

ALL IN

REPORT & ACTION PLAN

ADVERTISING
ASSOCIATION

I S B A

IPA
Incorporated
by Royal Charter

KANTAR

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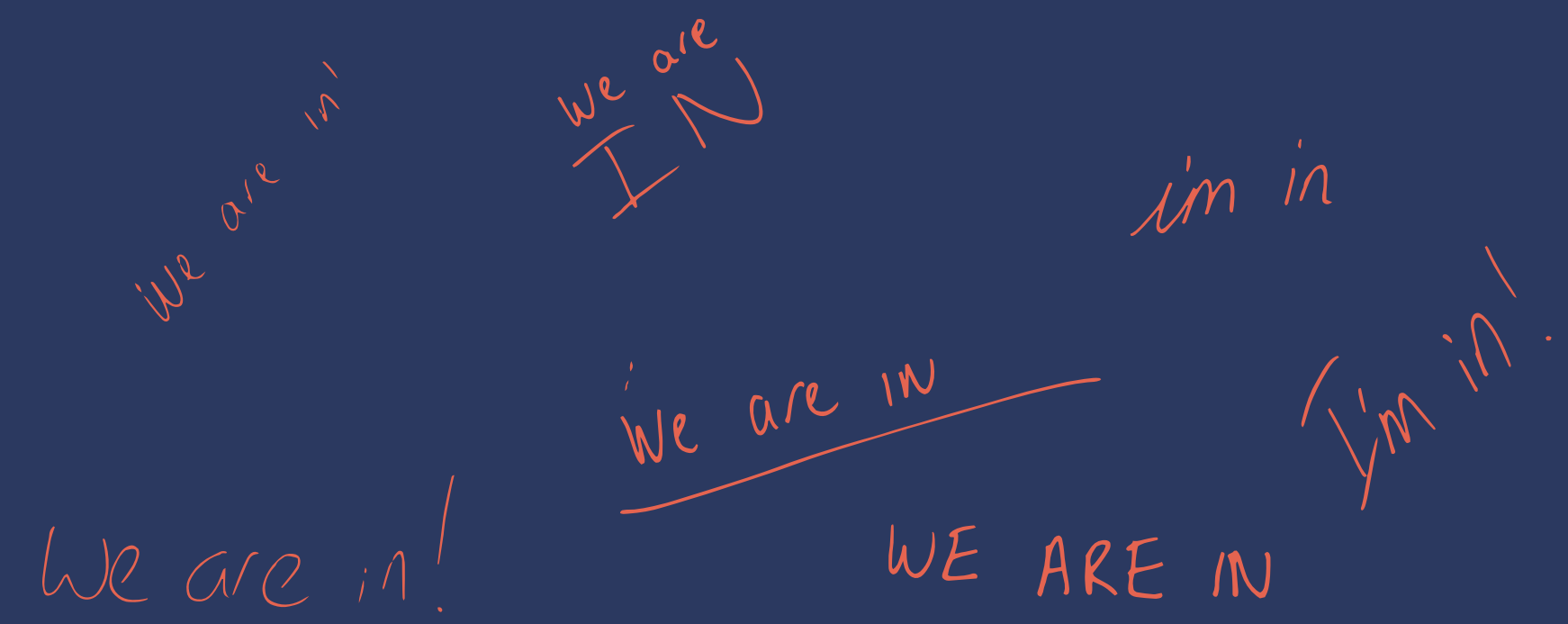
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LET'S MAKE OUR INDUSTRY INCLUSIVE AND WELCOMING FOR ALL

2020 was a year of seismic change across the globe and we were confronted by a number of issues that we may not really have focused on given the normal, busy everyday lives we all lived.

It's been interesting to contemplate the notion – as repeated often in the context of Covid –that unless everyone is safe then none of us is safe. It is a reflection of how, as individuals, **we can be part of driving change and inclusion from every position**, not just those roles that may be perceived as powerful or responsible, at first glance, for creating change. But that we, as individuals, have a substantive and substantial role to play in **making change happen**.

The sheer volume of responses we got to the All In project has been exceptional. From the hard work of the **Inclusion Working Group** – all of whom had a lot happening in each and every aspect of their lives and yet gave so much focus and thought to the Inclusion agenda – as well as the companies, large and small, who joined in with **All In**. Each person who took the time to fill out the survey, knowing that their contribution counted, became the foundation of this sector-leading piece of work. The response we have had from other countries to this initiative has been gratifying and in sharing our methods we hope that we can spread the good work worldwide.

This report is just the start of a long term and wide-ranging body of work for our sector. This report captures the main themes from the data and we believe that by focusing on our workplace, as well as amplifying initiatives to recruit the talent that works in it, we can ensure that wider communities feel they belong and have an opportunity to progress their skills and talent. As well as today's report, we hope to repeat the **All In Census** in two years' time to measure progress and then ideally every two years thereafter. We have also refreshed our website hub to coincide with the **Report** and **Action Plan** and its focus is to provide agencies, media owners, tech platforms, production companies and brand marketing teams with resources to action their own inclusion journey. As well as the All In Census findings, the **All In Report** and **Action Plan**, it is home to a directory of all the relevant initiatives that support the plan.

We need to realise that we are tackling large and long-standing issues and that we can't do everything at once. Our plan is to provide focus and clarity on each of the characteristics we analysed in the research and, systematically, work to create a compendium of guidance that will make advertising and marketing the leading area in Inclusion. We are determined to approach this in a way that will create and embed this work in our industry, turning away from what can be seen as a check list of short-lived initiatives that have been a problem in Inclusion for so long. I am determined to see action, not more mere words, however well intentioned.



KATHRYN JACOB,
CHAIR, INCLUSION WORKING GROUP;
CEO, PEARL & DEAN

So, please see this as the initial release in the long running franchise that is the result of an extensive collaboration between the **Advertising Association**, the **IPA** and **ISBA**. We will, in time, address all of the characteristics that we asked about in the survey but until then, we welcome your support and your commitment to change, so that we can become more reflective of the audiences that we serve.



**IT'S BEEN AN ABSOLUTE PLEASURE
AND ONE OF THE PROUDEST
MOMENTS OF MY CAREER TO BE
PART OF THIS TEAM.**



IMPROVING REPRESENTATION ACROSS THE ADVERTISING LANDSCAPE

This last year has demonstrated that the creative industries are not only adaptable, but that they are resilient. Whilst the social and economic impacts of Covid-19 are clearly very significant, it is my belief that we can harness what has happened to make positive changes in the advertising industry.

We are all emerging from one of the most worrying and uncertain periods in recent history, and I know that the initial shock to the economy of Covid-19 led to significant reductions in advertising revenues. I am pleased to see there is now evidence of recovery, and that the sector is on track to grow this year. So this is a great opportunity to step back and look at the individuals who make up this incredibly important sector.

We need to ensure that we are equipping future generations to grow the creative legacy that this industry has cultivated. The first phase of the **All In Action Plan** will tackle some of the core issues.

I know we all spend a significant amount of time working, and so it's hugely important that anyone employed within the creative industries feels included and empowered. In turn, this means the individuals within our organisations can flourish and the sector as a whole can continue to lead the world - and the work that we produce is as representative as possible.

I'm so impressed to see that the **Inclusion Working Group** has been so impactful in the short time since its inception. From initially meeting in September, to conducting the largest ever advertising workforce study in March, to presenting their **All In Action Plan**. The pace at which they have delivered this programme of work is admirable.

The **All In Census** marks a pivotal moment in improving representation across the advertising landscape. We now have some powerful data from which we can benchmark progress. With so much information it would be tempting to try to solve all the issues, however, the strategy of tackling a few core issues at a time will prove the most effective.

The **All In Action Plan** firstly highlights the importance of the experience and representation of Black talent in the advertising industry. The survey showed us that while the initial recruitment of Black talent is strong, retention rates drastically drop. It's reassuring to see the response of the industry in this area and I am really encouraged to see that some of the largest names in advertising are powering major initiatives around race in our sector.

The second strand in the **Action Plan** seeks to significantly improve the experience of disabled people in the advertising workforce.



CAROLINE DINÉNAGE
MINISTER FOR DIGITAL
& CULTURE, DCMS

I think we can all agree that the pandemic has really opened up new perspectives on where and how we work. Many people have effectively shifted to working from home, or a form of hybrid working where it has become increasingly possible to balance our lives in new ways. This has accelerated conversations about working with colleagues who have different abilities.

This is a real opportunity for companies up and down the country, large and small, to audit their company website and ensure it meets the latest accessibility standards.

The third and final strand of the first phase of the **Action Plan** aims to improve the experience and representation of talent from a much wider range of backgrounds. To date, the advertising industry is predominantly made up of university graduates, with significant numbers of privately educated professionals as well.

I'm excited to see how the **All In Action Plan** will unfold and evolve over the coming weeks, months and years.

For me, inclusion is a core issue which speaks to the heart of the UK. We are a culturally rich nation which is on an upward trajectory to become even more diverse and we need to take action to hold ourselves accountable - to lock in and build on the progress we are making.

All of you have a real opportunity to be a part of that change and to make a difference.

HOW WE GOT HERE AND WHERE NEXT

Our campaign to improve Inclusion in the UK advertising industry workforce launched with the first ever all-industry survey, the All In Census, on March 10. Conducted by **Kantar**, the survey was for everyone with a role in UK advertising and covered protected characteristics as well as position, salary and our experience at work. In order to get the valuable insight we needed, the survey was anonymous and all the data has been aggregated and reported at macro level.

We had hundreds of pledges from leaders of companies including **Asda, Barclays, C4, Dentsu, Facebook, Global, Google, ITV, Omnicom Media, Publicis Groupe, P&G** and **WPP** to share the **All In Census** with their relevant staff, as well as trade bodies such as **IAB, DMA, NMA** and **PPA** cascading to their members. With over 16,000 responses from creative, media and marketing agencies, advertisers, media owners, tech platforms and production companies, this incredible response illustrates how important inclusive representation is to our industry. It has also triggered a global response, with the WFA leading the industry trade bodies of 22 countries to conduct a roll out of the survey next month – with All In seen as leading the way.

The aim of our work is to maintain the positive lens of inclusion rather than focusing on diversity and potentially sustaining the silos and feelings of alienation that exist. Currently, £6 billion is spent globally on DE&I initiatives and yet progress is relatively slow. We believe that by changing our workplace, we not only ensure that more people feel they belong and have an opportunity to progress in their career, but the work we create will more authentically represent the diverse society we serve.

Just as important as collecting the data is what we do with it. **The All In Action Plan** is very much ‘volume one’ of a constantly evolving plan so that we can effectively tackle everything we need to. With just one ask at a time for each action in the plan, we hope we can achieve significant results in a short space of time. Our goal is to repeat the **All In Census** in two years’ time to track progress and every two years thereafter, making it the industry benchmark for Inclusion.

We have created the **All In Hub** as home to the **All In Census** findings, the **All In Report** and **Action Plan** and crucially, a directory of resources to support the industry in wherever they are on their journey to greater inclusion. We hope for this to be a one-stop-shop that spotlights the brilliant initiatives that recruit, support and advance diverse talent. It is vital to this work that we join the dots and amplify existing initiatives, rather than reinvent the wheel.

The Covid-19 pandemic has also given us an opportunity to learn from each other as we explore new ways of working and communicating. In a year when we have made things happen, when we previously doubted they were possible – and we have seen greater cross-industry collaboration than ever – we hope this really is the moment to challenge ourselves and create the workplace where we all feel we belong.



SHARON LLOYD BARNES
COMMERCIAL DIRECTOR,
ADVERTISING ASSOCIATION

“

**THIS REALLY IS THE MOMENT
TO CHALLENGE OURSELVES AND
CREATE THE WORKPLACE WHERE
WE ALL FEEL WE BELONG.**

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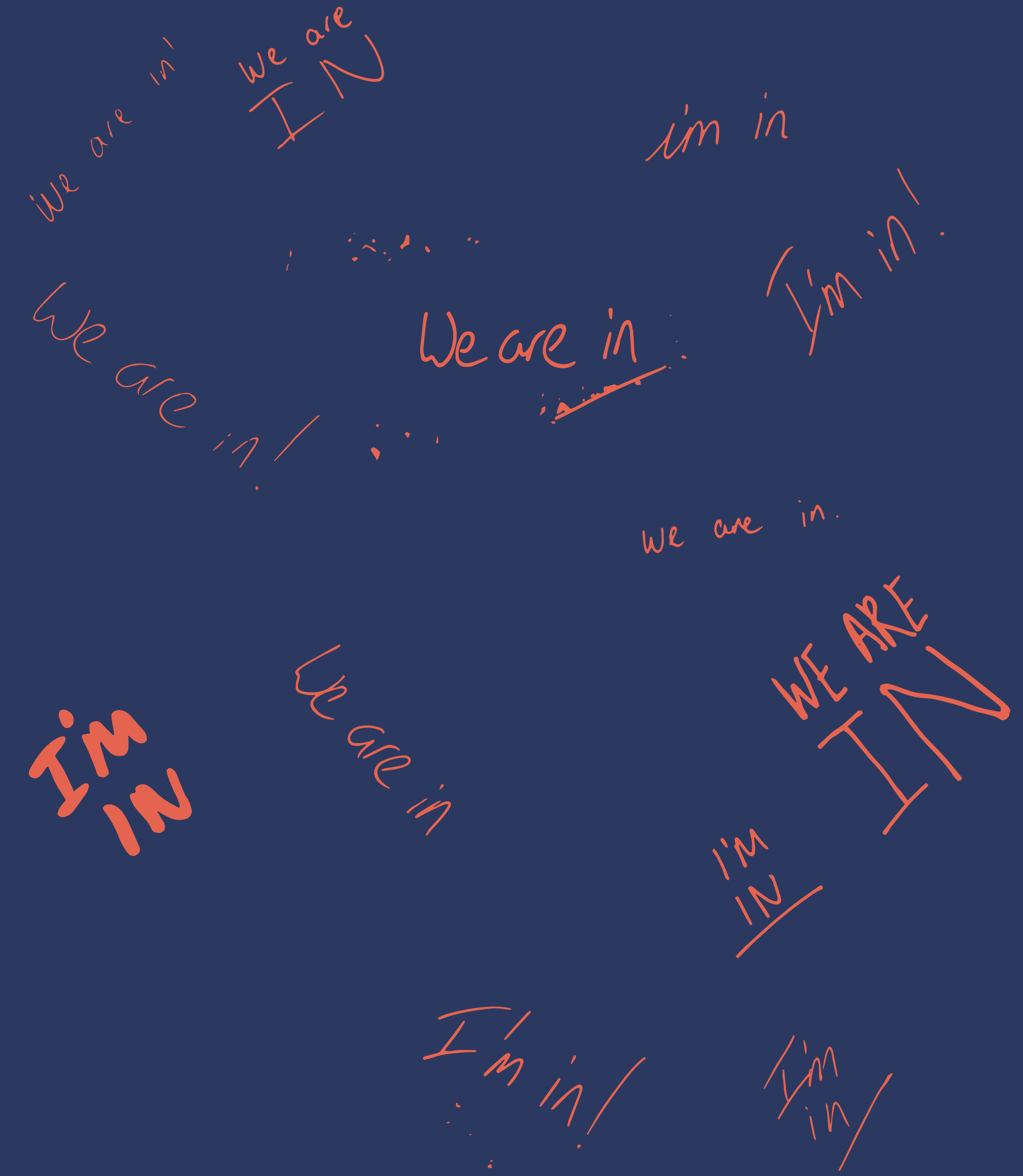
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EXECUTIVE SUMMARY

The All In Census launched on the **10th March 2021** with the bold aim of the entire UK Advertising industry coming together on one day to share their own protected characteristics and experiences in the workplace. This survey provides new insights into the profile of the employees that make up our industry. Over 10,000 responses were received on day one and by the time the survey closed on 22nd March 2021, the final count of responses was over 16,000 making this **the largest survey response ever** recorded across the UK advertising industry.

