Savanta:

INVESTIGATING INTERSECTIONALITY

Understanding bias, discrimination, and its impact on society

Make Better Decisions

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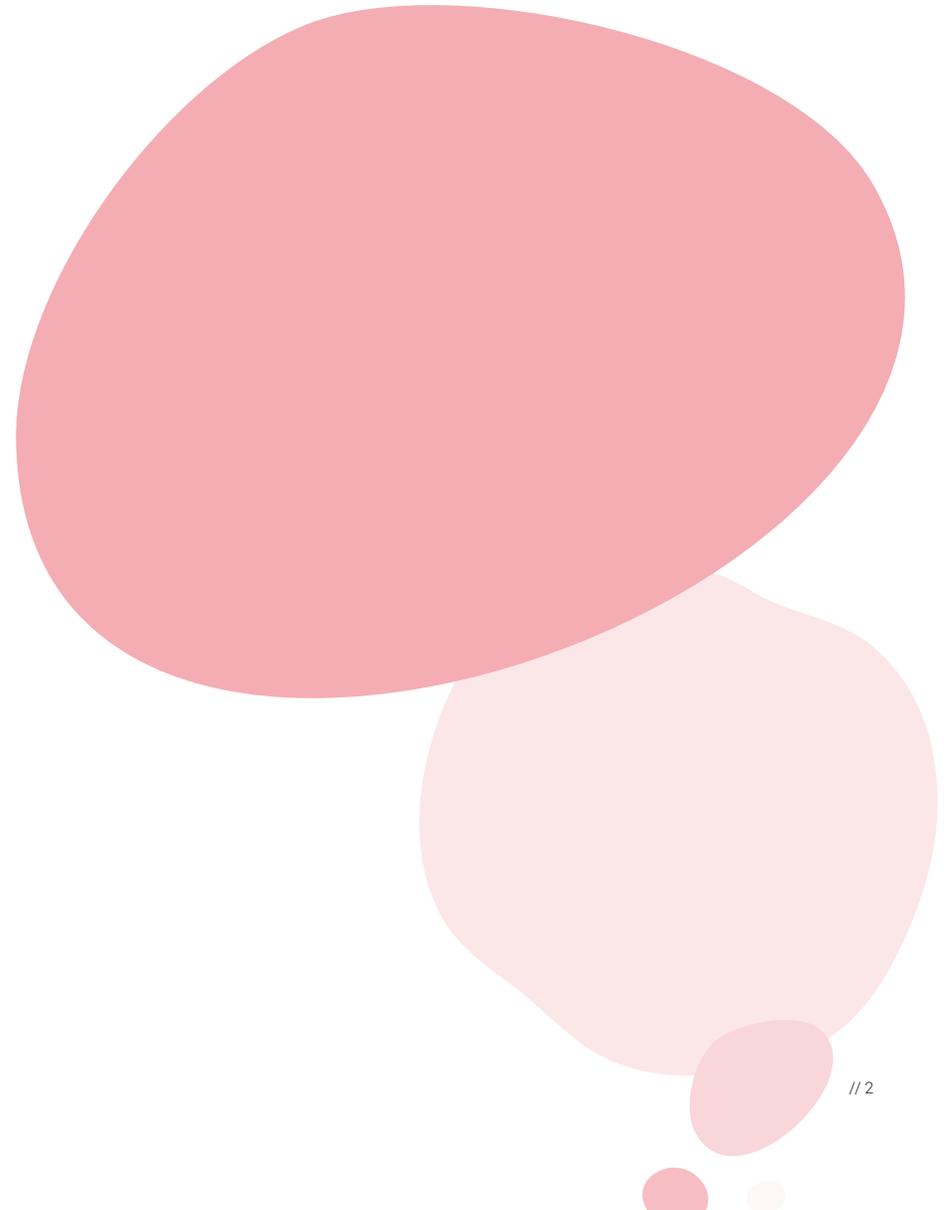
Everything is connected

Society is slowly waking up to the bias and discrimination that infiltrates the day-to-day lives of those from diverse communities. The more we observe the world around us, the more we see the connections and shared experiences of those from different and overlapping under-represented groups. Many voices are louder than one, and from ethnicity to sexuality and gender to religion, different groups are banding together to make themselves heard, increase awareness of the issues they face every day, and drive change, to build a more equitable and inclusive society.

Building on our previous reports, which started after the death of George Floyd, in this 2023 report, we are investigating the experiences of people across the US and Europe, with a focus on under-represented groups and their involvement in society and workplace culture, centering on intersectionality at the core of this report's shift.

This report investigates the views and lived experiences of 4,973 people from the United States, United Kingdom, France, Sweden, Germany, and the Netherlands to identify where the issues lie, how they impact behavior, and what progress is being made to increase diversity, equity, and inclusion. Data based on the BIPOC community stems from the UK and US only.

Savanta's role

Savanta regularly conducts research on key issues and how they impact people and the world around us. Using our strengths in research and data collection, we wanted to create a study on intersectionality – the interconnected nature of social categorizations – to gauge how experiences vary between under-represented groups.

Through our data, we want to highlight the impact that existing social structures and conventions have on different communities and how they might affect opportunities, attitudes, and behavior. We want to make sure that everyone feels heard, and identify some of the barriers people face so that, as a society, we can start to remove them.

Sadia Corey
VP | Client Development

Where do people experience discrimination?

Education

The education system is supposed to give us the building blocks we need to be functional members of society, but 24% say they have experienced discrimination. Discrimination in education can hold people back from achieving their potential and leave them at a disadvantage. Prevalence was particularly high in the Muslim community **(51%)**, and in the BIPOC communities across the UK and US **(41%)**. A particularly concerning statistic given the Supreme Court's recent decision to strike down the affirmative action policies at Harvard and North Carolina.

One in four people personally experienced discrimination when they were in the education system

Healthcare

Access to healthcare is critical for making us feel safe within our communities, but 22% of those surveyed said they had met with problems.

Those in the LGBTQIA+ community are again more likely to have had issues **(32%)**, with 47% of those identifying as transgender, non-binary, or genderqueer experiencing some form of discrimination when it came to accessing healthcare.

One in five people have had difficulty accessing quality healthcare

Financial services

Approximately one in five people have experienced discrimination when it comes to their personal finances – particularly when it comes to borrowing money, such as taking out a loan or mortgage. Being locked out of credit limits the possibility of home or car ownership and even the opportunity to start a business. This increases to 30% within the LGBTQIA+ community.

An even stronger stance can be said for religious groups; An increased perception of financial service difficulty based on forms of discrimination for individuals who identify as Muslim **(43%)**, spiritual people **(37%)**, and other non-Christian religious groups. Evidently, discriminatory patterns when it comes to personal finances means curbing the ability to build generational wealth for entire groups of marginalized folks.

21% have had difficulty accessing financial services because of their identity
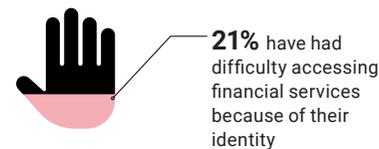
Law enforcement

Nearly one in four people believe they have been stopped by security or police unprovoked as a result of their ethnicity, sexuality, religion, or gender. With this experience, individuals have the potential to feel uncomfortable around those in the community who are there to protect them. This increases to nearly a third **(32%)** of those within the LGBTQIA+ community, and in the US, more than two in five **(44%)** amongst the BIPOC community.

