Unstereotype Metric Annual Review

November 2021

What we will cover

- A reminder of the Unstereotype Metric (UM) and where it is measured

- What differences do we see in response to the UM?

- Does having positive people portrayal in advertising improve ROI potential?

- I&D Characteristics – what changes are we seeing in advertising over time?

- Which of the I&D characteristics DRIVE positive people portrayal – and has this changed?

- Do I&D characteristics drive Ad Enjoyment as well?

- A summary of the 2021 Key Headlines
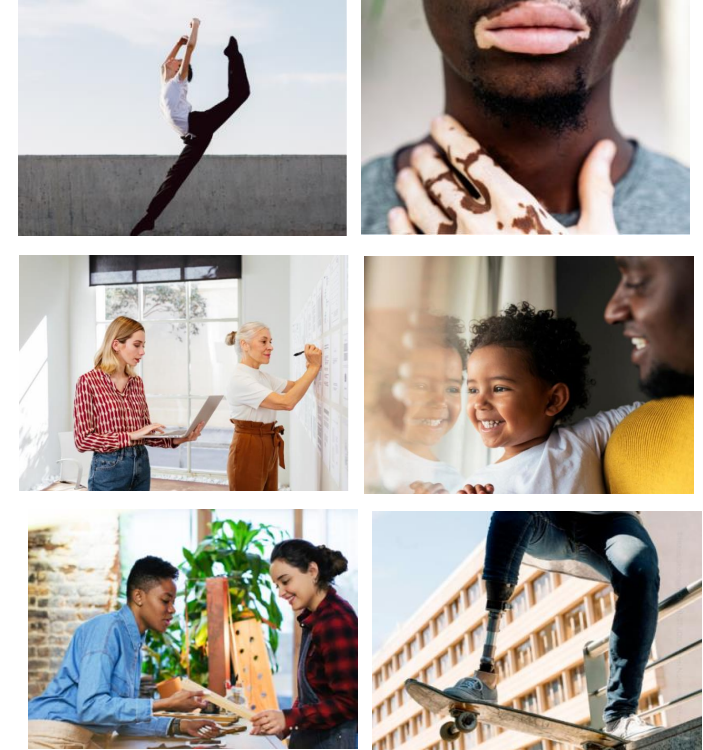
Unstereotype Metric:

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

UM measured for 14,000+ ads across 70 countries, 3,300+ brands and 251 categories

Norms currently available in 46 countries:

Argentina	**Mexico**
Australia	Netherlands
Belgium	New Zealand
Brazil	Nigeria
Canada	Pakistan
Chile	Peru
China	Philippines
Colombia	Poland
Czech Republic	Portugal
Denmark	Romania
Ecuador	Russia
France	Saudi Arabia
Germany	Serbia
Greece	Slovakia
Hungary	**South Africa**
India	Spain
Indonesia	Sweden
Ireland	Switzerland
Italy	Thailand
Japan	**Turkey**
Kenya	**UK**
Korea	USA
Malaysia	Vietnam

Bold = Current National UNW Chapters

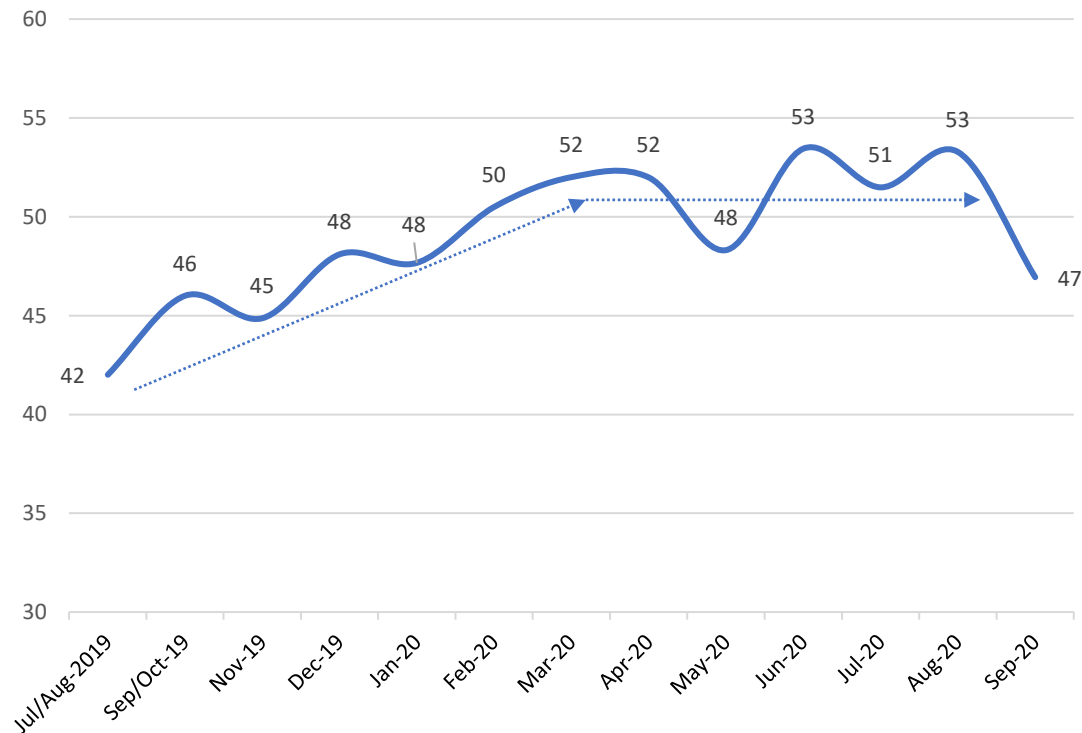#UNSTEREOTYPE
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What differences do we see in response to the UM?

Last year we saw that COVID-19 had slowed progress in the representation of progressive role models

Female UM
(mean score percentile)

As the industry grappled with COVID – both in appropriate messaging and production constraints – progressive depictions of women plateaued

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1 year later we have not only regained lost ground, but accelerated progress to see UM performance strengthening

Average percentile, Female UM ♀

2019	44
2020	47
2021	53

Average percentile, Male UM ♂

2019	43
2020	46
2021	53

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We see little difference between market types, but a stronger score amongst UA members

Average percentile, Female UM ♀

	Total	Emerging	Developed	UA Member	Non UA Member
2019	44	43	45	49	40
2020	47	45	48	49	45
2021	53	54	52	55	51

Average percentile, Male UM ♂

	Total	Emerging	Developed	UA Member	Non UA Member
2019	43	41	44	41	44
2020	46	45	47	48	46
2021	53	54	53	56	52

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UM scores show that Female portrayals tend to be a little stronger in all key markets and significantly stronger in the USA
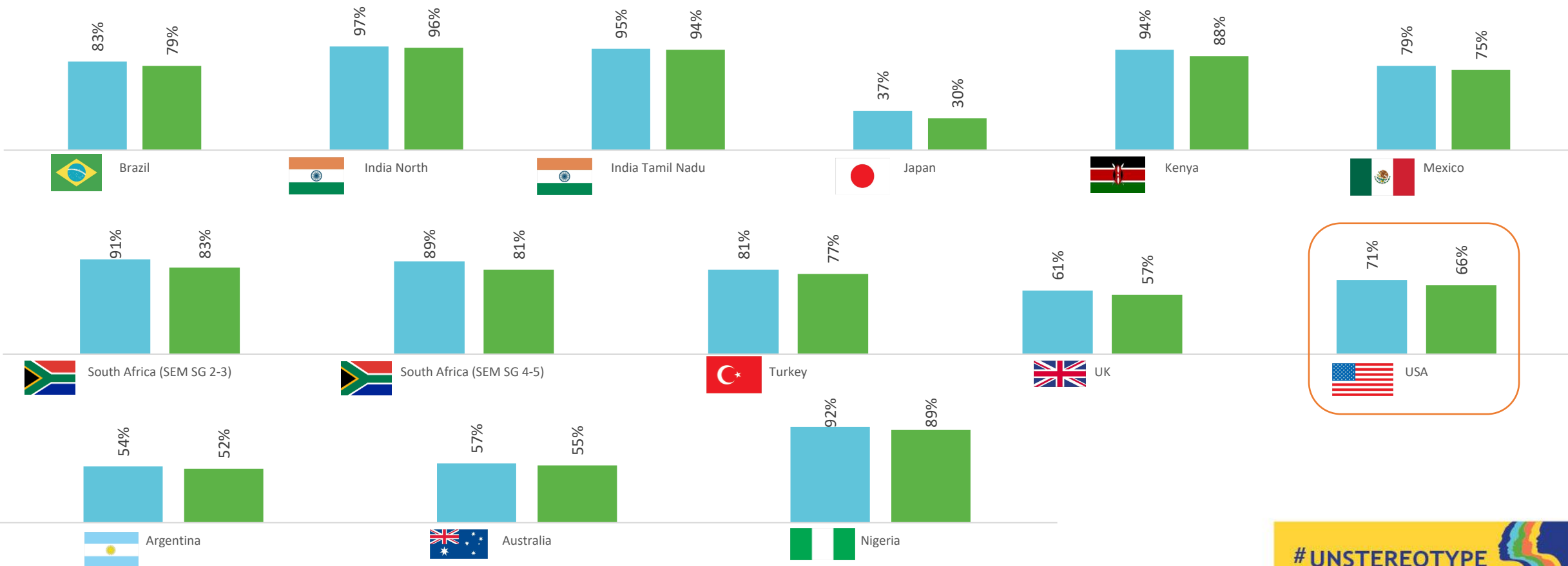
UM Score (Top 2 box %) - Female & Male, by Country

Country	Female UM T2Box	Male UM T2Box
Brazil	83%	79%
India North	97%	96%
India Tamil Nadu	95%	94%
Japan	37%	30%
Kenya	94%	88%
Mexico	79%	75%
South Africa (SEM SG 2-3)	91%	83%
South Africa (SEM SG 4-5)	89%	81%
Turkey	81%	77%
UK	61%	57%
USA	71%	66%
Argentina	54%	52%
Australia	57%	55%
Nigeria	92%	89%

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■ Female UM T2Box ■ Male UM T2Box

☐ = UM Female score significantly higher than UM Male score

Data based on all tests 2019 onwards

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Female UM performance is highest in Personal Care, with performance strong for both gender portrayals in Non Alcoholic Drinks, OTC and Auto

	Alcoholic Drinks	Non Alcoholic Drinks	Food	Personal Care/ Toiletries	OTC / Healthcare	Appliances & Tech	Financial	Household Cleaning	Laundry	Retail	Vehicles/ Auto
Average percentile, Female UM,2021 ♀	45	56	51	60	56	46	46	51	46	46	59
	Alcoholic Drinks	Non Alcoholic Drinks	Food	Personal Care/ Toiletries	OTC / Healthcare	Appliances & Tech	Financial	Household Cleaning	Laundry	Retail	Vehicles/ Auto
Average percentile, Male UM,2021 ♂	54	57	55	51	56	54	46	55	45	45	59

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Big growth in the last 12 months on the Female UM across most sectors, particularly in Alcoholic Drinks and Automotive

Average percentile, Female UM

	Alcoholic Drinks	Non Alcoholic Drinks	Food	Personal Care/ Toiletries	OTC / Healthcare	Appliances & Tech	Financial	Household Cleaning	Laundry	Retail	Vehicles/ Auto
2019	37	43	39	51	*	42	*	*	*	*	*
2020	34	47	42	54	53	40	47	44	42	47	43
2021	45 (+11)	56 (+9)	51 (+9)	60 (+6)	56 (+3)	46 (+6)	46 (-1)	51 (+7)	46 (+4)	46 (-1)	59 (+16)

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Growth vs. 2020 on the Male UM across most sectors too, particularly in Food, Tech and Automotive

♂ **Average percentile, Male UM**

	Alcoholic Drinks	Non Alcoholic Drinks	Food	Personal Care/ Toiletries	OTC / Healthcare	Appliances & Tech	Financial	Household Cleaning	Laundry	Retail	Vehicles/ Auto
2019	51	37	44	37	*	40	*	*	*	*	*
2020	45	50	43	45	52	44	47	45	40	52	48
2021	+9 54	+7 57	+12 55	+6 51	+4 56	+10 54	-1 46	+10 55	+5 45	+4 56	+11 59

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Does having positive people portrayal in advertising improve ROI potential?

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Ads with a high UM continue to provide greater predicted ROI for advertising investment

Difference in average percentile for ads in the top quartile and bottom quartile on Unstereotype Metric

	⚲ More positive Female UM		♂ More positive Male UM	
	2020	**2021**	**2020**	**2021**
Brand Equity (Power)	+37	+36	+41	+36
Meaningful	+38	+38	+42	+38
Different	+33	+33	+36	+33
Short Term Sales Likelihood (STSL)	+13	+18	+15	+18
Impact	+19	+20	+23	+22

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

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The predicted ROI impact of positive people portrayals is stronger in 'Emerging' markets

Difference in average percentile for ads in the top quartile and bottom quartile on Unstereotype Metric

♀ More positive Female UM   ♂ More positive Male UM

	Emerging	Developed	Emerging	Developed
Brand Equity (Power)	+39	+33	+37	+35
Meaningful	+40	+36	+38	+38
Different	+37	+29	+35	+32
Short Term Sales Likelihood	+23	+13	+24	+13
Impact	+25	+16	+27	+19
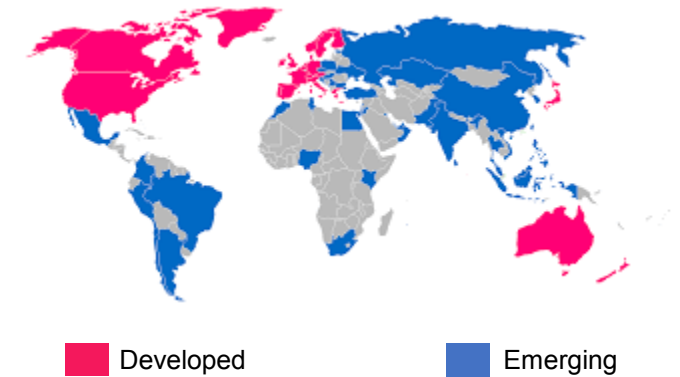
Developed   Emerging

#UNSTEREOTYPE ALLIANCE

KANTAR   Based on 2021 data

Biggest impact is seen in LatAm, India and Turkey – these are the markets where progressive portrayals make the most difference to overall ad quality

Difference in average percentile for ads in the top quartile and bottom quartile on Unstereotype Metric

♀ **More positive Female UM**

	Brazil	India	Mexico	KSA	Turkey
Brand Equity (Power)	+41	+47	+47	+45	+43
Short Term Sales Likelihood	+28	+34	+33	+38	+28

♂ **More positive Male UM**

	Brazil	India	Mexico	Philippines	Turkey
Brand Equity (Power)	+38	+42	+51	+50	+39
Short Term Sales Likelihood	+30	+27	+35	+29	+23

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A stronger impact is also seen for brands who have UA membership!

