

STATE OF THE INDUSTRY

2

2021-2022



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ALLIANCE





Acknowledgments

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Definitions of Terminology

This report makes references to several key terms and groups, notably under-represented individuals/groups, accessibility, diversity, equity, inclusion, intersectionality, and people living with disabilities.

Under-represented individuals/groups: individuals and/or groups that, currently and throughout history, have experienced various forms of inequality and discrimination. These groups/individuals tend to be under-represented in ads and media in general. 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.¹

Accessibility: means “to enable persons with disabilities to live independently and participate fully in all aspects of life”.² 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.³

Diversity: differences that occur among individuals; including but not limited to race, ethnicity, nationality, religion, socioeconomic status, education, marital status, language, age, gender, sexual orientation, ability, and others.⁴

Equity: recognizes that not everyone begins at the same starting point given barriers related to discrimination, marginalization, and others.⁵ Equity accounts for peoples’ differing experiences, needs and abilities and works to ensure all individuals and groups are afforded the same finish line.⁶

Inclusion: ensures that all individuals are respected and feel a sense of dignity and belonging.⁷ Inclusive environments embrace differences and ensure that all individuals are valued.

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

People living with disabilities: individuals who have “physical, mental, intellectual, or sensory impairments which in interaction with various barriers may hinder their full and effective participation in society on an equal basis with others.”⁹ In line with the social model of disability, truly supporting individuals living with disabilities requires the elimination of physical, social, communication, and attitudinal barriers.¹⁰

A note on terminology: UN Women uses the following language and terminology for various communities and populations: people of colour, LGBTIQ+, people living with disabilities, and under-represented individuals/groups. This report uses quotation marks around specific terminology used by cited sources that differs from UN Women’s terminology.

Executive Summary

The state of diversity, equity, and inclusion across the advertising industry has shifted in the last two years. The Unstereotype Alliance State of the Industry Report 2020-2021 highlighted the levels of diversity and inclusion within agencies and organizations across the industry, revealing gaps in both the representation of women and under-represented individuals/groups, but also negative perceptions of inclusion.¹¹ The report further explored the presence and portrayal of individuals in ads, finding gender disparities in presence and speaking roles, and persisting traditional and stereotyped portrayals of individuals in ads.¹² Finally, the report provided insights into consumer behaviours and expectations, highlighting consumer desires for companies to speak out against social injustices, as well as expectations

for companies to make meaningful changes both internally and within communities to support diversity, equity, and inclusion.¹³

Since the publication of the first State of the Industry Report, progress has been made across the report's three key pillars: fostering workplace equality, achieving unstereotyped advertising, and empowering public action against stereotypes. Despite this progress, opportunities for supporting individuals in all their diversity throughout the industry, increasing the presence and decreasing unstereotyped portrayals of women and under-represented groups in ads, and ensuring company solidarity and action on social issues remain pertinent.

Fostering workplace equality

Findings from a global LinkedIn 2022 analysis highlights the representation of women across the industry,¹⁴ as well as updated findings from the Alliance for Inclusive and Multicultural Marketing (AIMM) in the U.S.,¹⁵ and the Institute of Practitioners in Advertising (IPA) in the U.K.¹⁶ reveal slight increases in the representation of women and individuals of different racial and ethnic identities across the industry, yet minimal information on the representation of members of the LGBTIQ+ community and people living with disabilities. Further, workplace inclusion remains low, with global findings from the World Federation of Advertisers (WFA)¹⁷ and more granular findings from ShEqual in Australia¹⁸ highlighting negative perceptions in career advancement opportunities and experiences of unfair treatment in the workplace.

In an effort to foster meaningful change and promote diversity, equity, and inclusion across the industry, companies continue to collect disaggregated data to better understand the experiences of women and under-represented groups and individuals in the workplace. Further, many continue to strive towards goals and targets for increasing representation, as well as implement initiatives to foster workplace inclusion, belonging, and support for career growth. Others are signing on to global pledges that promote transparency and accountability in efforts, namely the Women's Empowerment Principles (WEPs) aimed at supporting businesses in promoting gender equality in the workplace, marketplace, and community.¹⁹

Achieving unsteretyped advertising

Findings from both the Unstereotype Alliance Unstereotype Metric²⁰ and the Geena Davis Institute on Gender and Media and Cannes Lions *The Purpose Driven Progress: Advancing On-Screen Diversity and Inclusion Through Accountability* report²¹ highlight increases in the presence of women in ads, as well as increases in women’s speaking roles. Similarly, both studies highlight increases in the presence of people of colour in ads. Despite this progress, the presence of individuals from other under-represented groups remains low, and traditional and stereotyped portrayals of women, men, and under-represented individuals and groups persist.²²

Recognizing the need for both an increase in the presence of people in all their diversity as well as

progressive portrayals of individuals free from bias and stereotypes, companies are implementing efforts for meaningful change. Many continue to collect data on the presence and portrayal of characters broadly across the industry and within in their *own* ads. Further, companies continue to develop pledges and partnerships to promote diversity, equity, and inclusion throughout the creative process and to support the next generation of individuals working in the industry. Companies and organizations are developing guides to advise on best practices for portraying individuals authentically and progressively in ads, and for many, the importance of supplier diversity has increased, with companies increasing budget allocation towards women and under-represented vendors.

Empowering public action against stereotypes

Consumer desires for brands to reflect their personal values remain strong, and consumers continue to use their purchasing power to hold brands accountable for inaction against inequality and social injustice.²³ Coupled with increased desires for companies and brands to commit to addressing social inequality, consumer trust in brands to tell the truth and act with society’s best interest in mind has increased.²⁴

While consumers are calling on companies and brands to take a stand on issues and are trusting brands to uphold these efforts, statements and initiatives that lack authenticity risk enabling and perpetuating tokenism and commodification and may ultimately be labelled by consumers as “woke-washing,” a term used to identify brands that disingenuously use social justice movements to connect with consumers.²⁵ Moreover, fears of cancel culture and consumer repercussions for company missteps may impact the degree to which companies speak out against social injustice.²⁶

In an effort to avoid tokenism, commodification, and woke-washing, many companies are coupling statements with meaningful actions to support and uplift communities in need. Others are continuing to speak out against social injustice without concerns of cancel culture. Moreover, consumers and standards authorities continue to take swift action to call out harmful advertising and ensure ad removal.



Introduction

The Unstereotype Alliance State of the Industry Report 2020-2021 explored the state of diversity, equity, and inclusion across the global advertising industry and presented a snapshot of representation and inclusion across the industry, presence and progressive portrayals in advertising content, and consumer and brand action to combat inequality and stand in solidarity with social justice efforts.²⁷ The report identified gaps in efforts to support diversity, equity, and inclusion and explored the actions taken in the wake of global shifts to achieve meaningful change against three key pillars: fostering workplace equality, achieving unstereotyped advertising, and empowering public action against stereotypes.²⁸

This second State of the Industry Report provides an update on diversity, equity, and inclusion initiatives since May 2021, highlighting both progress and opportunities for further action across the three pillars. Further, the report revisits previous brand commitments and, through the lens of the recommendations outlined in the first report, identifies recent actions that organizations across the industry have taken to promote diversity, equity, and inclusion.

Since May 2021, across data points analyzed, the representation of women and individuals of different global racial and ethnic groups working in the advertising industry has increased slightly. In some cases, data collection has expanded to better understand the experiences of individuals in all their diversity, including the experiences of non-binary individuals and individuals of different racial and ethnic identities not previously included in self-identification surveys.²⁹ Despite these improvements, little information on the representation of individuals of the LGBTIQ+ community and people living with disabilities is collected in the sources examined.³⁰

Additionally, workplace inclusion remains a barrier to career retention, growth, and full and equal participation of individuals in all their diversity in the workplace, with many citing barriers to career growth and opportunities as well as unfair treatment.³¹

Across ads studied, overall progress has been made in the representation of women and individuals of different racial and ethnic identities, yet a lack of representation for other under-represented individuals and groups, namely people living with disabilities, individuals part of the LGBTIQ+ community, and people of different ages and body types persists. Further, little progress has been made in the progressive portrayal of women, men, and under-represented individuals in ads. Gaps persist in the depiction of individuals as authoritative, and women and men continue to be portrayed in “traditional” roles.³²

Finally, consumer expectations for companies and brands to align with their values, speak out against social injustice and act authentically remains strong. Most consumers surveyed believe that brands will act truthfully and remain firm in their ability to use their purchasing power to hold brands accountable.³³ Further, both consumers and standards authorities continue to take swift action to call for the removal of harmful ads.



