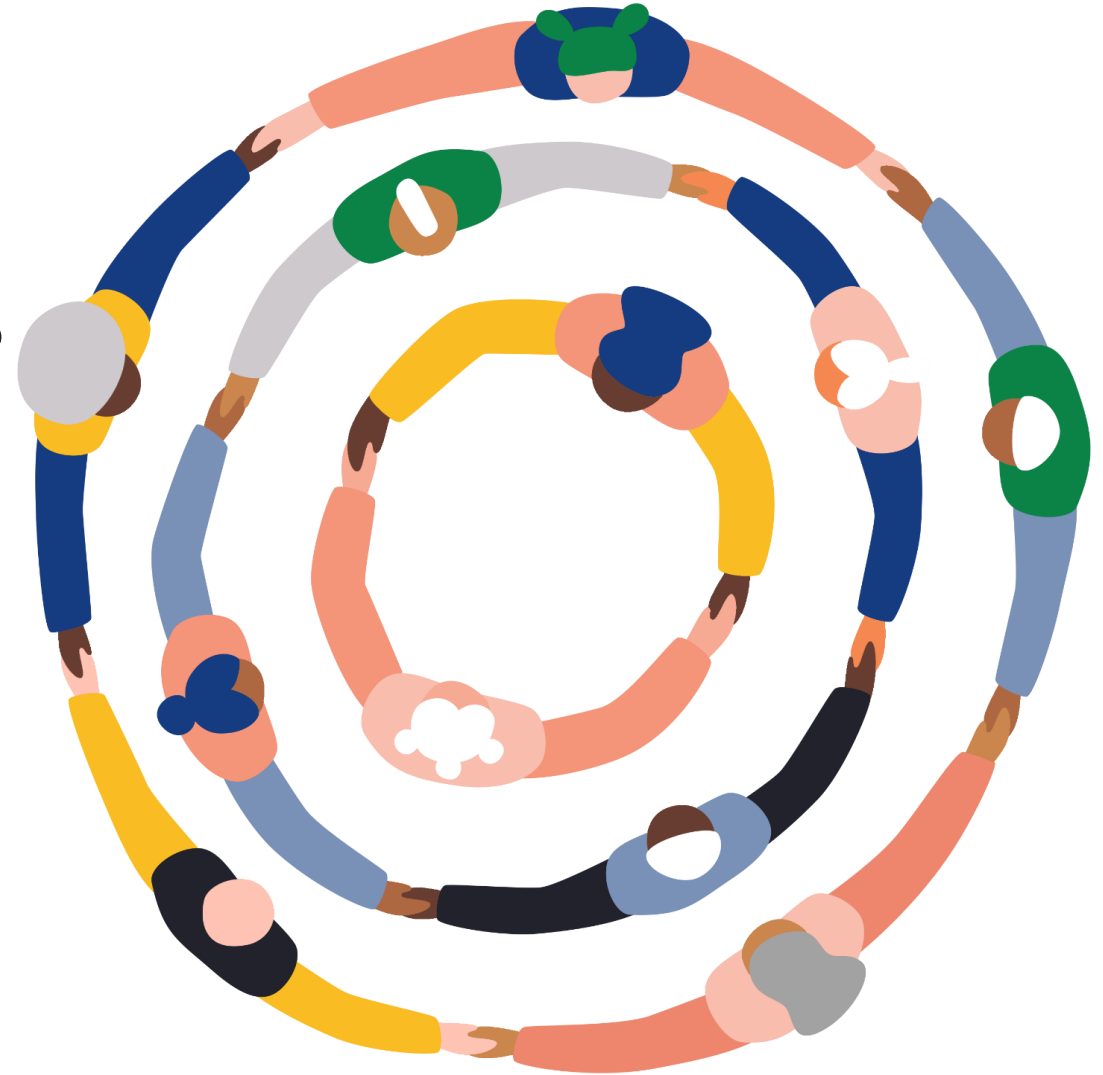


The Global DEI Census

Preliminary results

17 November 2021
EACA Exclusive session



Results schedule

1. Preliminary results (today)
2. Market reports (issued to national associations)
3. WFA event on 9th December with full global report release planned

Agency lens

We have reviewed the data through an agency lens at a global level.