Difference in average percentile for ads in the top quartile and bottom quartile on Unstereotype Metric

♀ **More positive Female UM**　　　♂ **More positive Male UM**

	UA Members	Non UA Members	UA Members	Non UA Members
Brand Equity (Power)	+40	+33	+38	+34
Meaningful	+40	+36	+39	+37
Different	+37	+30	+35	+32
Short Term Sales Likelihood	+24	+14	+21	+17
Impact	+27	+16	+33	+21

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I&D Characteristics - what changes are we seeing in advertising over time?

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Since 2018, both Women and Men are more likely to be present in advertising, with sole Male presence declining

Representation of Gender in Ad - %
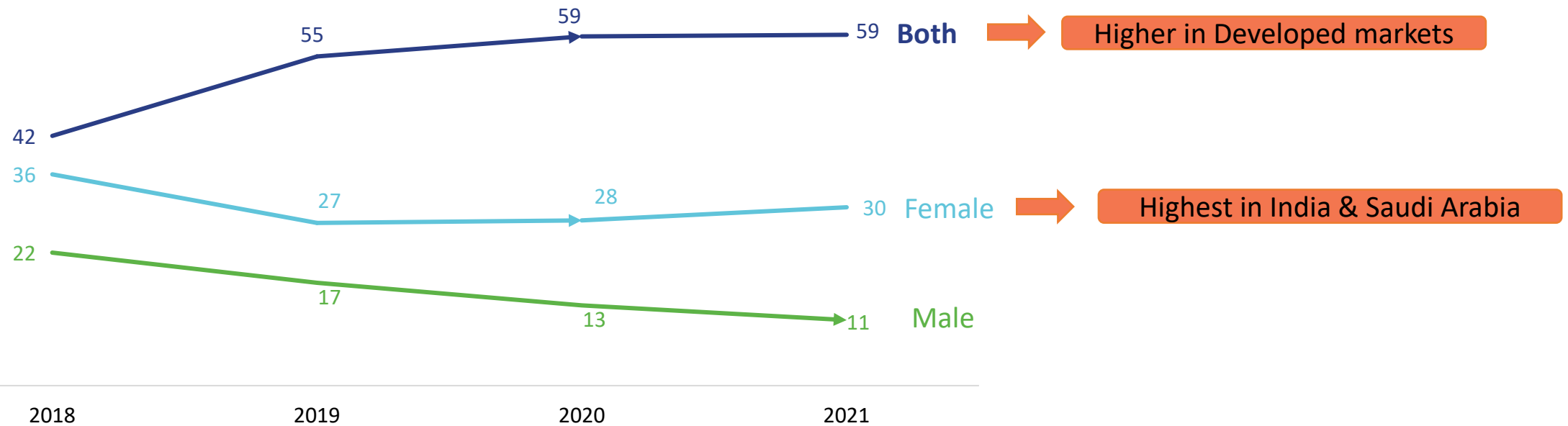
	2018	2019	2020	2021	
Both	42	55	59	59	→ Higher in Developed markets
Female	36	27	28	30	→ Highest in India & Saudi Arabia
Male	22	17	13	11	

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In ads that have both Women and Men, Women are increasingly being given a more prominent role

Prominence in Ad - %

	Female	Equal	Male
2018	16	64	21
2019	21	55	24
2020	20	57	23
2021	26	53	21

Higher in Developed markets

#UNSTEREOTYPE ALLIANCE

Women are increasingly being given speaking lines at the expense of sole Male narration

Has Speaking Lines - %

Based on ads where any characters have speaking lines

We are more likely to see ads where only Females are speaking in India & Indonesia
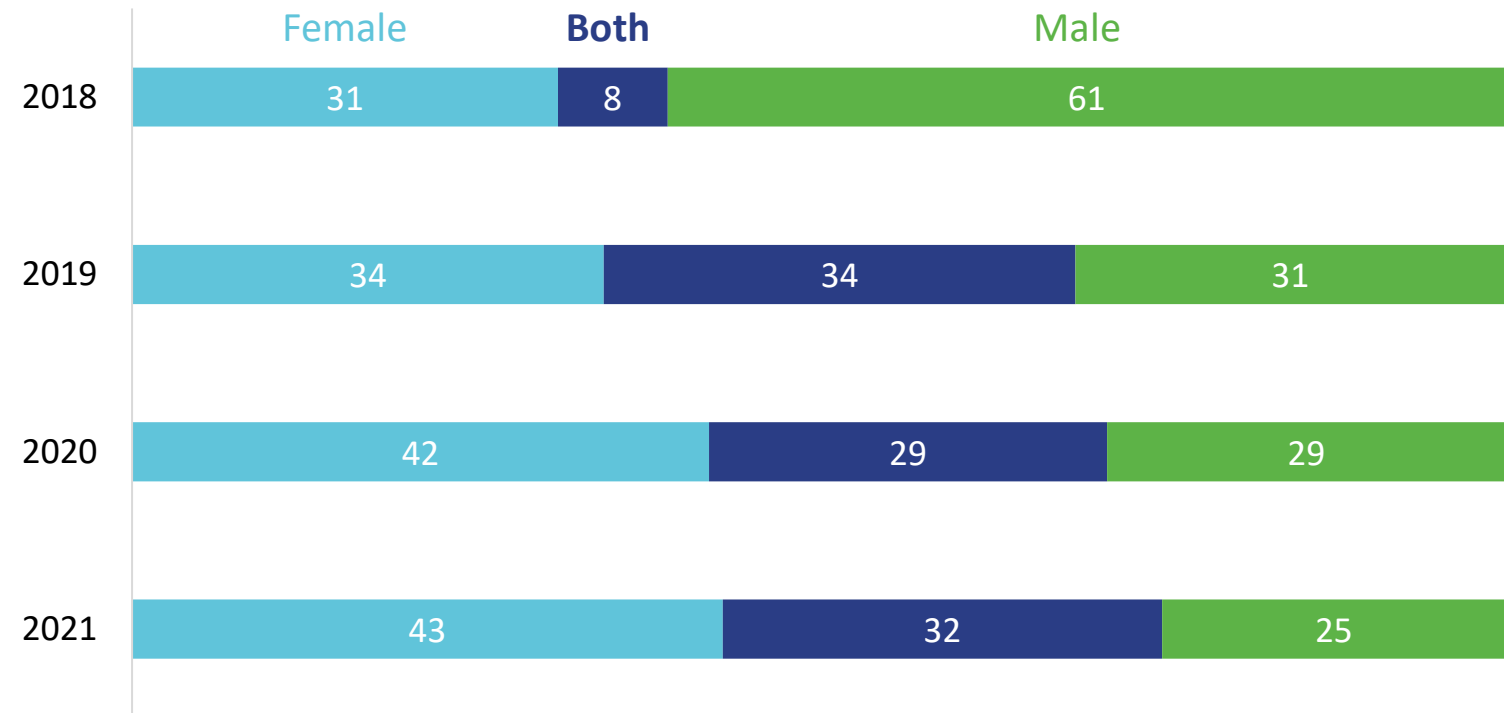
	Female	Both	Male
2018	31	8	61
2019	34	34	31
2020	42	29	29
2021	43	32	25

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Whilst Women have now been getting more time on screen, Male presence is starting to slip away

Screen Time – 50%+
- %

Again we see more Female dominance in India and Emerging markets in general but in Brazil Males still get a large amount of screen time

2018
Female — 57
Male — 69

2019
65
67

2020
69
65

2021
69
61

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ALLIANCE

Yet, both Women and Men are still overwhelmingly portrayed in traditional roles, with little change in 2021*

Features character in a non-traditional role - %
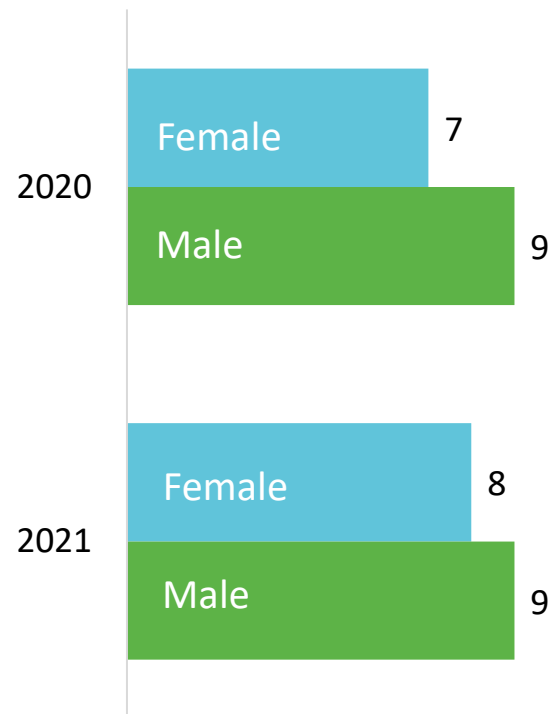
♀ More likely to see Females portrayed in non-traditional roles in Saudi Arabia and South Africa, with more traditional portrayals most common in Pakistan and the Philippines

♂ More likely to see Males portrayed in non-traditional roles in Developed markets (10%), with more traditional portrayals most common in India and Russia

2020
Female 7
Male 9

2021
Female 8
Male 9

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2021 data based on Q420-Q321

*Traditional woman: breaking out of outdated gendered roles (like Science, Engineering, Boxing/Rugby, Fixing a car, etc.)
*Traditional man: breaking out of outdated gendered roles (like caregivers, nursing, cooking, dance, art)

24

In 2021 we've seen a big push on ethnic diversity in advertising, but elsewhere representation continues to be limited

Intersectionality - %

	Mixture of ethnic origins or skin colours		Female: Diverse body types		Male: Diverse body types		LGBTQ		Religious cues in ad		Features someone with a disability	
	2020	**2021**	**2020**	**2021**	**2020**	**2021**	**2020**	**2021**	**2020**	**2021**	**2020**	**2021**
%	22	35	22	21	25	21	5	1	1	1	2	2

