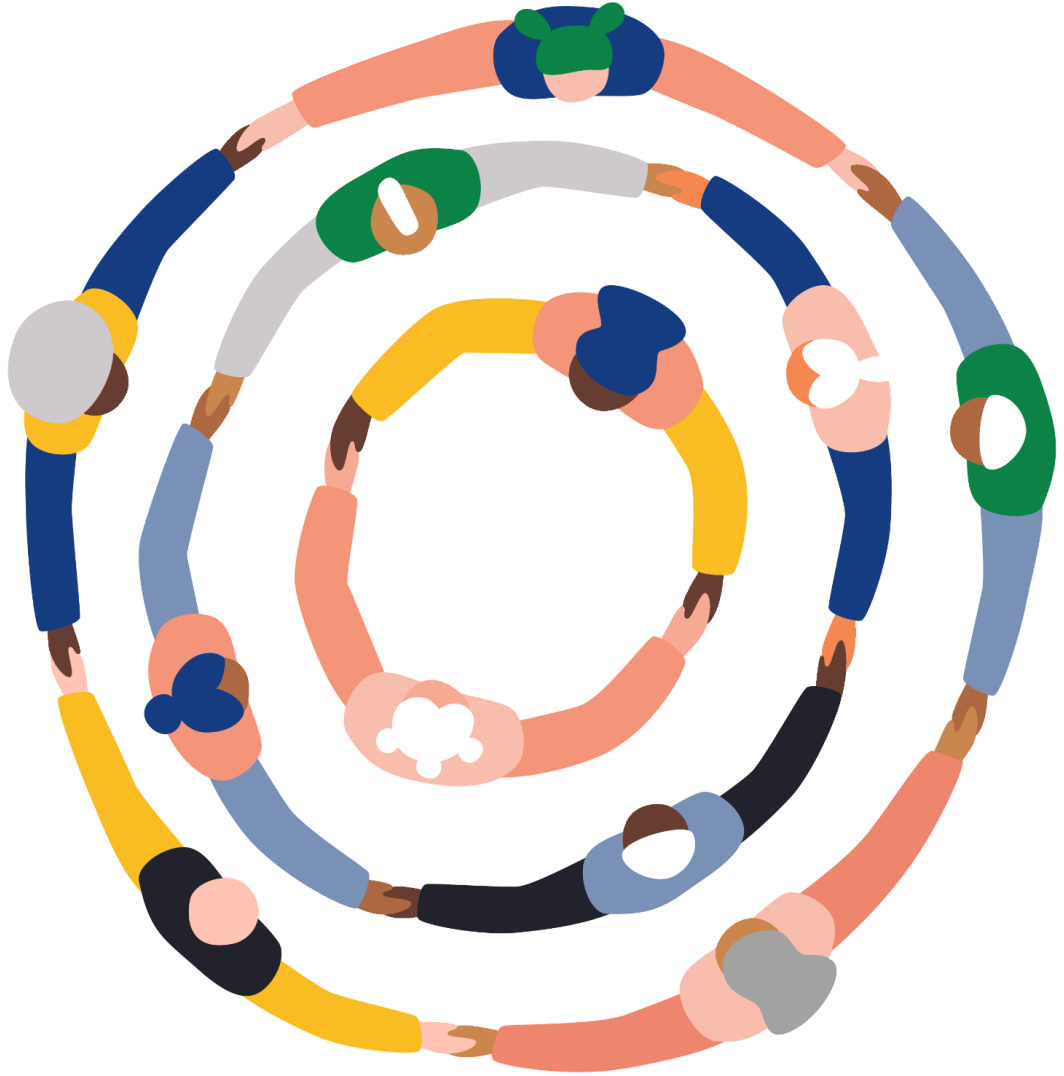


# KANTAR

## The Global DEI Census

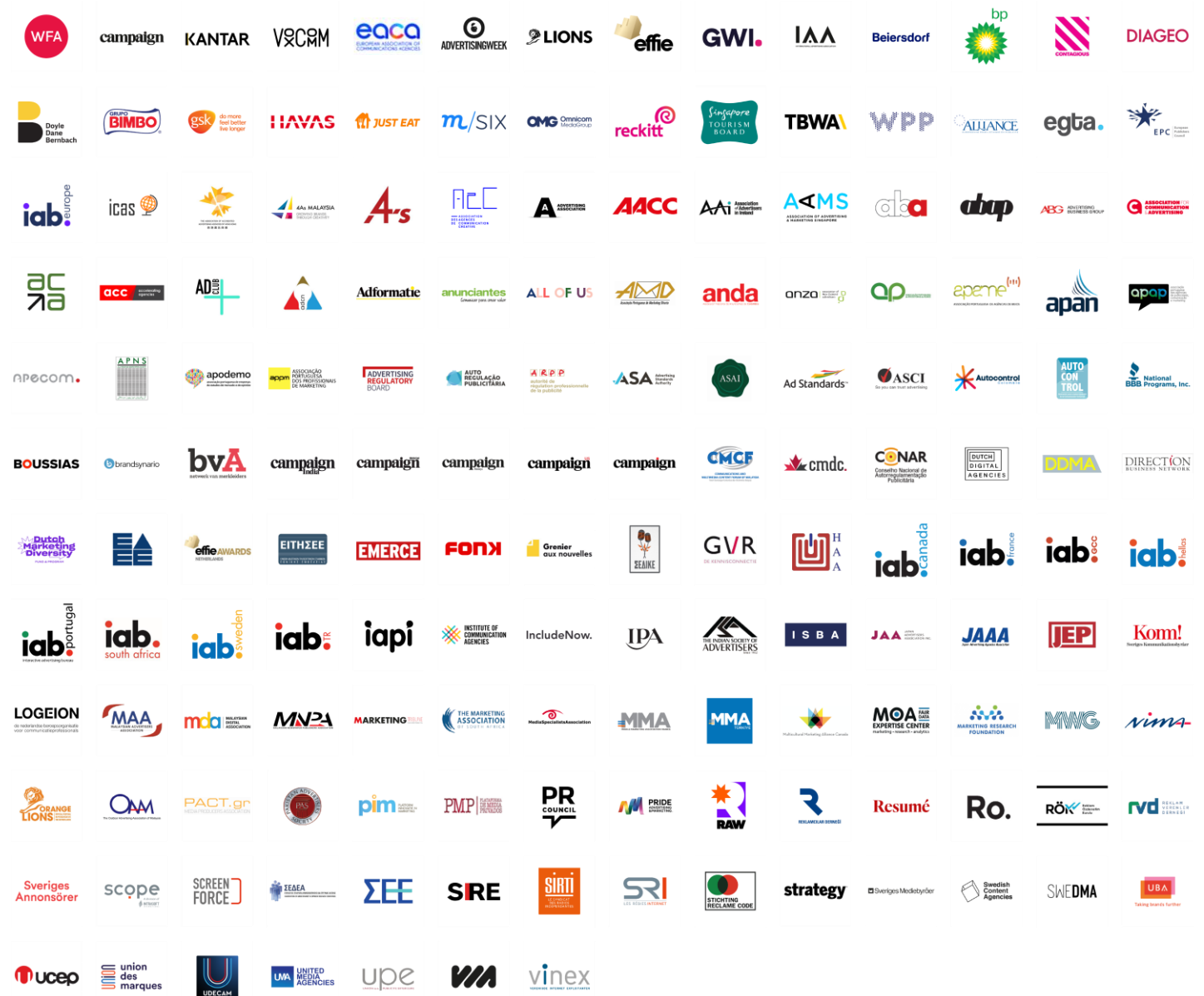
Spain market report



## Acknowledgements

We would like to express our gratitude to all organisations who took part in this collective effort. Without their support we would not have been able to conduct this historic first-ever global research.

A special word of thanks goes to the three organisations behind the *All In* census in the UK in March 2021 – the Advertising Association, ISBA and IPA – and which gave us the courage and the learnings to run a similar study globally.



# Headlines

## Diversity Headlines

- The respondent profile is largely representative of the Spanish demography. However, those respondents reporting a disability and males are largely underrepresented.
- Both men and women acknowledge organisational proactivity in taking steps to become more inclusive and diverse, however more women adopt this viewpoint than men.
- There is a large gender pay gap across most job levels with only women junior managers paid more than men.

