



The Global DEI Census

2023 Interim Findings



In partnership with:

VOCCOM campaign KANTAR

LIONS effie IAA GWI.



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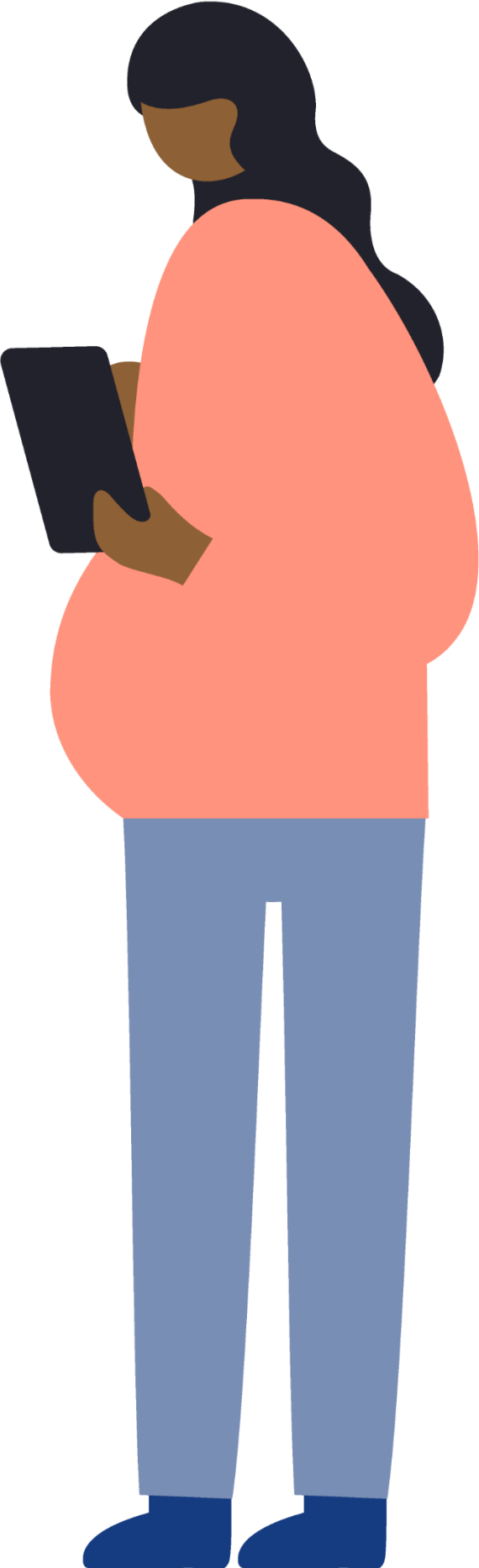
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Acknowledgements

In total, WFA counted on the support of more than 160 associations operating at global, regional and local level. That makes this effort the single biggest collaboration in the history of the global marketing industry.

The output is in-depth insight into the lived experiences of nearly 13,000 people across our industry, insights that will enable us to drive change.

To all those who partnered with us and to all those who responded to the survey, we are incredibly humbled and grateful.



Executive summary

This report provides detailed insight into the state of inclusion and diversity in the global marketing industry. It covers all protected characteristics – race, national or ethnic origin, colour, religion, age, gender, sexual orientation, gender identity or expression, family status or disability – as well as positions, salary and most importantly, lived experiences in the workplace. Here are our main findings:

- 1 in 7 still say they would leave our industry on account of a lack of diversity and inclusion. This rises to 1 in 6 for women and LGBTQ+, 1 in 5 for ethnic minorities and 1 in 4 for disabled respondents.
- 72% of respondents recognise efforts are being made. But this figure varies across countries. 87% recognised efforts in US and Canada. Just 49% in Japan.
- 1 in 2 respondents say things have improved. But the level of positive sentiment depends on where you work. 7 in 10 agree in Spain and Brazil, just 3 in 10 agree in Sweden, Poland and Japan. People in senior positions were more likely to say things have improved (58%) compared with managers (49%) and junior staff (42%).
- Critically we haven't moved the needle on inclusion, according to Kantar's Inclusion Index. In 2021, Kantar's inclusion score was 64%; now it is 63%.
- Women, LGBTQ+, ethnic minority and disabled respondents still have worse experiences than their counterparts.
- The worst experiences by far are reported by disabled respondents.
- The most common forms of discrimination are still around age, gender and family status.
- Women and ethnic minorities feel underrepresented in senior positions. Men are twice as likely to be in C-suite positions.
- Mental health is a big issue. 42% feel stressed and anxious at work.



1 in 7

say they would consider leaving their company and the industry on the basis of a lack of diversity and inclusion

“

It's glass half empty, half full. We are not hugely surprised to see no measurable change across the global industry in just two years because the challenges are so deep-rooted and systemic. They take time to overcome. But the first step is building awareness of the problem. We may not have moved the needle globally but industry efforts are visible. We need double down and stay the course. In time, our efforts will be rewarded with more diverse, equitable and inclusive workplaces where the best talent will flock.”



Stephan Loerke
WFA CEO

Methodology

2023 survey

Online survey commissioned to Kantar and conducted in March-April 2023

~13k

Nearly 13,000 respondents giving us detailed insight into people's lived experiences from across our industry globally

This is not a census in the strict sense of the word. Given the sensitivity of asking questions about people's identity, such a survey must be anonymous and voluntary

91

Across 91 countries

A broader reach of markets in 2023, making this a truly global census

33

In-depth analysis into 33 very different markets

The survey was available in local languages and in English in Argentina, Brazil, Canada, Finland, Germany, Greece, Hong Kong, SAR, Italy, Ireland, India, Japan, Malaysia, New Zealand, Netherlands, Norway, Pakistan, Philippines, Poland, Portugal, Singapore, Slovenia, South Africa, Spain, Sweden, Switzerland, Turkey, the Gulf Cooperation Council (Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, UAE), and the USA

This survey was conducted in parallel with the UK All In Census, whose results are being reported separately in the UK



Covering representation and people's experiences at their companies



Gender



Age



Race & ethnicity



Sexuality



Disability



Sense of belonging
Experience of negative behaviours
Discrimination

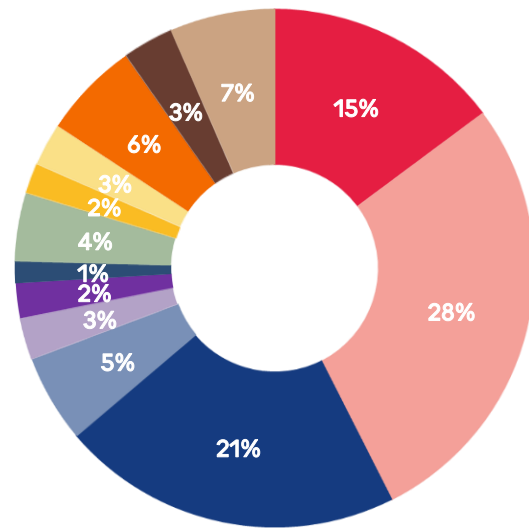


Mental health

Methodology

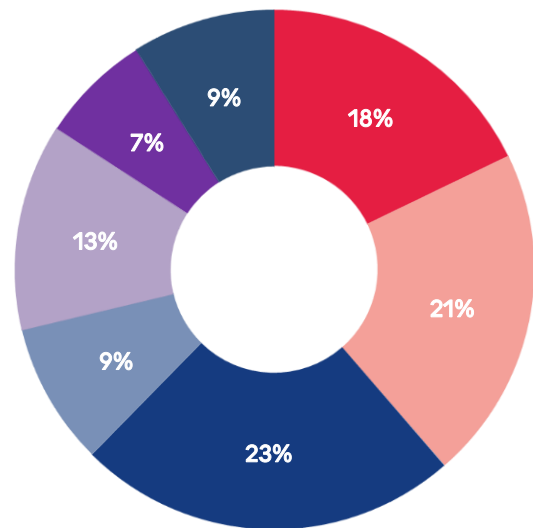
The respondents represent different levels of seniority and include agencies, media owners and advertisers. There was no statistically relevant differences between organisation types for all findings. The survey skews towards women but industry data shows women to be in the majority.*