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A L L I A N C E
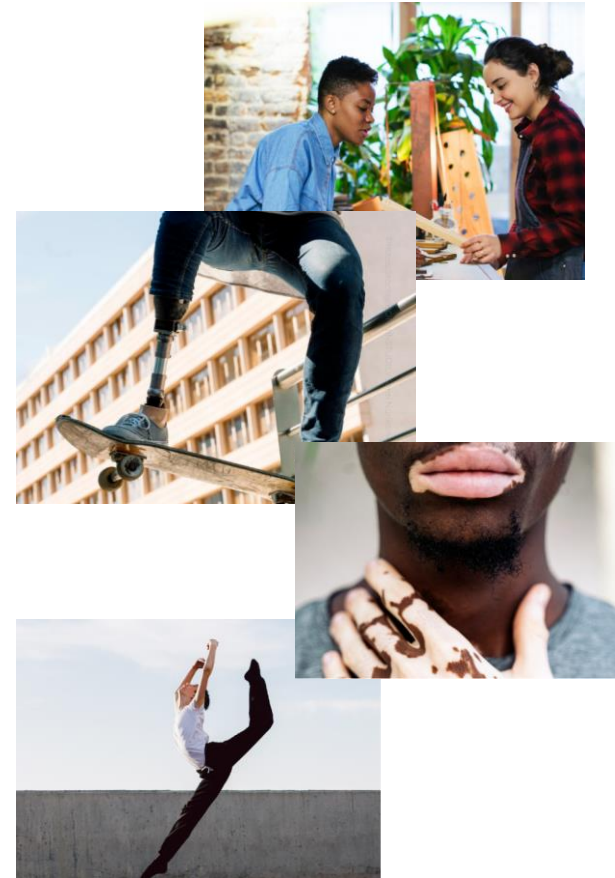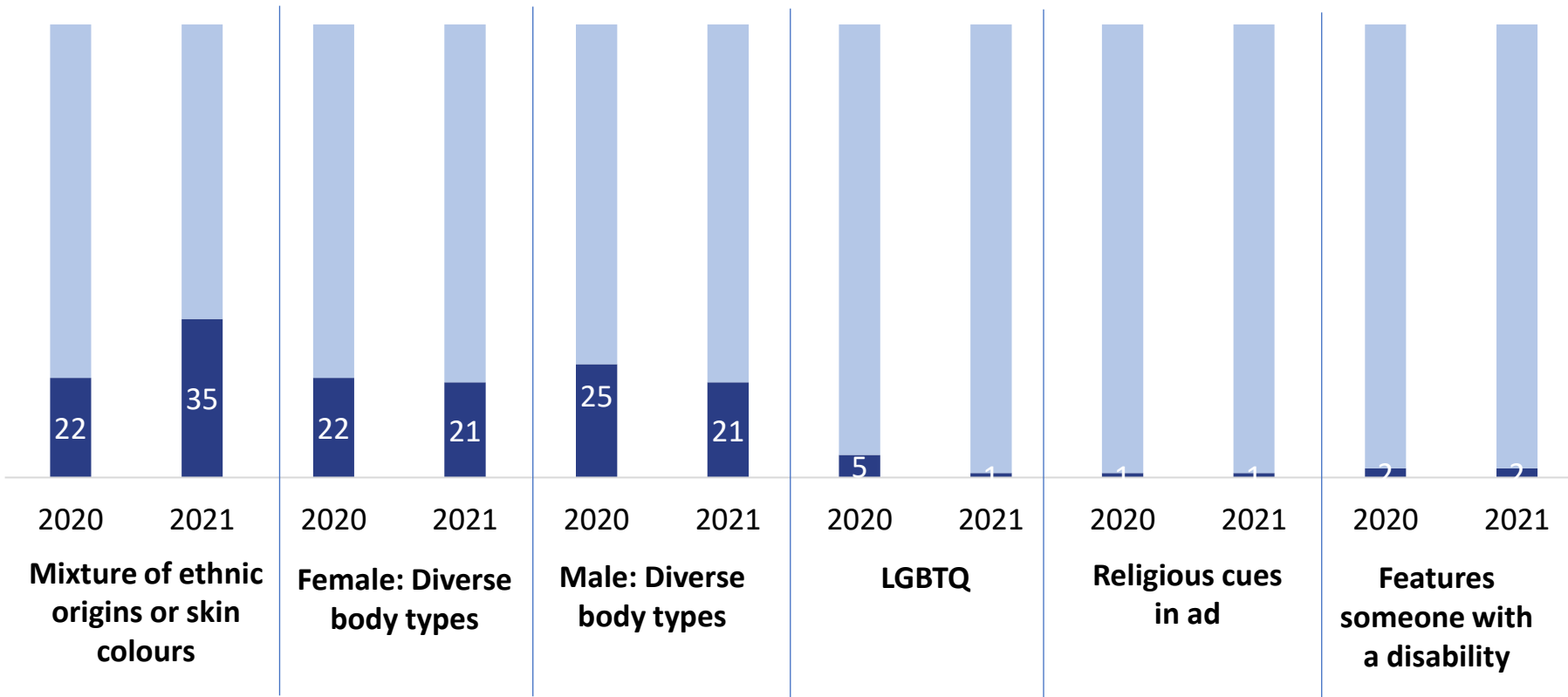
We see key differences in Developed and Emerging and by market

Intersectionality - %

	Mixture of ethnic origins or skin colours		Female: Diverse body types		Male: Diverse body types		LGBTQ		Religious cues in ad		Features someone with a disability	
	Developed	Emerging	Developed	Emerging	Developed	Emerging	Developed	Emerging	Developed	Emerging	Developed	Emerging
	37	16	18	17	21	16	1	0	1	1	2	2

Mixture of ethnic origins or skin colours
LACK of ethnic / skin diversity most prominent in India, China & Greece

Female: Diverse body types
Observed more in Africa and less likely to be seen in Japanese & Taiwanese advertising

Male: Diverse body types
Observed more in Brazil and South Africa and less likely to be seen in Japanese & Taiwanese advertising

LGBTQ
Dominance of heterosexual characters only in Emerging markets (30%) vs. Developed (20%)

Religious cues in ad
Observed more in Indonesia and Saudi Arabia

Features someone with a disability
Observed more in Canada and Mexico

#UNSTEREOTYPE ALLIANCE
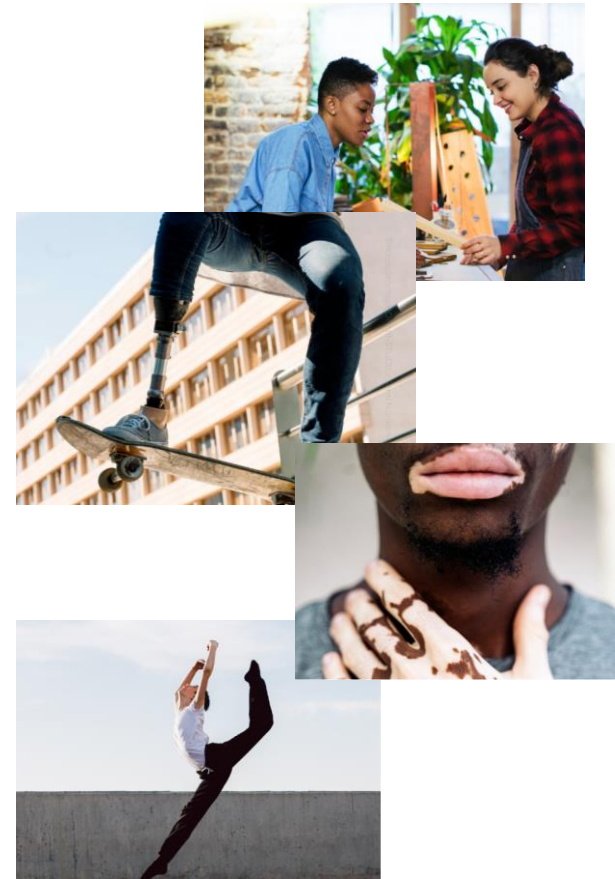
Ageism abounds – especially for Women – though we are seeing good progress here!

Gender by age - %

Aged under 40

2020
- Female: 88
- Male: 72

2021
- Female: 79
- Male: 73

Aged 40 or over

2020
- 12
- 28

2021
- 21
- 27
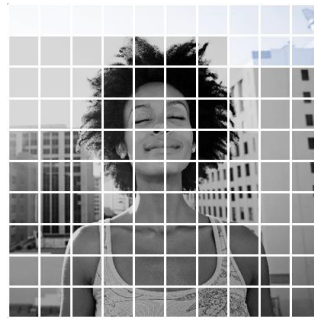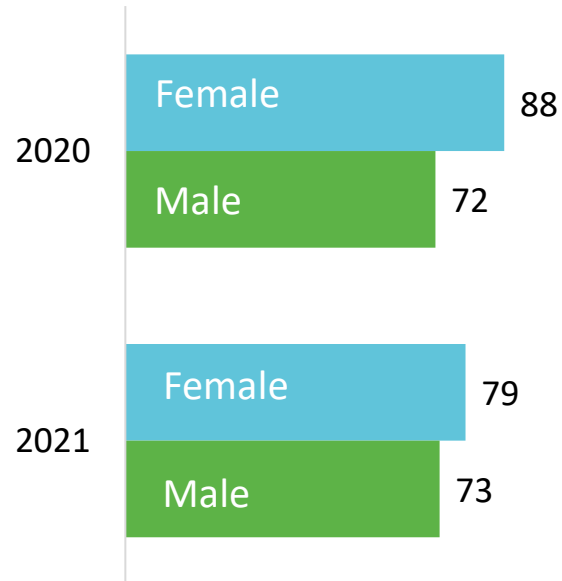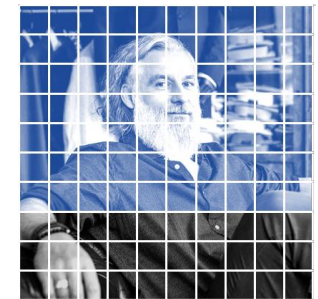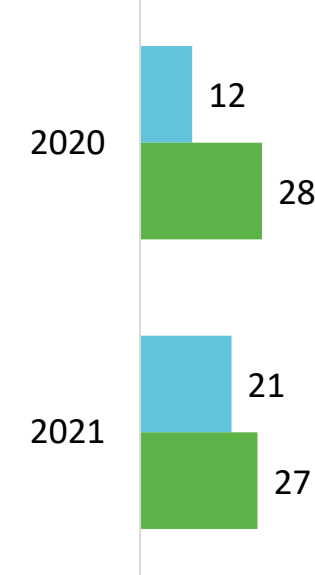
More likely to see Females and Males aged 40+ in advertising in the USA and Canada

#UNSTEREOTYPE ALLIANCE

Which of the I&D characteristics DRIVE positive people portrayal – and has this changed?

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Presence remains key for Women, but Confident characterizations have risen in importance

♀ **Advertising that drives "a positive image of the Female character that sets a good example for others" are those that:**

Legend: Presence, Perspective, Personality

Characteristic	Value	Ranking 2021	Ranking 2020
Female voiceover	30	1	2
Female(s) on screen ≥50% of time	26	2	1
Female(s) most prominent	22	3	4
Female(s) shown as Caring	18	4	3
Female(s) shown as Aspirational	16	5	5
Female(s) shown as Confident	15	6	10
Female(s) with speaking lines	14	7	6
Female(s) shown with Personality	12	8	13
Female(s) shown as Independent	12	9	8
Children in ad	10	10	7
Female(s) with diverse body type	9	11	11
Female(s) working	9	12	15
Female(s) & Male(s) equally prominent	8	13	12
Female lead aged 40-64	6	14	9
Characters with diversity of ethnic origin and skin colour diversity	5	15	16
No religious cues in ad	5	16	*

* Base too low last year

Difference between Top and Bottom Quartile of Female UM performance

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Drivers of positive Female portrayals are similar across markets with equal gender prominence and ethnic diversity more influential in Developed markets

⚢ **Advertising that drives "a positive image of the Female character that sets a good example for others" are those that:**

Legend: Presence, Perspective, Personality

Emerging Markets

Driver	Value
Female voiceover	27
Female(s) most prominent	21
Female(s) on screen ≥ 50% of time	20
Female speaking lines	16
Female(s) shown as Caring	14
Female(s) shown as Aspirational	14
Female(s) shown as Confident	10
Children in ad	10
Female(s) shown as Independent	10
Female(s) working	8
No religious cues in ad	5
Female(s) with diverse body types	5
Female(s) in traditional roles	5
Female lead aged 40-64	4
Female(s) in non traditional roles	4
Characters are heterosexual/straight	4

Developed Markets

Driver	Value
Female voiceover	33
Female on screen ≥ 50% of time	32
Female(s) most prominent	22
Female(s) shown as Caring	22
Female(s) shown as Confident	19
Female(s) shown as Aspirational	18
Female(s) shown with Personality	16
Female(s) shown as Independent	14
Female speaking lines	13
Female(s) with diverse body types	12
Equal prominence Males & Females	11
Female(s) working	9
Children in ad	9
Characters with both ethnic & skin diversity	9
No speaking lines	8
Female lead aged 40-64	6

Difference between Top and Bottom Quartile of Female UM performance

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The top 3 Female drivers are important for many markets

(#1): FEMALE VOICEOVER

#1 AUSTRALIA	#1 BRAZIL
#1 FRANCE	#1 ITALY
#1 JAPAN	#1 MEXICO
#1 UK	#2 INDIA
#3 USA	#5 GERMANY
#8 PHILIPPINES	#13 INDONESIA

(#2): FEMALE(S) ON SCREEN ≥50% OF TIME

#1 USA	#1 GERMANY
#2 UK	#2 FRANCE
#3 JAPAN	#4 INDONESIA
#5 MEXICO	#5 BRAZIL
#8 AUSTRALIA	#8 INDIA
#9 ITALY	#10 PHILIPPINES

(#3): FEMALE(S) MOST PROMINENT

#2 BRAZIL	#2 JAPAN
#2 INDONESIA	#3 AUSTRALIA
#3 FRANCE	#4 GERMANY
#6 ITALY	#6 USA
#9 MEXICO	#9 PHILIPPINES
#11 UK	#42 INDIA

(#) = GLOBAL RANKING   BOLD INDICATES #1 DRIVER OF POSITIVE FEMALE PORTRAYAL IN THAT MARKET

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Otherwise there are many differences, particularly in terms of Presence characteristics

(#4): FEMALE(S) SHOWN AS CARING
#1 PHILIPPINES, #2 USA

(#5): FEMALE(S) SHOWN AS ASPIRATIONAL
#3 GERMANY, #3 INDONESIA, #2 MEXICO

(#6): FEMALE(S) SHOWN AS CONFIDENT
#2 AUSTRALIA, #4 FRANCE

(#7): FEMALE(S) WITH SPEAKING LINES
#1 INDIA, #2 PHILIPPINES

(#8): FEMALE(S) WITH PERSONALITY
#4 BRAZIL, #2 GERMANY #5 ITALY, #3 MEXICO #4 PHILIPPINES

(#9): FEMALE(S) SHOWN AS INDEPENDENT
#6 AUSTRALIA, #4 MEXICO

(#10): CHILDREN IN AD
#1 INDONESIA, #3 PHILIPPINES

(#11): FEMALE(S) WITH DIVERSE BODY TYPES
#7 BRAZIL, #10 USA

(#12): FEMALE(S) WORKING
#8 AUSTRALIA

(#13): EQUAL PROMINENCE
#7 UK

(#14): FEMALE LEAD AGED 40-64
#7 INDONESIA

(#15): ETHNIC ORIGIN & SKIN DIVERSITY
#4 GERMANY, #5 INDONESIA, #2 ITALY, #4 UK, #4 USA

(#16): NO RELIGIOUS CUES
#10 BRAZIL, #5 FRANCE #8 JAPAN

(#18): FEMALE SHOWN IN TRADITIONAL ROLE
#9 INDONESIA

(#19): FEMALE SHOWN IN NON TRADITIONAL ROLE
#6 MEXICO

(#20): DIVERSITY OF SKIN COLOUR
#9 BRAZIL

(#27): CHARACTERS ARE HETEROSEXUAL
#7 PHILIPPINES

(#34): FEMALES SHOWN AS FUNNY
#9 ITALY

(#54): MALES MOST PROMINENT
#4 AUSTRALIA

(#) = GLOBAL RANKING   *BOLD INDICATES #1 DRIVER OF POSITIVE FEMALE PORTRAYAL IN THAT MARKET*

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To change stereotypical images of Men, having *Women* equally prominent is now a key driver, and Confident portrayals are important too