This sample has deliberately not been weighted to be representative – rather, **the voices of 16,000 advertising professionals** across all parts of the industry have been listened to. The result is an informed view of the DNA of the industry's workforce as of March 2021 and a full year on from the beginning of the Covid-19 pandemic.

This is the largest survey response ever recorded across the UK advertising industry and marks a high-point of collaboration between all elements of the industry in coming together to improve diversity and inclusion for all.

Thanks to All In, we have an incredibly rich data set to mine. It provides strong and clear direction for the UK advertising industry as it strives to become a more diverse workforce that allows employees to bring their whole selves to work and thrive and develop in an inclusive environment. It also provides a benchmark for progress to be measured against.

*Protected characteristics - It is illegal in the UK to discriminate against a person because of their age, disability, gender reassignment, race, religion or belief, sex, sexual orientation, marriage and civil partnership, pregnancy and maternity. These are 'protected characteristics' under the Equality Act 2010.



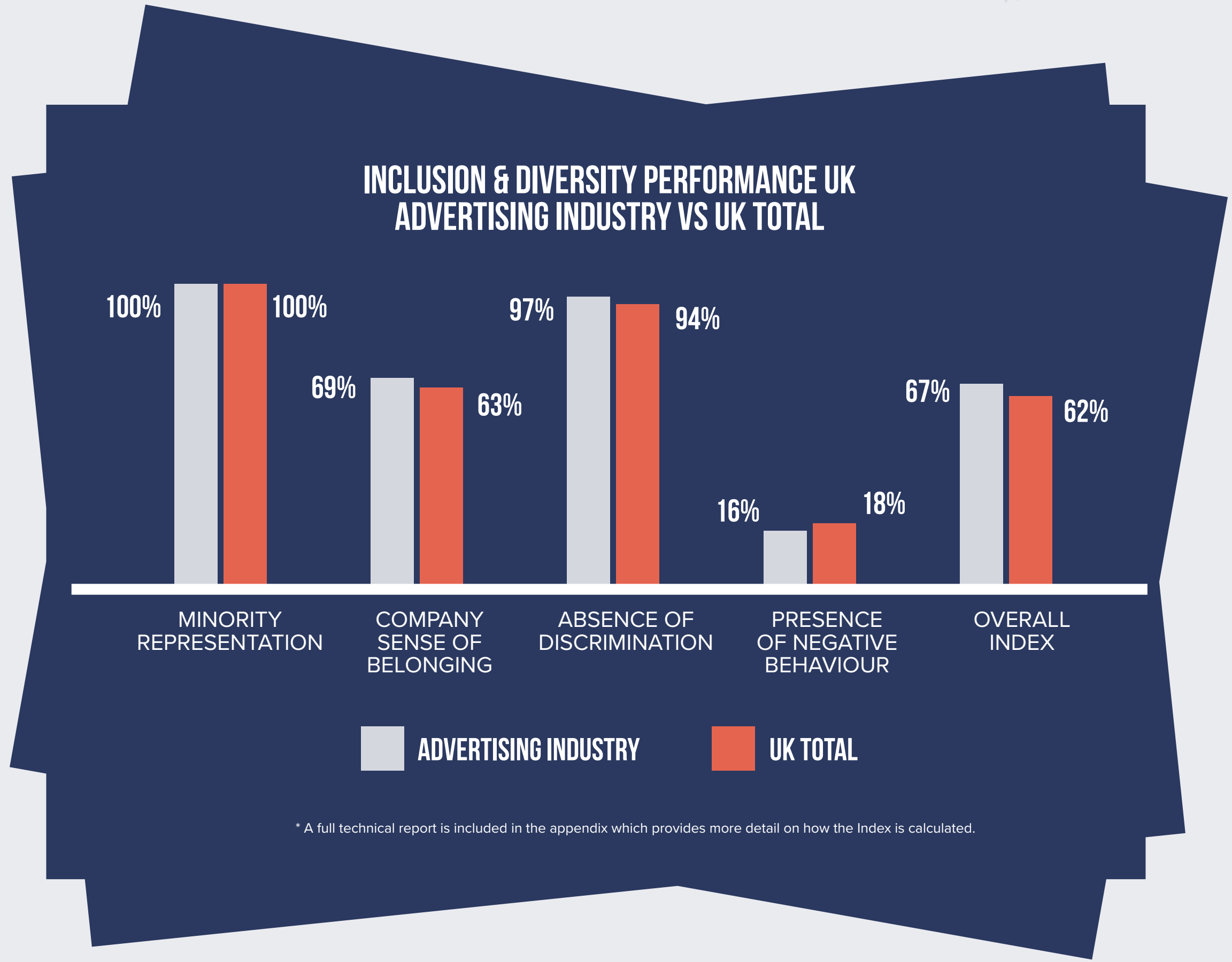
THE INCLUSION INDEX

The core of the survey questionnaire was based around **Kantar's Inclusion Index** - a proprietary tool used to benchmark and address Inclusion and Diversity (I&D) at a broader company (or in this case, industry) level. The Index is typically used by large, often multi-national organisations that are committed to an I&D strategy, but lack critical data to inform their action plans. It enables organisations to understand, track and measure their own progress in developing an inclusive and diverse workplace.

To do this, we survey employees anonymously, asking them to divulge information regarding their protected characteristics and their experiences at work. The overall Index is calculated via a number of sub-indices based around minority representation, company sense of belonging, absence of discrimination and presence of negative behaviour.

These data are then aggregated and analysed to provide an overall score to benchmark current performance as well as highlighting key areas for action. Using the Index, we are able to put the advertising industry's I&D performance into a broader context by being able to compare against the total UK workforce.

On each of the measures that make up the Index, the advertising industry outperformed the UK average an at an overall level, this shows that the industry is +5% points ahead of the UK benchmark.



While this is a great base to start from, as we explore the data further, there is still much to do in order to meet the overall ambitions for the industry and a clear opportunity to lead and influence broader societal change.

However, as we will see as we start to look at each of the protected characteristics measured by the survey, when we look through the lens of minority groups, there are a number of areas where improvement is necessary.

ALL IN

RESULTS AT A GLANCE

Generally, we are seeing reasonable representation across each of the diversity characteristics with social mobility and disability being the two areas that need focus. Older age groups are also under represented when compared to the UK working population.

However, the picture changes when we look at C-suite representation with most minority groups under-represented, in particular women, Black, Asian and disabled employee populations. This in turn is having a negative impact on the pay gap experienced by each of these groups.



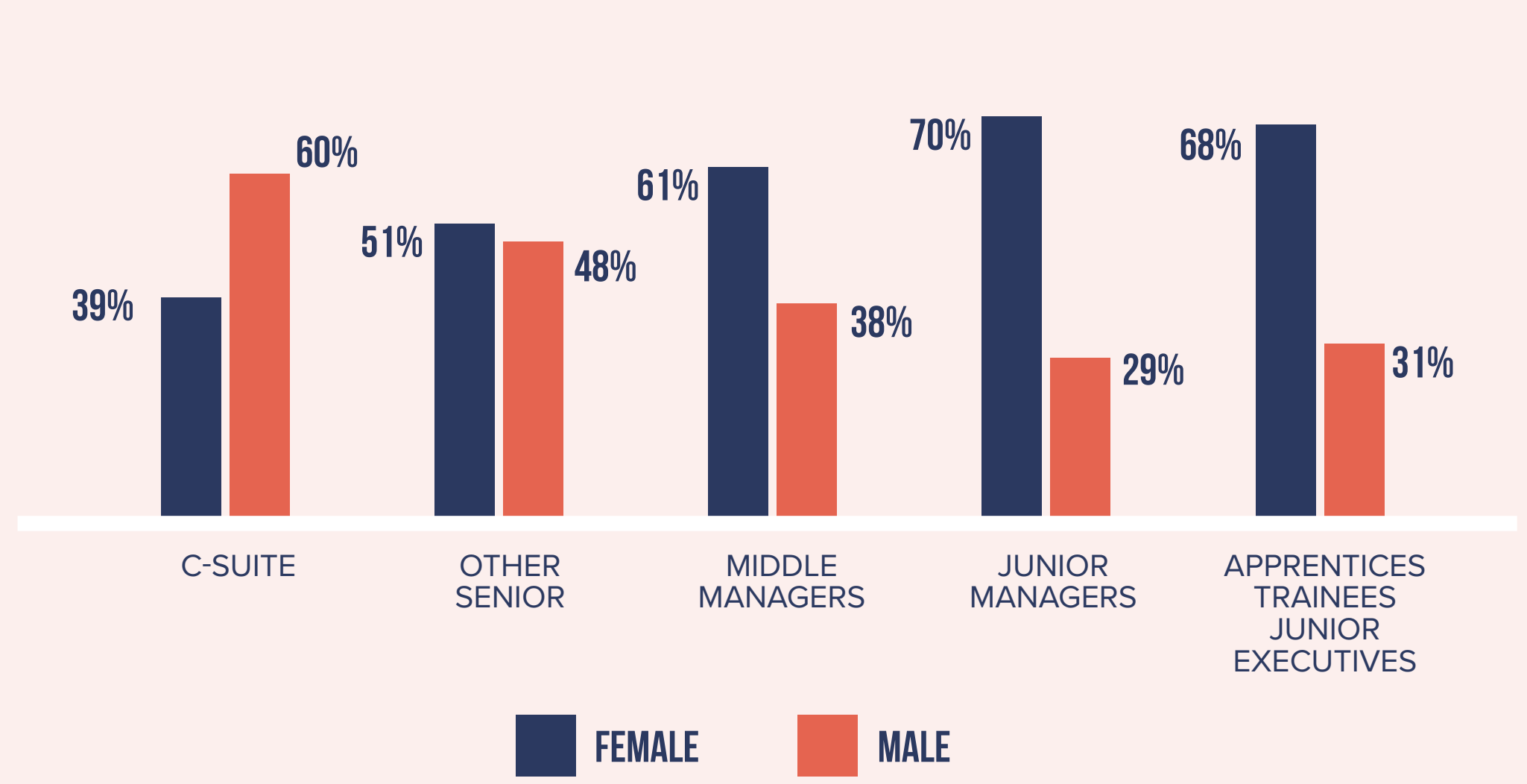
Looking at reported experience, the picture is mixed. Despite relatively poor experiences, most respondents do not identify these as specifically discriminating against them. However, the end result is leading to a high likelihood of turnover in marginalised staff. Therefore any action plan needs to focus not only on recruiting a diverse workforce, but ensuring that the experience is as inclusive as possible to avoid diverse talent leaving the industry because they don't feel like they belong.

GENDER

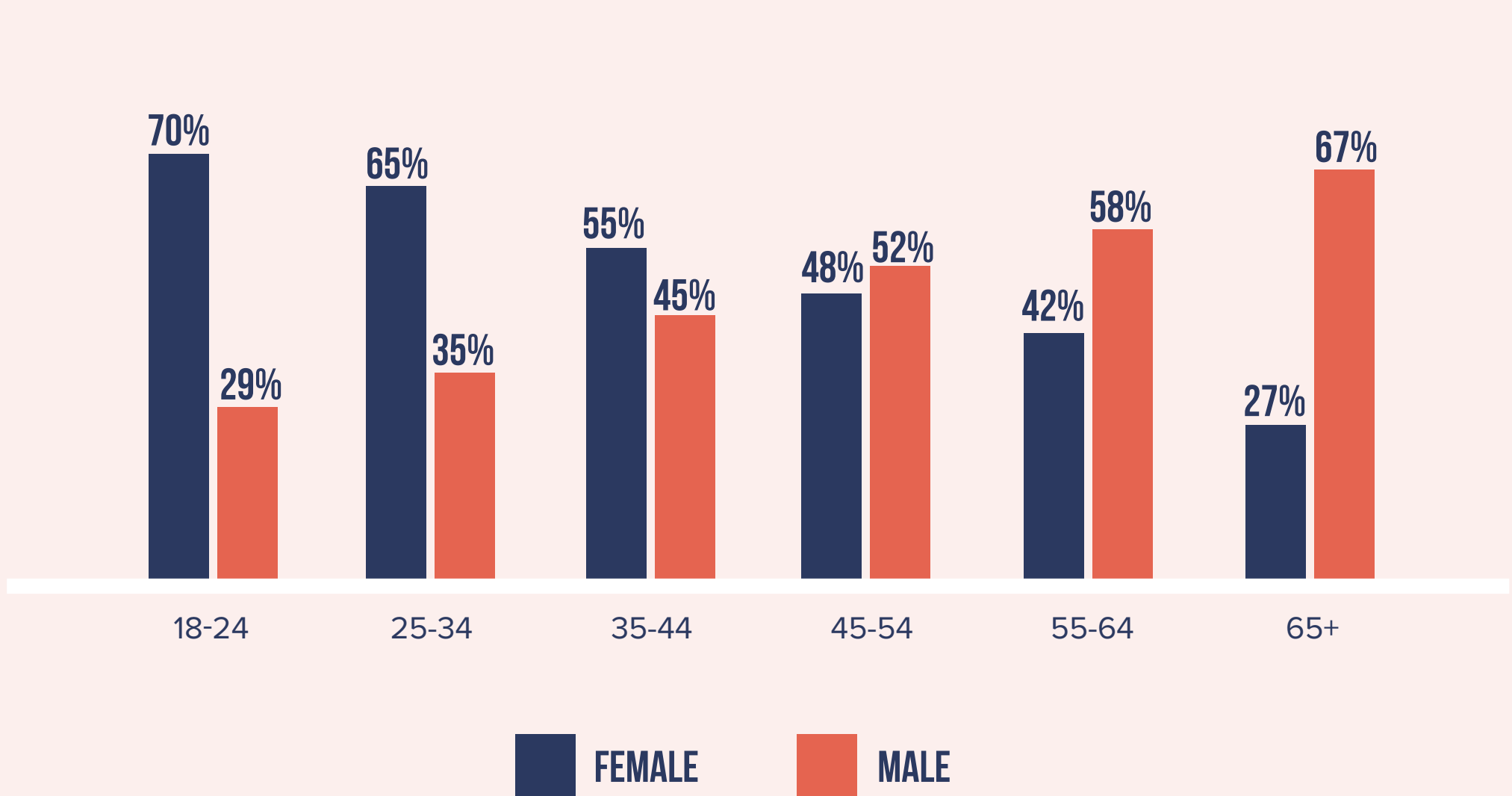
In our survey, women account for **59%** of respondents, men **41%** and non-binary/ prefer to self describe 0.4%. Although women are dominant in the overall sample, this picture changes when we look at the profile of C-suite employees with the proportion identifying as women dropping to **39%**, compared to **60%** of men. We can also see a considerable drop off in representation of women as age increases and there is a similar drop off in women earning over £100,000.