Organisation type



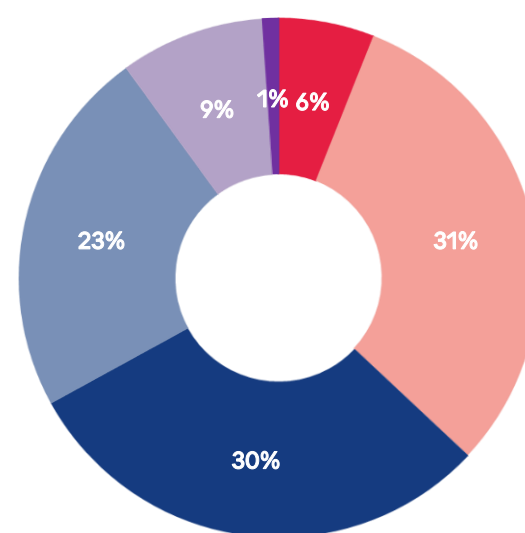
- Brand
- Creative agency
- Media agency
- Media
- Industry association / Trade body
- Production House
- Publisher
- Research/Insights agency
- I am a freelancer
- PR agency
- Digital agency
- Tech
- Other

Seniority



- Executive management/C-suite
- Other senior staff
- Middle manager
- Junior manager
- Executive

Age group



- 18-24
- 25-34
- 35-44
- 45-54
- 55-64
- 65+

Gender

35%
Men**

63%
Women

1%
Non-binary

1%
Transgender

** WPP report 58% female employees, Havas 57%, dentsu 53%
**versus 41% men, 58% women and 1% non-binary in 2021

Sexuality

19%
LGBQ+ respondents in markets where asked
vs 16% in 2021 and 10% in global population

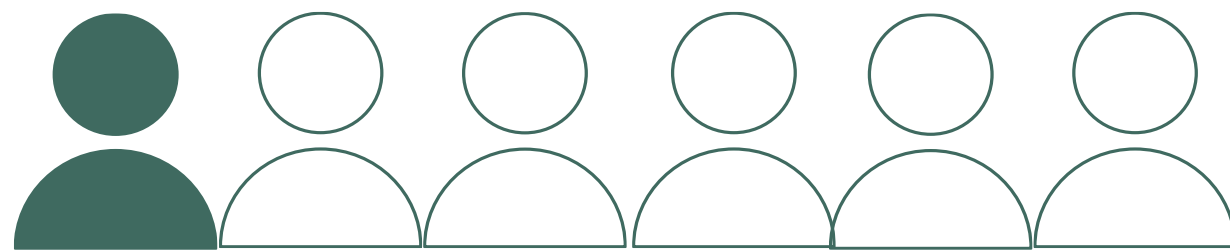
Disability
10%
disabled respondents
vs 7% in 2021 and 15% in global population

The core of this report is based on Kantar's Inclusion Index, a proprietary tool used to address and benchmark I&D performance at both company and industry level. By using the Index, we now have clear insights into the profile of the employees that make up our industry, as well as highlighting key areas for improvement. This in turn equips leaders with a rich dataset helping them to inform action plans that address their most pressing issues and drive sustainable change. Kantar is able to calculate an inclusion score on the basis of asking questions about people's sense of belonging, the absence of discrimination and presence of negative behaviours (see Appendix). This allows Kantar to benchmark every market against our industries global average.

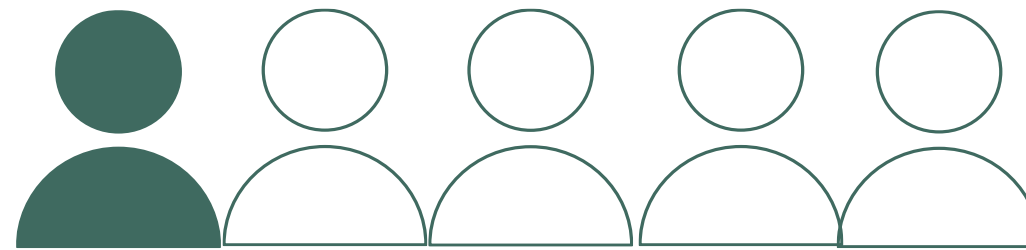
1 in 7 people still say they would leave our industry on the basis of a lack of diversity, equity and inclusion

The overall figure remains the same as that found by the first Global Census on DEI in 2021 despite all the efforts that companies have made to increase diversity, retain talent and improve their appeal to potential employees around the world. The picture is similar at company level, highlighting a lack of company action risks undermining industry DEI initiatives.

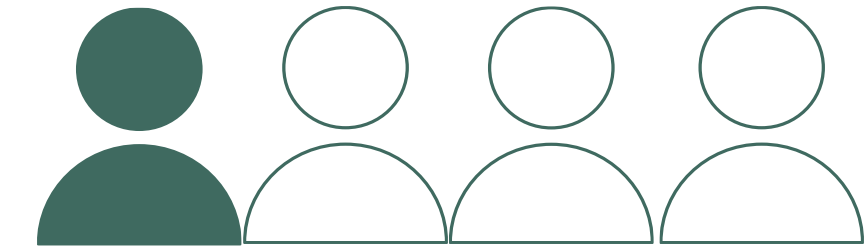
This rises to...



1 in 6 for women and LGBTQ+

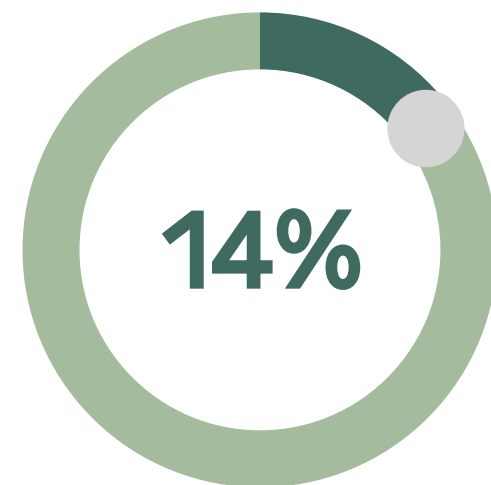


1 in 5 for ethnic minorities

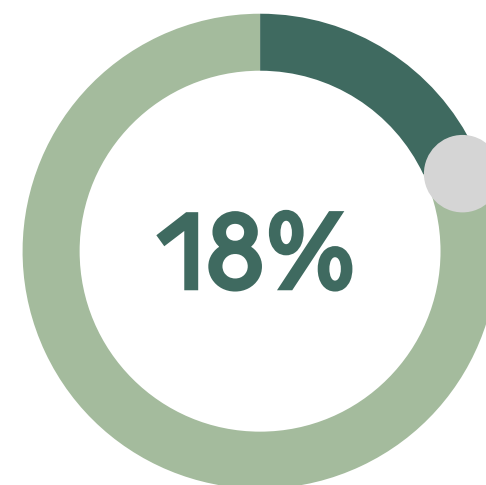


1 in 4 for disabled respondents

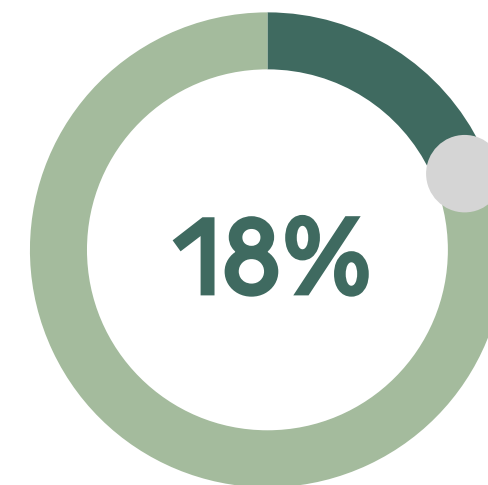
Younger professionals (25-34 years) and caregivers are also slightly more likely to leave than the global average (18% vs 14%).