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The business case for diversity, equity, and inclusion

Fostering diversity, equity, and inclusion in the workplace is crucial for talent recruitment, retention, and employee loyalty. According to a global Deloitte study, among those who do not feel heard in the workplace, only 24% of Gen-Z and 25% of Millennials surveyed are likely to stay at their company for 5 or more years.³⁴ Conversely, 47% of Gen-Z and 54% of Millennials who do not feel heard in the workplace are likely to leave within a year.³⁵ A U.S.-specific survey revealed that 80% of individuals surveyed state inclusion is important to them when selecting an employer.³⁶ Further, 39% said they would leave their place of work for a more inclusive organization.³⁷ Diversity and inclusion can also positively impact innovation, productivity, and company reputation. Global findings from the International Labour Organization (ILO) indicate that when enterprises have inclusive workplace cultures, the predicted probability of achieving increased profitability and productivity is 62.6%; greater creativity, innovation, and openness is 59.1%; and enhanced company reputation is 57.8%.³⁸ Further, implementing meaningful efforts to promote diversity, equity, and inclusion is crucial for reaching consumers and strengthening brand loyalty. According to a survey of individuals across Brazil, China, Japan, the U.K., and the U.S., 66% of those surveyed indicated that they are more likely to purchase from a brand that speaks out on issues related to equality and inclusion, 63% said they'd be more likely to buy from brands making an effort to represent people like them, and 60% believe brands that do not deliver on inclusion will become irrelevant.³⁹ Insights from Australia in particular highlight that among those surveyed, 62% believe diversity in advertising is important, and 56% state that a lack of diversity impacts their perception of a brand.⁴⁰

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Fostering workplace equality



Progress since the State of the Industry Report 2020-2021

The Unstereotype Alliance 2020-2021 State of the Industry Report highlighted inequities in the representation of women and other under-represented individuals and groups within the advertising industry.⁴¹ Findings revealed gaps in the representation of women and people of colour working in the industry, coupled with negative perceptions of belonging and experiences of discrimination in the workplace.⁴² Since the first State of Industry Report, findings from a 2022 LinkedIn analysis, as well as updated findings from multiple surveys developed and disseminated by the Alliance

for Inclusive and Multicultural Marketing (AIMM) in the U.S. and The Institute of Practitioners in Advertising (IPA) in the U.K. reveal slight increases in the representation of women and individuals of different racial and ethnic identities in positions across the industry, however little progress and/or data availability in the representation of other under-represented groups. Additionally, findings from the World Federation of Advertisers (WFA) and ShEqual highlight negative perceptions of workplace inclusion and inequalities in career progression opportunities.

Changes in representation in the advertising industry

According to a recent LinkedIn analysis, there were 89,000 creative directors working in the marketing and advertising industry globally in March 2022, with 29% female and 71% male.⁴³ Slight increases in the representation of women were reported throughout the advertising industry since the first State of the Industry Report. Findings from AIMM's 2021 *A Diversity Report for the Advertising and Marketing Industry* highlights that among those surveyed across the Association of National Advertisers (ANA) in the U.S., women made up the majority of overall representation, at 67% in 2020 and 67.1% in 2021.⁴⁴ Similarly, 2021 findings indicate that women comprise 63.8% of employees in U.S.-based marketing departments of ANA board of directors and member companies (up from 62.9% in 2020) compared to 36.1% men and 0.1% non-binary people.⁴⁵ While more women are represented in senior level positions (54.8% compared to 44.9% men and 0.3% non-binary people), they are also over-represented in clerical and/or entry level roles (75.1% compared to 24.6% men and 0.3% non-binary people).⁴⁶ In terms of CMO/CMO-equivalents within participating ANA's client-side marketer companies, among those surveyed, women represent 54.6% of the top marketer positions in 2021, up from 52% in 2020.⁴⁷

Findings from the 2021 *IPA Agency Census* also show a slight increase in the representation of women in leadership roles in the U.K. advertising industry.⁴⁸ Among those surveyed, women occupied 33.5% of C-suite roles in 2021 compared to 32.4% in 2020.⁴⁹ In creative and non-media agencies, women represented 33.9% of C-Suite roles compared to 32.8% in media agencies.⁵⁰ Within C-Suite roles, women make up 51.8% of senior planning roles, 49.2% of senior account management roles, 41.1% of senior strategy roles, 31.1% of senior data management roles, and 22.2% of senior creative roles.⁵¹ Despite increases in leadership representation, representation remains below the 40% goal established by IPA in 2017, and, among those reporting salary breakdowns by gender and seniority, a gender pay gap favouring men has slightly increased, from 22.7% in 2020 to 23.3% in 2021.⁵² Further, the gender pay gap is higher in creative and other non-media agencies compared to media agencies (25.8% vs. 18.9%).⁵³

Increases can also be seen in the representation of individuals of different racial and ethnic identities. Findings from the AIMM 2021 *A Diversity Report for the Advertising and Marketing Industry* highlight that, across the entire ANA membership, the representation of African American/Black, American Indian/Alaskan Native, Asian, Hispanic/Latino, Native Hawaiian/Pacific Islander, and "Other" including multiracial individuals has risen slightly, from 26% in 2020 to 27.2% in 2021.⁵⁴ Among U.S.-based marketing departments of ANA board of directors and select member companies, the representation of individuals who are African American/Black, American Indian/Alaskan Native, Asian, Hispanic/Latino, Native Hawaiian/Pacific Islander, multiracial, and "other" has also risen from 28.5% in 2020 to 30.8% in 2021.⁵⁵ Further, among U.S.-based marketing departments of ANA board of directors and select member companies, 28.5% of African American/Black, American Indian/Alaskan Native, Asian, Hispanic/Latino, Native Hawaiian/Pacific Islander, Multiracial, and "Other" individuals hold senior-level positions (an increase from 26.4% in 2020); 30.3% hold mid-level/ upper-level positions, 29.3% hold mid-level/ lower-end positions, 33.1% hold entry-level/professional positions (an increase from 31.9% in 2020), and 39.4% hold admin/clerical/support positions.⁵⁶ It is important to note that in 2021 AIMM expanded data collection to include individuals identifying as American Indian/Alaskan Native and Native Hawaiian/Pacific Islander which was not previously done in 2020.⁵⁷ Representation of African American/Black, Asian, and Hispanic/Latino individuals among CMO/CMO-equivalents at ANA's client-side marketer companies has also risen, from 12% in 2020 to 13.7% in 2021.⁵⁸ In particular, the representation of African American/Black individuals has risen from 3% to 4.6%, the representation of Asian individuals has risen from 5% to 5.5%, yet the representation of Hispanic and Latino people has fallen from 4% to 3.6%.⁵⁹

IPA Agency Census results show similar increases, where 18.3% of employees identified as Asian and Asian-British, Black and Black-British, mixed and multi-ethnic backgrounds, and other ethnicities.⁶⁰ More specifically, Asian or Asian-British individuals comprise 7.9% of the employee base (up from 6.8%

in 2020),⁶¹ followed by Black or Black-British individuals at 4.4% (up from 3.6% in 2020), mixed or multi-ethnic individuals at 4.1% (up from 3.1% in 2020), and 2% for other ethnicities (up from 1.8% in 2020). Racial and ethnic diversity has also risen across roles. At the C-suite level, the representation of individuals identifying as Asian and Asian-British, Black and Black-British, mixed and multi-ethnic backgrounds, and other ethnicities individuals has risen from 6.4% in 2020 to 7.1% in 2021.⁶² Among those in junior and entry-level roles, 27.1% identify as Asian and Asian-British, Black and Black-British, mixed and multi-ethnic backgrounds, and other ethnicities, up from 21.9% in 2020.⁶³ In media agencies, individuals of Asian and Asian-British, Black and Black-British, mixed and multi-ethnic backgrounds comprise 30.2% of junior and entry-level roles (an increase from 25.9% in 2020).⁶⁴ While IPA's goal of 25% racial and ethnic diversity in junior level roles has been met, they have yet to reach their goal of 15% ethnic diversity in leadership roles, and a pay gap favouring white individuals has increased, from 19.5% in 2020 to 21.2% in 2021.⁶⁵ Further, this gap is higher in media agencies compared to creative and other non-media agencies (23.4% vs. 15.3%).⁶⁶

In many cases, intersectional representation has also increased from 2020 to 2021. Among ANA overall membership, the percentage of African American/

Black women has risen from 6% to 6.3%.⁶⁷ Similarly, the representation of Asian women has increased from 9% to 9.8%, while the representation of Hispanic/Latino women has stayed the same at 8%.⁶⁸ AIMM has also begun collecting data on the representation of American Indian/Alaskan Native and Native Hawaiian/ Pacific Islander women, with both groups representing 0.1% each in 2021.⁹ Among CMO/CMO-equivalents at ANA's U.S. client-side marketer companies, African American/Black women represent 3.3% (down from 4% in 2020), Asian women represent 5.6% (up from 5% in 2020), and Hispanic/Latino women represent 4.7% (up from 3% in 2020).⁷⁰

In terms of sexual orientation, 94.7% of surveyed individuals across ANA overall membership identify as heterosexual, while 4% identify as gay or lesbian, 1.2% identify as bisexual, and 0.1% identify as having another sexual orientation.⁷¹ While data on the representation of the "LGBTQ" community and people living with disabilities were not included in the results of U.S.-based marketing departments of ANA board of directors and member company findings, more companies in 2021 provide the option for individuals to self-identify within the survey.⁷² On the other hand, fewer companies provided employees the option to self-identify as living with a disability than in 2020.⁷³



Fostering inclusive workplaces

According to the global Reykjavik Index 2021-2022, the media and entertainment industry remains the sector perceived to be the most suitable for gender equality among G20 countries in leadership.⁷⁴ Despite global perceptions, updated findings since the first State of the Industry Report highlight the persistence of negative perceptions of workplace inclusion among women, as well as other under-represented individuals and groups.