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GENDER REPRESENTATION BY LEVEL



GENDER REPRESENTATION BY AGE BRACKET



Of those who responded in the sample, we have been able to calculate a gender pay gap where women’s salaries are compared to men’s. Note that in the survey people indicated which salary band they belonged to as opposed to recording an actual salary, therefore this data should be regarded as directional and only able to provide some broad indication on the level of pay parity in the industry. Only full time reported salary bands were included in the analysis.

THE OVERALL PAY GAP FROM WOMEN TO MEN IS **24%**

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FURTHER ANALYSIS SHOWS A WIDENING
OF THE PAY GAP AS SENIORITY INCREASES.
WOMEN % STATED PAY GAP TO MEN:

10%
EXECUTIVE MANAGEMENT/C-SUITE

10%
OTHER SENIOR STAFF

6%
JUNIOR MANAGER

11%
MIDDLE MANAGERS

3%
APPRENTICES / TRAINEES
/ JUNIOR / EXECUTIVES

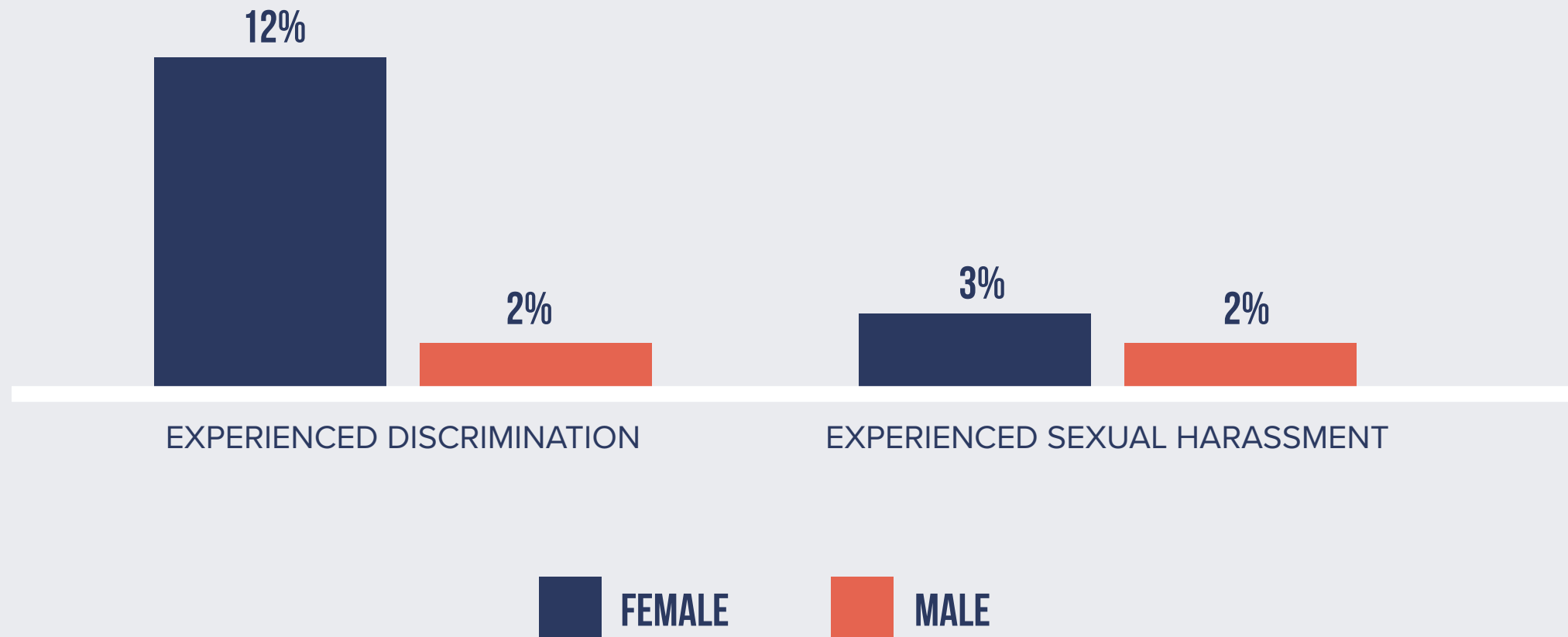
Possibly linked to these findings is the fact that **53% of women** who took parental leave in the last five years felt this disadvantaged their career.

53% OF WOMEN WHO TOOK PARENTAL LEAVE
FELT IT DISADVANTAGED THEIR CAREER

Looking at the differences in experience by gender, women are more likely to experience gender discrimination (**12%** vs **2%** of men) and more likely to leave the industry because of it (**15%** vs **9%** men).

3% of women report having experienced sexual harassment in the last 12 months (compared with **2% of men**).

EXPERIENCED SEXUAL HARASSMENT BY GENDER



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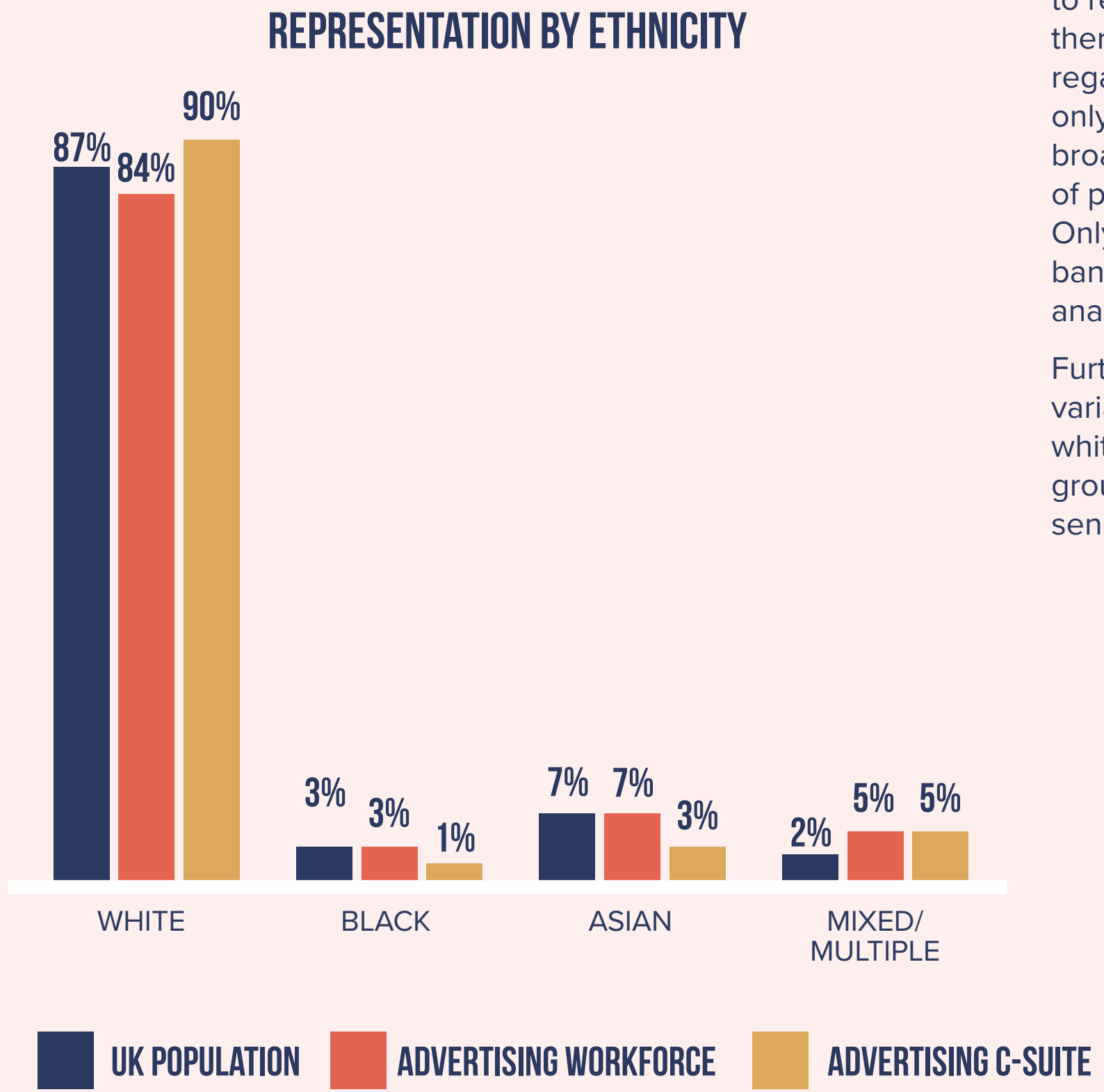
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Overall, representation is good, exceeding the UK working population in most areas. However, non-white representation in London (**17%**) is still a long way off the city working population (**33%**), and general London population (**38%**). Black representation in the industry is **3%**, equivalent to that in the general UK population but drops to **1%** in C-suite positions. Similarly, those identifying as Asian (**7%**) drop to **3%** at C-suite level.



We are also able to look at pay gap through an ethnicity lens which shows an overall pay gap from minority ethnic group to white of **11%**.

Note that in the survey people indicated which salary band they belonged to as opposed to recording an actual salary, therefore this data should be regarded as directional and only able to provide some broad indication on the level of pay parity in the industry. Only full time reported salary bands were included in the analysis.

Further analysis shows some variation by level between white and minority ethnic groups, particularly at senior levels.

MINORITY ETHNIC % GAP TO WHITE

6%
EXECUTIVE MANAGEMENT/C-SUITE

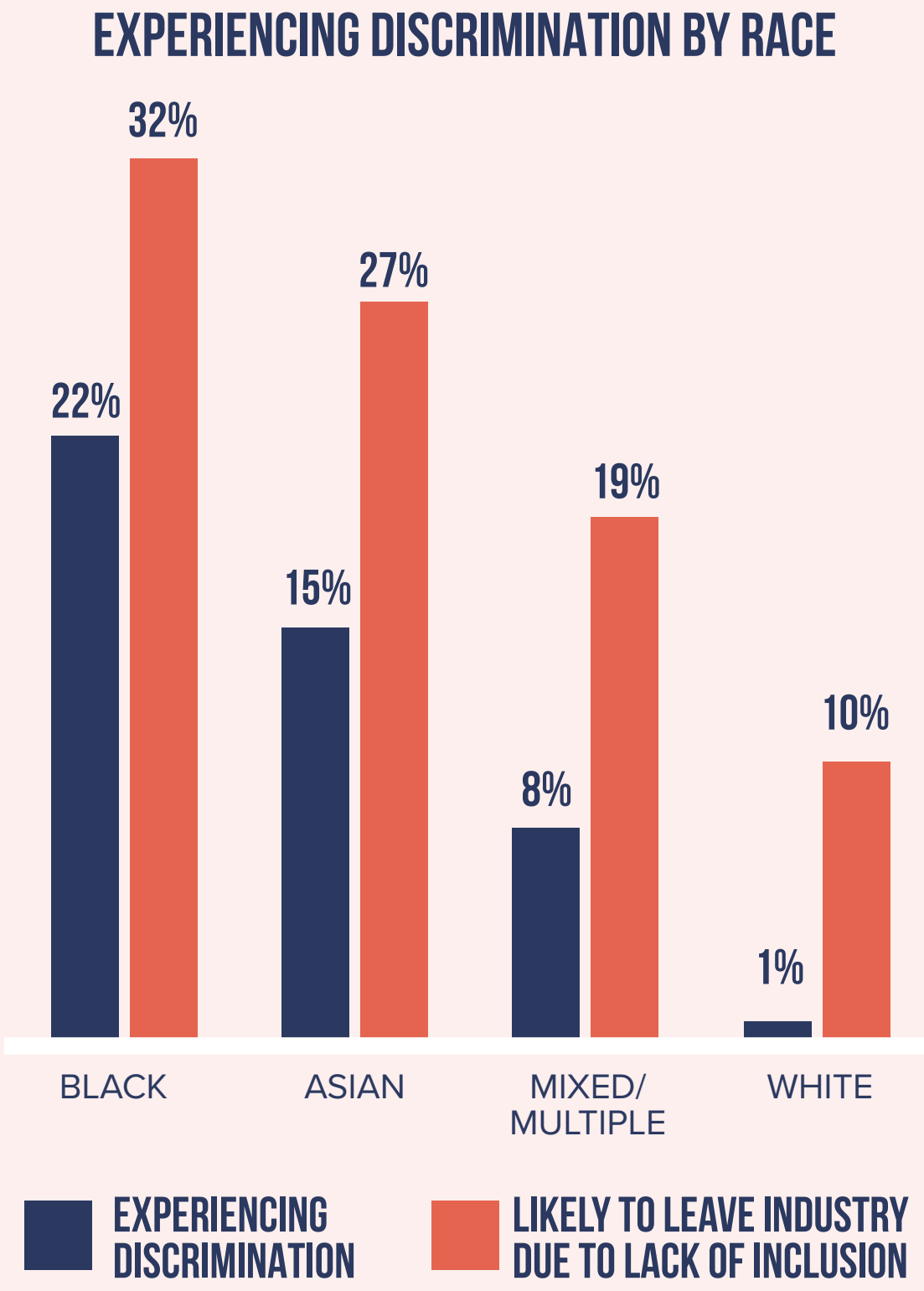
4%
OTHER SENIOR STAFF

0%
MIDDLE MANAGERS

2%
JUNIOR MANAGER

2%
APPRENTICES / TRAINEES
/ JUNIOR / EXECUTIVES

Black and Asian communities are experiencing most discrimination (**22%** Black and **15%** Asian reporting discrimination due to ethnicity vs **3%** overall) with nearly a third (**32%**) of Black respondents and over a quarter (**27%**) of Asian respondents reporting that they are likely to leave the industry due to a lack of inclusion and/or discrimination experienced.



SOCIAL MOBILITY

To create an accurate measure of social mobility, we used the questions recommended by the Social Mobility Commission to form a holistic picture of an individual's social upbringing. What this showed was that those from professional backgrounds are significantly over-represented (**64%** vs **37%** UK working population).

In addition, those attending an independent/fee paying school between the ages of 11-16 are over-represented - **20%** vs **8%** national average. This increases to **28%** at C-suite.

Those from working class backgrounds are under-represented (**19%** in sample vs **39%** UK working population) and less likely to be based in London or from White and Mixed ethnic backgrounds.

