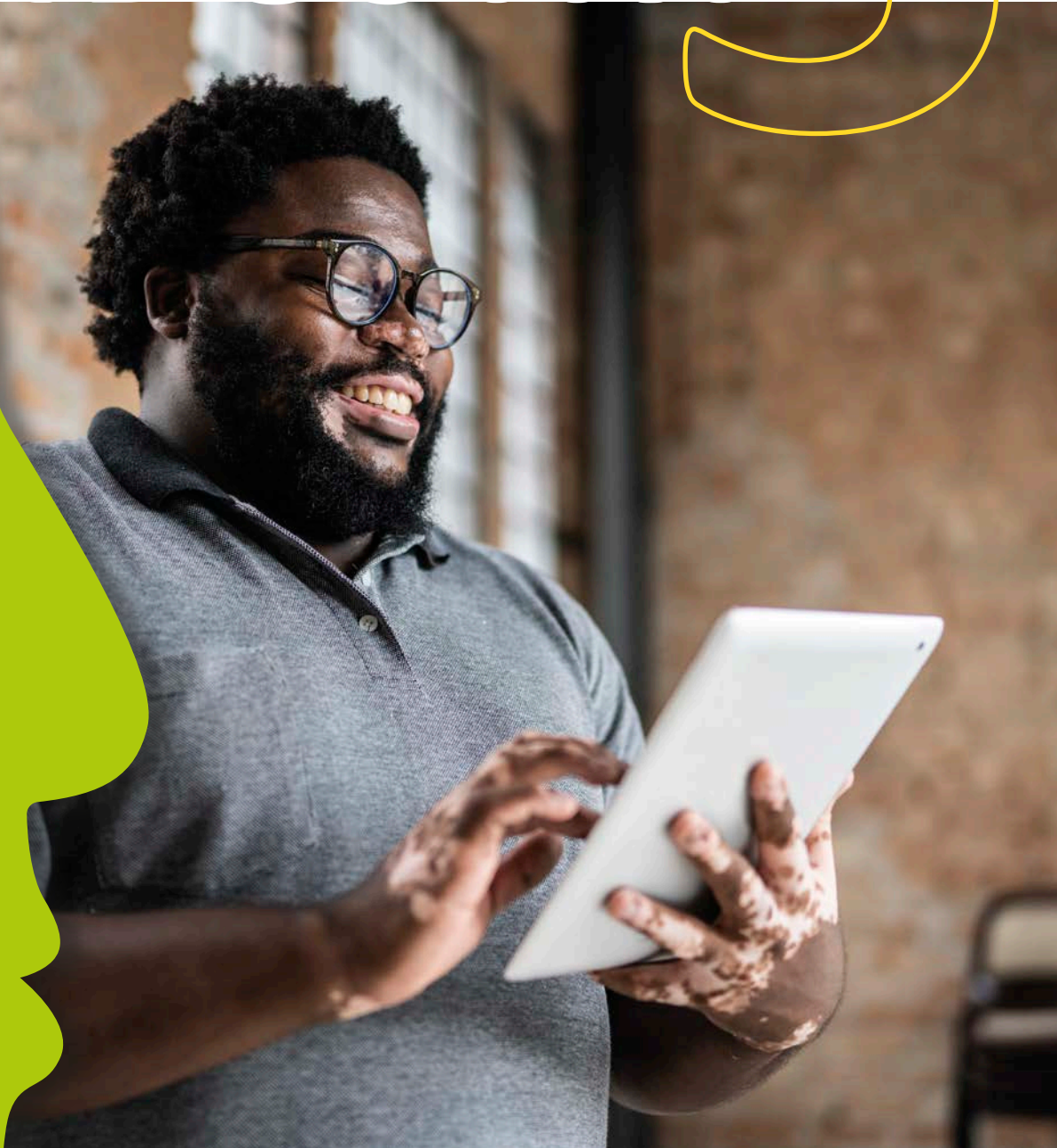
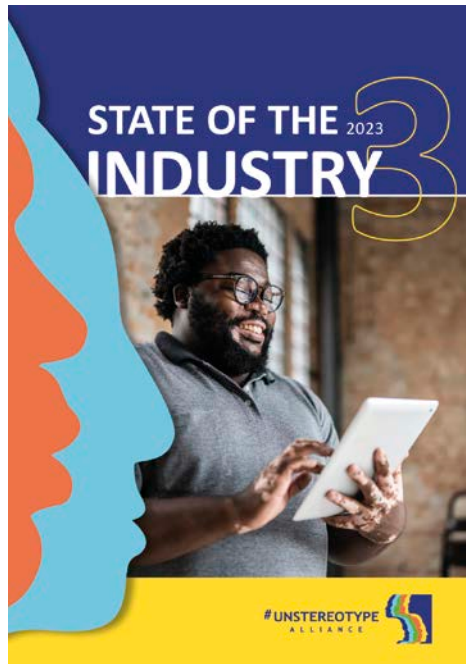


STATE OF THE 2023 INDUSTRY



#UNSTEREOTYPE
ALLIANCE





Acknowledgments

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Terms and definitions

This report makes references to several key terms. Of note is that UN Women uses the following language and terminology for various communities and populations: people of colour, LGBTIQ+, people living with disabilities, older adults, and underrepresented individuals/groups. In some cases, terminology that differs from UN Women’s language and terminology has been used to reflect the terms used in the source cited. In these cases, terminology is either italicized or in quotation marks.

Underrepresented groups: similar to previous State of the Industry editions, underrepresented groups are individuals and/or groups that, currently and throughout history, have experienced various forms of inequality and discrimination, and tend to be underrepresented in advertising and media.¹ Groups mentioned in the report under this classification include, but are not limited to, people of colour, individuals who identify as part of the LGBTIQ+ community, individuals living with disabilities, and others.²

Accessibility: According to the United Nations, means to “enable persons with disabilities to live independently and participate fully in all aspects of life”.³ This includes access to the physical environment, information, technology, communications, and other areas that are inclusive and meet the needs of people living with disabilities.⁴

Diversity: differences that occur among individuals including but not limited to race, ethnicity, nationality, religion, socioeconomic status, education, language, age, gender, sexual orientation, ability, and others.⁵ Diversity can exist in a workplace, with staff from different backgrounds and with different lived experiences.

Equity: unlike equality which refers to all individuals being treated the same, equity recognizes the different barriers that communities experience and promotes fairness by honoring the specific needs of different communities.⁶ In the workplace, this can mean providing tailored support to different communities to ensure that women and other underrepresented groups are able to thrive and advance into leadership roles.

Inclusion: where diversity and difference are embraced, and everyone is respected and valued.⁷

Intersectionality: coined by Kimberlé Crenshaw, intersectionality is “a lens, a prism, for seeing the way in which various forms of inequality often operate together and exacerbate each other. We tend to talk about race inequality as separate from inequality based on gender, class, sexuality, or immigrant status. What’s often missing is how some people are subject to all of these, and the experience is not just the sum of its parts”.⁸

Executive Summary

Fostering workplace equality

The World Federation of Advertisers (WFA) globally,⁹ the Alliance for Inclusive and Multicultural Marketing (AIMM) and Association of National Advertisers (ANA)¹⁰ in the United States (US) and the *IPA Agency Census 2023*¹¹ and the *Creative Industries Census 2023*¹² in the United Kingdom (UK) all examine representation across the advertising industry. Findings from the *WFA Global DEI Census 2023* indicate that women are highly represented at the junior executive/intern/apprentice/trainee level (70% women and 30% men), with the representation between women and men levelling out at the executive management/C-suite level (50% women and 50% men).¹³ Further, findings from the UK and the US show that increasing the number of people of colour in the industry has been slow and incremental. For example, across ANA member CMOs and CMO-equivalents, the representation of African American/Black, Asian, and Hispanic/Latino individuals is 14.6% in 2022 (a small increase from 13.7% in 2021),¹⁴ and the UK *Creative Industries Census 2023* finds that the representation of Asian, Black, Mixed, Arabic or individuals selecting “other” within the creative workforce in the UK is 15.6%, unchanged from the previous year.¹⁵ Representation drops when considering intersectionality. For example, across ANA member CMOs and CMO-equivalents in the US, white women represent 84.9% of positions,

and the percentage of African American/Black women, Asian women, and Hispanic/Latino women is 6.2%, 6% and 3% respectively.¹⁶ While in some cases these are increases from the year prior,¹⁷ overall representation is low. Additional efforts are needed to enhance the representation of non-binary people, people living with disabilities, members of the LGBTIQ+ community, and older adults working in the industry.

Moreover, opportunities exist to increase workplace inclusion and belonging across the advertising industry. Global findings from the WFA indicate persisting experiences of workplace exclusion related to a lack of family-friendly support, skills and knowledge devaluation, workplace stress, and harassment and discrimination.¹⁸ In light of these experiences, and alongside changes in talent motivators and employee expectations, it is crucial for organizations to implement efforts to advance diversity, equity, and inclusion (DEI) internally.

It is recommended that organizations collect both qualitative and quantitative data on representation and experiences, enhance organization-wide understandings of inclusion, embed DEI principles in HR practices, develop family-friendly provisions, and support the next generation of diverse advertisers.

Achieving unstereotyped advertising

Global findings from the Gender Unstereotype Metric (GUM) indicate that women are increasingly being given more screen time, and markets where the Unstereotype Alliance has a presence are more likely to give 50%+ screen time to women.¹⁹ Across ads that show both women and men, women as lead characters in ads remains at 27% (higher than men's representation as leads at 22%), however an intersectional lens considering gender and age reveals that women aged 40 and older are underrepresented.²⁰ There is also a decrease in the representation of people of diverse ethnic origins in lead roles from 42% in 2022 to 31% in 2023.²¹ The report highlights nuances across countries, including Mexico and Türkiye. Opportunities also exist to enhance the representation of members of the LGBTIQ+ community, people with disabilities (3% and 1% respectively according to the GUM)²² and older adults (4% according to the global CreativeX study).²³

Diverse representation in ads is important, and of equal importance is the ways in which people are portrayed. Opportunities exist to reframe notions of masculinity, avoiding monolithic, unchanging narratives,²⁴ as well as avoid stereotypes for all individuals and communities in content. Opportunities also exist to enhance the portrayals of members of the LGBTIQ+ community, people with disabilities and older adults, and avoid common stereotypes.