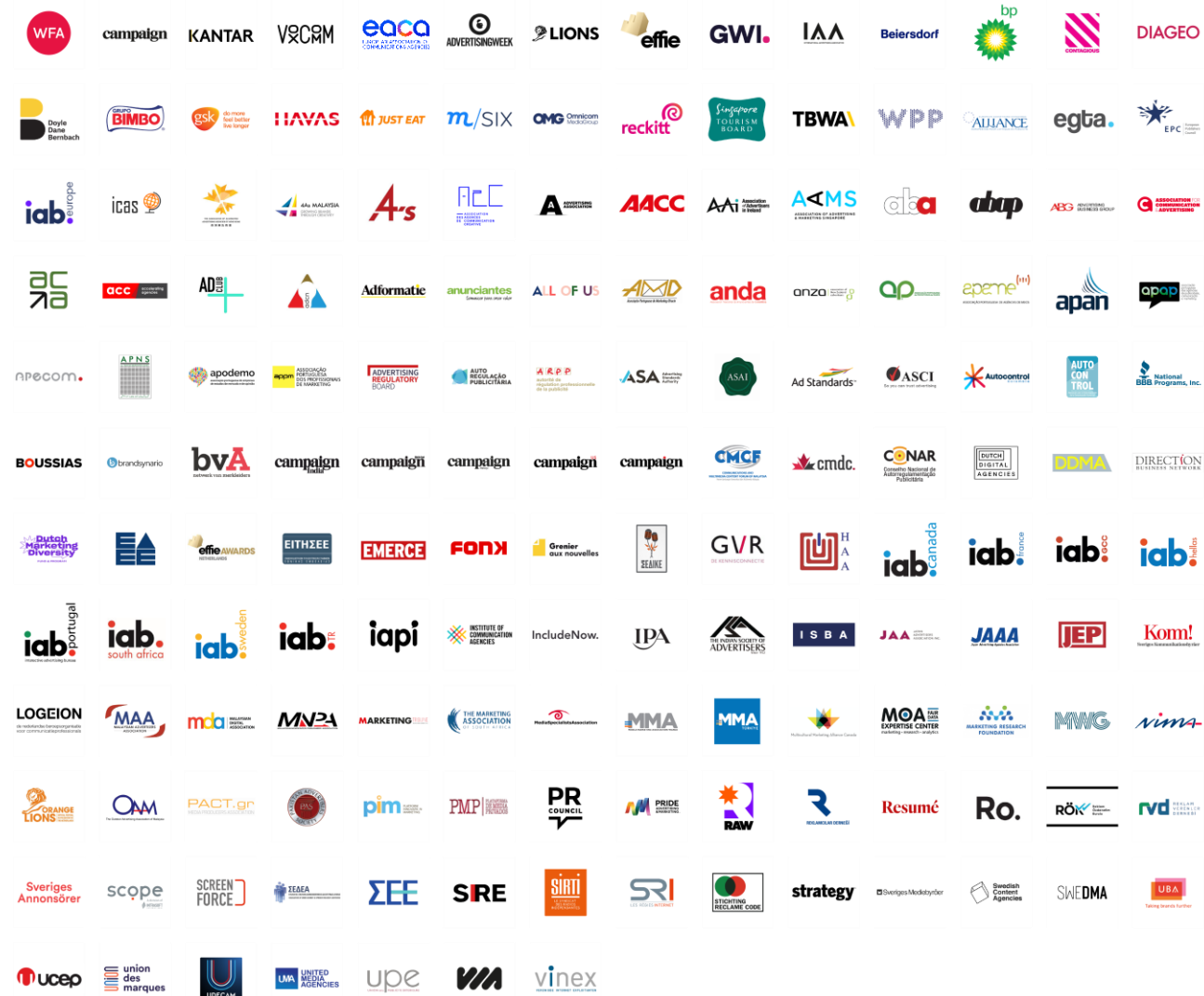
Agencies make up a significant proportion of the data (49%).

When calculating the overall index for agencies, there was only a 1% difference in the overall score.

We have therefore agreed there is limited value in running market data for agencies only and the overall results can be used by everyone in the industry.

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
- Please join us in Wave II in Spring 2023



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

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

What is the Kantar Inclusion Index?

INCLUSION SCORE

The Inclusion Score is the following formula:

$$\left[\begin{array}{cc} \text{COMPANY SENSE} & + \end{array} \right] \text{ABSENCE OF} \\ \text{OF BELONGING} & \text{DISCRIMINATION} \end{array} - \text{PRESENCE OF NEGATIVE} \\ & \text{BEHAVIOUR}$$

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.