♂ **Advertising that drives "a positive image of the Male character that sets a good example for others" are those that:**

Legend: Presence, Perspective, Personality

	Ranking 2021	Ranking 2020
Male(s) shown as Caring — 26	1	1
Female(s) & Male(s) equally prominent — 19	2	7
Children in ad — 16	3	2
Male(s) shown as Aspirational — 14	4	4
Male(s) on screen ≥50% of time — 12	5	10
Male(s) shown as Confident — 11	6	*
Male(s) shown in a non traditional role — 10	7	6
Characters with diversity of ethnic origin and skin colour diversity — 8	8	5
Male(s) shown as Independent — 7	9	*
Male(s) & Female(s) working — 6	10	*
Male(s) with diverse body type — 6	11	9
Environmental/social message in ad — 5	12	8
Male voiceover — 5	13	*

* = not a driver last year

Difference between Top and Bottom Quartile of Male UM performance

#UNSTEREOTYPE ALLIANCE

KANTAR   2021 data based on Q420-Q321   33

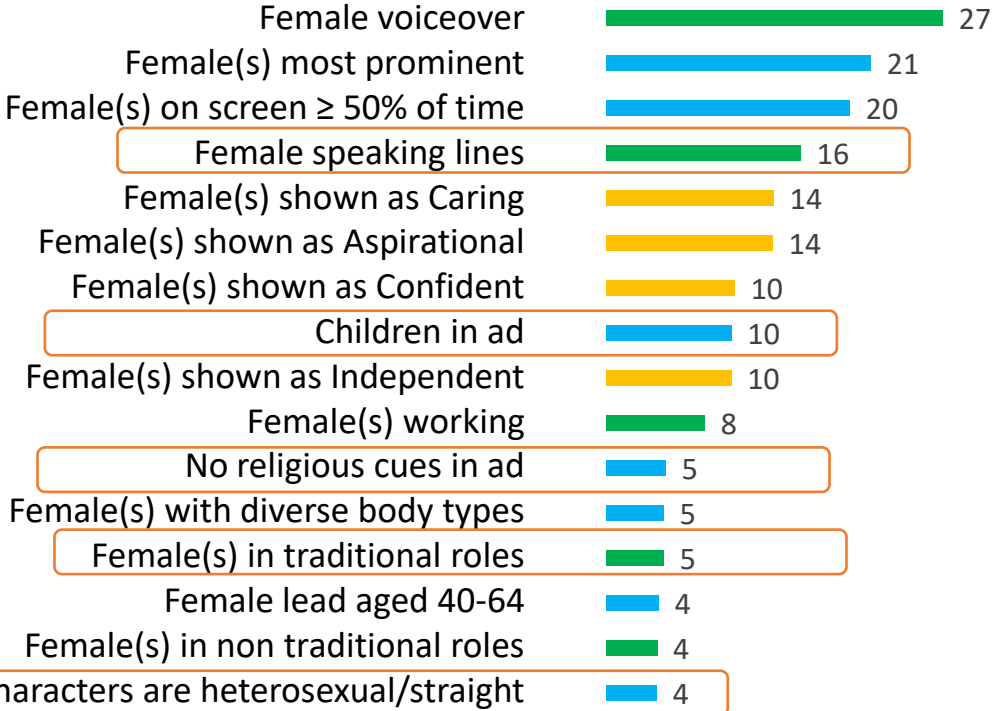# Drivers of positive Male portrayals are similar across markets with ethnic and body type diversity more influential in Developed markets
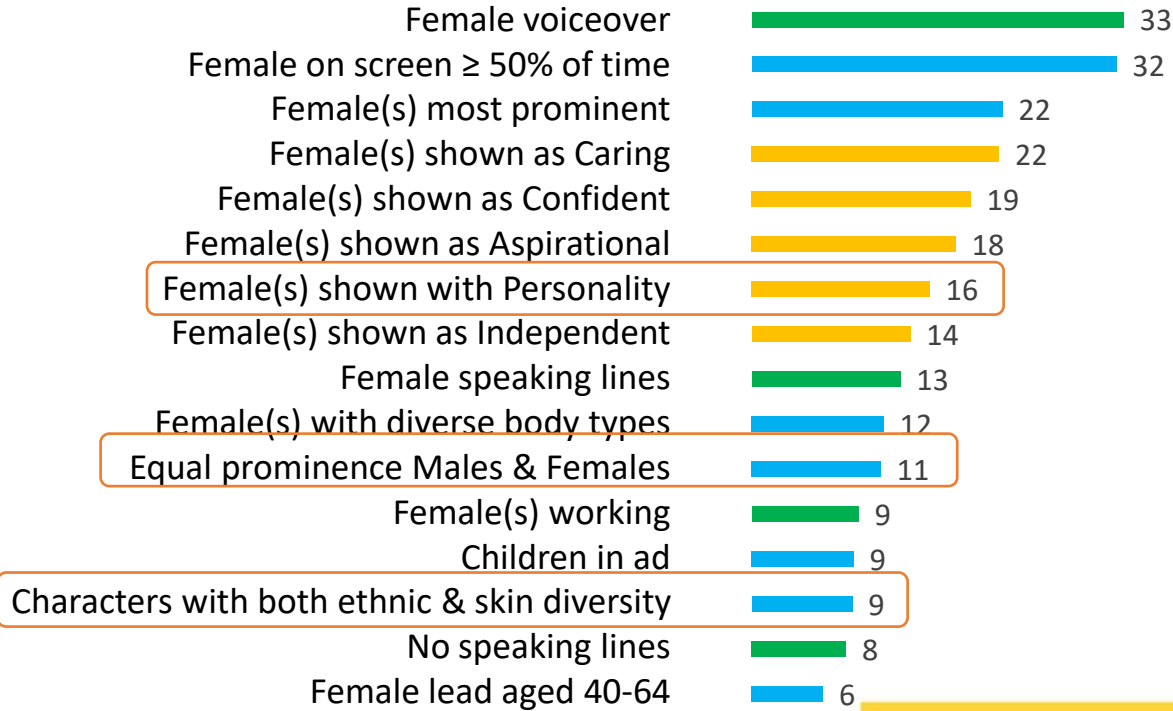
♂ **Advertising that drives "a positive image of the Male character that sets a good example for others" are those that:**

Legend: Presence, Perspective, Personality

Emerging Markets

Driver	Value
Female(s) & Male(s) equally prominent	18
Male(s) shown as Caring	14
Male(s) shown as Aspirational	11
Male(s) shown as Confident	11
Children in ad	10
Male(s) on screen ≥ 50% of time	10
Only Males in ad	7
Male(s) shown as Independent	7
Male(s) shown in non traditional role	6
Male(s) shown with Personality	5
Male voiceover	5
Both Female(s) & Male (s) speaking lines	5
Characters are heterosexual/straight	5

Developed Markets

Driver	Value
Male(s) shown as Caring	32
Female(s) & Male(s) equally prominent	20
Children in ad	20
Male(s) shown as Aspirational	16
Male on screen ≥ 50% of time	14
Diversity of ethnic origin & skin colour	12
Male(s) shown in non traditional role	12
Male(s) shown as Confident	11
Male(s) with diverse body type	9
Male(s) shown as Independent	8
Male(s) & Female(s) working	7
Environmental/social message in ad	7
Both Males & Females in ad	5

Difference between Top and Bottom Quartile of Male UM performance

#UNSTEREOTYPE ALLIANCE

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Much more variation across markets in Male drivers

♂ (#1): MALE(S) SHOWN AS CARING

#1 AUSTRALIA	**#1 FRANCE**
#1 GERMANY	**#1 ITALY**
#1 USA	#2 MEXICO
#2 UK	#5 INDIA
#6 JAPAN	#20 INDONESIA
#50 BRAZIL	

♂ (#2): MALE(S) & FEMALE(S) EQUALLY PROMINENT

#1 MEXICO	**#1 JAPAN**
#1 UK	#3 USA
#6 AUSTRALIA	#6 INDIA
#7 INDONESIA	#9 ITALY
#11 FRANCE	#13 BRAZIL
#15 GERMANY	

♂ (#3): CHILDREN IN AD

#2 USA	#3 FRANCE
#3 GERMANY	#4 ITALY
#4 INDONESIA	#8 AUSTRALIA
#10 MEXICO	#19 UK
#36 JAPAN	#52 INDIA
#54 BRAZIL	

(#) = GLOBAL RANKING   *BOLD INDICATES #1 DRIVER OF POSITIVE MALE PORTRAYAL IN THAT MARKET*

#UNSTEREOTYPE ALLIANCE

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Different characteristics are key drivers of positive male portrayals in different markets

(#7): MALE(S) SHOWN IN NON TRADITIONAL ROLE
#2 GERMANY, #3 ITALY

(#8): ETHNIC ORIGIN & SKIN DIVERSITY
#4 BRAZIL, #5 GERMANY
#4 USA

(#9): MALE(S) SHOWN AS INDEPENDENT
#2 AUSTRALIA, #4 MEXICO

(#11): MALE(S) WITH DIVERSE BODY TYPES
#5 BRAZIL, #5 UK, #6 USA

(#12):ENVIRONMENTAL/ SOCIAL MESSAGE
#8 UK, #9 USA

(#13): MALE VOICEOVER
#13 INDONESIA, #7 JAPAN
#7 USA

(#14): CHARACTERS ARE HETEROSEXUAL
#10 AUSTRALIA, #7 FRANCE
#12 INDIA,#7 ITALY, #6 MEXICO

(#15): DIVERSITY OF SKIN COLOUR
#7 BRAZIL

(#16): BOTH MALE & FEMALE VOICEOVER
#4 AUSTRALIA

(#17): ONLY MALES IN AD
#9 AUSTRALIA, #4 FRANCE
#6 ITALY, #8 JAPAN

(#18): MALES WITH PERSONALITY
#6 GERMANY, #5 MEXICO

(#19): MALES & FEMALES SPEAKING
#6 INDONESIA

(#20): BOTH MALES & FEMALES IN AD
#1 BRAZIL, #4 GERMANY
#8 USA

(#22): FEATURES A DISABLED CHARACTER
#6 BRAZIL, #4 JAPAN

(#24): ONLY MALES WORKING IN AD
#5 FRANCE

(#26): NO RELIGIOUS CUES IN AD
#10 FRANCE, #3 INDIA
#2 JAPAN

(#27): ONLY MALES SPEAKING
#1 INDONESIA, #9 JAPAN

(#42): MALES MOST PROMINENT
#8 INDONESIA

(#44): MALE LEAD AGED 20-39
#7 INDIA

(#49): MALE(S) SHOWN AS FUNNY
#9 INDIA

(#53): NO ETHNIC OR SKIN DIVERSITY
#1 INDIA

(#) = GLOBAL RANKING

BOLD INDICATES #1 DRIVER OF POSITIVE MALE PORTRAYAL IN THAT MARKET

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Do I&D characteristics drive Ad Enjoyment as well?

Understanding the characteristics that drive Enjoyment

- When looking at **what constitutes good advertising**, a good way of answering this is to look at what characteristics are present in ads that are at the **top** of the database on key creative metrics vs. the characteristics present in ads that are at the **bottom** of the database on key creative metrics

- One of the key creative metrics we look at here is **Ad Enjoyment** ….. Kantar's Ad Enjoyment metric ("How much would you enjoy watching this advert each time you see it on television") contributes to the validated Short Term Sales Likelihood score calculation which predicts the probability of the ad driving short term sales effects and also feeds into the long-term measure of Brand Pre-disposition, the validated Power score. It is a straight forward measure representing resonance/appreciation of the creative

- In the following analysis we can compare the I&D characteristics that drive positive gender portrayal – which we have already seen – vs. the I&D characteristics that drive Enjoyment to identify the **markers of both progressiveness AND entertainment value**

KANTAR

Many – but not all – of the drivers of positive gender portrayal also drive Ad Enjoyment

Difference between Top and Bottom Quartile of Enjoyment

Legend: Presence, Perspective, Personality

GLOBAL – TOP 10 I&D CHARACTERISTIC DRIVERS OF ENJOYMENT

1. Characters from different ethnic origins in a lead role — 9 *
2. No characters having speaking lines — 8
3. Showing Males aged 19 yrs or younger — 6
4. Showing diversity of skin colours & different ethnic origins — 5
5. Showing Males aged 40-64 yrs — 5
6. Showing Females as Caring — 4
7. Characters with different skin colours in a lead role — 4
8. Showing Males with diverse body types — 4
9. Having no real people in the ad — 3
10. Showing Males as Aspirational — 3
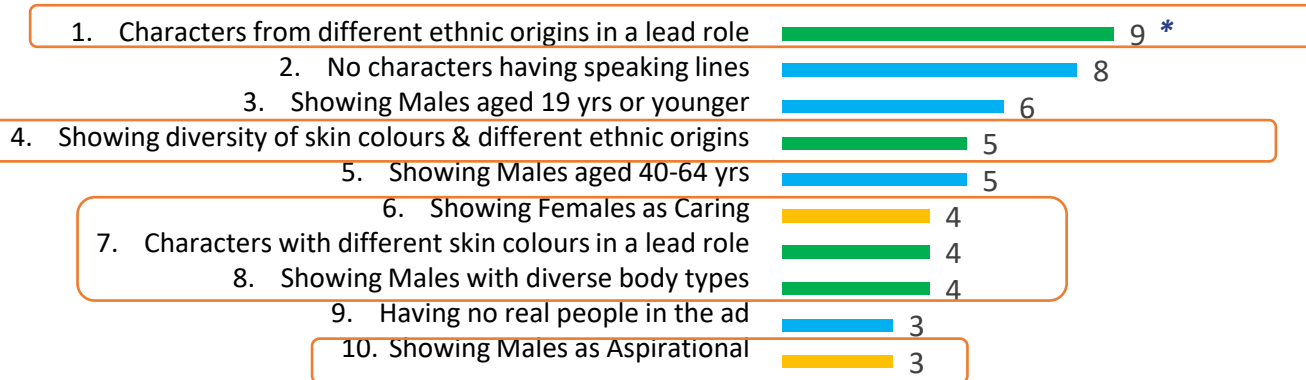
☐ = also a driver of positive gender portrayal

