

The Global DEI Census

Diversity, Equity and Inclusion in
the Global Marketing Industry



In partnership with:



Contents

About

| | |
|-------------------|---|
| Introduction | 3 |
| Acknowledgements | 4 |
| Executive summary | 5 |
| Methodology | 7 |

Main findings

| | |
|---|----|
| A world of differences | 8 |
| The people who live the worst experiences | 9 |
| Age and family status | 10 |
| Gender and family status | 11 |
| Ethnicity | 12 |
| Disability and mental health | 13 |
| Sexual orientation and gender identity | 14 |

| | |
|--------------------|-----------|
| Conclusions | 15 |
|--------------------|-----------|

| | |
|-----------------|-----------|
| Appendix | 16 |
|-----------------|-----------|



Introduction

These findings from the industry’s first-ever global *Diversity, Equality and Inclusion Census* are important for a number of reasons.

They give us a first-ever insight into how the global marketing industry is performing on a wide range of diversity, equity and inclusion metrics.

By looking at the responses from certain groups we can shine a light on the areas we need to improve.

They highlight the differences in the experiences lived by individuals based on their race, national or ethnic origin, colour, religion, age, gender, sexual orientation, gender identity or expression, family status or disability.

Most importantly, they provide local data so that action plans can be specifically designed with local audiences and challenges in mind. It’s not from ivory towers in New York or London that meaningful and lasting change will be driven on the ground.

This baseline is timely because COVID-19 has magnified inequalities everywhere. The findings will help the industry to focus on helping to build back in a way that is more diverse, more equitable and more inclusive than before.

This is vital from both moral and business perspectives. This is how the industry will continue to attract and keep the best talent.

There is plenty of evidence that more diverse and inclusive teams create work that better resonates with diverse consumer audiences.

We plan on re-running the census in spring 2023. We hope we can count on your support then and that, together, we can measure meaningful and lasting progress.



1 in 7

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

Acknowledgements

The research questionnaire was a shortened version of one developed in the UK for the AA/ISBA/IPA-led *All In Census* led in March 2021. AA and ISBA were enormously generous in terms of sharing their learnings from the UK experience.

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

The output is in-depth insight into the lived experiences of more than 10,000 people across our industry, insights that will enable us to drive change.

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

The single biggest collaboration in the history of the global marketing industry.



Executive summary

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

What’s new about this report is that it is the first time the industry is measuring diversity, equity and inclusion, by asking about people’s perceptions of fairness and sense of belonging. And, of course, we are doing this across 27 very different countries.

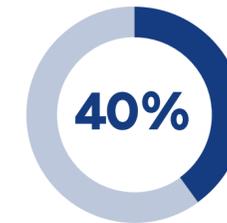
Our research has highlighted the global marketing industry’s main pain points:

- Discrimination is most commonly reported on the basis of family status (meaning caregivers for the elderly, the sick or children) and age, both of which can most often hinder women’s career progression;
- The lived experiences of women in our industry are consistently poorer than the lived experiences of men in most countries surveyed and this is more often than not compounded by a gender pay gap particularly for women in more senior roles;
- The lived experiences of ethnic minorities are notably poorer than their ethnic majority counterparts and this reduces sense of belonging and career progression;
- Indications are that people with disabilities are under-represented in the industry. A high proportion (71%) who identify as disabled report mental/cognitive disabilities but relatively few (44%) inform their employer; and
- A third of total respondents (33%) currently report feeling stressed and anxious at work.

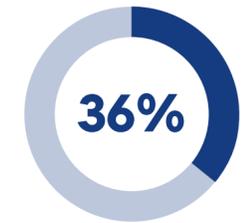
Women score lower on the Inclusion Index