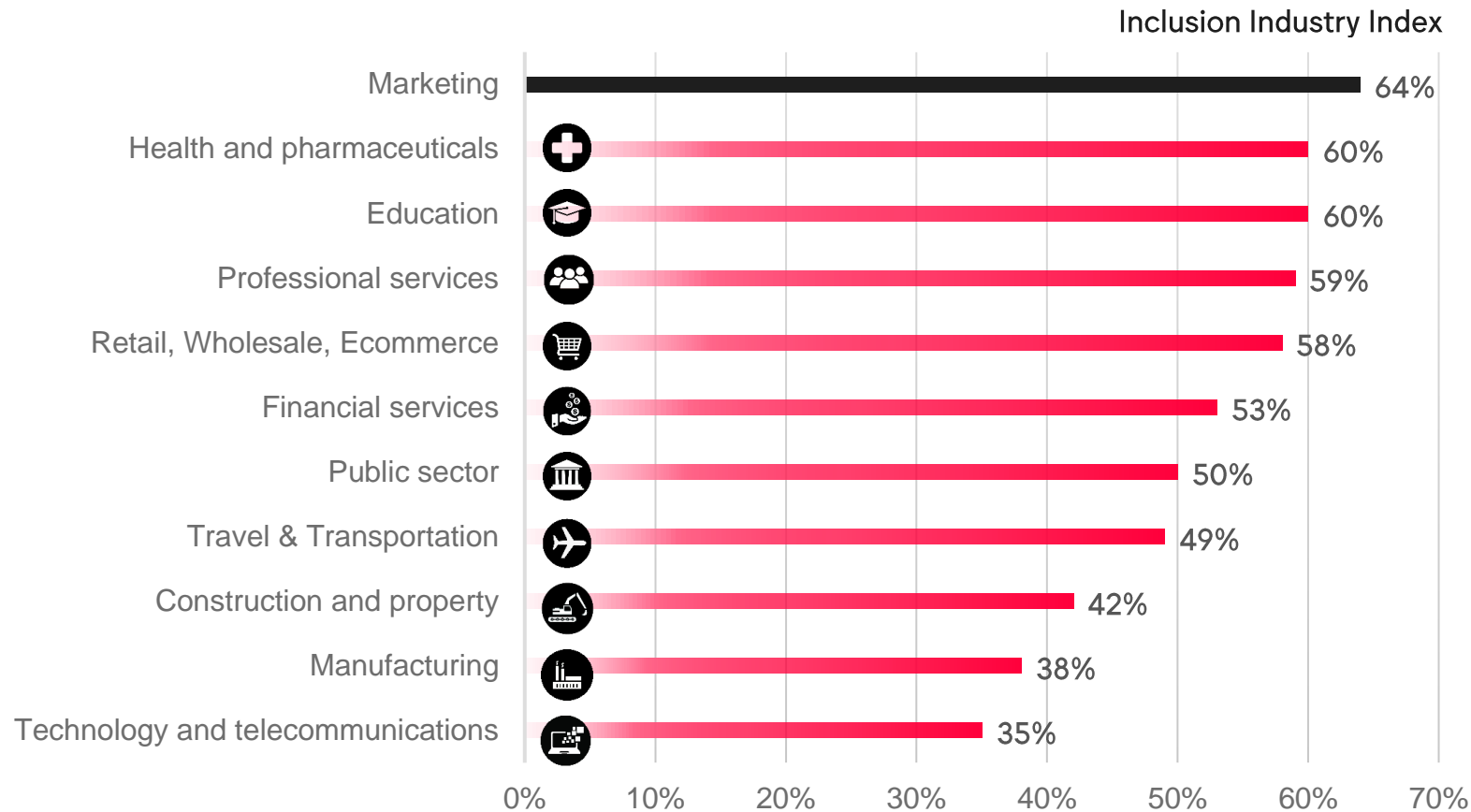
Presence of negative behaviour: Have you experienced any of the following within the last 12 months at your company? Yes/No

- 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

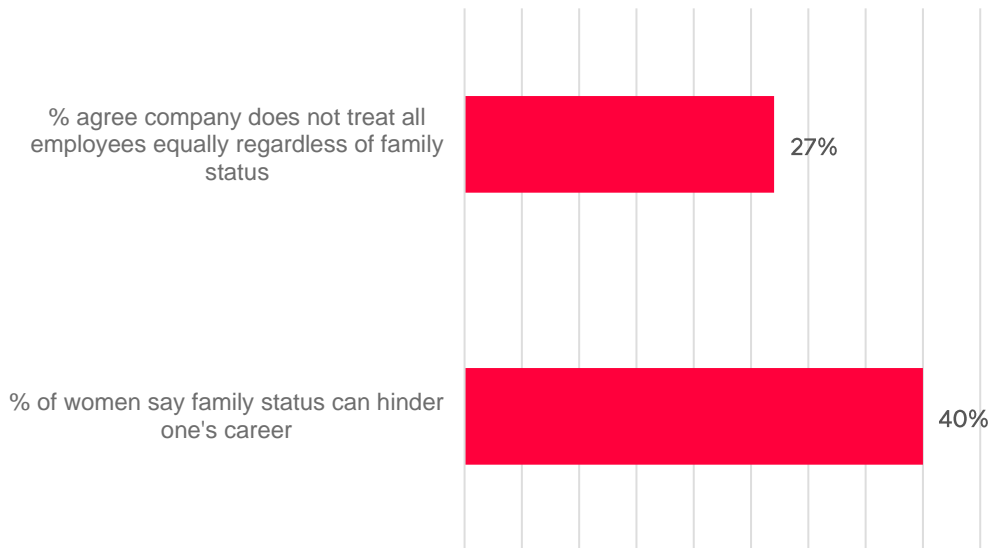
1. Globally, the marketing industry performs better than other industries measured* by Kantar