Female or Male presence alone does not particularly drive Enjoyment, nor does gender equality on screen. But **racial diversity** is key to driving both progressive portrayals and also entertainment

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India and Brazil are the top 2 markets where multiple I&D characteristics have an impact on how enjoyable an ad is seen to be

BRAZIL

Characteristic	Value
Having both genders in the ad	26
Shows 40-64 Females	23
Male voiceover	21
Shows 19 or younger Females	19
Shows Females with diverse body types	18
Shows diversity of skin colour	17
Shows Independent Females	13
Shows Confident Females	11
Shows Females in non traditional roles	8
Shows Males working	7
Shows Aspirational Females	-12
Shows Caring Females	-12
Shows Likeable Females	-14
Heterosexual/straight characters	-17
Shows Females only in the ad	-38
Female voiceover	-46

INDIA NORTH

Characteristic	Value
Females in ad	38
Females with speaking lines	29
Female voiceover	26
Females on screen >50%	17
Shows Males as Aspirational	16
Shows Females as Aspirational	15
Shows Females working	14
Males on screen <50%	12
Shows Females in traditional roles	9
Shows Females as Caring	9
Shows 19 or younger Males	8
Shows 40-64 Males	7

In **Brazil** we see gender, age inclusivity, ethnic diversity, body type diversity and personality portrayals all playing a key role in Enjoyment, showing how prominent and important I&D representation is in this market.

In contrast in **India**, the impact comes currently from gender, with a particular focus on Female presence

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A summary of the 2021 Key Headlines

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A L L I A N C E

The 2021 Key Headlines (1)

What difference do we see in response to the UM?

- Last year we saw that **COVID-19 had slowed progress** in the representation of progressive role models. 1 year later we have not only regained lost ground, but accelerated progress to see UM performance strengthening. We see little difference between market types, but a **stronger score amongst UA members**
- UM scores show that **Female portrayals tend to be a little stronger in most markets** and significantly stronger in the USA
- Female UM performance is highest in **Personal Care**, with performance strong for both gender portrayals in Non Alcoholic Drinks, OTC and Auto

Does having positive people portrayal in advertising improve ROI potential?

- Ads with a **high UM continue to predict greater ROI** for advertising investment
- The potential ROI impact of positive people portrayals is **stronger in Emerging markets**. A stronger impact is also seen for brands who have UA membership!
- Biggest impact is seen in LatAm, India and Turkey – these are the **markets where progressive portrayals make the most difference to overall ad quality**

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The 2021 Key Headlines (2)

I&D Characteristics – what changes are we seeing in advertising over time?

- Since 2018, **both** Women and Men are more likely to be present in advertising together, with **sole Male presence declining**
- In ads that have both Women and Men, **Women are increasingly being given a more prominent role**
- **Women are increasingly being given speaking lines** at the expense of sole Male narration
- Whilst Women have now been getting more time on screen, **Male presence is starting to slip away**
- Yet, both Women and Men are still **overwhelmingly portrayed in traditional roles**, with little change in 2021
- In 2021 we've seen a **big push on ethnic diversity in advertising**, but elsewhere representation continues to be limited
- **Ageism abounds** – especially for Women – though we are seeing **good progress** here!

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The 2021 Key Headlines (3)

Which of the I&D characteristics DRIVE positive people portrayal – and has this changed?
- **Presence** remains key for **Women**, but **Confident characterizations** have risen in importance
- Drivers of positive Female portrayals are similar across markets with equal gender prominence and ethnic diversity more influential in Developed markets

- To change stereotypical images of **Men**, **having *Women* equally prominent** is now a key driver, and **Confident** portrayals are important too
- Drivers of positive Male portrayals are similar across markets with ethnic and body type diversity more influential in Developed markets

Do I&D characteristics drive Ad Enjoyment as well?
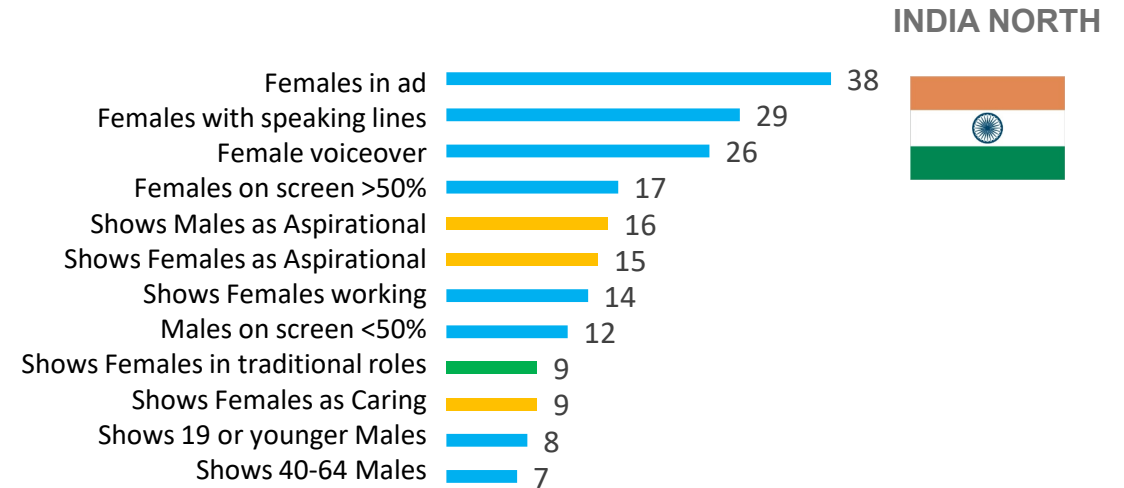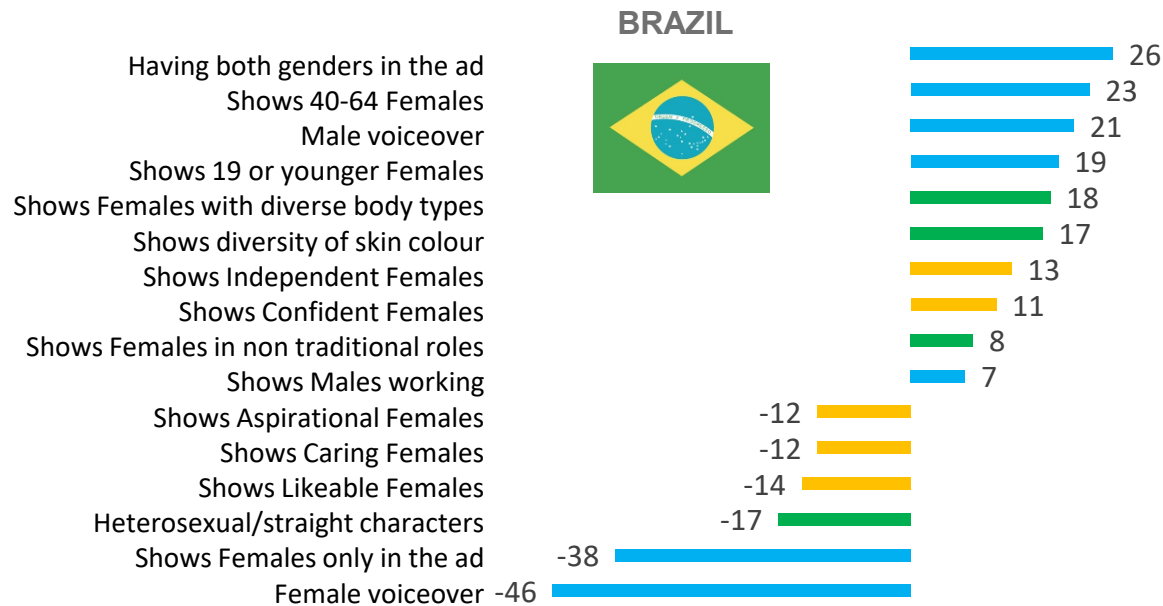- **Many – but not all – of the drivers of positive gender portrayal also drive Ad Enjoyment**
- Female or Male presence alone does not particularly drive Enjoyment, nor does gender equality on screen. But **racial diversity is key to driving both progressive portrayals and also entertainment**

#UNSTEREOTYPE
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APPENDIX

UM scores show that Female portrayals tend to be a little stronger in most markets and significantly stronger in the USA

UM Score (Top 2 box %) - Female & Male, by Country

Row 1 (Female / Male):
- Argentina: 54% / 52%
- Australia: 57% / 55%
- Belgium: 55% / 49%
- Brazil: 83% / 79%
- Canada - English speaking: 62% / 59%
- Canada - French speaking: 61% / 58%
- Chile: 43% / 43%
- China Beijing: 87% / 83%
- China Secondary Cities East: 93% / 78%
- China Secondary Cities South: 92% / 82%
- China Shanghai: 91% / 89%
- China Tertiary: 88% / 90%
- Colombia: 75% / 70%
- Czech Republic: 40% / 41%
- Denmark: 39% / 35%
- Ecuador: 80% / 76%
- France: 67% / 64%
- Germany: 57% / 54%
- Greece: 46% / 43%

Row 2 (Female / Male):
- Hungary: 57% / 55%
- India East: 97% / 95%
- India Mumbai: 97% / 94%
- India North: 97% / 96%
- India Rest of South: 97% / 95%
- India Rest of West: 96% / 95%
- India Tamil Nadu: 95% / 94%
- Indonesia: 95% / 93%
- Ireland: 54% / 56%
- Italy: 69% / 65%
- Japan: 37% / 30%
- Kenya: 94% / 88%
- Korea: 40% / 37%
- Malaysia: 83% / 77%
- Mexico: 79% / 75%
- Netherlands: 48% / 46%
- New Zealand: 39% / 42%
- Nigeria: 92% / 89%
- Pakistan: 96% / 94%

Row 3 (Female / Male):
- Peru: 62% / 63%
- Philippines: 94% / 90%
- Poland: 54% / 51%
- Portugal: 54% / 57%
- Romania: 58% / 59%
- Russia: 57% / 51%
- Saudi Arabia: 87% / 83%
- Serbia: 58% / 61%
- Slovakia: 47% / 48%
- South Africa (SEM SG 2-3): 91% / 83%
- South Africa (SEM SG 4-5): 89% / 81%
- Spain: 57% / 54%
- Sweden: 41% / 43%
- Switzerland: 52% / 49%
- Thailand: 91% / 87%
- Turkey: 81% / 77%
- UK: 61% / 57%
- USA: 71% / 66%
- Vietnam: 88% / 78%

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■ Female UM T2Box   ■ Male UM T2Box   ☐ = UM Female score significantly higher than UM Male score

Data based on all tests 2019 onwards

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When we look at what holds back Enjoyment, it's clear that Male dominance and not placing enough importance on ethnic diversity are barriers here

Difference between Top and Bottom Quartile of Enjoyment

Legend: Presence, Perspective, Personality

GLOBAL – TOP 10 I&D CHARACTERISTIC DRIVERS OF ENJOYMENT

1. Characters from different ethnic origins in a lead role — 9 *
2. No characters having speaking lines — 8
3. Showing Males aged 19 yrs or younger — 6
4. Showing diversity of skin colours & different ethnic origins — 5
5. Showing Males aged 40-64 yrs — 5
6. Showing Females as Caring — 4
7. Characters with different skin colours in a lead role — 4
8. Showing Males with diverse body types — 4
9. Having no real people in the ad — 3
10. Showing Males as Aspirational — 3
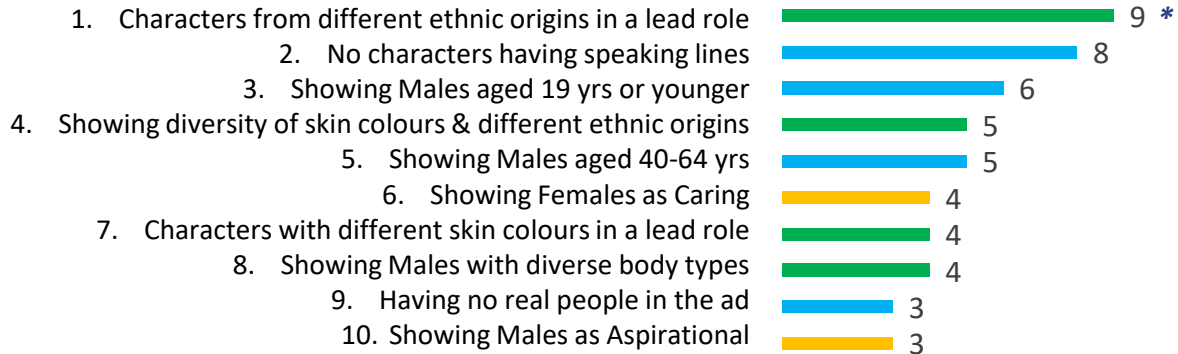
GLOBAL – TOP 10 I&D CHARACTERISTIC BARRIERS TO ENJOYMENT
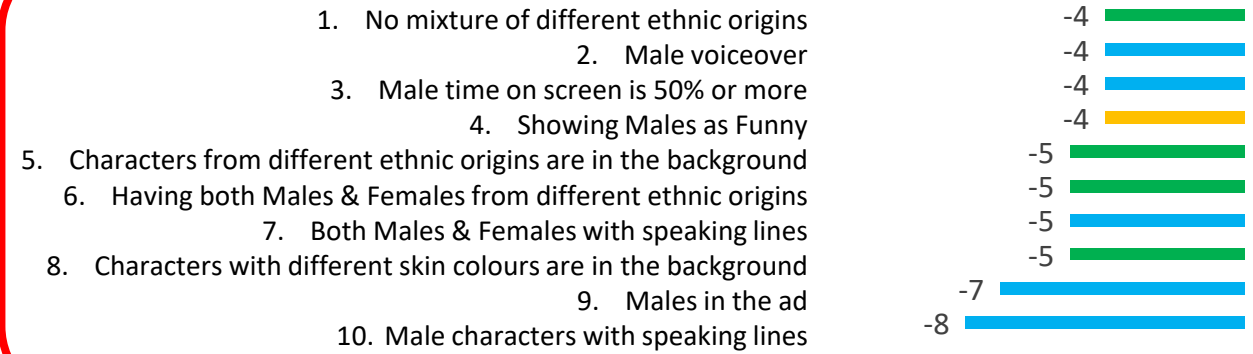
1. No mixture of different ethnic origins — -4
2. Male voiceover — -4
3. Male time on screen is 50% or more — -4
4. Showing Males as Funny — -4
5. Characters from different ethnic origins are in the background — -5
6. Having both Males & Females from different ethnic origins — -5
7. Both Males & Females with speaking lines — -5
8. Characters with different skin colours are in the background — -5
9. Males in the ad — -7
10. Male characters with speaking lines — -8