## Inclusion Headlines

- Women respondents reported a low sense of belonging compared to men. This is likely to be driven by a decreased belief that inappropriate behavior would be escalated as well as perceiving more career obstacles than men.
- National minorities report a high sense of belonging (91%) and are more likely to agree that their organisation is taking action to become more diverse and inclusive (74%).
- Whilst reporting little discrimination, disabled respondents perceived significantly greater number of obstacles than their non-disabled counterparts (+17%). Despite this, they felt as if they belong in their organisations and adopted heightened belief in inappropriate behavior escalation than their peers.
- Those identifying as religious minority experienced the lowest sense of belonging scores from the deep dive topics. This could be due to the underlying perception that they face more career obstacles and lack of behavior escalation, in comparison to their religious majority peers.
- LGBTQ+ individuals reported the most personal discrimination. However, they also reported the highest sense of belonging in their organisations, potentially resultant from the heightened belief that inappropriate behavior would be escalated, in comparison to their majority counterparts.
- Age and family status are seen to be leading to inequality and career hinderance – this view is adopted more by women than men.

# 1. Demographics and Index Overview



## Spain

**OVERALL RESPONSES = 291**

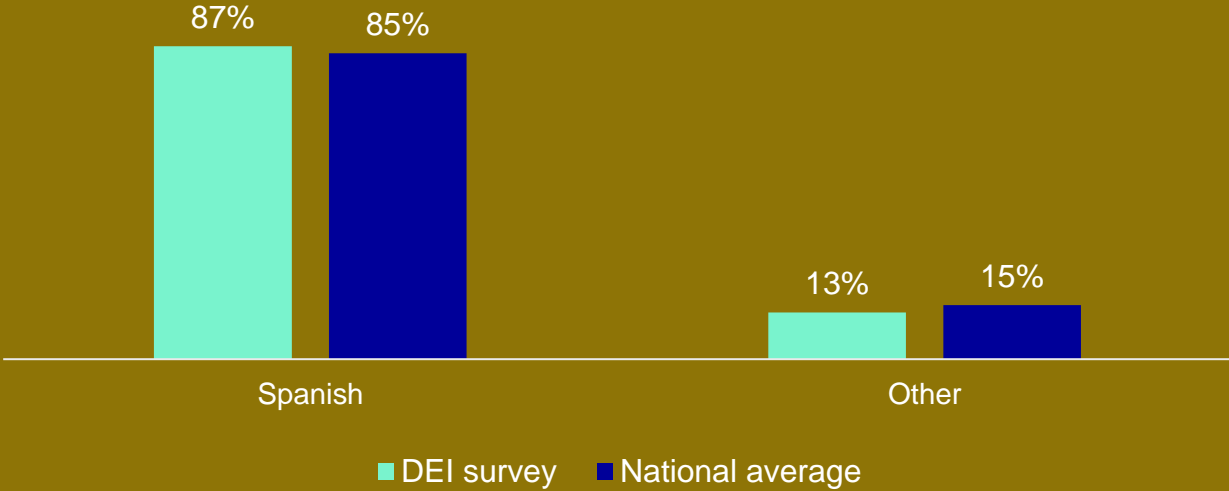
Company type	%
Brand (e.g. P&G, Unilever, etc.)	43
Creative agency	14
Media agency	13
Media/Tech	3
Industry association/trade body	6
Production House	3
Research/insights agency	4
I am a freelancer	1
Media – ad sales	6
Other	7