*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



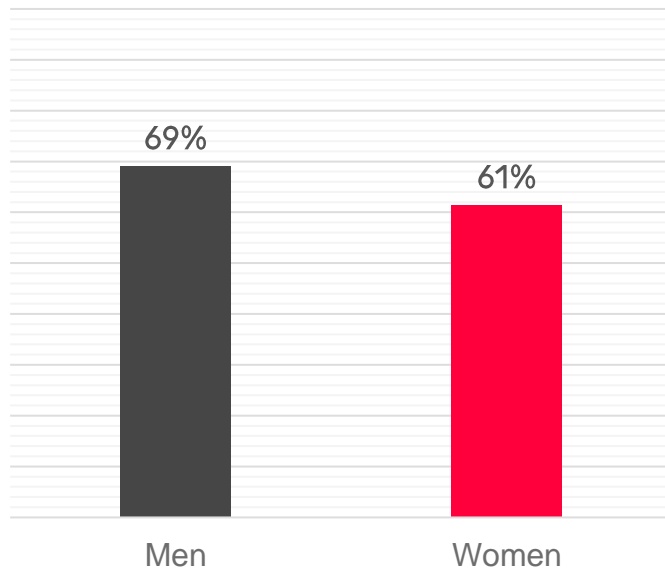
Age



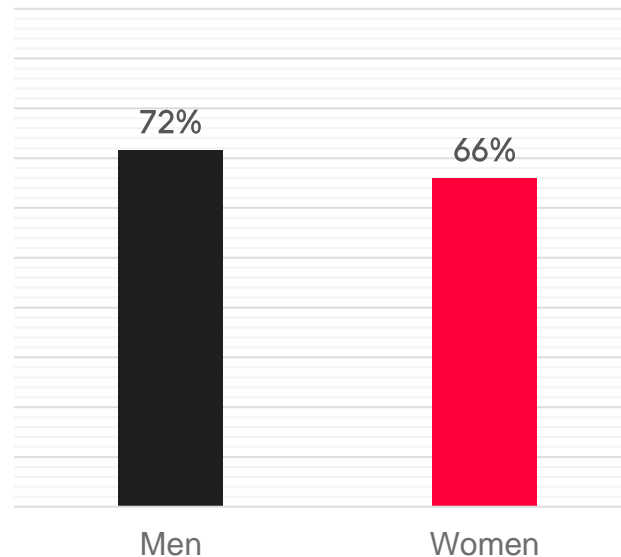
**Family status includes if respondents have childcare responsibilities or other caregiver responsibilities, i.e. they look after or give help or support to anyone because they have long-term physical or mental health conditions or illnesses, or problems related to old age, etc*

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

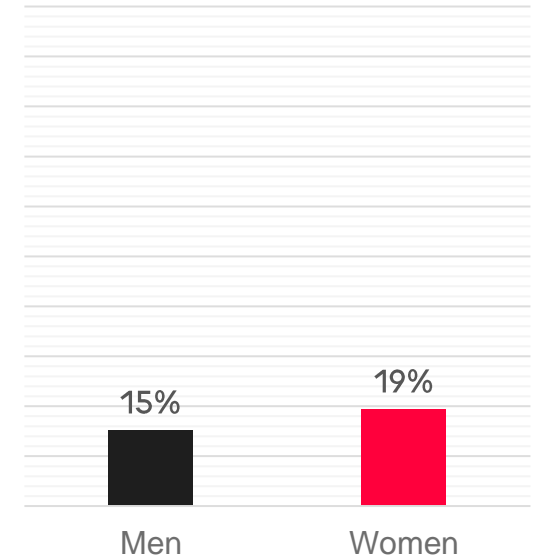
Inclusion Index
(global average)



Company sense of belonging
(global average)

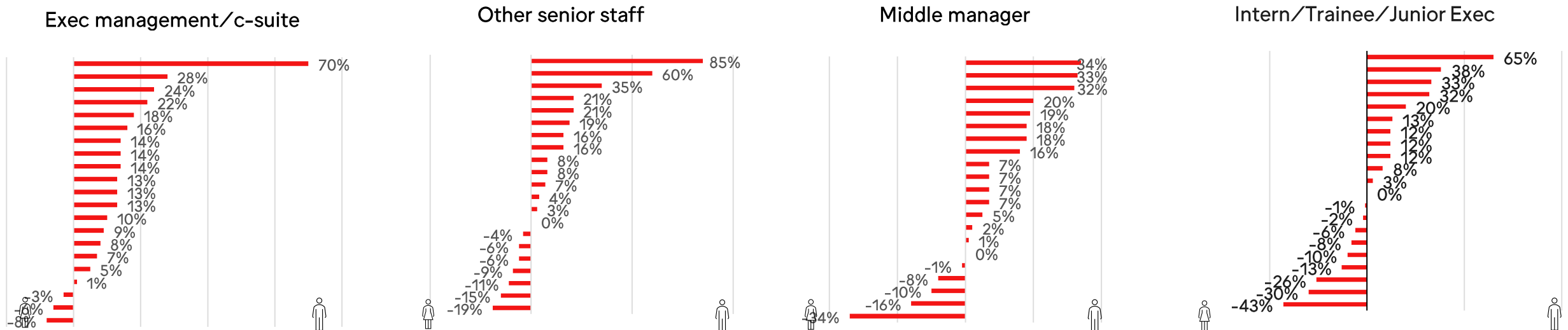


Presence of negative behaviour at
work (global average)