Inclusive workplace cultures play a significant role in employee recruitment and retention. Among those surveyed in the U.S. more broadly, 60% of individuals stated they would not work for an organization that does not speak out against racial injustice or have left their job due to a failure to address racism.⁷⁵ This represents a two-point increase from April 2021 to April 2022.⁷⁶ 58% agree that an inclusive work culture with a strong, well-supported diversity program is important for attracting and retaining talent, representing a four-point increase from 2021.⁷⁷ Further, employees who responded that their employer has made *a lot* of meaningful progress in addressing racism and racial inequities in the workplace were significantly more likely to want to continue working for their employer for many years, compared to those who responded that no progress has been made.⁷⁸

Although slight increases in the representation of women and diverse ethnic and racial groups have occurred across the advertising industry, the need for intentional efforts aimed at fostering inclusive and equitable workplaces remains strong. According to the WFA *Global DEI Census 2021* survey of agencies, media owners and advertisers across various levels of seniorities, disparities in workplace treatment and negative perceptions of inclusion persist.⁷⁹

Among those surveyed, 47% of women with children aged 16 and under believe that family status, including whether an individual has caregiving responsibilities, has hindered their career progression, compared to 22% of men.⁸⁰ Findings also differ between markets – Spain, Ireland, and Japan represent markets with the highest gaps between women and men’s perceptions.⁸¹ In Australia in particular, findings from a 2021 *ShEqual Snapshot Report* highlight that only

29% of women surveyed believe that the Australian advertising industry prioritises gender equality as a workplace issue (compared to 54% of men), and 86% of women surveyed believe that men are paid more than women in similar roles in the industry (compared to 56% of men).⁸² Many are also deterred from speaking on gender equality issues in the workplace for fear of negative consequences (46% of women vs. 17% of men).⁸³

Disparities exist among individuals of different ethnicities, abilities, sexual orientations, and ages. 31% of “ethnic minority” individuals surveyed by the WFA’s Global DEI Census reported being unfairly spoken over (compared to the global average of 22%) and 37% reported feeling undervalued compared to colleagues of equal competence (compared to the global average of 29%).⁸⁴ The gap is narrower among those who believe that people take sole credit for shared efforts, with 30% of “ethnic minority” individuals and 32% of the global average indicating such.⁸⁵ 60% of surveyed individuals with a disability reported a sense of belonging in their organization compared to 73% of individuals without a disability.⁸⁶ Differences exist across markets, with large differences in reporting obstacles to career growth between people living with disabilities and people living without disabilities in the Netherlands, Colombia, and Portugal.⁸⁷ Among surveyed lesbian, gay, bisexual, and queer individuals, 35% reported feeling anxious in their jobs compared to 27% of heterosexual individuals.⁸⁸ In terms of age, 27% believe that their company does not treat all employees equally regardless of age, and 36% of individuals believe age can hinder one’s career at their company, with respondents in Ireland, Spain, Colombia, France, the U.S., and Canada representing the highest levels of agreement.⁸⁹

An intersectional analysis reveals stark differences in feelings of belonging in the workplace. Among those studied globally, 75% of men and 70% of women reported feeling a sense of belonging, however among people living with disabilities, these scores drop to 65% of men living with disabilities and 57% of women living with disabilities.⁹⁰ Among individuals surveyed in France, 78% of men and 68% of women reported feeling a sense of belonging, however among “ethnic minority” individuals, 70% of “ethnic minority” men and 54% of “ethnic minority” women

report a sense of belonging.⁹¹ In Canada, 76% of surveyed white women reported a sense of belonging compared to 54% for Black women.⁹²

Employee optimism in company efforts to address inequalities in the workplace remains low as well. Broadly across the U.S., 52% of employees surveyed in 2022 do not see their company making much progress in addressing racism and racial inequity at work.⁹³ Granular survey findings highlight that 65% of Asian individuals, 62% of Black individuals, 50% of Hispanic individuals, and 46% of white individuals believe in this lack of progress.⁹⁴ Many cite multiple reasons for these beliefs, including that efforts have not been taken because no one at their company is

tasked with leading diversity, equity, and inclusion initiatives, the belief that many employees are concerned diversity, equity, and inclusion initiatives would exclude them, and that executive individuals do not prioritize eliminating racial injustices, among other reasons.⁹⁵ Within the advertising industry in particular, the WFA *Global DEI Census* indicates that in 15 of the 21 markets studied where ethnicity was measured, “ethnic minority” individuals were less convinced that their organization is actively taking steps to be more diverse and inclusive than their “ethnic majority” counterparts, with large perception gaps between groups in Malaysia, South Africa, and the U.S.⁹⁶

Examples of Change – 2021-2022

The 2020-2021 State of the Industry Report recommended that companies undertake intentional efforts to collect disaggregated data on employee representation and diversity; develop clear policies on company commitments to diversity, equity, and inclusion; develop strategies for inclusive recruitment, retention, and promotion, as well as mentorship and sponsorship opportunities; and overall efforts for increasing employee inclusion and a sense of belonging in the workplace.⁹⁷ Since the first State of the Industry Report, many organizations and companies are making meaningful strides to support staff in all their diversity, namely through data collection and monitoring representation internally, as well as building on and/or creating new strategies and commitments for change.

Data collection and expansion

Companies continue to act on established goals and collect disaggregated data to promote transparency and better understand gaps in diverse representation and equal pay across levels of company seniority.

- Grupo Boticário has worked towards company goals of gender parity in its corporate workforce.⁹⁸ The company has established specific strategic priorities per year, focusing on gender equality in 2020, racial equality in 2021, supporting the “LGBTQIA+” population in 2022, a focus on generations in 2023, and supporting people living with disabilities in 2024.⁹⁹ By 2023, Grupo Boticário aims to have 50% of all employees to be Black (to better reflect the composition of the population in Brazil), with a goal of 25% of corporate leadership roles to be held by Black employees, and by 2025, aim to ensure that women comprise 50% of board positions.¹⁰⁰ Further, by 2030, the company aims to increase the representation of “minority groups” in leadership, ensure that 100% of products are made with the participation of “minority groups,” measure and increase the quality of life of resellers, and ensure that communication meets the needs of the Brazilian population, among other efforts.¹⁰¹

- Publicis Groupe released its U.S. employee diversity data, indicating that the representation of people of colour now represent 34% of the workforce with a 17.5% year over year increase.¹⁰² Strides have been made across different positions in the U.S. workforce – the representation of people of colour has risen by 22%, 15%, and 19% in entry level, mid-level, and senior leadership roles respectively.¹⁰³ Publicis Groupe further collects more granular identity-based data to understand the representation of Black, Asian, and Hispanic individuals across the company’s U.S. workforce.¹⁰⁴
- Meta continues to work towards established goals, including striving for gender parity within the company’s global workforce and achieving 50% of “under-represented minorities,” including people with two or more ethnicities, people living with disabilities, and veterans in the U.S. by 2024; doubling the number of women employees globally and doubling the number of Black and Hispanic employees in the U.S.; and increasing the number of people of colour in leadership in the U.S. by 30%.¹⁰⁵ While the overall global representation of women has decreased 0.3% from 2020 to 2021, Meta has seen a slight increase in the global representation of women in tech, non-tech, and leadership roles.¹⁰⁶ In the U.S. in particular, the representation of Black, Asian, and Hispanic individuals has both risen overall and in leadership roles.¹⁰⁷
- Kantar’s *Diversity and Inclusion* report highlights changes in gender representation across the company from January to December 2021. Women comprised 51% of Kantar’s global workforce as of December 2021, and while this represents a 3% decline since January 2021, within senior level roles, representation increased from 39% to 41% between January and December 2021.¹⁰⁸ Further, the percentage of individuals selecting “non-binary” or “prefer not to say” increased by 4%.¹⁰⁹

Expanding data collection

Ongoing efforts to monitor diverse representation across all company levels have also expanded to include other individuals and identities. In 2021, AIMM expanded its data collection efforts to include information on individuals identifying as non-binary, with findings highlighting that non-binary individuals make up 0.1% of those in U.S.-based marketing departments of ANA board of directors and member companies.¹¹⁰ Further, 0.3% of non-binary individuals were found in admin/clerical/support roles, and 0.3% are represented in senior-level roles.¹¹¹ Additionally, AIMM extended data collection to include American Indian/Alaskan Native and Native Hawaiian/Pacific Islander individuals across ANA overall membership and across those U.S.-based marketing departments of ANA board of directors and member companies.¹¹² The extension of identity groups in data collection paints a more complete picture, allowing companies to better understand the full extent and scope of diversity within their organizations, to then better craft initiatives and strategies to support employees in all their diversity.

