# DE&I DECODED:

## DIVERSITY, EQUITY & INCLUSION

# APAC

FLEISHMAN
HILLARD

# INTRODUCTION:

## Diversity, Equity and Inclusion
## Redefined in a Connected, Global World

Global consciousness of diversity, equity and inclusion (DE&I) has grown over the past several years, demanding that we ask new questions. Namely: How can governments, organizations and businesses cater to stakeholders' needs when those needs (and the beliefs that shape them) vary significantly from market to market, from group to group, and from person to person?

This is a question that all leaders and organizations should be asking, and that we at FleishmanHillard have put extensive thought into. Asia Pacific, the world's most populous region, with its deep history and dynamism, must be integral to any global DE&I strategy.

The region, representing a wide array of people, culture and beliefs, is home to more than 4.5 billion people who speak more than 2,000 languages and represent hundreds of different ethnicities, religions, and groups.

This is the first in a new series of reports to ensure we take an informed view to unpack the nuances of DE&I in different markets. With the results of this new research, we now have a deeper understanding of the definitions of DE&I, the perceptions, and needs of people in the region, and an understanding of how different organizations can create effective partnerships, educations, and resources that lead to a more inclusive and equitable world. As someone who has lived and worked in many different parts of Asia Pacific on DE&I issues throughout my career, I know this research will inform my own work with our more than 100 clients — and that it will be a valuable resource to many others.

In the business, policy, and social spheres, we've seen so much progress in the region. Still, the research highlights that there are unmet needs, actions to be taken — and most importantly, listening and knowledge sharing to be done. As organizations seek to understand and localize concepts of DE&I in Asia Pacific, making decisions with intention, based on data and feedback from individuals, will bolster progress.

**Leela Stake,**
Global Lead, True MOSAIC,
Diversity, Equity & Inclusion Practice
and FH4Inclusion

# OVERVIEW:

## Setting a Benchmark

The research results touch on a number of topics that not only show the state of DE&I today, but also give an indication of future needs. Having a data set of 5,000+ people allows us to set a powerful new benchmark to drive thinking and enhanced actions on DE&I in Asia Pacific.

The new benchmark also showcases the need for organizations to drastically rethink the way they are engaging with various stakeholder groups in the region. The way that DE&I topics are defined, communicated, or engaged across the data shows that there is a craving for more information and education. The companies that are able to realign their strategies and refocus their activities in the region to add nuance to their global strategies will be those that come out on top. Across markets and demographics, people in Asia Pacific value organizational investment in DE&I and prioritize it in their brand preference.

To understand where, and how, organizations should engage, we've showcased results related to familiarity with DE&I, the underlying perceptions and priorities in the way people define DE&I, their needs and areas they engage, and expected actions from organizations.

### FAMILIARITY

How familiar is the population with the concept of DE&I?

### PERCEPTIONS

What topics and issues do people associate with DE&I?

### NEEDS

What future needs does the population have related to DE&I and where are they engaged to fulfill those needs?

### ACTIONS

What actions does the population expect from companies and how does that impact their brand value?

# RESEARCH METHOD:

Research was conducted via an online survey from September 16 to September 27, 2022. The sample was weighted to be representative of the population of each market, by gender, age, geography and income.

| Market | Sample |
|---|---|
| Australia: | 500 |
| China: | 508 |
| Hong Kong S.A.R.: | 527 |
| India: | 538 |
| Indonesia: | 508 |
| Japan: | 502 |
| Korea: | 505 |
| Philippines: | 501 |
| Singapore: | 501 |
| Thailand: | 518 |

## APAC total: 5,108

# FAMILIARITY:

## Widespread Knowledge of DE&I Exists

Overall, the majority of respondents in the study were at least somewhat familiar with the concept of DE&I. While those that were very familiar was smaller, 22%, there was **not a single respondent** who had never heard of the concept.

Looking at the data, two additional trends emerged, shaping how we understand familiarity: sources of information on DE&I largely occur on social media, and there is a demand for more educational materials from organizations.

# 71%

**are very or somewhat familiar with the concept of DE&I**

## Social Media at the Forefront

People consistently read, see or hear about DE&I topics through different media channels (66%+). Across nearly all markets, social media was the dominant channel for information (Japan and Korea favored broadcast). 78% of people across the region also felt most comfortable talking about their own background with people they know, showcasing how one-to-one and small group conversations are the most likely to drive familiarity.

## Showcasing Progress

Across the region, people also believe that their countries are taking steps to be more diverse (72%), equitable (68%) and inclusive (68%). However, our respondents believe that companies should take more actions to promote DE&I, for example, through education (39%).

# VIEW FROM THE MARKET

Working with clients in healthcare, technology, consumer goods, travel and beyond, we've seen a need for more conversations on DE&I that are APAC-oriented. From creating guides to using inclusive language in cross-region communications (including emojis) to advising executives on social media strategy, DE&I is not a standalone anymore and needs to filter through all parts of communications.

DE&I statements should reflect the purpose of an organization. It is the guiding principle for the business to aspire, as well as the commitments to employees, customers and society. It requires strategies and, most importantly, measurable goals to assess internal and external perceptions of the actions. Favorable public perceptions increase when an organization drives positive changes. It also leads to higher employee engagement scores and better retention.