4. There is strong evidence of a gender pay gap

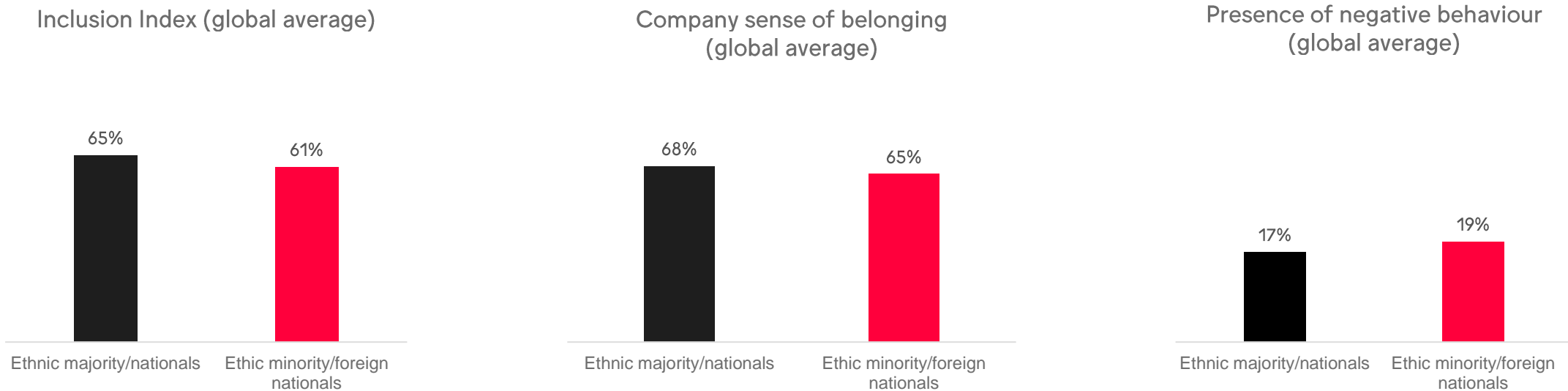
- Each line below represents a different country, demonstrating the very different realities between markets;
- However, calculating average global gender pay gaps for executive manager/C-Suite shows the gender pay gap is 13% in favour of men;
- For other senior staff, the pay gap was 11% in favour of men, for middle managers the figure is 7%, for junior managers it is 1% and for industry starters (interns/trainees/junior execs) is 5%.



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

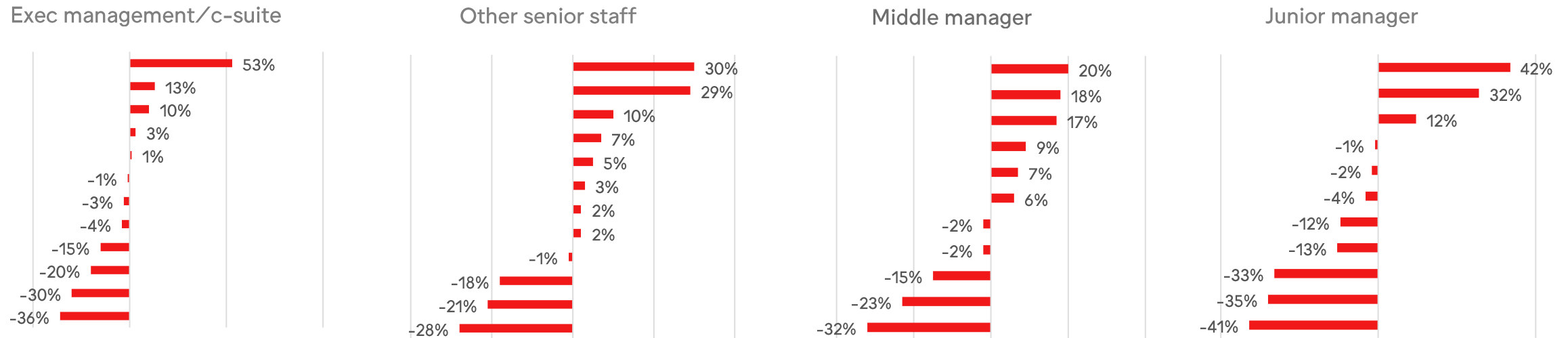
5. The lived experiences of minorities are poorer

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.



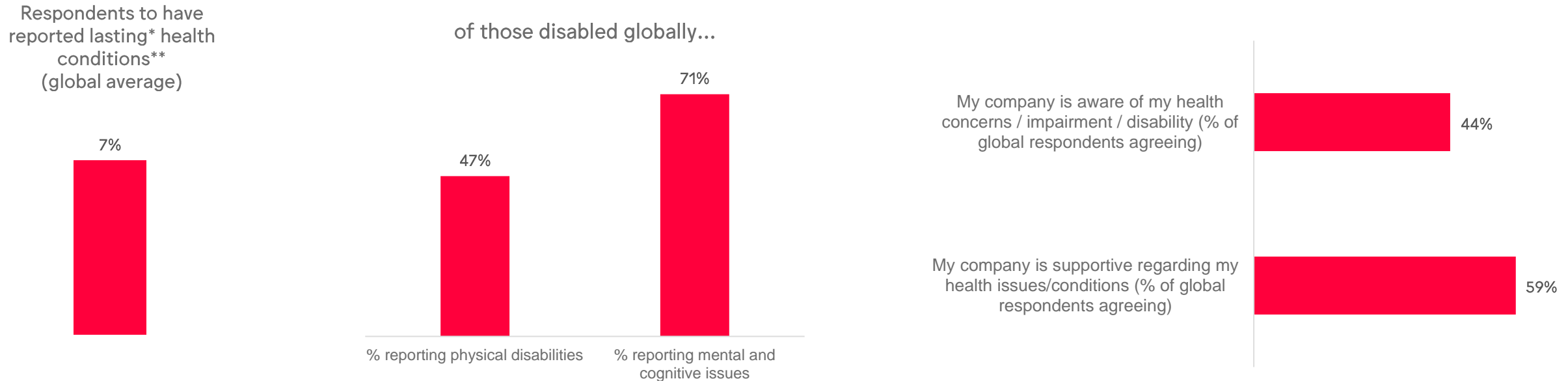
6. There are pay gaps linked to ethnicity but they can represent positive and negative discrimination in equal measure

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.



