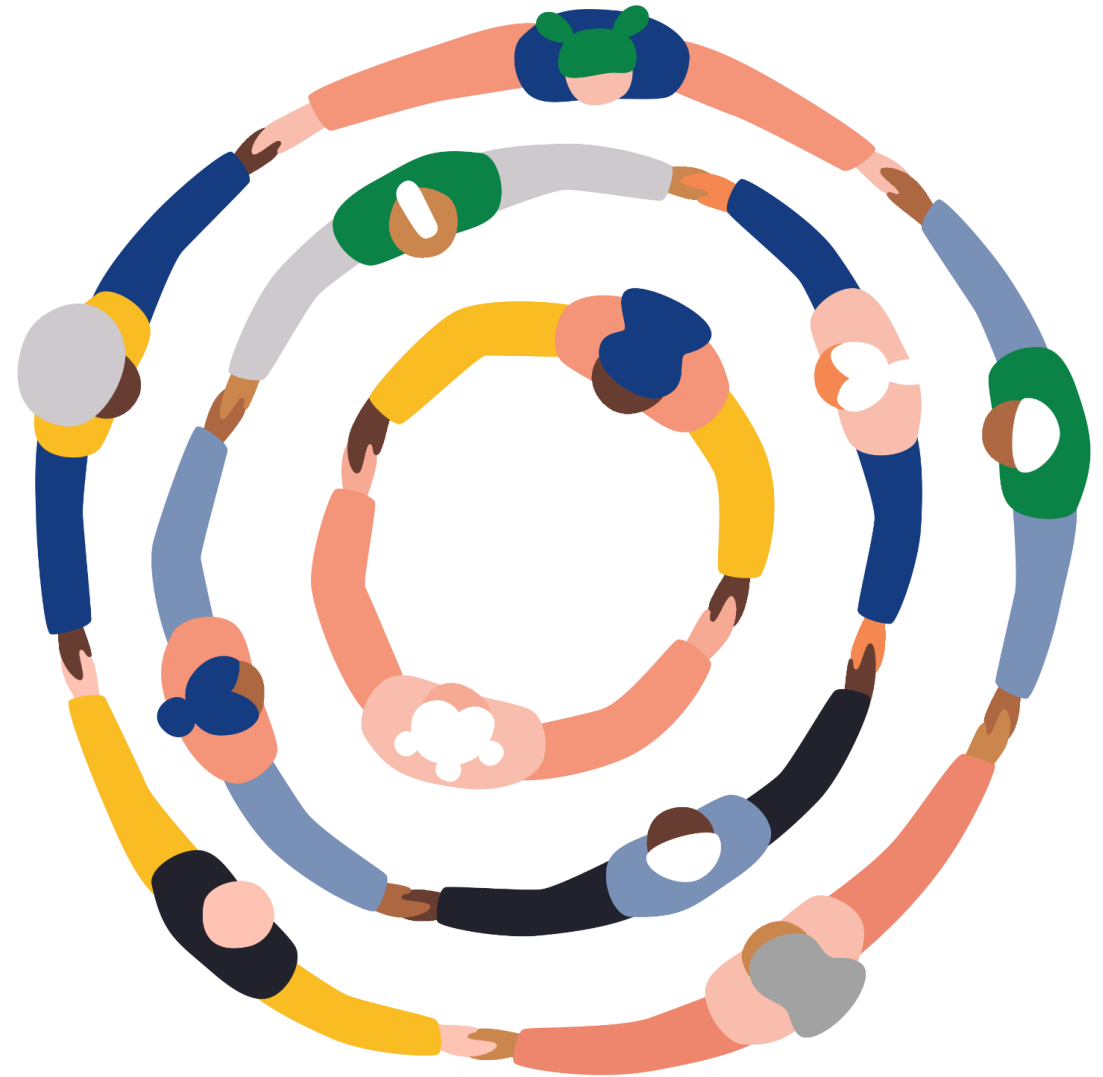


The Global DEI Census

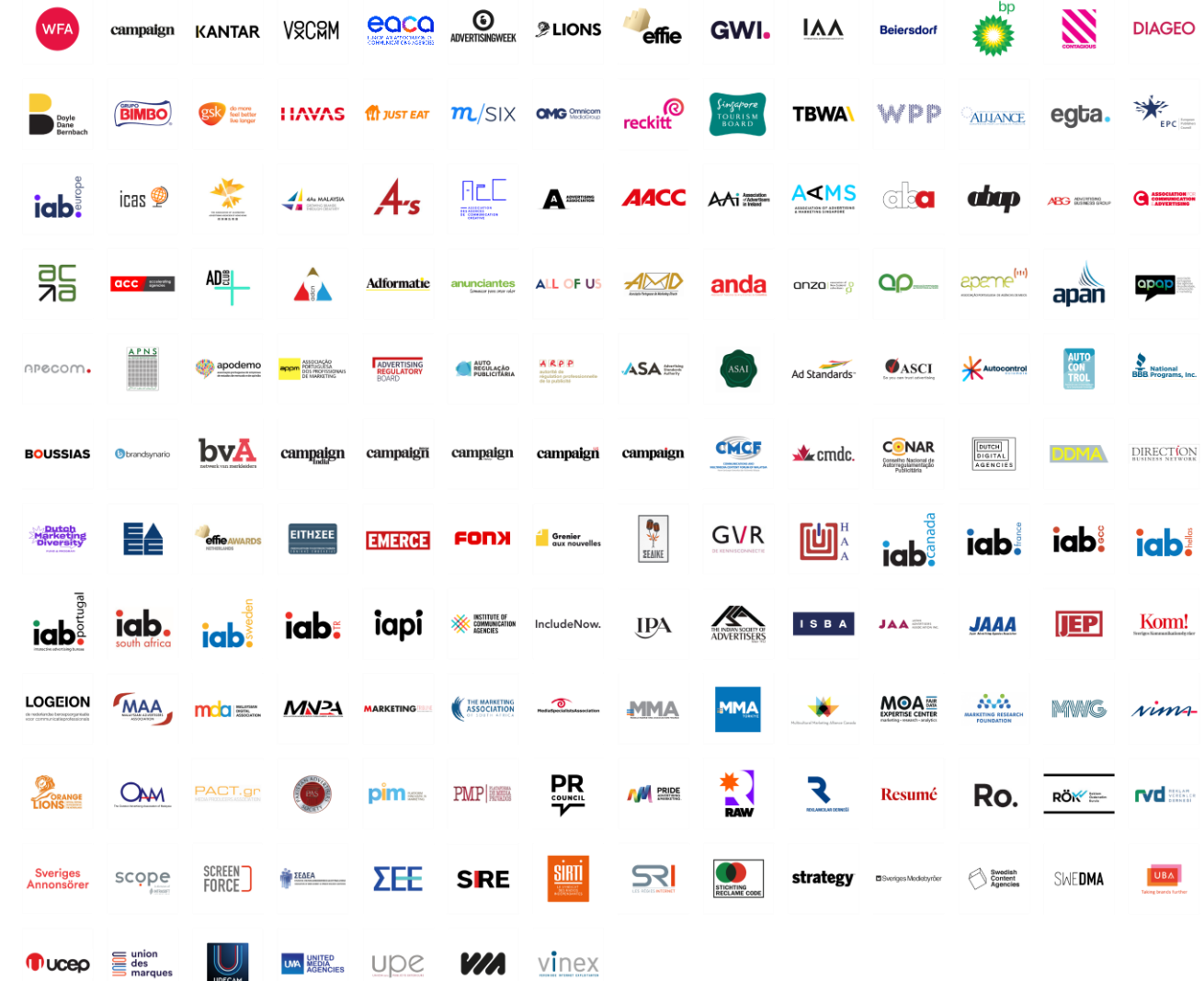
Preliminary results

18 October 2021



Biggest ever collaboration by the global marketing industry

- Over 160+ organisations
- An historic first-ever global survey of the marketing industry using the UK All In Census as a blueprint



NB: This is not a census

1. Of course there's no such thing as an optional census
2. But it's a **critical proof of concept**
3. 10,000 people's lived experiences from 27 markets
4. To be repeated in Spring 2023 to measure progress

Methodology

The survey

- Online survey conducted in June–July 2021
- All conducted anonymously
- Survey looks at:
 - Demographic aspects (e.g. age, ethnicity, religion, disability, in accordance with legal frameworks in markets)
 - People’s experiences at their companies
- Men represented 41%, women 58%, gender non-conforming 1% of respondents

Participating markets

Belgium, Brazil, Canada, Colombia, France, Greece, the Gulf Cooperation Council (Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, and the UAE), Hong Kong SAR, China, India, Ireland, Japan, Malaysia, the Netherlands, New Zealand, Pakistan, Portugal, Singapore, South Africa, Spain, Sweden, Turkey and USA

Kantar’s Inclusion Index

The questions interrogate an employee’s perception of the environment and their experience at the company.