**Kitty Lee,**
Deputy General Manager,
Hong Kong S.A.R.

# PERCEPTIONS:

## Despite Familiarity, Perceptions and Needs Vary by Each Market

We start to see differences between markets when we move beyond the overall concept of DE&I and start to define the concept and associated attributes. Not only does each market prioritize different attributes more highly, but when we compare the associations with DE&I to the needs that society should solve for, differences also exist.

Across the attributes tested, the research showed that some issues were significantly more in the public consciousness than others. Ethnicity, race, gender and nationality topped the list, with more than 3 in 4 choosing these as a top association with DE&I more generally. Immigration, parental status and military status received lower association (<63%).

For each of the individual markets in APAC, the story was more complicated. Seven different associations topped the list in 10 countries, showing the diversity of opinion on what DE&I means.

Comparing the factors associated with DE&I to the needs the population of APAC thinks society needs to solve, we saw even more opportunity. While some priorities aligned in both areas, some pressing needs outranked what people traditionally thought of as related to DE&I.

## Most Associated Aspect of DE&I:

| Australia | China | Hong Kong S.A.R. | India | Indonesia | Japan | Korea | Philippines | Singapore | Thailand |
|-----------|-------|------------------|-------|-----------|-------|-------|-------------|-----------|----------|
| **82%** | **78%** | **79%** | **88%** | **82%** | **52%** | **78%** | **85%** | **77%** | **82%** |
| GENDER | NATIONALITY | ETHNICITY | CLASS | RELIGION | RACE | CULTURE | GENDER | ETHNICITY | ECONOMIC |

## Association With DE&I

*How much do you associate each of the following terms with DE&I?*

Ethnicity
Race
Gender
National Origin/Country of Origin
Cultural Background
Social Status/Class
Religious/Spiritual Belief
Sexual Orientation
Economic Status
Employment Status
Disability Status
Age
Income
Marital/Family Status
Immigration Status
Parental Status
Military/Veteran Status

0%   20%   40%   60%   80%   100%

🟥 Strong association   🟨 Moderate association
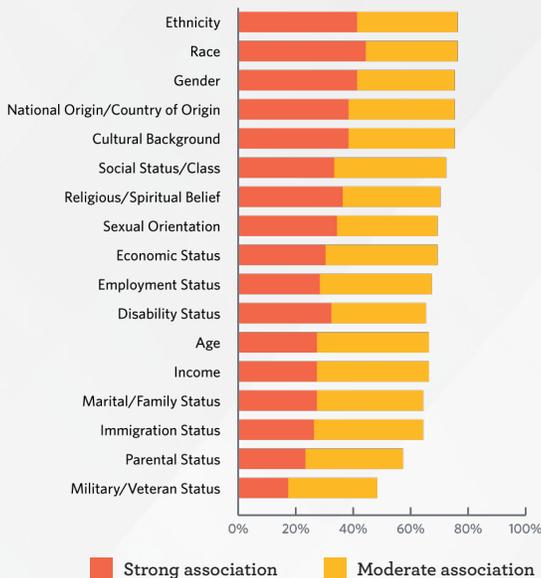
## Need Society To Solve

*Please select the top 3 aspects of DE&I which you believe are the most important for society to address.*

Racism or casteism in general
Discrimination in general
Sexual assault and harassment against females
Education inequities
Gender-based discrimination
Freedom of belief / religion / political affiliation
Discrimination against people with disabilities
Inequality in our criminal justice system
Health inequities
Gender pay gap
Ethnicity in general
Discrimination against the LGBTQ+ community
Housing inequities
Discrimination against older people
Immigrants / refugees equities
Parental employment benefits
Sexual assault and harassment against males
Discrimination against younger people

0%   10%   20%   30%   40%   50%

# NEEDS:

## APAC Sees High Levels of Advocacy, But More Action Is Required

Across issues, the population in Asia is active in its advocacy, with 84% of people noting that they advocate for at least one issue. Economic issues take the top three rankings where people are active in advocacy, outpacing the topics they most associate with DE&I.

*"We were intrigued to see such high levels of advocacy on economic issues, but reflecting on it, this didn't come as a surprise. Given the wide range of incomes, professions and social standing represented in our responses, these issues are the topics that are most tangible for people to push for change on a daily basis,"* said Munavar Attari, Managing Director, Mumbai, India.

Roughly a third of the population believes that their countries need to take more action on diversity (32%), equity (28%) and inclusion (28%).

Each market has a diverse set of needs, with the topics that need addressing ranging from sexual assault to criminal justice reform. Economic issues are also important here as housing, education and access to healthcare are all cited as large needs in various markets.

Additionally, some markets see more need for change than others. The top issues needing to be addressed were cited by nearly two-thirds of individuals in China, Hong Kong S.A.R., India and Thailand; whereas only a third agreed on the top issues in Australia, Singapore and Japan.