Gender

	Women	Men	Gender non-conforming
DEI survey	59%	40%	*
National Average*	51%	49%	-

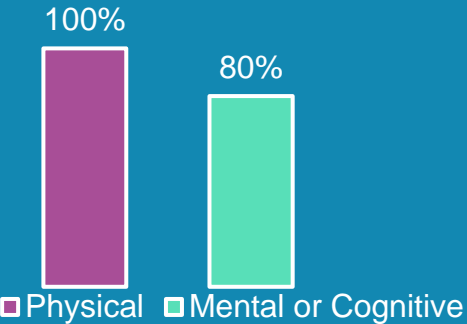
\*taken from national census data

Nationality

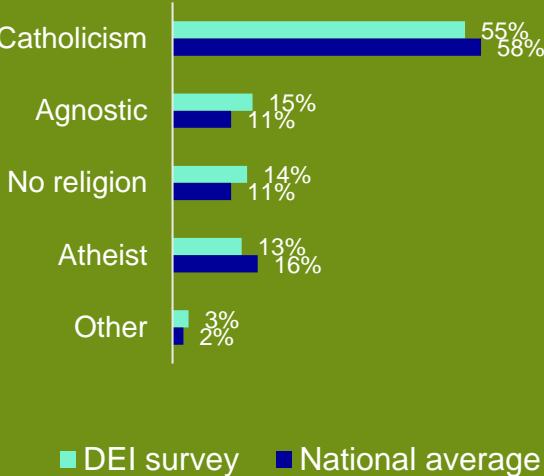


Disability Status

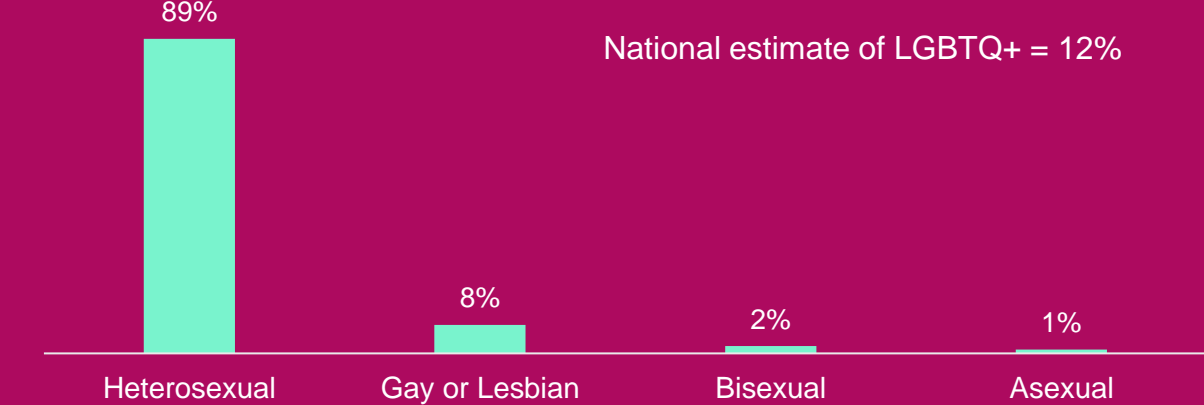
2% of respondents are disabled  
Compared to 8.5% National Average



Religion



Sexual Orientation



## About the Inclusion Index

The Inclusion Index is comprised of three sub-indices created through factor analyses, based on an employee's perception of the environment and their experience at the company.

- Sense of Belonging
- Absence of Discrimination
- Presence of Demeaning Behavior

While there are many diversity dimensions to consider, the Inclusion Index is based on these five: gender, ethnicity, sexual orientation, religion and disability\*.

The Inclusion Index Score is the following formula:

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

\*Note this will vary by market depending on questions asked

## Inclusion Index

	Overall Inclusion Index
Spain	69%
Global average	64%

	Sense of Belonging	Absence of Discrimination	Presence of Demeaning Behaviour
Spain	70%	97%	15%
Global average	68%	96%	18%