Note: By barriers to enjoyment we mean that presence of these characteristics can play a role in people NOT enjoying an ad. Important to bear in mind that in some markets these are reflective of the country context and engrained stereotypes and that each market is at a different point in creating progressive content, so this shouldn't hold back desire to drive more progressive depictions in creative.

#UNSTEREOTYPE ALLIANCE

KANTAR   *Only Driver where there is a significant difference between the top and bottom quartile on Enjoyment*

48

In some markets I&D characteristics are very prominent in driving Enjoyment, n others they have lower impact

 # OF I&D CHARACTERISTICS THAT DRIVE ENYOYMENT

India	Brazil	Mexico	Poland	Russia	Germany	Italy	Australia	Indonesia	Philippines	Africa/Middle East	USA	UK	Canada	France	Japan	China	Chile	Thailand	Spain
14	10	10	10	10	9	9	9	9	8	8	6	6	5	5	5	3	2	2	0

 # OF I&D CHARACTERISTICS THAT ARE BARRIERS TO ENYOYMENT

India	Brazil	Mexico	Poland	Russia	Germany	Italy	Australia	Indonesia	Philippines	Africa/Middle East	USA	UK	Canada	France	Japan	China	Chile	Thailand	Spain
10	6	5	5	15	9	6	3	9	5	3	1	9	4	6	10	5	1	0	2

#UNSTEREOTYPE ALLIANCE

KANTAR *Drivers & Barriers counted only when there is a significant difference between the top and bottom quartile on Enjoyment*

49

I&D Drivers of & Barriers to Enjoyment- North America

Difference between Top and Bottom Quartile of Enjoyment

Legend: Presence, Perspective, Personality

CANADA

Characteristic	Value
Female(s) on screen >50% of the time	34
Female(s) with personality	14
Female characters most prominent	13
Shows Confident Females	8
Shows 65+ Males	8
Shows Males as Funny	-11
Heterosexual/straight characters	-12
Shows Females with diverse body types	-20
No speaking lines for characters	-23

USA

Characteristic	Value
Shows 20-39 Females	17
Shows Males with diverse body types	15
Shows 20-39 Males	10
Shows Aspirational Females	8
Shows Aspirational Males	8
Does not show Females in traditional roles	6
Shows Likeable Males	-7

Note: By barriers to enjoyment we mean that presence of these characteristics can play a role in people NOT enjoying an ad. Important to bear in mind that in some markets these are reflective of the country context and engrained stereotypes and that each market is at a different point in creating progressive content, so this shouldn't hold back desire to drive more progressive depictions in creative.

#UNSTEREOTYPE ALLIANCE

KANTAR *Drivers & Barriers shown only when there is a significant difference between the top and bottom quartile on Enjoyment*

I&D Drivers of & Barriers to Enjoyment- LatAm (1)

Difference between Top and Bottom Quartile of Enjoyment

Legend: Presence, Perspective, Personality

BRAZIL
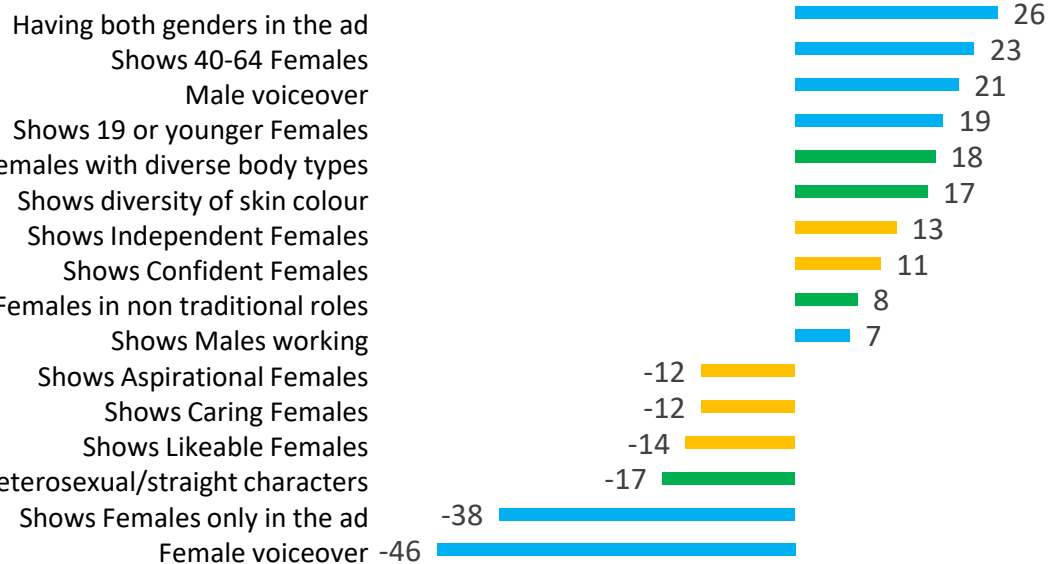
Having both genders in the ad	26
Shows 40-64 Females	23
Male voiceover	21
Shows 19 or younger Females	19
Shows Females with diverse body types	18
Shows diversity of skin colour	17
Shows Independent Females	13
Shows Confident Females	11
Shows Females in non traditional roles	8
Shows Males working	7
Shows Aspirational Females	-12
Shows Caring Females	-12
Shows Likeable Females	-14
Heterosexual/straight characters	-17
Shows Females only in the ad	-38
Female voiceover	-46

CHILE

Shows Independent Females	15
Shows 40-64 Males	15
No people in the ad	-9

Note: By barriers to enjoyment we mean that presence of these characteristics can play a role in people NOT enjoying an ad. Important to bear in mind that in some markets these are reflective of the country context and engrained stereotypes and that each market is at a different point in creating progressive content, so this shouldn't hold back desire to drive more progressive depictions in creative.

#UNSTEREOTYPE ALLIANCE

I&D Drivers of & Barriers to Enjoyment- LatAm (2)

Difference between Top and Bottom Quartile of Enjoyment

Legend: Presence, Perspective, Personality

MEXICO

Characteristic	Value
No one speaking	25
Does not show Males as Funny	21
No religious cues in ad	20
Female voiceover	15
Shows Males as Aspirational	11
Shows Males as Caring	11
Shows Females as Aspirational	9
Shows diversity of skin colour	9
No people in the ad	8
Shows Females in a non traditional role	8
Shows Females as Likeable	6
Has Males with speaking lines	-7
Has Females in ad	-12
Shows Females 19 or younger	-14
Male voiceover	-16
Has Females with speaking lines	-16

Note: By barriers to enjoyment we mean that presence of these characteristics can play a role in people NOT enjoying an ad. Important to bear in mind that in some markets these are reflective of the country context and engrained stereotypes and that each market is at a different point in creating progressive content, so this shouldn't hold back desire to drive more progressive depictions in creative.
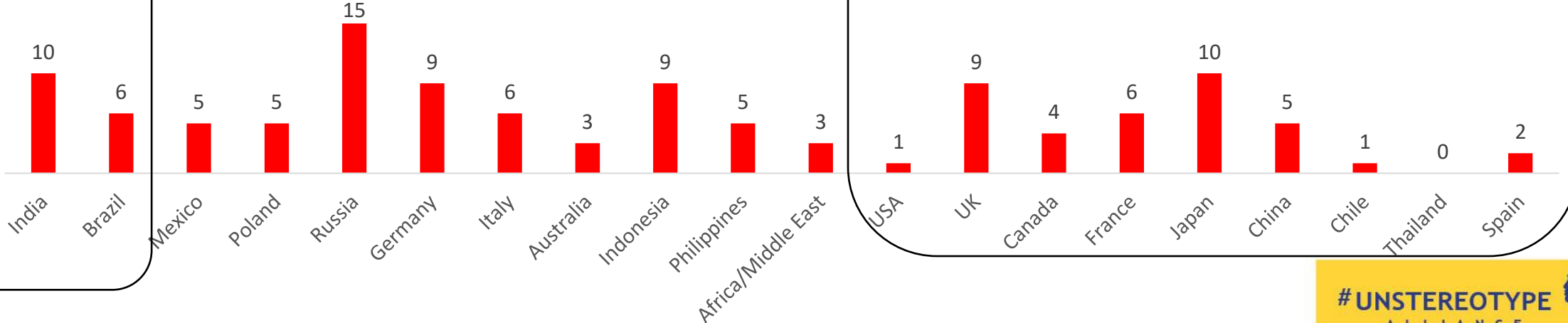
#UNSTEREOTYPE
ALLIANCE

KANTAR

Drivers & Barriers shown only when there is a significant difference between the top and bottom quartile on Enjoyment

52

I&D Drivers of & Barriers to Enjoyment- Europe (1)

Difference between Top and Bottom Quartile of Enjoyment

Legend: Presence, Perspective, Personality

FRANCE

No ethnic diversity	20
Shows 40-64 Males	17
No people in ad	10
Shows Females as Caring	10
Shows Females as Funny	9
Shows diversity of skin colour	-9
Shows Males as Likeable	-9
Shows Males as Caring	-10
Female voiceover	-12
Shows Males as Independent	-12
Shows diversity of skin colour & ethnic origin	-13

GERMANY

No speaking lines	18
Shows diversity of skin colour & ethnic origin	15
Shows 19 or younger Males	12
Males in ad	10
No people in ad	9
Shows 19 or younger Females	8
Shows Males as Independent	8
Both Males & Females working	5
Shows Males as Foolish	5
Shows Females as Funny	-7
Shows Females with personality	-10
Shows 65+ Males	-10
Females in ad	-23

Note: By barriers to enjoyment we mean that presence of these characteristics can play a role in people NOT enjoying an ad. Important to bear in mind that in some markets these are reflective of the country context and engrained stereotypes and that each market is at a different point in creating progressive content, so this shouldn't hold back desire to drive more progressive depictions in creative.