Global average



Professionals aged 25-34



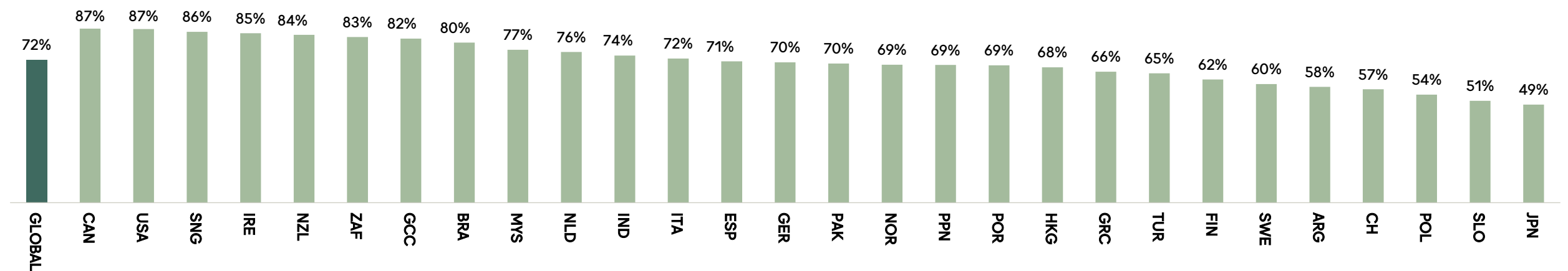
Caregivers

Respondents recognise efforts are being made

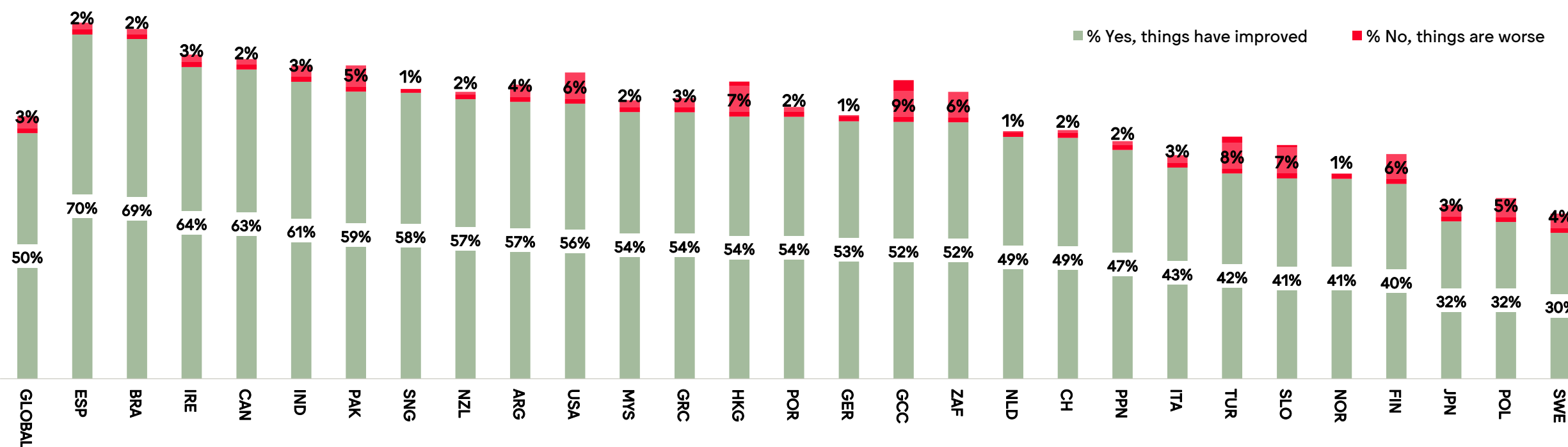
72% said their company is actively taking steps to be more diverse and inclusive. 1 in 2 say things have improved in the past two years but 3 in 10 say said things were the same. However there is a wide variation between countries and between groups within each market.

Do you believe that your company is actively taking steps to be more diverse and inclusive?

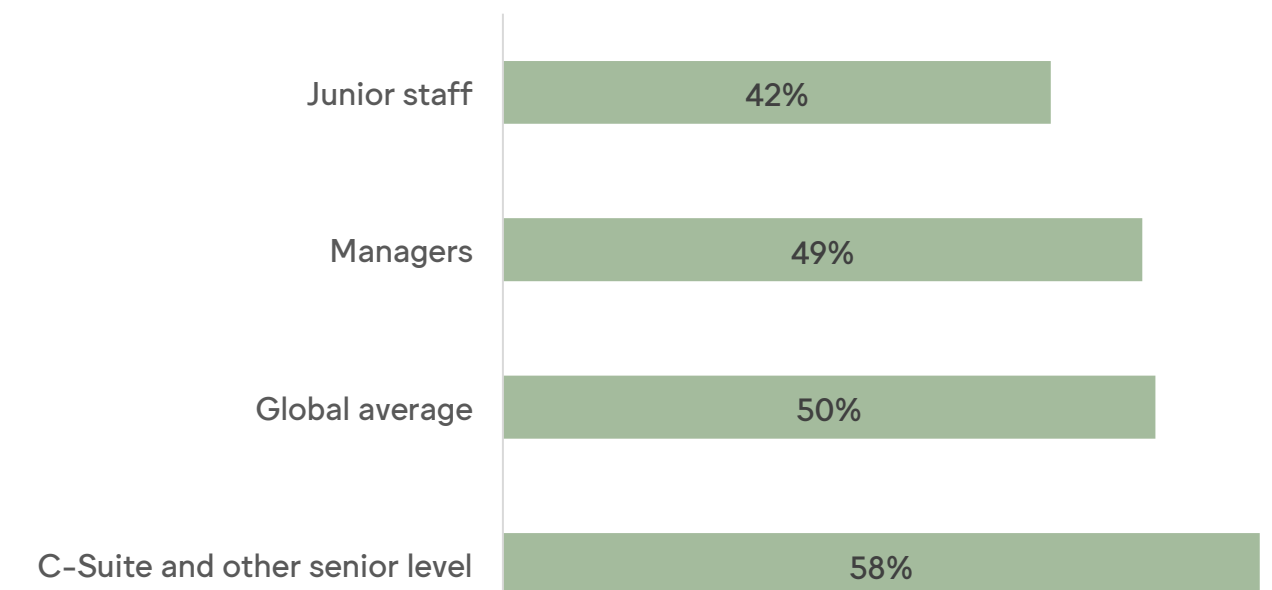
Those who answered 'yes', by market



Over the past two years, do you believe things have improved in terms of the industry being more diverse and inclusive?