- Sense of Belonging
- Absence of Discrimination
- Presence of Demeaning Behaviour

The Inclusion Score = [Company sense of belonging + Absence of discrimination] – Presence of negative behaviour

Sample

10,349 participants from 27 countries

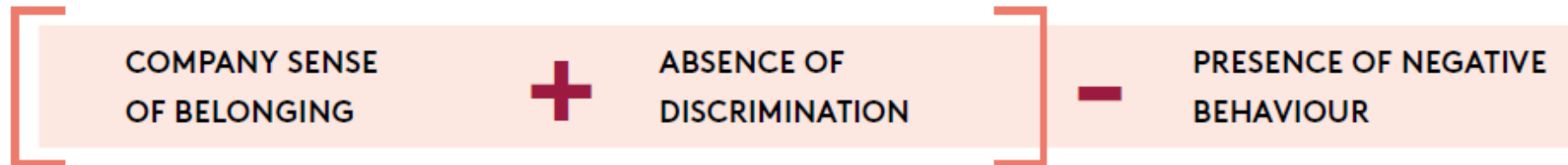
Main findings

1. Globally, the marketing industry performs better than other industries measured by Kantar;
2. Most common forms of discrimination are reported on basis of age and family status;
3. Women's lived experiences are notably poorer than men's;
4. There is strong evidence of a gender pay gap;
5. The lived experiences of minorities are poorer;
6. There are pay gaps linked to ethnicity, but they can represent positive and negative discrimination in equal measure;
7. A significant minority report mental health issues; very often they do not tell their employer;
8. Globally, a majority say they feel a strong sense of belonging to their company (but this varies a lot between markets);
9. A significant minority say they would leave their company and the industry on the basis of a lack of diversity and inclusion;
10. Most feel their organisations are taking action to be more diverse and inclusive, but some markets lag significantly; and
11. Responses indicate very different inclusion scores between markets.