23% have been stopped by law enforcement with no justification because of an aspect of their identity
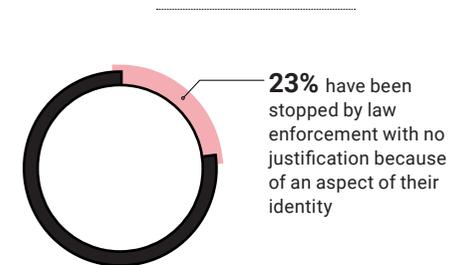
Where do people experience discrimination?

OPINION:

Tania Findlay, Associate Director

Society is going through a lot of change at the moment – with the cost-of-living crisis, inflated energy bills/mortgage rates, and the war in Ukraine dominating the geopolitical climate, just to name a few; none of us can escape the uncertainty of the future.

Adding an additional layer and looking at underrepresented groups, the world becomes even more worrying. Whether it comes to employment, or accessing essential services such as education or healthcare, at least 2 in 5 will face some form of discrimination.

While positive steps are being taken, and we have moved on in recent years, we are still a long way from where we need to be, and it's essential that we all make a positive contribution to remove the bias that people face. We should all be able to feel comfortable leaving the house, going to work, or going out for dinner without being maltreated because of our religion, sexuality, or skin color.

Removing bias is just as crucial for future generations as climate change (for example), and just like climate change, it is one of the few social issues of today that we have some level of control over.

To overcome biases, we must be more aware of their presence, reflect on their nature, and understand how those affect our thoughts, opinions, and actions. Once we bring those biases from our subconscious to the forefront, we can then commit ourselves to implementing practical strategies to counteract these biases and ultimately change our behavior.

Is the workplace a safe space?

We spend around a third of our lives at work, and more companies are focusing on developing an inclusive culture where everyone is seen, heard, and respected. Despite their efforts, it seems that there is still a long way to go as discrimination in the workplace is still relatively common.

Overall, **28%** feel like they have been discriminated against while at work and with a similar number **(29%)** believing that they have been looked over for promotion, or simply not employed in the first place due to their identity. Despite this, two in three **(66%)** remain satisfied with their employer.

However, discrimination appears significantly more prevalent amongst certain groups in the workplace in comparison to other areas of life.

Three in five **(61%)** people who identify as trans, genderqueer, or non-binary have experienced workplace discrimination while nearly half **(48%)** believe they have been overlooked for a promotion or new role. Across the wider LGBTQIA+ community, **42%** agree that they have faced workplace discrimination.

Religion is also an important factor, with half **(50%)** of those coming from non-Christian religions, such as Buddhism, Judaism, Islam, Hinduism, and East Asian folk religions, having experienced discrimination at work. From small things, like celebrating a mix of religious holidays, to larger issues like office bullying, business leaders should be aware and supportive of their teams' religious needs.

In the UK and US, **44%** of people within the BIPOC community agree they have faced discrimination in the workplace, with **46%** agreeing they have been passed over for promotion or not hired for a role due to an aspect of their identity.

Q **Have you experienced discrimination at work due to an aspect of your identity?**

SE // **32%**
NL // **25%**
UK // **22%**
FR // **29%**
DE // **25%**
US // **33%**
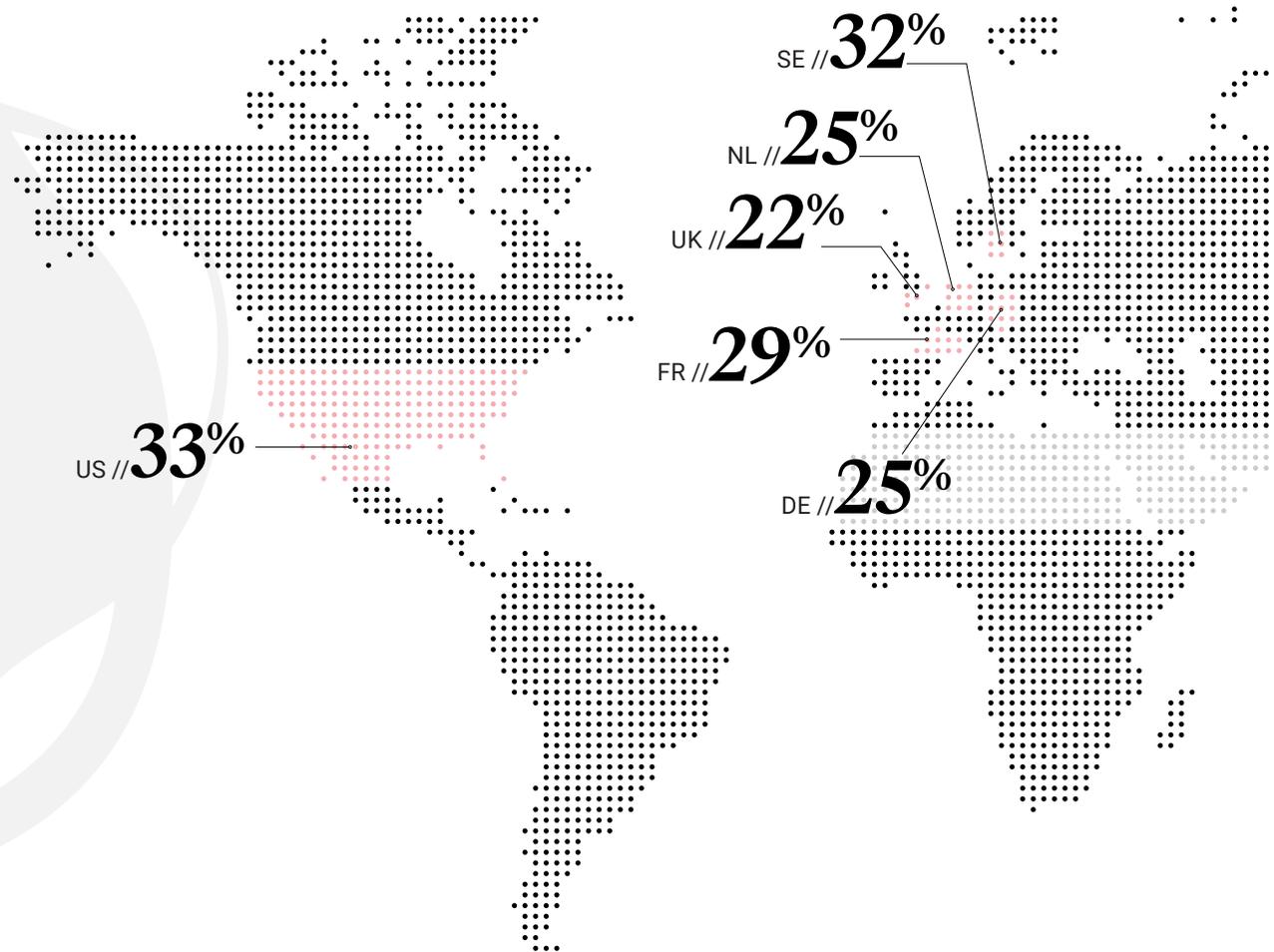
We're in this together

With high inflation affecting economies globally, it is unsurprising that 71% of those surveyed have read or heard about the cost-of-living crisis, with nearly two-thirds (65%) ranking it as one of their top three most important social issues right now.

