the Researcher

Since this would be a new unchartered territory for the research team, an immersion into this world is essential. When the researcher steps out to meet and speak to the niche TG, they should be able to speak the right language, ask the right questions, be sensitive in their interactions and yet be able to get all the relevant information. This immersion may include:

a. Understanding disability types and their implication on the lives and hence the coping mechanisms developed

b. The products used and their role in their lifestyle and day to day workings, especially the client's product category.

c. Learning the right vocabulary for e.g., *'Handicapped'* is a word that must be avoided at all costs during an interview; replace it with phrases such as *'your condition'*.

d. Evaluating adjacent product categories will help pick up cues and provide the basis of hypothesis and topics for primary research.

e. Familiarizing with recent updates on Government policies, portrayal in media, state of the infrastructure and the mindset of the general population towards the TG. This is important for researchers to have a contextual grounding and understanding of how they are perceived and treated by society at large. This tends to be a major dissatisfier for most and is relevant to understand for a category which can be an enabler or a tool of empowerment for them e.g., Automobiles.

Build Learnings on the Intersection of the TG and the Category

Engaging with various experts who operate across the two key domains - product and TG is non-negotiable. From building hypotheses, to validating some hypotheses built during the immersion stage – this stage helps to venture deeper into the requirement for research and start building the framework for research.

To achieve this, expert panel can be split into separate groups. For PWDs in the context of the automotive space, this was:

- **TG Specialists** - NGO workers/activists, counsellors, policy makers, peer mentors

- **Product experts** - accessibility experts, planners, product design engineers
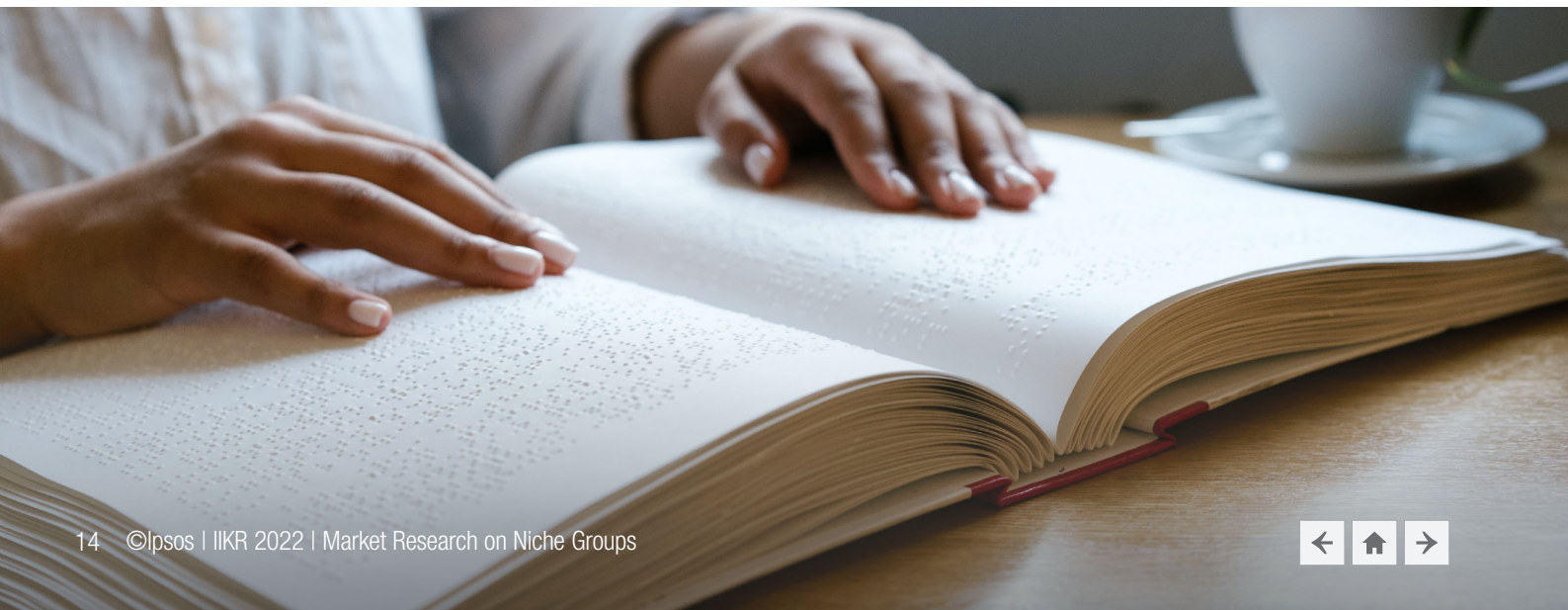
Planning and Execution

Priority must be given to respondent's comfort and convenience, more than usual in such a case. During online interactions researchers needed to be sensitive while articulating probes and during the general course of conversations.

To ensure smooth execution of fieldwork researchers therefore need to achieve some important milestones:

1. Coming across as knowledgeable is a must since the subject matter may have a technical dimension to it. Capturing the physicality of their disability during the engagements was a necessity and moderators had to optimize the time available.

2. Creating a relationship at first contact goes a long way in helping the researcher conduct meaningful dialogue with respondents, and snowballing recruitments.

3. Creation and dissemination of the 'rules of engagement' playbook for the whole team.

4. Moderators need to be selected based on their ability and willingness to adapt their style, high Emotional Quotient (EQ)/empathy and flexibility.

This article has been written with an aim to help those who are embarking on researching the 'differently abled' groups and applying standard research practices albeit with better sensitivity.

Conclusion

As markets evolve, there will be a need for new products catering to newer target audiences with different requirements. This article has been written with an aim to help those who are embarking on researching the 'differently abled' groups and applying standard research practices albeit with better sensitivity.

As marketers become more inclusive, research will and must always be in step. One research project, very intense throughout, which had extensive scope, and brought in so many learnings helped the authors embark on this refelction, applying the learnings to similar niche TGs, and being more inclusive in their mindset. It has given us a method, and a framework which gives us the confidence, capability and hope for more inclusive marketing and research.

While these learnings are from a reference point of product research they can be extended to other types of research, for a diverse set of marketing initiatives, PR, CSR, communications and so on.
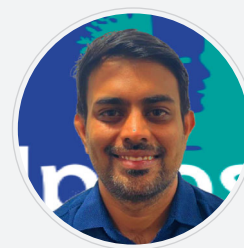
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DESIGNING MULTI–CULTURAL RESEARCH WITH CULTURAL COMPETENCY

By Tripti Sharma

This article outlines the critical success factors for conducting multi-cultural research through the lens of inclusivity. Inclusivity here implies a recognition and acknowledgement of different cultures and contexts and the need to address these in research design and implementation.

The trends in conducting research have seen key changes in the past few decades. Onset of technological applications have significantly changed the execution of research in terms of time, efficiency, and processes. Further, advent of Artificial Intelligence (AI) and Machine Learning (ML) has opened new avenues for taping big data and social data for insights. There have been events like Covid-19 pandemic and their multi-dimensional impact that called for significant adaptations to the data collection processes. Together, these developments have impacted the ways of accessing participants and conducting research.

These new changes and developments have enhanced the connectivity which opened a vast landscape for accessing individuals and collecting data across different cultures.

This article outlines the critical success factors for conducting multi culture research through inclusivity lens. Inclusivity, here, implies a recognition and acknowledgement of different cultures and contexts and the need to address these in research design and implementation. It discusses these considerations across the key stages i.e., conceptualizing, design, and

Onset of technological applications have significantly changed the execution of research in terms of time, efficiency, and processes.

drawing insights. It concludes with some tips/implications that can help designing and implementing research across diverse cultures and geographies.

Cultures manifest in different forms and influence how we think, perceive, or act. Understanding culture also helps understand or explain interactions. Collecting data across cultures therefore calls for 'cultural competency'.

Cultural competence is the ability of a person to effectively interact, work, and develop meaningful relationships with people of various cultural backgrounds which include the beliefs, customs, and behaviors of people. Gaining cultural competence is a lifelong process of increasing self-awareness, developing social skills and

behaviors around diversity, and gaining the ability to advocate for others. It goes beyond tolerance and includes recognizing and respecting diversity through our words and actions in all contexts.

This brings us to the key points to bear in mind to ensure that the research you design is addressing inclusivity. There are three key aspects of any research where you need to develop and apply cultural competency - these are shown in Figure 1 below.

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Figure 1: Conceptualizing Research - Aspects of Incliusiveness
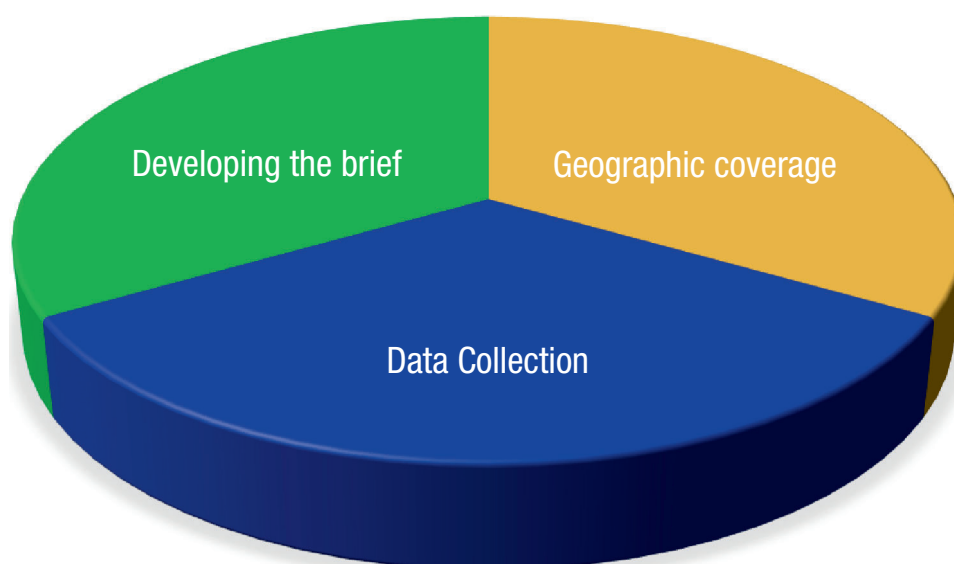
Developing/Defining the Research Brief

Considering the Target Audience

The first step starts at the beginning when you understand what and who is included or excluded to participate in the research. Challenging a given brief is a necessary condition, especially when assumptions are already made on the target groups. Use of the demographic lens, especially the gender lens, to contribute to gender segregated data is valuable not only for the specific project but also contributes to knowledge for that category, brand, and social issues. For instance, if a study is planned on agriculture practices one should not assume that all respondents will be male farmers and thus compromise on having a gender dimension to the brief. Similarly, if the study is on understanding cooking habits do not bias the research by taking women only as a natural respondent. A brief for make-up brands may by default assume that their target audience is female, but we also know that transgenders and male are also consumers if not more equal consumers of make-up products. Taking cognizance of these default exclusions can add to the effort of being a bit more contemporary and sensitive.
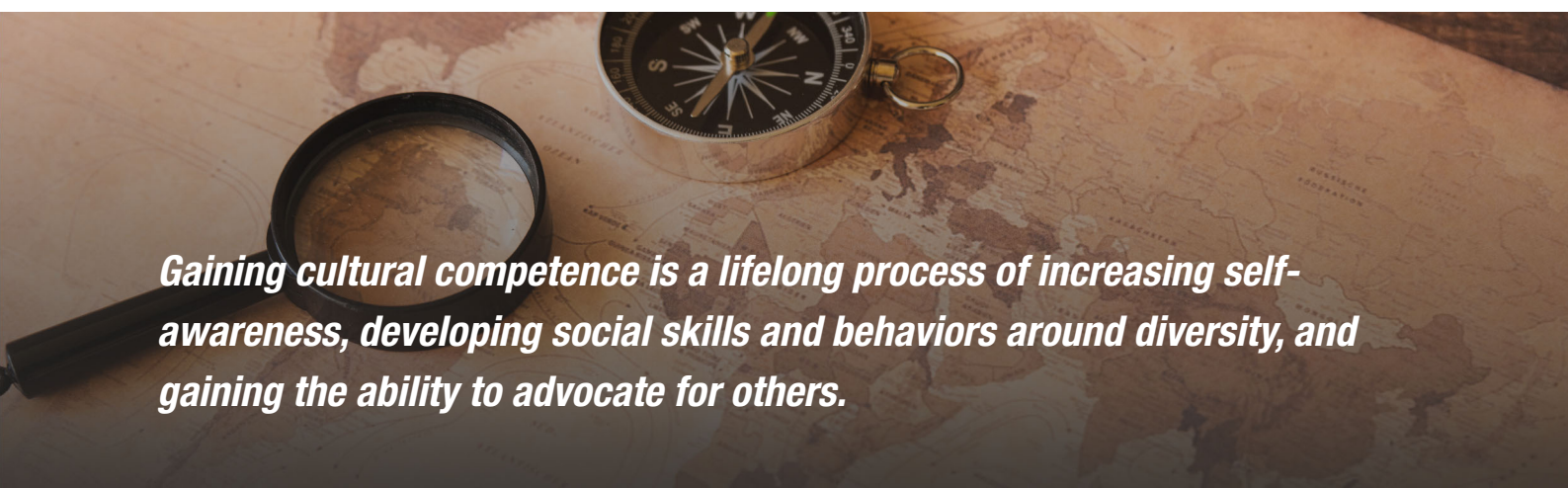
Defining the Stakeholders/target Respondents

Evaluation of program and policy are commonly sought by donors to understand not only the efficient utilization of resources but also impact of that program. Usual tendency is to speak to only direct stakeholders. However, for an effective evaluation it is important to reach out to those who are benefitted along with those who did not, not only who were involved in delivery but also not involved. This inclusion of indirect stakeholders benefits a comprehensive assessment of project/program leading to critical insights that can strengthen existing and planned interventions.

Geographical Coverage

Most development researches aim to be nationally representative unless the programme focus requires differently. However, time and resource constraints often take over and the study is 'optimized'. For example, in India one may end up with limited geographical representation as more often urban metros, tier 1 and tier 2 towns and Hindi speaking regions are researched. Similarly, for research across countries, centres where offices or teams are available are selected by default. The best practice for multi country/multi state /region projects is to have a local consultant/team and base the coverage on their assessment. Tailoring the coverage to deliver on the brief rather than a standard approach would result in more accurate and representative insights.

Gaining cultural competence is a lifelong process of increasing self-awareness, developing social skills and behaviors around diversity, and gaining the ability to advocate for others.

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Data Collection

Data Collection Mode

The choice of data collection mode and the way the respondents are accessed can also result in an inherent exclusion of certain groups/ segments. Data Collection mode is usually a function of several considerations:

- Whom we want to reach (target group)
- Accessibility of the target group
- Timeline
- Research Topic
- Length of interview
- Time available for data collection
- External factors (example -Covid-19) and others

While Online survey exclude those have no access to technology and those less willing to participate; Face-to-Face can exclude those who are part of niche or hidden/marginalized/ vulnerable groups and face stigma. Similarly, on topics like experiences of violence, sexual abuse, and perpetrator of violence, self-administrated interview questions are likely to yield more/better responses compared to interviewer administered questions. In recent times, large research, especially with multiple groups and cultures to meet is being conducted with hybrid methods to ensure wider and representative coverage.

The research implementation plan through constituting the team, training material and delivery, and supervision is essential to transfer learning. The element of inclusivity especially in the gender aspects needs special attention. It is not only necessary to have female interviewers when the subject is reproductive or maternal health, even if the subject is gender neutral, having female interviewers betters the response amongst female participants.

Questionnaire design and finalization

Questionnaire is the medium that translates research objectives for data collection. It is clearly one of the most critical success factors for research to generate helpful and actionable insights. This becomes more important when the questionnaire is to be administered across different geographies, demographics (age, education, working status, etc.) and cultures. The questionnaire development team should constitute members of representative and diverse cultures from the discussion stage, as well as be part of the review of the final version. This is emerging as a key requirement for successful administration of surveys across cultures. Our recent experience of conducting research on VAW (Violence Against Women) across 13 countries had some key learnings and insights on how women across different countries perceive and report violence during a survey. Cognitive interviews can be very useful for research across multi-cultural /diverse geographies as they help researchers determine that survey concepts and questions are understood as intended across countries.

In recent times, large research, especially with multiple groups and cultures to meet is being conducted with hybrid methods to ensure wider and representative coverage.

Cognitive interviews can be very useful for research across multi-cultural/diverse geographies as they help researchers determine that survey concepts and questions are understood as intended across countries.

Numbers tell a story that is best explained or understood within a context. It is therefore essential to ensure that the analysis reflects context and externalities that may have impacted findings. Numbers also add credence to the story leading to right decisions or actions which is the purpose of any research especially in public policy domain. Unless one looks for this context to weave the story, the data remains just as numbers without much scope. A lens of inclusiveness that focuses on bringing data pieces together to solve the puzzle is an exciting and fruitful end to a research journey.

In conclusion, this article is for the readers to take away the key message of using the inclusivity lens at each stage by asking what and whom am I excluding- data, numbers, individuals, questions, and why and is there a way to get them in to enrich the insights and make research more relevant and actionable.

This article on **Designing Multi–Cultural Research with Cultural Competency** is authored by

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A QUESTION OF GENDER: GENDER CLASSIFICATION IN INTERNATIONAL RESEARCH

By Trixie Cartwright

Abstract

The research community acknowledges that in many countries and cultures there is greater recognition of the diversity of genders with which people identify. In this paper we define and discuss the categories of "sex", "gender" and related categories and how research participants might identify themselves within these categories. We discuss methods researchers use to classify participants. We examine in depth the principal method the research community uses, namely "asking questions", but we also cover techniques based on observation. We evaluate the possible formats of questions – the introductory question posed, the response options, and, where appropriate, offer suggestions. We note the implications for international research, especially in countries where diversity and associated inclusivity are not yet recognised. The need for research in different cultures is recommended. We note the consequences and implications of adopting or not adopting questions that recognise diversity.

Introduction

Diversity and inclusion are increasingly discussed and valued in many parts of the world and it is important that research questions asked, as often as possible, include response options that allow respondents to select an answer that includes them to ensure both accuracy and representation. Research should provide an opportunity for everyone's voice to be heard and for respondents to feel engaged, motivated and valued for who they are. Diversity refers to the variety of differences among people, including ethnicity, race, gender, gender identity, age, disability, sexual orientation, religion, culture, to name but a few. It is important to collect data that is as diverse as the people and issues researched and to ensure it is inclusive and that participants feel valued. This paper focuses specifically on gender and aims to raise awareness of some of the challenges that researchers may encounter to help them make better choices based on relevant considerations when classifying gender.

Given the growing recognition of the diversity of gender identities and the pressure and need for inclusivity, researchers increasingly need to appreciate the considerations that apply to the classification of gender.

These considerations include definitions of relevant constructs and classifications and ways to measure that are ethical, respectful, justifiable, safe, practicable and economic. On weighing up these various factors, the question posed is whether it is possible to formulate a universal rule that could be included in codes of research conduct and apply across countries and modes of data collection. Alternatively, is it more realistic to provide guidelines that recognise situational factors per country and industry sector.

This paper outlines our research approach, defines key terms, then provides potentially useful sources of relevant information on the topic including guidelines. This is followed by guidance on when or when not to collect gender data and associated insights on the acceptance of a third gender. The paper then examines in detail the possible question formats and whether it is possible to formulate universal guidance on question format. The relevance of data privacy, data analysis, reporting and modes of data collection are outlined with conclusions being drawn and suggested avenues for further research provided.

Our Research Approach

We used a variety of research methods. We carried out literature searches from journals, online articles and publications. We also had discussions with some recognised experts on research and the LGBTQ+ community, including tapping into the employee network at an international social and marketing research agency.

We endeavoured to use these findings to cover the issues and options as exhaustively as possible.

Definitions

People often use the terms sex and gender interchangeably and they are not always distinguished even in legal documents. However, although connected,

the terms are not equivalent, so it is important to understand the difference. The distinction between sex and gender is very important for those who have a gender identity or lived experience that does not align with their sex registered at birth. There are different aspects of gender and consideration should be given to which category of information would be most useful and ethical to collect for the research being conducted.

The definitions are principally from the glossary of terms from (Stonewall, 2022), an LGBTQ+ rights charity, though we have added comments on some of these:

- *Sex:* Assigned to a person on the basis of primary sex characteristics (genitalia) and reproductive functions. Sometimes the terms 'sex' and 'gender' are interchanged to mean 'male' or 'female'. Sex is usually assigned and registered at birth and the categories are typically binary – male or female and, on some occasions, may include intersex.

- *Intersex:* A term used to describe a person who may have the biological attributes of both sexes or whose biological attributes do not fit with societal assumptions about what constitutes male or female. Intersex people may identify as male, female, or non–binary. In some countries there is the option to choose "X" as a neutral sex descriptor on the birth certificate for intersex people, in others their sex will be designated as either male or female.

- *Gender:* Often expressed in terms of masculinity and femininity, gender is largely culturally determined and is assumed from the sex assigned at birth. Usually parents assume their child's gender aligns with the sex at birth and it is only as a child develops that they may realise that they do not identify in that way and identify or express themselves differently.