Organizations are leveraging supplier diversity and resources to enhance diverse representation and progressive portrayals in their ad content. Moreover, advertising self-regulatory bodies are implementing actions for change, and organizations are responding to changing technological landscapes by starting to explore ways to mitigate bias in AI. Recommendations for supporting representation and progressive portrayals include evaluating the screen time and presence of women and underrepresented groups leveraging the Unstereotype Alliance's 3Ps Framework (Presence, Perspective, Personality), developing proper accountability mechanisms for content development and consistent review, developing supplier diversity goals, and mitigating bias given changing landscapes including AI and influencer marketing.

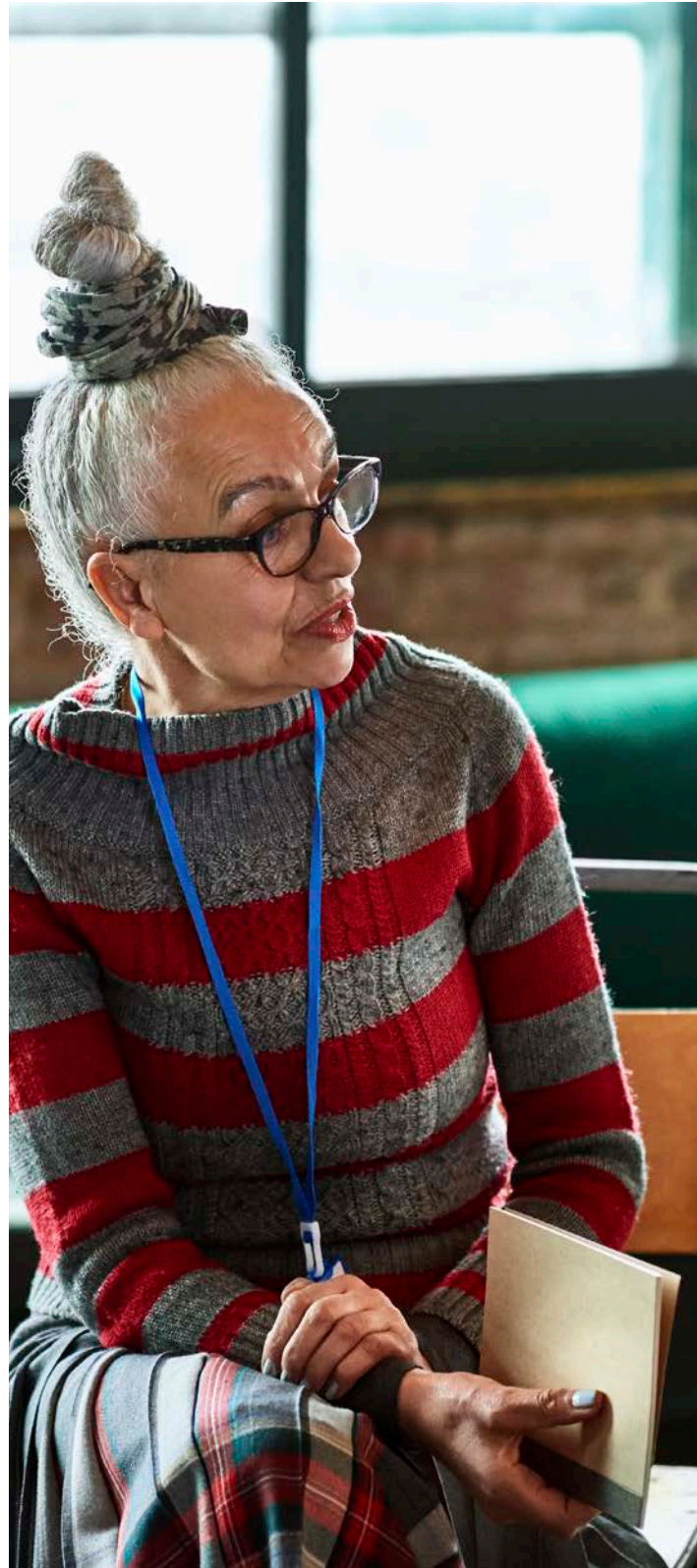


Empowering public action

Global findings highlight the links between consumer trust and brand actions, where 67% of consumers surveyed completely trust or mostly trust brands that tell the truth, 67% trust brands that make honest claims about their social initiatives, and 63% trust brands that act with society's best interests in mind.²⁵ DEI is also an important indicator for consumers – a 2023 US survey highlights that 63% of surveyed consumers indicate that diverse representation in advertising is definitely or somewhat important to them, and 47% of those surveyed indicate that they are likely to buy from a brand that includes diversity in their ads.²⁶ Findings from the International Council of Advertising Self-Regulation (ICAS) indicate that consumers continue to exercise their influence by leveraging advertising self-regulatory bodies to remove harmful ads.

Brands are encouraged to maintain momentum, acting on the commitments and pledges to DEI and supporting communities from years prior. Some are going a step further, embedding DEI holistically into internal and external company efforts. Despite this, it is evident that many brands are shying away from embracing DEI given the fears of criticism and “getting it wrong”. As we approach the 2030 Sustainable Development Goals deadline, now more than ever it is important for brands to build on initial commitments, regardless of fears of criticism. Resources exist to help brands navigate these concerns in thoughtful and authentic ways.

Recommendations for change include committing to DEI goals both in the workplace and the marketplace, increased efforts to support local and underrepresented communities, embedding social purpose within brand values and strategy, continuously learning and improving, and leveraging existing guidance when responding to criticism.



Introduction

The State of the Industry report is a yearly publication that provides a snapshot of progress towards Diversity, Equity and Inclusion (DEI) objectives across the global advertising

industry, including an assessment of diverse representation and unstereotyped portrayals in content, along three themes:

- **FOSTERING WORKPLACE EQUALITY:** whether brands and organizations within the industry have diverse representation internally across all levels including leadership, and whether individuals are included, respected, and valued.
- **ACHIEVING UNSTEREOTYPED ADVERTISING:** analyzing representation within ad content and whether individuals are portrayed in progressive and unstereotyped ways.
- **EMPOWERING PUBLIC ACTION:** the role of brands and organizations to credibly stand in line with their stated values and engage consumers by acting, speaking and advocating for positive social change, such as speaking out against social injustice, and fostering DEI.

The State of the Industry Report 2023 comes at a pivotal time. We have reached the halfway point of the 2030 Sustainable Development Goals timeline and, while some progress has been made towards Sustainable Development Goal (SDG) 5 on Gender Equality, progress is slow and we are not on track to achieve gender equality globally by 2030.²⁷ In terms of SDG 10 on Reduced Inequalities, reports indicate that we have a long way to go – globally, one in six people experience discrimination based on any grounds.²⁸ Furthermore, there is a persistent need to recognize intersectionality and support women of all backgrounds, as well as take action to support all forms of diversity,

namely individuals of diverse racial and ethnic backgrounds, people with disabilities, members of the LGBTIQ+ community, and older adults. The advertising and media industry plays a powerful role in shaping our everyday perceptions and expectations and is therefore a critical lever for change within broader, global efforts towards Sustainable Development Goals and DEI goals.

This report highlights that while some progress has been made to support DEI across the advertising industry, in many cases this progress has been slow and minimal. For example,

sources studied in the United States (US)²⁹ and the United Kingdom (UK)³⁰ show the representation of people of colour working in advertising has increased very marginally by only a few percentage points, or remained unchanged. Further, greater efforts are needed to enhance the number of non-binary people, people living with disabilities, members of the LGBTIQ+ community, and older adults working in the industry. Coupled with the lag in diverse representation, findings from the WFA's *Global DEI Census 2023* indicate that the industry is falling short in fostering workplace inclusion for women, individuals of different ethnic and racial groups, members of the LGBTIQ+ community, and people with disabilities.³¹

Within advertising content itself, global findings from the Gender Unstereotype Metric (GUM) indicate that 72% of women featured in ads studied globally hold 50% or more of screen time.³² However, disparities still exist in the authentic and unsteretyped portrayal of individuals of different genders – there is a need to reframe notions of masculinity, ensuring that the portrayals of men and boys are multi-layered rather than monolithic.³³ Further, increased efforts are needed to improve the representation of individuals of diverse ethnicities, races, people with disabilities, the LGBTIQ+ community, older adults, and people with different body types.

Finally, the report underscores consumer expectations of diverse representation in ads, and consumer trust in brands that act in favour of the good of society. As such, maintaining momentum to deliver on the many pledges and commitments that arose in 2020³⁴ to support diverse communities, particularly in the face of changing priorities and criticism from consumers, is of the utmost importance.

Accountability is critical. The Unstereotype Alliance continues to promote change across the global advertising industry, welcoming new members and launching frameworks and tools for transparency and accountability. To be launched in the spring of 2024, the Unstereotype Alliance's Charter of Accountability will provide a framework to ensure progress is measured and tracked across the membership, including a mechanism for members to develop benchmarks and share their impact, and to report back to UN Women on progress. This, in turn, is formally reported against UN Women's Strategic Plan 2022-25.³⁵

Ultimately, updated findings indicate that while progress has been made in some areas, additional, intentional efforts are needed to enhance DEI efforts and reporting at an increased pace that aligns with the 2030 Sustainable Development Goals.