In the UK, which is experiencing an uncomfortable combination of increasing base rates and high inflation, 84% have heard about it, and 82% rank it as one of the top three most important social issues to them.
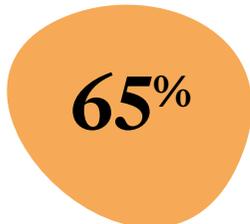
The current geopolitical climate is creating a stir, with war and conflict **(57%)** the second most popular topic of conversation. Countries closer to Ukraine are understandably more aware of or concerned about war than others, with 73% of those in Germany and 69% of those in the Netherlands having read about war and conflict recently.

While these are all issues affecting consumers on a global scale, many countries have their own issues to worry about. In France, more than half **(52%)** of consumers have read or heard about domestic violence recently against a global average of just 35%. The current discourse focuses on several well-known figures who have faced charges recently. The situation has been further exacerbated following the shooting of 17 year old Nahel Merzouk by French police.

In Germany, 72% have heard or read about climate change recently, significantly above the global average of 55%, following policy deadlock and subsequent controversial reforms.

Q **What are the top three most important social issues to consumers right now?**

Cost of living or inflation	War and conflict	Climate change
65%	**32%**	**32%**

Country spotlight: US

In the US, political and ideological shifts have brought a number of issues to the top of the agenda. Gun control is the second most talked about social issue **(65%),** after the cost of living **(67%),** as it remains a highly contentious subject, pitting gun control advocates against those keen to protect their constitutional right to bear arms. Two in five **(40%)** rank it as one of their top three most important social issues.

Since Roe v. Wade was overturned in 2022, there has been a spate of policy changes when it comes to abortion, with each state developing its own laws. With widespread debates about viability, time restrictions and parental safety, 62% of Americans have read or heard about abortion recently, and 25% rank it as one of their top three social concerns currently.

RACISM
& responsibility

Despite the obvious power of the Black Lives Matter movement around the world, along with protests and efforts from governments and businesses to improve racial equity, this research suggests that we have not yet reached a tipping point when it comes to overcoming other societal drivers.

More than half **(53%)** of the people surveyed agree that their country is divided along racial lines, increasing to 69% of people living in the United States. With politics, economics, and many other factors at play, it is important that everyone takes responsibility for closing the divide.

In this section of the report, we look at racism against different communities, where primary responsibility for increasing equity and inclusion rests and the impact of the mainstream media on propagating both positive and negative views.

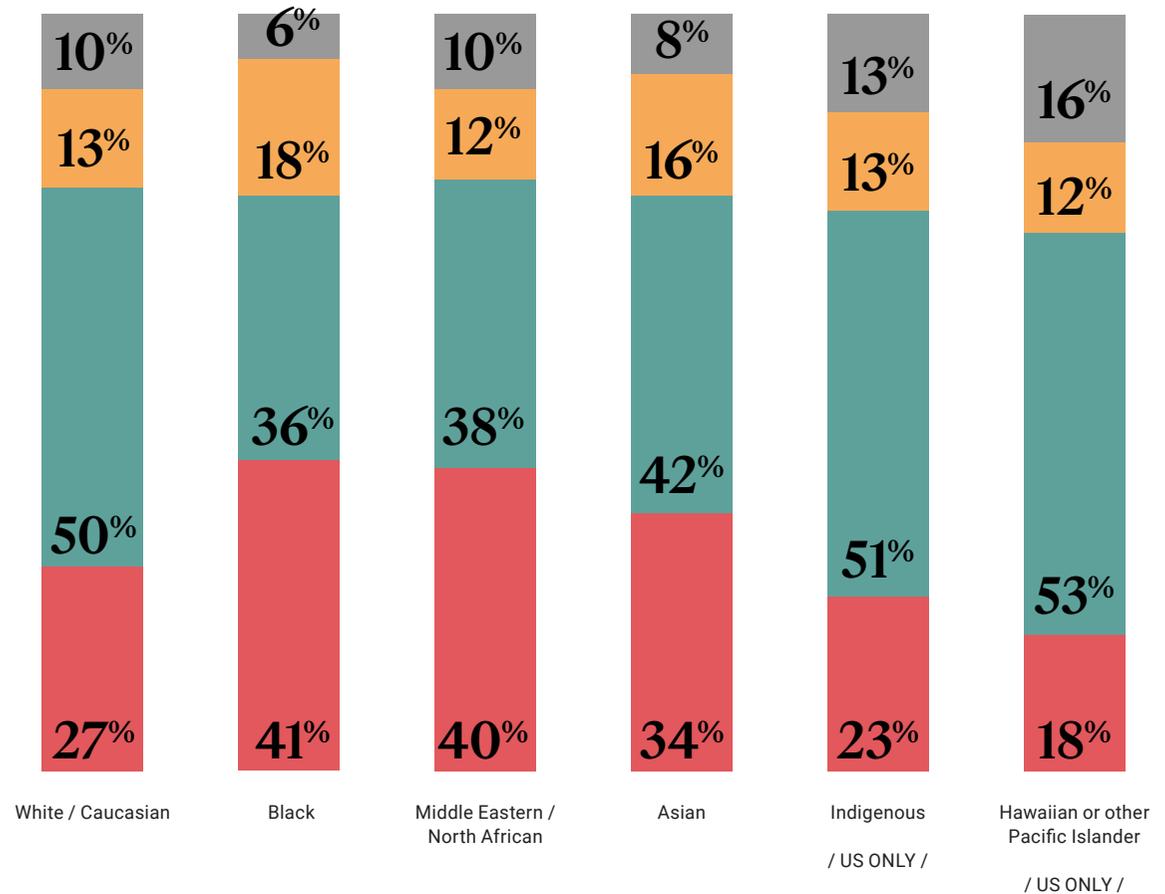# Is society becoming more racist?

Civil rights and race certainly are not flying under the radar, with around a quarter (24%) of those surveyed having read or heard about this issue recently. Despite efforts around the world to raise awareness and address racism, the overwhelming majority of people believe that racism – towards those of any race – has either increased or stayed the same.

After the George Floyd tragedy triggered protests against police brutality around the world in 2020, many would have hoped that the steps organizations around the world have taken to overcome racism against black people would have started to make a difference. However, 41% of those surveyed agree that racism against black people has increased in the past 12 months. In the US, 65% of black people agree that racism has increased, suggesting the lived experience may be different to the outside perception.

It seems that racism against people from the Middle East and North Africa has also increased significantly in the last year. This is particularly true of France and Germany, where 60% and 50% respectively, agree that racism against this community has increased, which could be as a result of people being displaced by regional conflict and making new homes in Western European countries.

Q **How did racism towards each of the following groups change in the last year?**

Legend: Increase, No change, Decrease, Not sure

	White / Caucasian	Black	Middle Eastern / North African	Asian	Indigenous / US ONLY /	Hawaiian or other Pacific Islander / US ONLY /
Not sure	10%	6%	10%	8%	13%	16%
Decrease	13%	18%	12%	16%	13%	12%
No change	50%	36%	38%	42%	51%	53%
Increase	27%	41%	40%	34%	23%	18%

# Who is responsible for addressing racism?

The consensus worldwide is that everyone has a role to play in tackling racism. Of those surveyed more than two-thirds (68%) agreed that everyone in their country is responsible, at least to some extent.

Those in the UK were less likely to ascribe responsibility to any one organization or community, but 75% agreed that everyone should work together to address the problem of racism.

Comparatively, those in Sweden were much less likely to put the responsibility on everyone than other countries in the survey **(45%)**, with more people **(49%)** believing that the government should take control of the situation. Germany and France were also significantly more likely than average **(57%** and **51%** versus **37%)** to look to the government to find and tackle racism in their countries.