- *Gender Identity:* A person's innate sense of their own gender, whether male, female or something else which may or may not correspond to the sex assigned at birth.

- *Cisgender:* Someone whose gender identity is the same as the sex they were assigned at birth. Non–trans is also used by some people.

- *Gender expression:* How a person chooses to express their gender identity through their name, pronouns, clothing, hair style, behaviour, voice, or body features. (My Health: Alberta, 2020).

- *Trans/transgender:* An umbrella term to describe people whose gender is not the same as, or does not sit comfortably with, the sex they were assigned at birth.

- *Non–binary:* An umbrella term for people whose gender identity doesn't sit comfortably with 'man' or 'woman'. Non–binary identities are varied and can include people who identify with some aspects of binary identities, while others reject them entirely. It is important to distinguish that having a non–binary gender identity is different from being born with an intersex body.

- *LGBTQ+:* An acronym and abbreviation used to represent lesbian, gay, bisexual, trans, queer, questioning. The "+" represents those who are part of the community, but for whom LGBTQ+ does not accurately capture or reflect their identity.

It is also important to make a distinction between gender and sexual orientation which are often incorrectly conflated. They are two distinct but related aspects of self. Gender is personal, how we see ourselves while sexual orientation is interpersonal and is who we are emotionally, romantically and/or sexually attracted to (Lewis & Reynolds, 2021). There are several types of sexual orientation, examples include gay/lesbian, bisexual/pansexual, heterosexual, and asexual.

Given the growing recognition of the diversity of gender identities and the pressure and need for inclusivity, researchers increasingly need to appreciate the considerations that apply to the classification of gender.

The Prevalence of the Non-Binary

In the research world and world more generally, gender is often used as an umbrella term for sex and gender identity and accurate data has been fairly limited, with the census data around the world often having been used as a reference and generally only asking about a person's sex. Hyde et al. (2019) discuss the costs to research progress in the discipline of psychology and to society of the reliance on a simple binary classification. These costs include limiting theory development and the fact it "denies and denigrates the existence of individuals whose bodies or identities fall outside of the categories of males or females" (Hyde et al., 2019, p184). Of course, there are other costs which we will touch on later, including non-response, should the question or some part of the question be seen by research participants to be unacceptable.

To provide some estimates of the prevalence of the non-binary it is useful to review data that exists. In a study of n=19,069 online adults aged 16–74, conducted by Ipsos in 2021 across 27 countries the global average of adults interviewed who described themselves as something other than male or female was 1% (a further 1% preferred not to say). On average across the 27 countries surveyed the percent of respondents identifying as something other than male or female was highest among the younger generations:

- 4% in Gen Z (born in or after 1997),
- 2% of Millennials (born 1981–1996),
- 1% of Gen X (born 1965–1980), and
- less than 1% of Baby Boomers (born 1946–1964).

Sweden and Germany showed the highest numbers of respondents describing themselves as transgender, non-binary, non-conforming, gender fluid or in another way, at 3% with a further 1% preferring not to answer, with India and Brazil among other countries at 2%, with a further 1% preferring not to answer (Ipsos LGBTQ+ Pride 2021 Global Survey, May 2021). This data clearly shows that there is a higher prevalence among the younger age groups and/or more comfort in disclosing that they do not consider themselves part of the traditionally viewed gender binary.

It is also important to make a distinction between gender and sexual orientation which are often incorrectly conflated. They are two distinct but related aspects of self. Gender is personal, how we see ourselves while sexual orientation is interpersonal and is who we are emotionally, romantically and/or sexually attracted to (Lewis & Reynolds, 2021).

A US publication from June 2021 supported this, reporting that 1.2 million LGBTQ+ people in the US identify as non-binary, 11% of LGBTQ+ adults, and that the majority of non-binary LGBTQ+ adults are under 29, urban and white (Williams Institute, 2021).

Canada was the first country to publish official census statistics on these populations and their data further supports the finding of higher prevalence among the younger age groups. On their May 2021 census they asked for extended gender information for the first time. The census showed that 1 in 300 Canadians aged 15 and older identified as either transgender or non-binary. Of this 0.33% of the population, 27.7% identified as transgender men, 31.3% identified as transgender women and 41% wrote in non-binary or another term, collectively called non-binary. More than 62% of those identifying as non-binary or trans were under the age of 35. One in 100 young adults ages 20– 24 identified as either transgender or non-binary (The Globe and Mail, 2022).

When and When Not to Collect Gender Data

Given the different sex and gender constructs there are a number of key questions researchers should consider:

1. Is there a need to capture such information for a proposed project?
   a. Do you need sex and/or gender classifications to meet the research aims?
   b. And if so, do you need to have quotas or screening on these questions?

   If there are topic related sex or gender differences, then the researcher needs to identify which of the sex or gender classifications are required. If the proposed measure of sex or gender is different to a recognised population measurement such as a census, does this mean that in interviews two questions may be needed - one that may be less relevant but on which there is published data. This data could be useful to provide an indication of how representative the sample might be on at least one variable. In some market categories researchers should question whether gender or involvement in a market category is the more important. For instance, certain products may be used by any gender, though one gender may predominate in either usage or purchase involvement. So simple screening out on gender

may mean ignoring a relevant segment but, of course, stops a disproportionate of effort and cost going into the capture of data from the less involved gender(s). Two screening questions, one on gender and the other on usage/purchase involvement may be the solution. For some types of research, for example medical research, there may be the need to determine (ask) biological sex or ask more specifically about their body to understand if someone should qualify or not as a research participant. By not distinguishing we may have trans women who describe themselves as female for example being asked questions about topics that are not relevant to them such as pregnancy and being excluded from something relevant such as prostate screening.

2. Not unrelated to the above, consideration should be given to the possibility that a binary gender or sex question may be received negatively by some research participants who may feel excluded and therefore disengage. In addition, not providing an option that applies to some participants may breach market research guidelines. For example, in the UK the MRS code of conduct states that the design and content of data collection processes should be

This data clearly shows that there is a higher prevalence among the younger age groups and/or more comfort in disclosing that they do not consider themselves part of the traditionally viewed gender binary.

appropriate for the audience being researched and that participants should be able to provide information in a way that reflects the view they want to express, including don't know/prefer not to say where appropriate (Guidelines for Questionnaire Design, The Market Research Society, 2014). Efforts should be made to ensure all research participants feel equally valued and satisfied that their personal preferences are being respected in terms of how they wish to describe and categorise themselves.

3. Moving away from the more traditional binary question may also result in negative reactions from some research participants who could be less accepting of the additional options or potentially be confused by question wording that they don't fully understand and thereby disengage from the project. Morgenroth et al. (2020) examine the nature of potential resistance to change in gender management that might be relevant to researchers. We assume that such reactions may differ widely from country to country and in different parts of society. We also note that in the UK those moving in the direction of the "politically correct" are described and often derided as being "Woke" and going too far in terms of change.

If there is a genuine need and no negative reaction is anticipated, then the researcher's next requirement is for information to help guide the research process.

Official and Professional Sources of Gender Information

It may be informative for researchers to examine official sources that may provide relevant statistics and examples of how gender is measured.

A recommended starting point for researchers is to examine official documentation and data sources and understand the reasons for the format of the questions and how the topic is evolving in the country. As an example, for the 2021 ONS census in the UK (The Office of National Statistics, 2021), the guidance on answering the question on sex was updated for England and Wales to include what is recorded on the birth certificate or gender recognition certificate. The question asked was:

• "What is your sex?" with the options of male and female.

A note was included that there would be a question to follow about gender identity for those aged 16 or over. This voluntary question asked:

• "Is the gender you identify with the same as your sex registered at birth?" providing the options of "yes", "no", or "write in gender identity".

In Scotland for the 2022 census, they are currently proposing to follow a question about sex with a voluntary question (Scotland's Census, 2021):

• "Do you consider yourself to be trans, or have a trans history?" with the options of "no", and "yes, please describe your trans status (for example, non-binary, trans man, trans woman)".

In the US the 2020 census did not make any changes and continued to ask binary sex, stating that the question wording very specifically intends to capture a person's biological sex and not gender (United States Census Bureau, 2021).

In Canada, the 2021 census asked about the gender of Canadians for the first time, firstly asking a question about sex assigned at birth, with the binary options of male and female, followed by a question about gender with the options of male, female and a write in. This included a note, that it refers to current gender which may be different from sex assigned at birth and may be different from what is indicated on legal documents. Some key data from this study is shown in the earlier section – The prevalence of the non-binary. (Statistics Canada 2022).

At the time of writing there are very few census questionnaires or official data sources that have added in

questions that distinguish between sex and gender. Where this has been done there hasn't been a consistent approach across countries, with differences even between the four countries in the United Kingdom. There is increasingly an effort to gather more detailed information about sex and gender and numerous countries have reviewed making changes to their census through public consultation. Even following consultation some have not made any changes to their census in this respect. It is something that is likely to continually be reviewed, though the speed of progression is likely to vary significantly from one country to another, based on cultural differences, perceived need, and also may be hindered by the infrequency of census programmes.

As a second potential source for guidelines, in particular, codes of conduct, it is wise to turn to relevant professional bodies. These may be for market research or professional bodies for polling or more widely for the social sciences (psychology, sociology, social research, anthropology, etc.). For example, in 2016, the UK Market Research Society updated their guidelines on asking gender to include a non-binary option and prefer not to answer option. Increasingly we have noted that clients raise the topic as part of their initiatives to be inclusive in the research that they conduct and it is important to ensure that there are options that provide a suitable answer for

all people. Despite the increasing awareness of the topic and guidance it seems a large part of research that we come across is yet to adopt an approach that moves beyond the standard male/female binary question. The UK Market Research Society ran a study at the beginning of 2022, reaching out to research agencies, sample providers and clients to get more insight into "Representation in Research". This study has not yet been published, but results suggest that there is still wide use of the binary gender question and that not all respondents include additional answer options to male and female in their research. There is a need for further guidance on the implementation of gender questions in terms of quotas, screening and weighting and also to recognise and respect differences across countries.

Armed with the best information available from official sources and professional bodies, we need to examine international considerations and different approaches to classifying sex and gender. There is a need to strike the right balance between the researcher's perceived need for such data and providing a feeling of inclusivity, being valued, as well as sensitivity to research participants' concerns, feelings and potential to disengage.

Whilst our focus is principally on marketing research, we should note that in the wider context some countries do

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recognise that not all people identify as male or female and provide them with another option for legal documents, such as birth certificates, driving licences, national identity cards and passports. Examples include New Zealand, Denmark, The Netherlands, Iceland, Malta, Argentina, Bangladesh, India, Nepal, US, Canada and Australia. In some countries trans men and trans women are able to change the sex on their birth certificates to reflect their lived identity. For example, the UK Gender Recognition Act has allowed this since 2004. However, there is not yet any legal recognition of other genders or the ability to legally have no gender or an unspecified gender in the UK. Some countries are starting to gather official statistics on how the population defines their gender, but in other countries there is little to no investigation nor changes being considered. Checking these types of official documents may give useful clues to a country's position on gender.

International Considerations

In addition to keeping up to date with the acceptability of the question in certain countries, cultures and markets, we also need to look at the ease of understanding the question and how this translates into other languages. It has only been in recent decades that the language of non-binary has become increasingly prevalent within English speaking cultures, but the concept of another gender has been around for centuries. Numerous indigenous communities around the world do not con ate gender and sex, with some countries having traditional third genders deeply rooted in their history and culture, such as the hijras in India, who are referenced in ancient Hindu texts, two-spirited people in Native American culture, the Muxe in Mexico and the Bakla in the Philippines. Although considered a third gender they may not identify as non-binary or transgender.

With many research programmes being international, it is important to consider the implications in other countries when making recommendations to ask gender related questions. With limited information about the acceptance of non-binary genders in different countries, other than where there is legal recognition, a possible surrogate for understanding the acceptance of non-binary genders is the acceptance of same sex relationships. As of December 2020, 69 UN member states have laws that criminalise homosexuality and nearly half of these are in Africa. For those who don't identify as being male or female it is possible in some countries or cultures that claiming this at this time could be considered culturally unacceptable, cause research participants to feel unsafe or possibly even have some legal implications (ILGA

While awareness is shown to be increasing, approximately half of non-LGBTQ+ people find conversations about gender identity and the LGBTQ+ community complicated or confusing.

World, 2020). In those societies is it probable that there is less familiarity with non-binary gender terminology and lower acceptance. Even in more accepting countries there are still pockets of communities that are less accepting. This could, for example, be influenced by their experiences, their age and culture.

The Accelerating Acceptance study (2021) looked at the familiarity, comfort and understanding of non-LGBTQ+ Americans of the LGBTQ+ experience, and comparing to their earlier study, found that Americans are becoming more understanding that the LGBTQ+ community is a diverse community of various identities across gender and sexuality. Non-LGBTQ+Americans are becoming increasingly aware that there are more than two genders, with many polled also understanding that transgender and non-binary people will continue to be a more visible and familiar part of life.

- 43% of non-LGBTQ+ American people believe that gender is not limited to female and male, an increase from 38% in 2020.

- 81% of non-LGBTQ+ American people expect that non-binary and transgender people will become a more familiar part of life just as gay and lesbian people have.

While awareness is shown to be increasing, approximately half of non-LGBTQ+ people find conversations about gender identity and the LGBTQ+ community complicated or confusing.
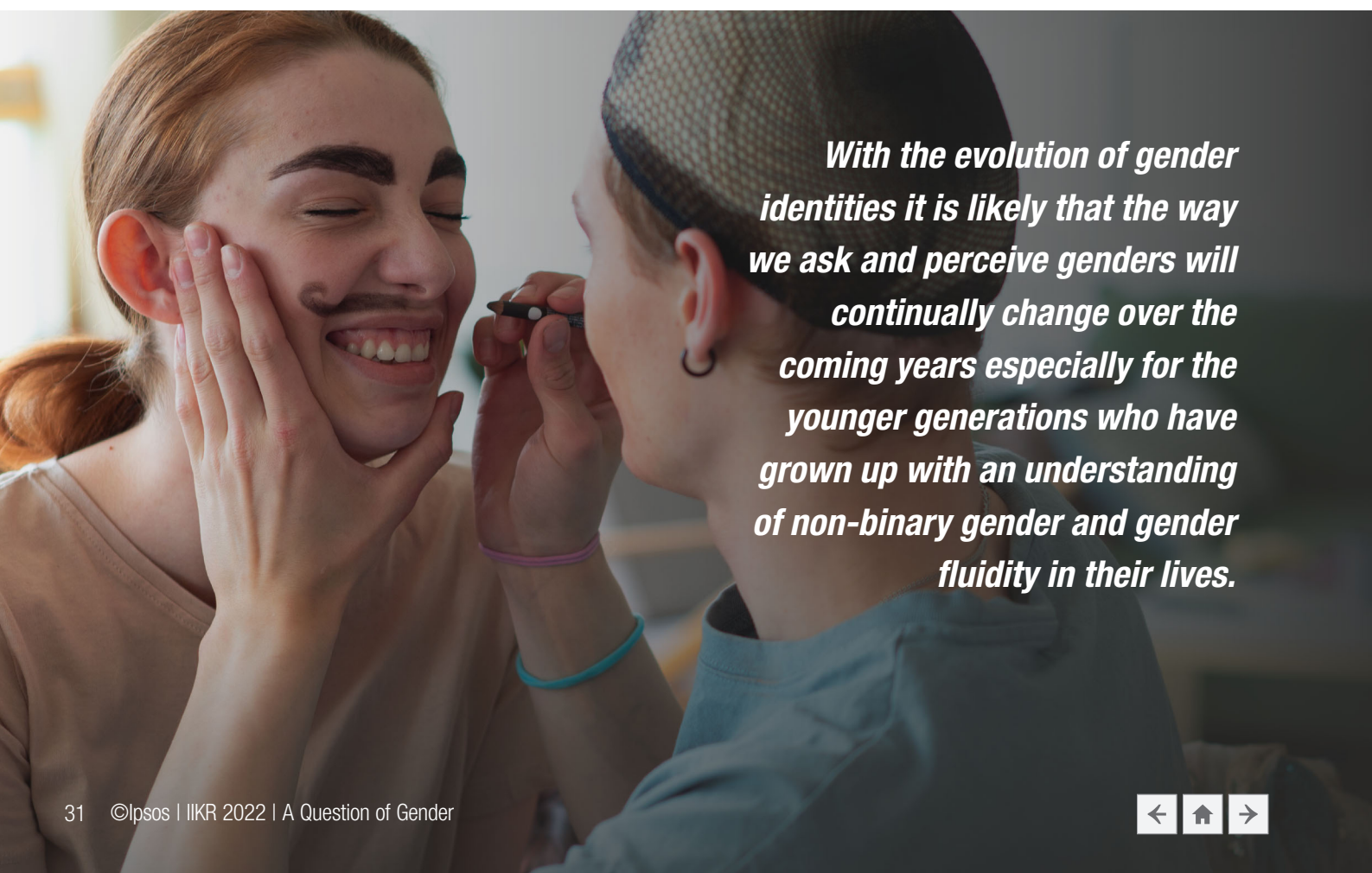
In the 2019 Discrimination in the European Union report (European Commission Eurobarometer, 2019) that researched the opinions of over 27,000 respondents in the EU, the variation of acceptance by countries is indicated.

- 59% agreed that transgender people should be able to change their civil documents to match their inner gender identity, although there is considerable variation in opinion across countries, from 83% in Spain and Malta to 12% in Bulgaria,

- 46% agreed that official documents should offer a third option besides male and female, with variation from 67% in Malta to 7% in Bulgaria.

Although this is continually evolving, we believe non-binary gender terminology is becoming increasingly mainstream, though there are still many countries and cultures where non-binary gender is not recognised. In short, some research participants in some regions may feel they have been disrespected and overlooked whilst others may be frustrated by what they see as giving in to "politically correct" trends. Researchers need to be mindful of these potentially differing reactions in the questions that they ask.

With this in mind, a pragmatic approach to asking questions that could be perceived as sensitive is advised, as it is important that market research is as representative as possible. Care should be taken to formulate questions that will balance being inclusive of all with acceptance by the majority of the population being sampled. This will help minimise any biases from non-response both at the survey stage and also when being recruited for a study or joining or engaging with online panels. With the evolution of gender identities it is likely that the way we ask and perceive genders will continually change over the coming years especially for the younger generations who have grown up with an understanding of non-binary gender and gender fluidity in their lives.

With the evolution of gender identities it is likely that the way we ask and perceive genders will continually change over the coming years especially for the younger generations who have grown up with an understanding of non-binary gender and gender fluidity in their lives.

Thoughts on the Format of Gender Questions

From a research perspective the next important step is to decide on how the question should be posed and then what answer options should be provided.

Posing the Question

Whilst some studies have explored two-step measures involving a question on sex assigned at birth and another on gender identity (Tate et al., 2013; Lombardi & Banik, 2016), we have focused on a one step measure. This one question focuses on how someone identities and lives their life rather than biological information which would only be asked when relevant as it may be considered intrusive for some people. Currently a common form of asking gender is a binary question of: Are you… male/female?

One discussion that has come up, before considering the expansion of the answer options to cover other genders, is that on most surveys (and legal forms for that matter) in the English language the answer list order when asking gender or sex is often male first, followed by female. Conventionally, in market research, many fixed list questions are listed alphabetically, however in the case of gender and sex it is the reverse. It is possible that having male first is left over from the days of clear gender inequality. There is an argument to say the binary gender question should start with female first or the options male and female be randomised to treat them equally.

There are a number of considerations when looking at amending the "standard" binary question to account for non-binary respondents and so capture more accurately the identity of an individual at that point in time. These include, for example, ensuring that the answer list provides as far as possible an option that would apply for each participant. The question should also be clear and relevant to all, and ideally not open to misunderstanding or misinterpretation by respondents. It also should ideally not lead to rejection by those perhaps irritated by perceived overly socially correct "interference". In addition, consideration can be given to how easily the question could be translated across different countries and cultures, implemented from one mode of data collection to another, and how it would be received by a respondent, whether interviewer led or self-completion. It is very important that interviewers do not code through observation or make any assumptions about a participant's gender, so should always ask the question in an appropriate way.

Some key introductory questions considered are shown in Figure 1

Figure 1: Possible Introductory Qs

S.No.	Possible Introductory Questions
1	Are you…
2	Which of the following describes how you think of yourself?
3	What best describes your gender?
4	How do you identify?
5	What is your gender identity?
6	What is your gender?

Traditionally sex and gender questions have mostly followed the format of "Are you"… male, female with no other non-binary options, without clarification of whether the question related to sex or gender. This captures biologically assigned sex but may also capture transgender people with their new gender identity due to no clear distinction of what is being asked, leaving respondents to determine the meaning for themselves. By adding more options there is a consideration as to whether the question wording can remain the same or whether it should be adjusted to provide more clarity or to reflect the wider options. Leaving the question wording as traditionally posed, could be the simplest option and less confusing to some participants who are accustomed to this question. However, "Are you" could be considered vague and open to confusion, especially to those who are not cisgender, as it is open to interpretation if the question is asking about, gender or sex, unless clear from the answer options.