## Economics Are a Driving Factor to Facilitate Change on Multiple Issues

*How active are you in advocating for each of the following in your market?*



Legend: ■ Very active   ■ Somewhat active
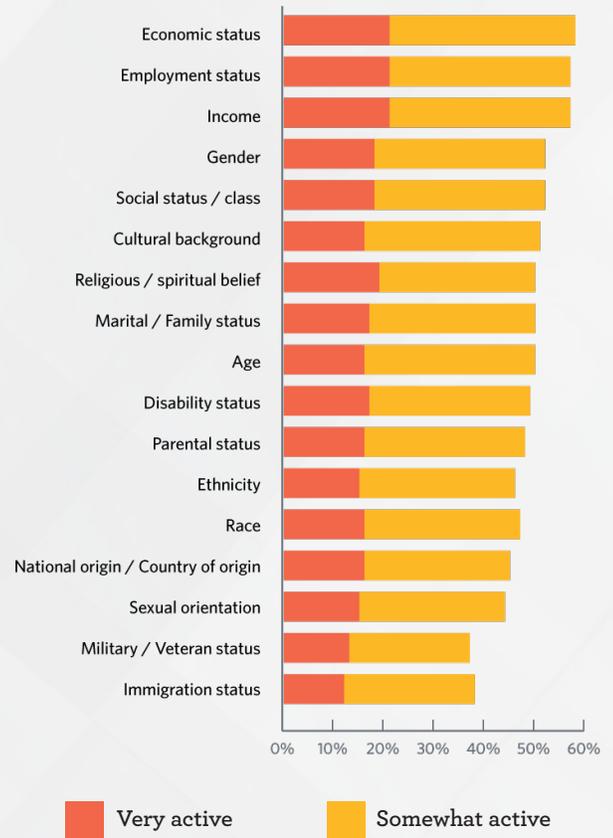
## Where Can Each Market Focus To Drive Progress?

**Percentage of people who think their markets are not very or not at all active in addressing DE&I issues.**

|  | Australia | China | Hong Kong S.A.R. | India | Indonesia | Japan | Korea | Philippines | Singapore | Thailand |
|---|---|---|---|---|---|---|---|---|---|---|
| **Diverse** | 22% | 9% | 39% | 14% | 15% | 58% | 49% | 21% | 27% | 31% |
| **Equitable** | 31% | 11% | 46% | 17% | 20% | 55% | 50% | 23% | 28% | 37% |
| **Inclusive** | 25% | 11% | 44% | 16% | 24% | 60% | 49% | 23% | 27% | 39% |

# ACTIONS:

## People Across APAC Vary Quite Widely in How They Act on DE&I

Understanding action begins with understanding the ways that people define themselves and act across the region. There is a wide range of support for DE&I issues, in many different formats, from allies to observers.

*"We saw each market have a unique distribution of DE&I personas. The majority of people in the region define themselves as bystanders or observers, but we see a significant population of upstanders and allies, especially in markets like China and India. In China, in particular, netizen culture has resulted in a large portion of the population that will stand up when they sense injustice,"* according to Michaela Wang, Deputy General Manager, Shanghai, China.

## ALLY

Allies are active or have a personal commitment to fighting for DE&I causes.

**Top 3 Markets for Allies**

| Australia | India | Thailand |
|-----------|-------|----------|
| **24%** | **24%** | **24%** |

## UPSTANDER

Upstanders speak or act in support of an individual or cause, particularly if it means intervening on behalf of a victim.

**Top 3 Markets for Upstanders**

| China | Thailand | India |
|-------|----------|-------|
| **37%** | **25%** | **22%** |

## BYSTANDER

Bystanders are not directly involved in the topic or issue, but have the choice to intervene, speak up or do something about it.

**Top 3 Markets for Bystanders**

| India | Philippines | Singapore |
|-------|-------------|-----------|
| **34%** | **34%** | **34%** |

## OBSERVER

Observers are people who observe the situation but don't get involved.

**Top 3 Markets for Observers**

| Korea | Hong Kong S.A.R. | Japan |
|-------|------------------|-------|
| **37%** | **35%** | **34%** |

# ACTIONS:

## Expectations for Corporate Actions Are High, With Chief DE&I Officers Playing an Important Role

Companies play an important role in the DE&I landscape. 94% of respondents to the research cited at least one action that companies could take to showcase authentic commitment to DE&I.

Having a clear strategy and goals on DE&I topped the list of prioritized actions, showcasing the need for thoughtful planning on DE&I and alignment on a strategy.

*"In Asia Pacific, the data shows that companies need to organize the way they are communicating their goals for DE&I. Connecting these goals to the values held by the company, and ensuring they are understood by internal as well as external stakeholders is essential,"* said Katie Shaw, Corporate Practice Lead, Singapore.

Education is also important, not only to drive understanding but to also make DE&I topics more accessible. Roughly half of the survey respondents noted that they felt uncomfortable discussing their personal, social or cultural status. When asked where they had felt discomfort, work rose above all other situations.

To truly live their DE&I values, corporations must strive to not only create more knowledge on the topic, but also create a place where issues can be more openly discussed.

## Chief Diversity Officers Needed

# 84%

consider the role of a chief DE&I officer to be important for a company

## Requirements of Chief Diversity, Equity & Inclusion Officer



- Being the internal company representative on DE&I issues
- Being the main external spokesperson on DE&I issues
- Involved in employee hiring, recruitment and talent development
- Shaping DE&I policy for the company
- Engagement with community/groups
- Training for employees
- Mediating issues among employees
- Advocating on behalf of the company
- Involved in financial decisions related to DE&I

## Top Five Authentic Actions From Organizations

| | |
|---|---|
| Have a clear strategy regarding the company's aims and goals regarding diversity, equity and inclusion. | **43%** AGREE |
| Provide training and further education for all staff on unconscious biases and best practice DE&I techniques. | **39%** AGREE |
| Ensure minority voices are heard and acknowledged in the decision-making process. | **35%** AGREE |
| During the recruitment process, ensure the interviewers have diverse backgrounds to help offset biases. | **33%** AGREE |
| Have a mentorship program to encourage DE&I employment and development. | **32%** AGREE |

# IN CONTEXT:
## VIEWS FROM OUR EXPERTS

# CHINA
## Speaking Out on High Expectations

Chinese people should be no strangers to the core idea behind DE&I. In fact, concepts related to DE&I are deeply rooted in Chinese culture and reflected in many ancient maxims. The most famous one perhaps is "seeking harmony in differences," a key pillar in Confucian ideology, and still frequently quoted by the Chinese government today when talking about the market's social and foreign policies. Over thousands of years, while a vast market, China has been home to diverse ethnicities, customs and geographies, yet remained highly homogenous.