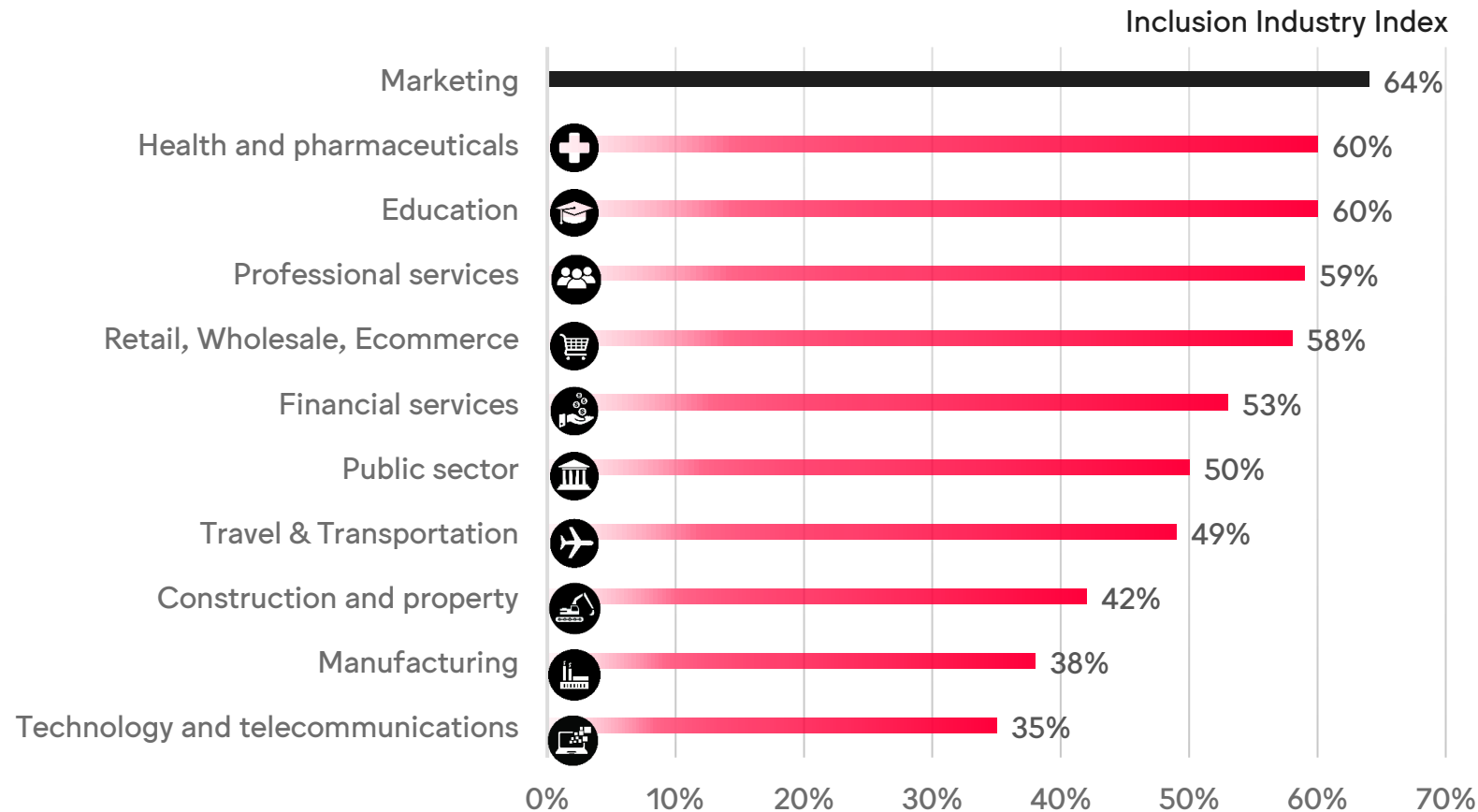
What is the Kantar Inclusion Index?

INCLUSION SCORE

The Inclusion Score is the following formula:



1. Globally, the marketing industry performs better than other industries measured* by Kantar

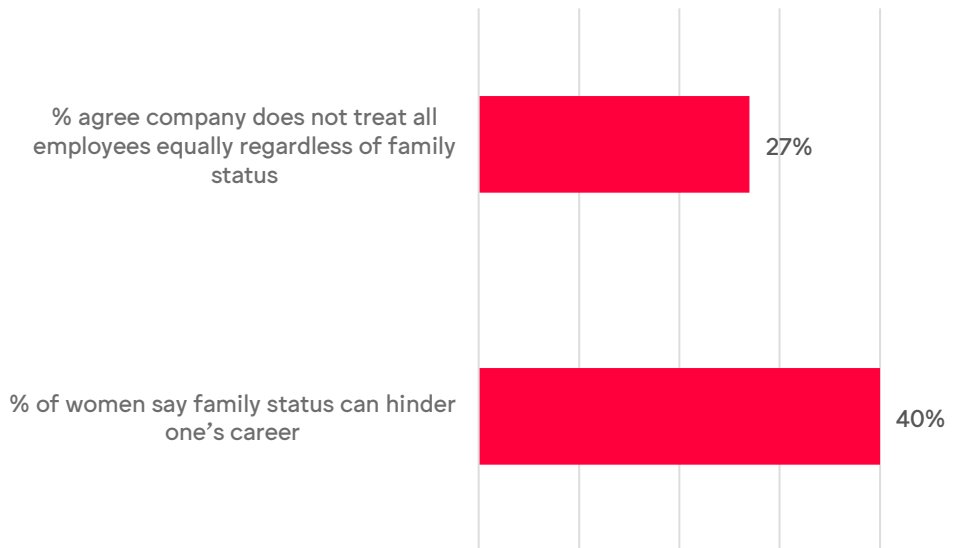


*This survey was conducted in a different sample of countries to the [Kantar Inclusion Index 2019](#)



2. Most common forms of discrimination are reported on the basis of family status* and age

Family status



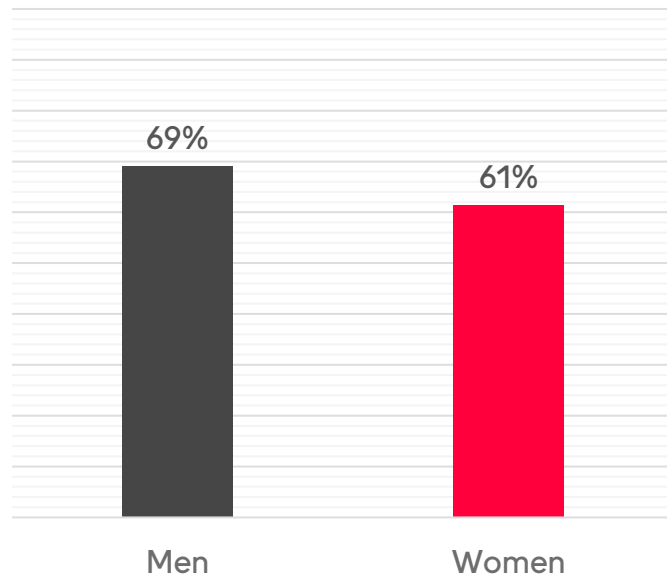
Age



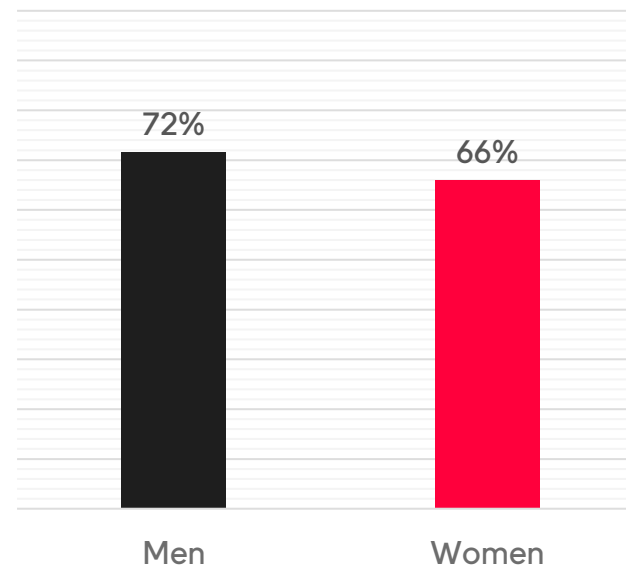
*Family status includes if respondents have childcare responsibilities or other caregiver responsibilities, i.e. they look after or give help or support to anyone because they have long-term physical or mental health conditions or illnesses, or problems related to old age, etc

3. Globally, women's lived experiences are notably poorer than men's

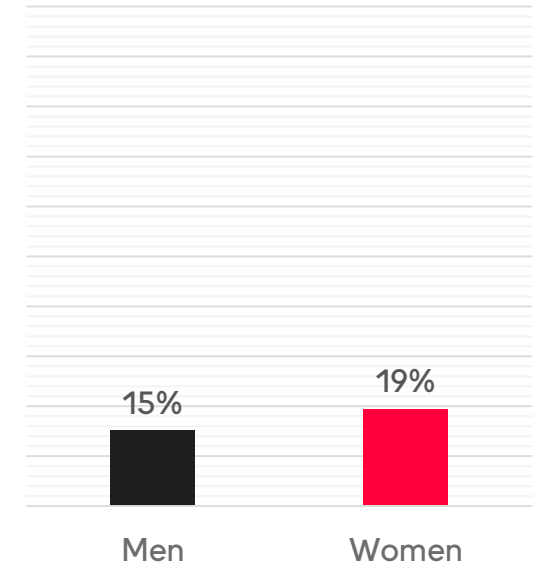
Inclusion Index
(global average)



Company sense of belonging
(global average)