1

FOSTERING WORKPLACE EQUALITY

Representation in the workplace

Representation is evaluated using global findings from the World Federation of Advertisers (WFA), US findings from the Alliance for Inclusive and Multicultural Marketing (AIMM) and Association of National Advertisers (ANA), and findings from the *IPA Agency Census 2023* and the *Creative Industries Census 2023* in the UK. Findings indicate that women and people of colour are highly represented in entry level roles. Additionally, there is a need to increase the number of non-binary people, people living with disabilities, members of the LGBTIQ+ community, and older adults working in the industry.

The AIMM has released data on representation across ANA members in three categories: ANA Board of Directors and Select Member Companies Diversity Benchmark,³⁶ ANA Overall Membership,³⁷ and ANA Member CMOs.³⁸ Findings suggest great strides towards the representation of women across all levels of the companies analysed.³⁹ The ANA Board of Directors and Select Member Companies Diversity Benchmark highlights that, across the marketing departments of participating ANA member companies, women comprise 67.5% (compared to 63.8% in 2021).⁴⁰ Across ANA

member companies, women comprise 68.3% in 2022 (an increase from 67.1% in 2021).⁴¹ Across ANA member CMOs and CMO-equivalents, women comprise 57.3% of the top marketer positions in 2022 (up from 54.6% in 2021).⁴² Despite these positive shifts, the ANA Board of Directors and Select Member Companies Diversity Benchmark indicates that the representation of non-binary individuals remains unchanged from 2021 to 2022 (at 0.1%), and non-binary individuals also represent 0.1% of people across ANA membership.⁴³ A similar gender representation pattern exists in the UK Findings from the *UK Creative Industries Census 2023*, surveying 3,301 professionals across the Creative Industries (digital, marketing, and creative) indicate that women represent 63% of those surveyed (unchanged from 2022).⁴⁴

Across the varying ANA levels of analysis, changes in the representation of individuals of different races and ethnicities has been incremental. The ANA Board of Directors and Select Member Companies Diversity Benchmark highlights that African American/Black, American Indian/Alaskan Native, Asian, Hispanic/Latino, Native Hawaiian/Pacific Islander, multiracial, and individuals who specified their ethnicity as “other” has increased slightly from 30.8% in 2021 to 32.3% in 2022.⁴⁵ Across ANA member companies representation has increased slightly, from 27.2% in 2021 to 29.1% in 2022.⁴⁶ Across ANA member CMOs and CMO-equivalents, the representation of African American/Black, Asian, and Hispanic/Latino individuals has also increased slightly, from 13.7% in 2021 to 14.6% in 2022.⁴⁷ Large variations exist across different racial and ethnic groups – for example, across ANA Board of Directors and Select Member Companies, Hispanic/Latino individuals represent 10.9% (the highest), while Native Hawaiian/Pacific Islander individuals represent 0.3% (the lowest).⁴⁸ The *UK Creative Industries Census 2023* also finds that the

representation of Asian, Black, Mixed, Arabic or individuals selecting “other” within the creative workforce in the UK remains unchanged, at 15.6%.⁴⁹

When considering intersectionality, the percentage of women across ANA overall membership who identify as African American/Black, American Indian/Alaskan Native, Asian, Hispanic/Latino, Native Hawaiian/Pacific Islander, or another group including multiracial individuals has risen from 25.8% in 2021 to 28.2% in 2022.⁵⁰ Asian women have the highest representation (9.6%) and American Indian/Alaskan Native women have the lowest (0.1%).⁵¹ Across ANA member CMOs and CMO-equivalents, the percentage of African American/Black women has nearly doubled, from 3.3% to 6.2%, and the representation of Asian women has risen slightly from 5.6% to 6%.⁵² Conversely, the representation of Hispanic/Latino women has fallen, from 4.7% to 3%.⁵³ Ultimately we see slight increases and decreases in representation, however on the whole, intersectional representation remains low.⁵⁴

The representation of individuals of different sexual orientations has also increased, albeit incrementally. The percentage of gay and lesbian individuals across the marketing departments of participating ANA member companies has increased from 4% in 2021 to 4.4% in 2022.⁵⁵ The percentage of bisexual individuals has risen from 1.2% to 2%, and the percentage of Anthrosexual, Asexual, Demisexual, Pansexual, and Transsexual has risen 0.1% to 1%.⁵⁶ UK findings are more promising – the *LGBTQIA+* community comprises 18% of individuals surveyed in the creative industries workforce, a 4% increase from the previous year.⁵⁷

According to the *UK Creative Industries Census 2023* finds that just over 1 in 10 respondents are aged 45 and older.⁵⁸

Representation at the leadership level

Global findings from the *WFA 2023 Global DEI Census* highlight patterns in the representation of women and men from entry level roles all the way up to senior leadership. The Census surveyed nearly 13,000 respondents across 91 countries and found that women are highly represented at the junior executive/intern/apprentice/trainee level (70% women and 30% men), with the gap between men and women closing at the executive management/C-suite level (50% women and 50% men).⁵⁹

Nuances exist between countries. The *IPA Agency Census*, including data from 152 agencies,⁶⁰ finds that the representation of women in C-suite roles has increased marginally, from 37.5% in 2022 to 37.9% in 2023 across IPA member agencies.⁶¹ Within creative and non-media agencies, women occupy 38% of C-suite roles, up again slightly from 36.3% in 2022.⁶² Within their media agency counterparts, women occupy 37.7% of C-suite roles, down slightly from 39% in 2022.⁶³

In the US, the ANA Board of Directors and Select Member Companies Diversity Benchmark highlights that, across the marketing departments of participating ANA member companies, women are mostly represented in admin and clerical support roles (84.5% women vs. 15.4% men and 0.1% non-binary individuals).⁶⁴ This gap closes higher up the leadership ranks (55.6% of women at the senior level, 44.2% men, and 0.2% non-binary people).⁶⁵

According to the ANA Board of Directors and Select Member Companies Diversity Benchmark, African American/Black, American Indian/Alaskan Native, Asian, Hispanic/Latino, Native Hawaiian/Pacific Islander, Multiracial individuals and those selecting “other” represent 41.3% of admin/clerical support roles and 27.4% of senior level roles.⁶⁶ *UK Creative Industries Census 2023* findings are similar – 11% of Black, Asian, and “ethnic minority” individuals hold roles that earn £70,000 and above.⁶⁷



Persisting pay gaps in the UK

Changes in pay gaps across the UK vary, however whether it is a slight increase or slight decrease, pay gaps persist across the industry.

The *IPA Agency Census* finds that, among those member agencies providing salary breakdowns by gender and seniority, a pay gap of 15.2% in favour of men exists (although down from 17.4% in 2022).⁶⁸ The gender pay gap is higher in creative and other non-media agencies, at 20.5% (down from 21.1% in 2022) compared to media agencies (8.6%, down from 14.3% in 2022).⁶⁹

According to the *UK Creative Industries Census 2023*, women out-earn men in entry and mid-level roles, however this changes as women advance into senior level and C-suite roles (19% of women earn more than £70,000 compared to 36% of men).⁷⁰ Differences exist between permanent and freelance roles – the survey finds that, compared to last year, the pay gap across permanent roles has increased, whereas across freelancer roles the gap has decreased.⁷¹

White, Black, and mixed-race permanent employees experienced a 7.3%, 9.6%, and 1.5% salary increase respectively, while Asian individuals and Arab/“other” individuals experienced a 3.7% and 9.6% decrease respectively.⁷² Increases have also been seen across all groups of freelancers, with the exception of Black individuals, who experienced no increase, and mixed-race individuals, who experienced a 1.2% decrease.⁷³ In terms of intersectionality, the Census shows that white men (whether permanent or freelance) make the most, with Black women making the least across permanent positions, and Asian women making the least across freelance positions.⁷⁴

Further, the *LGBTQIA+* community earns 8.5% less than heterosexual individuals (vs. 5% less the year prior), and people with disabilities earn 9% less in annual salaries and 7% less in day rates than individuals without disabilities.⁷⁵

Changing expectations: more than just pay

In order to attract and retain talent, and ultimately foster workplaces that support individuals, companies in the marketing and advertising industry must remain aware of the considerations that prospective employees value, and the desires and needs of current employees.

Broadly, Deloitte's *2023 Gen Z and Millennials Survey* highlights talent motivators across 22,856 (14,483 "Gen Zs" and 8,373 "Millennials") individuals across 44 countries.⁷⁶ The survey finds that 39% of "Gen Z" and 34% of "Millennials" surveyed have rejected employers whose values do not align with their own, and 77% of "Gen Z" and 75% of "Millennials" currently working remote or hybrid roles would consider looking for a new job if their employer asked them to work in-person full time.⁷⁷

Within the advertising industry in particular, the *UK Creative Industries Census 2023* finds that among those surveyed, the top priorities included: holiday allowance (91%), flexible working hours (87%), pension (82%), progressive policies (77%), learning and development (74%), and parental leave (51%), among others.⁷⁸ The Census further finds that over 90% of women respondents aged 35 and older indicated that flexibility was important to them.⁷⁹ As companies aim to increase representation and workplace inclusion, they must consider the factors that are important to employees across the industry that can be coupled with fair wages, and strive to ensure that employee needs are met.

Fostering workplace inclusion

Diverse representation within the industry is the first step, however it is not where efforts should end. To attain the benefits of having a diverse workforce, companies must ensure that every individual feels welcomed, respected, and valued. To better understand experiences of inclusion and belonging across the industry globally, the *WFA Global DEI Census 2023* is used. This is coupled with UK-specific findings from the *All In Census* from IPA, ISBA, and Kantar, surveying over 18,500 marketing professionals in 2023.⁸⁰

According to the WFA, one in seven individuals indicate that they would leave the industry due to a lack of diversity, equity, and inclusion.⁸¹ This metric is one in six for women and members of the *LGBQ+* community, one in five for

"ethnic minorities", and one in four for people with disabilities.⁸² Employees are optimistic about efforts – 72% of surveyed respondents believe that their company is actively taking steps to be more diverse and inclusive, with the highest perceptions in Canada and the US (87% each) and the lowest in Japan (49%).⁸³

Despite the emphasis employees put on inclusion in the workplace, as well as company efforts to be more diverse and inclusive, common forms of workplace exclusion occur globally across the industry. These include a lack of support for individuals with familial responsibilities, the devaluation of people's skills and knowledge, workplace stress, and forms of harassment and discrimination.