61%
Women

69%
Men



40% of women say family status can hinder one’s career



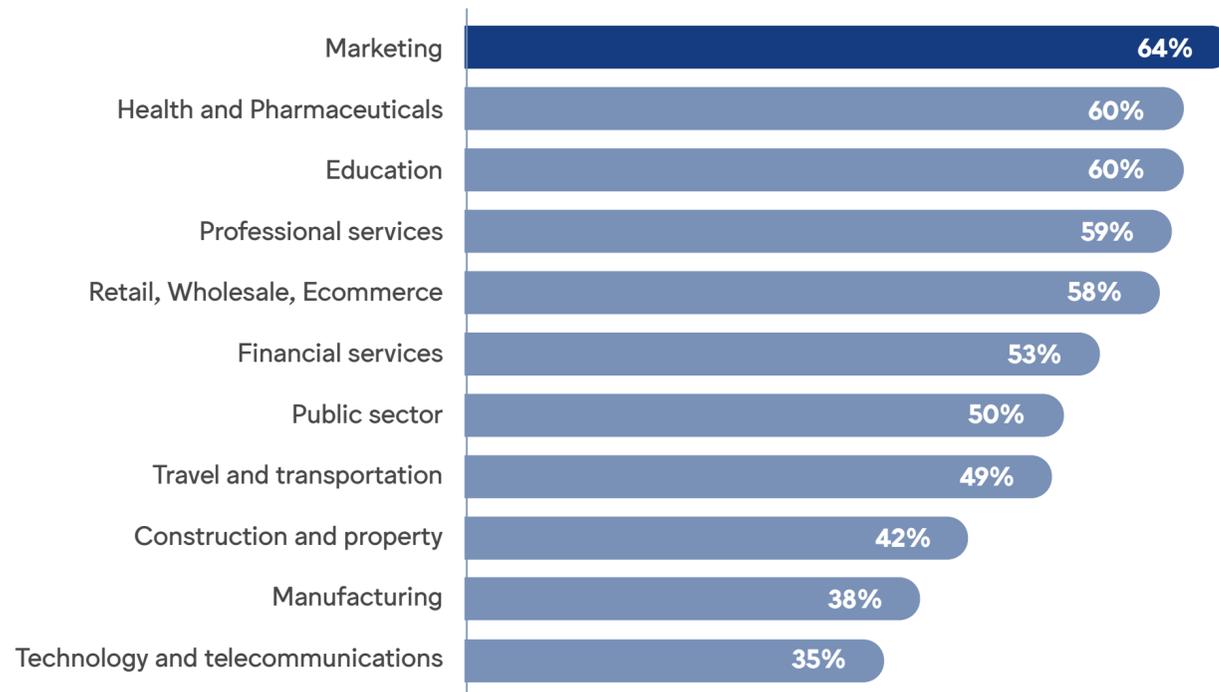
36% agree age can hinder one’s career

The most reported forms of discrimination are on basis of age, followed by family status and then gender. Often, combining these characteristics the groups feeling the most discrimination are younger or older women with care-giving responsibilities.

Marketing industry ranked above other industries measured by Kantar

Nevertheless, the marketing industry’s overall inclusion score (64%) compares favourably against other industries measured by Kantar in their 2019 Inclusion Index¹.

Inclusion Industry Index



¹ <https://www.kantar.com/campaigns/inclusion-index>

Reasons for optimism include a significant proportion (68%) who felt a strong sense of belonging to their company globally, with Sweden (76%) and Belgium and Pakistan (73%) driving some of the highest scores. Along with this, there is a high proportion of respondents (60%) saying that organisations are taking action to be more diverse and inclusive. The US (83%) and Canada (81%) lead the way here.

A key finding, however, is that there is a huge variation between the lived experiences of different groups. Women and all minority groups report poorer work experiences than men and their majority counterparts on almost every metric. For example, on Kantar’s Inclusion Index, which is generated by asking questions about people’s sense of belonging, the absence of discrimination and presence of negative behaviour, men scored at 69% compared to women at 61% globally.

Another key finding is the variation between demographics and markets. While 85% of Swedes reported feeling ‘a valued and essential part of their organisation’, other markets in Europe, Asia and Latin America reported closer to just 50% of respondents agreeing.

It is not by looking at averages that we can draw valid conclusions. It is by digging into the data and noting variations in responses that we can demonstrate the poorer lived experiences of women and/or minorities in certain markets.

The fact that 30% of respondents agree with the statement “I have observed inappropriate behaviour within my company”, that only 43% agree that the best opportunities go to the most deserving employees and that just 35% say their company provides equal pay for equal work, shows the scale of the challenge.

Just 35% say their company provides equal pay for equal work

The value of this report to employers is that it identifies where specific interventions are most needed for the industry to be more diverse, more equitable and more inclusive.

Methodology

The survey was conducted in June–July 2021 and filled in by 10,349 respondents anonymously from 27 markets in line with very different rules and regulations that govern how you can ask questions about these sensitive topics.

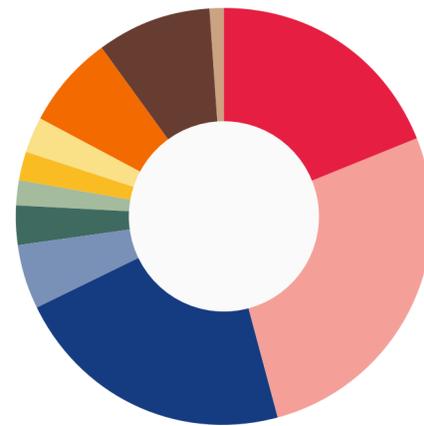
The survey was available in local languages and in English in Belgium, Brazil, Canada, Colombia, France, Greece, the Gulf Cooperation Council (Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, and the UAE), Hong Kong, SAR (China), India, Ireland, Japan, Malaysia, the Netherlands, New Zealand, Pakistan, Portugal,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

The survey looks at demographic aspects (e.g., gender, age, race, ethnicity, religion, disability, sexual orientation) and people’s experiences at their companies.

Men represented 41% of respondents, women 58% and gender non-conforming 1%.

The respondents represent different levels of seniority and include agencies, media owners and advertisers. There was no statistically relevant differences between organisation types for all findings.