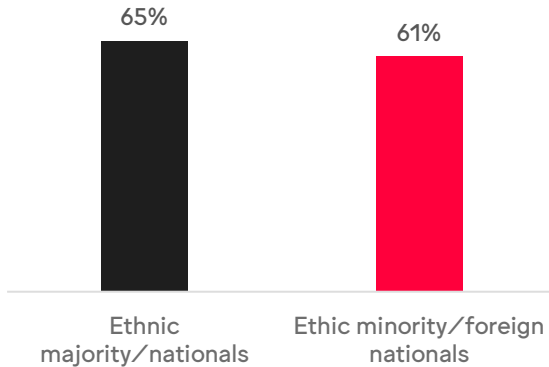
Presence of negative behaviour at work
(global average)



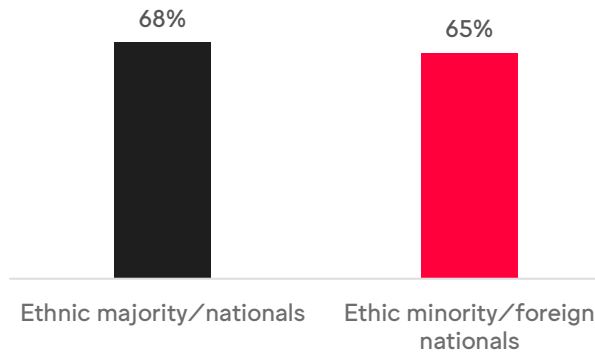
5. The lived experiences of minorities are poorer

Our definition of minorities currently includes ethnic minorities such as Latinx or Black in the USA, as well as expats in Singapore or Dubai, which means the data underestimates the extent to which minorities can have poorer experiences. WFA and Kantar will continue to work on the data to identify a true reflection of the challenge.

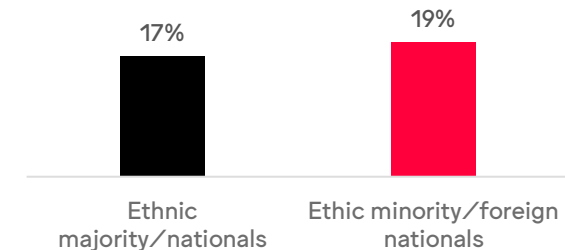
Inclusion Index (global average)



Company sense of belonging (global average)



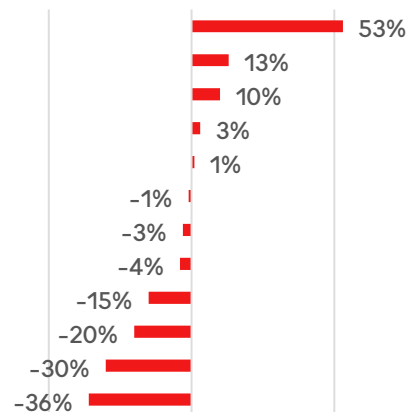
Presence of negative behaviour (global average)



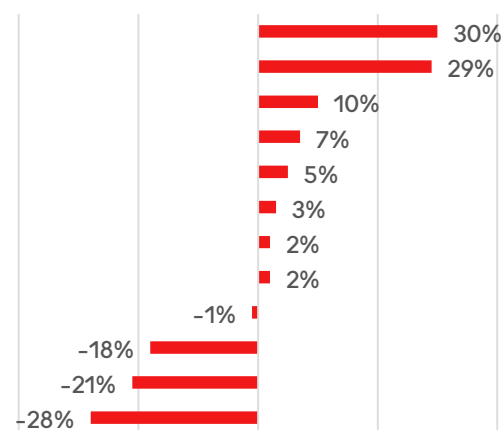
6. There are pay gaps linked to ethnicity but they can represent positive and negative discrimination in equal measure

Depending on the country surveyed, ethnic minorities (including foreign nationals as defined in previous slide) are often paid more or less than their majority counterparts and sometimes up to 50% more or less depending on the market.