Another option considered is taken from the UK's Equality and Human Rights Commission (2011) who ran focus groups and cognitive testing to understand the views of transgender and cisgender participants to various questions around sex and gender identity. In their guidance 'Which of the following describes how you think of yourself?' was part of a combination of questions including a question about how they were described at birth. It was clear and appreciated that this question was asking the respondent to self-identify, but it was felt it could be made clearer by adding gender or gender

identity. A similar conclusion could be drawn for "How do you identify?".

However, in the context of our research, at various stages we tapped into the multi-country network mentioned in the Research Approach. Some feedback from the LGBTQ+ community about this question was that using "describe" could be considered jarring or loaded in so much as it is an identity and not just a description. For these reasons we also felt that it was better to discount the next option of "What best describes your gender". The word "best" could be useful to consider in a question text if extensive answer options are included and a single code is required.

"What is your gender identity" is a clear question and was popular among members of the LGBTQ+ community, though "What is your gender" was slightly more popular. However, based on some unpublished research conducted internally at the multi-country research agency mentioned earlier, in the US and the UK, this question, although not rejected, was not generally a preferred choice.

Where possible keeping the question text to the simple and accustomed question of "Are you" is our recommendation for basic research needs, assuming that this works with the topic and response options. This results in the question being almost unchanged for the majority of the population who would fall into one of the male or female categories and allow for additional options for those that don't. It was also selected as the

Consideration should be given to data privacy rules such as the EU's GDPR and whether explicit informed consent is required. This is likely to be required if there are more detailed options or open-ended options that could perhaps indicate a medical procedure.

preferred option from the internal research study mentioned previously, of nationally representative samples in the US and the UK and is easily translatable. If the answer options don't make it sufficiently clear, a further instruction indicating that the question refers to gender could be included. This could be a rollover of a word or phrase using the cursor on an online study and a note or instruction for other modes.

Gender Response Options

Beyond the binary options of male and female there are numerous other terms that people choose to describe their gender. People whose gender is not male or female use many different terms to describe themselves, at the time of writing Facebook has more than 50 gender classifications, (including for example: Genderqueer, Pangender, Polygender, Neutrois, Gender Non-conforming, Genderfiuid, Gender variant, Two-spirit person, Non-binary, Transgender female, Transgender male, Intersex, Bi-gender, A-gender). However, for most research we don't require this level of detail. For the response options the aim has been to keep the overall question as simple as possible, while remaining inclusive, with follow up questions or more detailed questions recommended where required for the research. The answer list would of course still include female and male (the order of which can be debated), include at least one non-binary as the third option in countries or cultures where acceptable and a "prefer not to answer" option. Care should be taken that the non-binary option is inclusive and allows for different interpretations or identities within that answer option.
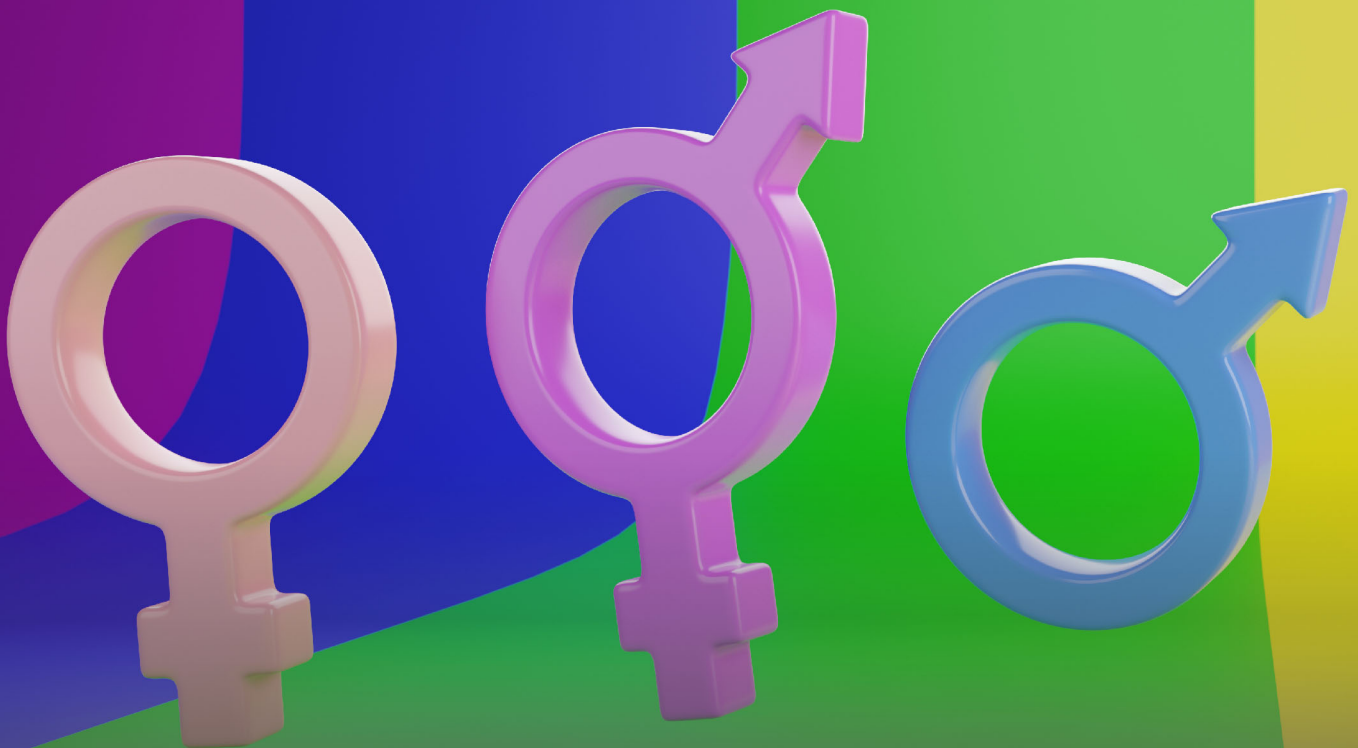
For the purposes of this paper, we comment in Figure 2 on some possible third options.

Figure 2: Possible Third Options and Comments

Possible third options	Comments
Other Neither male nor female None of the above	*Potentially sound dismissive or of little importance*
I identify on my own terms Another gender identity	*More positive and inclusive, easily translated, however it is not that you "identify as" it, but "you are"*
Alternative identity	*Alternative could be understood in different ways, meaning another choice, or could be interpreted as unusual or radical*
Different identity	*Different could be understood as odd or negatively perceived for some*
Another gender	*Positive, inclusive, and respectful*
I use another term	*Allows for ambiguity in the question, but consequently could make it difficult to know what the data is showing*
My gender is not listed	*Affirming and respectful, works well for self–completion but does not work so well for interview led surveys*
In another way	*Only works with specific question wording, e.g. How would you describe yourself?*
I prefer to self–describe (open ended) I prefer to use another term (open ended)	*Liked by the non–binary community but requires coding, and may require data privacy. The detail is not necessary for most studies on the general public*
Non–binary	*Liked by the LGBTQ+ community, not well understood by the wider community in some parts of society. Not understood in some countries or cultures, and may not be easily translatable*
Transgender	*Liked by the LGBTQ+ community, however, may require a multi–code question as transgender individuals may tick male or female and transgender*
Gender non–conforming	*Often understood as someone whose gender expression does not conform to cultural and social gender expectations*
Gender Fluid	*Not considered a sufficiently umbrella term, some non–binary individuals won't identify as gender fluid*
Gender Queer	*Often used as an umbrella term, for a person who does not subscribe to conventional gender distinctions*
None No gender	*Having no gender, often included under umbrella terms of non–binary or gender queer*

For some people gender is fluid, so there may be respondents who present with different genders in different contexts, so it should perhaps be asked at each survey rather than routed from stored information (for example on research panels). It is also important to include a "prefer not to answer" option for those that may find the question too intrusive or perhaps who are actively questioning their gender at the time of answering the survey.

There is also potentially some discussion about whether a gender question could be presented as a spectrum, however a spectrum from female to male as an example may be interpreted differently by different respondents and would not provide an answer for those that don't identify with having any gender.

In natural language, at least in English, man and male, and woman and female are often used interchangeably both in everyday life and in law. We note that there could be alternatives to female and male for gender, namely woman and man. At the time of writing the World Health Organisation (2022) states:

"Gender refers to the characteristics of women, men, girls and boys that are socially con– structed. This includes norms, behaviours and roles associated with being a woman, man, girl or boy, as well as relationships with each other. As a social construct, gender varies from society to society and can change over time".

Increasingly we are seeing more distinctions, especially among the LGBTQ+ community that man/woman be used to refer to gender with male/female being considered to refer to sex, however this is not always consistent. The Oxford English Dictionary (2022) does not make a distinction in this way and defines a woman as "an adult female human being".

Many LGBTQ+ organisations still refer to male and female for gender identity, for example PFLAG,
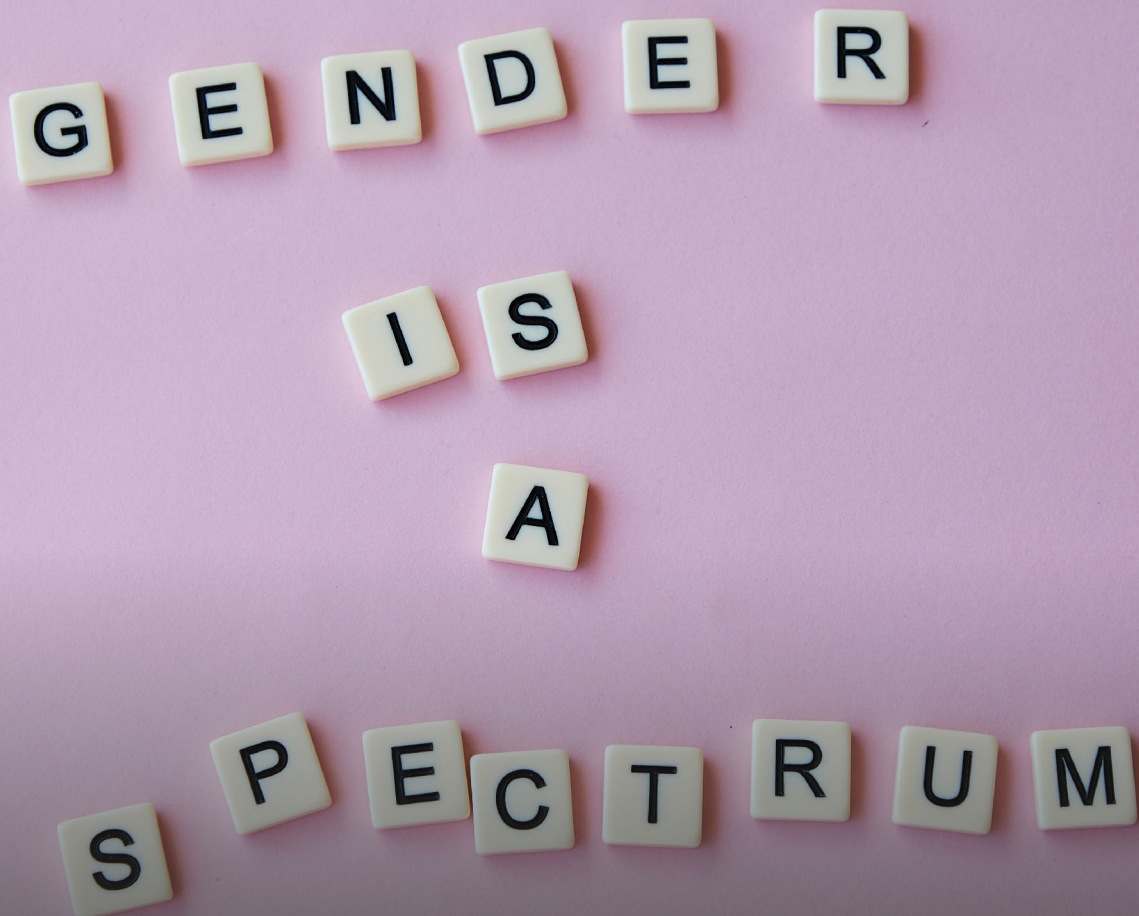
Mermaids, Stonewall. As an example, (Stonewall's, 2022) definition of gender identity at the time of writing is *"A person's innate sense of their own gender, whether male, female or something else which may or may not correspond to the sex assigned at birth."*

With the evolving conversations around gender there is an argument for saying that woman and man refers more to somebody's social and lived identity than male and female. Using man and woman as the options instead of male and female, however, can complicate asking gender across different age groups, as they are not age neutral words. This is further complicated because the age at which someone legally becomes an adult and, therefore, a man or a woman varies from country to country. Within some cultures and religions there are differing beliefs, such as according to Jewish tradition adulthood is reached at 13 and in other cultures a girl becomes a woman at the age of menstruation.

The EHRC Research Report 75 (2011) on Developing a Gender Identity Question showed that although some participants of their research were in favour of man and woman, the overall finding was that generally participants preferred the answer options 'male' and 'female'. Participants indicated that 'man' and 'woman' were age specific terms. For example, a trans participant (aged 21) did not associate herself as being a woman. Participants articulated that before the ages of 17–18 they would associate with being a boy/girl and not a man/woman. A trans participant selected both man and 'in another way' and self-described as 'boy'. It was pointed out that younger people may select 'In another way' because they do not associate with being a woman/man yet because of their age.

Another option considered was whether combining the answers could work, for example female/woman, male/man. However, the authors thought that this could be considered ambiguous or confusing and still may not work for the younger participants who could still prefer to select a third option.

Keeping with male and female as the two options remains consistent with what has been asked for years and removes the need to consider adjusting the question wording by age. In addition, where countries have introduced new questions to their census, there has not been a move to change the language for gender away from male and female. We have no evidence or thoughts that there is a strong requirement to change the wording to man and woman. At this time we believe it is acceptable to keep with the male and female options and it is unlikely to be offensive. We also don't have any evidence to show that changing the answer options would change how people would answer. It should be noted that the use of male/female or man/woman is not consistent across languages, with for example in Spanish "hombre"/"mujer" often being used as the translation of male/female. Adapting the response options to man/woman when asking gender in English (and perhaps in other languages) could be something that changes in the future as the discussions and terminology continue to evolve. However, further investigation of how this might impact responses especially among the younger generation is recommended.

It seems likely that although there have been efforts to add the broader non-binary question into surveys, when it is implemented it still may not be totally inclusive. For example, the language that is used may not be inclusive. In a study on education, it is better to refer to headteacher rather than headmaster or headmistress. Non-binary and transgender respondents may either be incorrectly screened out of an interview or not be included in the analysis when they should be. The same issues may apply to those who prefer not to answer.

Keeping the question simple and with few options helps to simplify collecting this data across countries and cultures, and for more specialised research where more options might be used there will be time to consult with countries to understand the best descriptors and translations.

The Issue of a Universal Question Format

The authors have stated that their preference is for the question posed to be simple and where possible consistent with what the wider population is familiar with, leaning towards "Are you".

"What is your gender?" is also considered a good option and provides additional clarity in the question. This could be particularly important should there be a series of questions including, for example, sex and gender, for studies specifically researching the LGBTQ+ community, or if the answer options do not make it sufficiently clear that the question is about gender.

As regards to the response options we provide guidance for differing research needs. For a basic question the authors recommend in general to include only one answer option that is fully inclusive of those that don't identify as male and female. To only have one additional option may be considered a catchall category for everyone who doesn't identify as male or female. However, consideration needs to be given to what level of detail is required for the research being carried out and that personal data collected are relevant and not excessive.

When reviewing the comments about the third options in combination with the preferred questions the authors prefer "Another gender" with the following points directing their views:

• Keeping gender in the answer response, allows for additional clarity, even if the question doesn't specifically refer to gender (for example using "Are you") or if a respondent is confused by the use of female/male versus man/woman.

• The terminology is inclusive and translatable. Terminology is evolving, and this answer option is likely to continue to be relevant for newly recognised genders and can include third genders for cultures with a history of third genders.

• This answer option works well both for self-completion and for an interviewer led survey.

A non-binary question that could be used for most basic research needs in most countries and cultures is shown in column 1.

Figure 3: A Possible Question Framework

1) Basic non–binary question	2) Basic binary question	3) More detailed question
Can be used where non–binary is accepted	*Can be used where non–binary not accepted or safe*	*Can be used in more accepting countries or cultures, or other population groups if required*
Are you • Female • Male • Another gender • Prefer not to answer	Are you • Female • Male • Prefer not to answer	Are you • Female • Male • *(insert local cultural non binary category/categories)* • Another gender… *(closed or open ended)…* • Prefer not to answer

In countries and cultures where it may not be considered safe or acceptable to indicate that someone is non-binary, at current times having the question as optional to research participants or adding a "prefer not to answer" option to the binary question, for those not identifying as male or female may be the first step (see column 2 in Figure 3). In time these countries and cultures may move to ask more detailed questions.

In countries or cultures where there is high acceptance and well-known terminology in this area, or where the research topic requires a deeper understanding of gender, researchers may decide to add another option or options to the question. For example, adding in "non-binary" as an additional option could be appropriate in countries or cultures where this is a well-recognised term. Other options that could be included are "none" or "no gender". If adding in additional options, care should be taken to ensure the question still works effectively. For example, if adding in an option, such as "Transgender" the researcher should consider having the question as a multi-code or adjusting the question wording to account for the possibility of more than one answer applying to a respondent. For some people their gender is fluid and it may be appropriate to enable participants to choose more than one option if doing so describes their identity more accurately. This is especially the case where more detail would benefit the research. If the question were to be kept as single code, guidance could be provided for those that felt more than one option applied to them to specify their own answer.

Consideration should be given to data privacy rules such as the EU's GDPR and whether explicit informed consent is required. This is likely to be required if there are more detailed options or open-ended options that could perhaps indicate a medical procedure.

Keeping the question simple and with few options helps to simplify collecting this data across countries and cultures, and for more specialised research where more options might be used there will be time to consult with countries to understand the best descriptors and translations.

A person assigned female at birth who has transitioned may identify as a male rather than transgender (and likewise a male at birth as female) and therefore select their newly adopted gender from the initial binary responses. Where we have observed questions with male, female and transgender as options it does not necessarily follow that all transgender people will choose transgender; it is likely that many will pick the gender that they now identify as and live as.

With this in mind, it is likely that the options for a gender question will be understood as: shown in Figure 4 below.

Figure 4: Likely Options for a Gender Question

Answer Option	Likely Understanding
Female	Females including trans women born male
Male	Males including trans men born female
Another gender	Anyone who does not identify as male or female (often referred to as non-binary) and may also include trans men and trans women
Prefer not to say	

So, because some transgender individuals may select any one of the above there is still some lack of precision but in most research projects this may not matter for analysis purposes and if it is important to distinguish then more detailed questions should be asked.

Consideration should also be given as to whether these questions should be adapted when asking for information about other members of the household including children, and whether there needs to be another option provided such as "unknown" or "undecided" as there are parents who choose to leave the decision on gender for their child to make.

For certain areas of research, we may require more detailed information and therefore choose to ask a more detailed question or set of questions. For example, on a medical or mental health study about the LGBTQ+ community we may capture self-described biological sex, gender and sexual orientation along with age and other demographics and then also ask a question to confirm whether their gender is the same as the sex registered at their birth or directly ask whether they are transgender or have a trans history. Other questions that may be considered useful include asking about the pronouns that they choose to use or asking about their gender expression.

Alternatively for medical research, where gender history is not relevant, specific questions could be asked to understand who the topic is relevant to from a physiological perspective. For example, for a study about ovarian cancer there could be a question specifically asking if the respondent has ovaries.

Until there are official or robust statistics on the proportions of people in the population that don't identify as either male or female there is a challenge for researchers to know how to weight this population making it difficult to justify applying any weighting other than 1 to these participants.

Analysing and Reporting Data

Once it is clear that a non-binary gender question should be asked, there remains the question of how to manage the analysis and reporting. There is a lack of population data that represents the non- binary community, and it is likely to remain that way for some time. While most census surveys don't hold information on sex or gender beyond the binary, all non-binary participants that qualify for a research survey should be included within the data set and, assuming sample sizes allow, the non-binary respondents can be represented and analysed as required. Currently the number of respondents who claim to be in the non-binary category is very low, however this is something that is expected to increase as it becomes more accepted in society. It is already apparent that there are higher proportions of the younger age populations and of the LGBT community who don't identify as either male or female and it is possible that people will become increasingly confident to openly identify this way even if inhibited at this time. Until there are official or robust statistics on the proportions of people in the population that don't identify as either male or female there is a challenge for researchers to know how to weight this population making it difficult to justify applying any weighting other than 1 to these participants. It should be noted, that most research asks about gender and so for many years it has included the potential inaccuracy of weighting the binary gender question to the binary sex question on the census.