In the US, where law enforcement has been a focal point for the discussion around racism, a quarter **(24%)** agree that police and other enforcers should take responsibility, although this increases to 31% amongst people from black communities.
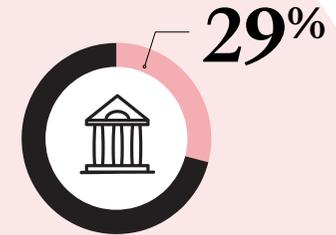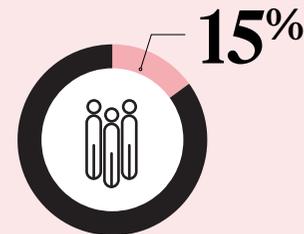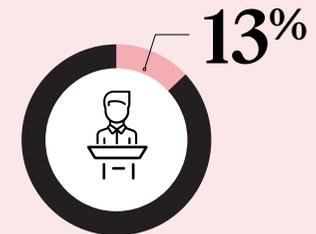
Federal government

37%

Schools

30%

Local government

29%

Law enforcement

25%
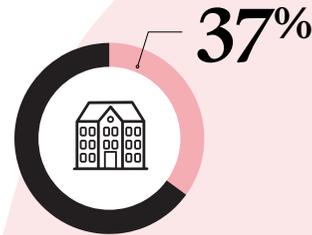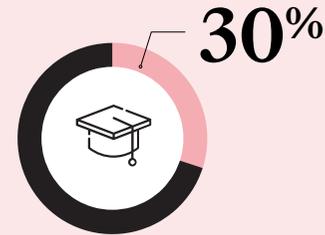
White communities

15%

Industry leaders

13%

Is mainstream media stoking the fire?

The mainstream media, comprising national and regional newspapers, magazines, TV, movies, podcasts, radio broadcasts, and online publications, is becoming increasingly fragmented.

With more channels and more publications, it is increasingly difficult to control and regulate against racist and other harmful content, particularly when trying to balance online safety with preserving freedom of speech.
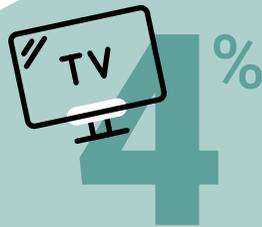
The role of algorithms

Whatever consumers' interests or beliefs, their experiences with online mainstream and social media are largely controlled by algorithms. Engagement with one piece of content will result in recommendations for other similar or linked content, which can result in people 'going down a rabbit hole' or being 'trapped in an echo chamber'.

While many organizations are working to reduce conscious and unconscious bias in their algorithms, and reduce potentially harmful content from their platforms, the volume of content means that companies often rely on AI or algorithms to identify dangerous or inappropriate content, and a lot flies under the radar.

CASE STUDY:
Media Matters for America

Back in 2021, the not-for-profit research and information center Media Matters for America decided to study TikTok's algorithm. After interacting solely with transphobic content, they quickly found that the recommendation algorithm populated the research account's 'For You' page with misogynist, racist and white supremacist, antisemitic, ableist, and other violent or hateful content.

Media Matters for America concluded: "In many videos containing harmful or violative content expressed more than one form of dangerous rhetoric… The intersectional nature of these videos means creators can incorporate various strains of bigotry and hate, and thus introduce viewers to new, dangerous ideologies."

53%

Of people feel that mainstream media has played an extremely or very significant role in perceptions of racism. In the US, this increases to 62%.

4%

Agree that the media has played no role in perceptions of racism.

OPINION:
Kelsie Schroder, Research Manager

As social media has become an integral part of our lives, it's often debated how positive screen time is, how credible facts the media shares are, and the role the media plays in perpetuating negative perceptions of social issues. But as an avid social media user, I find power in gaining new perspectives and often learning something new from real people's stories. There is no limit to growing our knowledge as humans, and social media serves as a more informal way of learning through others' experiences and stories – opening me up from my physical bubble.

EMPLOYMENT
& equity

The average worker spends around 20% of their week at work – but its impact on their lives is much further reaching. Work provides us with the income needed to have shelter, food, and safety, and it can also have a significant effect on confidence and overall happiness.

As it stands, two in three **(66%)** employees are satisfied with their employer, but only 28% say they are very satisfied leaving room for improvement. As the data in this section shows, many workers feel discriminated against and there is scope for employers to provide more opportunities to generate equity for under-represented groups.

The onus is increasingly on employers to do the right thing: to treat their employees well. While there is a balance to strike, less than half **(46%)** of employees agree that their employer cares about people over profit, which could negatively affect everyone in those workplaces, particularly those who are already vulnerable or disadvantaged.

What do employees expect from their employers?

Employees want employers to pay most attention to their quality of life and experience in the workplace above anything else.

Despite the current cost-of-living crisis affecting many countries, compensation and higher pay fall down the list of priorities that employees want their companies to focus on. Nearly twice the number of people would prefer their employer to focus on work-life balance, although it is more important to women (**62%** versus **54%** of men), who typically pick up the lion's share of household management and childcare duties.

Women are also keener for their employers to focus on providing opportunities for growth and professional development (**41%** versus **32%**) and on delivering diversity, equity, and inclusion initiatives (**32%** versus **24%**).

In addition to the top four priorities, employees would like to see employers focusing on creating hard-working environments (**25%**), on sustainability (**25%**), and on developing a professional work environment (**22%**).
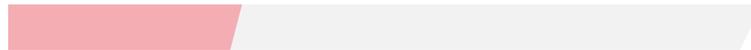
Regardless of their own values, employees put upholding values – traditional, progressive, patriotic or conservative – right at the bottom of the priorities they want their employer to focus on.
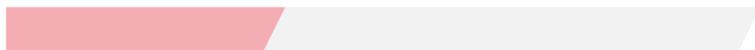
59%

Want their employer to focus on work-life balance
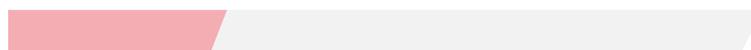
31%

Want competitive compensation, whether that is through salaries, bonuses, or other employee benefits

37%

Think their employer should focus on providing opportunities for growth and professional development

29%

Expect the employer to spearhead or support diversity, equity, and inclusion initiatives

Retention and workplace experiences

Discrimination in the workplace can have an impact on employees' progression, financial security, confidence and sense of belonging, as well as their engagement with the workplace and productivity.

With many employers focusing on removing any barriers and discrimination within their organization, nearly two in three **(64%)** employees have never felt discriminated against. Fewer than one in five **(17%)** agree that they have been discriminated against by their employer, although people in the US are more likely to agree that they have been discriminated against than those in Europe **(23%** versus **14%).**

While direct discrimination against workers may be improving, more than a quarter **(27%)** of those surveyed said they have previously left or are considering leaving a role because they do not feel comfortable expressing themselves or their views. This increases to 33% amongst the LGBTQIA+ community and 38% amongst those who are gender non-conforming. In the UK and US, 37% of those in the BIPOC community have also left a role, or are considering doing so in the near future, suggesting that many underrepresented groups may be having similar experiences.

Gen-Z are more likely to agree that they have been discriminated against by an employer **(21%)**, with over a third **(35%)** saying they have left or are considering leaving a role because they feel they cannot express their views, in comparison to only 13% of Boomers.