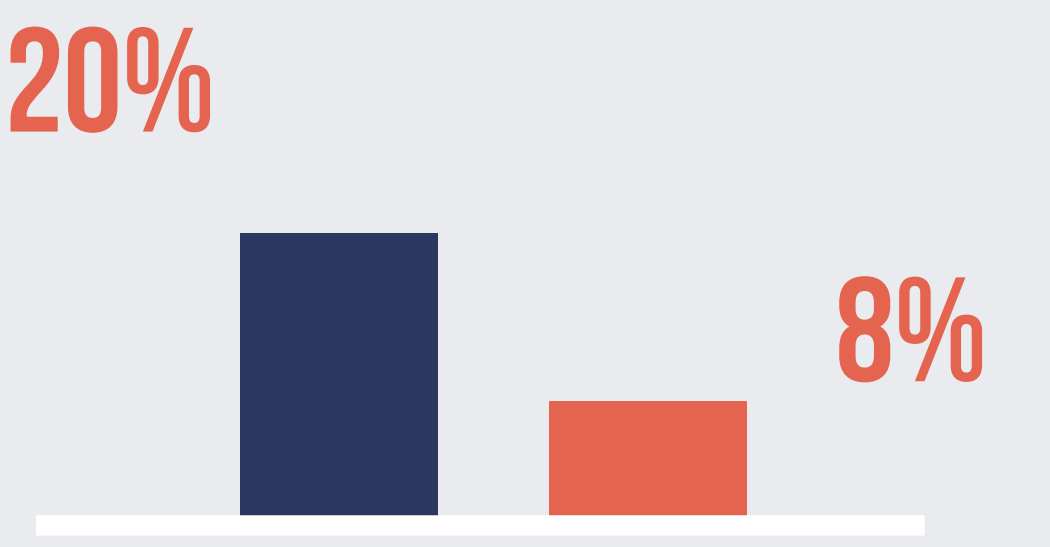
Finally, **72%** of the industry have a degree compared to **48%** of the UK working population.

Once in the industry, respondent experience does not appear to be negatively impacted by social background. Representation of working-class people at C-level is consistent with overall levels in the industry, and all experiential measures are remarkably consistent across all social backgrounds.

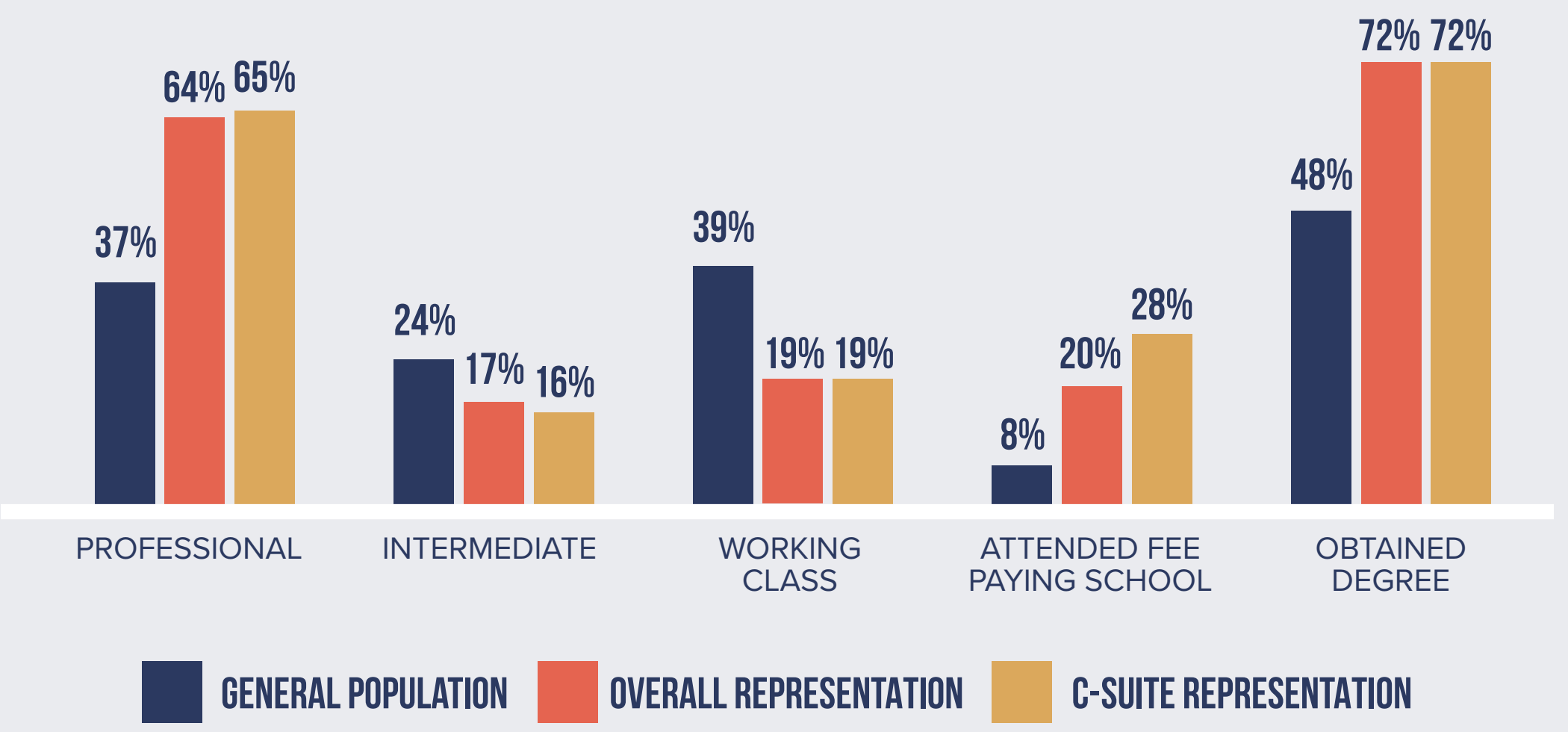
WORKING CLASS ARE
UNDER-REPRESENTED
19% vs 39%
OF WORKING POPULATION



20% vs 8%
THOSE WHO ATTENDED A
FEE PAYING SCHOOL VS
GENERAL POPULATION



REPRESENTATION BY SOCIAL CLASS



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DISABILITY

In our survey, disability status was defined as any respondent answering yes to the following question: Do you have any physical or mental health condition lasting or expected to last 12 months or more that reduces or affects your ability to carry out day to day activities?

Those defined as disabled are under-represented (**9%** vs **14%** in the working population and **20%** in the working age population).

Disability experience is generally poor across the board, highlighting a significant issue with **22%** likely to leave their organisation compared to **9%** industry average.

22% OF THOSE WITH DISABILITIES ARE LIKELY TO LEAVE THEIR ORGANISATION

Whilst the majority of those defined as disabled feel supported by their company (**72%**), there appears to be an issue around awareness as many have not made their company aware of their condition. This is particularly pronounced for non-visible conditions such as stress/ anxiety and mental health.

RESPONDENTS THAT REPORTED A LACK OF AWARENESS FOR THEIR DISABILITY FROM THEIR COMPANY:

46%
STRESS /ANXIETY

45%
MENTAL HEALTH

43%
NEURODIVERSITY

42%
HEARING IMPAIRMENTS

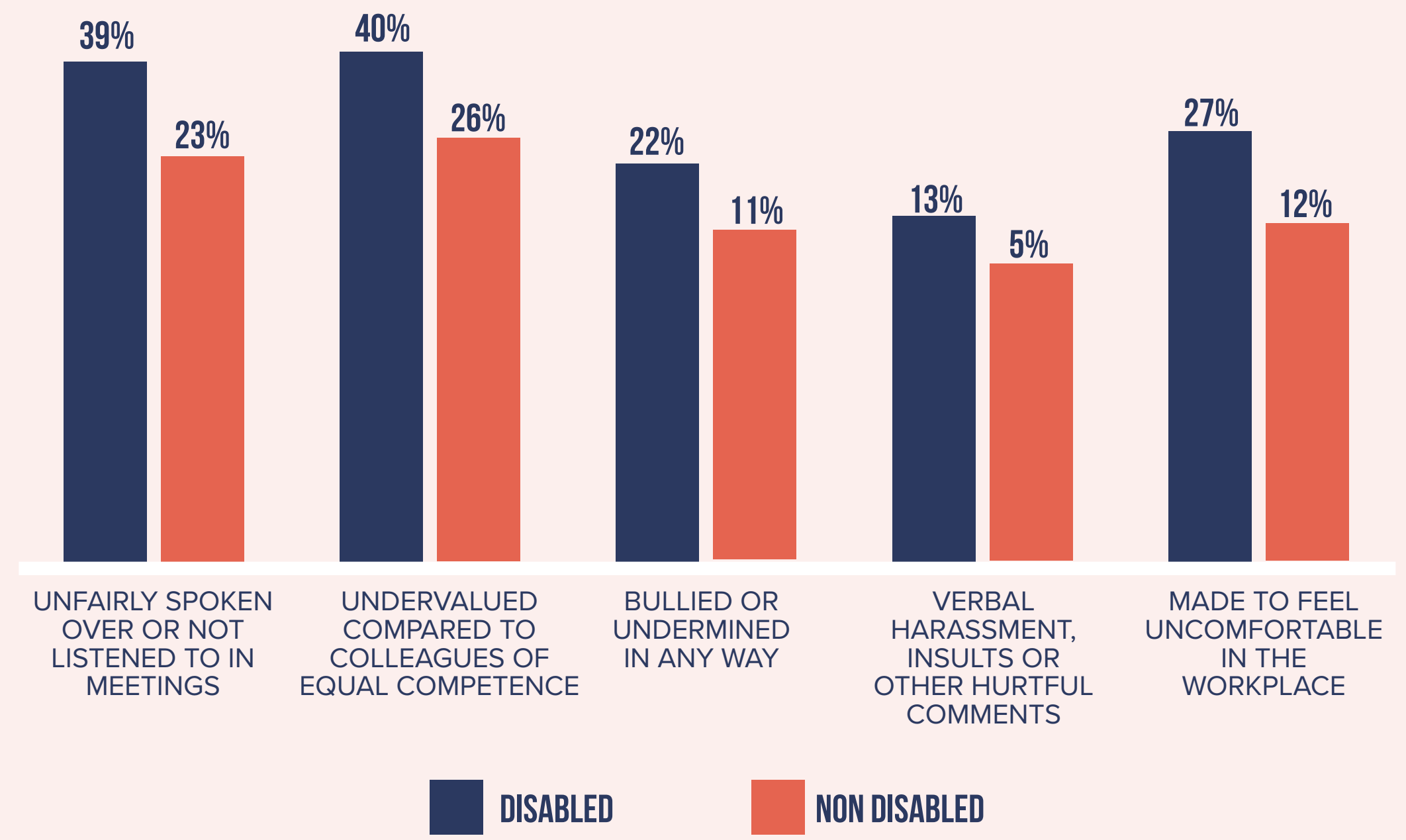
35%
VISUAL IMPAIRMENTS

39%
FATIGUE/LACK OF STAMINA

26%
MOTOR SKILL IMPAIRMENTS

23%
MOBILITY IMPAIRMENTS

% OF PRESENCE OF NEGATIVE BEHAVIOURS



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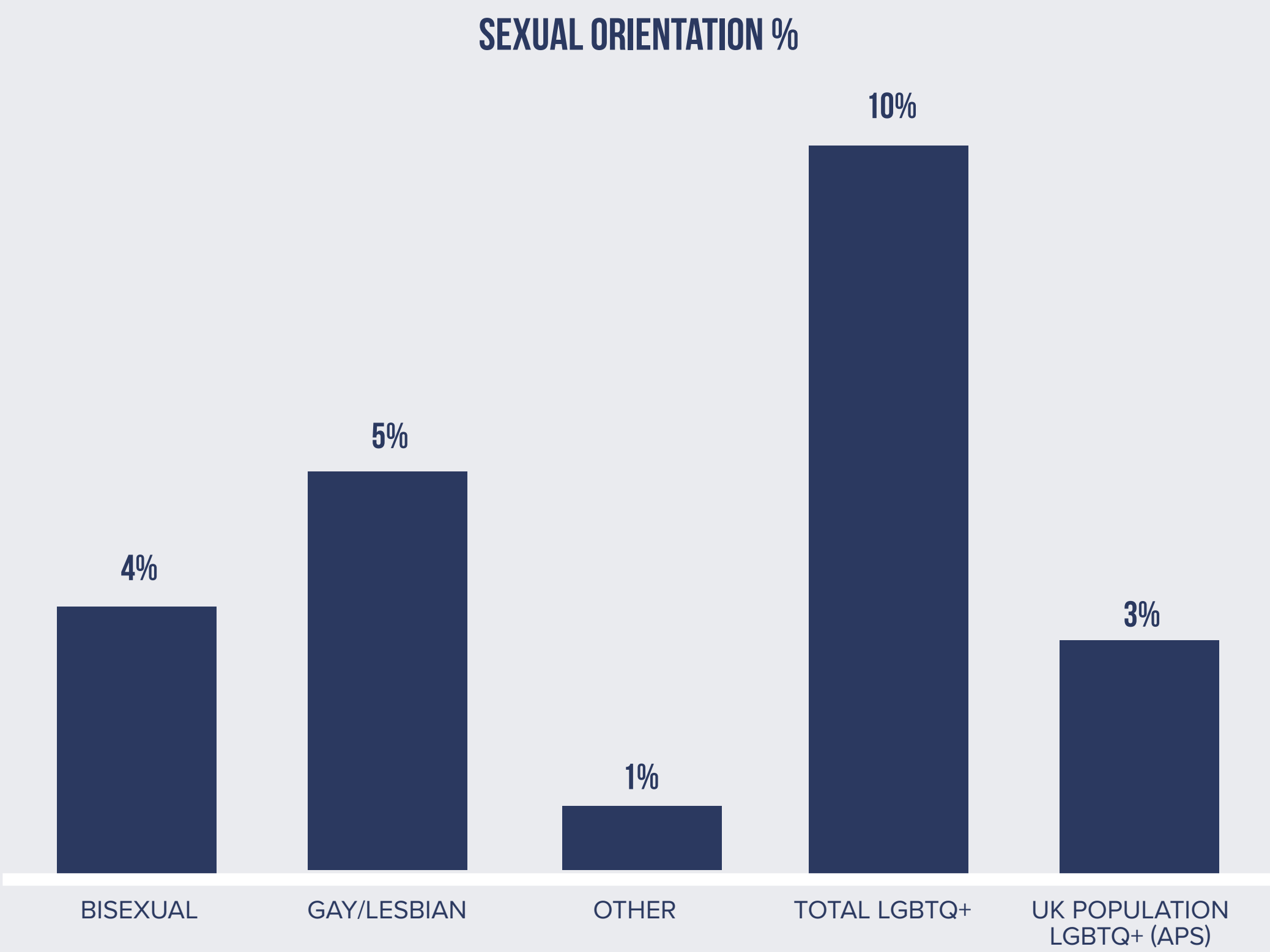
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SEXUAL ORIENTATION

The proportion of respondents identifying as LGBTQ+ in the survey is significantly higher than the UK population average (**10%** vs **3%**). The data indicate this group feel under-represented at senior levels (**38% disagree** with the statement: There are people similar to me in leadership positions across my company compared with **23%** of heterosexual people), although **7%** of C-suite respondents identify as LGBTQ+.