Strategies and commitments

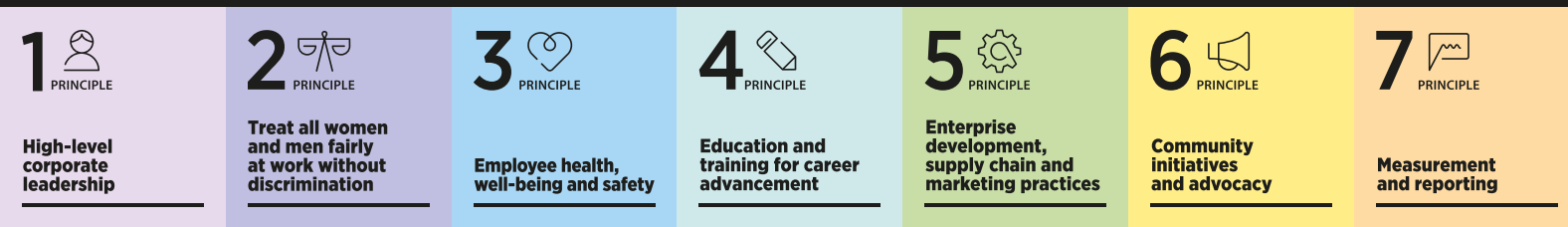
Progress has been made in the form of new pledges and strategies to support diversity, equity, and inclusion in the workforce, as well as positive developments towards existing commitments:

- Guinness Nigeria's 2022 *Annual Report and Financial Statements* outlined the company's ongoing commitment to employee wellness, anti-harassment, family-friendly policies, initiatives to support women's networks, and others.¹¹³ While women account for only 28% of the company's workforce, they also accounted for 55% of new hires in 2022.¹¹⁴ The company also onboarded its first all-women graduate trainee program aimed at helping young individuals develop work and managerial skills and hosted its first diversity and inclusion press briefing to share company progress and ongoing and future commitments for change.¹¹⁵
- Havas Group implemented many notable initiatives as part of its action plan for diversity, equity, and inclusion in 2021.¹¹⁶ The expansion of employee resource groups included a Women's Network and two new groups on race and disability; launching Level Up, a new management program aimed at women and "ethnic minority" middle managers looking to progress into senior management roles; and opening their first funding round for Black-owned start-ups in the tech and media space as part of their Havas Boost program.¹¹⁷ Looking ahead, Havas Group has pledged to launch more inclusive family planning and support policies to support the retention of mothers and encourage fathers to take on childcare responsibilities, expand the Havas Boost program, and others.¹¹⁸
- The *All In* campaign developed in 2020 by the U.K. Advertising Association, IPA and ISBA to support diversity and inclusion in the advertising industry has unveiled three new actions in January 2022 to better the representation and experiences of women, Asian individuals, and older individuals.¹¹⁹ This includes encouraging companies to use the Flexible First checklist to evaluate their policies, structures, and support systems related to flexible working.¹²⁰ The goals also encourage companies to utilise a guide developed by the All In Asian Working Group, as well as implement the Shared Experiences policy aimed at supporting older individuals.¹²¹ In June 2022, the campaign added an additional three goals, covering mental health, "LGBTQ+" inclusion, and supporting individuals living with physical disabilities.¹²²



Commitment to gender equality – the Women’s Empowerment Principles (WEPs)

Companies across the advertising industry continue to show their commitment to gender equality by signing on to the Women’s Empowerment Principles (WEPs). The WEPs are a set of principles offering guidance to businesses on promoting gender equality in the workplace, marketplace, and community.¹²³ As of October 2022, among companies that specified their sector as “advertising” upon sign-on, 288 companies globally have signed the WEPs (up from 265 signatories at the end of 2021). Among Unstereotype Alliance member states in particular, 137 companies specifying their sector as “advertising” are WEPs signatories (up from 131 signatories in 2021). At the time of sign-on, 22 companies specifying their sector as “advertising” across Unstereotype Alliance member states had a gender action plan to demonstrate their concrete commitment to gender equality in the world of work.



Recommendations

- Promoting diversity, equity, and inclusion requires a whole-of-company approach, embedding the values at all company levels and cross cutting all company initiatives. Companies can rely on the Women’s Empowerment Principles framework to guide meaningful actions for change along pillars that include high-level corporate leadership, HR efforts and treating all individuals fairly, employee health and wellbeing, and opportunities for career advancement and skills development including mentorship opportunities.
 - Organizations can refer to the WEPs report *Understanding Intersectionality: Targeting all Forms of Discrimination in the World of Work* for additional insights on supporting efforts through an intersectional lens.¹²⁴

- Continuous disaggregated data collection is needed to identify improvements in representation, as well as persistent gaps across all levels of a company. Where possible, expanding data collection efforts to include individuals and communities not currently monitored (e.g. people living with disabilities, non-binary individuals, people of various racial and ethnic groups not currently monitored, etc.) is recommended, along with monitoring the impacts of specific company initiatives.
- Quantitative data can be coupled with qualitative, perception-based data collection to understand perceptions of inclusion and belonging within a company.
- Policies focused on diversity, equity, and inclusion, as well as tangible commitments and strategies for supporting individuals in all their diversity are needed to ensure progress and promote transparency and accountability.
- Companies should meaningfully embed diversity, equity, and inclusion efforts and goals into talent recruitment, hiring, promotion, and retention strategies. This includes mitigating and removing biases within job postings and descriptions, ensuring hiring and recruitment processes are accessible, engaging a diversity of networks to seek talent, providing mentorship and professional development opportunities, and others.¹²⁵
- Sustain efforts for continuous learning and awareness raising across the company, and ensure training is provided on unconscious bias, microaggressions, discrimination, and others. Additionally, as new research and information becomes available, it is crucial that resources, materials, trainings, and data collection are updated accordingly to reflect changes within the diversity, equity, and inclusion ecosystem. This includes remaining up to date on language, terminology and recommendations for supporting women and under-represented individuals/groups.



2

Achieving unsteretyped advertising



MoMo Productions/DigitalVision via Getty Images

Progress since the State of the Industry Report 2020-2021

The limited presence of under-represented individuals/groups in ads and on-screen roles, as well as traditional portrayals of women in particular was exacerbated amid the COVID-19 pandemic.¹²⁶ The 2020-2021 State of the Industry Report highlighted women's limited speaking opportunities and their over-representation in traditional gender roles.¹²⁷ Furthermore, consumers reported grievances with the stereotyped portrayals of individuals in ads.¹²⁸ Since the first State of the Industry Report, strides

have been made to increase the presence of women and individuals of different racial and ethnic identities in ads, however, representation of the LGBTQ+ community, people living with disabilities, and people of different ages and body types remains low, and stereotyped portrayals of women, men, and under-represented groups persist across ads studied. Moreover, country-specific findings reveal granular nuances, progress, and also room for improvement in both presence and portrayals.

Diversity of presence of women and under-represented individuals in advertising

The gap in gender presence in ads is slowly closing. Findings from the Unstereotype Alliance's 2021 Unstereotype Metric highlight that the presence of women in ads across 70 countries surveyed has increased, from 47% in 2020, to 53% in 2021.¹²⁹ This increase can be seen among both Unstereotype Alliance members and non-members, however the presence of women is greater among the former (55% compared to 51%).¹³⁰ Across markets, the presence of women is higher than that of men in Argentina, Australia, Brazil, India North, India Tamil Nadu, Japan, Kenya, Mexico, Nigeria, South Africa, Türkiye, the U.K., and the U.S.¹³¹ Further, in ads featuring both women and men, the prominence of women has increased.¹³² Unstereotype Metric findings from 2020 indicate that, in ads studied with both women and men present, 57% had an equal role,

while 23% had men in a prominent role, and 20% had women in a prominent role.¹³³ Findings have shifted in 2021, with 53% indicating equal prominence, 21% with men in a prominent role, and 26% with women in a prominent role.¹³⁴ Findings from the Geena Davis Institute on Gender and Media and Cannes Lions report *The Purpose Driven Progress: Advancing On-Screen Diversity and Inclusion Through Accountability* highlight similar improvements in gender presence. The presence of women in surveyed Cannes Lions Film and Film Craft Creative Work is at its highest in 2021 (compared to previous years dating back to 2006).¹³⁵ The gender gap between men and women in these Cannes Lions categories has fluctuated over the years, however between 2020 and 2021, the presence of women has risen from 43.2% to 47.6%.¹³⁶

2021 Türkiye Effie Awards Findings

The latest Effie Awards Türkiye Gender Equality Report analyzes a total of 296 television advertisements.¹³⁷ Since 2018, female leads in the Effie winner and finalist TV ads had shown significant progress.¹³⁸ 2021 results reveal that more than half of the TV ads (53%) present a female lead (vs. 35% in 2018).¹³⁹ Findings also indicate an effort to break free from biases and stereotyped portrayals. This progress is most visible in the banking and finance category – where men are typically over-represented – where the representation of women has risen from 29% in 2020 to 54% in 2021.¹⁴⁰ In the household cleaning category – where women are often over-represented – the representation of male leads has risen from 29% in 2020 to 50% in 2021.¹⁴¹ Additionally, the representation of women in the workplace reflects an upward trend – from 16% in 2020 to 24% in 2021, and the presence of career women has almost doubled, from 9% in 2020 to 20% in 2021.¹⁴² Despite these improvements, men continue to dominate ad voiceovers. Only 1 out of 4 Effie TV ads use female voiceovers and it remains the same since 2019.¹⁴³