Organisation type



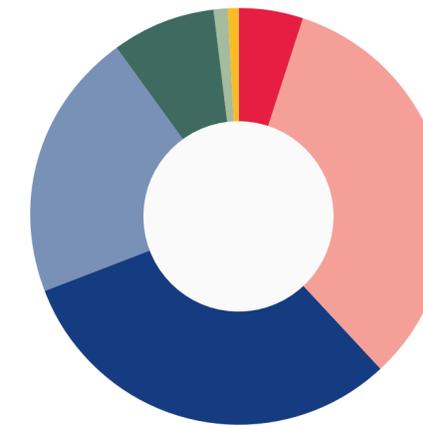
- 19% Brand
- 27% Creative agency
- 22% Media agency
- 5% Media/tech
- 3% Industry assoc/trade body
- 2% Production house
- 2% Publisher
- 3% Research/insights agency
- 7% Media - ad sales
- 9% Other (incl freelancer/photo/sound/music)
- 1% Prefer not to answer

Seniority



- 19% Executive Management/C-Suite
- 23% Other Senior staff
- 26% Middle Manager
- 10% Junior Manager
- 10% Trainee/Executive
- 10% Other
- 2% Prefer not to answer

Age group



- 5% 18-24
- 33% 25-34
- 31% 35-44
- 21% 45-54
- 8% 55-64
- 1% 65+
- 1% Prefer not to answer

Gender

41% Men

58% Women

1% Gender non-conforming

The core of this report is based on Kantar’s Inclusion Index, a proprietary tool used to address and benchmark I&D performance at both company and industry level. By using the Index, we now have clear insights into the profile of the employees that make up our industry, as well as highlighting key areas for improvement. This in turn equips leaders with a rich dataset helping them to inform action plans that address their most pressing issues and drive sustainable change. Kantar is able to calculate an inclusion score on the basis of asking questions about people’s sense of belonging, the absence of discrimination and presence of negative behaviours (see Appendix). This allows Kantar to benchmark every market against our industries global average. Whilst this gives us a point in time view, our plan is to track progress on our collective DEI initiatives by running the Index again in 2023.

A world of differences

The first key finding of the report is the wide variation between countries and between groups within each market. Even where a country has a strong overall score, there will be many issues that need to be tackled.

The sense that individual markets are taking action on diversity, for example, displays one of the widest variations across our key metrics. In the US for example, 83% respondents believe their companies are taking positive action to address diversity and inclusion. This figure falls to just 26% in the worst-performing market.

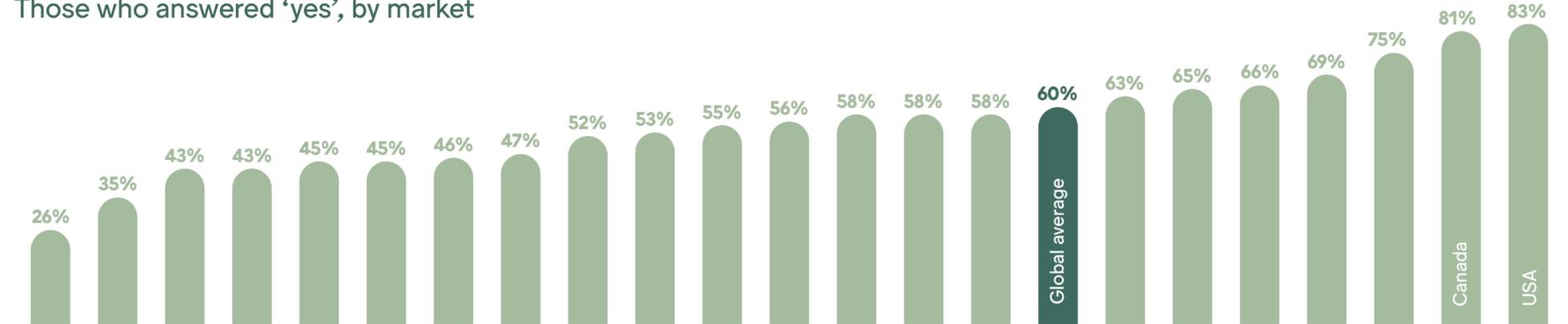
The global average inclusion score for the marketing industry was 64% but the difference between Belgium and the lowest scoring market is a considerable 19%. And there are big differences between certain groups in the same market.

Inclusion scores in India, one of the best performing markets, were 68% on average and 72% for men, but 62% for women. In the Netherlands, the average score was 68%, but for national minorities it dropped to 48%. Such differences were frequently also reflected in a pay gap.

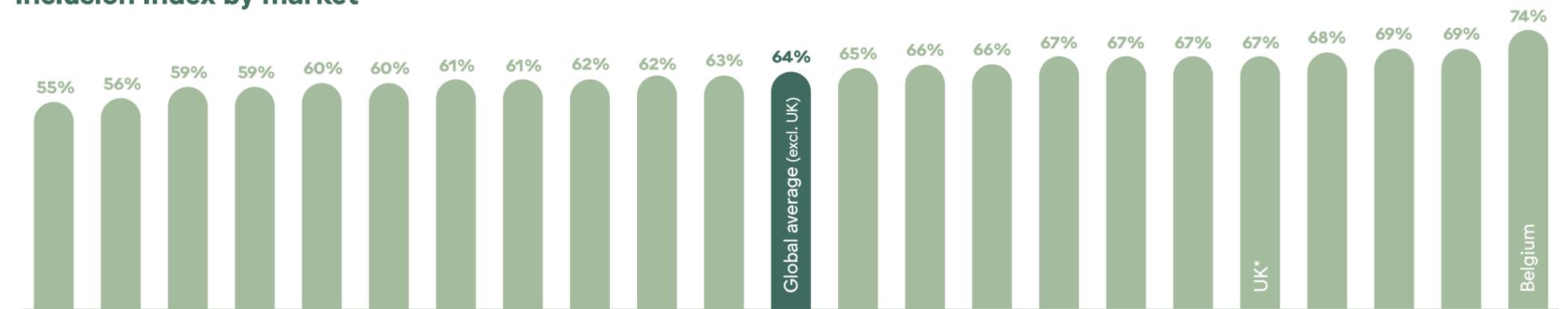
The inclusion scores for key groups beyond the male, ethnic majority is reflected in high scores for likelihood of leaving the industry. In the US, for example, the overall likelihood of leaving the industry jumps from 16% on average to 27% amongst ethnic minorities.