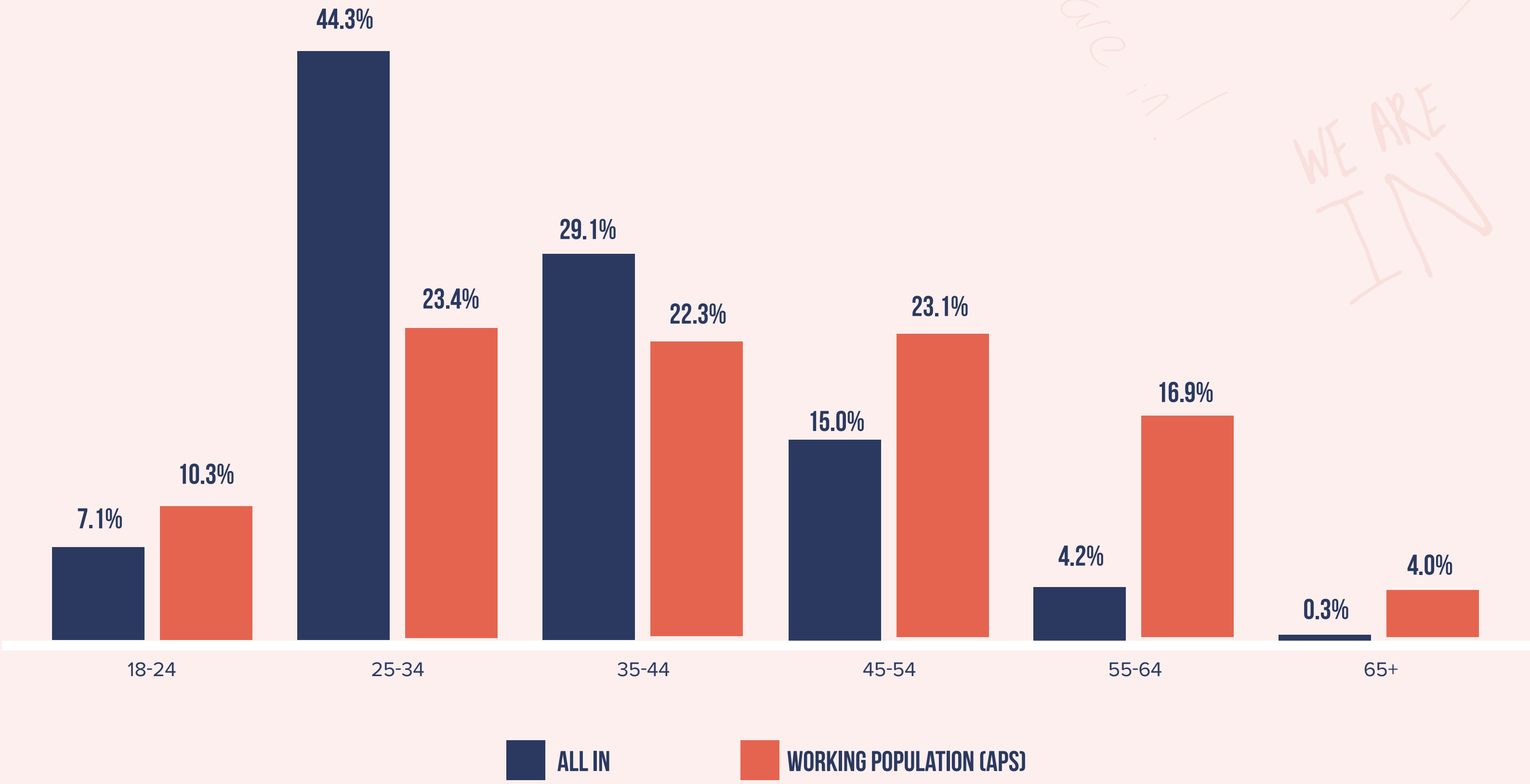
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AGE

The industry’s age profile skews heavily towards the **25-34** and **35-44 age brackets** with nearly three quarters of the sample represented here. This compares with just under half of the UK working population falling into either of these brackets.

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% BY AGE BRACKET



Generally, these younger age groups are more diverse and inclusive – as age increases, so does the prevalence of people identifying as white, male and heterosexual.

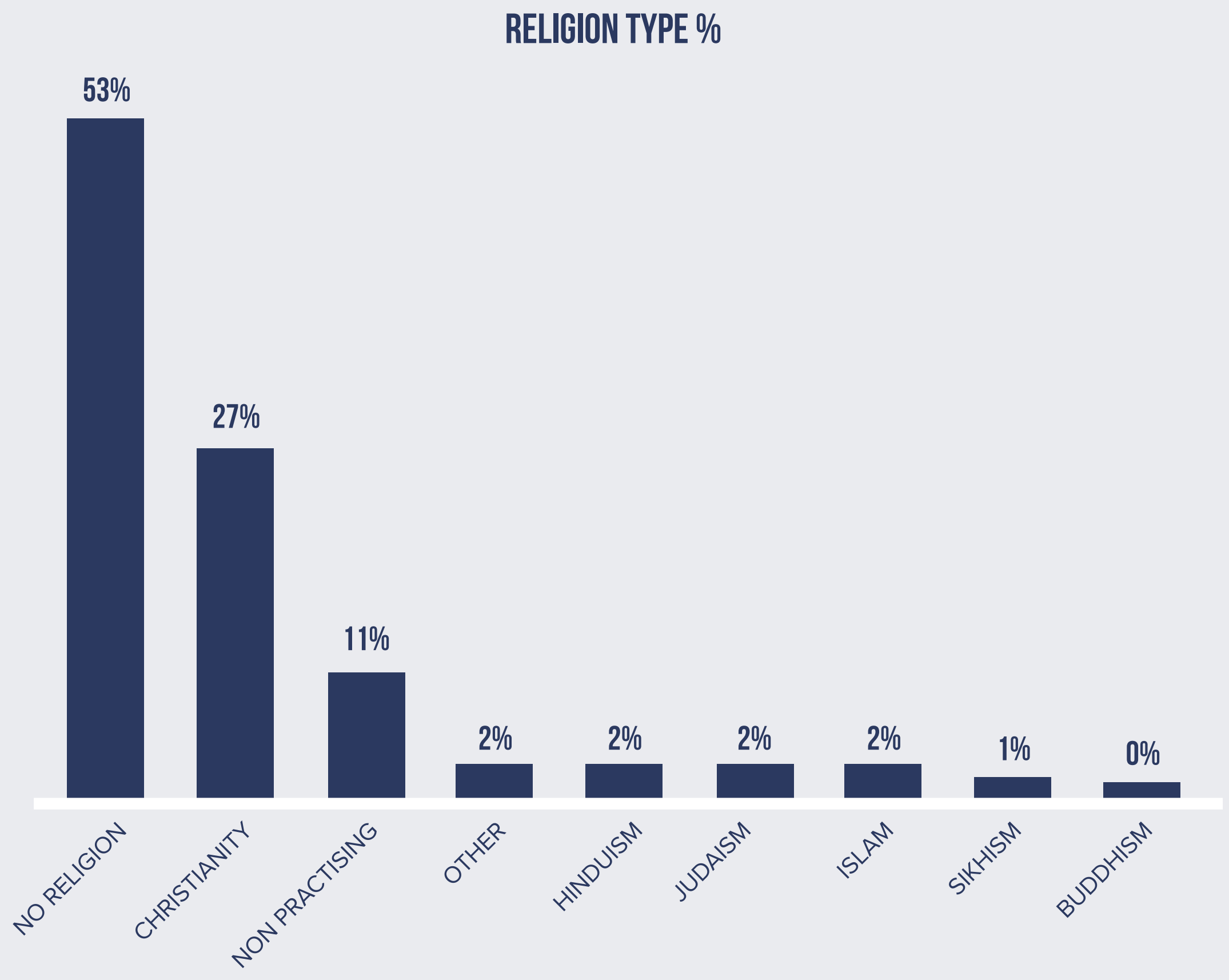
Looking at reported experience by age group, sense of belonging increases with age and we see some frustration in younger age groups around recognition of value vs colleagues of equal competence.

13% of respondents in the **55-64 age bracket** have felt personally discriminated against due to their age. In addition, **40%** of the **45-54** age bracket and **43%** of the **55-64** age bracket feel that age can limit their career.

RELIGION

All main religions are broadly represented in the All In data. There are some common themes across Islam, Sikhism and Hinduism of personal discrimination due to ethnicity and religion leading to comparatively lower feelings of belonging and a higher likelihood to leave the industry based on a lack of inclusion experienced.

Given **85%** of Islam, Sikh and Hindu practitioners identify as Asian ethnicity, religion could be a factor in this group's feeling of exclusion.

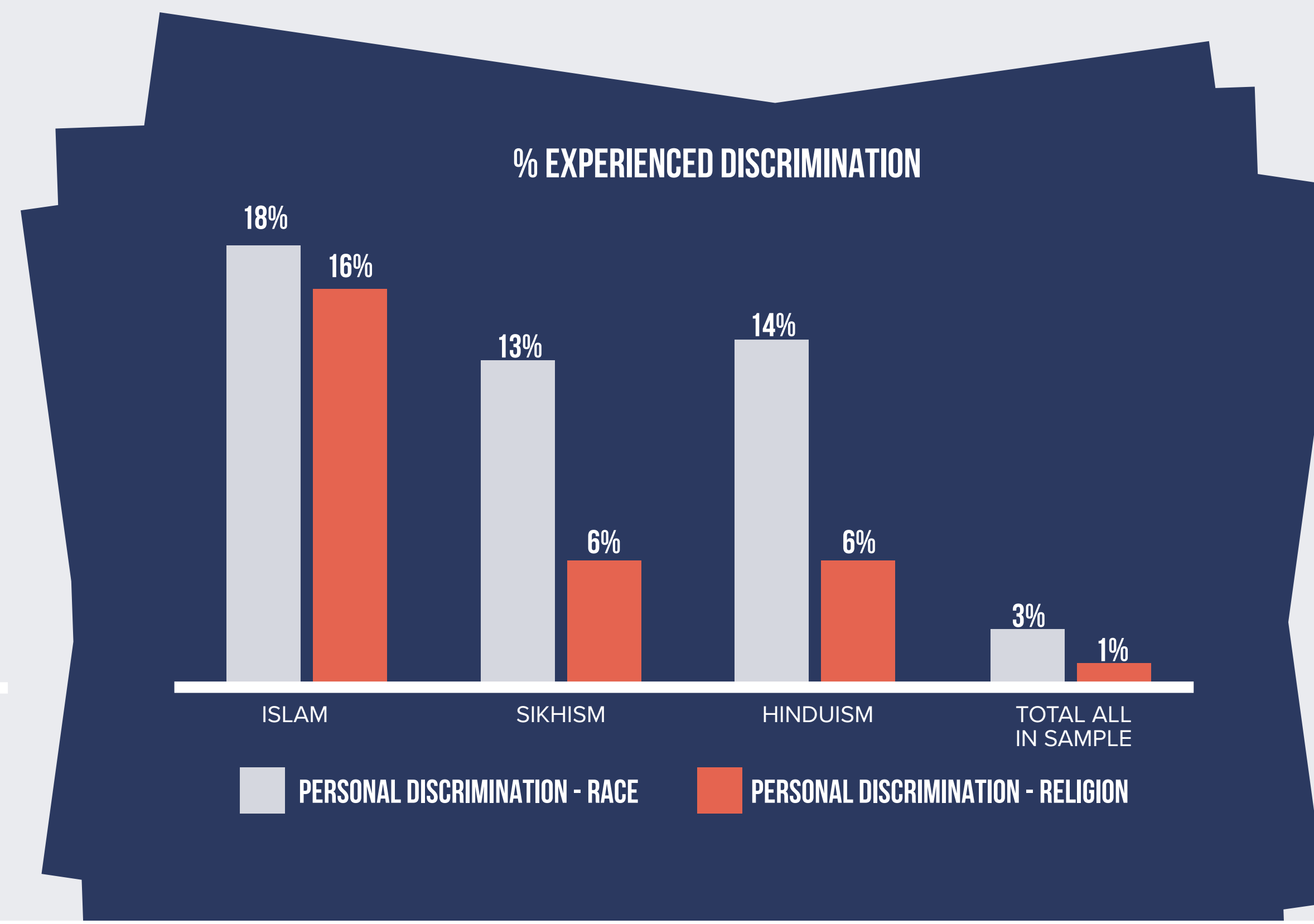


RESPONDENTS LIKELY TO LEAVE THE INDUSTRY BASED ON LACK OF INCLUSION AND/OR DISCRIMINATION:

32%
OF MUSLIMS

27%
OF HINDUS

23%
OF SIKHS



MENTAL HEALTH

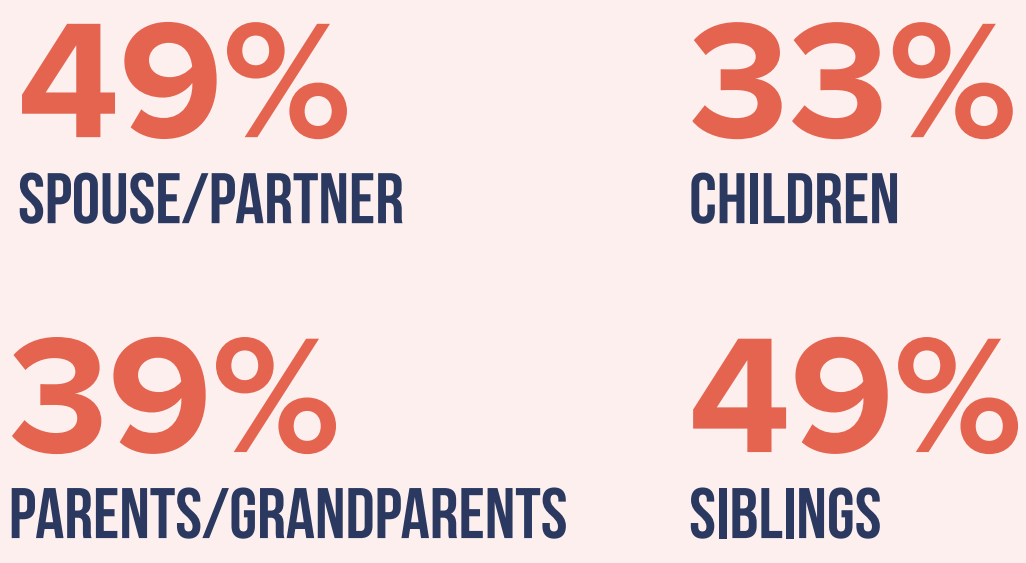
One of the key findings of the survey is the level of stress and anxiety experienced, with **almost a third (31%)** reporting feeling stressed or anxious in the last 12 months. While this is perhaps to be expected with the impact of the global pandemic and altered working practices, it highlights a very important issue for the industry which is impacting a significant proportion of their staff.

In **70%** of these cases, respondents reported that they had not made their company aware of their feelings of stress and anxiety.

Those reporting stress and anxiety tend to skew female and younger and towards care provision - **39% of care providers** are stressed vs **29% of non-carers**.