#UNSTEREOTYPE
ALLIANCE

KANTAR *Drivers & Barriers shown only when there is a significant difference between the top and bottom quartile on Enjoyment*

I&D Drivers of & Barriers to Enjoyment - Europe (2)

Difference between Top and Bottom Quartile of Enjoyment

Legend: Presence, Perspective, Personality

ITALY

Characteristic	Value
Shows 40-64 Males	22
Shows Males with diverse body types	19
Shows Males as Aspirational	16
Shows Males as Confident	16
No speaking lines	15
Shows diversity of skin colour & ethnic origin	14
Males & Females in ad	13
Shows Males as Independent	13
Shows diversity of skin colour	12
Shows Females working	-5
Shows Females as Sexualised	-7
Females with speaking lines	-9
Shows Females as Confident	-10
Heterosexual/straight characters	-16
Male voiceover	-20

POLAND

Characteristic	Value
No speaking lines	23
Shows Males with personality	20
Shows Females with personality	19
Shows 20-39 Males	17
Shows Males as Caring	17
Shows 19 or younger Females	15
Shows diversity of skin colour & ethnic origin	11
Shows Females as Independent	10
Shows Males in non traditional roles	10
Shows Males as Aspirational	9
Shows Males as Authoritative	-11
Shows Males as Likeable	-12
Males in ad	-16
Male voiceover	-19
Males & Females with speaking lines	-22

Note: By barriers to enjoyment we mean that presence of these characteristics can play a role in people NOT enjoying an ad. Important to bear in mind that in some markets these are reflective of the country context and engrained stereotypes and that each market is at a different point in creating progressive content, so this shouldn't hold back desire to drive more progressive depictions in creative.
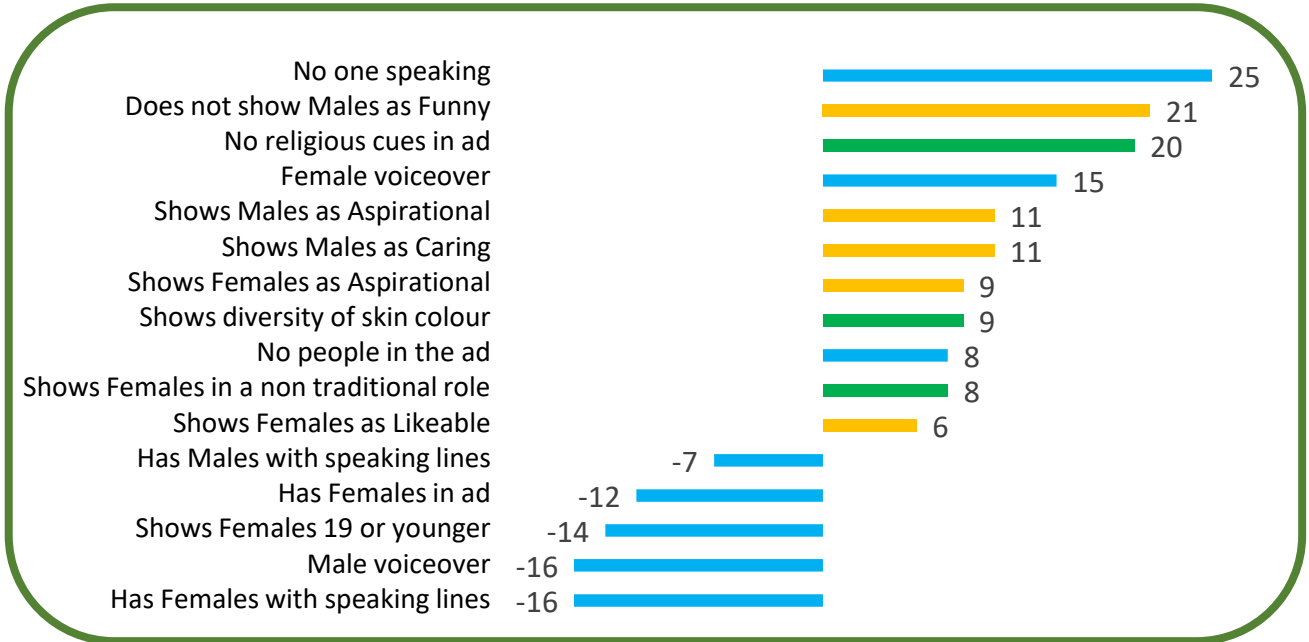
#UNSTEREOTYPE
ALLIANCE

KANTAR *Drivers & Barriers shown only when there is a significant difference between the top and bottom quartile on Enjoyment*

I&D Drivers of & Barriers to Enjoyment - Europe (3)

Difference between Top and Bottom Quartile of Enjoyment

Legend: Presence, Perspective, Personality

RUSSIA

Driver	Value
Shows 40-64 Males	20
Shows Males as Caring	18
No one speaking	17
Female voiceover	16
Sows Females as Caring	14
Females in ad	13
Males with speaking lines	11
Females on screen >50%	11
Shows Males in non traditional roles	7
Shows diversity of skin colour	4
Shows Males working	-5
Shows Females as Independent	-7
Shows Females as Foolish	-7
Shows overweight Females	-7
Shows Males as Confident	-8
Shows Males & Females working	-8

Barrier	Value
Shows Females in non traditional roles	-9
Males & Females speaking	-11
Shows Males in traditional roles	-13
Shows Males as Funny	-15
Males on screen >50%	-16
Shows 20-39 Males	-17
Shows Female as Funny	-17
Male voiceover	-22
Males in ad	-22

Note: By barriers to enjoyment we mean that presence of these characteristics can play a role in people NOT enjoying an ad. Important to bear in mind that in some markets these are reflective of the country context and engrained stereotypes and that each market is at a different point in creating progressive content, so this shouldn't hold back desire to drive more progressive depictions in creative.

#UNSTEREOTYPE
ALLIANCE

KANTAR   *Drivers & Barriers shown only when there is a significant difference between the top and bottom quartile on Enjoyment*

55

I&D Drivers of & Barriers to Enjoyment - Europe (4)

Difference between Top and Bottom Quartile of Enjoyment

Legend: Presence, Perspective, Personality

SPAIN

UK

Shows Females as Independent	-16
Shows Females as Aspirational	-11

No characters speaking	13
No people in ad	10
Males & Females working	8
Shows Males as Funny	8
Shows Males as Aspirational	6
Shows 65+ Males	4
Shows Females working	-6
Shows 19 or younger Females	-8
Shows Males with diverse body types	-9
Females with speaking lines	-10
Shows 40-64 Females	-10
Shows Females with personality	-11
Shows Females as Funny	-12
Shows Females with diverse body types	-17
Females on screen >50%	-18

Note: By barriers to enjoyment we mean that presence of these characteristics can play a role in people NOT enjoying an ad. Important to bear in mind that in some markets these are reflective of the country context and engrained stereotypes and that each market is at a different point in creating progressive content, so this shouldn't hold back desire to drive more progressive depictions in creative.
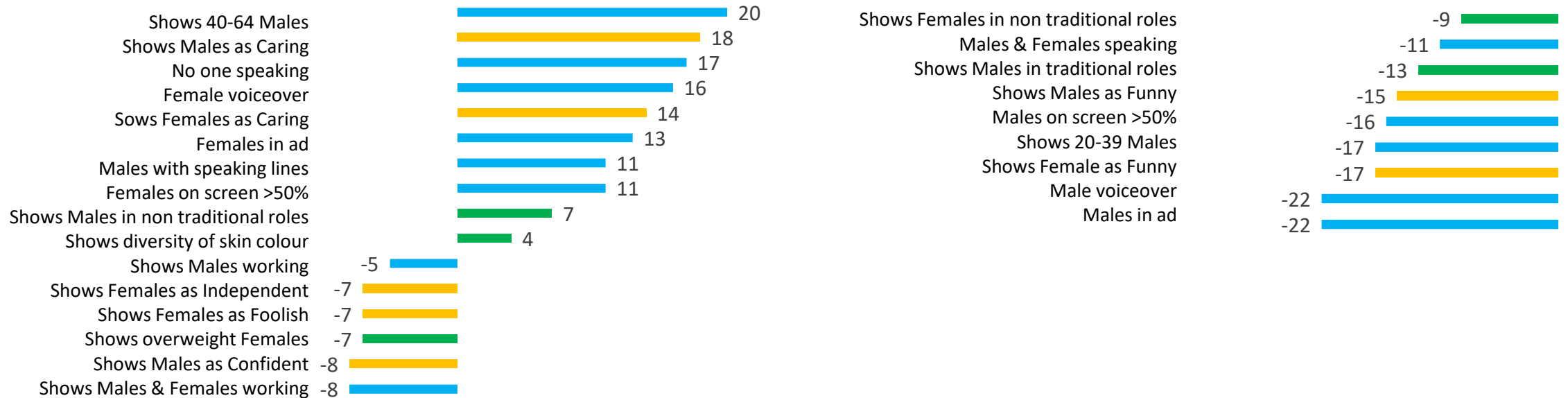
#UNSTEREOTYPE ALLIANCE

KANTAR *Drivers & Barriers shown only when there is a significant difference between the top and bottom quartile on Enjoyment*

I&D Drivers of & Barriers to Enjoyment - APAC (1)

Difference between Top and Bottom Quartile of Enjoyment

Legend: Presence, Perspective, Personality

AUSTRALIA

CHINA
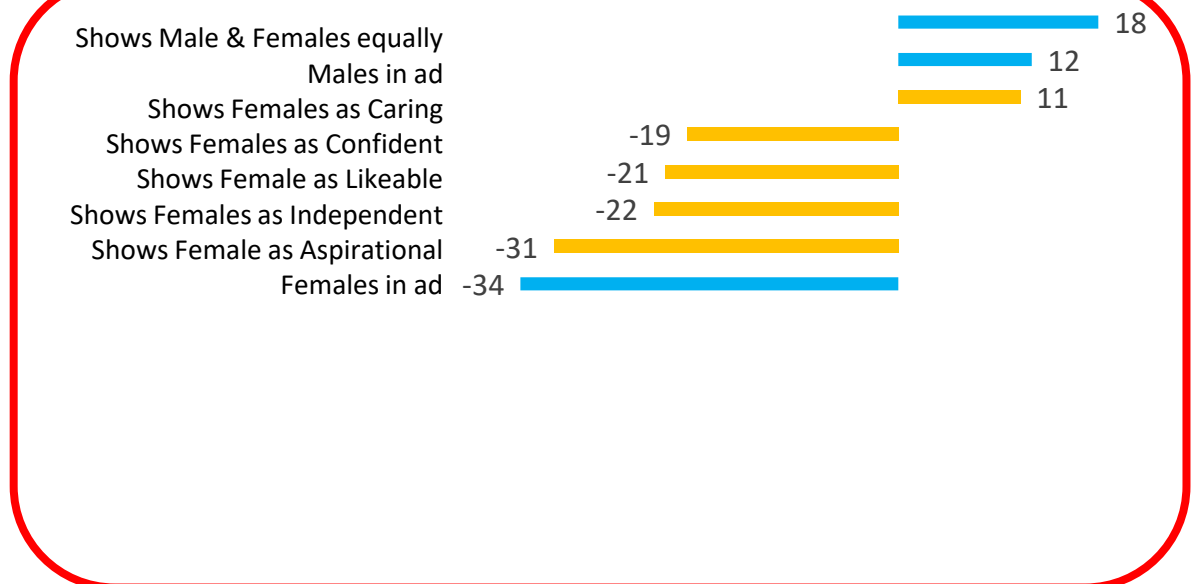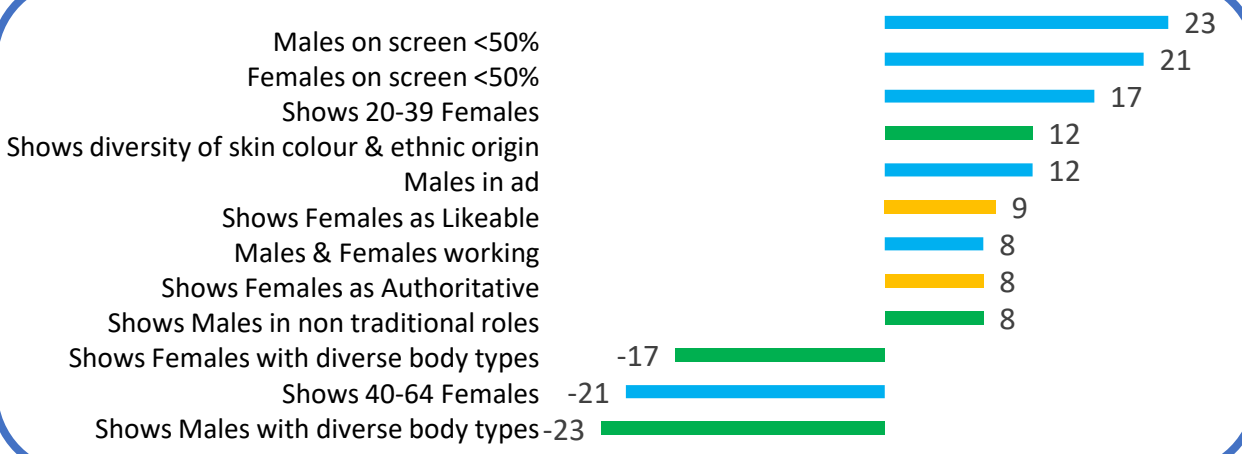
Australia

Category	Value
Males on screen <50%	23
Females on screen <50%	21
Shows 20-39 Females	17
Shows diversity of skin colour & ethnic origin	12
Males in ad	12
Shows Females as Likeable	9
Males & Females working	8
Shows Females as Authoritative	8
Shows Males in non traditional roles	8
Shows Females with diverse body types	-17
Shows 40-64 Females	-21
Shows Males with diverse body types	-23

China

Category	Value
Shows Male & Females equally	18
Males in ad	12
Shows Females as Caring	11
Shows Females as Confident	-19
Shows Female as Likeable	-21
Shows Females as Independent	-22
Shows Female as Aspirational	-31
Females in ad	-34

Note: By barriers to enjoyment we mean that presence of these characteristics can play a role in people NOT enjoying an ad. Important to bear in mind that in some markets these are reflective of the country context and engrained stereotypes and that each market is at a different point in creating progressive content, so this shouldn't hold back desire to drive more progressive depictions in creative.