It is also important to be mindful of gendered language and avoid unconscious bias by using neutral and inclusive language in the data analysis and reporting. When there is a choice between a word which specifies a person's gender and a word that doesn't, it is more

inclusive to use the neutral one unless the gender is relevant to the context. For example, Chairperson rather than Chairman. In addition, assumptions should not be made about a person's pronouns or household composition, so unless clear from the answers, neutral pronouns of they/them should be used when speaking about other household or family members.

An additional consideration in reporting international work should be in the translating of reports, with translators briefed on the importance of using inclusive language. This can be more complicated depending on the language; some languages such as Spanish, French and German are gendered where people and objects are given a gender, and on the other spectrum there are genderless languages such as Chinese, Estonian and Finnish where they use the same word for he or she. With the evolving conversations around gender, language and guidance is evolving in a number of countries and cultures to help address this need.

Mode of Data Collection

In terms of collecting gender information for self-completion questions online, or CAPI (Computer Assisted Personal Interviewing) or by postal survey this can be through direct questioning if deemed the most likely method to yield the desired information accurately. There are then still numerous considerations related to the form of question. These include the nature of the introductory question and the response options provided.

There could be some participants who are less comfortable about disclosing their gender or expressing it to another person. Therefore, may be some differences seen between interviewer led and self-completion studies, with self-completion providing more anonymity and as a result possibly more accuracy, especially among pockets of society less comfortable with being outside the traditional binary.

So far we have focused on posing questions on a person's gender but observation is also a possibility we need to consider.

Researchers may rely on interviewer observations in face-to-face situations and historically many interviewers will have been trained to code sex and gender without asking. Whilst the validity of these may be relatively high given the low numbers of non-binary people in the population, at this time it should not be relied upon. It is also possible that telephone interviewers have made assumptions purely on the basis of the

When there is a choice between a word which specifies a person's gender and a word that doesn't, it is more inclusive to use the neutral one unless the gender is relevant to the context. For example, Chairperson rather than Chairman.

respondent's voice. It is increasingly important that respondents are asked to answer questions for themselves rather than any assumptions being made. Interviewers should be briefed or provided with guidance around how to ask this question and the potential sensitivities for a respondent.

There have been studies that examined whether observing a person's gait (Igual et al., 2013), handwriting (Siddiqi & Chibanni, 2018) or written content (Figueroa, 2017) offer ways of classifying gender but some studies often seem unclear in their focus (sex or gender). This raises the potential drawbacks of automating the process without human intervention and perhaps indicates that despite advances in Artificial Intelligence, it is likely to be impracticable, uneconomic and potentially non-compliant with codes of conduct for marketing researchers.

Finally, researchers need to gauge whether the proposed mode of data collection (questioning or observation) is likely to cause concern over privacy, safety, or anonymity that may lead to non-response.

There could be some participants who are less comfortable about disclosing their gender or expressing it to another person. Therefore, may be some differences seen between interviewer led and self-completion studies.

Conclusion

In the introduction we posed the question whether we could formulate questions to be used universally or simply provide guidelines and consideration? Given there are numerous countries where it is likely to still be unacceptable and potentially unsafe to ask a gender question beyond the traditional binary, there seems a limit on a universal approach at this time. Given the different levels of acceptance in countries (and among different subsets of populations) we have provided a basic framework that we believe works for both self-completion and interviewer led surveys. It could be used as is or built upon to meet requirements for a specific research objective, country, culture or target group. How detailed the response options need to be will depend on the purpose of the research and researchers should consider where they need detail and where they don't.

If the research focuses on a representative sample of the general public, then from a research perspective, as opposed to an equality perspective, while numbers of non-binary people are low, a catchall third response option on a single code question may suffice. This would create space for both newly recognised genders and

traditional third genders from countries with this deeply rooted in their culture. As their prevalence increases the size of the sample group that can be analysed may also increase and more distinction in the answer options might be required. It is acknowledged that gender is complex, and people may identify as more than one category. For research where more detailed information would be desirable, a fuller set of response options that could be multi-coded with an open-ended option and the appropriate data privacy consents might provide additional detail useful for analysis. If single coding is preferred with a longer list, then an open-ended option could be provided so that the respondent can express the gender they choose. In countries or population groups where there is strong resistance to an extended gender question having a binary question with the addition of "prefer not to answer" may currently be the best solution. Researchers in different countries and cultures should be careful to review this regularly and expand the question when appropriate.

Consideration has also been given to how changes to the question design could result in both positive and negative

reactions from respondents, resulting in increased engagement or drop out, and potentially affect representivity. We looked at the balance of having an inclusive question that meets the needs of the non-binary community, captures the level of data required for the research need, while minimising non-response from respondents who may be unfamiliar or less accepting of a more expansive gender question. Where there is concern about drop out, adding a more detailed voluntary question at the end of the survey could be considered, so as not to impact the overall research findings. There is the potential for future research on the effect of different types of gender questions on research participants' engagement and drop-out – an issue that Tate et al. (2013) touch on with their reporting of missing data. In addition, research could examine the associated trade-offs on duty of care for minorities, duty of care for the research project's validity and indeed for duty of care for the involved researchers with potential concerns of offending one party or another.

We noted that sex and gender are typically used interchangeably in society, and that there are some contexts where it is really important to understand the distinction. The physical or biological sex status can be misleading as it may not reflect the psychological state of mind and associated behaviours. When requiring information about someone's physical attributes, it may be simpler and help with response to ask directly about that, providing some context and explanation as to why the information is needed.

In the coming years gender questions are likely to evolve, although we don't know what the options will be or whether they will be cross culturally relevant. We recognise that this is a rapidly developing area and that in more accepting countries and in some subsets of the population it is likely to evolve more quickly, for example among the younger generation and the LGBTQ+ community. Periodic research in countries and different cultures will help understand how it is evolving and when the questions may need updating or re-writing. It is likely that the number of gender options will increase and pluralistic gender will become more and more common. Inclusivity should be the priority everywhere where it would not compromise safety of the participant or the integrity of the research. Respondents are core to what we do, and it is important to ensure there are appropriate and dignified response options for all respondents. This will in turn support us in taking steps towards being able to systematically measure those communities, whilst ensuring all feel respected, engaged and valued for who they are in the changing world around us.

We hope that this paper will help to drive discussion from practitioners and professional bodies around the world in refining our understanding and approach both now and in the future to keep up with this evolution.

Acknowledgments

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UNSTEREOTYPING FOR INCLUSIVITY

By Sakina Pittalwala

Starting with the example of George Floyd, the article talks about need of inclusivity and rampancy of racism even in Indian culture, gives examples of gender inequality at work. Advertising in India has particularly been stereotyping roles, with some exceptions. Hindi cinema is adapting to changing culture by moving beyond traditional stereotypes and showcasing the progressive role portrayals.

Introduction

The murder of George Floyd in 2020 and the subsequent Black Lives Matter movement shook racist biases to the core, driving home narratives of social injustice and prejudice, not only in the USA but around the world. This forced brands and businesses to re-evaluate their business strategies to become more inclusive as well as diverse, so much so that today, they have become unignorable imperatives. Corporations have become much more focused on ensuring balanced gender representation in the workforce as well as in the C suite. Iconic brands such as Hindustan Unilever's Fair & Lovely dropped the highly controversial first part of its name.

J&J withdrew its fairness product portfolio from Asia. Both these moves were perhaps prompted by the fear of a backlash.

But the bigger question is whether the impact of the Black Lives Matter movement is even felt at the grass roots level. Indian society is rife with divisiveness, as indicated by The Ipsos Global Trends Survey India Report 2021. "Racism" is rampant in a variety of forms of discrimination – religion, caste, colour, cultural dissimilarities and class. Stereotyping persists in almost all spheres of society.

It is time for Indian brands to think boldly and definitively. India thrives on its inherent diversity, and it is about time that brands and corporations embed that into their fabric, naturally and automatically. There is a need and opportunity to make conversations authentic and heterogenous, a need to move towards a world where diverse stories across the spectrum all find a place. After all, great brands don't just reflect safe and accepted norms, they dare to set agendas in culture at large.

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The Reality

The recently published UNICEF Gender Bias and Inclusion in Advertising in India Report (April, 2021)[1] measures the level and type of gender stereotyping in Indian advertising through an analysis of the 1000 most viewed advertisements on television and YouTube until 2019. This report throws up some interesting insights. Women are as likely as men to be represented in advertising and are even dominating screen time. Despite this strong presence, the representation of women remains replete with stereotypes:

- Women tend to be portrayed as young and attractive, in line with traditional beauty norms

- They are shown as mothers/primary care givers who are primarily seen in private rather than public spaces. They are shown as being responsible for household decisions. They are more likely to be shown cleaning, cooking, or shopping for household products than men

- Six in ten female characters have light skin tones and only 4% of female characters have dark skin. Those who have lighter skin are more desirable and are likely to belong to middle and upper classes; those with darker skin are more likely to belong to lower classes

- Young boys (1-12 years) outnumber young girls

- Men are more likely to be shown as having a paid occupation and as leaders and very seldom involved in matters of the home

- There is virtually no representation of those with disabilities (0.3%).

- Representation of the LGBTQIA+ community in mainstream advertising is also absent (0.2%). Smaller niche brands have occasionally used this route but none of the bigger mainstream brands have been brave enough. Those that have used known LGBTQIA+ in their advertising have focused more on their celebrity status

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Six in ten female characters have light skin tones and only 4% of female characters have dark skin. Those who have lighter skin are more desirable and are likely to belong to middle and upper classes.

- Only 6.4% of ads featured lower class protagonists.

Beyond this report, many other glaring omissions are obvious. The Grey Generation are generally depicted mainly as doting grandparents. Although this is a rapidly growing segment with higher than before disposable income, almost no one other than travel operators appearing to be creating products that meet their lifestyle aspirations. Though working women are significant, if not equal, contributors to household income (especially in the larger metros), it is still very uncommon to see ads for financial products or automobiles or even high-end mobile phones targeting them.

As far as gender equality is concerned, we know that the Covid-19 pandemic sowed the seeds of greater fluidity in set gender roles. Men have been contributing to household chores from cooking, cleaning, and looking after children as they attend online classes. The EY report Sentiments of India (October 2020)[2] captures how life has been impacted by the pandemic - how male members have been contributing to household chores, influencing brand choices of even household product while shopping online. Yet, it is probably safe to say that most brands have not made any significant changes in their brand or communication strategies to reflect the new status quo emerging as a result of the pandemic.

How Brands are Responding

It is not as if no brands have tried to shatter gender or other stereotypes (or haven't had serious conversations about the same). There are many famous examples – Ariel (#ShareTheLoad), Havell's (Hawa Badlegi), Tanishq, Vicks Generations of Care (about a transgender mother), Gilette (Man Enough), Flipkart, Red Label, Surf Excel, Ghadi (festival ads), Bhima Jewellery's Pure as Love campaign (capturing a young boy's journey as he transforms into a transsexual), Cadbury's role reversal in its iconic Kuch Khaas Hai ad etc. Some of these brands

began their more inclusive journey even before 2020 and some have begun the process of transformation since then.

Other than Tanishq and Red Label who have bound unstereotyping in the DNA of the brand comms, most other brands have typically run single, topical campaigns, more to communicate brand purpose. Once these campaigns run their course, brands go back to mainstream advertising, focusing on product benefits which inevitably address the traditional stereotypes.

Some winds of change are clearly evident in mainstream advertising. The depiction of the woman and mother has undergone a change – from someone who lived in the husband's and child's shadow to someone today who is actively responsible for enabling their success, from someone who always subdued her personality to someone today who is a sum of various personalities. There are efforts to reflect a different kind of man too – softer, more vulnerable, more "woke". But these are more like ripples in water. It goes without saying that stereotypes abound.

It may be argued that any attempt to change narratives draws severe criticism and backlash. Many brands in recent times would bear witness to this – Tanishq, Dabur's Fem, Fabindia, Manyavar Mohey et al. All change is always going to be met with resistance, until it no longer feels different. The changes in the depiction of women and mothers and men are testimony to this. Stereotype-breaking advertising stands out from the clutter, and this is bound to have dividends for the brand in the short and longer term. There is also bound to be positive rub-off on the brand equity. There is evidence to show that ads that show more progressive gender roles generate 32% short-term sales and as much as 51% positive impact on the brand's equity[3]. Beyond that, there is the much bigger opportunity for the brand to drive behavioural and societal change.

Beyond advertising, there is low visible evidence of brands having launched new products or having modified brand strategies to address the new emerging target groups such as men for household products, or the grey population, or those with disabilities (though some automotive companies are viewing the latter segment seriously). Here too lies opportunity to drive a more inclusive discourse.

Men are more likely to be shown as having a paid occupation and as leaders and very seldom involved in matters of the home.
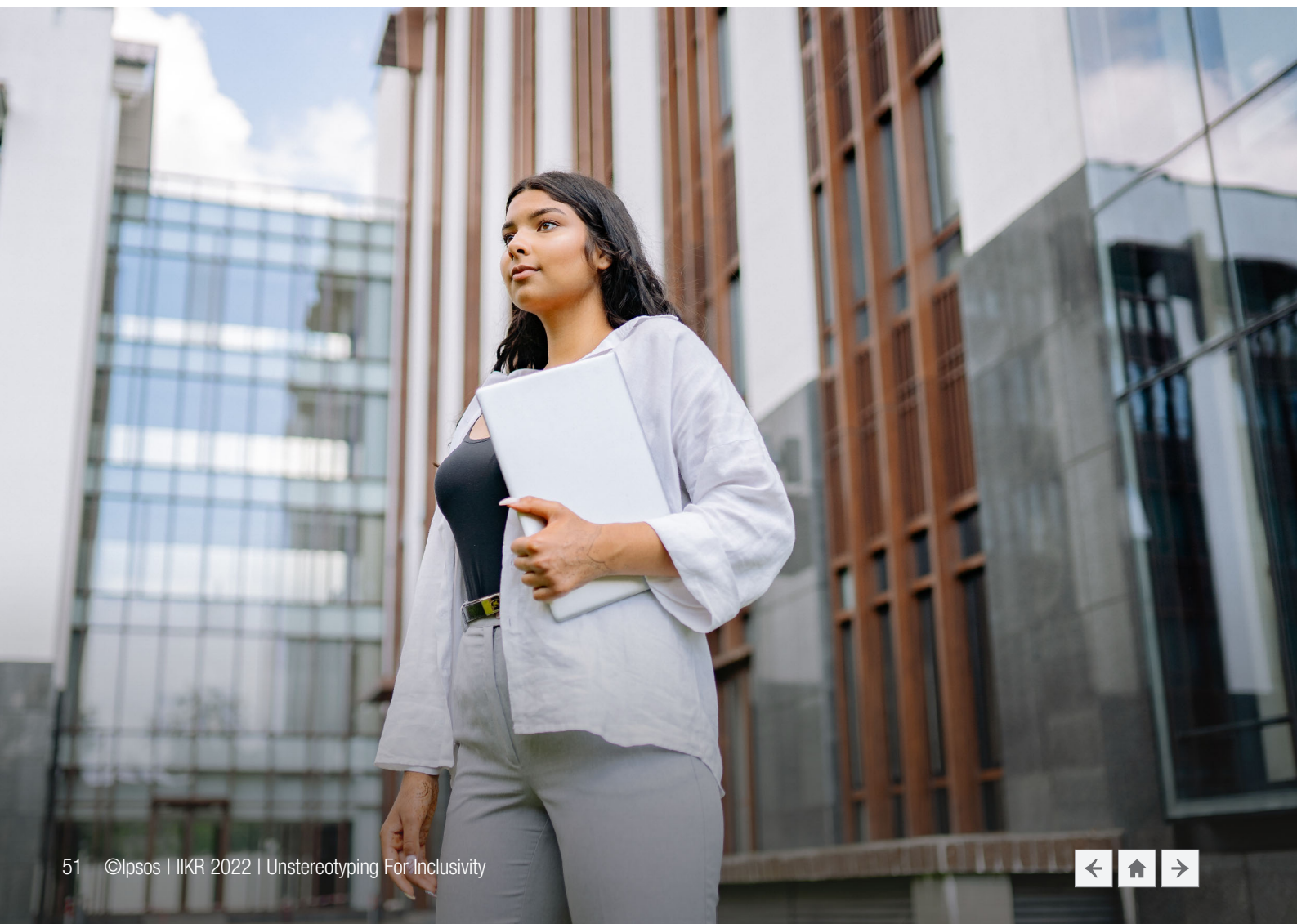
Learning from Hindi Cinema

Hindi cinema has always been littered with stereotypes. In films, the most common tropes for Muslims are that they are poor, have very large families, very orthodox and often depicted as "terrorists", especially post 2001. Other minorities such as Parsis and Christians are generally caricatured as people who cannot speak Hindi correctly and who are more Western in their thinking. Female lead protagonists must be fair, beautiful and slim bodied, though lead male protagonists need not adhere to these standards. Traditionally, women have always been depicted as doormats and selfless mothers who only live for their husbands and children. Indians from the North-East are generally dismissed as "Chinese" or "Corona" (in the wake of the Covid epidemic originating in Wuhan, China). LGBTQIA+ representations are mostly cringeworthy and used to provide comic relief. Disability in a character is typically used to evoke pity and tears. And male lead actors belonging to the grey generation routinely cavort with lead actresses who are half their age or less.

Having said this, there have been some gusts of fresh air in Indian cinema. Since the early 2000s, film makers have become bolder and more experimental, especially now with the growing popularity of OTT platforms. Hindi cinema has seen some refreshing topics being taken up – women-centric stories reflecting their desires and aspirations, homosexual relationships, lavender marriages, house husbands, transexual lead characters, upper caste police officers coming to the rescue of Dalits, featuring of actors from the North East in leading roles and so on. What is particularly gratifying is that these unstereotypes have met with box office success, especially in urban India. Actors such as Ayushmann Khurrana and Rajkumar Yadav, among others, have earned their success through being brave enough to essay such roles. Their brand value keeps growing with every successive such portrayal.

This should serve as encouragement to brands to adhere to the path of unstereotyping.

Conclusion

Greater inclusivity is the need of the hour in an increasingly polarized and divided Indian society. Brands can be major catalysts of change and positive reinforcement of more inclusive behaviours and attitudes. Consumer look to brands for inspiration and there is a growing population that is seeking deeper connect via brand purpose. Advertising in particular needs to adopt more progressive and inclusive codes. Given the potential dividends, it is worth taking the plunge!

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WOMEN IN ADVERTISING & THE MEDIA

By Jill Urlage

This article explains that if we intend to shift our social norms and drive gender equality, we need advertising and media to play a role now by positively reflecting women in advertisements, movies, streaming content, and television entertainment. The author sheds light on Ipsos including the Gender Equality Measure® (GEM) questions in all creative assessment research® projects when an ad includes a female character.

"If you can see her, you can be her™."

Media and advertising play an important role in our culture, reflecting the social norms of our society. Back in 2011, only 26% of leading roles in movies went to women and this number didn't change much until 2018 where we saw women represent 41% of the leading roles[1]. For many years, this reality helped shape many young minds to believe that it is normal for women to be secondary to men. Through television entertainment we have witnessed many female characters battle sexism and discrimination while men continued to be the hero of the story. Media and advertising have the power to change how people think about gender roles and, at the same time, help shape the way we view one another.

Women in Advertising: A Timeline of Perceptions

Think back to the ads of the 50s and 60s that showed women in the kitchen, managing a family and taking care of their husband. A meta-analysis of advertising globally[2] found that women are much more likely to be pictured as dependent and in the home than men.

In the 70s and 80s, women shifted towards being portrayed as a little more independent from men and were shown in more diverse roles. However, this wasn't necessarily for the better. Women were still too often portrayed as sex symbols or unattainable images of perfection.