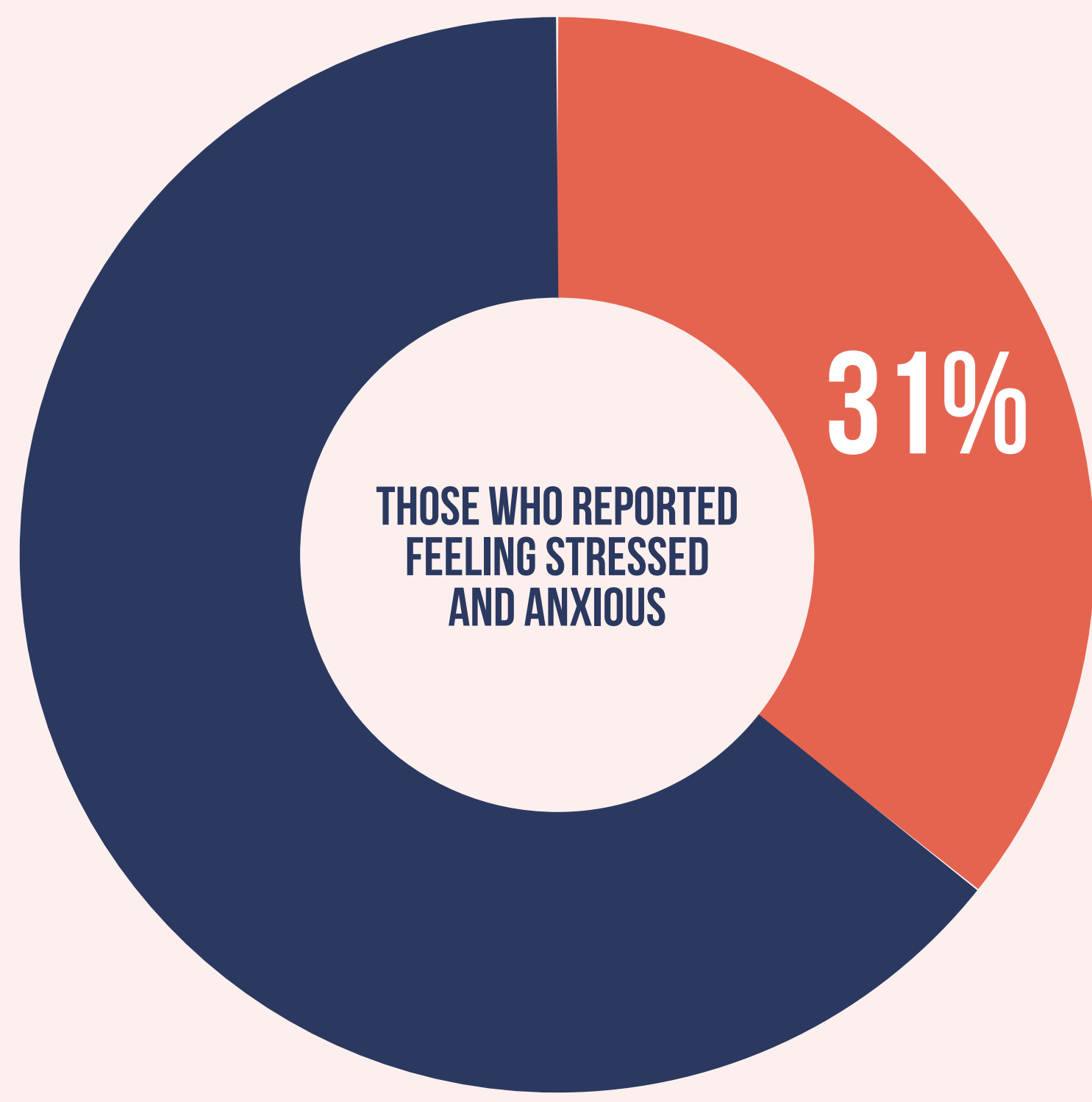
Looking more closely at care givers, stress levels are highest among those caring for spouse/partners and siblings.

% OF CARE GIVERS REPORTING STRESS/ANXIETY:



Building on the point made in the section on disability, for everyone reporting a health condition, we asked if their company was aware of their health concerns. A significant proportion of respondents suffering from stress/anxiety and mental health conditions had not made their company aware suggesting a potential stigma around reporting these issues.

RESPONDENTS THAT REPORTED A LACK OF AWARENESS FOR THEIR MENTAL HEALTH CONDITION FROM THEIR COMPANY:



31%
OF ALL RESPONDENTS
REPORTED FEELING
STRESSED OR ANXIOUS

51%
OF DISABLED PEOPLE

45%
OF LGBTQ+ REPORT HIGHER STRESS
LEVELS VS 30% OF HETROSEXUALS

38%
OF 25-34 YEAR OLDS VS 21%
OF 45-54 YEAR OLDS

36%
WOMEN VS 25% OF MEN

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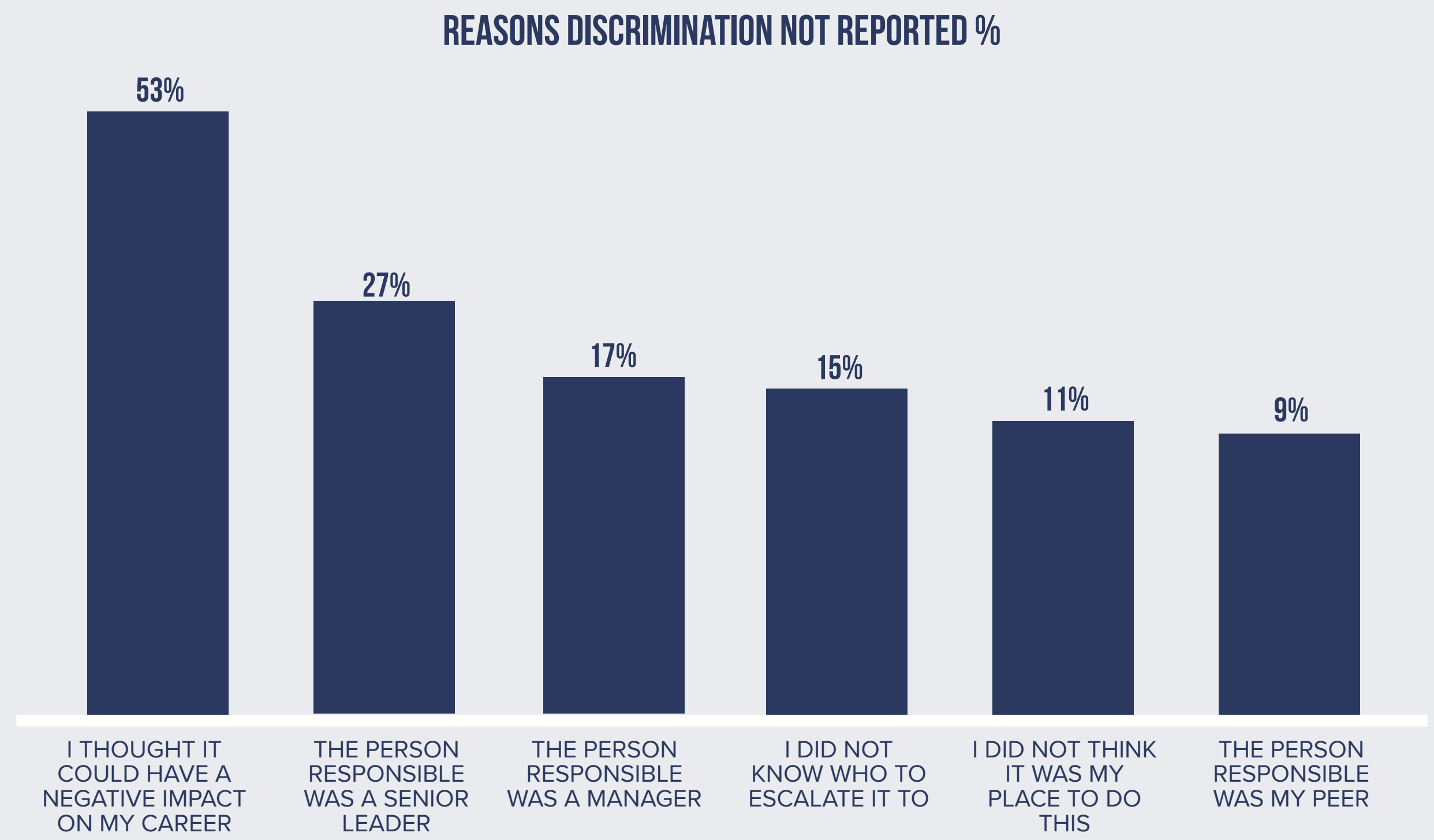
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REPORTING DISCRIMINATION

When looking at instances of discrimination, the levels of reporting to senior management and HR are low. In **38%** of instances where respondents observed some form of discrimination against others, respondents said they were comfortable raising this with senior leaders and HR. This drops to just **26%** of instances of discrimination being reported when it is personal to the respondent. The main reasons cited for not reporting incidents of personal discrimination are thinking it would have a negative impact on someone's career (**53%**) and the person involved was a senior leader (**27%**). Where incidents were reported, just over half (**53%**) were resolved to the respondent's satisfaction.



THE MAIN REASONS
FOR NOT REPORTING

53%
NEGATIVE IMPACT ON
SOMEONE'S CAREER

27%
THE PERSON INVOLVED
WAS A SENIOR LEADER

53%
OF REPORTED INCIDENTS,
WERE RESOLVED TO THE
RESPONDENT'S SATISFACTION



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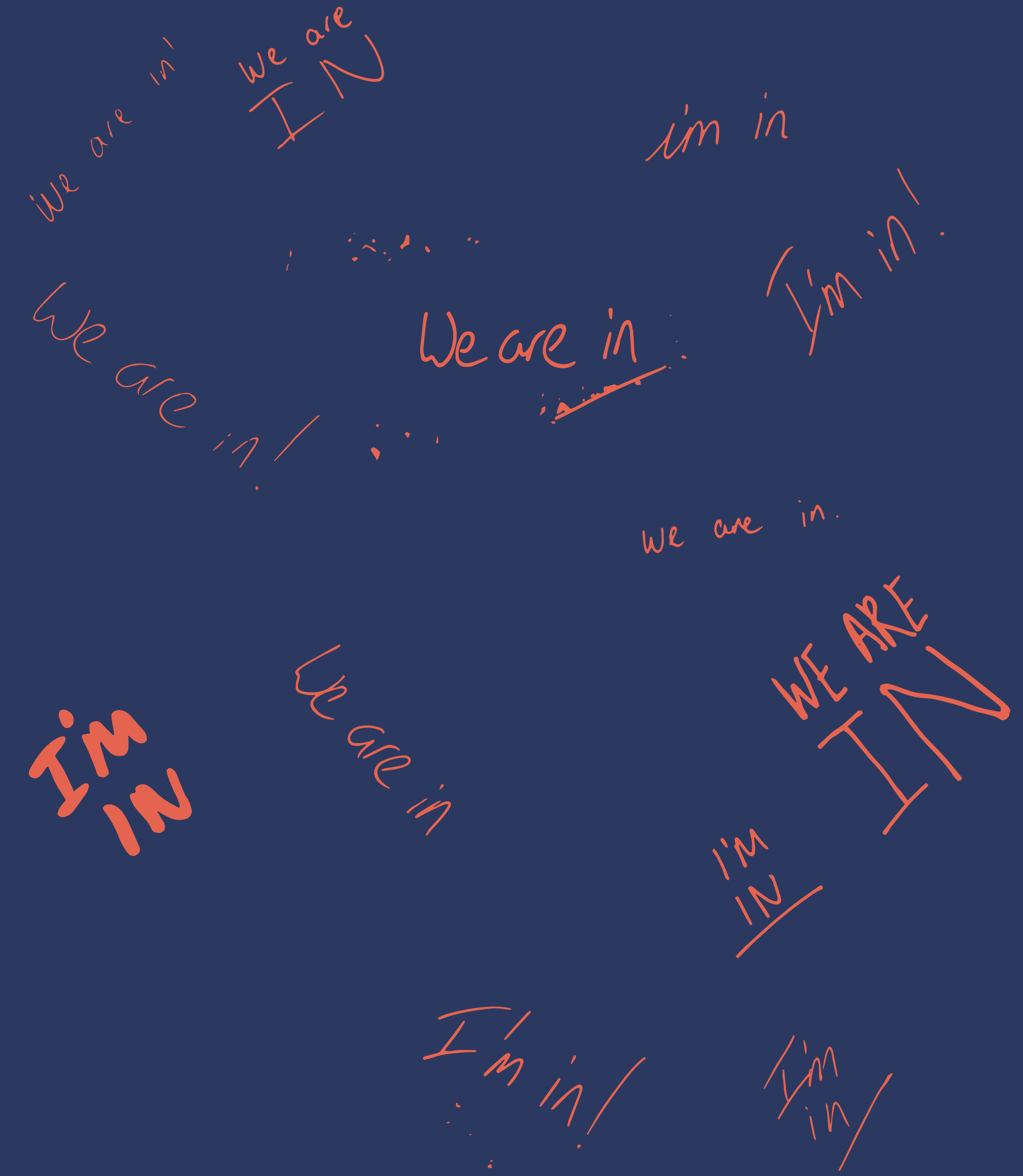
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ACTION 1

IMPROVE THE EXPERIENCE & REPRESENTATION OF BLACK TALENT

DOWNLOAD AND ADOPT THE BRIM FRAMEWORK

1/3 of our Black colleagues in advertising don't feel they belong in our industry – this has to change

ACTION 2

IMPROVE THE EXPERIENCE & REPRESENTATION OF DISABLED TALENT

AUDIT AND UPDATE YOUR COMPANY WEBSITE TO ENSURE ITS ACCESSIBLE TO ALL

One in five advertising practitioners with a disability are likely to leave their company – we have to retain this talent

ACTION 3

IMPROVE THE EXPERIENCE & REPRESENTATION OF TALENT FROM WORKING CLASS BACKGROUNDS

ADOPT THE SOCIAL MOBILITY TOOLKIT

People from a professional/privileged background outnumber working class people by almost two to one – we need to open up our industry to all

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ACTION 4

IMPROVE THE EXPERIENCE & REPRESENTATION OF WOMEN

TAKE THE FLEXIBLE FIRST CHECKLIST

10 x more women than men believed parental leave negatively impacted their career progression

ACTION 5

IMPROVE THE EXPERIENCE & REPRESENTATION OF ASIAN TALENT

START BY USING OUR GUIDE WHICH HAS BEEN DEVELOPED BY THE ALL IN ASIAN WORKING GROUP

27% of Asian respondents reported that they are likely to leave the industry due to a lack of inclusion and/or discrimination experienced

ACTION 6

IMPROVE THE EXPERIENCE & REPRESENTATION OF OLDER TALENT

IMPLEMENT OUR SHARED EXPERIENCES POLICY

Only 4% of respondents were aged 55-64 compared to 17% of the UK working population

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ACTION 7

SUPPORT THE MENTAL HEALTH OF OUR COLLEAGUES

DONATE AND SIGNPOST TO NABS

Two thirds (66%) of those with mental health conditions were aged under 34

ACTION 8

IMPROVE THE EXPERIENCE OF OUR LGBTQ+ TALENT

WELCOME THE USE OF GENDER PRONOUNS IN YOUR ORGANISATION

28% of LGBTQ+ people report a mental health condition vs 12% industry av. and 45% report stress/anxiety

ACTION 9

IMPROVE THE EXPERIENCE OF DISABLED TALENT IN THE WORKPLACE

ADOPT THE BDF ACCESSIBLE PREMISES CHECKLIST

Just 2% of those working in advertising have a physical disability vs 7% of the UK working population

IT'S TIME FOR ACTION

We chose for the first point of our **All In** action plan to focus on improving Black representation in order to activate a plan to combat discrimination, racism and injustice by galvanising our community into action. Our industry aspires to be accessible and fair, to reflect the diverse communities it serves and to shape society in a positive way.

There is currently lots of goodwill and activity; however in order to substantially improve ethnicity stats and people's experiences of our industry, initiatives with both scale and longevity are required. In many cases, direct interventions including target setting at individual organisations and a readjustment of culture and working practices is crucial. Most importantly, Black employees want to know that they are being heard – sharing should be the norm. Employees should feel safe voicing their concerns and opinions, and that insight should be used to design bespoke policies and programmes tailored to the needs of the business in a way that brings out the best in its people.