Diversity, equity and inclusion is important to China today because its fast economic growth and urbanization leads to unbalanced economic development and resource allocation across the market. There is increasing disparity among people from different regions, ages and cultural backgrounds.

Respondents in China said that the most important aspects of DE&I to address were societal issues, such as education and health inequities, and employment status, economic status and income are the most-discussed and most-advocated topics.

As such, it is clear that the drivers for DE&I in China are quite different from those in the Western headquarters. Localized DE&I messages and strategies are required to navigate the unique ideology and public opinion environment in China.

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In addition, Chinese respondents have high expectations for companies to address DE&I issues in terms of volunteering time, talent and expertise. They believe companies are responsible for presenting actionable solutions and demonstrating the company's values and commitments in the face of crisis.

Therefore, companies operating in China should understand local perspectives and societal contexts that relate to everyone, and make a real paradigm shift rather than just promoting a DE&I policy and generic trainings.

**Michaela Wang,**
Deputy General Manager,
Shanghai

# HONG KONG S.A.R.

## Defining a Unique, Economic-Driven Path

Hong Kong S.A.R. stands out in the Asia Pacific region in many ways. It is the financial center of Asia Pacific, a harmonious mix of cultures and peoples, and dynamically evolving over time to become a dense and bustling metropolis of nearly 7.5 people. Even with its large population and great density, it is a city constantly on the move, so much so that this drive is baked into the culture.

With its population constantly in motion, it also means that people are both pragmatic and flexible to change. While many things surprised us in the data on diversity, equity and inclusion, pragmatism and flexibility came through as defining characteristics of Hong Kong S.A.R. attitudes toward DE&I.

First and foremost, the diverse influences in Hong Kong S.A.R. shone through. Associations of ethnicity and race were the highest in the market, showcasing the lives that people live every day in this truly global city. Similarly, when asked about what would improve society, these same two topics ranked above all else.

Second, the intense pressures of day-to-day life also arose. With still-rising inequality in the market, we also saw areas where people expect a change in the data, with equitable housing chief among them. In addition, the pressure for improved education was also a highlight.

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While these data points reflect the demographics of Hong Kong S.A.R. lives that people live in the market, we also saw the culture of pragmatic views that we are known for come through in the data. When asked to select between opposing options of the attributes that define their city, the majority of respondents selected "a mix of both" between progress and the traditional, and between the good of the whole and the good of the individual.

Pragmatism was especially visible when it came to advocacy.

When asked about the issues that they advocate for most regularly, nearly half of the respondents (48%) chose "economic status." On top of this, people ranked "economic status" as the area of DE&I that the market should prioritize most highly. Finally, income tied with gender as the DE&I topic that people hear about most regularly.

Given the frequency that people hear about economic issues, and the depth of the focus on economic issues in driving for change, we can see that the people of Hong Kong S.A.R. seek to care for their day-to-day living needs, given the multitude of demands on their times and intensity of the definitions of success.

# HONG KONG S.A.R.

Despite these demands, we also saw that people in Hong Kong S.A.R. are quite flexible when dealing with the entire population's demands versus the needs of individuals. When asked to select which they agreed with most, 53% of people noted that they agree with a mix of "accommodating minority groups" and "focusing on majority groups."

This was not the only place where this flexibility showed through. When asking about what companies can do on DE&I to increase favorability, we saw people gravitate toward pragmatism (fair pricing and quality products/services) and civic-minded actions (hiring fairly and treating employees well). The expectations of a good value, but with the right actions driving it, showcase one of the other ways that people here seek balance.

As Hong Kong S.A.R. continues to evolve, the data shows that companies can come together with public institutions, and working in the interest of the public, put forward solutions that make society more accessible for all.

**Kitty Lee,**
Deputy General Manager,
Hong Kong S.A.R.

# INDIA

## Evolving Expectations and Needs From Multiple Stakeholders

When interpreting survey data from India for our clients, we always counsel that they should consider the macrocosms and the microcosms. While many things may be true for a representative population of the market's demographics, there are also communities millions strong for which the data may be completely different. It is only by looking at the whole and at the parts that we can get closest to the truth.

With the DE&I Decoded data, this is abundantly clear. Many of the questions received near unanimous agreement from Indians. Nine in 10 are familiar with DE&I at some level, 88% associate status and class with DE&I, nearly half read about DE&I issues on a monthly basis on social media, and 1 in 4 consider themselves allies to DE&I issues (the highest of any market). These consistencies show that DE&I issues are front and center in the lives of the average Indian.

However, a deeper look at the data shows the different needs of multiple communities. For example, we see quite a spread in the data surrounding the issues that society needs to address related to DE&I. Rather than focusing on discrimination in general, which many markets sought to address, in India, topics of freedom of religion/political beliefs, education inequalities, sexual assault and harassment, and health inequalities also came to the top.