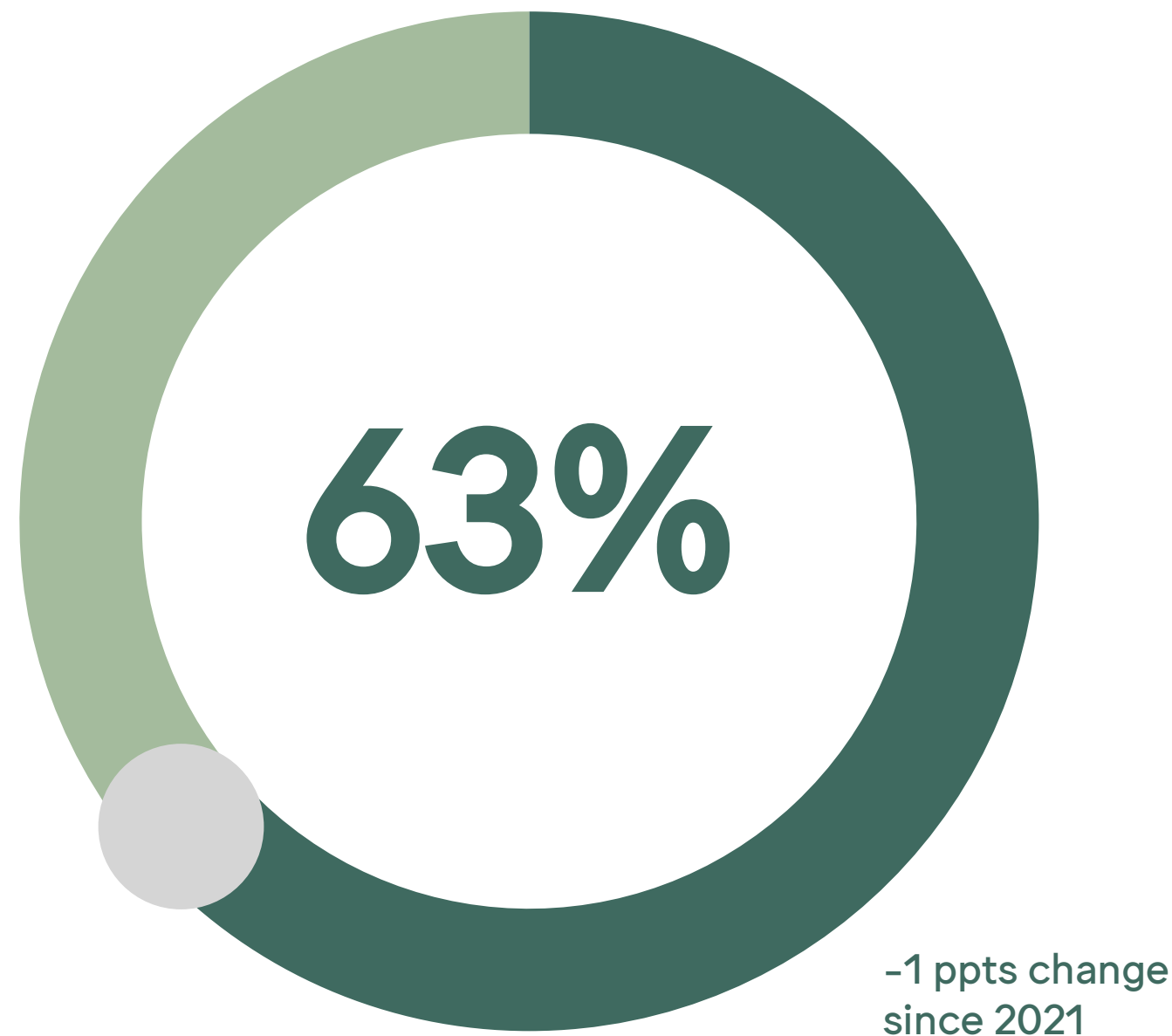
Respondents agreeing that things have improved, by seniority level



Critically, we haven't moved the needle on inclusion

The overall level of inclusion, calculated on the basis of answers to questions about a respondent's sense of well-being, an absence of discrimination and a presence of negative behaviours was almost identical to 2021.

Global DEI Census Inclusion Index Score 2023



69%

Sense of belonging
+1 pts. since 2021

69%

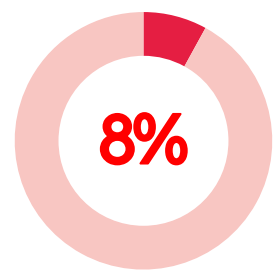
Absence of discrimination
No change since 2021

19%

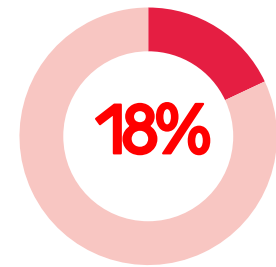
Presence of negative behaviour
+1 pts. since 2021

The most common forms of discrimination reported are still around age, gender and family status

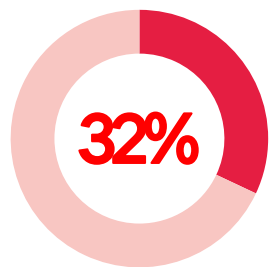
Age



experience discrimination due to their age

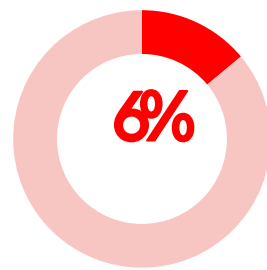


of those aged 55-64 said they personally experienced age discrimination. The same is true of 12% of those aged 18-24

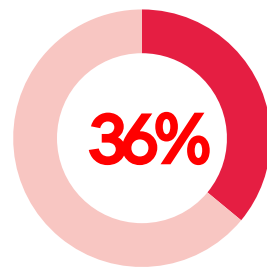


agree age can hinder one's career at their company (versus 12% who says age advantages career)

Gender

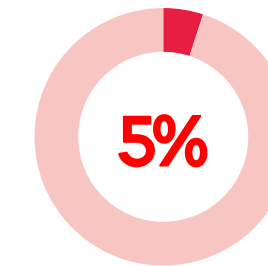


experience discrimination due to gender

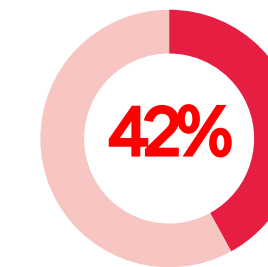


of women who have taken parental leave in the last 5 years say this has disadvantaged their career (compared to 8% of men)

Family responsibilities*



experience discrimination due to their family status

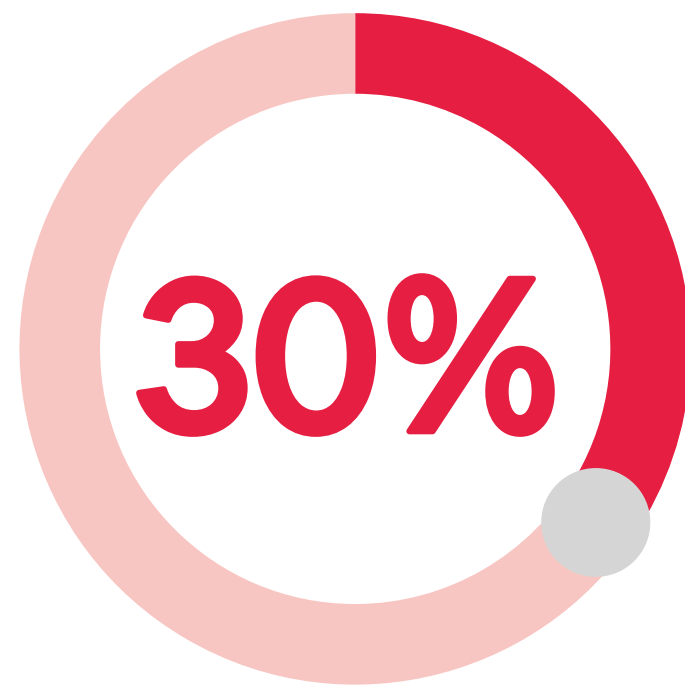


of parents say family responsibilities hinder one's career. The same is true of 41% of women and 39% of caregivers

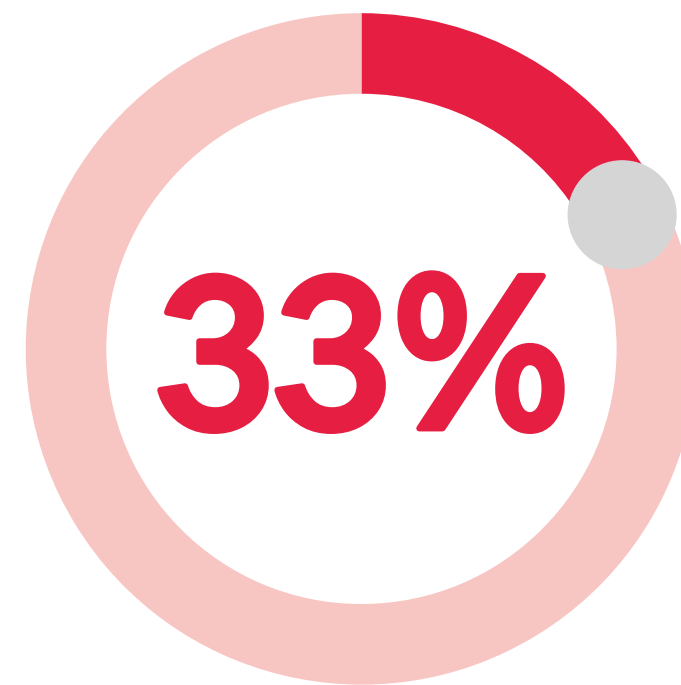
*Family responsibilities includes if respondents have children responsibilities or other caregiver responsibilities, i.e. they look after or give help or support to anyone because they have a long-term physical or mental health condition or illness, or problems related to old age, etc.