Family-friendly support

42% of parents surveyed in the WFA's *Global DEI Census 2023* indicated that family responsibilities hinder one's career.⁸⁴ 36% of women surveyed who have taken parental leave in the last five years say this has disadvantaged their career, compared to 8% of men.⁸⁵ Similarly, the *All In Census* finds that 55% of women believe parental leave has negatively impacted their career progression.⁸⁶ This, compared to the 6% of men who stated the same,⁸⁷ highlights that while all parents may experience barriers to career progression given familial responsibilities, the barriers experienced by women tend to be greater.

Skill and knowledge devaluation

Women, individuals from "ethnic minority" groups, and people with disabilities continue to report skills devaluation and belittlement in the industry. WFA indicates that 39% of people with disabilities, 30% of women, and 30% of "ethnic minority" individuals reported being unfairly spoken over.⁸⁸ 42% of people with disabilities, 33% of "ethnic minority" individuals, and 31% of women reported feeling undervalued compared to colleagues of equal competence.⁸⁹

Workplace stress

Individuals noted mental health stressors due to work environments. 27% indicated that work is having a "negative physical impact on health and mental health".⁹⁰ 42% indicated they are often very stressed at work.⁹¹ The *All In Census* finds that 22% of people with disabilities experience work-related stress compared to the 14% industry average.⁹² Positive efforts do exist – WFA findings show that 50% agree that their workplace is open about mental health.⁹³

Harassment and discrimination

Bullying, harassment, and discrimination of various forms persist. The WFA finds that 27% of people with disabilities surveyed reported being bullied, undermined, or harassed.⁹⁴ 32% indicate that age can hinder one's career.⁹⁵ Only 33% of women agree that their company provides individuals equal pay for equal work.⁹⁶ 28% of surveyed *LGBQ+* individuals reported feeling uncomfortable in the workplace in the last 12 months.⁹⁷ The *All In Census* finds that 30% of Black, 21% of Asian, and 21% of other "ethnic minority" individuals report they are likely to leave the industry due to a lack of inclusion or being discriminated against (compared to 7% of white individuals).⁹⁸ These numbers are a decrease from 2021, however still indicate that discrimination and exclusion persist.⁹⁹



Actions for change

Setting the tone: broad commitments

Companies across the global advertising industry are setting the tone and increasing their commitment to gender equality, particularly by signing up to the Women's Empowerment Principles (WEPs). The WEPs are a set of principles that offer guidance and resources to businesses on promoting gender equality in the workplace, marketplace, and community.¹⁰⁰ As of 31 December 2023, among companies that specified their sector as "advertising" upon sign-on, 352 companies globally have signed the WEPs (up from 288 signatories as of October 2022). Across countries where the Unstereotype Alliance has a national chapter, 168 companies specifying their sector as "advertising" are WEPs signatories (up from 137 signatories as of October 2022). At the time of sign-on, 32 companies specifying their sector as "advertising" across countries where the Unstereotype Alliance has a national chapter had a gender action plan to demonstrate their concrete commitment to gender equality in the world of work (up from 22 in October 2022).

Individual company actions

In addition to industry-wide pledges, organizations are implementing tailored solutions to enhance representation and inclusion among advertising and marketing staff. Efforts include target setting, supporting the next generation of creatives, and resource development. These examples may serve as inspiration for other organizations to implement similar initiatives in their organizations.

Efforts exist to support the next generation of individuals working in the industry. Building on existing work from Unstereotype Alliance chapters in South Africa, Brazil, and the United Arab Emirates, the **Unstereotype Alliance** is developing an initiative to enhance this professional pipeline by educating young creatives in the workplace on unstereotyped practices, as well as marketing, communication, and creative students who will likely join the industry. This initiative will leverage the work that **The Loeries** is currently doing to support youth in the industry via their Youth Committee Mentorship Program.¹⁰¹ The committee comprises youth across Africa and the Middle East provides a platform for networking and skills development.¹⁰²

In 2023, **Unilever** launched the 'Believe in Talent' campaign, which encompasses initiatives to increase the number of individuals with disabilities in the advertising production process.¹⁰³ These initiatives include:

- The Inclusive Set Commitment, pledging to ensure that at least one person with a disability is part of the production crew for all productions over €100k.¹⁰⁴
- An open-source Inclusive Production Toolkit, developed alongside Bus Stop Films and Taste Creative, with practices to support people with disabilities in the production process.¹⁰⁵

Some organizations are receiving recognition for their efforts to support DEI in the workplace. In 2023, **IPG** was named one of the best employers for diversity by Forbes and Statista.¹⁰⁶ Winners are determined based on responses about diversity from a survey of around 45,000 US employees.¹⁰⁷

Progress from 2021: #ChangeTheFaceCampaign

The First State of the Industry Report spotlighted Vodafone's #ChangeTheFace campaign aimed at breaking down biases in the technology space.¹⁰⁸ The 2021 campaign focused on unstereotyped advertising, and Change the Face has maintained momentum, looking inward to understand the experiences of neurodivergent individuals in the workforce.¹⁰⁹ The campaign brings together Alliance member Vodafone, and other companies to engage focus groups and conduct surveys with over 2,000 neurodivergent individuals around the world to understand experiences in the workforce, inclusion in the workplace, and recommendations for change.¹¹⁰

Accountability for efforts to increase diverse representation and inclusion throughout the global advertising industry is crucial. To be launched in the Spring of 2024, the Unstereotype Alliance will launch its Charter of Accountability to measure progress across the membership. Several key performance indicators will be monitored, including diverse representation in

the workforce, the use of progressive content metrics, and engaging employees with Unstereotype principles and training, among others. Unstereotype Alliance members will report their progress annually, which will in turn be reported as part of UN Women's Strategic Plan to achieve gender equality.



Recommendations

- Collect quantitative data on representation and pay gaps at all levels, from entry up to C-suite and board levels
 - Given changing landscapes, demographics, and language/terminology, data collection and methods should be continuously reviewed to ensure that organizations are gathering information on individuals in all their diversity and using appropriate and ethical means
- Couple quantitative data collection with qualitative, experience and perception-based data to understand levels of inclusion and belonging
 - Use data to further understand talent motivators to understand why people join the sector or organization, why they want to stay, and why they would consider leaving. Leverage this information to enhance employee experiences.
- Enhance organization-wide awareness on microaggressions and strategies to encourage inclusion within daily interactions
- Embed DEI principles within all HR processes including outreach, recruitment, hiring, retention, promotion, and retirement/exit
- Develop and/or enhance family-friendly policies to ensure that all parents and individuals with caregiving responsibilities are supported
 - This includes return-to-work support after individuals take time off for parental and caregiving responsibilities
- Provide continuous learning opportunities and professional development, mentorship, and sponsorship opportunities to ensure pathways to leadership for women and underrepresented groups
- Organizations can support the next generation of advertisers and influencers by ensuring inclusive work opportunities and educating the next generation on the importance and impact of unstereotyped advertising.



2

ACHIEVING UNSTEREOTYPED ADVERTISING

Efforts to increase the representation of individuals in all their diversity and ensure that portrayals are unsteretyped, empowered, and progressive is ongoing. The Unstereotype Alliance's 3Ps framework continues to encourage brands to monitor presence, perspective, and personality of individuals in ads.¹¹¹ The framework also works in conjunction with the Gender Unstereotype Metric (GUM) which measures the presence of men and women in ads to determine stereotyped portrayals,

and the recently published complementary Progressive Unstereotype Metric (PUM) which measures whether portrayals are progressive and specifically considers race, ethnicity, age and disability.¹¹² The launch of the updated metric, coupled with representation and progressive portrayal gaps across the industry, highlights the ongoing need for organizations and brands to critically evaluate their content on an ongoing basis.

Diversity of presence

Gender

The GUM, analyzing over 22,000 ads across more than 7,600 brands (including Unstereotype Alliance members and other brands) and 72 countries, finds slight changes in gender representation.¹¹³ Women are increasingly given more screen time year after year from 2019 to 2023 (currently, 72% of women in ads studied hold 50% or more of screen time).¹¹⁴ Screen time for women is high in Argentina, India, Pakistan, Peru and Saudi Arabia, and low in the Czech Republic, France, Italy, and the Netherlands.¹¹⁵ Markets with Unstereotype Alliance presence are more likely to give 50%+ screen time to women and show men and women with diverse body sizes compared to non-Alliance members.¹¹⁶

Across ads that show both men and women, women's prominence in ads (whether they are leads in ads) across GUM markets has stayed the same from 2022 to 2023 (at 27%), and the percentage of women with speaking lines has increased slightly (from 39% in 2022 to 40% in 2023).¹¹⁷ When considering gender and age, representation skews younger.¹¹⁸ Women and men under 40 are overrepresented, a similar pattern to previous years (75% of women and 67% of men in ads studied are under the age of 40).¹¹⁹ Additionally, the representation of women and men with diverse body types remains low, at 16% for women and 15% for men.¹²⁰

Nuances exist between countries. The first State of the Industry report (2021) explored gender representation across Effie award winning and finalist TV entries in Türkiye to better understand representation in Turkish advertising.¹²¹ Updated 2022 research of 228 TV ads (51% are Effie winner TV ads, and finalist TV ads make up 49%) highlight that women

leads represent 43% in 2022 Effie winner and finalist TV ads.¹²² Only 5% of women leads are shown with "large" body types.¹²³ A survey by the Geena Davis Institute on Gender in Media for UNICEF, analyzing 1,542 characters across 400 advertisements that aired in 2019 and 2021 in Mexico, found relatively equal representation between women and men, however areas for improving diverse gender representation exist – non-binary individuals represent less than 1% of characters.¹²⁴ Characters with "larger" body types are underrepresented (1.6% of women and 1.9% of men).¹²⁵