In addition to the general increase in the presence of women in advertisements, women are increasingly given speaking lines. Findings from the Unstereotype Metric highlight that across ads studied, the gender gap between women and men's speaking lines has closed slightly, with 42% of ads featuring women with speaking lines in 2020 and 43% in 2021.¹⁴⁴ Conversely, the percentage of ads featuring men with speaking lines has dropped from 29% in 2020, and 25% in 2021.¹⁴⁵ Geena Davis Institute on Gender and Media and Cannes Lions findings highlight a similar increase in speaking roles for women. The percentage of screen time and speaking time for women is the highest it's been since 2006, with women's speaking time in particular increasing from 42.3% in 2020 to 44.3% in 2021.¹⁴⁶

The presence of individuals of different racial and ethnic groups has also increased between 2020 to 2021. Findings from the 2021 Unstereotype Metric report reveal that across ads studied, 35% included a mixture of individuals of different ethnic origins and skin colours (up from 22% in 2020).¹⁴⁷ Additionally, racial representation in Cannes Lions Film and Film Craft Creative Work has increased, with people of colour now representing 54.6% of all characters (up from 40.6% in 2020).¹⁴⁸

Conversely, the presence of members of the LGBTIQ+ community in ads remains low and has decreased from 2020 to 2021. According to the 2021 Unstereotype Metric, the percentage of ads studied including individuals part of the "LGBTQ" community has decreased from 5% in 2020 to 1% in 2021.¹⁴⁹ Similarly, findings from The Geena Davis Institute on Gender and Media and Cannes Lions highlight that the presence of members of the "LGBTQIA+" community has fallen slightly, from 3% in 2020 to 2% in 2021.¹⁵⁰ However, findings indicate that the representation of non-binary individuals has risen slightly, from 0.1% in 2020 to 0.4% in 2021.¹⁵¹

The presence of people living with disabilities also remains low, with 2% of ads studied including people living with disabilities in both 2020 and 2021 according to Unstereotype Metric findings,¹⁵² and although the presence of characters with disabilities in Cannes Lions Film and Film Craft Creative Work has risen from 0.3% to 1.3% from 2020 to 2021, this representation remains significantly low in general.¹⁵³

Across Cannes Lions Film and Film Craft Creative Work, 5.6% of individuals were categorized as having a larger body type (up from 5.2% in 2020).¹⁵⁴ Unstereotype Metric data indicates that from 2020 to 2021, the presence of women and men with diverse body types has decreased – 22% of ads studied showed women with diverse body types in 2020 compared to 21% in 2021, and 25% showed men with diverse body types in 2020 compared to 21% in 2021.¹⁵⁵

Unstereotype Metric findings indicate that while the presence of men aged forty and older has stayed similar from 2020 to 2021, the presence of women aged forty and older rose, with 21% of ads studied showing women aged forty and older in 2021 (up from 12% in 2020).¹⁵⁶ On the other hand, Geena Davis Institute on Gender and Media and Cannes Lions findings highlight the representation of those aged sixty and older has dropped, from 8.3% in 2020 to 6.2% in 2021.¹⁵⁷

Intersectional presence is necessary for depicting people in all their diversity. In fact, the Unstereotype Alliance's Beyond Gender 2 report highlights that in Türkiye and the U.K., intersectional representation in ads made individuals feel closer to brands.¹⁵⁸ Findings from the Geena Davis Institute on Gender and Media and Cannes Lions on intersectional presence in Cannes Lions Film and Film Craft Creative Work finds that women characters that are also "BIPOC" (Black, Indigenous, and people of colour), "LGBTQIA+," living with disabilities, aged sixty and older, and with larger body types represent 55.6%, 1.4%, 1.6%, 5.7%, and 4.5% respectively.¹⁵⁹



Sarah Waiswa/Moment via Getty Images

Diversity across markets

The realities of diverse on-screen presence vary across markets around the world. Unstereotype Metric findings indicate that the lack of ethnic diversity across studied markets is most prominent in India, China, and Greece.¹⁶⁰ Individuals living with a disability are represented most in Canada and Mexico.¹⁶¹ Women with diverse body types are less likely to be seen in ads in Japan and Taiwan, and men with diverse body types are more likely to be seen in ads in Brazil and South Africa and less likely in Japan and Taiwan.¹⁶² In terms of age, people aged forty and older are more likely to be seen in ads in Canada and the U.S.¹⁶³

Progressive portrayals in ads

Consumers continue to state the importance of progressive portrayals in advertising. 72% of individuals surveyed in the UM and Unstereotype Alliance *Women and Heritage* study indicating they would buy from brands and companies that show their ethnic group in a positive and authentic way.¹⁶⁴ Further, when responding to the question of what constitutes a positive image of women characters that sets a good example for others, findings from the Unstereotype Metric indicate that women shown as confident and with personality have risen in importance from 2020 to 2021 across ads studied.¹⁶⁵

Nevertheless, individuals continue to perceive the portrayal of women and men in advertising as depicting and perpetuating traditional gender roles. According to a global survey conducted by Kantar for UN Women and the Unstereotype Alliance, almost 70% of surveyed individuals in Brazil believe that women are portrayed in media as wives, mothers, or caregivers, while 72.5% believe that men are shown in positions of authority including as providers for the family, leaders, or businessmen.¹⁶⁶ In India, these figures rest at 87.4% and 86.3% respectively; in Japan 64.7% and 66%; in Kenya 73.7% and 78.9%; in Mexico 67.2% and 67.9%; in Nigeria 80.9% and 81.2%; in South Africa 73.5% and 71.8%; in Türkiye 60.8% and 64.4%; and in UAE 74.5% and 78.9%.¹⁶⁷

Similarly, findings from the *ShEqual Snapshot Report* reveal gaps in women and men's perceptions of the prioritization of gender equality in advertising, as well as hesitation among individuals in speaking out against gender equality issues in advertising.¹⁶⁸ In fact, 32% of women surveyed believe that the advertising industry in Australia prioritises addressing gender equality in advertising content (vs. 47% of men), and 38% of women surveyed were concerned about negative consequences of speaking out against gender equality issues in advertising content (vs. 19% of men).¹⁶⁹

Similarly, perceptions of the progressive portrayals of individuals from different ethnicities remains negative. According to the UM and Unstereotype Alliance's *Women and Heritage* report of women across the U.K., 26% of those surveyed state that people from their particular ethnic group tend to be represented negatively in advertising, while 39% said neutral and 36% said positively.¹⁷⁰ Negative perceptions in the ways in which people from the respondent's ethnic groups are portrayed were the highest among Middle Eastern women (31%) followed by Black Caribbean women (29%).¹⁷¹ When accounting for intersectionality, findings indicate that 51% of women of "minority ethnic heritage" who are also part of the LGBTIQ+ community, 45% of women of

“minority ethnic heritage” living with a disability, and 42% of women of “minority ethnic heritage” who are religiously engaged believe individuals like them are portrayed negatively in advertising.¹⁷²

Findings from an analysis of ads globally using the Unstereotype Metric indicates the persistence of stereotypes and traditional portrayals in ads. Within ads measured, only 8% of women characters were shown non-traditional roles (vs. 9% of men), with minimal changes between 2020 and 2021.¹⁷³ This indicates that both women *and* men continue to be portrayed in traditional, stereotyped ways. Further, while women’s presence has increased

across categories like the vehicle & automotive and appliances & tech sectors, women are still heavily represented in the personal care/toiletry sector.¹⁷⁴ Findings from *The Purpose Driven Progress: Advancing On-Screen Diversity and Inclusion Through Accountability* report highlight that while gaps have narrowed in the portrayal of men and women in an occupation, in positions of authority and as leaders between 2020 to 2021, men continue to be portrayed more often in these roles/ways compared to women.¹⁷⁵ Similarly, the portrayal of women in revealing clothes continues to be markedly higher than men (5% vs. 1.9% in 2021).¹⁷⁶

Findings from the Advertising Standards Council of India (ASCI)

According to the recent *GenderNext* study of over six hundred ads across India developed by the Advertising Standards Council of India (ASCI) and Futurebrands,¹⁷⁷ many brands in India have made progress towards showing individuals of different physicalities and beauty brands in particular are making an effort to showcase less discriminatory, more inclusive portrayals of beauty.¹⁷⁸ On the other hand, stereotypes and tropes persist, including the sexualization of women in advertising, including sexual innuendos in food ads, the depiction of women as the keepers of the home,¹⁷⁹ depictions of women as bearers of emotional burden, women shown as free to do more but not less (e.g. women shown as entrepreneurs while still depicted as the keepers of the home thus fueling depictions of the over-burdened, over-worked woman), the dramatization of women’s struggles with little time shown for their accomplishments, expectations of femininity, and others.¹⁸⁰

According to *The Purpose Driven Progress: Advancing On-Screen Diversity and Inclusion Through Accountability* report by the Geena Davis Institute on Gender and Media and Cannes Lions, gaps persist in the roles and activities of people of colour in ads.¹⁸¹ 2021 findings indicate that people of colour were more often portrayed as socially engaged and physically active than white characters, yet were less often shown working in an office (11.1% vs. 16.7%) or in positions of authority (1.6% compared to 3.2%).¹⁸²

“LGBTQIA+” characters were more likely to be shown socializing (72.2% vs. 45.4%) and, while gaps in the depiction of “LGBTQIA+” and “non-LGBTQIA+” working have narrowed between 2020 and 2021, members of the community were less likely than “non-LGBTQIA+” individuals to be shown working (11.1% vs 21.9%).¹⁸³

For people living with disabilities, findings were not included due to small sample sizes.¹⁸⁴ Individuals aged sixty and above were more likely to be shown cooking (4.2% vs. 1.5%) and socializing (53.3% vs. 45.4%), yet were less likely to be shown exercising (6.7% vs. 15.2%) compared to individuals under the

age of sixty.¹⁸⁵ As for people with larger bodies, no significant differences in depictions of authority, activity, or personal attributes were found, however people with larger bodies were less likely to be shown at a sporting event than those without a larger body type (3.4% compared to 8.1%).¹⁸⁶

Examples of Change – 2021-2022

The State of the Industry 2020 – 2021 Report recommended that companies move beyond gender to support individuals in all their diversity, as well as take accountability for diversity, equity, and inclusion in all levels of the creative process – from suppliers to casting to ad execution.¹⁸⁷ The report further recommended the collection of disaggregated data to better understand gaps and disparities in on-screen representation and portrayals.¹⁸⁸ Since the first iteration of the report, many companies and brands have made progress in establishing benchmarks and expanding data collection on the inclusion and progressive portrayals of women and under-represented individuals/groups in ads, developing guidelines and resources for supporting diversity, equity, and inclusion in advertising, and promoting goals and values through supplier diversity and adequate budgeting.