Women, LGBTQ+, ethnic minority and disabled respondents still have worse experiences than their counterparts

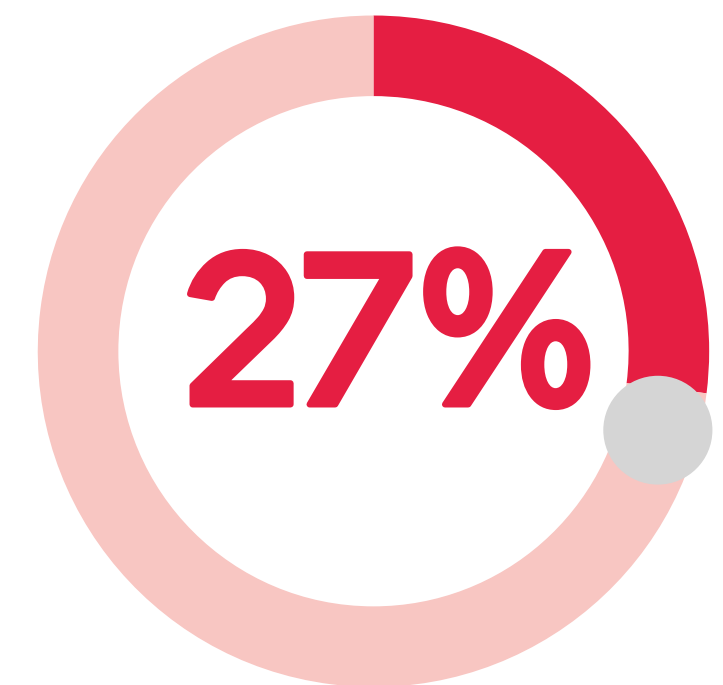
Women, people with disabilities and ethnic minority respondents are all more likely to say they are unfairly spoken over, undervalued compared to colleagues of equal competence, bullied or made to feel uncomfortable in the workplace. People with disabilities reported living the worst work experiences (45% versus 67% non-disabled).



of **women** are more likely to say they are unfairly spoken over. The same is true for 39% of disabled respondents and 30% for ethnic minority respondents



of **ethnic minority respondents** are more likely to say they feel undervalued compared to colleagues of equal competence. The same is true for 31% of women and 42% of disabled respondents

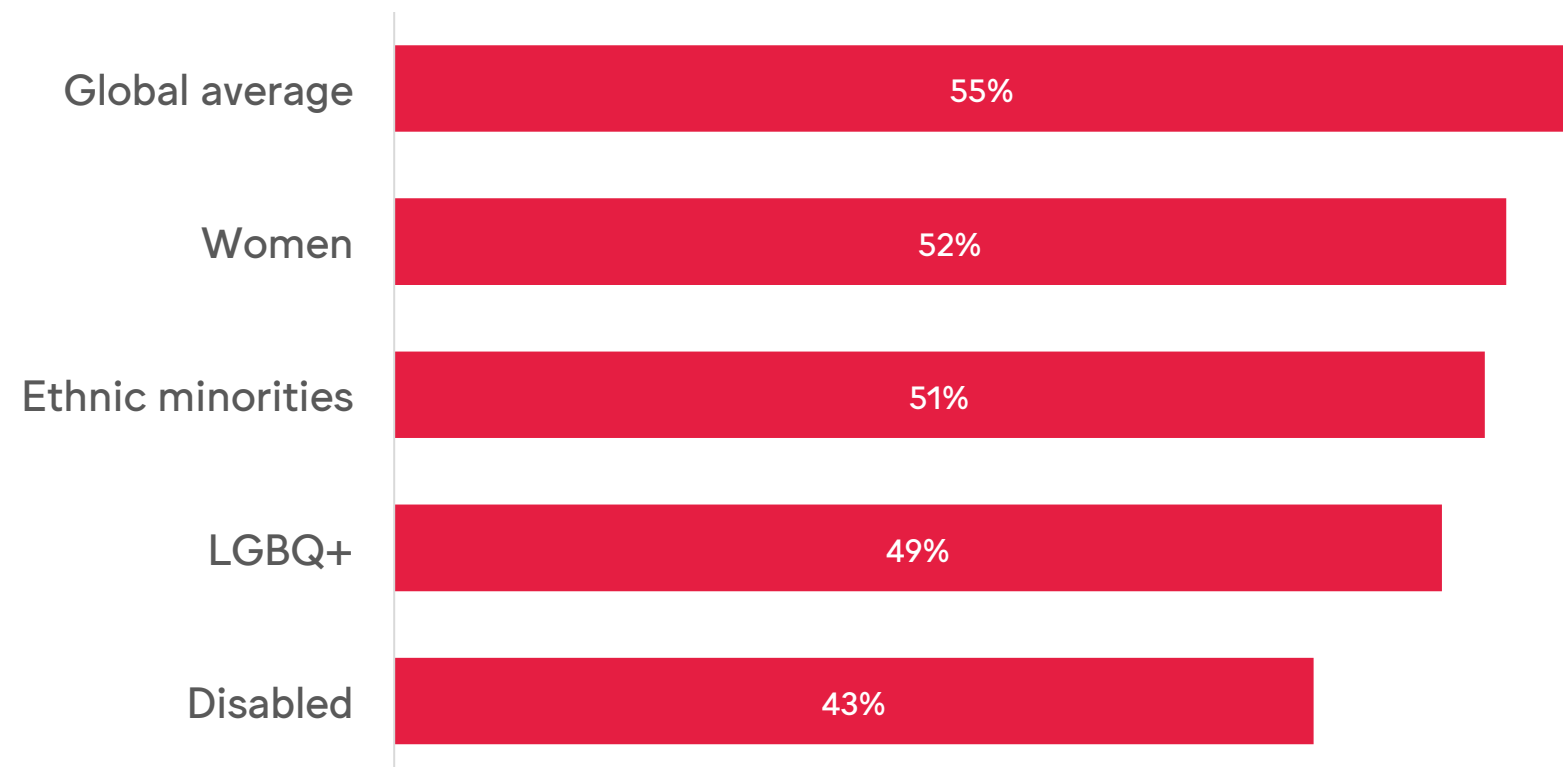


of **disabled respondents** report being bullied, undermined or harassed

Key groups are still under-represented in senior positions and report promotion or hiring decisions are discriminatory, as well as lack of role models

Do you believe that senior management do not discriminate when it comes to hiring and career advancements of those that report into them?

Those who answered 'yes', by group



Do you see people like yourself in senior positions?