Race and ethnicity

GUM findings indicate that the representation of individuals from diverse ethnic origins across markets studied remains low, at 17% (down from 18% in 2022).¹²⁶ Ethnic origin diversity is most prominent in Australia, Canada, the Netherlands, the UK and the US.¹²⁷ The portrayal of people of diverse ethnic origins in lead roles across GUM markets has decreased, from 42% in 2022 to 31% in 2023.¹²⁸ The diversity of people of different skin colours and tones across GUM markets also remains low at 29% (a slight increase from 28% in 2022).¹²⁹ Like ethnic diversity, individuals of diverse skin tones in lead roles have decreased, from 42% to 32%.¹³⁰ Ads in markets with Unstereotype Alliance presence are more likely to feature ethnic origin diversity and skin colour diversity than non-Unstereotype Alliance members.¹³¹

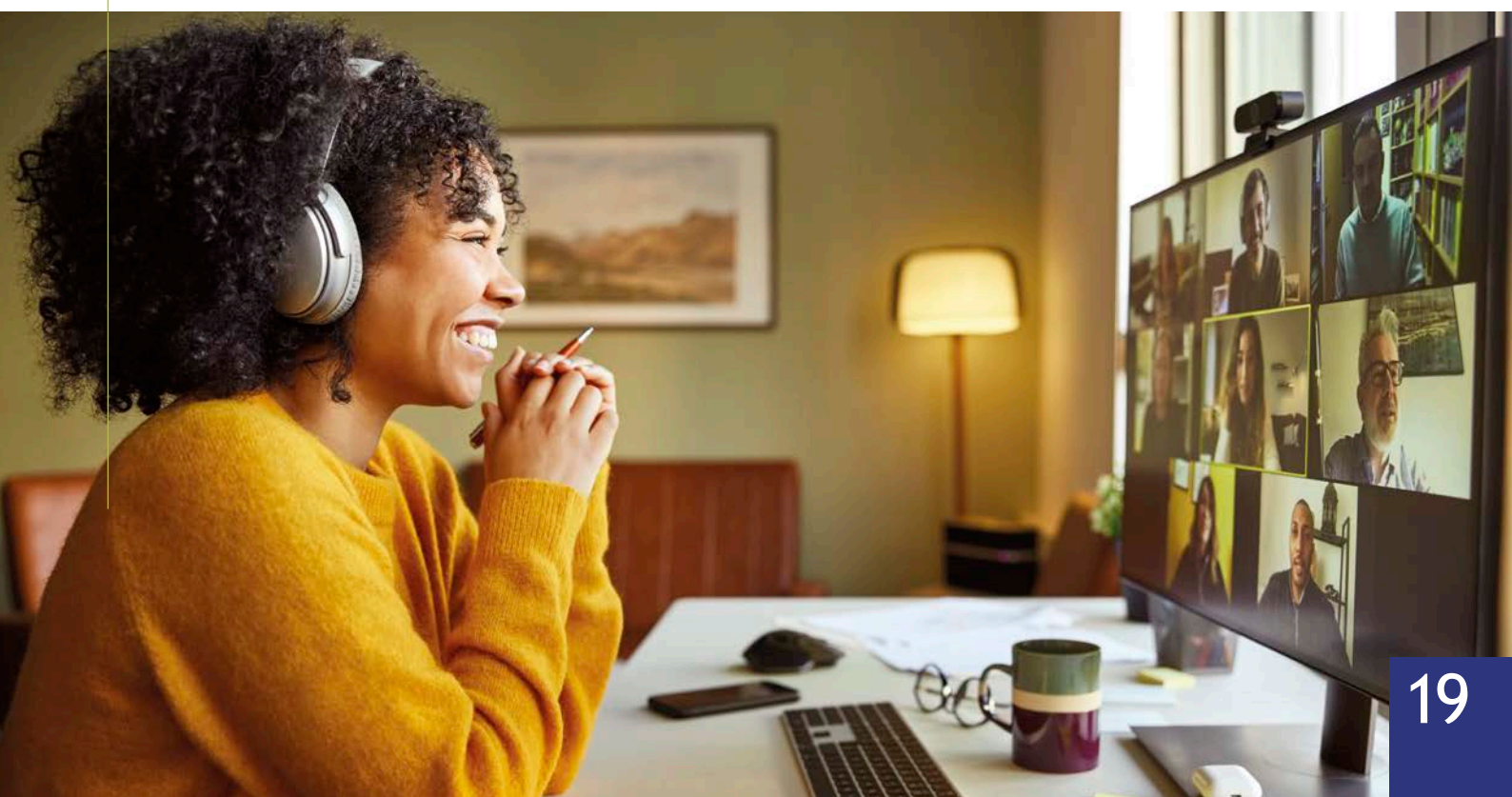
In Mexico, differences exist in terms of the presence of individuals of different skin tones. Among both men and women, most individuals shown have light and medium-light skin tones, with fewer individuals of medium and medium-dark skin tones.¹³² People with dark skin tones represented less than 1% of men and women across ads studied.¹³³

Findings from the *Representa* study conducted by the Unstereotype Alliance Brazil National Chapter analyzing representation in Brazil's advertising industry highlight similar racial disparities.¹³⁴ The study sample covers 5,338 TV insertions from 247 advertisers across 36 markets, 440 unique films and 2,064 social media posts from 190 brands.¹³⁵ The findings indicate that on social media, among ads with

male main characters, 74% show white people, compared to 21% Black characters and 5% with ethnic diversity.¹³⁶ Intersectional disparities exist – among the ads with female main characters, 62% are white, 28% are Black and 10% are “ethnically diverse”.¹³⁷ These disparities also exist across TV commercials, where white women outnumber Black women at a 4:1 ratio.¹³⁸

Progress among Unstereotype Alliance Member: MARS

In June 2023, MARS introduced the findings from a Geena Davis Institute on Gender in Media commissioned analysis of all ads aired in 2022 globally.¹³⁹ Findings indicate that MARS has made significant improvement in gender representation and the representation of individuals of different races and ethnicities.¹⁴⁰ Women now represent 49.9% of individuals in MARS ads – a 51% increase since the previous assessment, and people of colour represent 63% of individuals shown in ads – a 117% increase since 2018.¹⁴¹ The analysis reveals that efforts are still needed to increase other forms of representation, namely disability and age.¹⁴²



Progressive portrayals

Representation alone is not enough – brands and organizations must also consider how people are portrayed – in what ways and occupying what roles. GUM findings show that markets with Unstereotype Alliance presence are more likely to show men and women in non-traditional roles than markets without an Unstereotype Alliance presence.¹⁴³ Further, findings indicate that advertising that “drives a positive image of female characters and sets a good example for others” are often those where women are the most prominent, and where they are shown as confident and caring.¹⁴⁴ For men, this includes ads where men and women are shown equally and where men are shown as caring.¹⁴⁵

Portrayals vary between countries. Findings from the *Effie Awards Türkiye Gender Equality Report 2022* indicate that 34% of the women leads are portrayed as having a working role, an increase from 29% on average between 2019 and 2021.¹⁴⁶ 18% of women leads are shown outside the home doing paid work, which remained unchanged compared to the average between 2019 and 2021.¹⁴⁷ Conversely, 14% of women leads are shown in a homemaker role (portrayed as doing laundry, ironing, cleaning, cooking, preparing table, serving guests, etc.) compared to 15% on average between 2019 and 2021.¹⁴⁸ Overall, women leads continued to be portrayed mostly as career women (21%) and authority figures (13%), followed by housewives (13%).¹⁴⁹

Findings from the Geena Davis Institute on Gender in Media for UNICEF indicate that in Mexico, men are more often shown working, with a paid job, and at an office, while women are more often shown in the home, parenting, and/or performing domestic tasks.¹⁵⁰ Compared to men, women are less represented across all types of jobs, including business, sales, and law; medical professions; service, retail, or manual labour work; art or entertainment; military or law enforcement; or other types of paid jobs.¹⁵¹ Further, women are objectified more in ads, and are more often shown in revealing clothing compared to men.¹⁵²

In Argentina, the 2023 results of the *Disarming Stereotypes* study, conducted in collaboration with #MEP (Mujeres en Publicidad) and supported by the Argentine Chamber of Advertisers (CAA) and Diageo, reveal that traditional gender roles persist in 27 award-winning audiovisual pieces from the country’s top four festivals.¹⁵³ Across the pieces studied, nine out of ten perpetuate traditional gender roles.¹⁵⁴ Women are portrayed as experts in sectors like home care, personal care and food.¹⁵⁵ Men are portrayed as experts in business and leisure, with banking being the only category where women and men are shown equally as experts.¹⁵⁶ The most common traits exhibited by women are kindness, emotion, and determination, and the least are leadership, wisdom, and logic.¹⁵⁷ Conversely, men are shown in leadership roles, in professional settings, exerting physical strength, in roles of authority, playing sports, and showcasing wisdom and knowledge of science.¹⁵⁸ They are not shown on a diet, concerned about their health, or taking interest in fashion or shopping.¹⁵⁹

Campaigns for Change: #YouDon'tSeeMe

While ongoing efforts are needed, some organizations are leading by example. Launched in July 2023, the Unstereotype Alliance India national chapter, along with industry partners, launched the #YouDon'tSeeMe campaign in response to survey findings indicating that both women and men see themselves portrayed stereotypically in advertising.¹⁶⁰ The campaign sheds light on the importance of unstereotyped advertising, and aims to promote gender-positive messaging.¹⁶¹