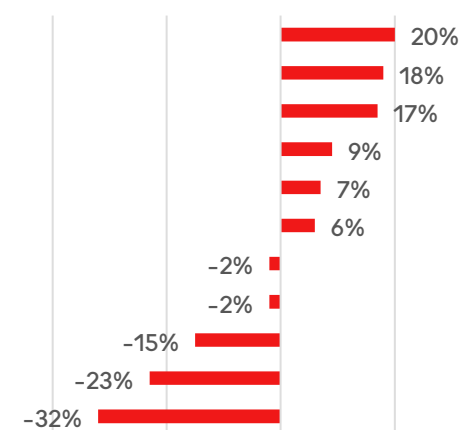
Exec management/c-suite



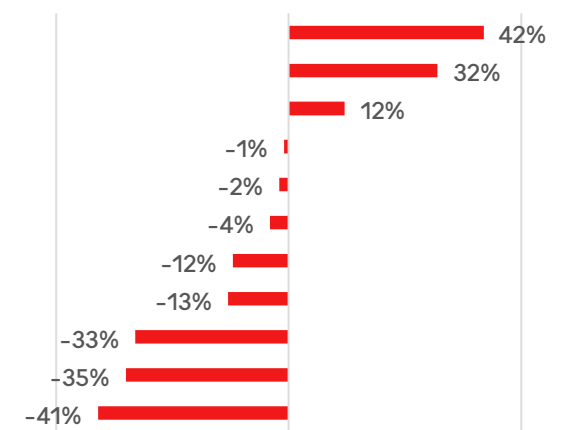
Other senior staff



Middle manager



Junior manager



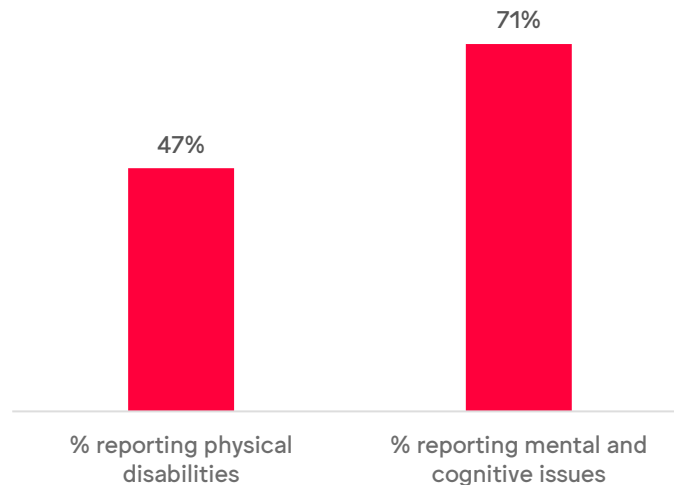
Note: These are indicative pay gaps only based on salary bands selected and not on actual salary data

7. A significant minority report mental health issues; very often they do not tell their employer

Respondents to have reported lasting* health conditions** (global average)



of those disabled globally...



My company is aware of my health concerns / impairment / disability (% of global respondents agreeing)



My company is supportive regarding my health issues/conditions (% of global respondents agreeing)

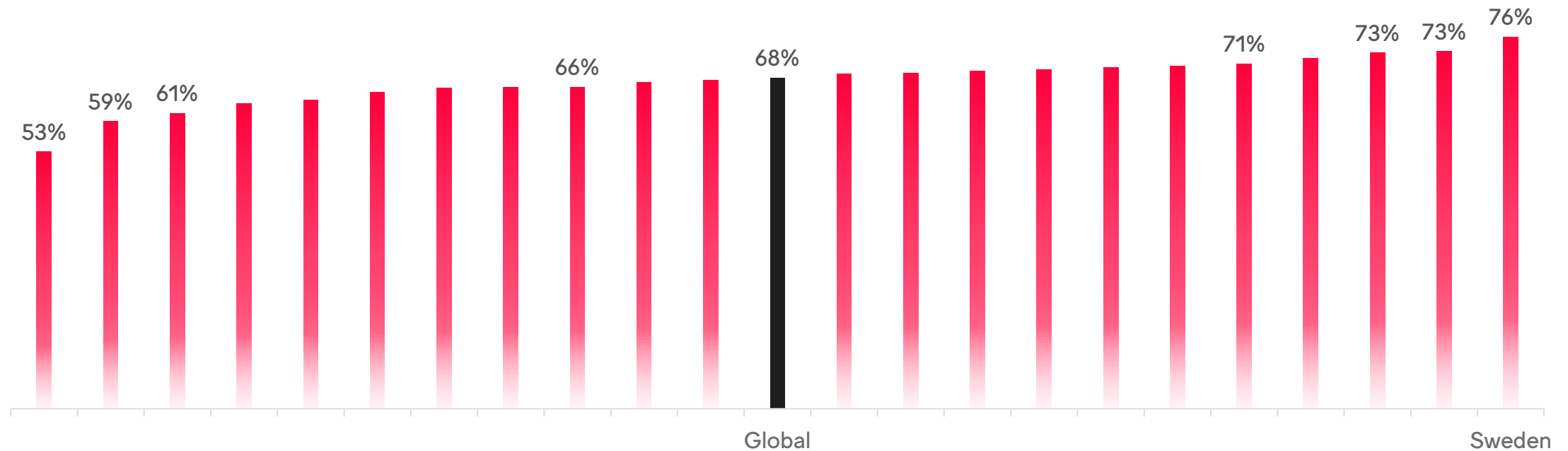


*12 months or more

**mobility impairments, fatigue/lack of stamina, breathing capacity, neurodiversity, visual impairments, motor skill impairments, mental health, stress/anxiety, hearing impairments

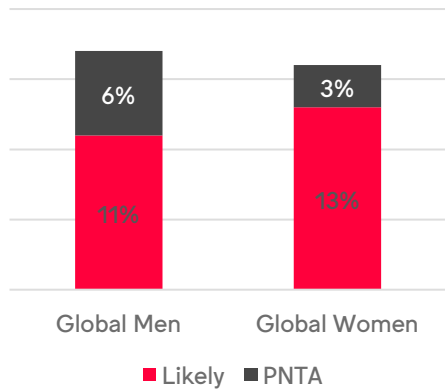
8. Globally, a majority say they feel a strong sense of belonging to their company (but this varies a lot between markets)