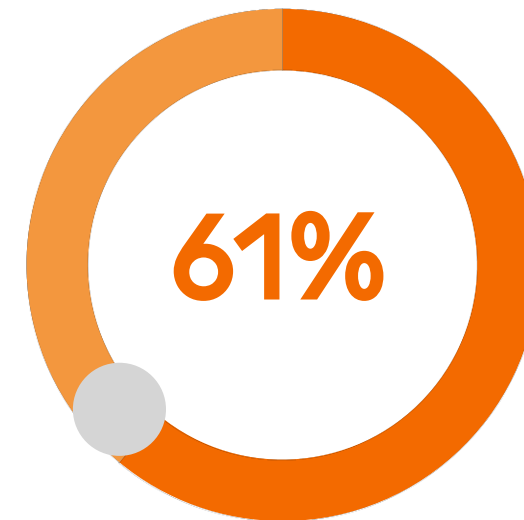
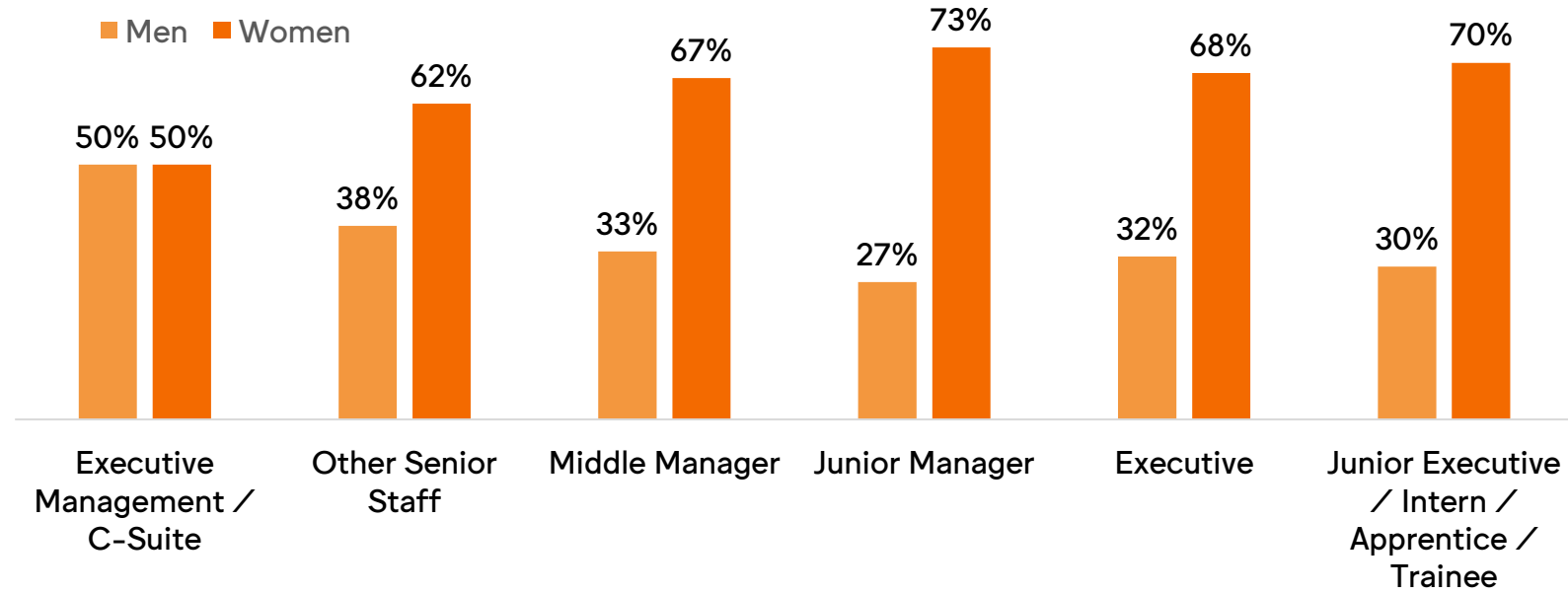
Those who answered 'yes', by group



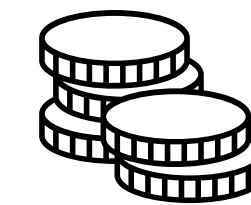
Gender

Women may feel almost equally to men that their company is taking active steps in being more diverse and inclusive at a global level. Nevertheless, women are still under-represented at the most senior levels of industry, with male respondents twice more likely to be in C-Suite positions.

%Men vs Women by seniority levels (global averages)

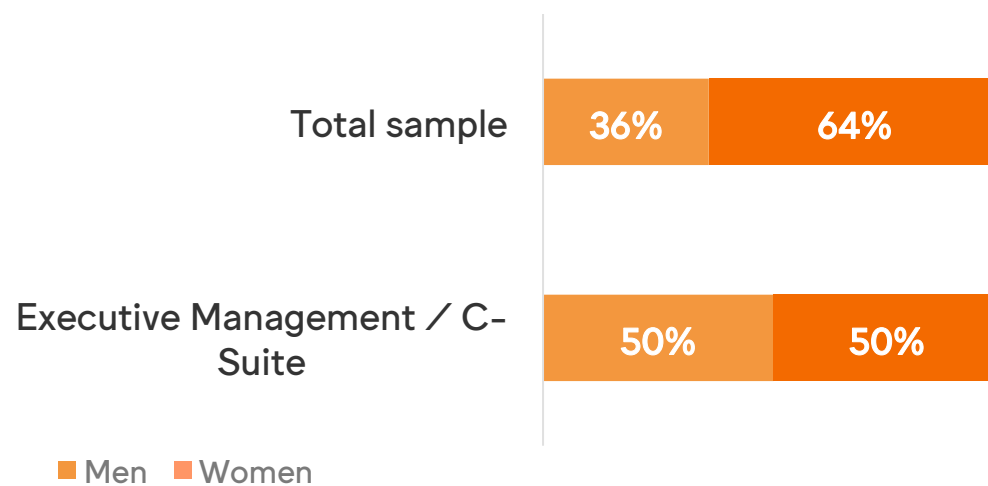


Inclusion Score for Women versus 69% for Men
No change since 2021



33%

1 in 3 agree their **company provides equal pay for equal work**, versus 1 in 2 men (47%)



23%

of women feel that **gender hinders your career**



36%

of women who took parental leave in the last 5 years said this **disadvantaged their career** versus 8% of men

Ethnicity

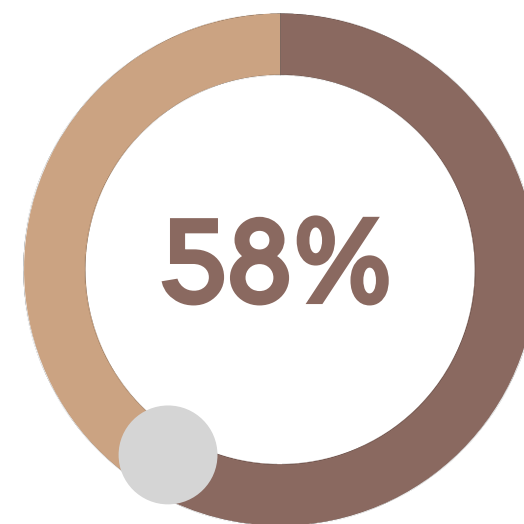
Generally, ethnic minorities report greater discrimination, more negative behaviours in the workplace and less sense of belonging and are under-represented, particularly at more senior levels.



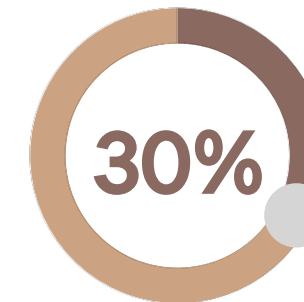
of ethnic minority respondents compared to 61% of their ethnic majority counterparts agree that **there are people like them in senior positions**

2x

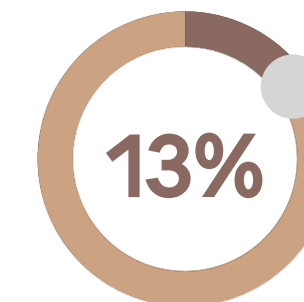
Ethnic minorities are twice as likely to **leave the industry due to a lack of inclusion** and/or discrimination they've experienced



Inclusion Score for Ethnic minority versus 64% for Ethnic majority



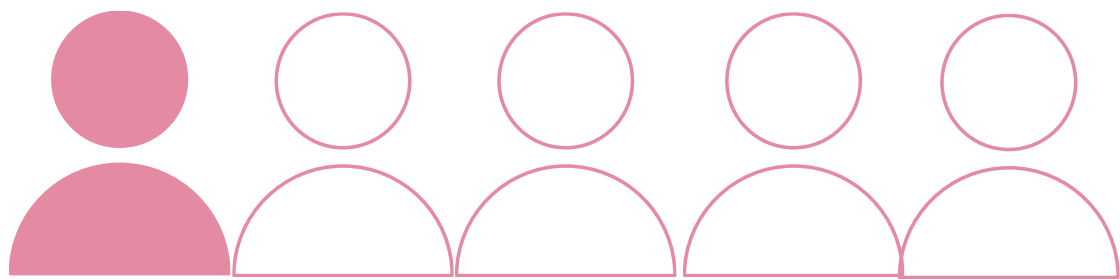
Of ethnic minority respondents felt that **ethnicity hinders one's career** (versus 13% ethnic majority)



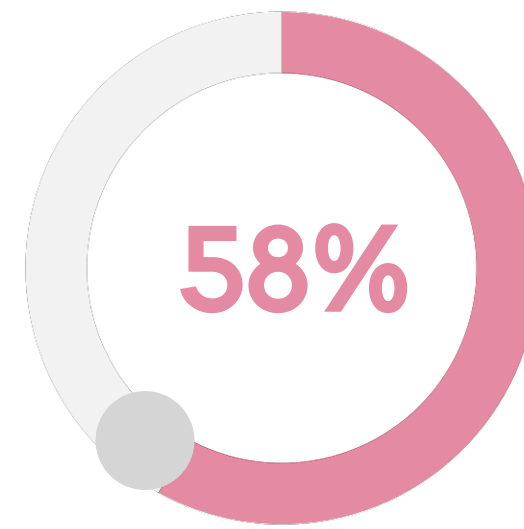
Of ethnic minority respondents report **experiencing discrimination** based on their race/ethnicity

Sexuality

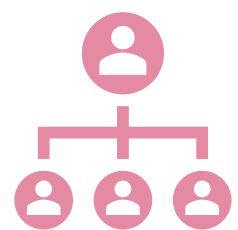
While the number of LGBTQ+ respondents increased since 2021, generally they continue to report a lower sense of inclusion; the Inclusion Index has dropped by 2% since 2021 and they report discrimination and more negative behaviours in the workplace.