Reframing masculinity

Gender stereotypes in advertising exist for women and men. The GUM finds that men are portrayed as independent and confident more than they were in previous years.¹⁶² Portrayals of men as caring peaked during COVID-19 but has since dropped, and in 2023 the portrayal of men as foolish is higher than previous years.¹⁶³ Findings from Argentina indicate that men are portrayed as less multifaceted than women, and are often shown as determined, leaders, cunning and wise, rather than affectionate, kind, or empathetic.¹⁶⁴ Findings from Türkiye highlight most men in the TV ads studied are not shown in a homemaker role, however there is an increase in the presence of male leads as homemakers from 6% on average between 2019-2021 to 10% in 2022.¹⁶⁵

Reframing concepts of masculinity comes at the heels of new research highlighting shifts in gender norms around the world, particularly related to care. *The State of The World's Fathers 2023* report surveying around 12,000 people across 17 countries indicates that, although women continue to do the majority of care and household work, multi-country averages show that 89% of men surveyed feel as responsible for care work as their partner.¹⁶⁶

Despite shifts, advertising may not necessarily reflect the ways that men wish to be portrayed. According to BBD Perfect Storm's *The Price of Success* report, which surveyed 4,000 men from the US and UK and asked how they described success at a young age, top answers included making money, having material things, having a glamorous lifestyle, and being famous.¹⁶⁷ However when asked what success looks like to them now, top answers included feeling content in their day-to-day lives, having good relationships, taking care of their health and wellbeing, and having a life partner who loves and supports them.¹⁶⁸ Overall, 51.3% of men surveyed indicated that media is likely or very likely to negatively impact how successful they feel, and the way the media portrays success (linked to making money, having a glamorous lifestyle, material things, and being famous) are the exact things that negatively impact how successful men feel.¹⁶⁹

It is imperative that companies and brands ensure that the portrayals of people of all genders are free from stereotypes, and that content promotes a range of characteristics linked to masculinity, rather than monolithic, unchanging narratives.¹⁷⁰

Brands breaking down traditional masculine stereotypes

In 2023, X3M Ideas Nigeria released an ad that depicts a male teacher helping a little boy in his class to learn math.¹⁷¹ The ad takes the viewer through a journey of the teacher spending 1-on-1 time with the student and exploring unique ways to teach him.¹⁷² The ad authentically and naturally shows the teacher as a role model, the bond between teacher and student, and shows him as a caregiver in his home environment, reframing notions of masculinity with a relatable portrayal of men's caring nature.¹⁷³

Disability and accessibility

The second State of the Industry report (2022) underscored the importance of ensuring that individuals with disabilities are represented and progressively portrayed in ads, as well as ensuring that ads themselves are accessible.¹⁷⁴ The representation of people with disabilities in ads continues to lag – the GUM findings indicate that the presence of people with disabilities in ads is still just 1%.¹⁷⁵ Some countries have a higher representation, including Germany, the Netherlands, and the UK, while others have a lower representation, including China, India, Indonesia, Saudi Arabia, and South Africa.¹⁷⁶ Across GUM markets, people with disabilities in lead roles have also dropped from 2022 to 2023.¹⁷⁷ Across the Effie TV ads surveyed in Türkiye in 2022, 1.4% of characters were people with disabilities.¹⁷⁸ In Mexico, less than 1% of characters in ads studied have a disability.¹⁷⁹ Findings from the Brazil *Representa* study indicate that of the content studied, only 1.2% showed people with disabilities.¹⁸⁰

Even when present, the stereotypical portrayals of people with disabilities persists. Guidance from Kantar indicates that brands must ensure they avoid common tropes that paint individuals with disabilities as dependent, ‘odd’ and eccentric, or aggressive, and instead promote portrayals that feature independence, motivation, ambition, and creativity.¹⁸¹

Further, inclusive language should be used when communicating about disability.¹⁸² This includes person-first language, referring to an individual before their disability, and avoiding language that describes disability as a deficit.¹⁸³

Organizations are providing resources that brands can leverage – in 2023 Getty Images launched #AutisticOutLoud, a custom content initiative featuring images and videos that break down stereotypes related to autism and showcase diverse and authentic depictions of people with autism.¹⁸⁴ Ultimately, brands must ensure that individuals with disabilities are meaningfully included in the development of ads and creative content, to help ensure that portrayals are free from stereotypes.

Ad content, as well as products and services must be accessible. Organizations like Wunderman Thompson are encouraging companies to embed inclusive design within their brand ethos, including ensuring that products themselves are accessible, that marketing includes accessibility features (e.g. closed captioning or audio description), and that technology and perspective-sharing is leveraged.¹⁸⁵ Additionally, Microsoft abides by inclusive design principles and provides guidance on embedding these principles in efforts, including an Inclusive 101 Guidebook, an Inclusive Design for Cognition Guidebook, the Pursuit of Inclusive AI guide, and other resources.¹⁸⁶

Promoting accessibility

ISBA and Flock have created REFRAME: Guidance for Marketers, providing guidance to marketers on embedding accessibility into advertising campaigns.¹⁸⁷ The aim is to drive the industry towards Accessible AV advertising by June 2024.¹⁸⁸ The guide notes that advertising must consider visual, auditory, cognitive and motor disabilities, and develop supports including: subtitles, signing, contrast, audio description, and consider readability, interactivity, and navigation, among others.¹⁸⁹ Their updated guide provides strategies to support organizations in meaningfully embedding inclusive design in all efforts.¹⁹⁰



Enhancing visibility of the LGBTIQ+ community

Findings across a number of sources indicate that representation of the LGBTIQ+ community in ads remains low, and consumers are taking note. The GUM finds that visibility of *LGBTQ+* characters in ad content sits at 3% across the markets studied.¹⁹¹ Some countries have made progress, including Indonesia, Vietnam and the Philippines, while others have regressed.¹⁹² Findings from Mexico also highlight that less than 2% of analyzed characters are from the *LGBTQIA+* community.¹⁹³ Similarly, a GLAAD survey reviewing 400 ads across the US found that only 1.42% feature *LGBTQ* individuals or their stories on screen.¹⁹⁴ Representation of the different identities and communities that form part of the broader *LGBTQ* community is not perceived as even. Among surveyed US consumers, 61% say they see gay and lesbian people in ads, however numbers drop for transgender, bisexual, and non-binary individuals (30%, 28%, and 23% respectively).¹⁹⁵

Consumers across the UK view the representation and inclusion of LGBTIQ+ individuals in ads as a priority – among 1000 adults surveyed, 66% believe that advertisers have a responsibility to provide visibility in their content of *LGBTQ* people, couples, families, and communities.¹⁹⁶ Consumers are expecting that brands move past simple representation and focus on authentic and realistic portrayals – 54% believe that good representation displays empathy and humanity, 54% realistic stories, 47% *LGBTQ* people of diverse backgrounds, 46% universal storylines, 41% displays of joy, 33% mentions of tangible actions, and 31% featuring known *LGBTQ* celebrities.¹⁹⁷

Diageo “She, a J&B Tale” ad

Released in Spain in December of 2022, Diageo’s commercial shows a grandfather exploring makeup and supporting his transgender granddaughter.¹⁹⁸ The ad highlights experiences of ‘homosexolitude’ that many in the LGBTIQ+ community experience, where feelings of being unable to be one’s authentic self is magnified during the holidays.¹⁹⁹ Further, the caring role in the ad is performed by an older man, challenging notions of age and gender in an authentic way. Ultimately, the ad explores intersections of age, gender, and sexuality, showing tender and vulnerable moments where individuals are able to be their authentic selves in the presence of loved ones.

A focus on age

Of increasing importance is the need to ensure that individuals of all ages, and particularly older adults, are represented within advertising, and that their portrayals are free from ageist stereotypes. According to a CreativeX study of 126,000 global ads released in 2022, only 4% of people cast in ads were over the age of 60.²⁰⁰ Findings from the Effie Awards Türkiye Gender Equality Report 2022 also highlight disparities – across ads studied, only 12% of lead characters are aged 50 and older.²⁰¹ Findings from Mexico reveal a similar pattern, with 91.2% of characters under the age of 50.²⁰² Findings from the Brazil *Representa* study indicate that of the 247 brands studied, older adults were the protagonists in 19 of them, and when considering gender, race, and age, findings indicate that no older Black women were shown across the brands studied.²⁰³

Intersectional experiences linked to gender and age exist. Effie Awards Türkiye findings indicate that 55% of women leads were depicted in their 20s, while women aged 50 and older only represent 3% of individuals (compared to 15% men).²⁰⁴ Similarly, findings from Mexico highlight that women aged 60 and older represent 2.3% of individuals shown.²⁰⁵ A pattern emerges where women in their 20s are shown more than men, however women in their 30s, 40s, 50s, and 60s+ are shown less than men.²⁰⁶

Representational disparities may be linked to organizations continuing to cater to younger audiences. 2023 findings from the *Age of Majority* survey of 931 adults across the US highlight that organizations and marketers continue to prioritize younger consumers given their perceived spending power.²⁰⁷ Among survey respondents, 71.9% believe that consumers under the age of 35 are worth more and 50.2% believe that younger consumers will feel alienated if brands also target older consumers.²⁰⁸ The study did find that brands are seeing the value and need to appeal to older audiences, and 55.9% indicate that they want to target individuals aged 50+ more than they currently do now.²⁰⁹

The Growing Older, Better campaign launched by Alive Ventures notes that media tends to showcase older adults in one of two extremes: as frail or as overly adventurous, with very little representation in the middle.²¹⁰ Other sources have found similar stereotypes within ads: showcasing older adults as technologically less savvy and more physically weak.²¹¹ It is clear that greater focus on ensuring both the representation and progressive portrayal of older adults in ads is a priority, and will require shifting the mindsets of individuals working on brands and within the creative industry.