**With multiple communities facing different day-to-day realities based on income, caste, religion and other aspects of life, it's unsurprising that we see such variety of topics that are important to address.**

With multiple communities facing different day-to-day realities based on income, caste, religion and other aspects of life, it's unsurprising that we see such a variety of topics that are important to address.

For companies working with their employees, or communicating to broader stakeholders, considerations have to take into account not only the general trends for the market as a whole, but also the specifics of the makeup of the audience they're working with, in particular. While this presents them with quite a nuanced task, companies that execute it well can not only avoid the risk of offending one of many audiences, but can also speak with local knowledge that makes their messages more relevant and meaningful.

# INDIA

Successful communications can also have a real impact. More than 8 in 10 Indians believe their market is actively taking steps to be more diverse, equitable and inclusive. While there are still areas where progress needs to be made (Indians cite casteism and freedom of religion), there is optimism about society reflecting on issues that it needs to solve, and multiple stakeholder groups addressing the challenges.

According to an analysis by the UN, policies in India lifted more than 415 million people out of poverty between 2005 and 2021. Given the optimism in the market around addressing DE&I issues (less than 20% believe the market is not active), this will likely be a new frontier in policy and corporate action to address social progress.

**Munavar Attari,**
**Managing Director,**
**Mumbai**

# KOREA
## From Consciousness to Engagement

Korean society has emphasized unity and recognized its status as a "single nation," both historically and culturally for a long period. The traditions and experiences that the market has shared, have also empowered the success of the market. However, this means that the discussion of differences in Korea can be somewhat muted, despite these differences in economic prosperity, gender, religion, disability status and more being very real in society.

We see this muted discussion with the very first question the research sought to answer. When asked, "How familiar are you with the concept of DE&I?" only 13% of Koreans responded with "Very familiar." However, 66% selected that they were "Somewhat familiar" with DE&I, while the net familiarity (somewhat and very familiar) was on par with the APAC averages, Koreans were less likely to be comfortable with a deep knowledge of the concept of DE&I.

**Consciousness of DE&I has grown over within Korea, and Korean companies as well as Korean society at large is ready for more active engagement.**

Consciousness of DE&I has grown within Korea, and Korean companies as well as Korean society at large are ready for more active engagement.

Regarding DE&I issues, Korea believes that "Racism in general" (41%) is the most important factor that needs to be addressed by society, like what was identified by the other countries in APAC. This is followed by "Discrimination against People with Disability (PWD)" (28%), "Discrimination against LGBTQ+ community" (25%), and "Sexual assault and harassment against females" (25%). Moreover, respondents believe that the DE&I areas that the market needs to prioritize are PWD status (40%), social/income status (39%), and race (38%).

Given the multitude of topics that Koreans associate with DE&I, we can already see that, while many may not be confident in their knowledge of DE&I, they are well versed in understanding the different concepts that may be a part of its definition. Similar to the associations, the areas needing to be addressed highlight a drive for change in multiple areas, with equal importance given to change that makes society more diverse, inclusive and equitable.

More than half of the respondents that replied to the survey want Korea to be able to accommodate minority groups (55%) and provide people with different backgrounds fair and equal access to personal and professional development (61%). Alignment to these statements also points to change, as Koreans are prioritizing creating a society where people can have access to the mechanics of society, including the economy and education.

# KOREA

Showcasing the variety of areas that are top of mind for the population will be important to create the dialogue that drives change. While Koreans are comfortable talking about DE&I identity with people they know (69%), only about a quarter (24%) are comfortable talking about the same topic with new people. And 45% of those who felt uncomfortable discussing DE&I cited the workplace as the location of their discomfort.

When companies successfully implement global DE&I initiatives in Korea, it is important to start with shared values and then engage deeper progressively. More comfortable topics and issues of interest can serve as a catalyst to later delve into additional topics; however, it is important to localize the application of DE&I principles and ensure that the unique historical and societal standards in each local cultural context is considered.

**Sam Kim,**
DE&I Lead,
Korea

# JAPAN
## Finding Harmony

Wa **(和)** can loosely be translated into English as "harmony" and relates to the idea that each person is responsible for the harmony of the group. It is the fundamental belief and fabric that keeps and allows the Japanese society to function the way it is admired for when one travels to Japan, especially as a tourist. It keeps things in order — people following the status quo rather obediently and one of the key reasons for a safe and stable life in Japan — if one fits in and plays by the rules set out by society.

It is this concept that often stands in between Japanese society and any major change or shift in "how things are done." Stagnant for generations and decades, already trailing behind in transformation toward digital processes, which many countries have embraced and managed to proceed with since the beginning of the internet. Japan just recently managed to update the process of physically stamping papers for approval out of the government and business processes — and the only reason might be that COVID did not permit for many institutions over time to keep the manual process in place due to health safety concerns.

With this fundamental system, developed over centuries, it is no surprise that public opinion in Japan is often sitting somewhere between cautious optimism and long-term outlook, rather than a quick and immediate call for change or to act. This is often reflected in a "middle way" response on surveys that talk about bigger societal changes or big jumps from the status quo in general. Swaying too far off from the middle ground is seen as too individualistic and possibly a threat to the established, balanced harmony within the group dynamics.

DE&I might be an especially complex topic that it has survey participants likely to ask themselves which route Japan would possibly go while maintaining harmony, rather than what should be the right thing to lead toward. This does not mean there is no DE&I in Japan, it just takes a different form.