1 in 5 survey respondents report being LGBTQ+ vs 16% in 2021

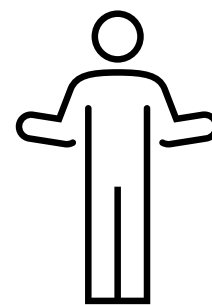


Inclusion Score for LGBTQ+ versus 65% for heterosexual respondents
-2ppts. since 2021



47%

of LGBTQ+ respondents agree that there are people like them in senior positions

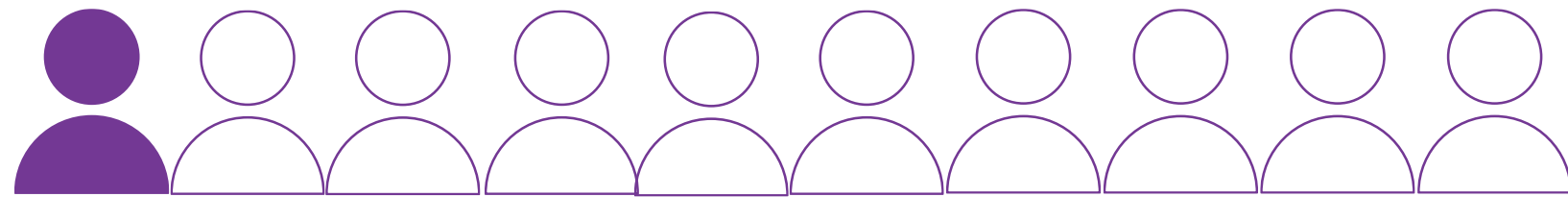


28%

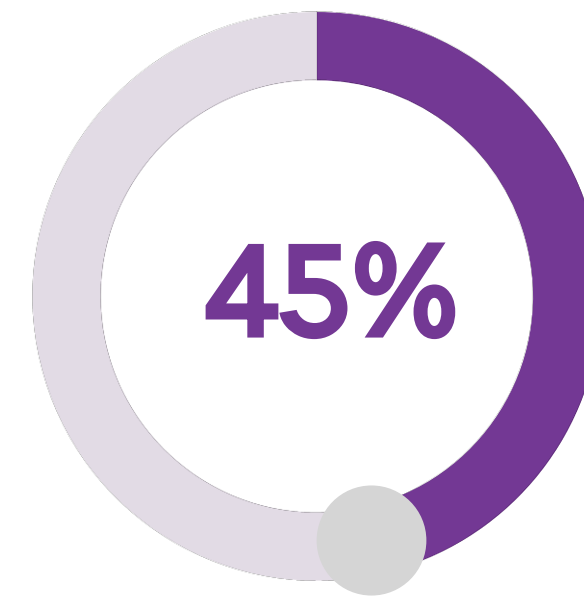
of LGBTQ+ respondents reported being made to feel uncomfortable in the workplace in the last 12 months

Disability

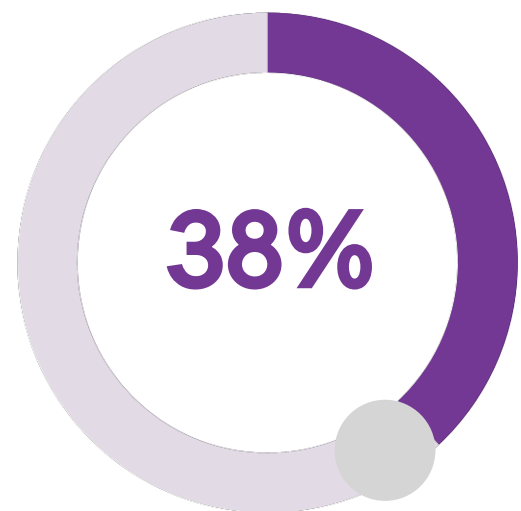
Of all the groups, disabled respondents reported living the worst work experiences overall.



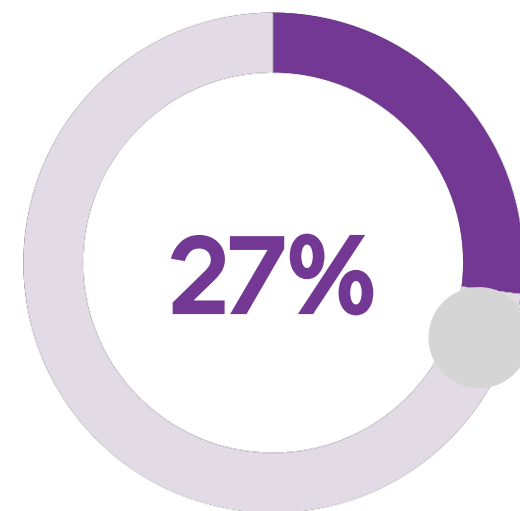
1 in 10 survey respondents report a disability
vs 7% in 2021, global benchmark: 15%



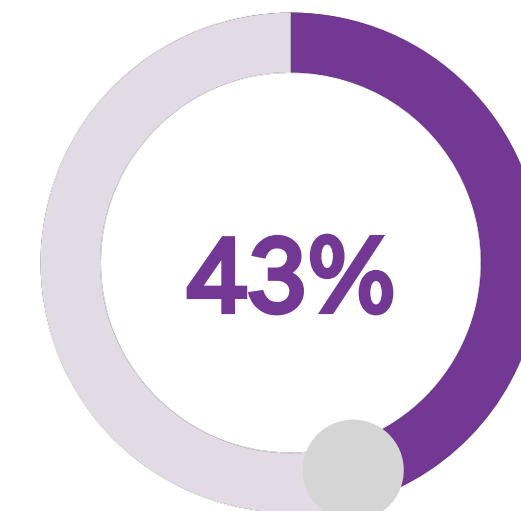
Inclusion Score for disabled respondents versus 67% for non-disabled



feel their disability status has **hindered** their career



report being **bullied, undermined or harassed**

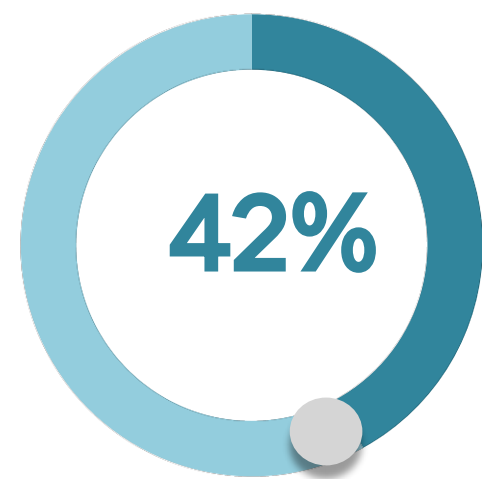


agree that **senior managers** are fair when it comes to hiring or career advancements

Mental health

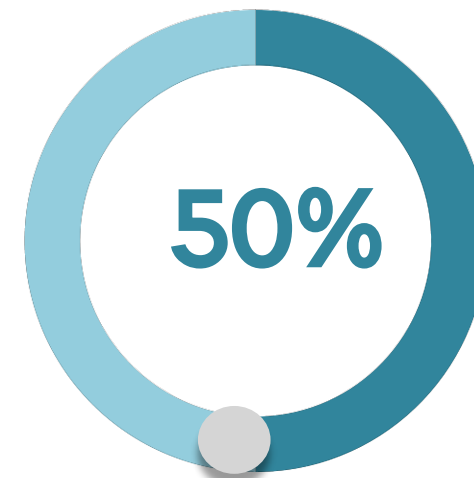
Mental health is also an important concern with 42% respondents saying they feel stressed and anxious at work and 27% agreeing that “my work is having a negative physical impact on health and mental health”. Overall, one in two say their company is open about mental health issues.