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

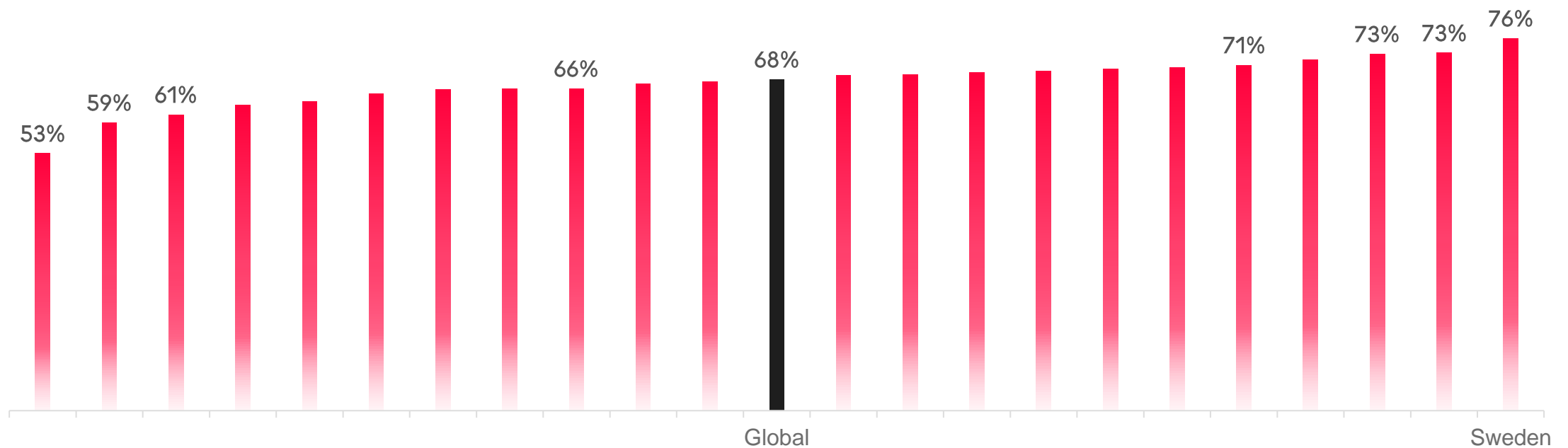


*12 months or more

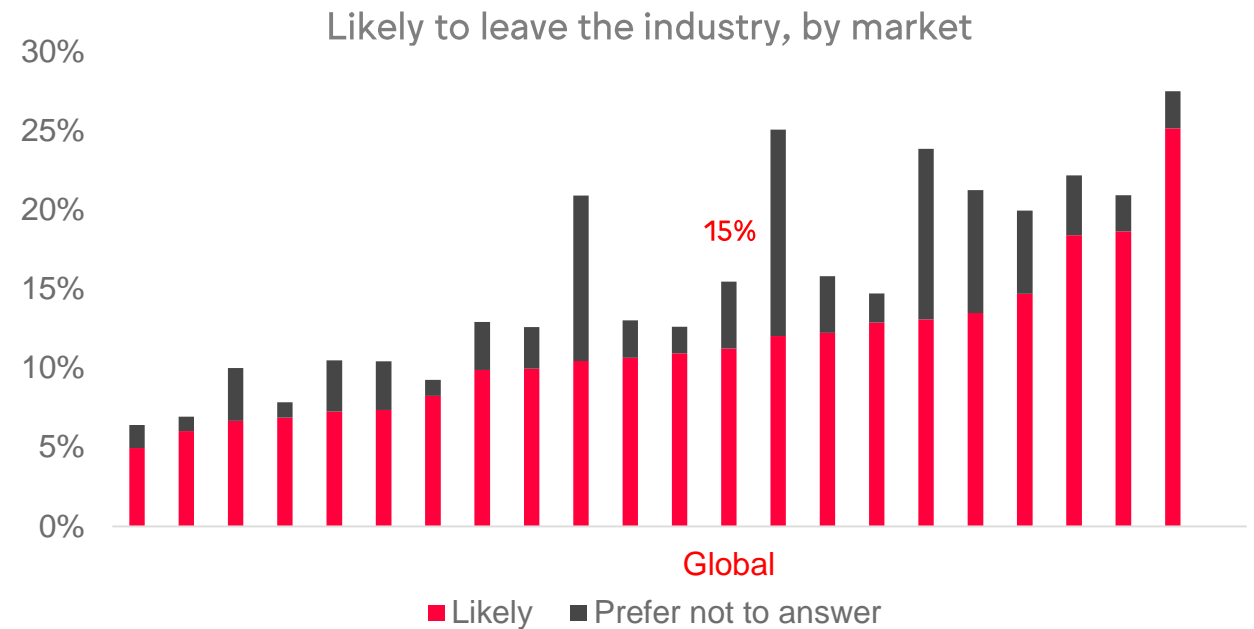
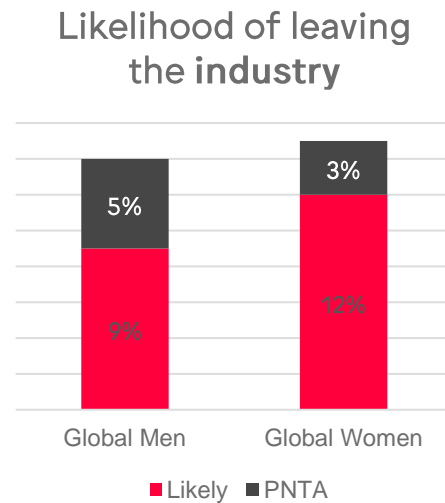
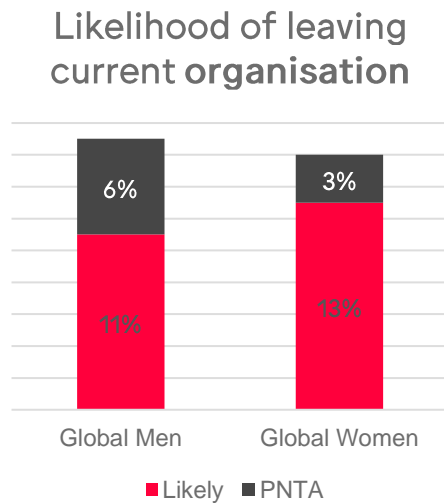
**mobility impairments, fatigue/lack of stamina, breathing capacity, neurodiversity, visual impairments, motor skill impairments, mental health, stress/anxiety, hearing impairments