Ongoing data collection

Benchmarking, continuous tracking of diversity as well as perceptions of inclusion and belonging in advertising, and regular reporting on findings are critical for building widespread awareness, targeting existing gaps in representation, and holding companies accountable in their efforts. In partnership with Kantar, the Unstereotype Alliance will expand the Unstereotype Metric to systematically measure progressive portrayals, beyond the representation of gender in ad content. The extension of the Unstereotype Metric will include further dimensions including race and ethnicity as well as age and disability and will be launched in 2023.

Many companies are conducting audits on presence and progressive portrayals within their own ads, providing insight and opportunities for further improvement. In 2022, Mars Incorporated published an audit tracking of representation in their 2021 ads and analyzing progress since 2018 findings.¹⁸⁹ The presence of women in Mars ads rose 11 percentage points between 2018 and 2021, and key improvements also include no gaps in the portrayal of men and women at work and equal likelihood of men and women being shown in leadership roles and equal screentime between men and women.¹⁹⁰

Others are conducting meaningful research to better understand the state of diversity and inclusion more broadly throughout the advertising industry. In 2022, Getty Images released *A New Era in Sports: The Demand for Intersectional Gender Representation for Women and Girls*, which analyzes the representation of women, non-binary and transgender individuals, people of colour, and individuals living with disabilities in sports media and advertising.¹⁹¹ Models Trust, a non-profit organization aimed at ensuring safe and equitable environments for talent, published their Model Agency Performance 2021 report on model perspectives and feelings of inclusion in the industry.¹⁹² Further, the organization published the 2022 report *Benchmarking Agencies Worldwide*, which highlights the need for additional efforts to promote diversity and inclusion for models and within agencies.¹⁹³



Pledges and partnerships

Organizations and companies are joining forces to tackle bias in media and pledge efforts for diversity, equity, and inclusion in marketing. Unilever launched the Act 2 Unstereotype initiative to promote structural change within the industry.¹⁹⁴ Through the initiative, Unilever and the company's brands will work towards the following efforts: embedding diversity, equity, and inclusion throughout the end-to-end marketing process including within consumer insights, brand proposition, marketing mix development and creative development, and inclusion behind-the-scenes and on-screen portrayals; developing an Unstereotype Charter with clear commitments for diversity, equity, and inclusion; increasing representation both on screen and behind the scenes; and eliminating digital manipulation of individuals including adapting body type, skin colour, and others.¹⁹⁵ Further, Delta Airlines, WPP, Mindshare, 4A's, The Interactive Advertising Bureau (IAB) and the Ad Council have pledged to act against the biases embedded within the algorithms powering online advertising.¹⁹⁶ This pledge aims to ensure that algorithms are not unfairly using stereotypes related to gender, race, and other identity markers to determine which individuals see which ads.¹⁹⁷

Many organizations and brands are expanding upon existing initiatives to ensure wider reach. The *Change the Lens* pledge, calling for a target of 15% or more Black people across various production roles in the U.S. and London, U.K., aims to promote inclusion at all levels of the creative process including casting.¹⁹⁸ Originally aimed at production companies, talent agencies, and individuals including directors, producers, and department heads, the effort has since expanded to include advertising agencies, with Publicis Groupe becoming the first agency to take the pledge.¹⁹⁹ Similarly, the Global Alliance for Responsible Media (GARM) recently expanded its membership to include independent brand safety solutions providers, as well as advertisers, media agencies, media platforms, and industry associations.²⁰⁰ Through this expansion, GARM will develop a Solutions Developers Working Group aimed at enhancing industry transparency, consistency, and quicker speed-to-market for GARM standards and solutions.²⁰¹

Recognizing the necessity to support and nurture the talent pipeline, others are developing partnerships to support outreach efforts and build the pipeline of future talent to ensure that women and under-represented individuals/groups have opportunities to pursue a career in the industry. Unstereotype Alliance South Africa members Loeries and Meta Africa and the UN Women South Africa Multi-Country Office has launched the Loeries Youth Committee Mentorship Programme.²⁰² As part of an overall effort to support diversity, equity, and inclusion in the industry, the programme aims to provide mentorship to 15 selected young professionals from the brand communications industry to inspire and guide the new generation of individuals working in the industry.²⁰³ Similarly, WPP continues to make strides as part of its 2020 pledge to invest \$30 million in three years to fund inclusion programmes and provide support to external organisations.²⁰⁴ In September 2021, WPP launched nine new projects to form part of the Racial Equity Program, including increasing career opportunities in the creative space for Black and brown students in Detroit, among others.²⁰⁵

Maskot/Maskot via Getty Images



Guidelines, programmes and resources

Recent efforts highlight the many organizations developing advertising guidelines and/or regulations for inclusive portrayals of individuals in all their diversity in ads:

- In June 2022, the Advertising Standards Council of India released *Guidelines on Harmful Gender Stereotypes in Advertising* focused on ensuring the unsteretyped portrayal and avoiding the sexualization of women in ads.²⁰⁶
- In 2022, Citi and Getty Images developed *Diversity, Equity, and Inclusion Imagery Toolkits* providing guidance on how to ensure authentic and multi-faceted depictions of individuals in marketing materials.²⁰⁷ The toolkits are available to support different markets including Hong Kong, Mexico, Singapore, UAE, the U.K., and the U.S. with forthcoming toolkits for Brazil, Canada, Germany, and Japan.²⁰⁸
- Published in May 2022, European Group of Television Advertising (EGTA)'s *Practical Guide to Access Services in TV Advertising* aims to support brands and advertisers to embed accessibility within their content.²⁰⁹ The guide provides information on technical supports for ensuring accessibility in advertisements, as well as current obligations.²¹⁰
- ShEqual, an initiative of Women's Health Victoria in Australia, published the *Gender Stereotypes in Advertising Guide* and highlighted six stereotyped portrayals of women and girls in media including: The Model Mother, The Passive Little Girl, The Observed Woman, The Sexualised Woman, The Pretty Face, and The Ticked Box.²¹¹ The guide provides examples of each stereotype, as well as strategies to avoid and mitigate reproducing these portrayals in ads.²¹²
- In September 2022, the U.S. National Advertising Division developed updated procedures to prohibit advertising that is "misleading or inaccurate due to its portrayal or encouragement of negative harmful stereotyping, prejudice, or discrimination."²¹³

Supplier diversity

Companies continue to recognize the importance of supplier diversity and engaging with diverse vendors as part of the creative process. Findings from ANA's 2021 *Supplier Diversity Report* highlight that, among those surveyed in the U.S., 89% indicated supplier diversity has increased in importance over the past year, citing numerous reasons for this increase including the murder of George Floyd in 2020 and the calls for social justice, as well as aligning corporate values with values of diversity and inclusion, among others.²¹⁴

This recognition is coupled with action, particularly in the form of strategy development and building curated lists of diverse suppliers. ANA findings indicate that 69% of companies surveyed in the U.S. have a supplier diversity strategy for advertising and marketing.²¹⁵ Supplier diversity strategies remain fairly new to many companies, with almost half stating that their strategy is less than five years old, and 21% stating that their strategy is less than two years old.²¹⁶ Among those studied, most companies aim to engage Black-owned businesses, women-owned businesses, and Hispanic-owned businesses

(96%, 96%, and 91% respectively).²¹⁷ This is followed by “LGBTQ+”-owned, Asian-owned, veteran-owned, and businesses owned by people living with disabilities (79%, 76%, 76%, and 72% respectively).²¹⁸ A similar commitment to action has been established among those surveyed by Connatix and DigiDay. 55% indicate that they’ve built a diverse publisher and vendor list using their in-house team; 23% have done this using both in-house and external teams, and 15% have built diverse publisher and vendor lists using external partners.²¹⁹ Only 7% had not started developing a diverse publisher and vendor list.²²⁰

Efforts for supporting supplier diversity have expanded beyond strategy and vendor list development, with AIMM developing a guide to engaging with diverse suppliers including insights on certification requirements, strategies for finding diverse suppliers, and others.²²¹ The guide acts to support both agencies/marketers and diverse suppliers in doing business with one another.²²²