Company sense of belonging, by market

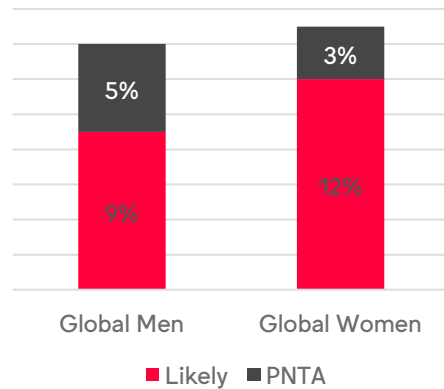


9. A significant minority say they would leave their company and the industry on the basis of a lack of diversity and inclusion

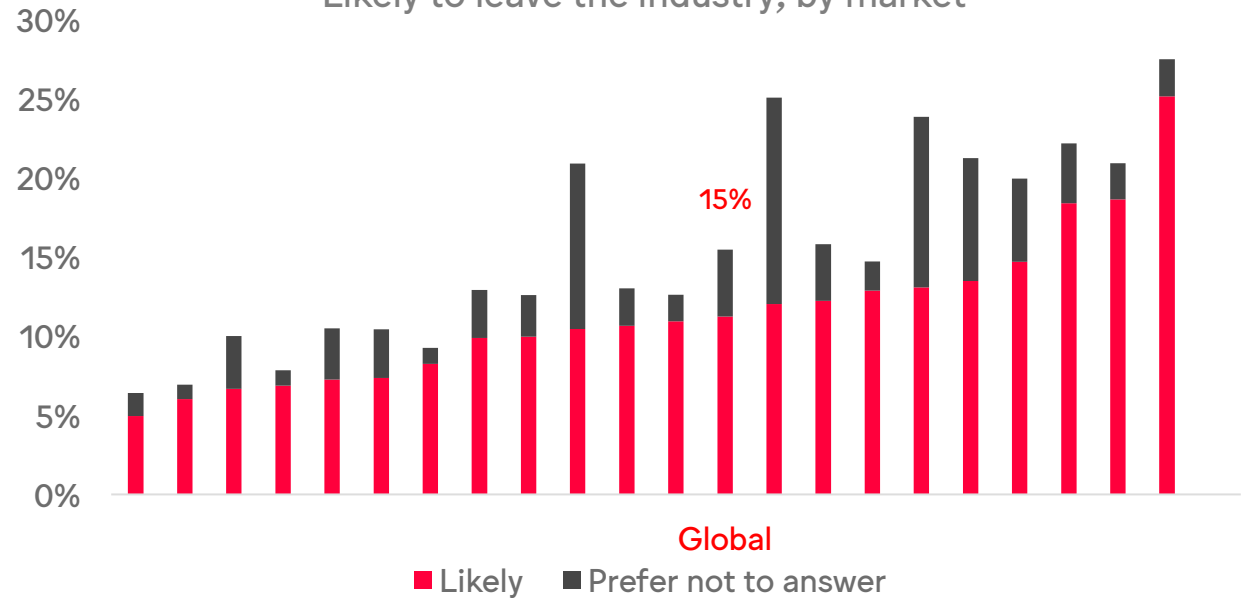
Likelihood of leaving current organisation