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



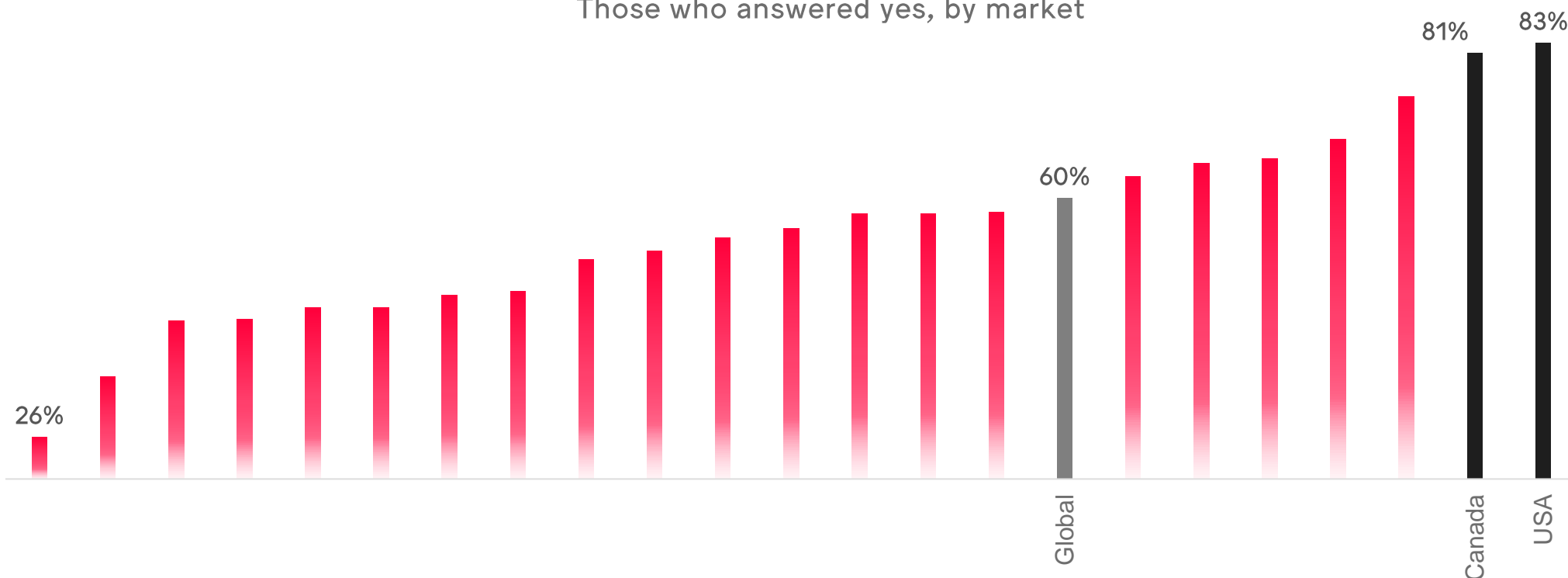
9. 1 in 7 say they would leave their company and the industry on the basis of a lack of diversity and inclusion



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.