Budgeting for diversity

Many companies are taking intentional steps to promote diversity, equity, and inclusion through adequate spending. Findings from a Connatix and DigiDay study indicate that 81% of respondents are pursuing diversity, equity, and inclusion goals, and concrete efforts include allocating spending for publishers and vendors owned and operated by diverse leadership (30%), spending budget to

represent diverse groups in their creative campaigns (29%), and a mix between the two (22%).²²³ 11% indicated that they plan to start allocating financial resources to one or more diversity, equity, and inclusion goals in 2022, and only 8% indicated they had no plans.²²⁴

Budget percentages earmarked for publishers owned and operated by “diverse leadership” vary. Among those surveyed in 2021, only 12% earmarked between 1% and 20% for diverse publishers, and only 4% earmarked between 81% and 100%, with most earmarking anywhere between 21% and 80% of their budget.²²⁵ Companies expect to make strides in budget allocation for 2022, with a decrease in companies allocating between 1% to 20%, 21% to 40%, and 81% to 100% of their budgets, yet an increase in companies allocating 41% to 60% and 61% to 80% of their budgets allocated to publishers owned and operated by diverse leadership.²²⁶

Companies are developing budgets to spend on diverse vendor and procurement strategies. As part of their commitment to enhance diversity and inclusion in media, Unilever spent €445 million with diverse suppliers in 2021, with an overall goal of spending €2 billion annually with diverse suppliers by 2025.²²⁷ In the U.K., Unilever has partnered with WPP, Google, and Dow to support the MSDUK Accelerator program aimed at supporting 300 “ethnic minority” businesses to become supply chain ready.²²⁸

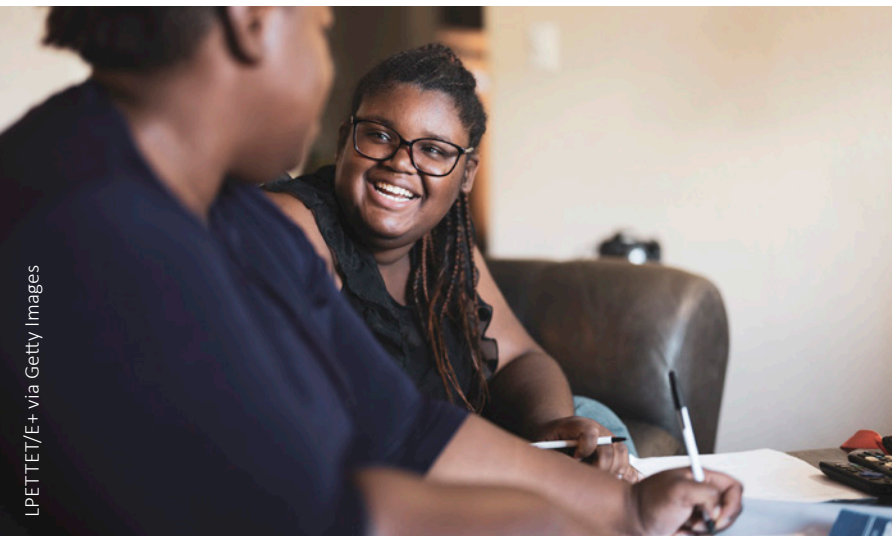


Recommendations

- Companies should continue to monitor representation in their ads and branding and sustain efforts to ensure content isn't biased, stereotyped, and tokenistic representation of individuals and communities.
 - Companies across the advertising industry can continue to expand data collection efforts to better understand both representation levels but also progressive portrayals of people of different religions, ages, body types, members of the LGBTIQ+ community, and people living with disabilities.
 - Companies can rely on existing guides and resources for information and tips for progressive portrayals. Examples of resources include: *The Inclusive Filmmaking Toolkit* created by Bus Stop Films and Taste Creative, providing organizations with guidance on ensuring the inclusion of individuals living with disabilities in ads and within the creative process,²²⁹ and the Unstereotype Metric 3P framework encouraging brands to monitor presence, perspective, and personality of individuals in ads.²³⁰
- Accessibility is of the utmost importance. This includes the representation and progressive portrayals of people living with disabilities, as well as removing accessibility-related barriers in the creative process. Companies should abide by accessibility obligations and provide technical support and functions to ensure that ads and media are accessible and enjoyable to individuals living with disabilities.
- Diversity, equity, and inclusion must be meaningfully embedded at all levels of the creative process. This includes eliminating biases within the casting process and ensuring diversity among the individuals developing scripts and creative concepts.
- Couple supplier diversity plans, strategies, and curated lists with adequate budget percentages and monitor spend annually.
- Companies and brands can form partnerships and synergies to achieve common goals, including forming partnerships with schools, NGOs, and others to raise awareness of career opportunities in the industry, provide mentorship and internship opportunities, and ultimately nurture the career pipeline of young women and under-represented individuals/groups.

3

Empowering public action against stereotypes



LPETITE/E+ via Getty Images

Progress since the State of the Industry Report 2020-2021

The State of the Industry 2020-2021 Report highlighted consumer demands for companies and brands to stand in solidarity with social justice movements and to couple their statements with tangible actions for change.²³¹ In many cases,

consumer expectations of brand efforts and actions remain strong, with consumers expecting brands to act on social justice efforts, to support under-represented communities through meaningful initiatives, and act authentically in all their efforts.

Consumer perceptions and expectations

Consumers continue to demand company and brand accountability for aligning with consumer values and upholding inclusive practices. The recent *Ipsos Global Trends 2021* report finds that in 2021, 60% of surveyed consumers in Great Britain, 66% in the U.S., and 61% in France believe that brands should reflect their personal values compared to 56%, 60%, and 51% respectively in 2019.²³² Further, 87% of surveyed individuals in Nigeria, 84% in India, 84% in Kenya, 84% in South Africa, 71% in Australia, 70% in Brazil, 67% in Great Britain, 62% in Mexico, and 60% in Argentina believe that business leaders have a responsibility to speak out on social and political issues affecting their country.²³³ Consumers also expect authenticity in brand action. The *Gustavson Brand Index Report* highlights a correlation between brand authenticity and overall trust, as well as links between authenticity and the likelihood of Canadian consumers to recommend the brand to others.²³⁴

Consumers also continue to take action to hold companies and brands accountable for their values. According to the fifth addition of the global Salesforce State of the *Connected Consumer* report, the percentage of surveyed consumers that indicated they stopped buying from a company whose values did not align with theirs rose to 66%, up from 62% in 2020.²³⁵ Furthermore, 88% of individuals surveyed expect companies to clearly state their values, and 73% state that company actions on racial injustices influence their decision to purchase from said company.²³⁶ Findings from Deloitte's *Global Marketing Trends* report highlight that consumers expect companies and brands to dig deeper. 57% of global respondents indicated that, in general, they are more loyal to brands that commit to addressing social inequities, highlighting the importance of not only marketing diversity and inclusion, but also meaningfully embedding these values throughout the brand's spheres of influence.²³⁷

Calls for accountability have been met with increased levels of consumer trust in brands, signalling that while consumers are holding brands accountable for their promises and actions, they have some level of faith and optimism in brand efforts and actions.

According to the *State of the Connected Consumer* report, 52% of consumers surveyed generally trust companies, an improvement from 48% in 2020.²³⁸ Consumers also have more trust in companies to tell the truth (59% in 2020 vs. 68% in 2022), make honest claims about their social initiatives (64% in 2020 vs. 71% in 2022), and act with society's best interest in mind (59% in 2020 vs. 68% in 2022).²³⁹ When considering their own company, levels of trust vary between employees – among those surveyed who believe that racism exists, Black, Hispanic, and Asian individuals indicate lower levels of trust in their employer to do what is right when it comes to responding to systemic racism and racial injustice in the U.S. compared to white individuals.²⁴⁰



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Removing harmful ads

The State of the Industry Report 2020-2021 highlighted various ads around the world that were criticized for regressive portrayals, as well as widespread re-branding of products to remove stereotyped branding. Nevertheless, harmful ads continue to be published, and consumers and standards authorities continue to hold brands accountable for swift removal of harmful ads. In fact, Ad Standards Australia received 1,133 complaints between January and June 2022.²⁴¹ The majority of complaints related to violence, sex, sexuality and nudity, and discrimination or vilification.²⁴² While not all ads were found in breach of any violation,²⁴³ the volume of complaints indicates a process whereby the public continues to hold brands accountable for their messaging.