A commonly known fact: Japan ranks among the highest in gender gap inequality, and has for decades not improved on this on a significant scale. Women are generally well-educated, hardworking individuals, but still struggle to be seen as equals in this society and are not often seen to be openly advocating or fighting for it — to likely not upset harmony.

# JAPAN

Besides that, the survey shows clearly that the most associated aspect of DE&I is about race for the Japanese responders. In a homogenous and aging society like Japan, it is becoming more and more important to be aware and ready to accept that the only way to keep the society from eventually collapsing into a financial liability in terms of the shrinking labor force and to sustain the retirement funds, is and will be immigration.

One might understand that immigration will require a big mindset change beyond just sustaining harmony, as people who will immigrate from abroad do not necessarily possess the learnings and behavioral attitude that is coined as necessary in Japan to keep harmony on all fronts and levels.

Japan has always been a very diverse market, though in terms of accepting religions and people from all backgrounds. It has its own DE&I values — it just tries to safeguard its integral culture to uphold harmony and not end up losing control of this way of life at the same time.

It will take time and balanced steps on both sides, the Japanese wish for harmony, and the outside world's push for change, to get this right. There is no "one size fits all" definition for DE&I that is universally applicable and can be followed immediately by a system that is a unique and working act of balance.

The Japanese public knows that DE&I and its elements will play a key role at some point later in time when things are in place and they can put a finger to it — but everything needs to be done one step at a time, without disrupting what makes Japan special — you guessed it: Harmony.

> **Japan has always been a very diverse market, though, in terms of accepting religions and people from all backgrounds. It has its own DE&I value — it just tries to safeguard its integral culture to uphold harmony and not end up losing control of this way of life at the same time.**

**Takeo Apitzsch,**
Head of APAC Media +
Platforms, Tokyo

# SINGAPORE

## Collaborating to Drive Change

Embracing cultural and religious diversity is a proud part of Singapore's heritage and societal values, but when it comes to broader aspects of DE&I — like gender, economic status, disability and social class — this new report reveals that there is still a lot of work to be done to foster greater understanding and drive change.

Interestingly, one of the key questions raised by the research for Singapore is where this change should come from, with the study pointing to a current gap in DE&I leadership. The majority of Singaporean respondents, in line with the APAC average, see themselves as "bystanders" (34%) or "observers" (32%) when it comes to issues around DE&I, with only 10% of Singaporean respondents considering themselves to be "allies" on these issues.

Despite this, there is a clear appetite in Singapore for leadership and change, and a lot of Singaporeans are looking for companies and employers to take charge. Three-quarters of Singaporeans (75%) see it as important that a company has a dedicated DE&I leader, team or officer, and the majority expect that this team or officer should shape policy for the company and employees.

However, the report points to a gap between expectation and reality when it comes to employers — nearly half (46%) of Singaporeans are looking to their employers to provide training, but in reality very few hear from their employers on the topics that matter, such as issues of race (4%), economic status (5%), disability (2%) and gender (2%).

This underscores an urgent need for Singaporean companies to step up their leadership and employee engagement around DE&I, not least because the research also reveals that companies that actively invest in DE&I enjoy a better external reputation as well, with 70% of Singaporeans believing that having a dedicated DE&I officer increases a company's trustworthiness.

**There is a clear appetite in Singapore for leadership and change, and a lot of Singaporeans are looking for companies and employers to take charge. Three-quarters of Singaporeans (75%) see it as important that a company has a dedicated DE&I leader, team or officer, and the majority expect that this team or officer should shape policy for the company and employees.**

In a similar vein, the research highlights that the way a brand treats its employees now carries huge weight in the court of public opinion, with fairness toward employees (51%) and workforce diversity (37%) reasons APAC consumers tend to think more favorably about brands overall.

# SINGAPORE

Companies shouldn't just focus their DE&I efforts internally, though. The research also finds across APAC that consumers are equally discerning about seeing inclusivity in a brand's marketing, advertising and communication too, with 28% of APAC consumers saying that inclusive marketing would make them think more positively about a brand, and 1 in 4 (25%) saying the same about advertising that shows elements of different cultures.

Scrutiny of brands' values is something that we only expect to increase in the future and will have a direct impact not only on a company's ability to hire, but its sales as well, so there is a real and urgent need for Singaporean employers to bridge the DE&I communications gap with their employees, and to ensure that they prioritize inclusivity in all aspects of their communications and external touchpoints as well.

**Katie Shaw,**
**Corporate Practice Lead,**
**Omnicom PR Group,**
**Singapore**

# IN CONTEXT:
## MARKET SNAPSHOT

# CHINA:
## Key Metrics

**80%** Familiar with DE&I

**37%** Being an **UPSTANDER** when facing DE&I issues

### Comfortable Talking About Social and Cultural Background

**86%** with people they know

**69%** with new people

China is highly engaged with DE&I and shows the most familiarity with the topic of any market. Beyond familiarity, China is also open to talking about DE&I, and has high levels of advocacy and action, as represented by people largely associating with the upstanders definition.

## Top Associations

- **78%** National origin/market of origin
- **77%** Social status/class
- **76%** Cultural background
- **76%** Race

## Top Areas to Address

- **35%** Education inequalities
- **28%** Racism and casteism in general
- **25%** Sexual assault and harassment against females
- **25%** Health inequities

# HONG KONG S.A.R.:
## Key Metrics

**61%** Familiar with DE&I

**35%** Being an **OBSERVER** when facing DE&I issues

### Comfortable Talking About Social and Cultural Background

**76%** with people they know

**51%** with new people

As a financial hub, Hong Kong S.A.R. focuses on economic issues in its activism on DE&I, but still seeks solutions from society, governments and corporations on discrimination in many forms. Ethnicity and race also factor heavily into associations, as well as the areas that society needs to address, showcasing the market's focus on accommodating a diverse population and status as an expat hub.