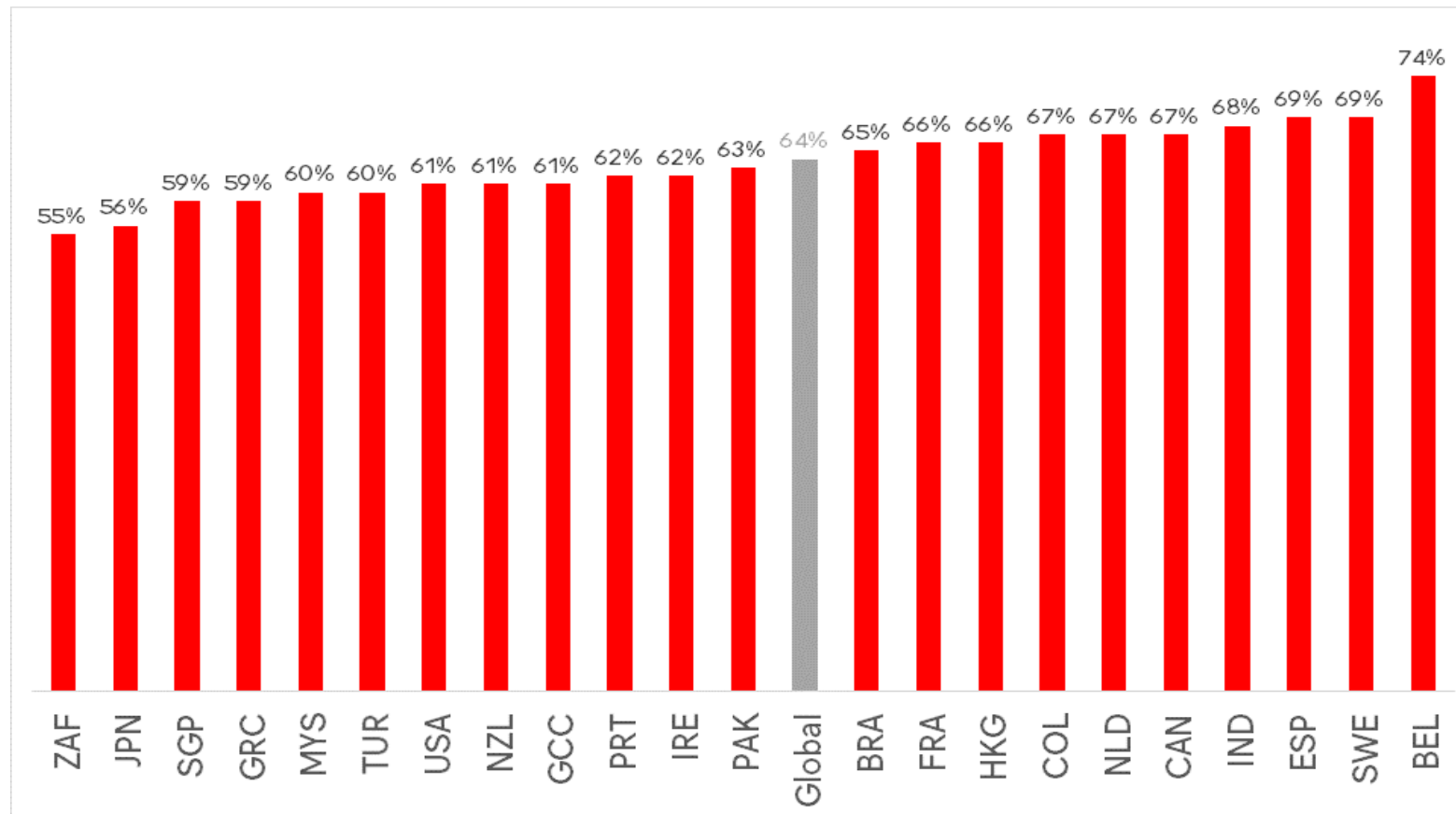
10. Most feel their organisations are taking action to be more diverse and inclusive, but some markets lag significantly

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 is a 19 percentage point range on the overall inclusion score; Belgium scored the highest with 74%



Top 6 take-outs

1. **Stark differences between countries.** 83% Americans said company is taking positive action but only 26% Japanese agreed.
2. **Top forms of discrimination; age and family status** (people with care-giving responsibilities). 40% of women say family status can hinder one's career.
3. **Women and minorities live poorer experiences.** Men score 69% on Kantar's Inclusion Index. Women score 61% as do ethnic minorities / foreign nationals.
4. **High chance of churn.** 1 in 7 say they would consider leaving the industry on the basis of a lack of diversity and inclusion.
5. **Mental health taboo.** Over 5% total respondents report mental health issues. Over half of these don't tell their company. 1 in 3 reported feeling stressed/anxious.
6. **BUT.. marketing industry ahead of other sectors** scoring at 64%- above Health and Pharmaceuticals and Education both at 60%.

What next?

DATE	ACTION
9 December	Detailed trend report and launch event
Q4 2021-Q4 2022	WFA DEI TF review results, identify common areas of action, work on best practice to highlight biggest challenges, feed into local action plans...
Summer 2022	Start planning for Wave II, results to be announced in Cannes 2023



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