I feel discriminated against by my employer:

Total	BIPOC (UK and US only)	LGBTQIA+	Heterosexual	White/ Caucasian
17%	23%	21%	17%	17%
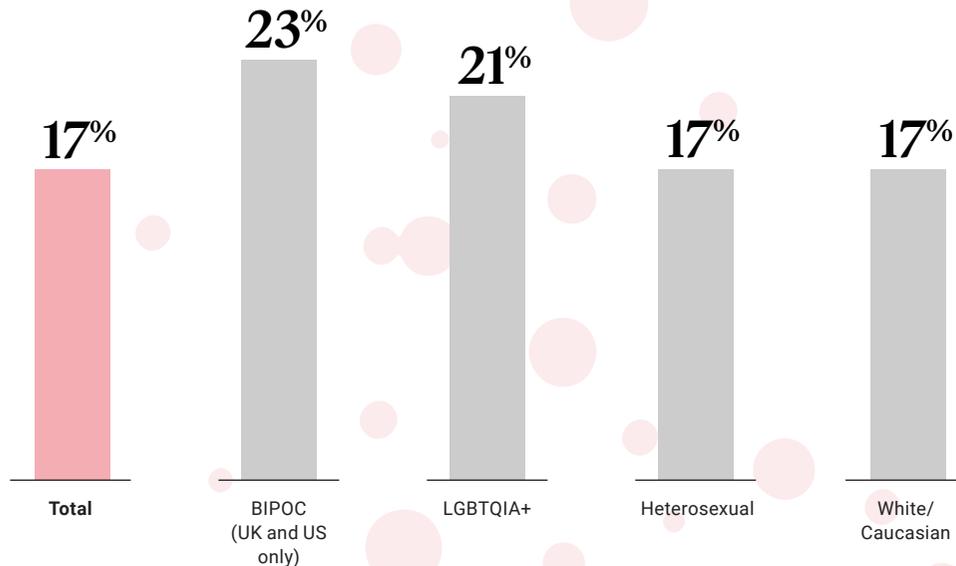
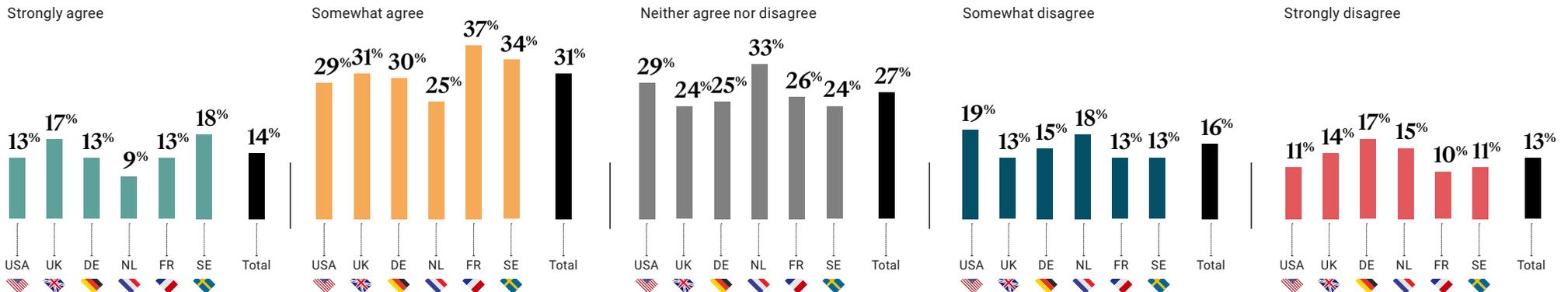# What's standing in the way of workplaces becoming more inclusive?

As employees' expectations – and those of society as a whole – continue to evolve, employers and business policies will need to evolve too. As younger generations join the workforce, it is becoming more transactional and people are prepared to move on from roles that do not meet their standards when it comes to inclusivity.

Nearly two in five **(38%)** of those surveyed for this report agree that a truly inclusive and collaborative workplace will only be possible with a change of business leadership. Boomers are less likely to agree **(27%)**, and 37% strongly disagree that a changeover in business leadership will help businesses to become more inclusive.

While companies are taking steps to improve representation in company leadership, it takes time for policies designed to increase the flow of talent to take effect. As it stands, 32% say that there is a lack of representation within company leadership, increasing to 40% amongst the LGBTQIA+ community. Gen-Z and Millennials are also more likely to agree that there are gaps in the senior leadership team (**42%** and **34%** respectively).

Getting pay and promotion right is an essential factor in helping employees to feel appreciated, and ultimately to retain the best talent, but a significant proportion of the workforce recognizes inequalities. Those in Sweden and France are more likely to agree there is an issue with compensation (**52%** and **51%** respectively), while those in the Netherlands under-index at 35%.

Q **To what extent do you agree that there are inequalities in promotion and pay in your organization?**

Strongly agree

	USA	UK	DE	NL	FR	SE	Total
	13%	17%	13%	9%	13%	18%	14%

Somewhat agree

	USA	UK	DE	NL	FR	SE	Total
	29%	31%	30%	25%	37%	34%	31%

Neither agree nor disagree

	USA	UK	DE	NL	FR	SE	Total
	29%	24%	25%	33%	26%	24%	27%

Somewhat disagree

	USA	UK	DE	NL	FR	SE	Total
	19%	13%	15%	18%	13%	13%	16%

Strongly disagree

	USA	UK	DE	NL	FR	SE	Total
	11%	14%	17%	15%	10%	11%	13%

What's standing in the way of workplaces becoming more inclusive?

OPINION:

Nicole Beremovica, Research Analyst

An intersectional approach is critical to address any social issue in a comprehensive way. The concept of intersectionality was coined by Dr. Kimberly Crenshaw, recognizing that inequalities like gender and race are overlapping and interdependent. When we look at our workplace and the work we produce, we must acknowledge that tackling discrimination in an isolated way may mean that people with multiple marginalized identities fall through the cracks.

Integrating the complexity of identities in the design of our work and our workplace can elevate people with permanently marginalized identities and people who might be in temporary positions that require accommodations. For example, when considering the experience of someone permanently blind in our research and design, we are also solving problems for people after eye surgery or for people who are distracted and multitasking. Going beyond this inclusive design principle of "solving for one, extending to many," how can we solve for a person that encapsulates 'many' in themselves?

With much work being done to raise awareness of social issues in our industry, we need to take the next step and create experiences that are genuinely inclusive, sustainable, and feasible.

Are employers taking action?

Most employers are doing what they can to improve inclusion in the workplace, but there is always more that could be done to give workers from diverse and underrepresented backgrounds equity and help them feel adequately supported in the workplace.

Responding to and managing issues that arise is no longer seen as enough. Employees expect to see their employers taking action to raise awareness of key issues affecting different groups and communities. They want employers to create an environment where everyone can reach their full potential and perform to the best of their abilities.