## Top Associations

- **79%** Ethnicity
- **79%** Race
- **75%** Sexual orientation
- **74%** Gender

## Top Areas to Address

- **29%** Discrimination in general
- **29%** Racism and casteism in general
- **27%** Gender-based discrimination
- **23%** Inequality in our criminal justice system

# INDIA:
## Key Metrics

**89%** Familiar with DE&I

**34%** Being a **BYSTANDER** when facing DE&I issues

### Comfortable Talking About Social and Cultural Background

**90%** with people they know

**76%** with new people
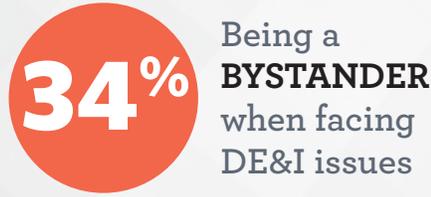
India has among the highest familiarity with DE&I of any market surveyed, with the majority of the population being comfortable with discussing DE&I with both people they know as well as new people. The market also has diverse opinions on what DE&I issues need to be addressed, ranging from education to harassment, to religion.

## Top Associations

**88%** Social status/class

**87%** National origin/ market of origin

**87%** Economic status

## Top Areas to Address

**30%** Education inequalities

**30%** Sexual assault and harassment against females

**27%** Freedom of belief/ religion/political affiliation

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# INDONESIA:
## Key Metrics

**76%** Familiar with DE&I

**33%** Being a **BYSTANDER** when facing DE&I issues

### Comfortable Talking About Social and Cultural Background

**88%** with people they know

**52%** with new people
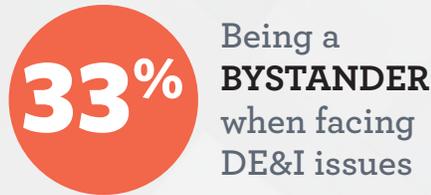
Indonesia's diverse religious population comes through front and center in the data. It is one of the few markets where the top association with DE&I is aligned with the areas that society must address. The market is also focused on social status and casteism, with these variables pulling through in the top associations, and areas for society to address as well. Given the exponential growth of the population and economic power, understanding the nuances of the population, and their opinions these on topics will be essential.

## Top Associations

**87%** Religious/spiritual belief

**86%** Race

**84%** Sexual orientation

**84%** Gender

## Top Areas to Address

**38%** Discrimination in general

**38%** Racism and casteism in general

**34%** Gender-based discrimination

## JAPAN: Key Metrics

**30%** Familiar with DE&I

**34%** Being an **OBSERVER** when facing DE&I issues

### Comfortable Talking About Social and Cultural Background

**38%** with people they know

**22%** with new people
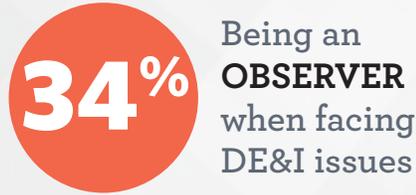
Japan has strong alignment with other markets on the areas associated with DE&I, even with the population noting they are less familiar with the topic than in other markets. Similarly, Japan expects activity to address racism, discrimination and gender equality, many of which arise as the top trends to address for the full region. As Japan continues to observe DE&I issues, these areas will continue to be central to resonant messaging with the population.

### Top Associations

**52%** Race
**51%** Cultural background
**50%** Gender

### Top Areas to Address

**36%** Racism and casteism in general
**33%** Discrimination in general
**33%** Gender pay gap
**28%** Education inequities

## KOREA: Key Metrics

**78%** Familiar with DE&I

**37%** Being an **OBSERVER** when facing DE&I issues

### Comfortable Talking About Social and Cultural Background

**69%** with people they know

**24%** with new people

In Korea, gender-based discrimination tops the gender pay gap in issues to address, one of the few markets where this occurred. With a rapidly evolving economy, a powerhouse cultural export industry, and slowing population growth, understanding the gender dynamics of the market will be key to creating strategies in the marketplace that resonate with the society.

### Top Associations

**78%** Cultural background
**77%** Ethnicity
**74%** Race

### Top Areas to Address

**41%** Racism and casteism in general
**28%** Discrimination against people with disabilities
**25%** Gender-based discrimination
**25%** Inequality in our criminal justice system

# SINGAPORE:
## Key Metrics

**67%** Familiar with DE&I

**34%** Being a **BYSTANDER** when facing DE&I issues

## Comfortable Talking About Social and Cultural Background

**78%** with people they know

**50%** with new people

Singapore has both a comfort with DE&I as well as a more conservative nature when it comes to talking about or acting on DE&I topics. This duality also means that the areas people expect society to address span a broad swatch of society, such as racism and discrimination, in general.