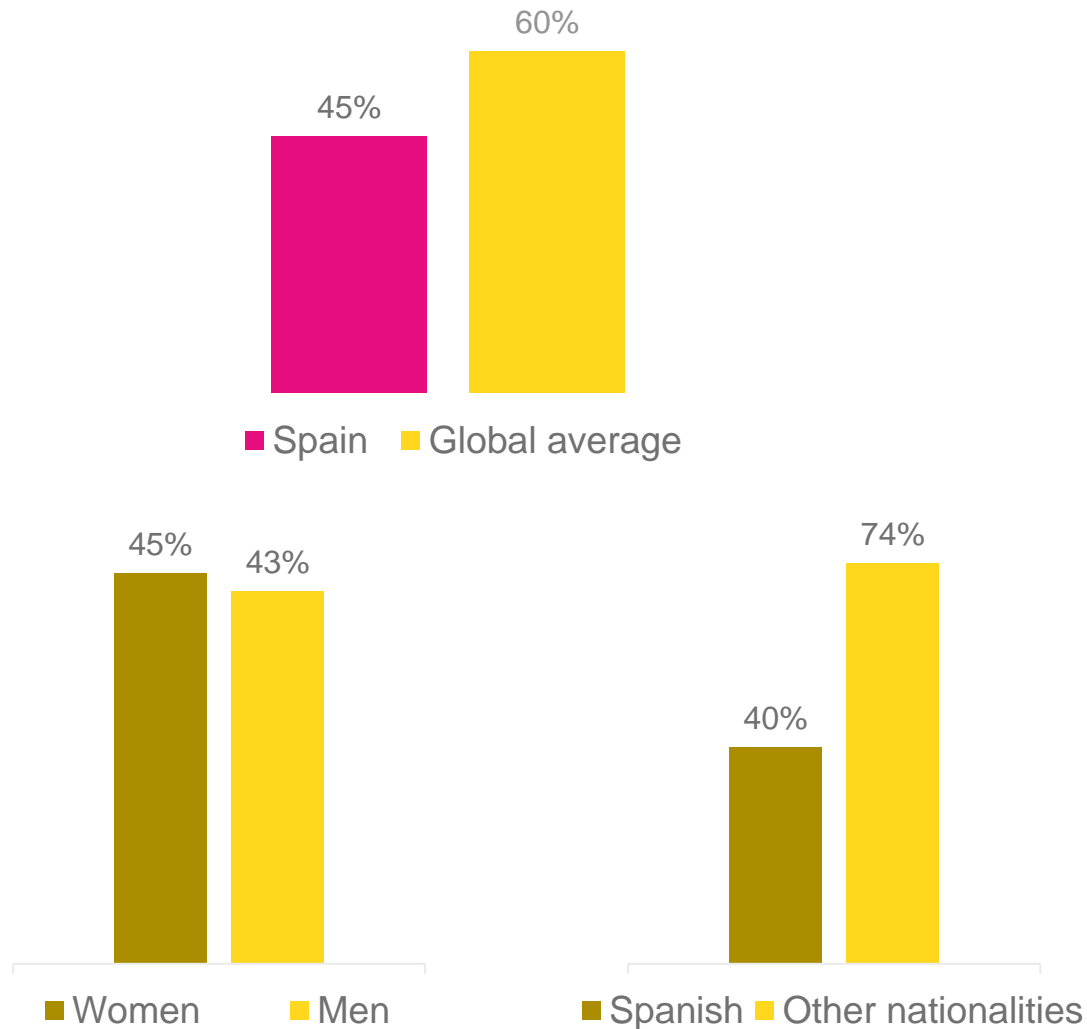
**2.**

## **Attitudes towards Diversity and Inclusion in the Workplace and the Industry**



## Spain

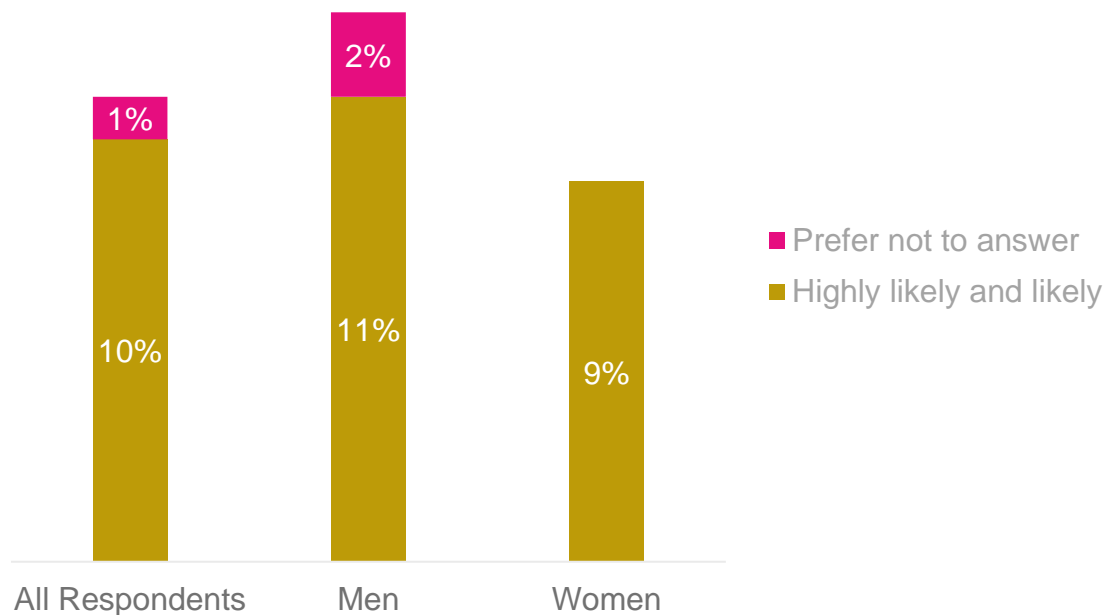
Respondents agreeing that their company is actively taking steps to be more diverse and inclusive



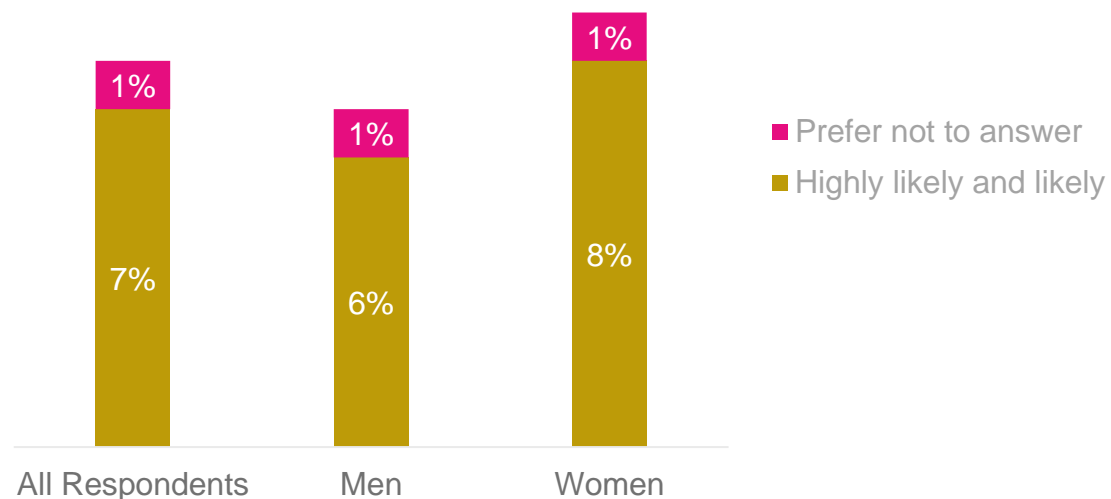
## Spain

## Potential Cost of Turnover

How likely are you to leave your current organisation based on lack of inclusion and/or discrimination you've experienced?



How likely are you to leave your current industry based on lack of inclusion and/or discrimination you've experienced?



*Prefer Not to Answer included in this instance as high risk of churn*



**3.**  
**Key take outs on:**  
**Gender, Nationality, Disability, Sexual Orientation, Religion, Age, Family**  
**Responsibilities**

# Key Metrics

## Experiences of discrimination

“At your company, have you personally experienced negative discrimination resulting from...”

## Escalation

“Do you believe that most colleagues would escalate inappropriate behaviour to senior management or HR?”

## Sense of Belonging

“I feel like I belong at my company”

## Career obstacles

“I have faced obstacles in my career progression in this company which I believe are due to who I am (e.g. my gender, race, ethnicity, LGBTQ status, social mobility, health, religion, etc)”



# Spain Headlines

## Experiences of discrimination

Those identifying as LGBTQ+ report the most experiences of discrimination, whereas disabled individuals experience little.