Standards authorities continue to enforce the removal of stereotyped ads globally, while others are taking stricter measures to penalize brands for stereotyped portrayals and messaging. In 2022 a dating company ran an ad on TikTok of a woman serving her partner including making his food,

setting out laundry, and turning football on with the messaging that people should use the company to “find a keeper” similar to this woman.²⁴⁴ While the company argued that the ad was part of a broader campaign of different types of videos, when shown in isolation, the ad reproduced gender stereotypes and expectations.²⁴⁵ As a result, the U.K. Advertising Standards Authority deemed that the ad depicted an unequal relationship and negative gender stereotypes and ultimately banned the ad.²⁴⁶ The ASA also banned an ad from a fashion company for sexually suggestive content and the objectification of women, arguing that the sexual nature of the ad was not relevant to the product.²⁴⁷ Taking stricter measures, the Shenzhen market supervision and regulation bureau fined a local branch of an advertising and communication company 510,000 yuan (\$75,500) for a sexist and stereotyped ad on body hair removal for women.²⁴⁸ According to the All-China Women’s Federation of Shenzhen, the fine was in line with the city’s gender equality review guide which encourages authorities to regulate ads for sexism including sexual connotations, objectification, and depicting women in subordinate roles.²⁴⁹

Examples of Change – 2021-2022

As recommended in the first State of the Industry Report, companies continue to move beyond statements of support and couple these sentiments with initiatives to give back to communities in an effort to stand firm with social justice efforts and to support individuals/groups in all their diversity. Additionally, companies are continuing to look inwards and monitor the extent to which diversity, equity, and inclusion is supported and embraced within their own teams, and while many are stifled by fears of woke-washing and cancel culture, some companies continue to speak openly on social justice issues despite these concerns.

Standing in solidarity

Cancel culture and consumers openly and publicly shedding light on company shortcomings and holding them accountable for diversity, equity, and inclusion may impact company willingness to speak out. In fact, a recent study indicates that among U.S. brands surveyed, 55% stated they were not likely to speak out against social issues in the coming quarter, with many citing risks of being called out by

consumers.²⁵⁰ Similarly, a study of 500 U.K. in-house and agency marketing professionals indicates that many companies fear ostracization for a mistake or misstep.²⁵¹ While some view cancel culture as stifling action due to fear, others consider it a tool for under-represented individuals to hold brands accountable.²⁵²

Several notable companies refuse to let fears of cancel culture stop them from advocating for equality and speaking out against injustice. Ben and Jerry's has long been vocal in calling out racial injustice, particularly during 2020 and has since used the

brand's social media platform to include advocacy efforts related to removing barriers to voting for Indigenous communities,²⁵³ supporting career opportunities for under-represented youth,²⁵⁴ racial profiling and policing,²⁵⁵ and others.

Beyond statements

In an effort to act on consumer demands and stand in solidarity with social causes, brands walk a fine line between positive initiatives and commodification and tokenism.²⁵⁶ Similarly, efforts that are not rooted in authenticity risk being labelled as "woke-washing," a term used to label brands disingenuously using social justice movements to connect with consumers.²⁵⁷ Walmart's Juneteenth branded ice cream, for example, received backlash from consumers for the company's commodification of the holiday, which was established by the U.S. government as a federal holiday to commemorate the emancipation of slavery in Galveston, Texas in 1865.²⁵⁸

While brands continue to make statements year after year for International Women's Day, Pride Month, and other annual days and months of recognition, consumers are increasingly advocating for brands to avoid one-off efforts and instead act in more meaningful, sustainable ways. Findings from a survey of individuals across Brazil, China, Japan, the U.K., and the U.S. reveals that 78% of those surveyed believe that brands must move beyond specific events in the news and celebrations and implement efforts for long lasting support for under-represented groups. Similarly, a study by GlobalWebIndex (GWI) asking consumers across eight markets for their thoughts on Pride 2022 highlights that 67% of respondents believe that brands should support the "LGBTQ+" community year-round, 34% want brands to create an inclusive work culture to support "LGBTQ+" employees, and 29% want brands to incorporate diversity and inclusion in advertising all year.²⁵⁹

Brands are implementing efforts to avoid "woke washing" during annual commemorative days and months and are coupling their statements for Pride, International Women's Day, and other days and months of recognition with efforts to give back to

the community. For International Women's Day 2022, Hershey expanded their #HerSHE campaign to Canada, Brazil, India, Mexico, Philippines, and Saudi Arabia.²⁶⁰ The campaign wraps candy bars in packaging featuring women and their accomplishments per country on the packaging.²⁶¹ Additionally, Hershey partnered with Girl Up, donating \$100,000 to support initiatives for advancing girls' skills, rights, and leadership opportunities, as well as amplify the voices of girls and women who are making a difference on digital and social platforms.²⁶²

Others are supporting diversity, equity, inclusion, and addressing social inequality through systemic change and meaningfully embedding these values within brand strategy and development. In 2019, Dove and partners the National Urban League, Color of Change, and Western Center on Law and Poverty developed the CROWN Act.²⁶³ Recognizing the stereotypes and inequalities Black individuals, and Black women in particular, experience related to their hair and being told that their hair is "unprofessional" for the workplace, the CROWN Act coalition aims to advance anti-hair discrimination legislation.²⁶⁴ Since the coalition's inception, the Act or laws inspired by the Act has been enacted in 19 states, with Connecticut, Delaware, New Mexico, Nebraska, Nevada, Oregon, and Illinois enacting the Act or laws inspired by the Act in 2021, and Maine, Tennessee, Louisiana, Massachusetts, and Alaska all enacting the Act or laws inspired by the Act in 2022.²⁶⁵ Others are embedding the values of diversity, equity, and inclusion more meaningfully within organizational strategy. In January 2022, Mars convened the M&M's FUNd Advisory Council comprised of experts across the diversity and inclusion space to advise on M&M's brand programming related to diversity, equity, and inclusion.²⁶⁶

Coupled with meaningful actions for change is the importance of transparency in efforts. A record number of publicly listed companies in 2022 have disclosed public data on their gender-related practices and policies.²⁶⁷ In 2022, 418 companies across 45 countries and regions were represented in Bloomberg's Gender-Equality Index, including Unstereotype Alliance members Adobe, Bayer,

Diageo, IPG, L'Oreal, Mastercard, Publicis Groupe, Unilever, Vodafone, and WPP.²⁶⁸ The index provides transparency on gender-related efforts and policies among companies and scores companies along five key themes: female leadership and talent pipeline, equal pay and gender pay parity, inclusive culture, anti-sexual harassment policies, and pro-women brand.²⁶⁹

Recommendations

- Companies and brands must be authentic in their efforts to support social justice movements to avoid “woke-washing,” tokenism, and performative activism.
 - Embed social purpose within brand values and strategy to ensure it doesn't exist as an afterthought.²⁷⁰
 - Be transparent and build consumer trust. Be open about goals and progress made toward achieving them.
 - Evaluate current branding and brand strategies to identify potential biases and stereotypes.
- Brands should not shy away from speaking out for fear of cancel culture. In fact, among surveyed Gen Z individuals across Singapore, Thailand, Indonesia, and The Philippines, for example, 84% state that they would forgive and support a brand after a mistake if the brand takes accountability.²⁷¹ Brands should apologize, take responsibility, and outline actions for change.
- Stereotyped content can sometimes go unnoticed and unchecked. Regulating organizations can support with guidance, brands can recognize their mistakes, take swift action to remove harmful content, and learn from errors to mitigate similar issues in the future.
- Meaningfully support under-represented and under-served communities through donations, awareness raising efforts, community outreach, and other initiatives.

Conclusion

Efforts for stereotype-free advertising and meaningful actions to foster diversity, equity, and inclusion have been developing continuously since the inception of the Unstereotype Alliance in 2017. Now in its sixth year, the Unstereotype Alliance's membership has grown from 24 members to 240, with twelve national chapters in Argentina, Australia, Brazil, India, Japan, Kenya, Mexico, Nigeria, South Africa, Türkiye, UAE, and the U.K. Alongside extensive growth, the impact of this global collective has accelerated exponentially with more unsteretyped content recorded and indicators of progress towards accountability across the membership. With plans to extend the Unstereotype metric and create an accountability framework for members, the Alliance aims to further improve upon and implement the recommendations outlined in this report.

The Unstereotype Alliance's commitment to uncovering and addressing gaps in the representation of women and under-represented groups across the advertising industry, monitoring both presence and progressive portrayals of individuals in all their diversity in ads, and holding brands accountable for meaningful change is highlighted in the publication of the State of the Industry Report 2020-2021, and the second iteration 2021-2022.

Findings from the State of the Industry Report 2021-2022 highlight that, a year on from the report's first iteration, slight progress has been made in the representation of women and racial and ethnic diversity across the advertising industry, however, across data studied, the representation of other under-represented individuals, including people living with disabilities and members of the LGBTQ+ community remains low and/or data is simply not collected to understand representational realities and gaps. Moreover, while representation may have increased for some communities, more efforts are needed to promote inclusive workplace cultures where individuals in all their diversity feel welcome. Within ads themselves, a similar trend persists, whereby the presence of women and racial and

ethnic diversity has increased, however issues exist in the progressive portrayals of under-represented groups. Both men and women, for example, continue to be shown in traditional roles.²⁷² Finally, consumers continue to hold companies and brands accountable for striving for diversity, equity, and inclusion internally, and for speaking out against social injustice. Consumers want authentic, truthful efforts and are not afraid to use their purchasing power to signal their priorities.

The State of the Industry Report 2021-2022 further highlighted company and organization efforts for change since May 2021, including data collection both internally and externally, initiatives to support staff at all levels of the company pipeline, developing partnerships and pledges to combat stereotypes in media, producing guidelines and resources for inclusive advertising, enhancing supplier diversity, moving beyond statements, and taking action on social issues. It is evident that progress has been made, and meaningful and consistent efforts should continue in order to ensure diversity, equity, and inclusion throughout the industry.

Klaus Vedfelt/ DigitalVision via Getty Images



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