#UNSTEREOTYPE
ALLIANCE

KANTAR   *_Drivers & Barriers shown only when there is a significant difference between the top and bottom quartile on Enjoyment_*

57

I&D Drivers of & Barriers to Enjoyment - APAC (2)

Difference between Top and Bottom Quartile of Enjoyment

Legend: Presence, Perspective, Personality

INDIA NORTH

Females in ad	38
Females with speaking lines	29
Female voiceover	26
Females on screen >50%	17
Shows Males as Aspirational	16
Shows Females as Aspirational	15
Shows Females working	14
Males on screen <50%	12
Shows Females in traditional roles	9
Shows Females as Caring	9
Shows 19 or younger Males	8
Shows 40-64 Males	7

No religious cues in ad	7
Male & Female voiceover	5
Shows 20-39 Females	-5
Males & Females working	-7
Shows Females as diverse body types	-8
Shows Females as Funny	-8
Males with speaking lines	-9
Males & Females with speaking lines	-9
No one with speaking lines	-12
Males & Females in ad	-19
Males in ad	-19
Male voiceover	-27

Note: By barriers to enjoyment we mean that presence of these characteristics can play a role in people NOT enjoying an ad. Important to bear in mind that in some markets these are reflective of the country context and engrained stereotypes and that each market is at a different point in creating progressive content, so this shouldn't hold back desire to drive more progressive depictions in creative.
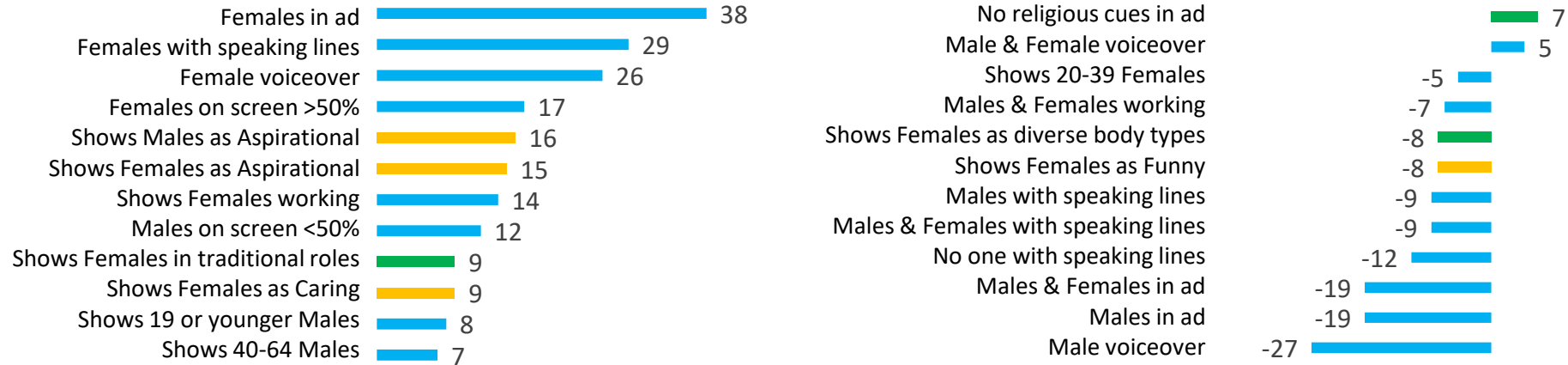
#UNSTEREOTYPE ALLIANCE

KANTAR   *Drivers & Barriers shown only when there is a significant difference between the top and bottom quartile on Enjoyment*

58

I&D Drivers of & Barriers to Enjoyment - APAC (3)

INDONESIA

Difference between Top and Bottom Quartile of Enjoyment

Legend: Presence, Perspective, Personality

JAPAN

Indonesia	Value
Females with speaking lines	32
Female voiceover	28
Females in ad	27
Shows Females as Caring	26
Females on screen >50%	20
Shows Females in Traditional role	18
Shows 19 or younger Males	16
Males & Females in ad	9
Religious cues in ad	7
Male & Female voiceover	-7
Shows Males working	-11
Shows Males as Confident	-11
Males with speaking lines	-12
Shows Males as Funny	-14
Male voiceover	-22
Males on screen >50%	-22
Shows 20-39 Males	-24
Males in ad	-36

Japan	Value
Males & Females with speaking lines	15
Male voiceover	12
Both Males & Females in ad	11
Shows Males as Independent	8
Shows Females as Independent	7
Shows 65+ Males	-6
Shows 19 or younger Males	-9
Shows Males in traditional roles	-9
Shows Females as Likeable	-9
Shows Males & Females working	-9
Shows Females as Aspirational	-12
Shows Males as Aspirational	-13
Females in ad	-14
Shows Males working	-15
Female voiceover	-15

Note: By barriers to enjoyment we mean that presence of these characteristics can play a role in people NOT enjoying an ad. Important to bear in mind that in some markets these are reflective of the country context and engrained stereotypes and that each market is at a different point in creating progressive content, so this shouldn't hold back desire to drive more progressive depictions in creative.
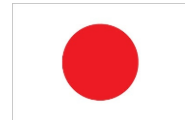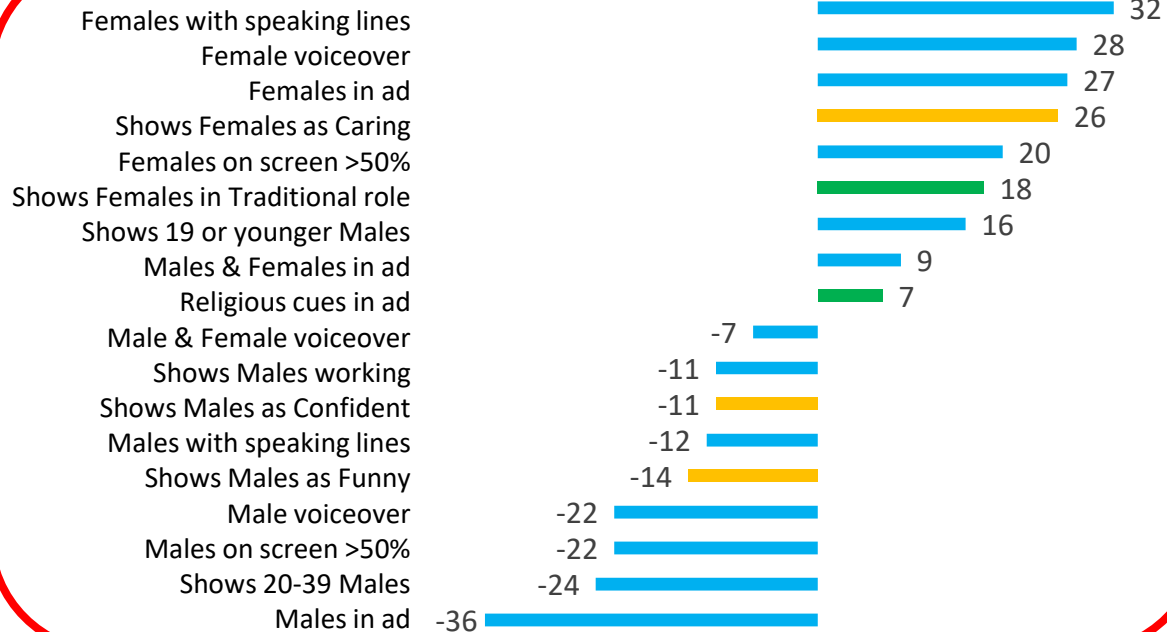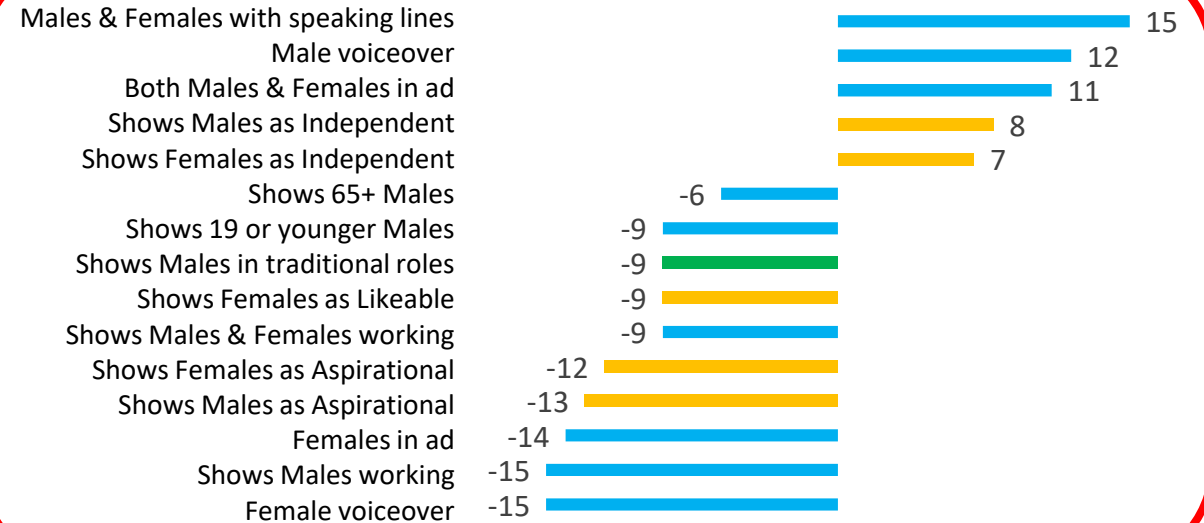
#UNSTEREOTYPE ALLIANCE

KANTAR

Drivers & Barriers shown only when there is a significant difference between the top and bottom quartile on Enjoyment

I&D Drivers of & Barriers to Enjoyment - APAC (4)

Difference between Top and Bottom Quartile of Enjoyment

Legend: Presence, Perspective, Personality

PHILIPPINES
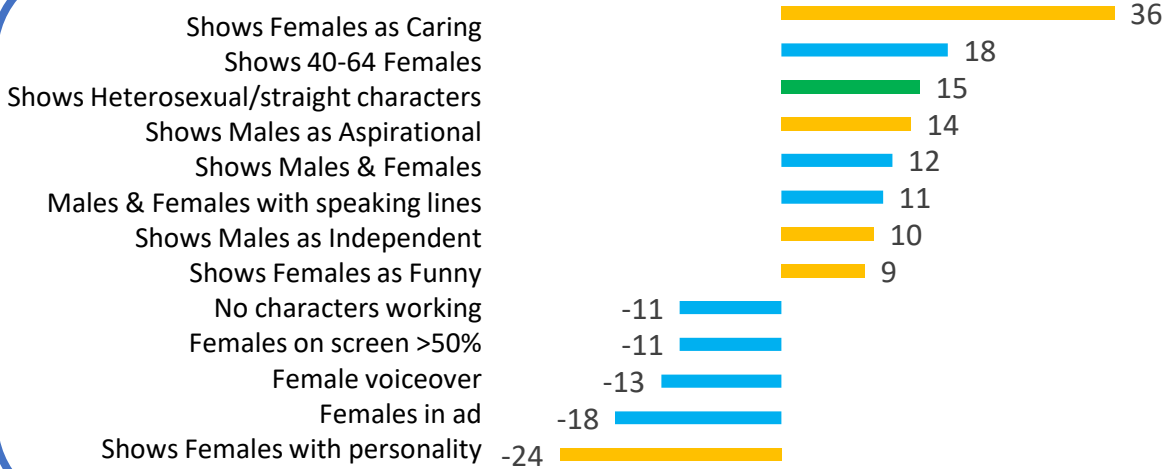
Shows Females as Caring	36
Shows 40-64 Females	18
Shows Heterosexual/straight characters	15
Shows Males as Aspirational	14
Shows Males & Females	12
Males & Females with speaking lines	11
Shows Males as Independent	10
Shows Females as Funny	9
No characters working	-11
Females on screen >50%	-11
Female voiceover	-13
Females in ad	-18
Shows Females with personality	-24

THAILAND

Shows Females as Confident	20
Shows Females as Caring	15

Note: By barriers to enjoyment we mean that presence of these characteristics can play a role in people NOT enjoying an ad. Important to bear in mind that in some markets these are reflective of the country context and engrained stereotypes and that each market is at a different point in creating progressive content, so this shouldn't hold back desire to drive more progressive depictions in creative.
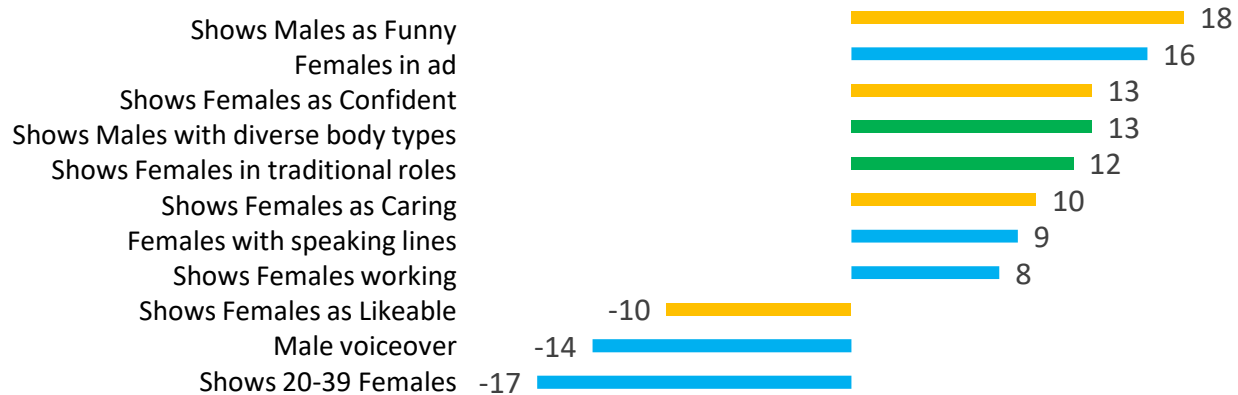
#UNSTEREOTYPE
ALLIANCE

KANTAR *Drivers & Barriers shown only when there is a significant difference between the top and bottom quartile on Enjoyment*

60

I&D Drivers of & Barriers to Enjoyment - Africa/Middle East

Difference between Top and Bottom Quartile of Enjoyment

Legend: Presence, Perspective, Personality

AFRICA / MIDDLE EAST

Category	Value
Shows Males as Funny	18
Females in ad	16
Shows Females as Confident	13
Shows Males with diverse body types	13
Shows Females in traditional roles	12
Shows Females as Caring	10
Females with speaking lines	9
Shows Females working	8
Shows Females as Likeable	-10
Male voiceover	-14
Shows 20-39 Females	-17

Note: By barriers to enjoyment we mean that presence of these characteristics can play a role in people NOT enjoying an ad. Important to bear in mind that in some markets these are reflective of the country context and engrained stereotypes and that each market is at a different point in creating progressive content, so this shouldn't hold back desire to drive more progressive depictions in creative.

#UNSTEREOTYPE ALLIANCE

KANTAR *Drivers & Barriers shown only when there is a significant difference between the top and bottom quartile on Enjoyment*