## Escalation

Religious minority groups are the most sceptical surrounding inappropriate behaviour escalation, whereas disabled respondents have more faith in escalation than their majority peers.

## Sense of belonging

Religious minority groups feel the most isolated, followed by women. However, LGBTQ+ and disabled respondents feel a higher sense of belonging than their majority counterparts.

## Career obstacles

All deep dive areas expressed a higher perception of career obstacles than their majority colleagues. Religious minority groups report the most perceived career obstacles.



# Gender in Spain

3%

Of women respondents have experienced discrimination at their company based on their gender. This is below the 7% global average. 8% of all respondents have witnessed discrimination towards others due to their gender.

51%

Of women respondents believe that most colleagues would escalate inappropriate behaviour to senior management or HR, compared to 56% of men.

75%

Of women respondents feel like they belong at their company, compared to 79% of men.

25%

Of women respondents believe they have faced obstacles in their career progression at their company due to who they are, compared to 21% of men.





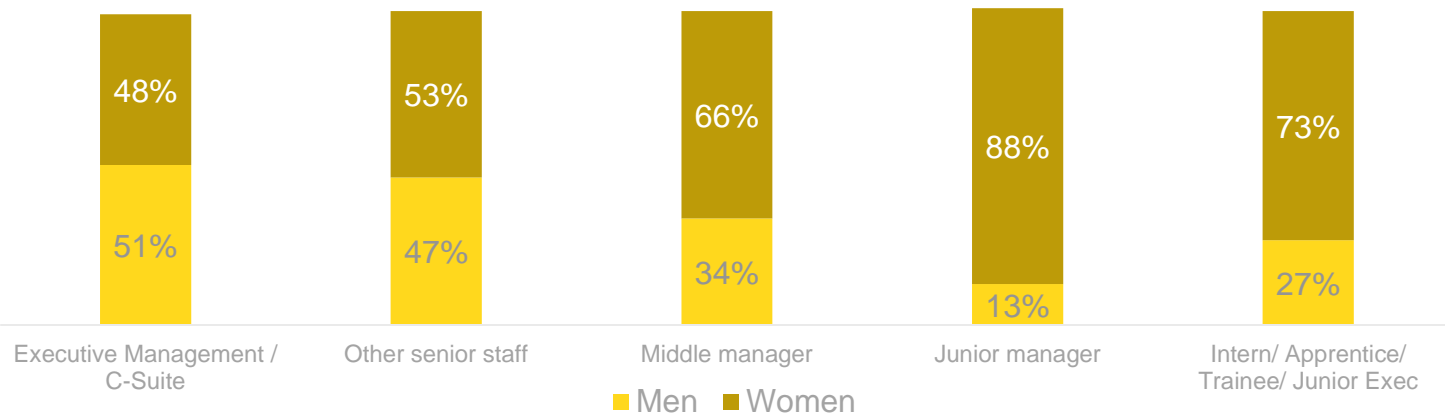
# Gender in Spain

## Average Pay by Gender

*Note these are indicative pay gaps only based on salary bands selected and not on actual salary data*

Level	Men average salary	Women average salary	% Gap
Exec management/c-suite	€ 119,342	€ 103,281	16%
Other senior staff	€ 85,652	€ 71,000	21%
Middle manager	€ 58,600	€ 49,800	18%
Junior manager	€ 25,000	€ 32,142	-22%
Intern/Apprentice/Trainee/Junior executive	€ 25,999	€ 25,937	0%

## Position by Gender





# Nationality in Spain

4%

Of national minority respondents have experienced discrimination at their company based on their nationality. 2% of all respondents have witnessed discrimination towards others due to their nationality.

55%

Of national minority respondents believe that most colleagues would escalate inappropriate behaviour to senior management or HR, compared to 52% of their Spanish colleagues.

91%

Of national minority respondents feel like they belong at their company, compared to 75% of their Spanish colleagues.