These findings should be a benchmark that allows markets to test future improvements rather than an excuse not to take action.

Do you believe that your company is actively taking steps to be more diverse and inclusive? Those who answered 'yes', by market



Inclusion Index by market



*UK All In Census was conducted in March 2021. The UK results are not built into the global results but we have included the index here for the sake of comparison.

How the inclusion index is calculated

Kantar is able to calculate an inclusion score on the basis of asking questions about people's sense of belonging, the absence of discrimination and presence of negative behaviours (see Appendix). This allows Kantar to benchmark every market against the global average.

The people who live the worst experiences

We are all many things. We may be male, female or non-binary but we are also mothers or fathers, white or black, gay or straight, senior executives or new starters to the marketing business.

The intersections between these different facets of our beings helps construct who we are in the round and contributes to our lived experiences. In breaking down the forms of discrimination by age, gender, family status, disability, sexuality or ethnicity, we can sometimes fail to reflect that those who are a combination of all or some of these things can have even worse lived experiences.

The goal of diversity and inclusion efforts should be to create an environment where employees can “bring their whole selves to work”.

This ambition cannot be achieved, however, if the marketing industry does not apply the intersectional lens required to empower individuals to truly express all aspects of their identity without fear of workplace discrimination.

When we looked at sense of belonging at their company among men and women, for example, globally the score is 75% for men and 70% for women. Add in disability, for example, and the scores drop to 65% for men and 57% for women.

We see the same pattern in individual markets. In France, for example, where the average sense of belonging score for men is 78% and 68% for women, the scores drop among ethnic minorities, falling to 70% for men and 54% for women. Similarly, in Canada white women report a sense of belonging of 76%, but this drops to 54% for black women.

Integrating intersectionality into DEI strategies is an essential part of achieving equality for all. In fact, failing to do so reinforces exclusion as it categorises employees through a single aspect of their identity.

The people who report the lowest sense of belonging tend to be people, particularly women, with disabilities and from an ethnic minority.

Take action

Leaders have the power to build a culture of true inclusion. Creating a workplace environment that thrives on intersectionality stems from the top.

Without leadership engagement or buy-in this will be difficult to implement. Diverse leadership teams help provide role models for everyone in the company. It's important to have ethnic minority and disabled role models but it is equally important to have role models who are younger or older women with children and care-giving responsibilities.

Create an environment where organic learning can thrive through encouraging continuous feedback, listening sessions and employee networks. Such safe spaces will empower employees to speak up on discriminatory behaviour without fear of judgement.

Internal policy change is also essential. Organisations should look to strengthen anti-discrimination policies and be transparent in escalation approaches. These approaches should consider the nuances of multiple identities and look to support these.

Age and family status

The most common forms of discrimination found by the census were around family status and age. These were universal issues.

More than a quarter of respondents agreed in both cases that their company does not treat all employees equally on both factors.

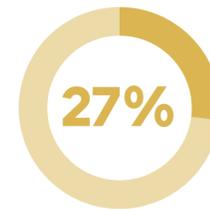
In the case of family status, the figure hit 40% among female respondents, once again demonstrating the impact of intersectionality in making specific problems worse for key groups.

The markets where more people agreed that age can hinder one's career were Ireland (45%), Spain (44%), Colombia (43%), France (43%), US (42%) and Canada (40%).

Those where fewer respondents agreed that age can hinder one's career were India (22%), Netherlands (24%), GCC, Pakistan, Hong Kong and Belgium (all 27%).

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

Family status*



agree company does not treat all employees equally regardless of family status



of women say family status can hinder one's career

Age



agree company does not treat all employees equally regardless of age



agree age can hinder one's career at their company

Take action

Set up an employee resource group with a focus on age and care-giving responsibilities.