I am often very stressed at work - % agree



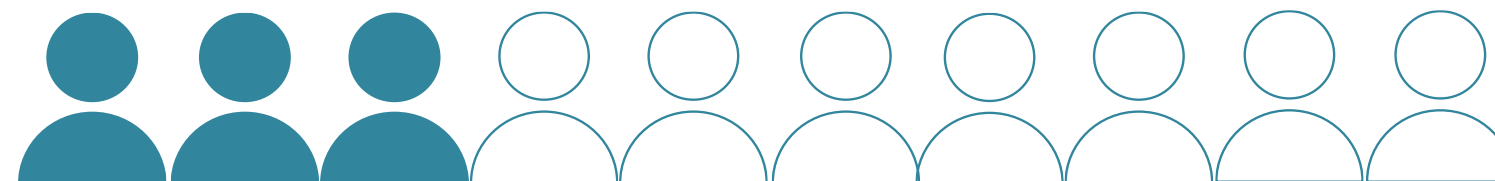
Italy: 52% agree
Netherlands: 26% agree

My workplace is open about mental health - % agree



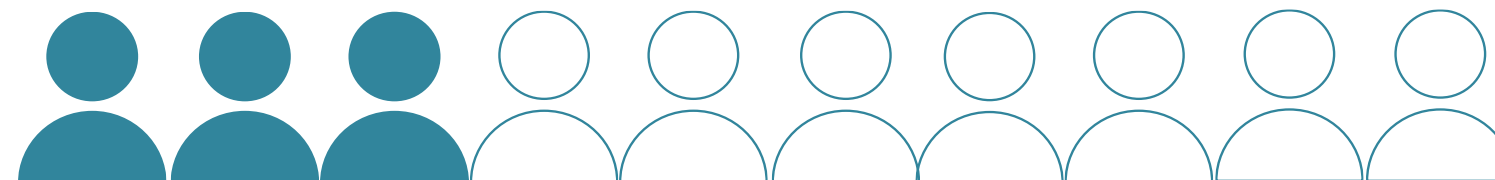
Italy: 31% agree
Philippines: 67% agree

“ My work is having a negative impact on my physical health



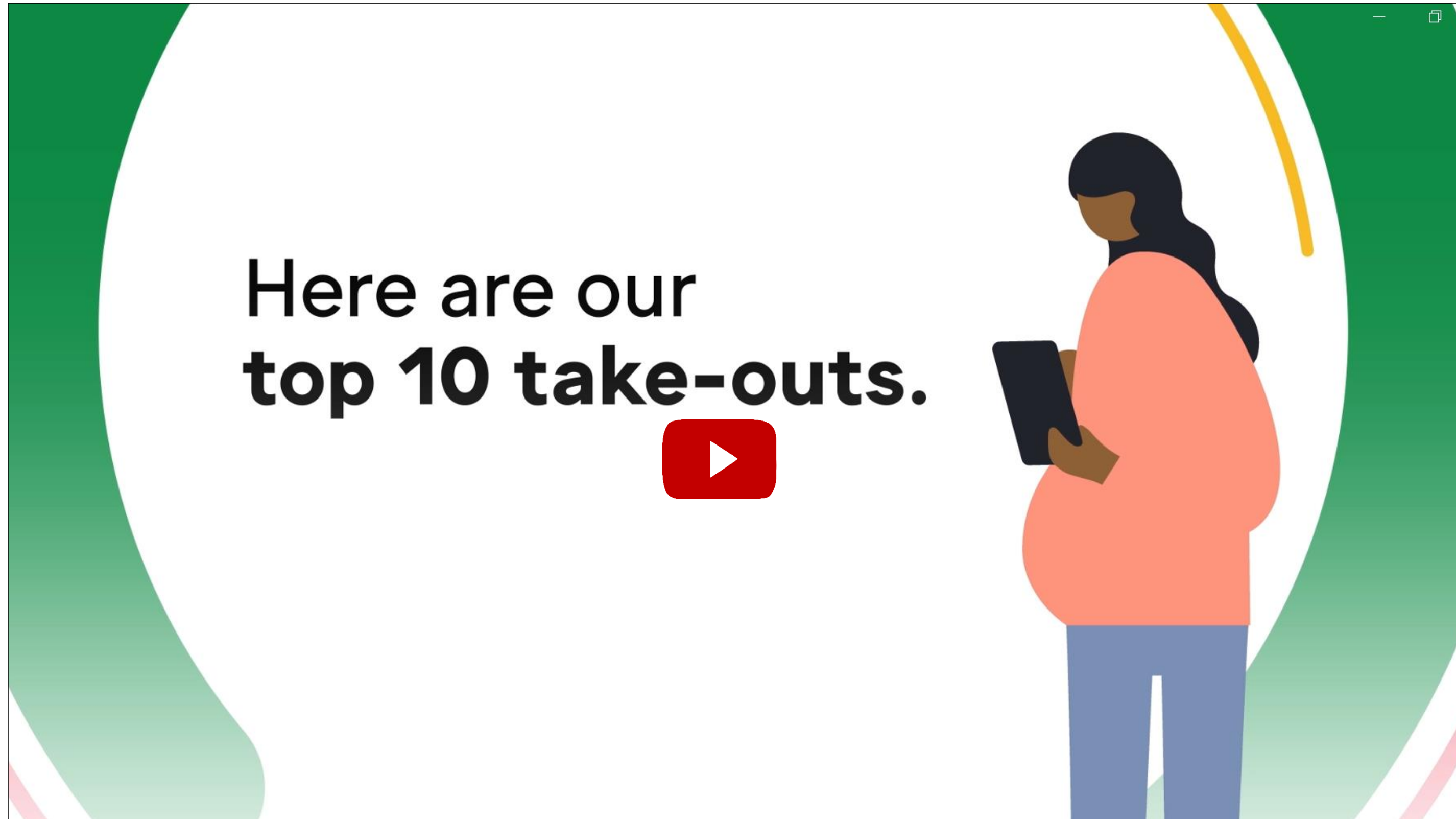
Global: 27% agree
Poland: 42% agree
Brazil: 18% agree

“ My work is having a negative impact on my mental health



Global: 27% agree
Poland: 40% agree
Finland: 17% agree

Our top 10 take-outs



Appendix

Kantar is able to calculate an inclusion score on the basis of asking questions about people's sense of belonging, the absence of discrimination and presence of negative behaviours. This allows Kantar to benchmark every market against the global average and to compare our industry's performance against benchmarks from other industries. These questions are:

Company sense of belonging:

How strongly do you agree or disagree with these statements?

- I feel like I belong at my company.
- I am valued and essential part of my direct team.
- I am valued and essential part of my company.
- I am emotionally and socially supported at work.
- My unique attributes, characteristics, skills, experience and background are valued in my company.
- Most employees in my company feel comfortable being themselves.
- Senior managers are fair when it comes to hiring or career advancements of those who report into them.
- I am provided with sufficient support to develop my skills and progress my career.

Presence of negative behaviour:

Have you experienced any of the following within the last 12 months at your company?

Yes/No

- Unfairly spoken over or not listened to in meetings.
- Learning opportunities or progress restricted by senior colleagues.
- Undervalued compared to colleagues of equal competence.
- People taking sole credit for shared efforts.
- Bullied or undermined in anyway.
- Physical harassment or violence.
- Exclusion from events or activities.
- Made to feel uncomfortable in the workplace.

Absence of discrimination:

At your company, have you personally experienced negative discrimination in the following areas?

Yes/No

- Age
- Gender
- Family responsibilities
- Race
- Religion
- Disability status
- Sexual orientation
- Appearance
- Social background



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