### Top Associations

**77%** Ethnicity

**77%** Race

**76%** National origin/market of origin

**74%** Gender

### Top Areas to Address

**36%** Racism and casteism in general

**32%** Discrimination in general

**23%** Discrimination against people with disabilities

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# AUSTRALIA:
## Key Metrics

**75%** Familiar with DE&I

**32%** Being a **BYSTANDER** when facing DE&I issues

## Comfortable Talking About Social and Cultural Background

**83%** with people they know

**63%** with new people

Australia has both a high familiarity and high comfort in speaking about DE&I. Among all markets, it is one of only two to select gender as the most associated topic related to DE&I. It also ranks sexual assault and harassment against women as an area to address. This scrutiny on gender highlights the opportunities in the marketplace to make progress, especially among an aware and vocal populace.

### Top Associations

**82%** Gender

**82%** Ethnicity

**81%** Cultural Background

**79%** Race

### Top Areas to Address

**36%** Discrimination in general

**30%** Racism and casteism in general

**25%** Discrimination against people with disabilities

**25%** Sexual assault and harassment against females

# PHILIPPINES:
## Key Metrics

**68%** Familiar with DE&I

**34%** Being a **BYSTANDER** when facing DE&I issues

### Comfortable Talking About Social and Cultural Background

**90%** with people they know

**52%** with new people
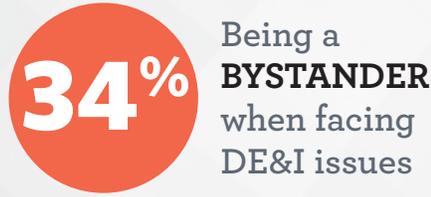
As highlighted in the 2022 presidential elections, gender is an important topics to the majority of Filipinos. Similarly, as seen in the election, social media is evolving to be the go-to discussion forum for all DE&I issues, evident in the comfort that exists in talking about personal, social and cultural identities.

## Top Associations

- **85%** Gender
- **85%** National origin/ market of origin
- **84%** Social status/origin
- **83%** Ethnicity
- **83%** Age
- **83%** Cultural background

## Top Areas to Address

- **35%** Discrimination in general
- **35%** Inequality in our criminal justice system
- **27%** Education inequities
- **23%** Housing inequities
- **23%** Racism and casteism in general

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# THAILAND:
## Key Metrics

**76%** Familiar with DE&I

**25%** Being an **UPSTANDER** when facing DE&I issues

### Comfortable Talking About Social and Cultural Background

**81%** with people they know

**49%** with new people

Like China, Thailand has a large percentage of upstanders, and a high familiarity with DE&I. Many different areas rank highly for the definition of DE&I, but it is one of the few markets where education inequalities outpace all other topics for areas to address.

## Top Associations

- **82%** Gender
- **82%** Ethnicity
- **81%** Cultural background
- **79%** Race

## Top Areas to Address

- **32%** Education inequalities
- **31%** Inequality in our criminal justice system
- **28%** Racism and casteism in general

# WHAT'S NEXT?

## THE EXPECTED, UNEXPECTED AND THE WAY FORWARD

# TAKEAWAYS:

As with any research, studying DE&I in APAC both confirmed things we knew but didn't have data to support, while also teaching us new things that were unexpected. By leaning into those areas of validation, while also adapting to the components of the landscape that are new, we have the opportunity to build upon current progress, and also chart the course for the future of communications and engagement across the region.

## VALIDATING ASSUMPTIONS

**1**

DE&I is important to stakeholders in Asia Pacific, and should be a central consideration in all communications and business strategies.

**2**

Definitions of DE&I contain many expected topics, including race, ethnicity and gender.

**3**

In each market, we see expectations of companies and government varying based on local priorities.

## REFLECTING ON THE UNEXPECTED

**1**

The initial definition of DE&I doesn't reflect the way that people experience topics related to their daily lives, showcasing the disconnect between the way DE&I is communicated and stakeholders, real-life needs.

**2**

There is both alignment and diversion on the areas that people want change in their countries, often dictated by economic, political and cultural issues.

**3**

Organizations taking decisive action on DE&I are being prioritized over those without commitments or plans today.

# TAKEAWAYS:

## How Organizations Need To Adapt

Given the APAC population's priority for goal setting, planning and action, the time for organizations to act is now. Whether it is modifying existing regional plans, localizing global plans to be more relevant to the market, or simply starting the journey, the benefits of approaching DE&I not just from a Western point of view, but a more inclusive view that includes the world's largest region are exponential.

The are four key areas where the research indicates organizations can take action to drive progress and better engage their stakeholders.

### HAVE A CLEARLY DEFINED STRATEGY WITH ACTIONS AND GOALS

Meaningful action starts with a plan, and in APAC, it's particularly relevant to have a plan with actionable goals. These can be modest to start, but require commitment, communication and transparency.

### PRIORITIZE DIALOGUE AND EDUCATION OVER ONE-WAY COMMUNICATION

In fielding this research, we heard that some people in APAC feel they are being talked at, making them disengage. In the survey, we also saw that there is a demand for more conversation, more training and more education.

### CREATE AN EMPLOYERS GUIDE TO DE&I IN THE WORKPLACE

When asked about where they get their information about DE&I, only 3% of survey respondents noted their employers. In contrast, 9 in 10 people expect companies to take action and communicate on DE&I. This is a gap that requires immediate action to keep up with the needs of the population.

### TAILOR COMMUNICATIONS TO ENSURE RESONANCE AND ENGAGEMENT

The language used to discuss DE&I varies so much by market, that it's no surprise that any successful plan needs to be rolled out with the audience in mind. One step beyond this, organizations also need to ensure that the emphasis of DE&I plans is tailored for each market and speak to the elements of their global DE&I that resonate in that market.

# TAKEAWAYS:

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