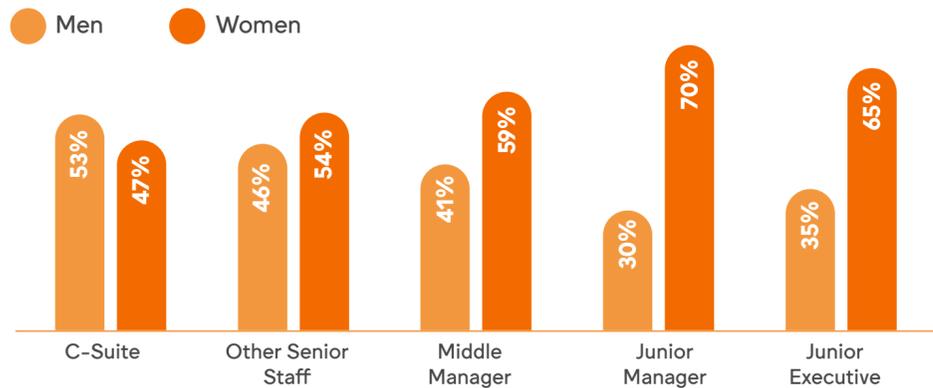
The focus should be on supporting both younger employees and engaging older staff, the groups most likely to agree that age is an issue in their employment experiences. It should also include people with care-giving responsibilities for children, the elderly and the sick.

The marketing industry must focus its efforts on reducing discrimination against younger talent, women with care-giving responsibilities and older talent.

Gender and family status

Women may feel almost equally to men (61% vs 63%) that their company is taking active steps in being more diverse and inclusive at a global level. Nevertheless, women are still under-represented at the most senior levels of industry.

% Men vs Women by seniority levels (global averages)



Some might argue that the high levels of female representation across the industry demonstrates there is a strong pipeline of female talent, which will eventually rise into senior positions, but this fails to acknowledge the distinctive obstacles linked to the realities of being a female employee.

Our data shows that the most common form of discrimination within the industry is linked to family status, which mostly affects women. Nearly half (47%) of women with children under 16 agreed that their family status hindered their career compared to 22% of men with children under 16.

47% of women with dependent children say family status can hinder one's career.

There is evidence of a gender pay gap in nearly all markets at more senior levels although there is some evidence that women are paid better than their male counterparts at junior or entry level in a number of markets. The global pay gap between men and women at an executive/C-Suite level is 13%, at a senior level it is 11% and a middle management level is 7%.

Best performer and most challenged

The markets where we see the largest differences between men and women's views on family responsibilities hindering one's career are:

Spain - 27% difference

Ireland - 25% difference

Japan - 24% difference

Sweden scored best with female respondents reporting the least amount of difference relating to family responsibilities hindering one's career (5%).

Take action

Playing the numbers game won't solve the problem.

Businesses need to understand and improve women's lived experiences. Support plans will need to be tailored to the cultural nuances and employment conditions in each market.

The reported pay gap varies significantly between markets. Most report a gender pay gap in favour of men at more senior levels (as much as +85%), and many report a pay gap in favour of women (as much as +43%) at more junior levels.

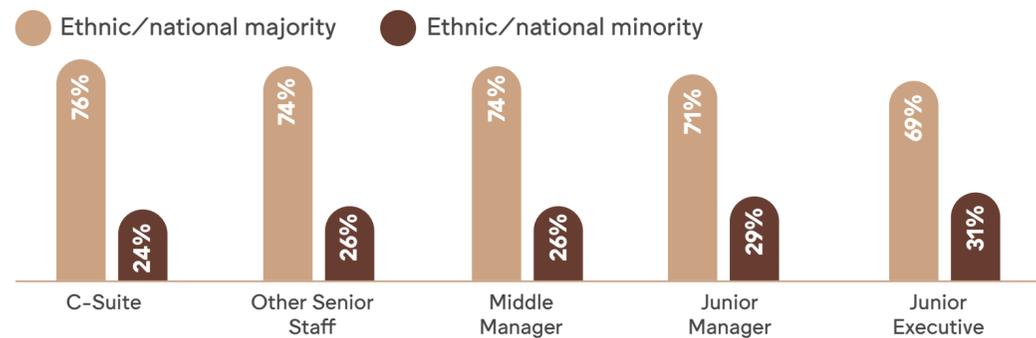
Ethnicity

A majority of respondents (60%) feel that their organisation is actively becoming taking steps to be more diverse and inclusive. This sounds positive but in 15 of the 21 markets where ethnicity was measured, ethnic minorities felt less convinced than their ethnic majority counterparts.

The most extreme gaps were found in Malaysia (49% among minority groups vs 65% overall), South Africa (58% vs 78%) and USA (73% vs 87%).

Representation is a serious issue at senior levels. As you go up through the ranks, ethnic minority representation consistently drops. In Ireland it's just 2% at the most senior level. And without people who look like you at the top, many people from ethnic minorities have understandably come to believe that their ethnicity has a negative impact on their careers.

% Ethnic Majority vs Ethnic Minority respondents by seniority level (global averages)



33% of ethnic minority respondents reported observing inappropriate behaviours at their company.

In France, 38% of ethnic minorities feel that learning opportunities or progress is restricted by senior colleagues while in Japan 42% of national minorities feel undervalued compared to colleagues of equal competence.

The expat exception

Not all minorities are discriminated against. In Singapore, which over-indexes on national minorities in senior positions (75% of C-suite respondents self-identify as non-Chinese), these “minorities” are likely to be white expats, illustrating the point that care must be taken when drawing conclusions in this area. The situation is also complicated, but in different ways, in the Gulf (GCC), Hong Kong, Malaysia and the Netherlands.