49%

Of employees say that their employer is addressing important social issues as they arise via meetings, newsletters, and webinars. This is a good way of making sure that employees know what help is available if a social issue is affecting them in some way – for example, using a meeting or newsletter to direct staff to an employee assistance program.
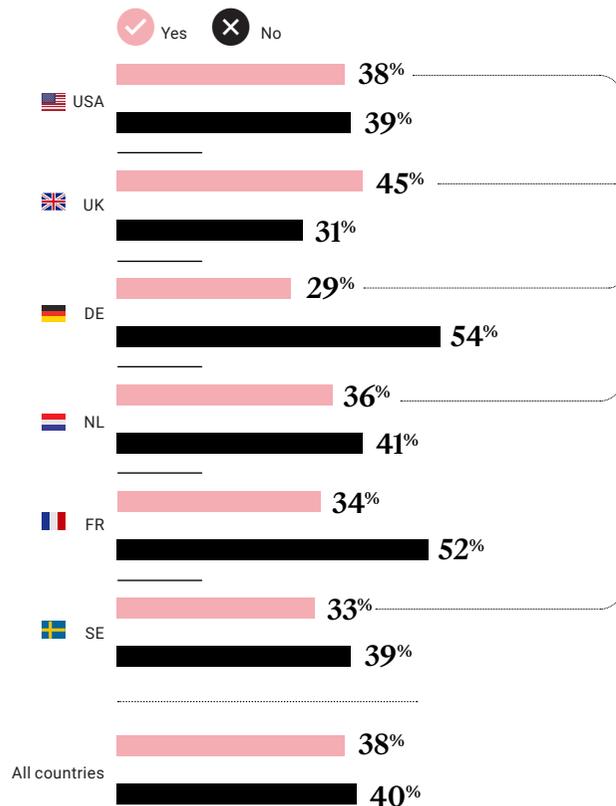
45%

Agree that their company validates all gender identities through action, for example by encouraging employees to put their pronouns in their email signatures. This figure actually increases within the LGBTQIA+ community, suggesting that these efforts are helping people to feel included and supported.

62%

Of employees agree that their employer creates an environment where all religious beliefs and identities are respected. This decreases amongst Muslims and those who follow East Asian folk religions (to **48%** and **47%** respectively), which suggests that employers might benefit from speaking to those employees about what adjustments could benefit them.

Do workplace DE&I initiatives actually work?

Q Does your company currently have a Diversity, Equity, and Inclusion (DE&I) task force, team, or something similar?

✓ Yes   ✕ No

Country	Yes	No
🇺🇸 USA	38%	39%
🇬🇧 UK	45%	31%
🇩🇪 DE	29%	54%
🇳🇱 NL	36%	41%
🇫🇷 FR	34%	52%
🇸🇪 SE	33%	39%
All countries	38%	40%

Q Has your company's DE&I task force or team been effective at implementing change?

All responding 'yes'

| Country	
🇺🇸 USA	80%
🇬🇧 UK	84%
🇩🇪 DE	86%
🇳🇱 NL	78%
🇫🇷 FR	82%
🇸🇪 SE	86%
All countries	83%
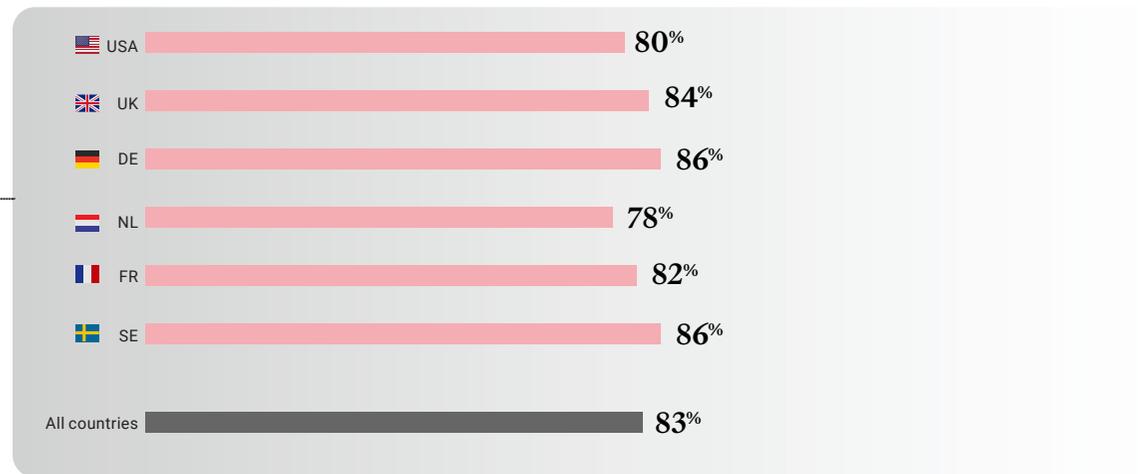
While not all companies have implemented a DE&I task force or team to identify issues and make changes within their workforce, the data suggests that where they exist, they can be incredibly effective. There may be lessons to learn in the way that Germany and Sweden are operating their task forces that could benefit those in other countries.

Do workplace DE&I initiatives actually work?
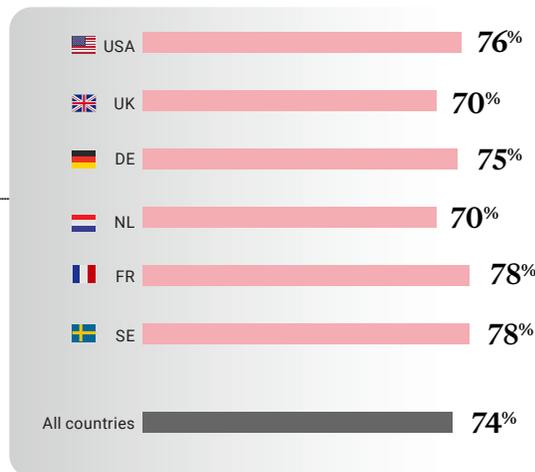
Q Has your company provided DE&I training in the last year?

✓ Yes ✕ No

USA
45%
55%

UK
50%
50%

DE
31%
69%

NL
34%
66%

FR
29%
71%

SE
45%
55%

All countries
42%
58%
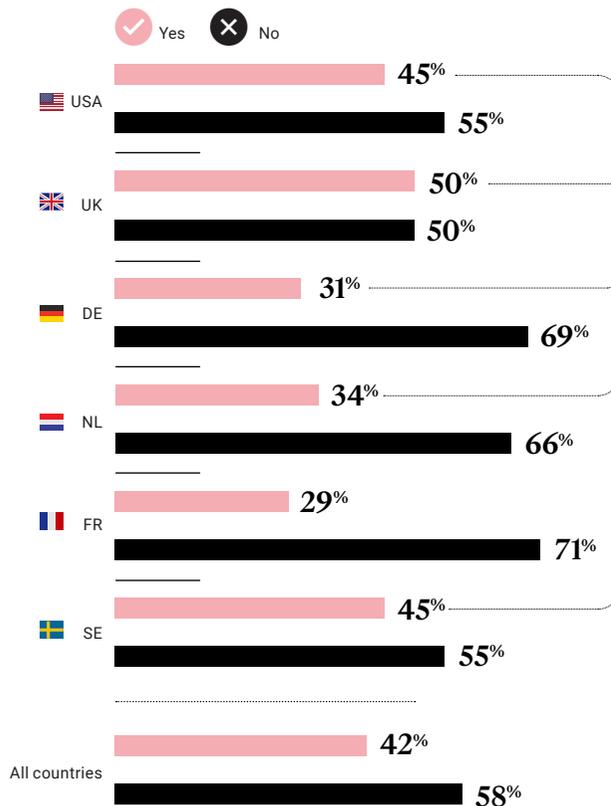
Q In your opinion, has the DE&I training had an impact on workplace culture?

All responding 'yes'

USA 76%
UK 70%
DE 75%
NL 70%
FR 78%
SE 78%

All countries 74%

DE&I training seems to be less of a concern for businesses than establishing a task force, although there is still strong take up in the US, UK, and Sweden. However, more employees in the US and Sweden agree that their training is effective than those in the UK, which suggests room for improvement.