Barriers to action

Consumers expect brands to mitigate barriers in advertising. A study of 3,300 “Gen Z” individuals in the US, UK, and Brazil found that 61% said “brands and influencers have a responsibility to ensure their branded content is not stereotypical, and helps contribute to a safer, more inclusive and unsterotypical world”.²¹² If brands and their employees, as well as consumers recognize the need to mitigate stereotyping in content, why do some brands and organizations shy away from more concrete

efforts? Findings from Kantar indicate several key barriers, including the fear of getting it wrong, brands feeling overwhelmed with information, the challenge of embedding DEI within an organization, and the struggle or portraying a story different than one’s own.²¹³ These perceived barriers should not impede efforts for concrete change, and the Unstereotype Alliance offers guidance and a number of proprietary tools that brands can reference to navigate and overcome them.

Actions for change

Supplier diversity

Previous editions of the State of the Industry Report highlight the importance of supplier diversity. Survey findings from ANA/AIMM’s *The Marketing Community’s Support of Diverse Suppliers* report indicate that supplier diversity remains a lever for change.²¹⁴ Among the 89 diverse suppliers in the US surveyed, 56% indicate that interest from the marketing/advertising community in supporting diverse suppliers has either increased a lot or increased some in the past year, and 38% agree that investment from the marketing/advertising community has increased in the past year.²¹⁵ Looking ahead, 46% expect an investment in their business from the marketing/advertising community to increase next year.²¹⁶

Ongoing opportunities exist for companies to increase diversity across their supply chain. Diverse suppliers note several barriers to gaining business, including lack of feedback when they do not get the business (70%) and getting their foot in the door with national advertisers/agencies (59%).²¹⁷ As such, organizations have an opportunity to enhance transparency throughout the supplier selection process, providing feedback to unsuccessful suppliers, supplier/buyer networking opportunities, and enhancing transparency on evaluation metrics.

Setting expectations of suppliers

In addition to sourcing from diverse suppliers, brands and organizations increasingly require suppliers to demonstrate commitment and/or compliance with diversity and inclusion related values. Many organizations have set expectations of suppliers related to anti-human rights abuses. Others have taken a step further, requiring suppliers to actively participate in working towards diversity and inclusion. In addition to sourcing from diverse suppliers, Diageo, for example, sets expectations of suppliers and agencies by requiring advertising agencies to disclose the gender balance within their organization, share their plans to enhance diversity and inclusion, and their efforts to improve positive gender and ethnic portrayals in media.²¹⁸

Resource and training development

Some organizations are extending their commitments to unsteretyped advertising, and are developing resources to support these efforts.

As advertising agencies, companies and brands increase their engagement with influencers to drive consumer engagement, the need to ensure influencers avoid perpetuating stereotypes within their own content is crucial.²¹⁹ In 2023, **Unilever** committed to include guidance around stereotypes and ways to avoid them within all influencer partnership agreements, requiring influencers to assess their content for stereotypes.²²⁰ The guide 10 Ways to Unstereotype Influence Brand Content features strategies for ensuring that influencers consider their influence, appearance, and authenticity, with key questions to prompt thinking across each theme.²²¹

Advertising self-regulatory bodies driving change

Advertising self-regulatory bodies play an instrumental role in receiving complaints about stereotyped and inappropriate ads, evaluating content, and removing content that violates said regulations. The regulatory ecosystem is now taking it a step further, moving towards the proactive encouragement of diverse and inclusive content development. In April 2023, the International Council for Advertising Self-Regulation (ICAS) announced the launch of the new DEI Award category.²²² The award, set to launch in 2024, was developed in partnership with the Unstereotype Alliance and aims to encourage global advertising standards bodies to support initiatives for more diverse and inclusive ads.²²³

In 2023, the Committee of Advertising Practice (CAP) in the UK developed the Guidance on Avoiding Racial and Ethnic Stereotypes in Ads.²²⁴ The document includes CAP Code Rules, as well as guidance against depictions that promote stereotyped characteristics and roles, mocking and insensitive depictions, sexualization, and other themes to consider and avoid.²²⁵

Working with Artificial Intelligence (AI)

The rise of AI provides new and unique opportunities and challenges for the advertising industry. Kantar employed a consumer survey of 16,000 interviews across 23 markets and a marketer survey of 900 marketing professionals globally and found that 66% of surveyed marketers and 55% of surveyed consumers feel positively about the possibilities of AI in media.²²⁶

Despite the general optimism, it is important for marketers to approach the use of AI with caution. Research shows that gendered and racial biases can be embedded within AI image generation softwares and tools. For example, an analysis of 5,100 photos of AI-generated people revealed that images depicting people with “high paying jobs” commonly featured men (compared to women), and people of lighter skin tones (compared to darker skin tones).²²⁷

As the industry explores the use of AI, resources such as the Global Alliance for Responsible Media (GARM) Safe & Suitable Innovation Guide can be leveraged to offer guidance on the practical and thoughtful use of these tools.²²⁸ GARM highlights the risks associated with generative AI and brand safety and suitability, and the need for advertisers to be mindful of the production of harmful content, misrepresentation and misinformation, and bias, among others.²²⁹ The guide ultimately provides organizations with considerations and strategies for support.²³⁰ The United Nations has also begun the process of considering globally inclusive governance options for AI.²³¹ This began by convening a multi-stakeholder high-level advisory body on AI in late 2023 to advise on recommendations for international governance,²³² as well as the publication of the interim report on Governing AI for Humanity.²³³ Efforts extend into the fall of 2024 with stakeholder consultations and additional efforts to strengthen stakeholder cooperation on governing AI.²³⁴

This is also a burgeoning area for the Unstereotype Alliance, and its newly launched ‘Inclusive Media’ workstream will be initiating projects that seek to protect DEI progress made to date in the use of AI, and ensure that AI-generated content is free of stereotypes.



Recommendations

- Evaluate the screen time and presence of women and underrepresented groups (including people of different races, ethnicities, ages, people with disabilities, and individuals of the LGBTIQ+ community) within ads
 - Ensure that intersectionality is represented
 - Ensure that diversity is included on an ongoing basis, and not solely used during days/months of recognition (e.g. GLAAD recommends that organizations evaluate whether they only feature individuals of the LGBTIQ+ community during Pride Month and to ensure this community is well-represented year-round).²³⁵
- Ensure portrayals are authentic and strengths-based. Use frameworks such as the Unstereotype Alliance's 3Ps Framework and consider the following:
 - Do portrayals feature a static, unchanging version of a community (e.g. do ads represent only one form of "masculinity")? Commit to understanding the common stereotypes often represented about women and different underrepresented groups to then combat them within content proactively.
 - Is the story of a community being developed and told solely by individuals external to this community? Ensure diversity within the full content development process.
- Recognize that 'who makes the work, shapes the work', thus diverse representation throughout the entire creative process is essential to ensuring authentic and unstereotyped portrayals.
 - Develop proper accountability mechanisms for content development and consistent review are in place to ensure that content has been considered from multiple angles.
- Leverage available resources to embed inclusive design throughout the creative process.
 - Ensure that content itself is accessible, including the use of alt text, closed captioning, and other accessibility features.
- Develop supplier diversity goals while also establishing DEI expectations for suppliers and vendors.
- Mitigate biases given changes in marketing efforts:
 - Consider the rise of AI generative images and Large Language Models (e.g. Chat GPT) and leverage resources to navigate changes.
 - Be selective with the influencers chosen to engage in influencer marketing, and ensure alignment between the brand and influencer's values.



3

EMPOWERING PUBLIC ACTION AGAINST STEREOTYPES

Consumer expectations

According to the sixth addition of the global Salesforce State of the *Connected Consumer* report, links between consumer trust and brand actions remain strong. Among 11,000 consumers and 3,300 business buyers surveyed across 25 different countries, 67% of consumers surveyed completely trust or mostly trust brands that tell the truth, 67% trust brands that make honest claims about their social initiatives, and 63% trust brands that act with society's best interests in mind.²³⁶

DEI remains important for employees and consumers. *The 2023 Edelman Trust Barometer*, surveying over 32,000 individuals from 28 countries, finds that 80% of employees want their CEO to take a public stance against discrimination.²³⁷ Specific to advertising, a 2023 US survey of 1,200 consumers highlights that 63% of surveyed consumers indicate that diverse representation in advertising is definitely or somewhat important to them, and 51% indicate that diversity in advertising has a positive impact on society.²³⁸ 47% of those surveyed indicate that they are likely to buy from a brand that includes diversity in their ads.²³⁹

Priorities differ between communities. YouGov data of 230,000 adults across Great Britain found *LGBTQIA+* individuals are more likely to say that they like brands that are willing to get involved in social issues (59% vs. 37% of their *non-LGBTQIA+* counterparts), not buy from a brand whose views do not align with their own compared to their *non-LGBTQIA+* counterparts (64% vs 50%), and are more likely to buy from

a brand that expresses a view they agree with in their advertisements (59% vs. 45%).²⁴⁰

Leveraging advertising self-regulatory bodies for change

Consumers continue to exercise their power by leveraging self-regulatory bodies to have harmful ads removed:

- Findings from ICAS shows that, according to Ad Standards Australia, 251 complaints were waged against ads claiming discrimination or vilification in 2023. Notable examples of upheld cases included claims of ageism against older individuals and racism against Black individuals.
- The Advertising Regulatory Board (ARB) of South Africa investigated a radio commercial in South Africa after many complaints that the ad perpetuated homophobic and discriminatory undertones.²⁴¹ The ARB ultimately ruled that the ad content was discriminatory, and could not be aired in its current format.²⁴²
- Findings from ICAS highlight that the Advertising Standards Authority UK received 126 complaints in 2023 related to harmful stereotypes, particularly related to gender. Notable cases relate to harmful depictions of body image, sexual objectification, and the representation of women doing domestic work while upholding notions that men are not good at these types of tasks.