Ethnic minorities and women generally observe more negative behaviours

% of people having experienced negative behaviours in the workplace



Take action

Broad engagement on diversity and inclusion is not enough. Leaders must ensure that initiatives have a practical impact and address the needs of those they are intended to serve.

A conscious effort is needed to increase ethnic representation. This can be achieved through global representation targets, particularly at senior levels. Engaging with minority ethnic groups will help management to understand their experiences in more detail and better identify obstacles to career progression. The process of addressing these issues will boost the sense of belonging amongst these groups.

On ethnicity we need to take a market by market approach. Generally, ethnic minorities report greater discrimination, more negative behaviours in the workplace and less sense of belonging and are under-represented, particularly at more senior levels.

Disability and mental health

Only 7% of respondents self-identified as disabled and this is down against the overall global population (15%*). Just seven countries reported disabled respondents at a level that is commensurate with the number of disabled people in the overall population. But many countries registered disabled response percentages which were 5% or more below the reported national level, suggesting the marketing industry does not adequately represent disabled people in most markets.

Of those who identify as disabled, 71% relate their disability to mental health/cognitive rather than physical challenges (47%) – note our definition is that a mental health condition that has long term – more than 12 months – impact on an employee’s normal day to day activity counts as a disability. People can also face both physical and mental health/cognitive challenges.

Of the 7% of respondents who identified as being disabled, a strikingly low percentage (44%) claimed that their company was aware of their disability or health concerns. Of this figure, a majority (59%) reported that their company is supportive of their health condition.

Our research shows that employees are more likely to share information about their disability in an organisation that offers clear company support as evident in Greece (60% aware, 67% feel supported), Ireland (58% aware, 76% feel supported), and Pakistan (50% aware, 64% feel supported).

*<https://www.who.int/news-room/fact-sheets/detail/disability-and-health>

What’s less encouraging is the low sense of belonging that disabled respondents feel.

60% of disabled respondents agreeing they belong at their company compared to 73% of non-disabled respondents.

As with ethnicity, low representation can have a negative impact on awareness and ultimately sense of belonging. If disabled employees do not see themselves across the organisation then they are less likely to feel like they belong.

The picture is most positive in Japan, where 13% of the respondents identify as disabled, the highest representation in all markets, and sense of belonging scores (71%) are equal for disabled and non-disabled respondents.

We also asked respondents if they were currently feeling anxious or stressed in light of the current Covid 19 pandemic and lockdowns. A third of respondents said they were.



A third of total respondents agreed that they were feeling anxious or stressed in light of the current climate.

Career obstacles or equal opportunity

People with disabilities report the most career obstacles when compared with other minority groups. Respondents in The Netherlands (+32%), Colombia (+29%), and Portugal (+29%) experience the biggest differences in reporting career obstacles due their disability compared with their non-disabled counterparts, for example, with Brazil (-8%), Ireland (-2%) and Malaysia (no difference) reporting the least difference, with either positive or equal obstacles reported.

Take action

A key issue in understanding disability is having access to meaningful data.

If employees are reluctant to share their disability, then the proportion of disabled leaders in senior roles in the marketing and advertising industry will remain unknown, thus giving a skewed image. Leaders should focus on developing inclusion and diversity strategies that open up the conversation around disability and include mental health/neurodiversity into the conversation in order to collect this data and raise company awareness.

Sexual orientation and gender identity

Collecting data in this area is more challenging than in others as legal restrictions and cultural sensitivities often influence whether questions on sexual orientation can be asked. While many countries legally recognise and accept LGBQ people, in some markets being LGBQ can still be a criminal offence.

It's also worth pointing out that unlike the other key groups identified in this report, LGBQ employees can choose not to disclose their sexual orientation and may have positive experiences because they also belong to a majority or dominant group.

What our survey found is that those who declare their sexual orientation report the least amount of discrimination in markets with good LGBQ representation. In Belgium (13% LGBQ) for instance, respondents report next to no discrimination based on sexual orientation.

In other markets with good representation on LGBQ such as France, Japan, South Africa, and Spain, respondents over-index on belonging compared to their heterosexual counterparts.

Nevertheless, there are still reported instances of personal discrimination due to respondents' sexual orientation in nine of the 13 markets where it was legal to ask the question.

Generally, lesbian, gay, bisexual and queer (LGBQ) respondents scored lower on the Kantar Inclusion Index (60%) than their heterosexual counterparts (65%) and reported a slightly higher

presence of negative behaviour (20% versus 17% for heterosexual respondents).

They were also much less likely to see people in leadership positions (48%) than heterosexual respondents (62%) and reported a higher incidence of feeling consistently anxious in their jobs (35%) compared to heterosexual respondents (27%)

35% LGBQ respondents reported feeling consistently anxious in their jobs compared to 27% of heterosexual respondents.

Supporting transgender colleagues

Transgender issues have become a particular focus of attention in recent years. Whilst less than 1% of our sample identify as transgender, we can see that this community has a lower sense of belonging at their company (67%) and is less likely to feel comfortable being themselves at work (63%). Leaders should engage with those who identify as transgender within their organisation to ensure that these employees are comfortable being themselves at work.

Take action

Difficulty in measuring progress in LGBTQ+ diversity should not be an excuse for complacency.