OPINION:

Meaghan Willis, Director Research, Insights and Consulting

Making the workplace a safe, inclusive, and welcoming space for everyone is critical for every employer to ensure. This necessitates policy – but without investing in creating a culture that celebrates, protects, and normalizes diversity, equity, and inclusion, policy is little more than PR.

DE&I is so much more than a policy or HR issue/initiative; it has to be an all-hands-on-deck, across-the-board, top-down, and bottom-up pursuit that moves the needle from policy to everyday practice. As employees, we have an individual and collective responsibility to connect with and support ALL our colleagues and cultivate a culture of empowerment and inclusivity. DE&I isn't just about bringing in people from different backgrounds. It's about ensuring that we set our colleagues and employees up for success, encouraging them to unlock their full potential. Diversity and inclusion make us better, wiser, and stronger… we can only do great work when we work together.

EXPERIENCE
& behavior

How does experience shape behavior?

While price, quality and convenience are important elements for everyone when it comes to consumer products, those from under-represented groups are more likely to make ethical shopping choices.

The old adage of 'treat others as you would want to be treated' resonates with those who may have experienced discrimination, and it means that they want to support people like them, and remove their support from companies that display harmful, inconsiderate, or hypocritical behavior.

While many brands are keen to use their platforms to promote diversity, it needs to ring true – and when they get it wrong it can backfire. In recent years, we have seen highly successful campaigns like This Girl Can from Nike and unmitigated flops like Pepsi's Black Lives Matter advert. This research reveals attitudes to DE&I and sustainability that suggest that brands need to practice what they preach and consult with diverse groups, or risk alienating loyal customers.

How do consumers prioritize how to make a purchase?

Price
68%
Of consumers say their priority is finding the best price, regardless of any other factor. This increases to 72% amongst women, and to 73% amongst Boomers, who are more likely to be watching the pennies as they exit the workforce.

Quality
63%
Prioritize good quality when they purchase a product. The focus on quality was relatively consistent across all communities, with those who identify as Christian being marginally more likely to focus on quality (67%), along with males (66%).

Convenience
52%
Say that proximity and convenience define their shopping habits. Those living in the US are more likely to agree with this (57%), perhaps given behavioral shopping patterns and span of convenient shopping resources at their disposal while those in the Netherlands are the least likely to agree (36%).

Design
45%
Agree that the design and aesthetic of new products is important to them. This is significantly higher amongst Gen-Z (54%) than the Boomer Generation (36%), where price is by far and away the most influential factor.

Brand name
42%
Prefer to shop at well-established brands. While businesses often focus on the loyalty of their customers – as it costs more to acquire than to retain – a well-known brand falls a long way down the list for many consumers.

Innovation
40%
Get excited about buying products with new features and innovation, and 20% enjoy the novelty that comes with buying the latest products. Millennials are twice as likely to look for products with new features than Boomers (48% versus 24%).

Shop local
40%
Prefer to shop at a small or local business. Consumers in France and those in the LGBTQIA+ community are more likely to prioritize shopping with small or local businesses than the norm (50% and 45% respectively).

Support minority-owned business
23%
Prefer to shop with minority-owned businesses. In the US and UK, those from the BIPOC community are significantly more likely to shop at minority-owned businesses than white or Caucasian people (35% versus 20%), as are those from within the LGBTQIA+ community (33%).

# How much does DE&I feed into shopping behavior?

While price, convenience, and quality will always be dominating factors in consumer purchase decisions, many people will shop with their feet if a business does not show ethical behavior. Across all groups, three in 10 (29%) consumers agree that they will not buy from a brand that is not committed to DE&I.

Gen-Z consumers are leading the charge, along with those in the LGBTQIA+ community – where both are unwilling to support brands that they deem to be unethical in some way. The same also applies to the BIPOC communities in both the UK and the US. In all cases, 37% of consumers are prepared to shop elsewhere to ensure they are not contributing to behaviors or causes that they disagree with.

Consumers are also more specifically concerned about how brands treat their employees. Two in five (39%) of consumers agree that they will not buy from a brand that is not committed to providing decent working conditions and pay for their employees.

I will not buy from a brand that is not committed to diversity, equity, and inclusion:

All who agree

All countries	USA	UK	DE
29%	31%	28%	26%

NL	FR	SE
28%	37%	25%
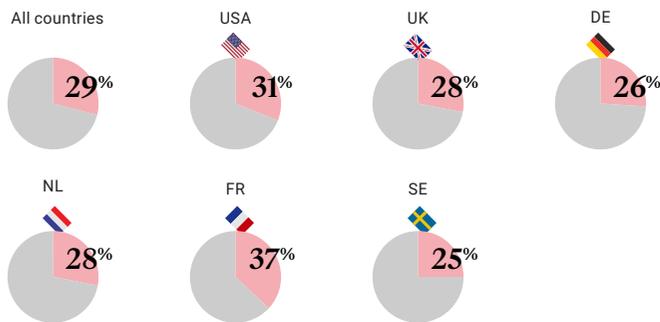
Where does the circular economy fit in?

Sustainability is a growing area of interest for consumers, and it is reflected in their purchase decisions. Around two in five **(39%)** look to buy second-hand or refurbished items whenever possible, with consumers in Sweden and France being particularly invested in the reuse economy (**48%** and **46%** respectively).

Women (**45%**) and people in the LGBTQIA+ community (**48%**) also over-index on buying second-hand, as interest in vintage fashion continues to grow and the rising cost of living pushes people to seek cost-saving options.

Overall, 42% of consumers agree that a brand's sustainability is important to them, with younger people tending to be slightly more focused on how their behavior might affect the environment. Gen-Z and Millennials are more focused on sustainability than the average, with Generation-X and Boomers falling slightly below average.

Get up, stand up?

There is a perception that brands need to pin their colors to the mast when it comes to important social issues. Remaining silent at important social moments has both pros and cons, but for the majority of consumers it will have no effect on how they view the company.
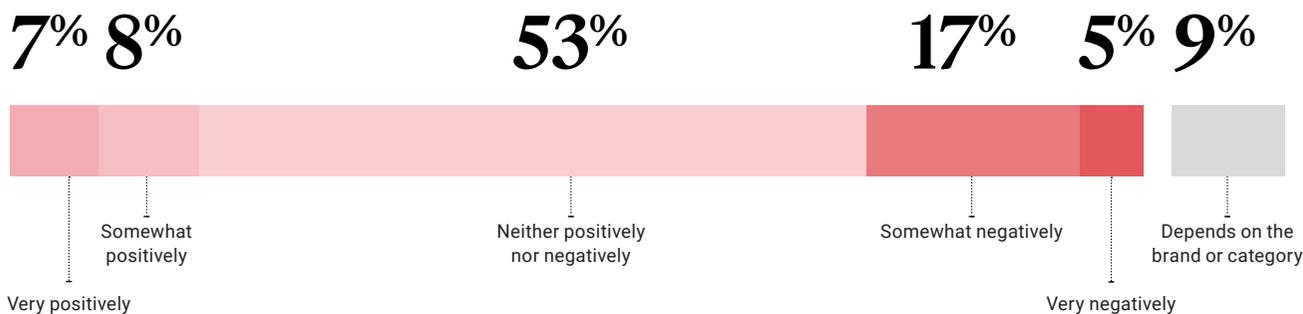
Only one in five **(22%)** say that their perception of a brand would be negatively affected if they noticed that it remained silent during an important social moment, in comparison to 15% who would actually feel positive about it. In fact, more than half **(53%)** of consumers would think neither positively nor negatively about a brand if it did not speak out.