This portrayal continued into the 90s and the 21st century. With the creation of social media platforms, a new way for communication and marketing developed. Social media plays a big role in how young girls view themselves with a recent survey showing that 92% of American teens access the internet on a daily basis[3]. Spending too much time on social media platforms has been associated with body image issues and eating disorders in teenage girls. Almost nine out of 10 (88%) girls say they compare themselves to images in the media and half claim they feel negatively affected[4]. With this much engagement on these platforms, we need to put an end to this unhealthy presentation of perfection and support content that will help girls feel good about themselves.
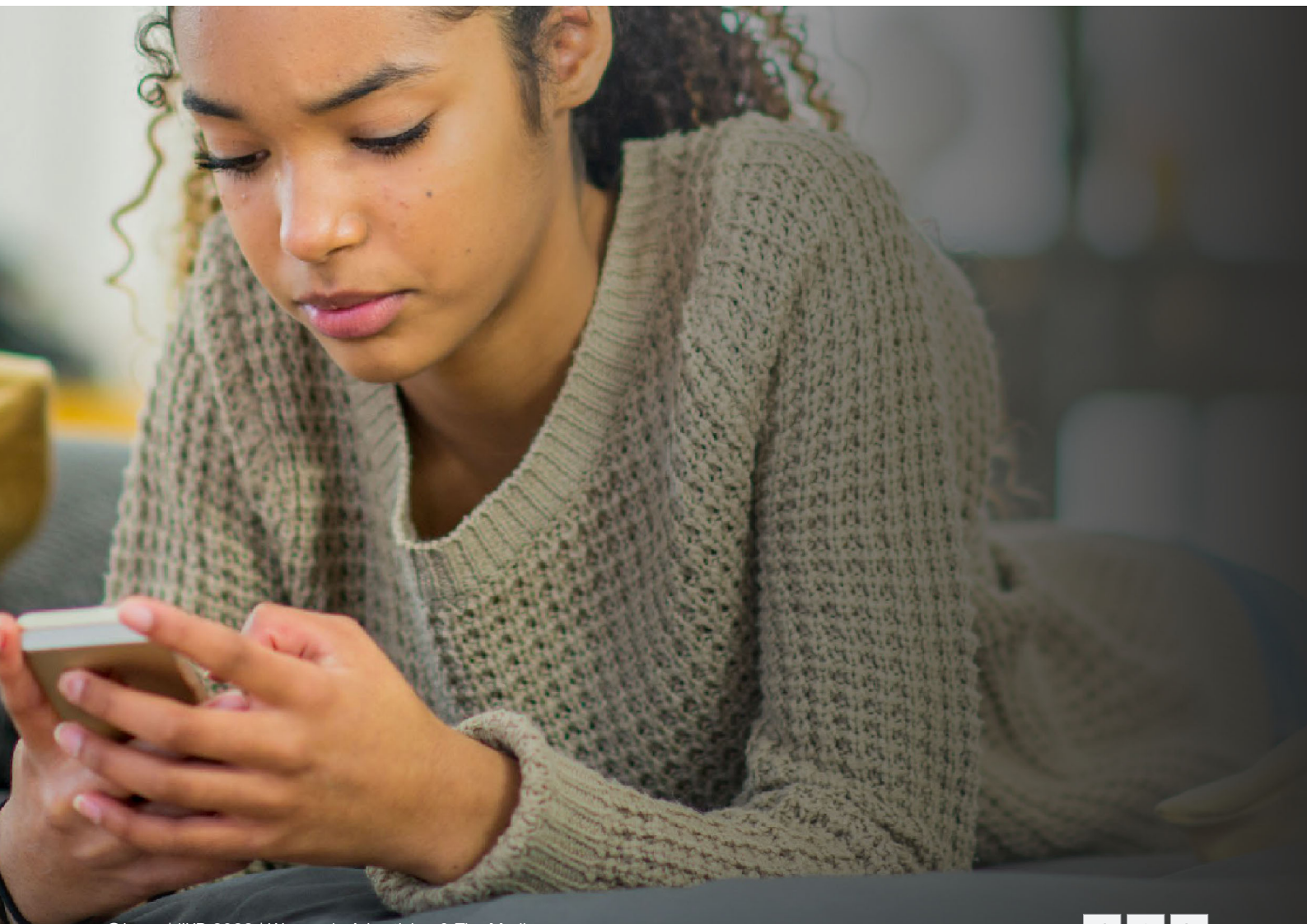
Shifting the Social Norm

Women began to crack the glass ceiling as society saw an increase in the number of women who became leaders in government, key political figures, Fortune 500 CEO's, professional athletes, and military leaders. There was a shift in the film industry in 2019 as the number of women working in this industry hit a historic high. However, men still outnumbered women four to one in key roles[5].

This helped start a shift in our social norms but 51% of US adults agree that advertisements and commercials often keep men and women in their traditional gender roles[6]. So, there is much more progress to be made. Three in four (76%) of people agree that advertising has the power to shape how people see each other[7]. With the importance people place on advertising, it is vital that brands and marketers take responsibility to represent women in a modern, positive manner to further shift our social norms as we strive for gender equality.

But beyond doing the right thing for society, is there a benefit from shifting the portrayal of women in advertising for brands in terms of creative effects? Can brands, while doing good for society, simultaneously improve their business outcomes? Do brands benefit from this idea? More specifically, do we see any short-term or long-term impact when ads positively portray women in advertising to further echo the importance of shifting our social norms to drive gender equality?

To help answer these questions, and be a vital part of the SeeHer movement to improve gender representation in advertising, Ipsos, with advice from The Female Quotient (The FQ), started to include Gender Equality Measure® (GEM®) questions in all creative assessment research projects when an ad includes a female.

"76% of people agree that advertising has the power to shape how people see each other."

Ipsos Inclusion of GEM®

The Association of National Advertisers (ANA) launched the SeeHer movement in partnership with The FQ in 2016.

SeeHer's mission is to accurately portray all women and girls in marketing, advertising, media and entertainment so they see themselves as they truly are and in all their potential.

To quantify results, they spearheaded the development of GEM®, the first data-driven methodology to identify gender bias in media. This methodology is widely considered the gold standard for measuring gender equality in advertising and media. The global, open-source industry measurement has been used to address gender bias in 160,000 + ads, representing 87% of worldwide ad spend[8].

The GEM® question measures four key characteristics of women in the advertisement:

PRESENTATION –
Opinion of how the female character(s) is/are being presented

RESPECTFUL –
If female character(s) is/are shown in a respectful manner

APPROPRIATE –
If female character(s) is/are presented in an appropriate manner
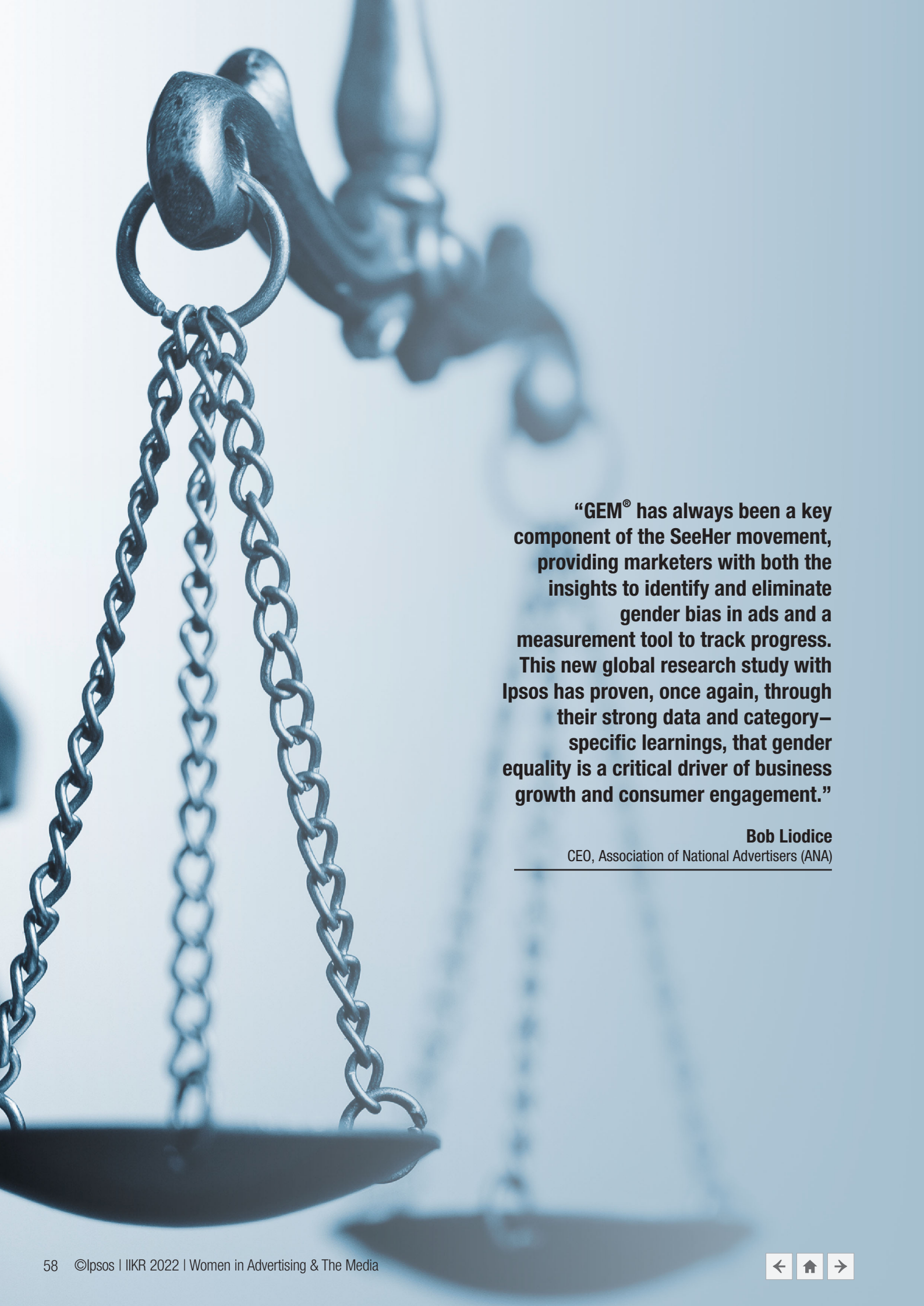
ROLE MODEL –
If female character(s) is/are viewed as a positive role model

"We know that there is power in positive representation. Since its creation, GEM® testing has been instrumental in promoting the accurate portrayal of women and girls in advertising. We are confident that this research will inspire more advertisers across the industry to feature women and girls as they truly are."

Shelley Zalis
CEO, The Female Quotient and Co—Founder, SeeHer

"GEM® has always been a key component of the SeeHer movement, providing marketers with both the insights to identify and eliminate gender bias in ads and a measurement tool to track progress. This new global research study with Ipsos has proven, once again, through their strong data and category—specific learnings, that gender equality is a critical driver of business growth and consumer engagement."

Bob Liodice
CEO, Association of National Advertisers (ANA)

What Ipsos Did in The Research

To generate the GEM® Index, each characteristic is benchmarked against the average score for that characteristic. Then each characteristic's score is indexed versus the average. The GEM® Index is the average of the four indexes giving equal weight to each input and an index of 100 signifies an average female gender score for an ad.

In this paper, Ipsos aims to better understand if brands will benefit when positive and modern female gender representation is evident in the advertising. The research does this by exploring how GEM® intersects with key performance metrics such as Brand Attention, Choice Intent and Long-Term Brand Relationship.

Ipsos' Brand Attention score measures the ad's ability to capture attention while correctly linking the brand back to the ad. Choice Intent helps us understand the impact the ad had on short-term behavior change or intention for choosing the brand at the point of purchase. Brand Relationship measures the net effect of the ad on perception that the brand meets functional and emotional needs, suggesting it is a good long-term choice.

When a female was present in the ad, Ipsos collected data using the GEM® question across 1,994 ads in 10 countries (United States, United Kingdom, Brazil, Canada, France, Germany, Italy, Japan, Russia and Poland). This data set included a wide range of nine different categories: Baby Care; Beverages; Durable Goods; Grooming/Cosmetics; Healthcare/Pharma; Home Care; Food; Pet Care and Services, as well as various ad lengths and formats. The respondents in the data set are males and females ranging in age from 18 to 65. To evaluate the data set we split the GEM® Index scores into tertiles. By looking at the data set split among those that fall in the top third of the GEM® index (106 or higher) versus those that fall in the bottom third of the GEM® Index (95 or less) we identified several key themes and relationships to answer the question we posed.

What We Learned

Three Key Findings:

1. When advertisements positively portray women, there is an increased likelihood to have a positive impact on long-term Brand Relationship as well as short-term behavior change.

2. The role and portrayal of women in advertising can influence attitudes towards the evaluation of an ad.

3. There are category-specific lessons to be learned about positive female portrayal in advertising.

The following section outlines these findings in more detail and identifies considerations for brands when portraying females in their advertising.

When advertisements positively portray women, there is an increased likelihood of a positive impact on long–term Brand Relationship as well as short–term behavior change.

Regardless of where the ad falls on GEM®, we do not Observe a relationship for Brand Attention. Meaning, the way in which a female character is presented in the ad doesn't impact the likelihood the ad will be encoded in memory and correctly linked to the brand. We do, however, see the impact occurring more on the behavioral measures of Choice Intent and Brand Relationship. These are the metrics that help to get the brand chosen more often and make respondents feel better about the brand.

With women spending over $31.8 trillion globally[9], it is important to make sure advertisements are speaking to women and present them in a positive and respectful manner. Ads with high GEM® are 20% more likely to score high on Choice Impact having an effect with male and female consumers at the point of purchase. But since women often have greater responsibility than men for household purchases, this can have a big impact on business outcomes.

While it is important for advertisers to be focused on the short-term goal in creating desired changes with behavior, they also need to make sure they are cultivating long-term brand relationships. Ads that score high on GEM® are 35% more likely to score high on the Brand Relationship index. This is an opportunity for brands to improve how consumers feel towards their brand in the long-term. There is a positive effect for the brand when ads portray women in a positive manner as we see a strong relationship between GEM® and Brand Relationship. It's a win-win scenario: by doing what is right for society in their advertising, brands increase the chance to gain creative effects.

**The role and portrayal of women in advertising can influence attitudes towards the evaluation of an ad.**

When brands positively portray women in their ads, attitudes toward the ads begin to become more positive.

Ads that score higher on GEM® most notably also score higher on these specific ad ratings: for people like me, is informative, fits the way I feel about the brand and is believable. While ads that are in the bottom third of GEM® score below the norm on these specific ratings. This shows us that the way women are represented in advertising has a relationship towards the perception of the creative, more specifically a more positive representation of women is linked to a more positive perception of the creative.

Other ad ratings such as stirs my emotions, told me something new and makes me think this brand is different from other brands show smaller differences between those ads in the top versus the bottom GEM®. However, higher GEM® scores are driving the other ad ratings at a greater rate than these.

Conversely, ad ratings such as entertainment, unique and is an ad people will talk about – aren't influenced by the way the women were represented in the advertisements. These ratings do not offer any point of differentiation or movement by the female portrayal in the advertisement. These ad ratings tend to help us understand what may be driving our attention measures which we know now is not influenced by GEM®.

Figure 1 Top third performing GEM® cases likelihood to place in top third of Ipsos database on key measures

● Top third GEM®

| Brand Attention | Choice Intent | Brand Relationship |
| 3% | 20% | 35% |
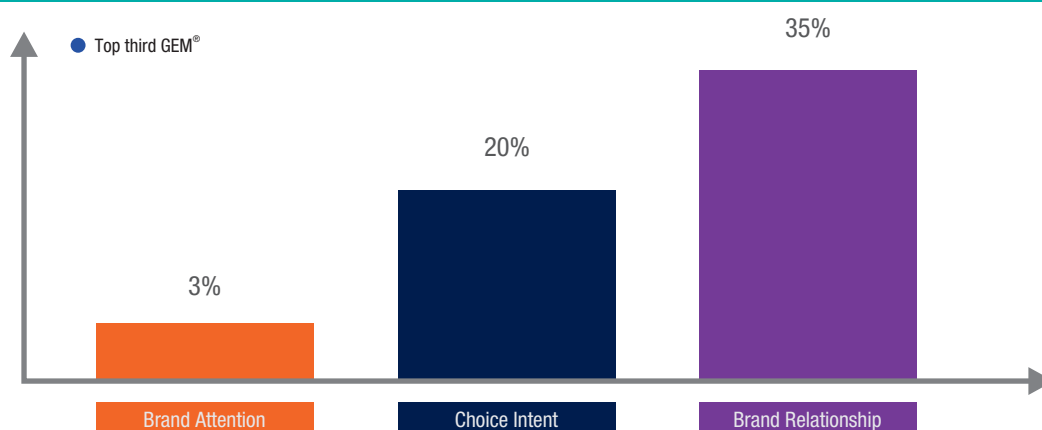
Source: Ipsos database of 1,994 ads in GEM® analysis

Ads with high GEM® are more likely to be considered as relevant, brand differentiating, and reflect the world around the people brands are looking to influence. Lack of uniqueness, controversy, and general entertainment of the creative experience does not influence GEM® (see Figure 2).

There are lessons to be learned in certain categories based on the depiction of women in advertising.

Women purchase over 50% of traditional male products including automobiles, home improvement products and consumer electronics[10]. This fact made us wonder how categories that typically target towards females compare to categories that typically target towards males in terms of their portrayal of women in advertising. Our data set consists of nine categories: Baby Care; Beverages; Durable Goods; Grooming/Cosmetics; Healthcare/ Pharma; Home Care; Food; Pet Care and Services. To better understand this, we looked at the distribution of GEM® among each tertile (see Figure 3) and the four characteristics (presentation, respect, appropriate and role model) that feed into GEM® (See Figure 4).

Figure 2 Top third performing GEM® cases likelihood to place in top third of Ipsos database on key measures
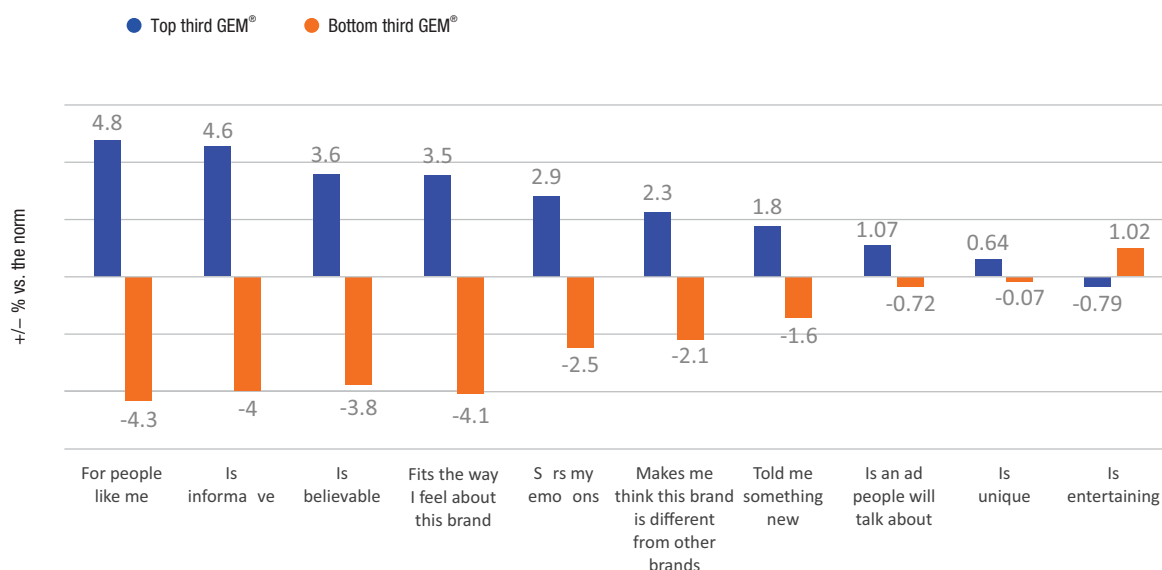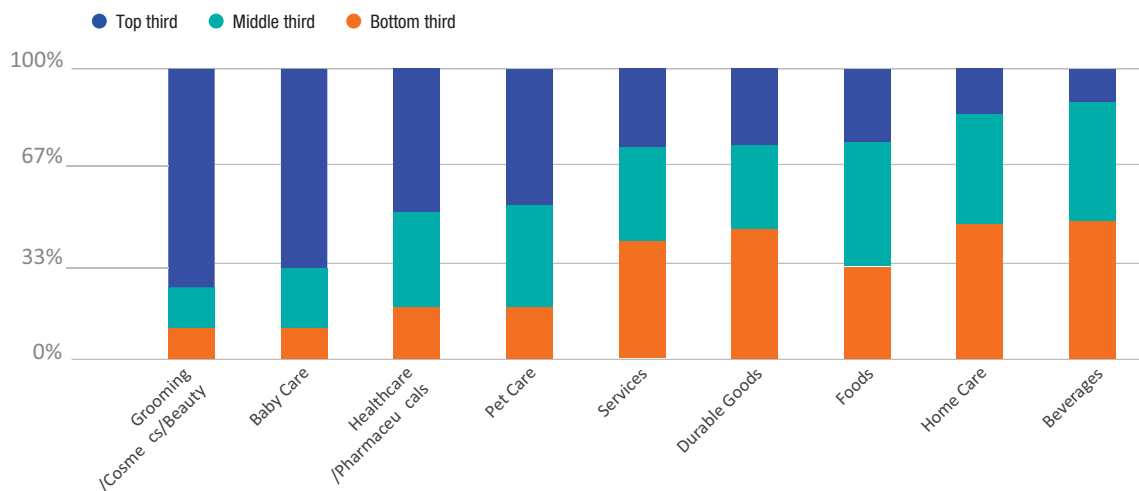
● Top third GEM® ● Bottom third GEM®

Measure	Top third	Bottom third
For people like me	4.8	-4.3
Is informative	4.6	-4
Is believable	3.6	-3.8
Fits the way I feel about this brand	3.5	-4.1
Stirs my emotions	2.9	-2.5
Makes me think this brand is different from other brands	2.3	-2.1
Told me something new	1.8	-1.6
Is an ad people will talk about	1.07	-0.72
Is unique	0.64	-0.07
Is entertaining	-0.79	1.02

+/– % vs. the norm

Figure 3 GEM® tertile distribution by category

● Top third ● Middle third ● Bottom third

Categories (left to right): Grooming/Cosmetics/Beauty; Baby Care; Healthcare/Pharmaceuticals; Pet Care; Services; Durable Goods; Foods; Home Care; Beverages

Source: Ipsos database of 1,994 ads in GEM® analysis

Traditional female targeted categories have the highest proportion of ads in the top third of GEM® scores. This could be due to the fact their products and advertisements are inherently targeted for women and, therefore, are more in touch with how women want to see themselves.