Leaders should prioritise understanding their market and look for opportunities to engage with LGBTQ+ issues in a way that can inspire a culture of openness. Set targeted development programmes or language sensitivity training courses for employees around LGBTQ+ issues.

The creative industries have often been a welcoming and natural fit for the marginalised. Marketing should embrace this and focus efforts on making LGBTQ+ more at home in the industry.

Conclusions

Of course, these are not just the marketing industry’s problems but society’s problems. Addressing DEI is such a big challenge because differences in perceptions among different groups corroborate systemic issues in society around gender, race, religion, ethnicity and sexual orientation.

Just 43% agree that the best opportunities go to the most deserving employees

And with ethnic majority males often proportionately over-represented in industry leadership positions, driving progress on DEI can be slow not necessarily on account of self-interest but by a potential lack of understanding or motivation to challenge the status quo, which, looking at our data, does work well for so many.

But being diverse and inclusive is not just the right thing to do, it is also good for the bottom line. In an industry vying for talent with big tech platforms, one in seven of our respondents say they would leave their company and the industry on the basis of a lack of diversity and inclusion. Leaders must prioritise DEI if they want the best talent.

There is another huge incentive for the marketing industry to get this right; diverse teams are better equipped with the insights to understand how best to market to a diverse consumer base.

It’s pretty simple. Happy, healthy and inclusive teams perform better. If you want to explore how you can be part of the WFA-led movement to help drive better diversity, equity and inclusion in both the workplace in marketing communications more broadly (i.e. in front of and behind the camera) then please get in touch with us. We’d be delighted to help.



Belinda Smith
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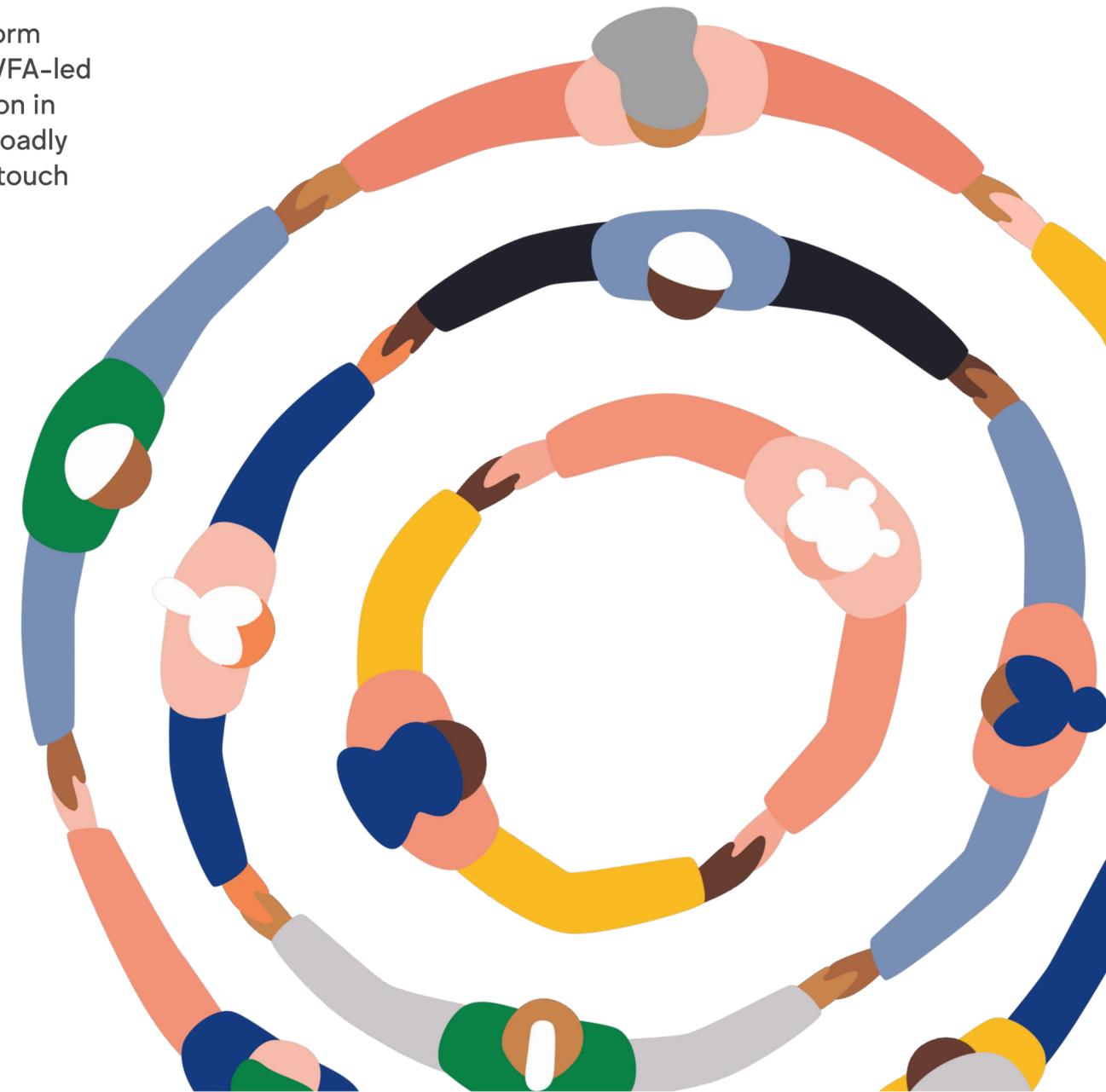
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Appendix

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

Company sense of belonging:

How strongly do you agree or disagree with these statements?