Consumers from the Boomer generation in particular are less likely to have a strong opinion about brands' involvement with social issues, with 64% saying that their perception would not be affected, and only 17% would find their view negatively altered. By comparison, 30% of Gen-Z would change their opinion for the worse.

Generally speaking, those from under-represented groups are more likely to be frustrated with a business that did not speak out during an important social moment. With 28% of the LGBTQIA+ community, 31% of gender non-conforming people and 27% of those from the BIPOC community (in the UK and US only) reporting that their perception of a silent brand would be negatively affected.

While many consumers would not be positively or negatively affected if a brand remained silent, consumers do appreciate brands' efforts to make positive changes towards diversity and inclusion. Two in five **(42%)** are optimistic about this, in comparison to 17% who feel pessimistic. Those in the Netherlands and France are the most optimistic, with the UK and Germany erring towards the pessimistic end of the spectrum.

Q How would you feel if a brand remained silent during an important social moment?

7% 8% 53% 17% 5% 9%

Very positively — Somewhat positively — Neither positively nor negatively — Somewhat negatively — Very negatively — Depends on the brand or category

OPINION:

Marni Hirschorn, EVP Research, Insights and Consulting

The research findings suggest that a brand's silence during important social moments has limited impact on most consumers. However, it also reveals an opportunity for brands to proactively engage with diversity and inclusion efforts, aiming to maintain customer loyalty and attract new ones, particularly among younger generations and underrepresented communities. Brands should actively listen, engage in dialogue, and conduct thorough research to gain insights into the diverse needs and expectations of their audience. Understanding diverse perspectives involves recognizing the unique experiences, values, and aspirations of different communities. Striking the right balance can be challenging, but brands need to find a sweet spot between actively addressing social issues and respecting the diverse beliefs and preferences of their audience. It requires authentic and genuine efforts, avoiding performative gestures or virtue signaling. By taking a thoughtful and well-informed approach, brands can navigate social issues with sensitivity and empathy, earning the trust and respect of their customers.

Achieving DE&I goals together

For this report, in particular, we felt it was critical to hear the voices, see the faces, and emphasize the unique stories and perspectives of individuals in order to get at the route of the issues our society faces.

The following responses, initially gathered through a qual research platform through video footage, provide richer, permeating, and nuanced insights into the lives of each respondent. The first question seeks suggestions on actions brands can take to promote Diversity, Equity, and Inclusion. The second question concerns the most significant obstacles hindering Diversity, Equity, and Inclusion in various contexts, such as workplaces, communities, and brands. This qualitative tool provides a further, more tactile understanding of the sentiment surrounding the study, particularly a fleshed-out perspective of the questions posed.

Q What actions do you think brands should take to further Diversity, Equity, and Inclusion?

"…honestly be transparent to the world about their efforts to ensure diversity and inclusivity. That's the first step that brands can take."

"…I think the more diverse the group, the more diverse the focus of the group, the more knowledge that they have."

Q What do you see as the biggest obstacles in achieving Diversity, Equity, and Inclusion at your workplace, your community, from brands, etc.?

"I believe that the priority of all businesses is to make a profit, while looking after the rights of workers…. There are so many conflicting pressures for businesses at the moment, they must prioritize what is possible and feasible for them."

"I would like to see more diversity and inclusion training for people like me who need to understand it coming from a white background. As a white person, there's lots of things I still don't get. And I would really love to be able to know more."

"Hiring practices would be the biggest thing. I've been at my job since 2019 and I'm still the only African American male in the local office…and none in our leadership position with our company at all. So, I think hiring practices would be the biggest thing to increase diversity in the workplace."

"They should acknowledge a lack of diversity in the first place. They should make diversity training an available option for managers without being forceful."

"I think that training should be mandatory on the subject, and I think it should be offered regularly. I also think face-to-face training would be a lot better than just like a standard laptop exercise."

Who we spoke to

We surveyed 4,973 consumers across the US, UK, Germany, the Netherlands, France, and Sweden during May-June 2023.

The demographics broke down as following:

53%
Female

45%
Male

2%
Gender
non-conforming

17%
Gen Z
(18-25)

30%
Millennial
(26-40)

31%
Generation X
(41-59)

22%
Boomer II
(60+)

29%

10%

9%

31%

11%

11%

Minority demographic breakdown

4%
Prefer not to say

85%
Heterosexual

11%
LGBTQIA+

74%
White / Caucasian

28%
BIPOC (UK and US only)

Religions

Christian	Other/no relegion	Athesist	Muslim	Agnostic	Spiritual	Jewish	Hindu	Buddist	Asian folk religion
46%	30%	8%	6%	3%	3%	2%	1%	1%	1%
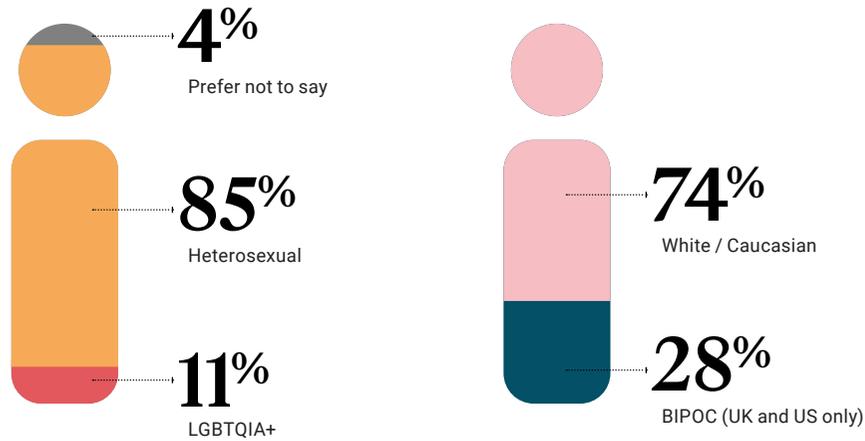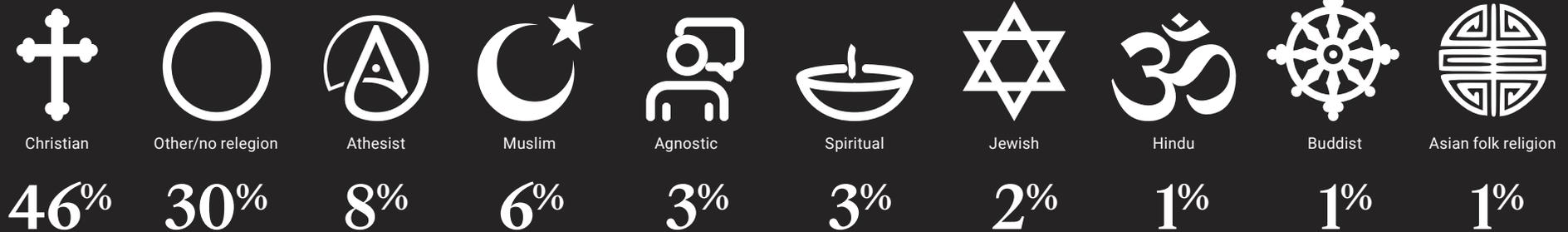
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