Traditionally, male targeted categories are focused more on their gender needs and wants. Regardless, traditional male categories need to consider how they use and portray female consumers in advertising, given females often make the purchasing decisions.

For Grooming/Cosmetics (feminine products, hair color, lotion, makeup, toothpaste) and Baby Care (diapers, formula), two traditional female targeted categories, we discovered these categories have the most ads that fall in the top tertile for GEM®. On average, ads in these two Categories score higher on role model and presentation in terms of the characteristics that make up GEM®.

Dove *Real Beauty campaign*

The Dove Real Beauty campaign, which presented "real women" in its advertising has proven to be a real game changer for the company and society. Dove increased its sales by 62% since the campaign launched in 2004[11]. But more importantly the brand has been messaging to girls for years that true beauty comes from within and to love their body image as everyone is beautiful in their own way. This reinforces the notion that brands can both do right for society and improve sales.

"This ad addresses a bias we have in our society that only men drink beer while women drink more "delicate" beverages.."

Heineken Cheers to all

For traditional male targeted categories such as Durable Goods (cars, shavers, electronics, and home appliances), Services (banks, financial, credit cards, retail) and Beverages (beer, soda, water and coffee,) most ads are falling into the bottom third of GEM® scores. In the Beverage category, of the four GEM® characteristics, role model scored lower than the other components in the overall index scores on average. This may be because in the Beverage category we tend to see the female characters play a secondary role. Recognizing this creates an opportunity for brands to find better ways to connect with female consumers by placing the women in leading roles. In return, this will help improve attitudes towards the evaluation of the ad and, therefore, the brand in the long-term. The Heineken ad "Cheers to all" is a great example of how the beer category can begin to make changes to break down outdated stereotypes about men and women's alcoholic beverage of choice. This ad addresses A bias we have in our society that only men drink beer while women drink more "delicate" beverages. It offers the opportunity to change minds, perceptions and bias that are heavily engrained in our social norms.

Heineken Cheers to all
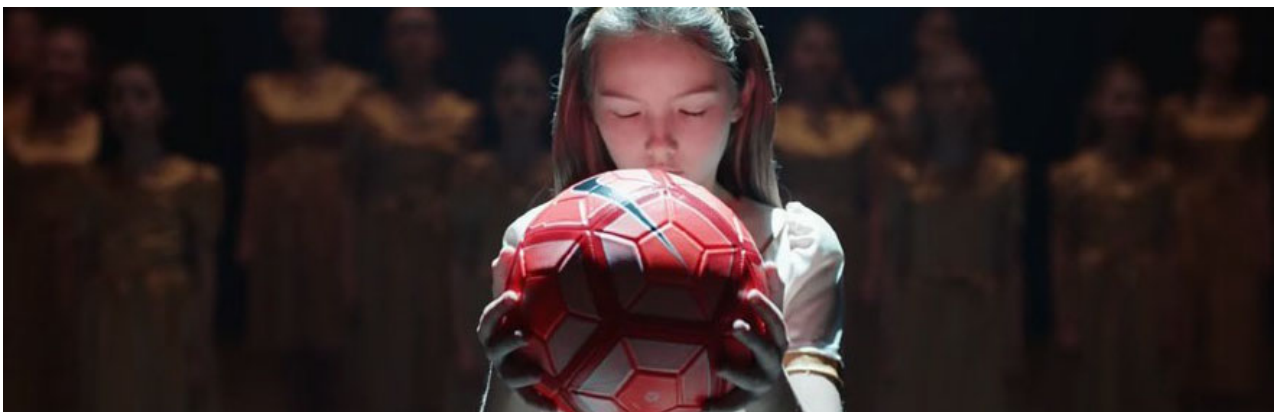
Another example of an ad trying to change perceptions comes from a Nike campaign in Russia "What are girls made of?" which added a modern twist to a well-known Russian children's song. The traditional Russian song said girls were made of "flowers" and "gossip", neither of which inspired girls to be confident, independent or strong. This campaign is a great example of taking outdated thoughts from the past and flipping the script completely to show women they are just as strong, tough, confident and determined as anyone else pushing for gender equality.

Figure 4 Index score for each GEM® characteristic by category

Legend: ● Role Model ● Appropriate ● Respect ● Presentation
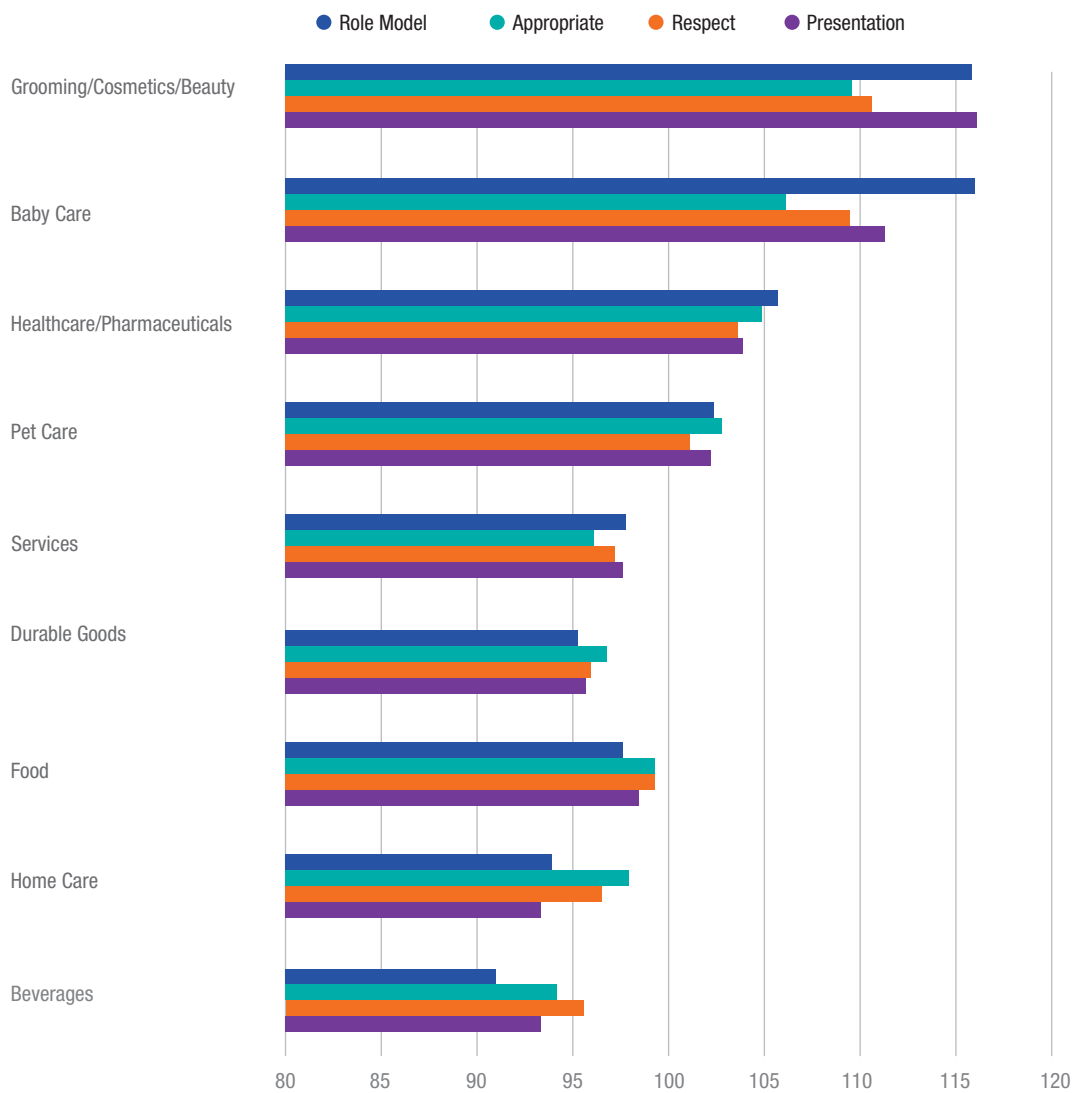
Source: Ipsos database of 1,994 ads in GEM® analysis
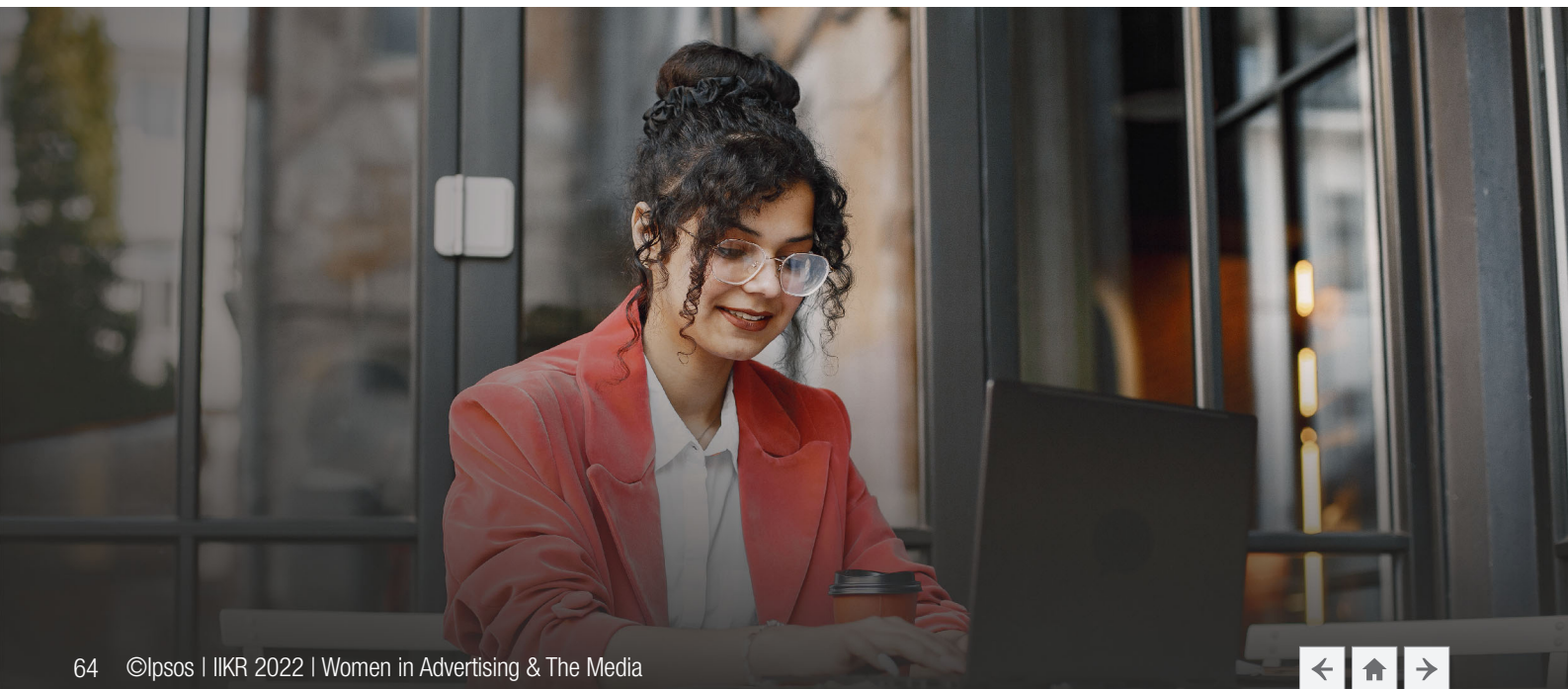
Conclusion

To help shift our social norms and drive gender equality, we need advertising and media to play a role now by positively reflecting women in advertisements, movies, streaming content and television entertainment. Not only will this improve our society for the better, but brands will also see positive business outcomes. With this analysis we have been able to understand how ads that represent females in a more positive way have a higher long-term and short-term impact for their brands. This indicates that the portrayal of women in advertising will influence attitudes towards the evaluation of the creative and the overall feelings towards the brand. While some categories are doing better than others, in terms of how women are being depicted in advertising, there is still progress to be made to ensure all women are

"Brands have the power to drive change in our society, and we see in the data that doing good for society is also linked to doing good for brand growth.."

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BRINGING IN LGBTQ+ AUDIENCE FOR BRAND GROWTH

By Neha Dutta & Pallavi Mathur Lal

Inclusivity as a progressive concept for evolved societies is gathering steam across all areas. In this article, we are examining the benefits that brands can tap into by addressing and targeting the LGBTQ+ community and the potential this holds.

The LGBTQ+ community holds a worth of approximately USD 4.6 trillion, across the world. Though there are no official demographics for India, as per the GOI figures in 2012, 2.5 million people were accounted as homosexual in India. Globally, this community has been in the news and their inclusion in various field is a topic with polarized opinions among most. In many countries this community has been recognized and they are living with more freedom and easy access to products and services. In India too, there is an increased move towards acceptance, especially after the landmark 2018 judgement decriminalizing homosexuality.

Only 2% of urban Indians currently identify themselves as 'other than male or female' – transgender or non-binary, according to the LGBTQ+ Pride 2021 Global Survey by Ipsos. Globally, 4% of GenZ's, leading in count, and 2 % of Millennials identify this way.

Media's Role in Normalisation

Media is contributing significantly in a move towards normalizing people and relationships with the LGBTQ+ community.

Over the years we have witnessed a rise in acceptance of content portraying LGBTQ+ community, in media (specifically OTT content), advertising and in business activism.

For some years, corporates have been working to make their cultures more inclusive – their internal policies and practices, for example, are changing in now noticeable ways. For corporates and brands, this is an important step - to be seen as progressive with inclusive human resource practices and company culture. Many multinationals as well as local giants in India have senior position and functions dedicated to diversity and inclusivity. They aim to propogate a more tolerant and inclusive environment at work and are involved in setting up new practices to support the community. In fact, 58% of urban Indians support workplaces which actively support and promote equality for LGBTQ+.

Media is where the dynamic aspects of inclusion are most evident. 55% of the urban Indians support portrayal of LGBTQ+ in media, in the past few years, and there is evidence of brands also showcasing inclusivity in their

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advertising and communication. We have seen a clear movement, from the LGBTQ+ community being portrayed as outcasts to the sidelines to the current presence and acceptance of their roles being more central – but normalization is still long way ahead. There are many examples from the recent past, which have been captured here to showcase this movement in inclusivity.

- Featuring the lives of Aman (Jitendra Kumar) and Kartik (Ayushmann Khurrana), two men in love, the

Only 2% of urban Indians currently identify themselves as 'other than male or female' – transgender or non-binary, according to the LGBTQ+ Pride 2021 Global Survey by Ipsos.

movie Shubh Mangal Zyada Saavdhan (2020) tells of their struggle to convince their families to accept the relationship. It highlights the different opinions and views each character has on the inherent tensions between coming out, traditional customs, and values in society.

- The TV series Four More Shots Please on Amazon Prime set in the cosmopolitan city of Mumbai, is the first female-led project by Amazon in India resembling Sex and the City. It brings to the table subjects such as transgender, bisexuality, along with several others.

- The movie Badhaai Do (2022) starring Bhumi Pednekar and Rajkumar Rao cast light on the issues of living their lives with same sex partners in secret under the guise of a socially acceptable heteronormative marriage. It also addresses the issue of adoption rights for same-sex couples.

- Chandigarh Kare Aashiqui (2021) attempted to start the conversation on humane and positive trans representation, while highlighting the stereotypes within the society and how to challenge them.

Media and advertising both reflect social mindsets and we know the reverse to be true too. The above examples are all indications of progressive thought and inclusivity. While most of these portrayals might be directed to an urban audience, these have also trickle down to a suburban and rural populous. We are likely to see increased acceptance levels in urban centers in India. In fact, 59% urban Indians support the LGBTQ+ community and are supportive of them being open about their identities.

Brands and Societal Progressions

A Brand's growth is dependent on how the brand connects with its consumers. With more inclusive messaging, they can represent an expanding target audience, and their expanding set of attitudes and acceptances.

Brand Purpose has become an important pillar for brands. In the recent Ipsos Global Trends Survey in India (2021) the digitally connected urban Indian population expressed that the brands should be more ethically and socially responsible. It is becoming increasingly important for brands to stand for

'substance', beyond product quality and other factors. More than anything, consumers in India, especially the younger age group (Gen Zs) and even the millennials want to see progress and thus endorse brands that take a solid stance on social causes – support of the LGBTQ+ community being one of them.

Hence, when targeting and messaging is taking place keeping today's youth in mind the brands must be vigilant that the youth today is far more accepting of homosexuality compared to older generations.

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Support for LGBTQ+ from Some Sectors

The hospitality sector is already garnering support for their inclusivity and the safe spaces offered for LGBTQ+. There are several food establishments (restaurants, cafes, bakeries etc.) that are open across Tier 1 and Tier 2 cities (Mumbai, Delhi, Pune, Hyderabad, to name a few), which maintain and promote an Open To All policy. Le Flamington, Kitty Su, People Choice Café are some examples. Several hotels and resorts, examples Andaz (Hyatt) and The Lalit in Delhi, Hilton in Mumbai, smaller enterprises such as Birdcage Boutique in Uttarakhand, Mister and Arthouse B&B in Delhi, The Banyan Soul in Goa, have advertised a stance of open to LGBTQ+ populous.

The beauty sector too has seen a proliferation of influencers from LGBTQ+ community. Influencers like Deep Pathare, Rahil Sayed, and Shantanu Dhope are creating great content and are taking over Instagram. While they currently use conventionally available make-up, this does open-up possibilities to a space for creating beauty products especially suited to more types of skin apart from feminine. In fact, there are many brands, globally, which have started to leverage on the same - JVN, Flower Beauty (also available in India), Peace Out are a few such. On e-commerce platforms like Etsy, users can find beauty products and accessories if they search for 'Lesbian Beauty' or 'LGBT Beauty' in India. Though very nascent, in some beauty stores, the beauty advisors are from the LGBTQ+ community.

These sectors are catering to the needs of the LGBTQ+ and creating a business segment. The LGBTQ+ have the financial resources, are looking for products and brands to address their needs and provide to them the inclusivity and safety that can help them be themselves.

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Authenticity is King!

While we are seeing progress, Brands need to be authentic in their stance and support to the cause and community.

The transparency of the internet and social media means consumers and citizens have ways of digging out whether a brand is true to their word or are just spreading lip service. Company websites, posts on LinkedIn and Glassdoor, other social media posts on company culture, influencers' viewpoints – all of these can be located and dug into. Thus, brands that are not authentic can adversely run into viral effects. The best suggested way is for a brand to showcase the true ways in which they service the cause and how the purpose runs through their business systems.

The task of taking this inclusivity further to capture the brand growth is up to marketers and advertisers. In the long run authenticity is what consumers will connect with - a purpose for a brand that supports the cause, genuine representation of the LGBTQ+ community, normalization of roles and characters, and delivery of products honestly created for them.

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Implications

1) Product and Services Innovation – As the community is more recognized and the numbers grow, making products and services that appeal to LGBTQ+ and those that radiate an all-inclusive appeal will offer higher opportunities for a brand

2) Internal Policy for Businesses – Corporate policies are becoming more inclusive, but an all-inclusive social attitude and culture is still needed to make the community feel safe and freely to be public with their identity. Allies are a big support.

3) Inclusive Marketing – Communicate with caution: Brands today need to communicate in an inclusive manner. One where the depiction is appropriate and neither underplayed not exaggerated.

4) More visibility in Media: As the societal acceptance increases, the world will get to see lot more portrayals of characters from the LGBTQ+ community in mainstream cinema which will act as the catalysts towards normalization in the years to come.

Corporate policies are becoming more inclusive, but an all-inclusive social attitude and culture is still needed to make the community feel safe and freely to be public with their identity. Allies are a big support.

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EMPATHY AWAKENED

THE POWER OF AN EMPATHETIC ORGANISATION

By April Jeffries

The article talks about the power of empathy for a marketing organization - purposeful, action-driven empathy. The author presents a four step framework to build an empathetic organization which emphasizes on the need of a strong intention and a strategic, commits to an "always on" approach of consistent efforts bring out the impactful insights.

Introduction

In the midst of constant change, the right research can help to provide more reliable strategic direction as we realise that the people we serve have had to reroute their lives and have rebounded into a new position. Many of the absolutes we had come to know are no longer stable and many of yesterday's solutions are obsolete.

Researchers need two key capabilities to begin to fully understand the changing world and the people in it:

1. We need to stay at the forefront of how we harness the power of data and digitisation, leveraging all of the data available to identify changes in behaviour and shifts in performance. But to better understand what's behind the data and peek at what is emerging, requires an additional step;

2. We need to develop a strong sense of Empathy to look underneath into the real-life experience and deeper motivations and emotions. In other words, to know the

things people care about, the things that upset them, the things that touch them, the things that make them take notice, and why? Now is the time to rediscover the people we serve – who they are and who they are becoming, what drives them, what frustrates them, and how best to delight them by providing for their developing needs.