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

Presence of negative behaviour:

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

Yes/No

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

Absence of discrimination:

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

Yes/No

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

Our thanks to the WFA Diversity & Inclusion Taskforce for their support



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Ambassador, Philips



Michele Prota
Chief Talent Officer,
Forsman & Bodenfors



Mason Williams
Senior Director Diversity,
Equity and Inclusion,
Mattel



Rachel Simpson
Senior Global Brand
Manager, Unilever



Beatrice Bourdel-Grant
Strategic Marketing
Communication Director,
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Elsbeth l'Anson
Strategic Communications
Consultant,
UN Women



Emiliano Laricchiuta
Global Head of Kinder
Products with Surprise,
Ferrero

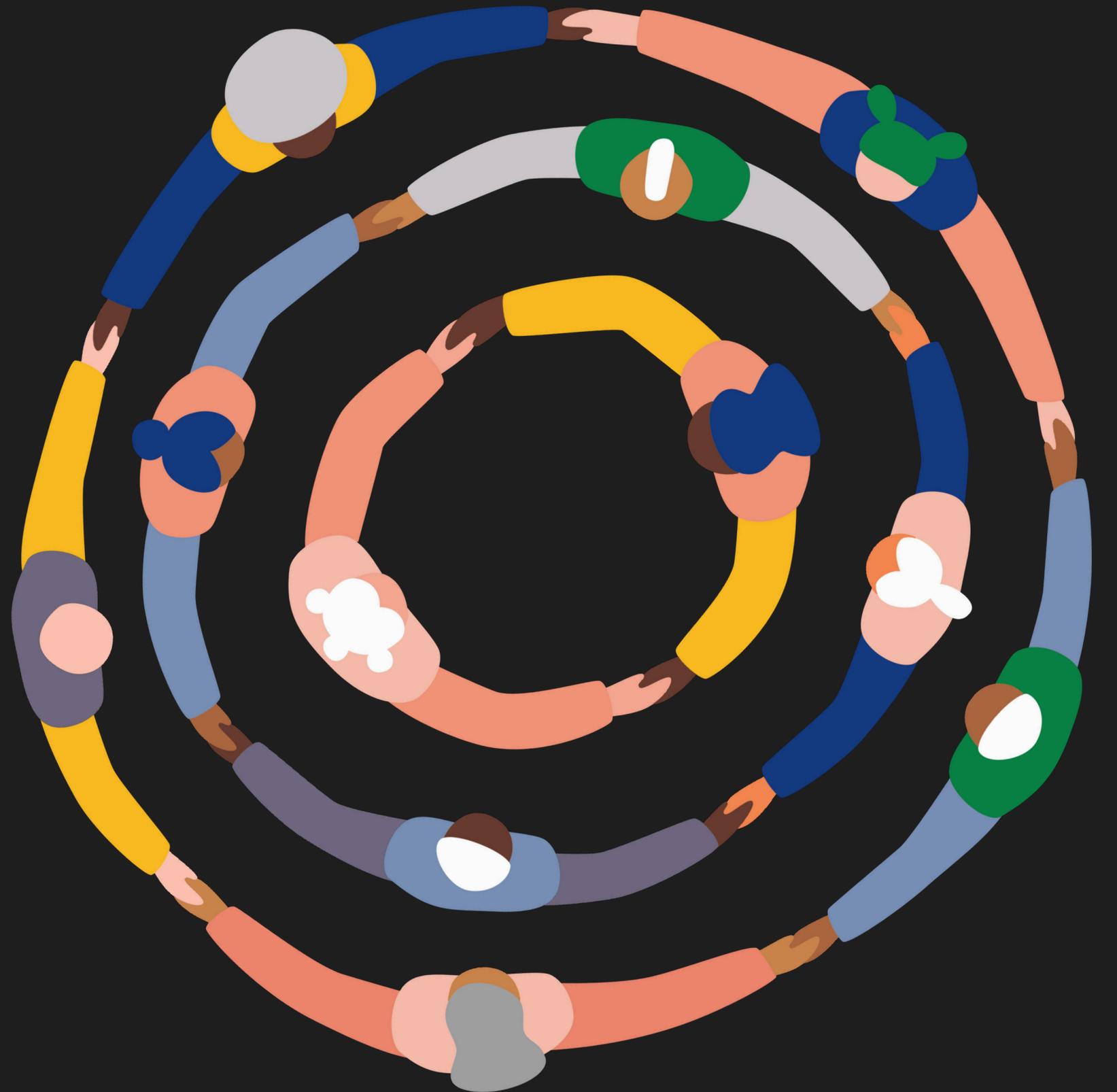


Putri Realita
Global Diversity &
Inclusion Lead,
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Heide Gardner
Global Culture Officer,
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