Maintaining momentum

As we near the 2030 Sustainable Development Goals for achieving SDG 5 for Gender Equality and SDG 10 for Reduced Inequalities, and reflect on the many pledges and actions brands have taken particularly following the murder of George Floyd in 2020, it is important that brands maintain momentum, build on initial pledges, and commit to sustainable actions that support underrepresented communities.

Previous editions of the State of the Industry report^{243, 244} documented the many commitments that brands made to stand in support of underrepresented communities, and the tangible ways brands were making change through donations, days of recognition, and other efforts. Long term, sustainable commitments are needed to drive change. Embedding DEI within a brand's fabric and monitoring these efforts on a regular basis ensures that authentic action is taken. This third State of the Industry report explores the ways that organizations are building on previous commitments to meaningfully embed DEI initiatives internally, and in support of the communities they serve.

Brands continue previous commitments

In 2022, Mars convened the M&M's FUNd Advisory Council of experts to advise on M&M's brand programming related to DEI.²⁴⁵ The FUNd Advisory Council remains strong, and in 2023 as part of the International Women's Day initiative, ten winners were featured on M&M's platforms and received \$10,000 grants for their business ideas.²⁴⁶

Unilever's Dove, the National Urban League, Colour of Change, and the Western Center on Law and Poverty launched the Creating a Respectful and Open World for Natural Hair coalition (CROWN) in 2019, stemming from research by Dove indicating the racial discrimination that Black women often experience associated with their hair.²⁴⁷ As of 2023, 23 out of 50 states have enacted the CROWN Act into law, showing their commitment and support, and more than half of all States have filed or prefiled this legislation for consideration.²⁴⁸

Embedding DEI holistically

Bloomberg's Gender Equality Index highlights companies around the world that are investing in women in the workplace, supply chains, and in communities. The 2023 Index including 484 companies (up from 418 companies in 2022),²⁴⁹ and over 600 organizations disclosed gender-related data as part of the Gender Reporting Framework.²⁵⁰ Unstereotype Alliance member companies continue to make the list, including Unilever PLC, Bayer AG, Danone SA, Diageo PLC, Mastercard Inc., Publicis Groupe SA, Vodafone Group PLC, and WPP PLC.²⁵¹

Many Unstereotype Alliance members are embedding DEI into their everyday work, building it into their long term strategy, and implementing ongoing, measurable efforts for diversity and inclusion through plans to support staff internally, and build up community, including:

OMNICOM: has been measuring diversity and inclusion across the organization since 2020, establishing milestones and key performance indicators each year.²⁵² Their action plan for 2022 highlights the progress they've made since 2020 and their aspirations in the coming years.²⁵³ They have set goals, namely to increase the representation of "BIPOC" (Black, Indigenous, and people of colour) individuals broadly to 35% and women in leadership to 52% by 2026.²⁵⁴ Their 2022 diversity and inclusion report outlines the following:

- Diversity across the organization and representational changes per year²⁵⁵
- The use of employee resource groups to form connections and foster change²⁵⁶
- Expanding internal knowledge of diversity and inclusion through training²⁵⁷
- Expanding internal health and wellness benefits, particularly for the *LGBTQIA+* community²⁵⁸
- Partnering with local organizations and universities to build the talent pool of young, diverse advertisers, as well as developing partnership with organizations to break down stereotypes and bias²⁵⁹



UNILEVER: undertakes annual efforts to support employees in all their diversity internally, and give back to their community.²⁶⁰ Their long term plan includes:

- Piloting a new framework to assess policies and practices to mitigate biases²⁶¹
- Monitoring and accelerating diverse representation at all levels of leadership²⁶²
- Enhancing accessibility within the recruitment process to ensure people with disabilities are represented²⁶³
- Committing to spend 2 billion annually with diverse businesses around the world by 2025²⁶⁴
- Increasing diverse representation in ads themselves as part of their commitment to the Act 2 Unstereotype Initiative²⁶⁵

PEPSICO continues to embed DEI internally, supporting families and individuals with caregiving responsibilities through parental leave, childcare, inclusive and family-friendly facilities, flexibility, and other efforts.²⁶⁶ They have further implemented specific programming to support the advancement of women into leadership roles.²⁶⁷ Coupled with internal efforts, they continue to support women-owned businesses and build diverse and resilient supply chains, including pitch competitions and mentorship programs.²⁶⁸



Responding to criticism

While many studies show that consumers expect brands to showcase diversity in their ads, address discrimination, and support underrepresented communities, organizations also risk criticism for their efforts. When speaking out in support of DEI and social justice, brands risk “getting it wrong”, where they may not have acted authentically or not consulted with underrepresented groups adequately, despite their best efforts. On the other hand, brands may also face criticism from consumers that are against the DEI movement more broadly. The fear of criticism and concerns about potential economic costs (including decreases in revenue and consumer base) may lead to inaction, where brands go silent and cease all efforts. Industry leaders, however, assert that fear of criticism cannot be a deterrent to

speaking out, supporting and working with underrepresented communities.²⁶⁹ Criticism doesn’t automatically mean a full loss of brands’ consumer base.²⁷⁰ What is most important is that brands continue to be mindful when developing content, consistent with their DEI initiatives, and respond thoughtfully to criticism including apologising, when appropriate.

Criticism is unique to each situation and cultural context, and should be handled with care. The Unstereotype Alliance UK National Chapter has created the *Creative Bravery Beyond the Backlash toolkit*, encouraging brands to look beyond the fears of cancel culture and offering them insights towards acting authentically and responding to criticism:

- Extending beyond individual campaigns and doing the foundational work with communities
- Ensuring that leadership teams are prepared to stand behind their messaging
- Embracing active listening during the creative process and when given feedback
- Placing emphasis on impact rather than intention and recognizing that a campaign or effort, while not intentional, may have inadvertently offended a community
- Supporting staff and talent if criticism turns offensive
- Holding true to your values and avoiding double backlash that alienates supporters and critics

Challenging stereotypes: everyone's responsibility

Maintaining momentum and striving for long lasting change requires effort on the part of brands and consumers. The stereotypes that exist at a societal level seep into those found within ads, thus perpetuating and reinforcing our pre-existing stereotyped beliefs. It is therefore everyone's responsibility to take a stand and speak out against stereotypes, when it is safe to do so. In 2023, the Unstereotype Alliance launched the #SayNothingChangeNothing campaign to mobilize public action. The

campaign, which was spearheaded by UN Women Goodwill Ambassador Danai Gurira, includes an Unstereotype 101 guide with resources and tips on how to address stereotypes in a number of different settings and contexts. The campaign and resources explain the harmful impacts of stereotypes, and provide individuals with the necessary tools to challenge them, with the aim of having a positive impact more broadly at the organizational and societal levels.

Recommendations

- Consumers scrutinize how brands behave both externally and internally, and they seek out brands whose values align with their own. Commit to DEI goals both in the workplace and the marketplace, and couple efforts to support local communities through pledges, donations, funds, and other efforts to support employees internally.
- Embed social purpose within brand values and strategy to ensure it doesn't exist as an afterthought. This helps continuity in messaging and mitigates perceptions of 'woke-washing' and inauthentic action.
 - Be open about goals, and the progress made toward achieving them.
 - Remain consistent in your efforts, while also being open to supporting new causes.
- Learn from previous mistakes and leverage existing guidance when responding to criticism.

Conclusion

The Unstereotype Alliance continues to promote DEI across the global advertising industry by encouraging diverse representation and a culture of belonging within organizations themselves and ensuring diverse and progressive, unstereotyped portrayals of individuals in ad content. Member organizations around the world continue to demonstrate their ongoing efforts towards these goals in order to meet consumer and employee expectations. Moreover, they uphold their DEI commitments in recognition of the power of progressive advertising to drive positive social change.

The State of the Industry 2023 report highlights that, according to the *WFA Global DEI Census 2023*, women are highly represented at the junior executive/intern/apprentice/trainee level (70% women and 30% men), with representation dropping at the executive management/C-suite level (50% women and 50% men).²⁷¹ Findings across the UK²⁷² and the US²⁷³ indicate the need to increase the representation of people of different ethnicities and races, people with disabilities, members of the LGBTIQ+ community, and older adults. Coupled with this is the ongoing need to promote inclusion and belonging across the industry, where people in all their diversity are respected and valued.²⁷⁴

Within ad content, findings from the GUM indicate increased screen time for women year after year since 2019,²⁷⁵ however GUM findings, as well as findings across various countries, highlight gaps in the representation of different

racess, ethnicities, and skin tones, people with disabilities, the LGBTIQ+ community, and older adults. Efforts are also needed to ensure authentic and unstereotyped portrayals of individuals of different genders, particularly the reframing of masculinity to portray men as multifaceted rather than monolithic.²⁷⁶ Greater efforts are also needed to address stereotyped portrayals of people of diverse ethnicities, races, people with disabilities, and the LGBTIQ+ community, older individuals, and people with different body types.

The report highlights ongoing consumer expectations of diverse representation in ads and ongoing links between consumer trust in brands that act in favour of the good of society. As such, maintaining momentum with regard to supporting underrepresented communities, particularly in the face of changing priorities, is critical to a brand's sustained success.

Accountability in all efforts is of the utmost importance. Leveraging reporting frameworks, like the forthcoming Unstereotype Alliance Charter of Accountability, will support this. Companies should be transparent with their employees, consumers, and stakeholders about their efforts towards mitigating internal barriers to enter the industry, retention, and advancement, as well as their efforts towards increased representation and unstereotyped portrayals in ads, and their ongoing actions for supporting communities by holistically embedding DEI in all efforts.

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Unstereotype Alliance
220 East 42nd Street
New York, NY, 10017

 www.unstereotypealliance.org

 unstereotypealliance@unwomen.org

 @unstereotypealliance

 @un_stereotypealliance

 @UnstereotypeAlliance

 @un_stereotype