Empathy is essential. Not the purely emotional kind but one that includes purposeful action and delivery. Action without empathy is meaningless, and empathy without action is directionless and soft. As a powerful tool for growing businesses, brands and organisations, empathy requires a complete circuit – from your head (the business question), to your heart (the people question), to your gut (intuitive understanding), and to your hands and feet (motivated action). In fact, empathy is anything but a passive emotional response to another's circumstance. It is a powerful instrument for supporting each other and it is physically rooted in who we are.

Case Study: Emma

Emma is a 32-year-old African American female. Brands who seriously want to talk to her, need to recognise and appreciate her unique challenges. Here is what the data tells us: there are 21.7million black women in the US alone and they spend nearly nine times more than their non-black counterparts on hair and beauty products[1]. Emma is willing to pay more for quality items than her non-black counterparts, is more likely to purchase brands that support a cause she cares about and is 20% more likely to say she will pay extra for a product that is "consistent with the image she wants to convey".

It doesn't take long to build a business case for capturing share within this target audience and, through appropriate data analysis, identifying where they are and what they are doing. In the past two years, due to the Covid-19 pandemic, Emma has changed, and we need to try to understand her like a best friend. To address her needs, she cannot be a stranger.

Empathy for a black woman's hair care routine and needs requires an understanding of her "hairstory" and through a series of qualitative empathy-based exercises, we realise it cannot be separated from her overall experience. This includes deep emotional anchors that constantly influence her, like experiences of racism, colorism, self-esteem, self-love, parenting, self-expression, imposed definitions, and standards of beauty. And without the empathy required to understand those nuances, a brand can never adequately serve her. Her functional needs are specific, but we also found her emotional aspirations and barriers are completely different than her white counterparts. According to years of qualitative research, Emma's hair is a political statement, an expression of social identity, and even represents entrepreneurship and profitability in her community.

Emma's story is an example of how applying an empathetic lens transforms an insight from a detached observation that will produce predictable solutions to one that meets not only her functional needs but also her emotional needs, making her feel heard, valued, and understood.

What started as an investigation of functional benefits of hair care products, became a much deeper exercise. A reckoning that begged the exploration not only of product performance but also brand promise and authenticity, an avoidance of unintended offense, and renewed potential to gain her respect and loyalty.

Now is the time to rediscover the people we serve – who they are and who they are becoming, what drives them, what frustrates them, and how best to delight them by providing for their developing needs.

Applying an Empathetic Lens

Empathy of this kind is developed on three levels:

1. Listen: Deep listening and courageous conversations are the entry point to developing the empathetic lens. Allowing for silence, asking unscripted questions for free-flowing conversation and deeper answers, and probing for examples and stories that illustrate what may be difficult to articulate, are all ways to start peeling back the layers. Frequency and consistency builds connection and with time an intuitive gut will develop.

2. Observe: Principles of ethnography take observation into account and highlight the "say versus do" gap. Recognising contradictions, noticing real versus claimed behaviours and beliefs, and perceiving social dynamic shifts in the presence of others are all critical in understanding real people in real life.

3. Experience: To the extent that we can genuinely live with the ideas, realities and limitations of others, we can get close to what it feels like to live someone else's experience.

Applying an empathetic lens transforms an insight from a detached observation that will produce predictable solutions to one that meets not only functional needs but also emotional needs.

Return on Empathy

An Ipsos poll conducted in May 2020 found that Americans see it as more important (following the start of the pandemic) for businesses to demonstrate empathetic qualities and show an understanding of customers as people[2]. The same study revealed nine in ten Americans continue to think that brands need to show empathy with actions and not just words, and 86% believe that showing empathy is critical to creating greater loyalty. The top five ways consumers say brands can be empathetic are; treating people with respect (52%), treating people like human beings (50%), listening to people (43%), caring about people (41%), and acknowledging when the brand is wrong (37%).

Corporate reputation that includes a broader sense of empathy – social justice or environmental commitments, for example – are strong considerations for purchase decisions especially among Millennials and Gen Z. In fact,

56% of Gen Z say they are more likely to purchase something from a company that took a stand on racial justice[3].

From the perspective of businesses themselves, a recent study found 84% of CEO's and 70% of employees believe empathy drives better business outcomes[4]. They are sensing the need for their teams to be "closer to their audience", recognising it as a fuel for innovation, and supporting the design of new products and services that address emerging needs and create new habits and behaviours.

Employees increasingly expect empathy in their workplaces and leaders see it positively linked to employee wellbeing, motivation, productivity, retention, engagement, team collaboration, reduced stress, increased morale, less burn out, and more inclusive attitudes at work.

Building a Culture of Empathy

Creating a culture of empathy within an organisation where "connection with others beyond yourself" is a habit. It requires ongoing effort, is driven by agreed values, and embedded within the daily workings of the organisation. A genuine assessment of the organisation will help to set appropriate goals for improvement. Simple questions using Behavioural Science as a foundation allows for the examination of the factors driving behaviour and behaviour change within an organisation. These principles can not only show us the "why?" but also the "so what?" and the "what now?".

- Motivation: How motivated is your organisation to change behaviour to a more consumer-centric commitment? Are the benefits widely recognised and translated to daily business language? Is there confidence around what it means and an opportunity for people to receive guidance and feedback without risk?

- Ability: Do your teams have the skill and capabilities to be more empathetic? Is it timely, relevant, experiential? Are there programmes to help develop habits of empathy? Are they embedded in your daily routines?

- Processing: How much work does it take to be people-focused in your organisation? How automatic is it for your teams to answer any strategic question with the people they serve in mind?

- Physical: Is the physical setting conducive to an "always on" representation of real people in real life?

- Social: Do the organisational norms and values support a human focus? Is empathy part of the values held by the organisation?

The most effective empathy programme addresses these questions and commits to an "always on" approach of consistent efforts.

Corporate reputation that includes a broader sense of empathy – social justice Or environmental commitments, for example – are strong considerations for purchase decisions, especially among Millennials and Gen Z.

Four–step Framework to building an Empathetic Organisation

A holistic and ongoing approach is key. Empathy is not a one-time training or singular conversation. It requires strong intention and focus to move through to meaningful insights. The following four-step framework helps to build an empathetic organisation:

1. Build Empathy Muscle: Keeping in mind that creating a culture is no small task, positioning it as a critical "movement" within an organisation is key. This period of cultural shape-shifting starts with training to build the necessary skills to get the most out of conversations, observations and sensory experiences. Measure and track improvement over time.

2. Connect Consistently: Empathy is far from a one-time engagement. Apply your empathy muscle to connect with real people, in real life, on a regular basis. Find the people who can best represent the target audience and decide on the ideal way to connect with them with the right frequency. We have learned so much about virtual connections and missed so much about face-to-face relationship building. Virtual interactions happen in natural environments, but you are limited in what you are allowed to see. On the other hand, in-person interactions provide broader observational opportunities but what's gained in context can be offset by planned responses at scheduled times of the day. Moving forward, we need to consider hybrid approaches and be intentional about how to best connect given the ultimate research objective.

3. Move to Action: Now is the time to do what you do best – add value! Bring the thinking, access and resources of your organisation to the forefront and use them to address real problems. Convert empathy experiences into tensions and implications to be answered by business solutions. Create human-centric ideas backed up with a detailed plan for action.

4. Develop an Empathy Ecosystem: Retaining learnings and enabling them to be shared throughout the business is key to getting maximum value from your programme. Find ways to capture and retain knowledge to organise and make sense of the time you have spent. Tap into your organisations knowledge management platform to manage digital assets and socialise what you have learned throughout the company. This will avoid repetitive learning and inspire a creative feedback loop through collaboration and collective knowledge.

Effective empathy takes you out of your world and into the world of another to see and experience the tensions that inform relevant insights and decisive action.
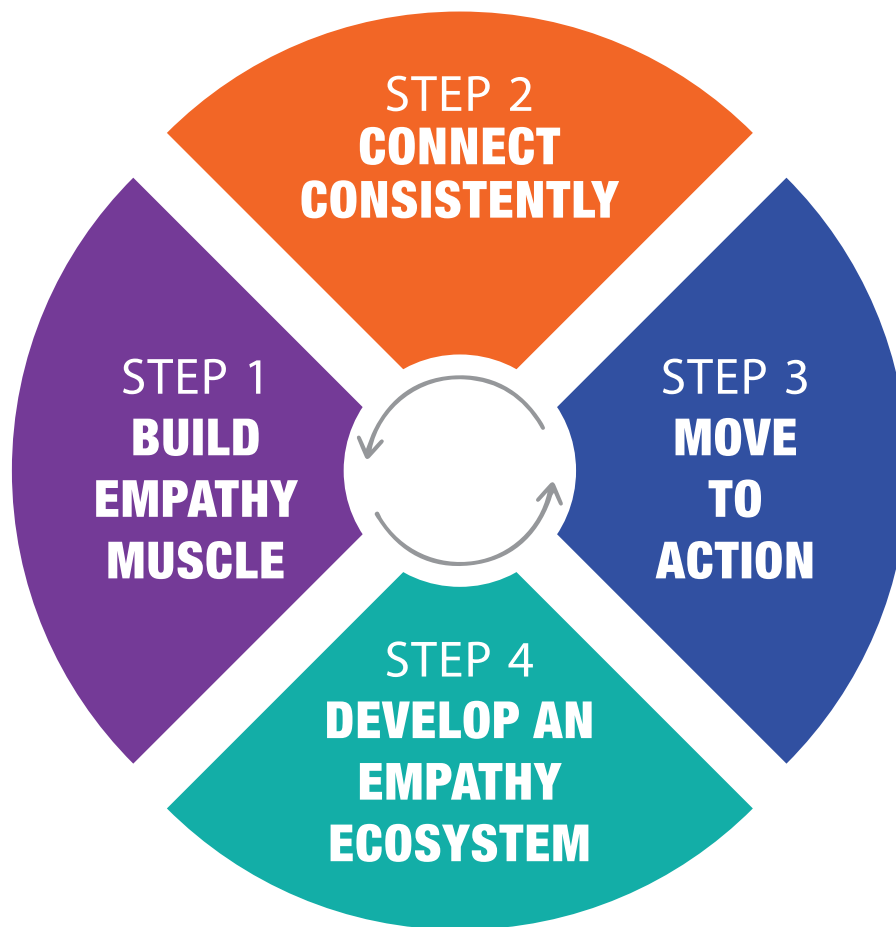
Source: Ipsos

Conclusion

Consider this empathy framework when applied to our initial example of Emma, the 32-year-old African American woman, and her hair care routine. Rather than trying to force fit Emma's experience into a general market brand, the best way to reach her may be through a new brand focused specifically on not just her functional needs but how her "hairstory" has impacted her total experience.

Being stuck in our limited worlds makes it easy to project our own feelings on others and make leaps of faith that may or may not be appropriate. A plan rooted in empathy will play out not only in innovation development and communication language and messaging, but in package design and colors, promotional focus, and decisions tied to the organisation's purpose including assessment of risk and community investment.

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Further Listening

- Ipsos KEYS webinar recording: "In Search of Empathy"
https://www.ipsos.com/en/search-empathy

- Insight Out: An Ipsos UU podcast
https://www.ipsos.com/en/insight-out-ipsos-uu-podcast

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FOSTERING AN INCLUSIVE CULTURE AT WORKPLACE – WHAT WE CAN DO (BETTER)?

By Balaji Pandiaraj & Gauri Pathak

This article covers the aspect that the community of today has a strong need to acknowledges the presence, relevance and potential of extended gender. Workplace and work culture are epicenters where these reforms can be triggered and hence their responsibility is spotlighted here.

An inclusive workplace is one that makes everyone feel important and supported relevant regardless of their identity. This means, irrespective of one's gender, race, caste, sexual orientation, appearance, everyone has an equal opportunity. Utopia, won't you agree?. Certainly not.

A few months ago, I met up with many of my batchmates, some of them after a span of about 20 years, at our MBA batch reunion. A batch of pass outs from college from the late nineties, we were a bunch of ambitious youth aiming to make it big in the corporate world. As we were sharing our experiences over the past 20 years on who was doing what and where, I mentioned that I had spent most of my years in research and consulting. One of my male classmates promptly commented "as a woman you had to choose between career ambition and family – good choice". The excitement, the food, the ambience, and the joy of reminiscing memories with friends muted the significance of the comment for the moment but it soon resurfaced in my thoughts and promoted some questions:

- Do people view agency jobs as more suitable for women, as there is better work life balance – lesser travel and better work culture?

- Is there a general belief that women will always need to choose between work and life, which in turn points to the larger issue of inclusion at work – will she be undermined at work if she chooses life?

Answers to these questions emphasize the value of an inclusive culture at workplace.

Gender Inclusion

Gender inclusion has strong prospects as it leads to higher economic prosperity. As per recent data, women account for only ~20% of the total labor force in India[1]. The onslaught of Covid-19 pandemic shook the economy and thus the recruitment rates, this further exacerbated the unemployment rates among women. Women are notably underrepresented across sectors, including infrastructure; sectors such as oil and gas (7%); automotive (10%); pharmaceutical and healthcare (11%); and information technology (28%)[2]. Based on numbers from 2019, only 3.7% of CEOs and Managing Directors of NSE-listed companies were women, an improvement of merely 0.5% from what was observed in 2014.

Apart from the socio-cultural norms, which have scripted a virtual can and cannot do list for women, there are several other factors that discouraged the participation of women in the workforce. In such a scenario where women do not grow as fast as their male counterparts in their professions due to bias, a disparity in pay adds fuel to the fire.

An inclusive workplace is one that makes everyone feel important and supported relevant regardless of their identity. This means, irrespective of one's gender, race, caste, sexual orientation, appearance, everyone has an equal opportunity.

A structured inclusion and diversity program is one: way among many, in which companies can ensure equal representation. This can be achieved by maintaining a uniform regulatory standard for transparency of data shared across employees, to make them feel equally inclusive. The scenario could stimulate better representation of women across different levels and better pay parity.

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The Advantages of Gender-diverse Teams
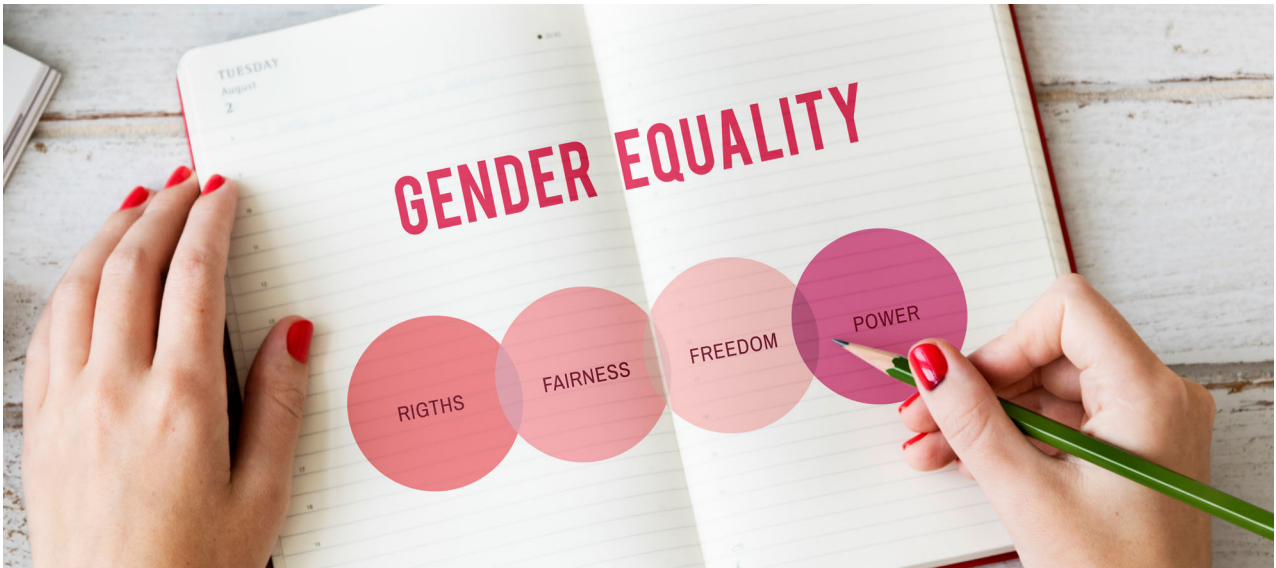
Many researches across the globe show that gender-diverse teams perform better than single-gender teams for several reasons:

- Men and women have different viewpoints, perspectives, ideas, and market insights, which enables better problem solving, ultimately leading to superior performance at the business unit level.

- Fosters a culture of inclusion where employees feel respected, represented as well as their perspectives and contributions valued.

- Gender diversity helps companies attract and retain talented women. This is especially relevant as more women join the labor force around the world. Companies cannot afford to ignore 50% of the potential workforce and expect to be competitive in the global economy.

For these reasons and others, it makes sense for businesses to make gender diversity a priority.

As per recent data, women account for only ~20% of the total labor force in India.

LGBTQ+ Inclusion

In recent times, there has been a slow but sure shift in the acceptance of LGBTQ+ segment, thanks to both legal and cultural revisions. 2018 was a landmark year with the ruling of supreme court on Section 377 which led to a fundamental shift in the rights of India's LGBTQ+ citizens and necessitated policy changes across the board.

A 2021 study by global HR Consulting firm Randstad India in association with Women's Web identified that only 9% of surveyed organizations feel that 'significant' efforts have been made for LGBTQ+ inclusion in India Inc. This underscores the need for more conversation as well as action in the corridors of corporate India.

As societies become more and more accepting of people with diverse sexual orientations, the LGBTQ+ segment of the population is gaining a stronger footing and will soon become an integral part of both the work force and the consumer community.

LGBTQ+ inclusion starts with educating people about the different definitions within the community in the first place. Companies need to have policies around making their workplace LGBTQ+ friendly. This can be done by being more "open" about the fact that the organization gives equal opportunities to people in this segment.

Providing training about specific inclusive behaviors towards the LGBTQ+ community can help avoid any unintentional or intentional bias. Creating a network of LGBTQ+ employees across geographies is a great way to foster an inclusive culture.

Actively recruiting LGBTQ+ employees and creating formal systems of inclusion will ensure that LGBTQ+ members are made a part of the workforce.

As workplaces become more inclusive, individuals can also play a role in building this inclusive culture. Becoming an advocate for LGBTQ+ issues and calling out discriminatory behavior, within or outside the organization, thereby becoming an ally in the true sense.

The benefits to an LGBTQ+ inclusive workplace extend beyond that of making sure employees of all sexualities and gender expressions feel safe and valued, though this is the primary reason. LGBTQ+ inclusive workplaces benefit businesses too in terms of productivity and profitability.

So, having robust inclusion strategies in place for LGBTQ+ staff make sense from a business perspective as well as an ethical standpoint. This is because all employees will feel less stressed and more productive as respected members of a cohesive team.

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A Mindset Change
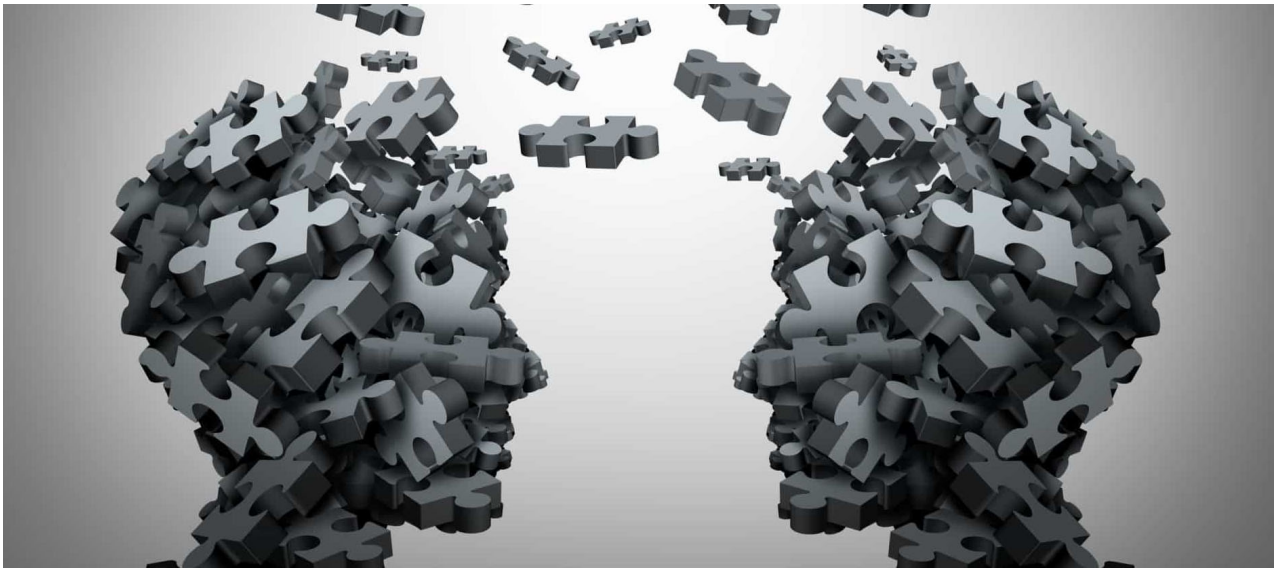
To conclude, there are clear steps that corporates need to take to open up offices and make them safe places where all can contribute and feel valued. Key points this article wants to end with are below.