On an external level, there is so much that can be done. From downloading and adopting the **BRiM Framework** as suggested in this report or thinking about whether we are doing enough to give business to Black owned stakeholders. There are many ways that we can make a difference.

Looking at ethnicity pay gaps is another great way to dig deeper and really understand hidden disparities in one of the biggest markers of an individual's success at work – salary. If you are already monitoring these gaps, how about comparing the salaries of individuals from different ethnic groups who took on similar roles at the same level to see where they have landed. For instance, a White British male graduate and an Asian or Black female graduate both start off at the same pay scale in similar roles – a year or two down the line, how have they fared? Has one been promoted or given a pay rise while the other has not progressed?

I believe that addressing injustice for any protected characteristic – in this case ethnicity and race – plays a huge role in improving the situation for other strands of diversity as well. If we are focusing on Black representation at the current time and we manage to act, not just talk, that will at a later stage have a ripple effect, resulting in overall progress for other minority groups as well.



LEILA SIDDIQI
ASSOCIATE DIRECTOR, DIVERSITY,
IPA

“
OUR INDUSTRY ASPIRES TO BE
ACCESSIBLE AND FAIR, TO REFLECT THE
DIVERSE COMMUNITIES IT SERVES AND
TO SHAPE SOCIETY IN A POSITIVE WAY.
”

WE MUST OPEN UP TO ALL TALENT

There can surely be zero surprises that an industry that for so long, took so much pride in fast tracking CVs from preferred universities and delighted in the power of nepotism, could now be struggling to shake off its class problem. The 'All In' Census findings show that people from working class backgrounds are deeply under-represented in the advertising industry, accounting for just 19 per cent versus 39 per cent of the working population. Our own misdeeds, no doubt, further compounded by the many physical, financial, mental and emotional barriers that prevent social mobility.

So that's the rubbish news.

The good news is there is so much brilliant working class talent out there and this is a talent pool that any great agency or organisation should covet.

Also good news, with our indeterminable marketers ability to navigate challenges, we can absolutely create the change and accelerate real progress. We just need to be focused.

DATA ALWAYS CAPTURED - If you don't have the data you won't know the challenges you have or the progress you are making. Critically data stops us making assumptions. Not all people of colour are from low social mobility nor do middle class accents always suggest a life of middle class privilege. And of course, we have to load intersectionality into the roadmap we are building, and it's impossible to navigate that without data.

OUR WORLD OPENED UP - Our industry is too closed and too complex for too many people from working class backgrounds. We have to get better at explaining our industry and making that information accessible, and we have to get to great talent as early as possible – we must get to schools, to teachers, to the sink estates, to the decaying coastal towns.

REAL INVESTMENT IN THE EXPERTS - There aren't any short cuts when it comes to reaching and keeping working class talent and the challenges are complex. Spend proper money with some of the incredible organisations we are blessed with, such as Commercial Break, Brixton Finishing School and The Ideas Foundation (to name a few). Be mindful they are not just helping us be better employers but need our investment to reach and power up the talent. These organisations are vital to the future of our industry.

SYSTEMIC PROGRAMMES, NOT HEADLINES – Working class talent, before they find us and once in our industry are hitting deep rooted and far reaching challenges every single day, so we have to be equally systemic in our approach to mitigate these challenges; programmes should always be substantive, sustainable and measurable, if they aren't they will quickly fail, heartbreakingly letting down talent who have worked so hard to start their journey in the industry.

And having done all that (and a huge high five to those that do) never forget we're a business where confidence is everyone's secret weapon - and being working class, being different, any kind of different, can make confidence a terrifyingly fragile commodity. So always find good managers, build crews, be generous with your time, power up all your people. The companies that become great at attracting and keeping diverse talent are the ones that will win.



SARAH JENKINS
MANAGING DIRECTOR,
SAATCHI & SAATCHI LONDON



FIND GOOD MANAGERS, BUILD CREWS, BE GENEROUS WITH YOUR TIME, POWER UP ALL YOUR PEOPLE.



INCLUSION IS THE LIFEBLOOD OF CREATIVITY

A SPACE WHERE MINORITIES CAN OPENLY & FREELY EXPRESS

Giving a voice to minority groups has been hardwired into Channel 4 since its inception in 1982.

This has led to some of TV’s most iconic moments – the first Black sitcom in Desmond’s, the first lesbian kiss on Brookside, pioneering LGBTQ+ dramas like Queer As Folk, and our award-winning advertising for the Paralympic Games.

Offering a space where minorities can openly and freely express and reflect their experiences, talent, opinion and lives has probably never been more crucial than it is today.

That’s why the industry’s All In Census and summit, led by the Advertising Association, are so vital if we are committed to making lasting change. Not just for the benefit of people from diverse backgrounds, but for the benefit of everyone in the advertising industry and, most importantly, for the betterment of society.

This won’t happen by accident. We must work harder to make all people feel included, and to seek out talent from diverse backgrounds.

Channel 4’s commitment to embrace difference continues to deliver a huge reach of youthful audiences – from It’s A Sin tackling AIDS; to Ackley Bridge’s honest portrayal of multi-ethnic tensions and friendships; to the mental health storylines on Hollyoaks.

Our desire to encourage others on this journey led to our ground-breaking Diversity in Advertising Award, intended to drive real change in our industry. We are now working on our most ambitious project yet – expanding our diversity focus to the whole TV production industry with “Black To Front” which will see our entire schedule created and fronted by Black talent; not as a gimmick, but as a chance to learn how to hire and grow Black talent in all roles and at all levels in the creative industries.

But why does this matter creatively? I deeply believe that it is only by including people who have different backgrounds, experiences and lives that we stay relevant to audiences, and produce top-class creative work. People with different stories bring new ideas and original approaches.

It also makes business sense. We live in a diverse society, with a need to understand and connect with audiences from a wide range of backgrounds, and with varied experiences. Diverse teams do that better.

But maybe it’s time we stopped thinking of it as diversity and start to see it for what it is – humanity. If we really want to reach our creative potential, we need to include everyone, and that starts with listening.



ZAID AL-QASSAB
CHIEF MARKETING OFFICER,
CHANNEL 4

“

**MAYBE IT’S TIME WE STOPPED
THINKING OF IT AS DIVERSITY
AND START TO SEE IT FOR
WHAT IT IS – HUMANITY**

”

‘ALL IN’ MEANS ‘ALL IN’ AND THEN, ‘ALL UP’

The outcomes of the **All In Census** and the action plan to follow up have to focus on the parts of the industry where we see the least representation: disability, race and the working class. For us at **Creative Equals**, we know there are many areas to focus on when we start going deeper, like faith representation (particularly Muslim and Jewish representation). Whenever we think of any demographic, the key is to take an intersectional approach. No group is a monolith. We have to understand representation at the table isn’t the only answer: no person carries the opinions of their ‘demographic’.

The real question to ask ourselves is: what will stop us making progress on these three areas?

“GOING FORWARDS, IT HAS TO BE ABOUT INCLUSION AND, ABOVE ALL, EQUITY AND ACCESS.”

When it comes to disability, there is a strong fear of the time or effort it takes to provide ‘reasonable adjustments’. A story: in 2019, an exceptional deaf user experience designer applied for our CreativeComeback course. She had been out of work for three years because many employers wouldn’t give her an interview as they simply didn’t know what to do. When she first applied, full confession: we didn’t either. An email exchange revealed her adjustments: she needed a piece of voice-to-text tech in the training session and a quiet space so this could function. That was all. She nailed a role after she completed the course. Why? Her skills were impeccable. As Sulaiman Khan, founder of ThisAbility says: ‘As disabled people, we have to be creative and innovative from a young age to adapt to society’s barriers.’ In this case, the fear of ‘getting it wrong’ from employers is the problem, not the talent.

There has been a motorway of columns written for the industry around racial inequality. Despite all the rhetoric, we have made fledging gains, particularly when it comes to intersectionality (a Major Players study shows the pay for Black women is nearly £20k lower than a White male’s salary at £58K). The answer we often hear from leaders is: ‘We’ll hire interns or apprentices’. There is no point hiring from the bottom with no push for representation at the top. What every business needs to do is unpack bias in the promotion structures and understand ‘everyday’ equity: who gains critical feedback, access to training budgets, key assignments and face time with the CEO.



Lastly, class is the conversation the industry has yet to have, yet it’s the one the industry seems least interested in. Is it perhaps because of the perceived lack of commercial value of this group? It is also the one it understands the least. What makes a person working class? Having a regional accent? Working in a factory? Growing up in poverty? Relying on school dinners? We need to be clear that ‘class’ is a complex, engrained issue, embedded in the UK’s cultural fabric. What other country has institutions such as the House of Lords and the Monarchy? This area needs unpacking at a deep level.

For us, the push for diversity is past. Going forwards, it has to be about inclusion and, above all, equity and access. We need to be clear that the drive for ‘diversity’ is not about one group gaining power at the expense of another: a rising tide of ‘all’ floats all boats. If organisations take this approach (one group is now ‘redundant’), the agenda quickly becomes a zero sum game. **‘All in’ means ‘all in’ and then, ‘all up’.**

INCLUSIVITY, DIVERSITY AND REPRESENTATION

Inclusivity, diversity and representation - three interconnected words that are the **bedrock for the future of our industry**. It's more important than ever that we take these matters seriously, not just because it's the right thing to do but also because there is a business case to prove why.

Understanding the makeup of our industry is key to marking where we are now and where we need to get to. That means every part of the advertising ecosystem has to unite; the brands, agencies, media owners, ad tech companies and consultancies. This is why **ISBA**, the **AA** and the **IPA** have been working together with one common goal **'to create a workplace where everyone can feel they belong.'**

All In has given us critical data to understand where we are now and what action needs to be taken. Despite the results only having been available for a few months we can already see so much progress, with amazing, talented people leading the way.

At **ISBA** our members recognise that there are not enough diverse faces around the table and, consequently, less diversity of thought. Advertising has a vital role in communicating to the country through the powerful messages our brands tell. It needs to tell those stories authentically and this requires a diverse workforce to represent our beautifully diverse population.

Ensuring the industry has the tools for success is key to the **All In** ambition. Inclusion means providing a place where people can belong, a safe and open environment where every voice is equal and heard. For too long there are sectors of our society who do not see people 'like them'. This leads to alienation and exclusion. This has to be more than an ambition, we need to be proactive and promote a diverse and accessible range of career paths to choose from and encourage all types of people to join an industry that will welcome them and help them thrive. **All In** is NOT about ticking boxes, it's about **bringing the industry together** to make the advertising industry a place where we can all belong.



“
ALL IN IS NOT ABOUT TICKING
BOXES, IT'S ABOUT BRINGING
THE INDUSTRY TOGETHER
”

A CRITICAL SNAPSHOT OF OUR INDUSTRY

The pandemic has given us unique views into many of our colleagues' home lives, but it has also magnified social inequalities. Despite some sparks of positive conversation there is evidence that our industry progress on DEI has taken a knock too.

In our day jobs as marketers we know it's important to have detailed insights and effective measurement to drive meaningful change. The All In Census is a critical snapshot of our industry which together with the wider Inclusion Group we've used to inform a clear & measurable plan of action.

It was inspiring to see the positive response the industry had to the survey – the widespread media coverage, the substantial commitments from hundreds of companies, and ultimately the over 16,000 individuals who took the time personally to have their input.

I think it's important that we haven't just captured demographic data, but also a better understanding of personal lived experiences and attitudes right across the industry. Whilst it's a critical step it's not enough just to bring broader diversity into our industry, we also need to ensure that talent is welcomed, setup to thrive, and able to maintain its individuality.

Embracing diverse perspectives and attitudes will help us all be better marketers. It will always be our jobs to advertise to many consumer groups whose lives are quite different to our own experiences, and whilst that's a key skill we can all develop it's made much easier when some of those perspectives are represented in our colleagues. As brand advertisers we will increasingly look to partners who can help us fast track this and bring more of these perspectives in, even as we go on this journey in our own businesses.

Whilst I'm a champion of all aspects of diversity I think meaningful progress comes with focus and that's why I'm excited to see the action plan focussing in on priority issues where we can drive tangible change. Boosting black representation, tackling the prevalent class barriers, and truly making the industry physically accessible are key focuses which we absolutely must solve for.

That said, the survey clearly highlights a much broader range of challenges facing the industry for instance those still affecting women or LGBTQ+ members of our industry. On this front I'm equally excited to see how other organisations will pick up and run with these insights to also drive change and I am confident the likes of **Bloom**, **WACL** and **Outvertising** will continue to do just that.



WE ALSO NEED TO ENSURE THAT
TALENT IS WELCOMED, SETUP TO
THRIVE, AND ABLE TO MAINTAIN
ITS INDIVIDUALITY.





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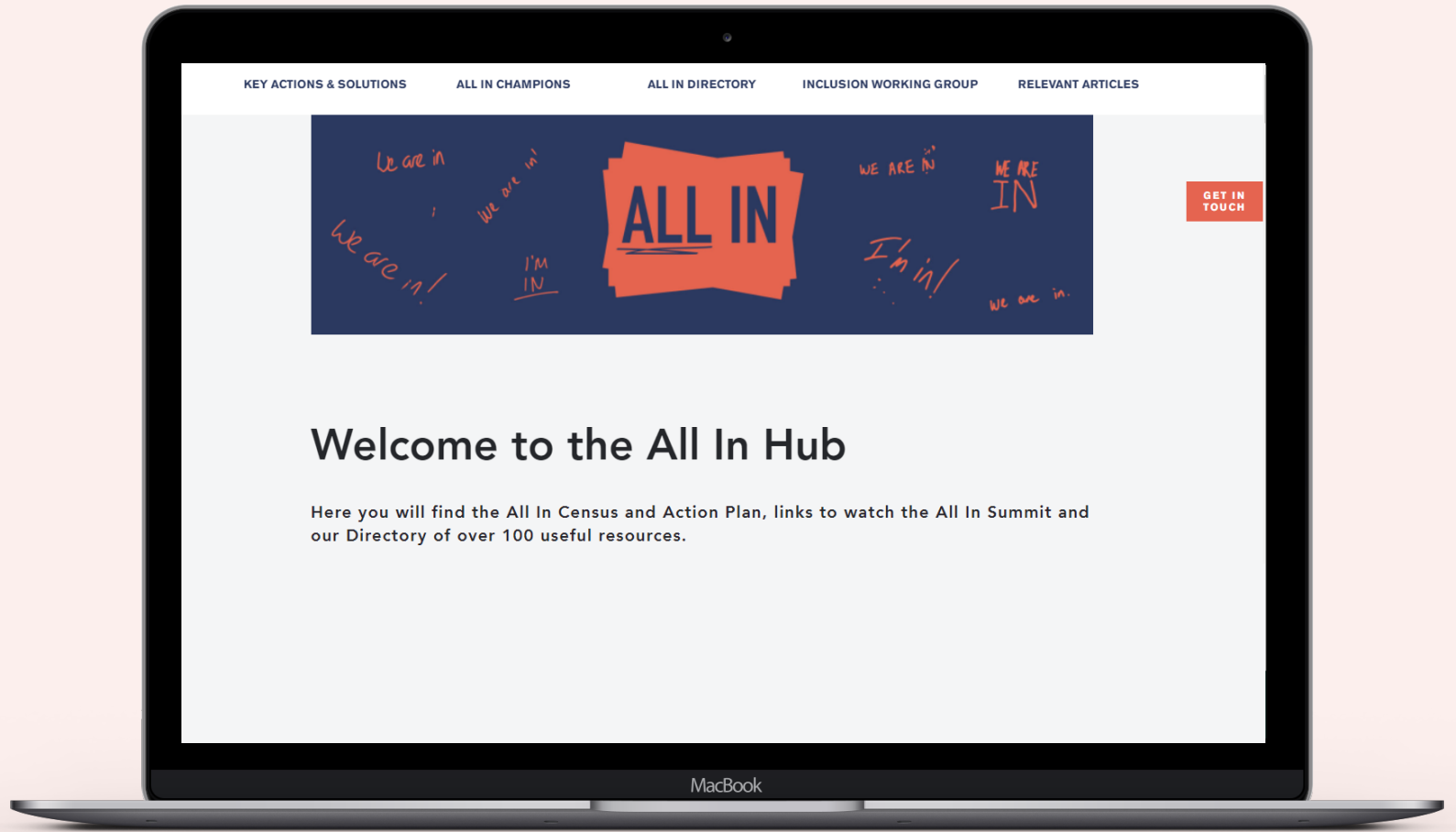


ALL IN HUB & DIRECTORY

ALL IN HUB

Our [All In Hub](#) can be found on the **Advertising Association’s website**.