Likelihood of leaving the industry



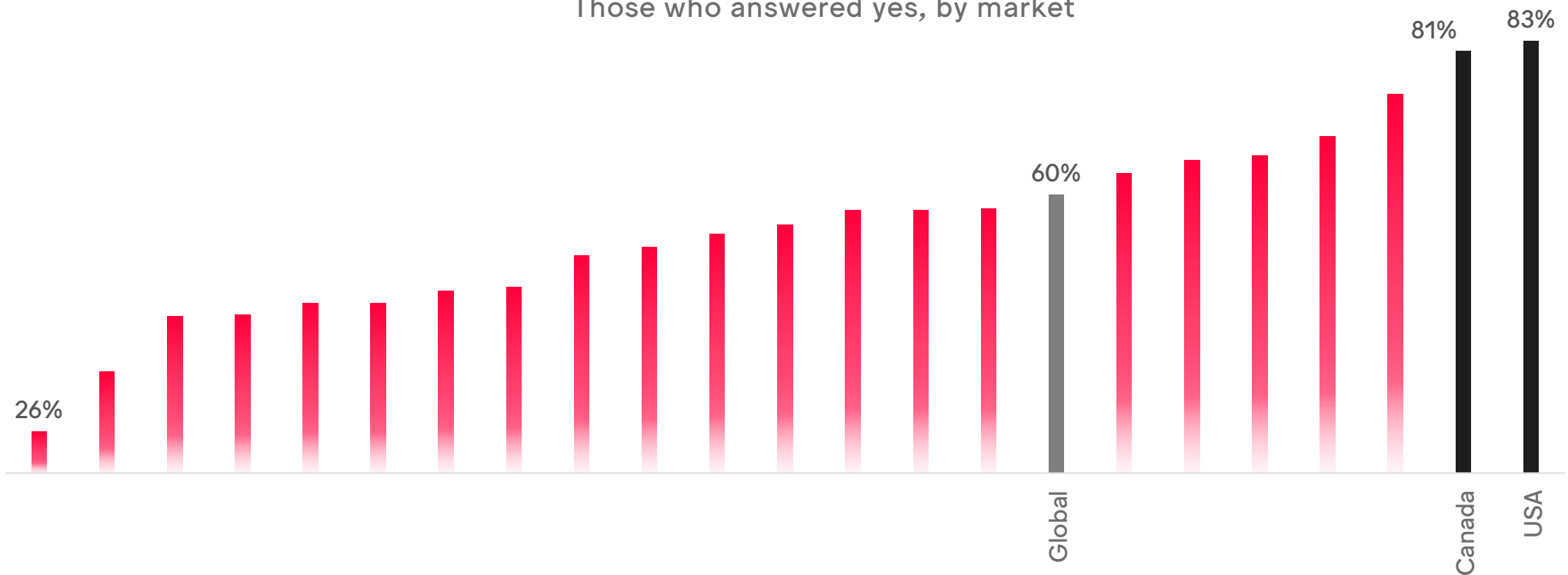
Likely to leave the industry, by market



Kantar consider those who preferred not to answer (PNTA) as a risk for leaving their current role or the industry, hence why we include these responses.

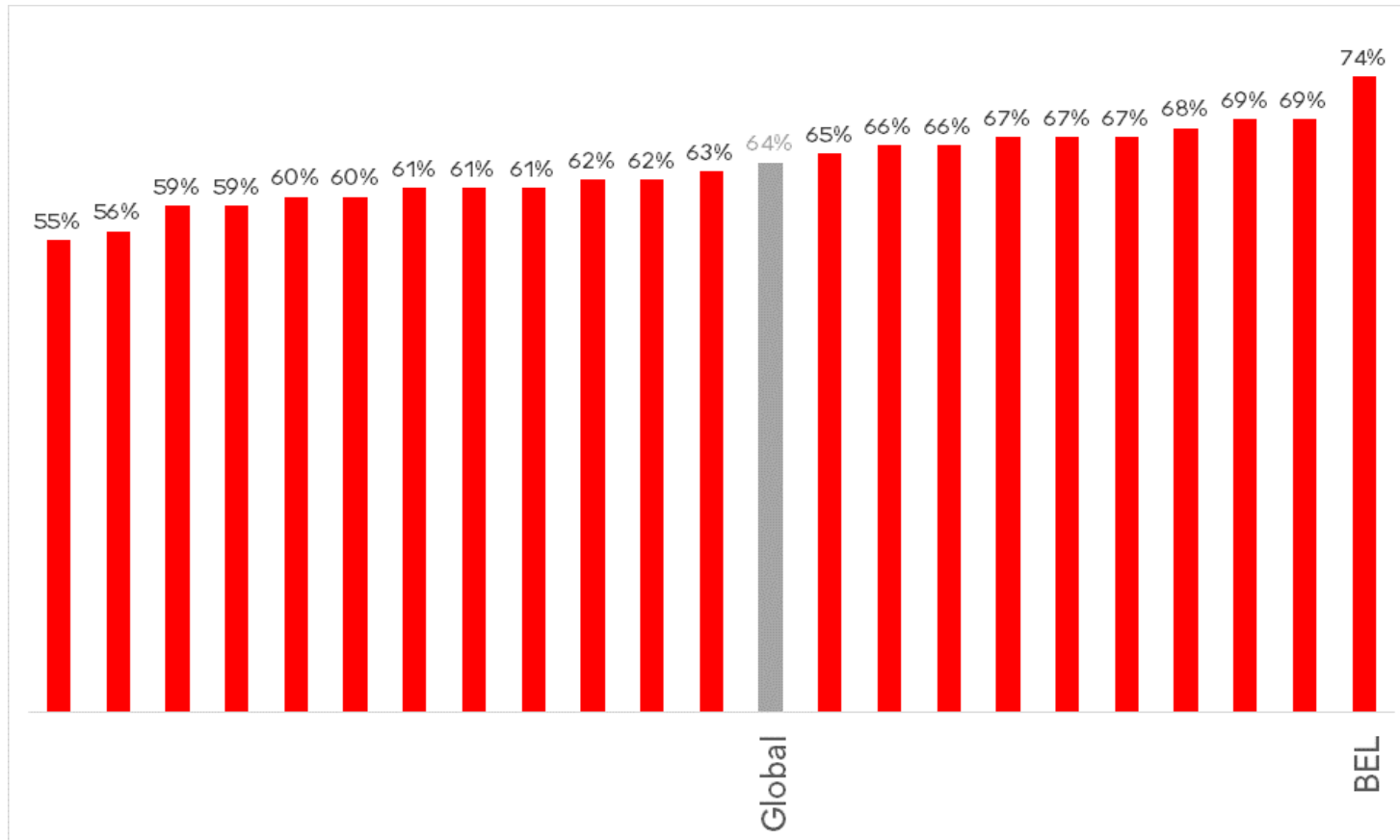
10. Most feel their organisations are taking action to be more diverse and inclusive, but some markets lag significantly

Those who answered yes, by market



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

11. There was a 19 percentage point range on the overall inclusion score; Belgium scored the highest with 74%



Index questions

Company sense of belonging:

How strongly do you agree or disagree with these statements?

1. Strongly disagree
2. Disagree
3. Neither agree or disagree
4. Agree
5. Strongly agree
99. Prefer not to answer

- I feel like I belong at my company.
- I am a valued and essential part of my direct team.
- I am a 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 that 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 any way.
- 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 area? Yes/No

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



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