Inclusivity is not a policy, it is a mindset, it is a culture. Till the people and the leadership do not believe in the vitality of an inclusive culture, it cannot be successfully cultivated.

Promoting and educating inclusive behaviors via training people, measuring and monitoring the effectiveness of both trainings and policies on a regular basis and refining or revising them if and when seen necessary is essential for its success. This will sensitize people to the importance of being inclusive towards everyone at a workplace and guide them to make decisions which ensure equal participation.

A program or policy would need to distinguish cultural myths from credible research to design and implement solutions that create diversity in the workplace and increase organizational performance.

It will be crucial for any inclusivity and diversity initiative to examine potential barriers to both diversity and inclusion and design solutions to overcome those obstacles.

What should Organizations Do

Gender-diverse and engaged business units outperform those that are less diverse and less engaged. Managers not only need to increase gender diversity in business units but also create workplaces that engage employees. Open, trusting, and supportive relationships among coworkers and supervisors unleash the power of diversity by enabling employees to turn their differences in thought, behavior, skills, knowledge, and talent into innovative ideas and practices that can drive a company forward.

Secondly, gender diversity varies substantially across business units within a company, which in turn affects the business performance of these units. To achieve the real benefits that diversity can bring, leaders and managers must look carefully at the gender balance in specific business units when designing and implementing a strategy to increase diversity. A blanket policy designed to increase overall gender diversity at a company, for example, is unlikely to achieve the desired results or to increase financial performance

1. Review your policies for inclusive workplace and make gender diversity business priority

Having policies in the workplace is crucial for setting the guidelines on how to be more inclusive and avoid discrimination. Inclusiveness should be a core part of Equality and Diversity policy. Also, make sure all policies are inclusive, for example policies on parental leave, adoption, and pensions.

Making gender diversity a business priority can lead to financial benefits and help a company realize its full potential. To reap the benefits that diversity can bring, business leaders must:

- Identify business units that are less gender diverse.

- Develop a hiring strategy that increases gender diversity in these units without reducing or ignoring merit. For example, studies indicate that when women feel they are hired to fill quotas, it negatively affects relationships between co-workers.

- Create an engaged culture that enables men and women to form trusting relationships and motivates them to perform at a high level.

- Set inclusiveness goals, and hold managers accountable for diversity.

Inclusion stimulates productivity and growth. Learn to recognize and remove barriers in order to design a diverse workforce and inclusive workplace

2. Provide Training and Appoint LGBTQ+ allies

Offering LGBTQ+ training in the workplace as part of equality and diversity training can be a powerful way to educate everyone about LGBTQ+ issues. Training helps ensure policies are heard and understood across the organisation

Are there non–LGBTQ+ people in the workplace who are passionate about or interested in LGBTQ+ rights? Get them onboard as an LGBTQ+ ally; they can champion LGBTQ+ inclusion in the workplace and act as a source of support for LGBTQ+ staff.

3. Incorporate gender–neutral language

Gender-neutral language avoids bias towards a particular gender. Using 'they' instead of 'he/she' in contracts and other company documentation is a good step towards this, as is monitoring ongoing communications for gender-neutrality.

This is a new world of possibilities and is evolving as we speak. It is time for everyone to join in and create it per our imagination. A workplace that is inclusive is a workplace that is complete.

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THE OPPORTUNITY WITH GEN X+

By Pragya Jain and Saiteja Pamu

The article helps spotlight the growing segment of the Gen X+ who have the disposable incomes and propensity now. In the future this segment will become stronger and marketers will need to address them and across sectors and categories.

India is often seen as a young nation, and it is. However, over the coming years, this demographics is going to shift significantly and we all need to be prepared for these changes. It is projected that by 2050 the old age population number is going to be doubled i.e., around 19.5% of the population (about 319 million) would be aged over 60 years. The 45+ age group is on the rise, and along with it are anticipated changes in demographics, socio-economic and living conditions. Traditionally, brands and market research firms have focussed on younger generations who are in their 20s and 30s, looking at their purchasing power and willingness to buy brands, experiment, be digitally savyy and so on.

Given the fact that India's demographic is slowly changing, there is higher percentage of people in the age group of 45-60 years old - The Gen X+ - compared to a decade ago. The current Gen X+ working in corporate jobs and having relatively higher disposable income, are a good target group for the brands and marketers already. Working in insights and consumer behaviour, we know their needs are relatively different from young people. This is the generation who would prefer to spend on products to make their lives simpler and comfortable

unlike people in their 20s or 30s. The current Gen X+ who will become affluent elderly, are huge segments to be captured not only for today but for the future as well and their product developers should also pay attention to this group considering various factors such as their disposable income, needs, etc. This calls for actions to fill this gap with customized products.

In this article, we are going to discuss the market opportunities in this age segment in various sectors such as healthcare, senior living spaces, tourism, and pets. However, this is not an exhaustive list. We will primarily be focusing on the Gen X+ throughout the article but also acknowledge the potential and implications of moving towards elderly age group as well.

It is projected that by 2050 the old age population number is going to be doubled i.e., around 19.5% of the population (about 319 million) would be aged over 60 years.

Living Spaces

A pan India study done recently by Ipsos India for HelpAge India brought some interesting insights and shed light on active and comfortable ageing. The study was conducted to understand overall issues that elderly face and any aspirations that they might have. In this study it was found that around 59% of the elderly felt they are not getting to spend enough time with their family despite living with them. This is leading to loneliness for which elderly are exploring ways to fill this gap.

With such changing patterns in family dynamics, a lot of Gen X are exploring the idea of investing in living independently and are exploring the options for spaces created keeping their needs in mind. In tandem with the rising population of senior citizens and better affordability, developers venturing into senior living spaces are also on the rise because of the realisation of the potential of this segment. The senior living market in India is expected to register a CAGR of more than 4% during 2018-2027.

A pan India study done recently by Ipsos India for HelpAge India brought some interesting insights and shed light on active and comfortable ageing.

Southern cities account for a major share of the senior living market in the country, followed by the west and north regions. For post-retirement settlement Bengaluru, Chennai, Puducherry, and Hyderabad are the most preferred southern cities; in north; Delhi-NCR, Chandigarh, and Dehradun are popular areas to settle, and Mumbai, Pune, Ahmedabad, Panaji, and Surat in west India . A few of the front runners in this segment are Tata Housing, Antara Senior Living (Max India Group), Ashiana Housing, Silverglades, Paranjape Schemes, Adani Realty and Brigade. Senior living market in India is fragmented and highly competitive without any dominant players.

Affordability and the range of facilities and services provided play a crucial role in success of senior living projects. These projects require special attention on elderly needs such as wheelchair availability, grab rails, anti-skid flooring, etc. It is also important to cater to their basic needs such as provisional and medical stores within the premises for easy access. To keep the elderly engaged, developers are also ensuring services such as libraries, trainers and spaces for meditation and yoga etc. Apart from these, the developers must ensure that health care related services are easy to access. So, most of the developers are trying to make sure of the availability of primary health services for minor issues, regular check-ups within the premises, physiotherapy and having

With such changing patterns in family dynamics, a lot of Gen X+ are exploring the idea of investing in living independently and are exploring the options for spaces created keeping their needs in mind.

collaborations with hospitals in their vicinity to provide emergency services. All these are important criteria for Seniors now and Gen X+ in the future to choose and invest in the property they want to live in after retirement. The demands from senior housing will only increase as teh current Gen X+ invests and looks at the longer term.

Tourism

According to the World Tourism Organization, more than 593 million global travellers were aged 60 plus years and accounted for nearly 1/3rd of vacationing spending. This number is projected to reach 2 billion trips annually by 2050. With enough money and time at their disposal with an empty nest, many Gen X+ and elderly who are in their pre and post retirement stages, would look forward to travel and explore the world.

The travel wishlist and experiences for Gen X+ may be quite different as compared to the Millennials or Gen Z.

They may have already travelled to regular locations and may want to explore some offbeat ones that offer peace and quiet for example. They may have different factors impacting their decisions like health issues and some of this segment might also be looking for customized tourism packages. However, they often do not find tours and packages according to their needs. Companies could address these specific needs through curating customized packages and give excellent tourism experiences to this segment of population.

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Animal Companions

Having an animal companion or a pet can provide mental and physical well-being for all the age groups. For this segment having a pet can mean more, especially who are living independently with an empty nest, in providing companionship, security, etc.

Studies have shown that pet ownership and regular contact with pets are associated with better cognitive status than not owning a pet or not having regular contact. Although this is independent of age, but pet ownership is less likely in older adults and one of the reasons cited was pet care . Apart from providing animal companions, many other products and services centred around this idea can be developed for this population segment to make such companionship feasible. Companies can capture this potential market with products such as automatic feeders and waterers, self-cleaning litter boxes, pet treadmills, treat dispensing toys, etc. A few of such products are PetSafe Smart Feed Automatic Pet Feeder for Cat and Dogs, PetSafe Drinkwell, Littermaid single cat self-cleaning litterbox, Nox-gear Light Hound, dogPACER miniPACER Treadmill, Wobble Wag Giggle Ball, PetSafe Slimcat Feeder Ball, etc.

Advertisements only for Gen Z?

Advertisements are made in such a way that it represents the consumers a particular brand is targeting, and as we have been discussing majority of the advertisements feature youngsters despite almost all products being used by Gen X+ and elderly as well. There have been attempts by brands to feature Gen X+ and elderly in their advertisements, such as WhatsApp, Flipkart, PhonePe, Amazon and Colgate etc but this representation is still not up to the potential of this segment.

"There is a demand for a range of products in this segment, but not many brands are addressing them. Also, brands must look beyond the intuitive categories like healthcare and allied services.", said Ashwini Sirsikar, Country Service Line Leader, Ipsos UU (Qualitative Research), Ipsos India. *"There is an opportunity for brands in other categories to target the elderly segment such as beauty and wellness, apparel etc., given the spending capacity of upper–class senior citizens"* she added.

Healthcare and Everyday Tasks

One of the critical areas for this segment is healthcare. Although a lot of research and investment has gone into understanding the treatment of the diseases which trouble this age group, there is a lot which can be explored. Here, technology can be of great use in assisting them to ensure their healthcare needs are met. Gen X believes in living independently and with minimal support using technology, their lives can be made easier keeping their future needs in mind.

Brands have developed and promoted devices and systems such as smart wearables, healthcare management apps that could perform tasks like tracking the dietary needs, physical activities, body functions, reminding of medicine timings, etc. A lot can be tapped into as per this segment needs for today and future.

Conclusion

The Gen X+ Segment is growing significantly as an overall percentage of India's population, and with a lot of ex-white collared workers having significant disposable income, companies can tap this growing market by developing products factoring their needs and tastes.

Gen X+ today wants to explore and enjoy the world and have a convenient lifestyle. With some research investment for this segment, brands and marketers can open a box of opportunities for themselves for the future. They also need to start doing this now.

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WORKING TOWARDS DIGITAL EQUITY FOR A BETTER TOMORROW

By Kedar Patgaonkar & Preetie Kotur

From a macro standpoint, accessibility to internet, driven by infrastructure or cost-related limitations, appears to be causing the first level of divide in the digital world, and is a primary challenge to digital equity. The authors put forth a view on how this equity gap should be closed and also cite examples on how this is already happening.

The Benefits Technology Brings…

Digital transformation has become the hallmark of almost every industry, especially realised in the period of the pandemic. On the positive front, internet and smartphones have changed the way we shop, pay our bills, learn, maintain our relationships or even monitor our health. Innovations in frontier technologies like AI, IoT, blockchain, biotech, nanotech, robotics signal a tremendous potential to invite more extreme transformation in the years to come. From healthcare to agriculture to education or finance, every sector is being ushered into this new world created by the digital dimension.

These are indeed very exciting times. Driverless cars, quantum computers, robotic surgeries, smart walls with

VR and AR and the advent of 5G all promise to accommodate extensive connectivity and even heavier data traffic. Practically, every device can be connected for data exchanges. Apparently, 5G will set the premise for an intelligent and connected environment and extend beyond just smartphones. 2022, it is said, will be a critical year where companies will introduce 5G+ innovations for superior consumer experiences to enrich everyday lives.

So, Where Lies the Disconnect?

From this vantage point, it is impossible to imagine a world without the internet. The Internet forms the backbone of our modern connected information society. However, it is also true that as of April 2022, over a third of the world is still offline, not having ever experienced the internet, forget leveraging its many benefits.

According to Statista, the global internet penetration rate is 62.5 percent, with Northern Europe ranking first with a 98 percent internet penetration rate among the population followed by UAE, Denmark, and Ireland. At the opposite end of the spectrum is North Korea with virtually no online usage penetration among the general population. China, US & India have the highest number of internet users, but large populations of India and China are still offline.

In short, from a macro standpoint, accessibility to internet, driven by infrastructure or cost-related limitations, appears to be causing the first level of divide in the digital world, and is a primary challenge to digital equity.

Digital equity can be described as a state or condition where every individual and all communities have equal access and opportunity to use information and communication technology for full participation in modern society.

Innovations in frontier technologies like AI, IoT, blockchain, biotech, nanotech, robotics signal a tremendous potential to invite more extreme transformation in the years to come.

But Internet Accessibility Alone is not a Factor

Another barrier that commonly exists amongst citizens of developed and developing countries, more acutely amongst the latter, stem from a basic inability or lack of knowledge and skills to use the technology. This barrier requires equal attention and deeper understanding if the battle of attaining digital equity is to be won. It is also a factor that the corporate world may want to be ever mindful of.

In the March 8, 2022 edition of MIT Technology Review, where it is acknowledged that access to technology isn't the same for everyone, 'Unconditional inclusivity' was discussed with Janice Zdankus, who is the vice president of strategy and planning and innovation for social impact at Hewlett Packard Enterprise. According to Zdankus, challenges to digital equity could stem from shortcomings in one or all of these contributing factors -

major gaps in data accessibility, underrepresentation within tech organizations, and bias within the technology itself. Most of these can be addressed if a strategy for digital *equity* transformation and not just digital transformation is imagined and systematically worked towards.

From a macro standpoint, accessibility to internet, driven by infrastructure or cost-related limitations, appears to be causing the first level of divide in the digital world, and is a primary challenge to digital equity.

A New kind of Conversation…

Well, we happen to be at a stage where the world's data is growing at the edge, while the resources or the environment to demystify this conundrum are still being investigated, discovered, built. Companies and the government alike, are trying to figure out what they could do with the mountain of data that gets collected every instant. In such an unsettling milieu, technology could be a double-edged sword for consumers.

Their future would depend on the vision created and the decisions taken today. It would depend on the collaborative effort of governments, business leaders, innovators, and the society. And, befitting the hallmark of

a fair and equitable society, it is expected that leadership on these fronts in the tech industry as well as its collaborators would ultimately solve the challenge of digital divide and ensure that the technology is made to work for all, without discrimination. Technology should be viewed as a means to the end if digital equity is the goal.

Unless the legislation and the society are able to keep up with the pace of technological advancement, there is a good chance that the digital divide will only increase further, and many will feel overwhelmed or simply get left behind. This is especially true of the developing economies.

India

India, with its increased focus on Digital India and AI and a 1.3 billion population, half of which has no access to the internet, has work lined up. As per the Ipsos-Global Trends Survey 2021, both A Divided World' and 'Reactions to Uncertainty and Inequalities come up as critical themes in India, indicating that the country is in a state of churn, caused by divisions of varying origins - those digitally connected versus not digitally connected besides geographies and gender. With its nominal per capita income, over 60 times lower than the richest country, it is imperative that for India to become digitally inclusive, the deployed technology ought to be one that is affordable and relevant to the masses here.

In line with this digital vision and the goal to eliminate digital divide by 2023, the recently announced Union Budget 2022-23 was heavily loaded with technology-aided development plans and investment in diverse verticals such as infrastructure, fintech, education and healthcare. The budget introduced measures ranging from taxation to investment to help boost the country's economic activities, digital governance, ease of doing business, ensuring job creation and skill development, thereby demonstrating India's commitment to transition into an inclusive digital economy.

One can't deny that technology has improved access to previously unbanked sections of the country. Government schemes like the Pradhan Mantri Jan Dhan Yojana; Aadhaar, and UPI have resulted in over 90 percent of India's 1.3 billion population getting an Aadhar identity in the last few years. Now the India stack, termed as the digital wonder that is revolutionizing the country's financial infrastructure is widening its presence. It is an ambitious government initiative to move the economy towards presence-less, paperless, and cashless service delivery. Having access to digital platforms can help people in India even in the remotest corners of the country adopt technology easily and bridge the intellectual divide that exists in the country.

Digital equity can be described as a state or condition where every individual and all communities have equal access and opportunity to use information and communication technology for full participation in modern society.

Tech4Good, Tech4All - Charting the Roadmap to Digital Inclusion

What is clearly evident is that technology can be a friend or a foe, a boon to some and a bane to others simply determined by fate and where one is born. While it has tremendous potential to act as a leveller, still, in the wrong hands or exclusive access only to privileged folks (be it citizens or governments or companies) it might create an undesirable situation of unfair control and exploitation, leading to undesirable societal and economic impact.

Therefore, while thinking of digital equity, deeper and long-term traits of corporate identity such as culture or purpose need to be scrutinized and challenged. As Zdankus puts it - You really need to stretch your thinking and away from just the immediate product you're creating next quarter and selling for the rest of the year. It needs to be values-based set of activities that oftentimes can bring goodwill, can bring trust. It leads to new partnerships; it grows new pipelines.

Technology has already run its mile with many advancements that can potentially enhance inclusion but the right prioritization with a clear vision of the futuristic world and society would be an ideal start.

According to Zdankus, challenges to digital equity could stem from shortcomings in one or all of these contributing factors - major gaps in data accessibility, underrepresentation within tech organizations, and bias within the technology itself.

As the Pathways for Prosperity Commission on Technology and Inclusive Development, which is hosted and managed by Oxford University's Blavatnik School of Government notes - "Solutions are not just about shiny technology, but rather about diagnosing and fixing systemic problems first and using technology appropriately."

Unless the legislation and the society are able to keep up with the pace of technological advancement, there is a good chance that the digital divide will only increase further, and many will feel overwhelmed or simply get left behind.

Another barrier that commonly exists amongst citizens of developed and developing countries, more acutely amongst the latter, stem from a basic inability or lack of knowledge and skills to use the technology. This barrier requires equal attention and deeper understanding if the battle of attaining digital equity is to be won.

Examples of specific efforts made by the corporate world towards inclusivity

Big tech companies like Google, Apple, Microsoft are in forefront. Apple has built-in VoiceOver feature which allows people with different abilities including those with low vision to navigate platforms. Google Maps has improved accessibility with help of Audio, visual and contextual clues.

Netflix is rolling out a new feature for Android users, that will let some viewers change the playback speeds of movies and TV shows. Being able to play shows slower (at half speed or three-quarters speed) or faster (at 1.25 or 1.5 speed) is also a boon for blind and deaf viewers.

Some technologists are also mitigating gender role and cultural stereotypes in voice technologies: Google Assistant, for instance, labels voice assistants by colour ("Purple") rather than gender ("British female").

With its nominal per capita income, over 60 times lower than the richest country, it is imperative that for India to become digitally inclusive, the deployed technology ought to be one that is affordable and relevant to the masses here.

Specific efforts in the MR industry

Ensuring data collection from consumers belonging to every strata in the society with no room for technology-driven bias is indeed a challenge for the market research world too. An effective use of technology in order to make the surveys more inclusive is evident when enhanced features that use gamification or pictorial representations are included, as illustrated in the few examples below-

- Floating multi-lingual surveys
- Adding pop-up instructions which provide more explanation about a term
- Including Magnifying Glasses' feature to enable respondent to clearly view images
- Using smileys scale for children
- Online surveys to access the upper elite strata in low income economies etc.

"Solutions are not just about shiny technology, but rather about diagnosing and fixing systemic problems first and using technology appropriately."

In recent roundtable discussion hosted by Ipsos 'Women in tech: Innovation, Inclusion and Insights' one of the panelists shared a brilliant example of what true inclusivity in Tech means. When designing an app for the visually impaired, they had included a visually impaired member in the team, as a participant and not just for validation.

What the organization learnt then, was that in making the app better for people who are visually impaired, they made it better for everybody. This innovation gave them huge advantage in terms of accessibility as well as an award for the design. More importantly, it gave them real meaning of inclusivity. Building relationships with people who are traditionally excluded from the product development process, trusting their knowledge, lived experiences, and perspectives, and using it to direct product strategy and development.

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About the India Knowledge Team

The India Knowledge Team works to curate and promote transversal learnings in the domains of consumer behaviour, market understanding and public opinion. It is run by a team of researchers across different service lines. The team works closely with the Global Ipsos Knowledge Centre to help disseminate the Ipsos points of view in the Indian market.

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