The Hub houses lots of further information on each specific action including our popular ‘How To sessions’ which feature industry leaders discussing each action, offering guidance and advice on implementation. You can also watch the full launch Summit or the a snapshot of the edited highlights. Furthermore you can find out how to apply for All In Champion status and see details of the Inclusion Working group who have worked tirelessly to make All In a reality. The Hub is constantly updated so please keep checking back for the latest information.



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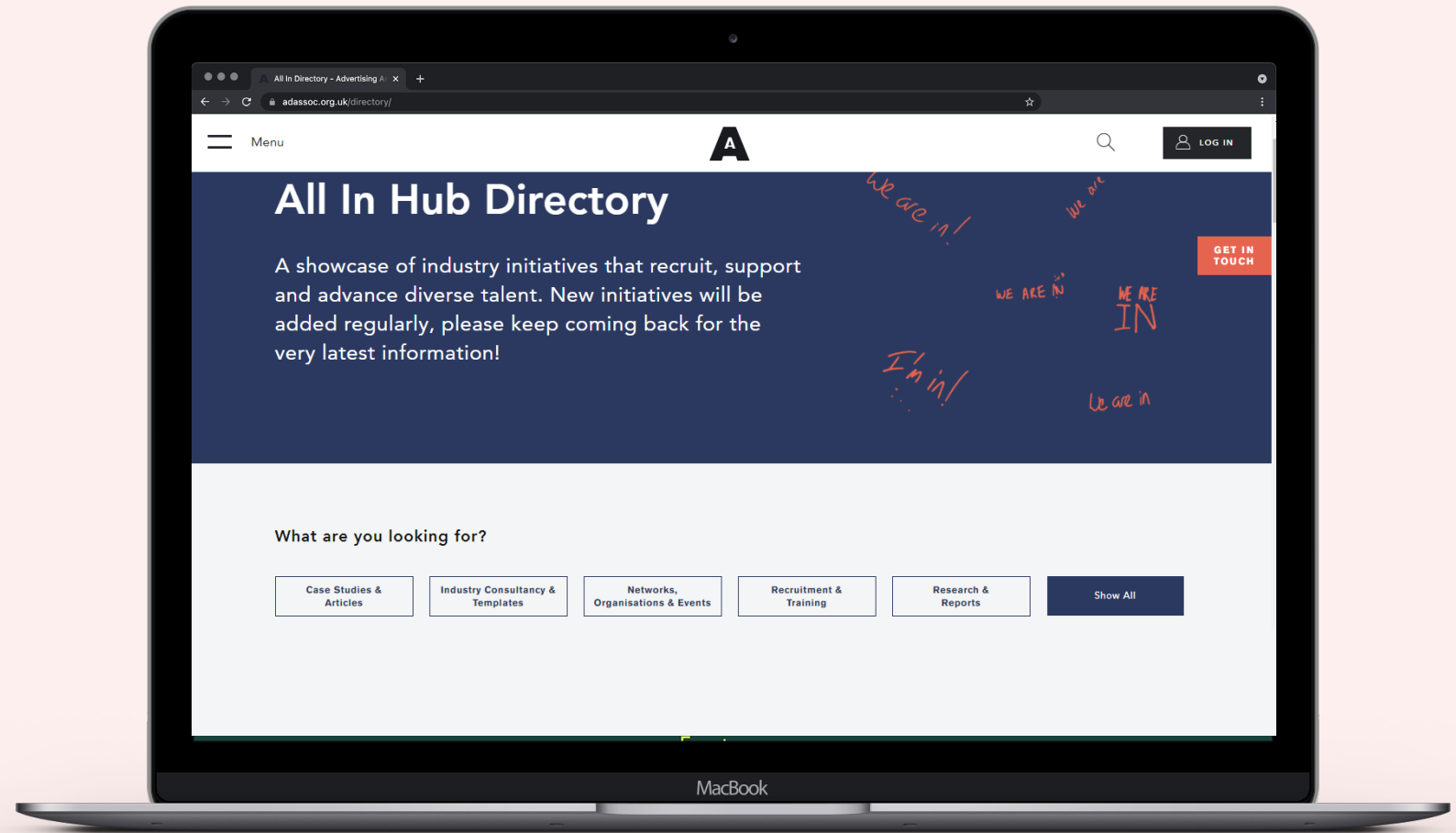
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ALL IN DIRECTORY

The [All In Directory](#) is a showcase of over 100 industry initiatives which recruit, support and advance diverse talent in UK advertising with new resources being added all the time. The Directory is packed with resources to allow businesses to begin their own inclusion journey and also, to help individuals who are looking for support.

The resources have been grouped in easy to navigate categories and the page has been designed with accessibility in mind.





A BIG THANK YOU!

We would like to express our **thanks to all companies who took part** in All In through sharing it and encouraging their colleagues to take part. Our plan for the future would not have been possible without your willingness to participate.

We would also like to thank Kantar for their analysis and support for the survey and their help in bringing this report to completion.

Finally, many thanks to our Inclusion Working Group member companies for their advice and dedication to the aim of making an advertising and marketing industry that better reflects the variety of life, experience and background we see all around us in UK society.

ADVERTISING ASSOCIATION

CHANNEL 4

CREATIVE EQUALS

GSK

IPA

ISBA

PEARL & DEAN

SAATCHI & SAATCHI

ALL IN CHAMPIONS

In order to encourage swift action, the Inclusion Working Group has introduced a process for companies to apply to become All In Champions. You will need to demonstrate implementation across all of the actions in return for materials which can be used in company credentials. Further information can be found on the All In Hub. For further information on how to get involved in All In please contact Sharon.LloydBarnes@adassoc.org.uk

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SURVEY METHODOLOGY AND TIMING

The All In Census ran from 10 – 22 March 2021.

A total of 16,016 responses were received. Whilst precise figures for the total industry are hard to come by, we believe this response represents just under 20% of the overall UK Advertising industry population.

The survey was administered via an open online link which was shared within each participating organisation and the survey was heavily trailed and promoted on social media.

All responses given are totally anonymous with nothing attributed back to the individual respondent.

TREATMENT OF QUESTIONS NOT ANSWERED

Given the sensitive data of some of the questions, every question was able to be skipped or had a prefer not to say option. In such instances, these responses have been excluded from the % calculations in the report.

SAMPLE PROFILE

No weighting has been applied to the data, however comparisons to existing industry data shows the sample to be broadly representative, with a slight over representation of women in the sample (59% vs working population 48%).

An overall summary of the sample profile by each of the protected characteristics is as follows:

DIVERSITY CHARACTERISTIC		ALL IN	WORKING POPULATION	GENERAL POPULATION
GENDER	MALE	40.9%	52.2%	49.4%
	FEMALE	58.7%	47.8%	50.6%
DISABILITY	DISABLED	9.2%	20.0%	23.8%
	NOT DISABLED	90.8%	80.0%	76.2%
ETHNICITY	ASIAN	6.7%	6.2%	6.5%
	BLACK	3.4%	2.9%	3.2%
	MIXED/MULTIPLE	5.1%	1.4%	2.0%
	OTHER ETHNIC GROUP	0.8%	1.4%	1.5%
	WHITE	83.9%	88.1%	86.8%
	ANY ETHNIC MINORITY	16.1%	11.9%	13.2%
AGE	18-24	7.1%	10.3%	10.4%
	25-34	44.3%	23.4%	17.2%
	35-44	29.1%	22.3%	16.2%
	45-54	15.0%	23.1%	17.0%
	55-64	4.2%	16.9%	15.9%
	65+	0.3%	4.0%	23.3%
SEXUAL ORIENTATION	HETEROSEXUAL/STRAIGHT	90.4%	-	97.0%
	LESBIAN/GAY/BISEXUAL/OTHER	9.6%	-	3.0%
RELIGION OR BELIEF	CHRISTIAN	27.4%	44.1%	47.8%
	NO RELIGION	53.4%	47.9%	43.2%
	FROM ANY RELIGIOUS HERITAGE, BUT NON PRACTISING	10.7%	-	-
	MUSLIM	1.6%	3.1%	4.4%
	OTHER	2.3%	1.7%	1.5%
	HINDU	1.8%	1.7%	1.5%
	JEWISH	1.7%	0.5%	0.6%
	SIKHISM	0.8%	0.7%	0.6%
QUALIFICATION	DEGREE OR EQUIVALENT	72.0%	48.1%	42.2%
	PROFESSIONAL	64.1%	37.0%	-
	INTERMEDIATE	16.6%	35.0%	-
	WORKING CLASS	19.3%	29.0%	-
SCHOOL TYPE	INDEPENDENT OR FEE PAYING	19.7%	-	7.5%

All UK population benchmarking data in this report is taken from one of the following sources:

- Working population and general population estimates sourced from Annual Population Survey, ONS (Jan-Dec 2020).
- Disability data for UK working age population from Disabled People in Employment, DWP (2021)
- Sexual orientation estimates from Annual Population Survey (Jan-Dec 2018)
- Attended independent/fee paying school between the ages 11-16 from Schools, Pupils and their characteristics, DfE (Jan 2019)
- Parent's occupation at 14 data from Labour Force Survey (Oct-Dec 2020)



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The Inclusion Index is a holistic measure comprised of two parts: the Inclusion Score and the Diversity Score.

INCLUSION SCORE

The Inclusion score is derived from three sections within the questionnaire; the Company Sense of Belonging Score; the Absence of Discrimination Score; and the Presence of Negative Behaviour Score.

The Inclusion Score is calculated using the following formula:

$$\text{Company Sense of Belonging} + \text{Absence of Discrimination} - \text{Presence of Negative Behaviour}$$

The Company Sense of Belonging Score is defined by eight statements. Each of these statements is measured on a five-point scale where ‘agree’ and ‘strongly agree’ signal a strong sense of inclusion, belonging, attachment, and being valued. The score is calculated by using the sum of these top-two boxes for each of these eight statements. The Company Sense of Belonging Score, for example, has a maximum score of 800. It can be turned into a percentage to allow for simpler interpretation. For example, it is possible to say that “X% of individuals have a positive sense of belonging within this company”.

The Absence of Discrimination Score, the second part of the Inclusion Score, is defined by a set of seven statements where it measures total discrimination and identifies the underlying dimensions of discrimination experience across a wide variety of characteristics including gender, sexual orientation, ethnicity, religion, health and wellbeing, age, and social class. This score is the per cent of people who have not experienced negative discrimination on each of these seven characteristics, with a maximum score of 700. The Absence of Discrimination Score can be turned into a percentage to allow for simpler interpretation. For example, it is possible to say that “X% of individuals have not experienced negative discrimination within this company”.

We measure discrimination separately from belonging because people can feel a sense of belonging in certain circles and simultaneously discriminated against in others. Thus, it is important to measure both aspects.

Presence of Negative Behaviour is defined by six statements, identified through factor analysis, to identify the underlying dimension of negative behaviours that were developed through six different situations. This index is the per cent of people who have experienced those negative behaviours in those situations, leading to a maximum score of 600. The Presence of Negative Behaviour Score can then be turned into a percentage to allow for simpler interpretation. For example, it is possible to say that “X% of individuals have experienced negative behaviours within this company” or “X% of individuals have been bullied or harassed within the last 12 months in this company”

DIVERSITY SCORE

The Diversity Score, the second part of the Inclusion Index, is measured by first calculating the number of people in a minority or a historically disadvantaged group in a country/company. In previous iterations, diversity was measured by focusing solely on minority representation, meaning the index would continue to rise as minority group representation increased. Measuring diversity that way is problematic because in any group where there is high concentration of a given minority status group, the Diversity Score will be high, while not reflecting being truly diverse. For example, an all-female sewing shop or occupations with high numbers of immigrant workers might receive a high but erroneous Diversity score. In an ideal situation the Diversity Score only increases until each minority group achieves a benchmark, which has been calibrated to reflect the natural diversity found in that society. Once these percentages are realised, the Diversity Index Score for that company will no longer continue to rise and will in fact actually begin to fall as former minority groups become dominant.

INCLUSION AND DIVERSITY TOGETHER

Once the Inclusion Score and the Diversity Score have been calculated, the following equations are used to determine The Inclusion Index:

This calculation will generate a value between 0 and 1, which is then turned into a percentage for easier interpretation.



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SOCIAL MOBILITY COMMISSION DEFINITIONS

IN ORDER TO ALLOCATE RESPONDENTS TO A SOCIAL ECONOMIC BACKGROUND, WE ASKED:

What was the occupation of your main household earner when you were aged about 14?

The following options were given, with the resultant social economic code allocated in **bold type**.

- Modern professional & traditional professional occupations such as: teacher, nurse, physiotherapist, social worker, musician, police officer (sergeant or above), software designer, accountant, solicitor, medical practitioner, scientist, civil / mechanical engineer. **[code=professional background]**
- Senior, middle or junior managers or administrators such as: finance manager, chief executive, large business owner, office manager, retail manager, bank manager, restaurant manager, warehouse manager. **[code=professional background]**
- Clerical and intermediate occupations such as: secretary, personal assistant, call centre agent, clerical worker, nursery nurse. **[code=intermediate background]**
- Technical and craft occupations such as: motor mechanic, plumber, printer, electrician, gardener, train driver. **[code=working class background]**
- Routine, semi-routine manual and service occupations such as: postal worker, machine operative, security guard, caretaker, farm worker, catering assistant, sales assistant, HGV driver, cleaner, porter, packer, labourer, waiter/waitress, bar staff. **[code=working class background]**
- Long-term unemployed (claimed Jobseeker’s Allowance or earlier unemployment benefit for more than a year) **[code=working class background]**
- Small business owners who employed less than 25 people such as: corner shop owners, small plumbing companies, retail shop owner, single restaurant or cafe owner, taxi owner, garage owner **[code=intermediate]**
- Other such as: retired, this question does not apply to me, I don’t know **[code=exclude]**
- I prefer not to say **[code=exclude]**

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