28%

Of national minority respondents believe they have faced obstacles in their career progression at their company due to who they are, compared to 23% of their Spanish colleagues



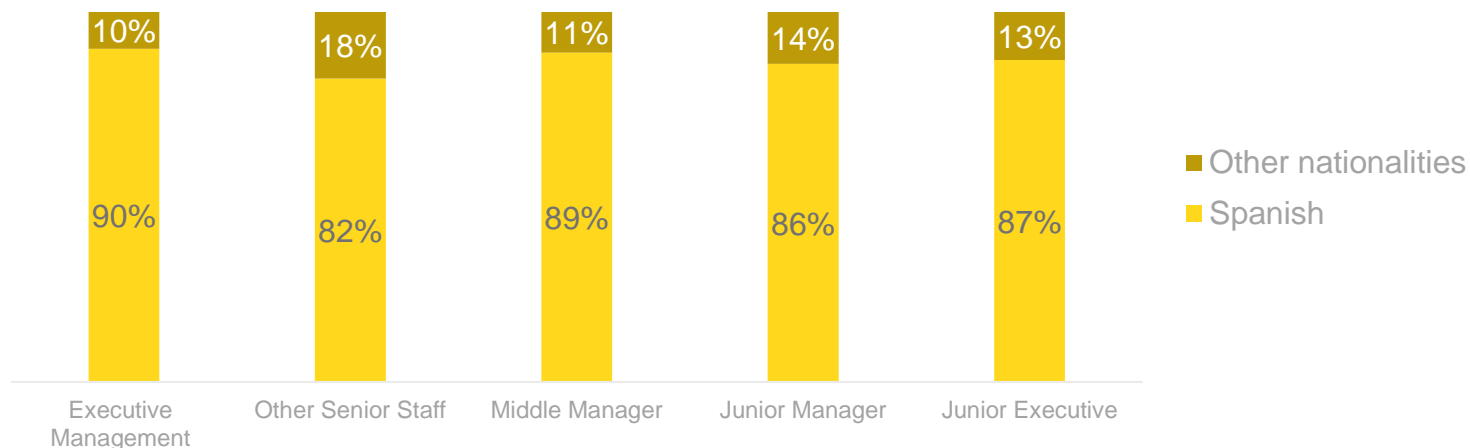
# Nationality in Spain

## Average Pay by Nationality

*Note these are indicative pay gaps only based on salary bands selected and not on actual salary data*

Level	Sapnish nationality average salary	Other nationalities average salary	% Gap
Exec management/c-suite	€ 113,492	€ 118,125	-4%
Other senior staff	€ 72,692	€ 101,111	-28%
Middle manager	€ 55,294	€ 46,250	20%
Junior manager	€ 26,666	€ 45,000	-41%
Intern/Apprentice/Trainee/Junior executive	€ 25,789	€ 26,666	-3%

## Position by Nationality



# Disability in Spain

0%\*

Of respondents with disabilities have experienced discrimination at their company based on their disabilities. 1% of all respondents have witnessed discrimination towards others due to their disability status.

60%\*

Of respondents with disabilities believe that most colleagues would escalate inappropriate behaviour to senior management or HR, compared to 53% of their counterparts without disabilities.

80%\*

Of respondents with disabilities feel like they belong at their company, compared to 77% of their counterparts without disabilities.

*\* Indicates data is based on 10 or fewer respondents*

40%\*

Of respondents with disabilities believe they have faced obstacles in their career progression at their company due to who they are, compared to 23% of their counterparts without disabilities.



# Sexual Orientation in Spain

5%

Of LGBTQ+ respondents have experienced discrimination at their company based on their sexual orientation. 4% of all respondents have witnessed discrimination towards others due to their sexual orientation.

59%

Of LGBTQ+ respondents believe that most colleagues would escalate inappropriate behaviour to senior management or HR compared to 54% of their heterosexual counterparts.

82%

Of LGBTQ+ respondents feel like they belong at their company, compared to 77% of their heterosexual counterparts.

29%

LGBTQ+ respondents believe they have faced obstacles in their career progression at their company due to who they are, compared to 23% of their heterosexual counterparts.





# Religion in Spain

1%

Of religious minority respondents have experienced discrimination at their company based on their religious background. 1% of all respondents have witnessed discrimination towards others due to their religion.

51%

Of religious minority respondents believe that most colleagues would escalate inappropriate behaviour to senior management or HR compared to 56% of their religious majority counterparts.

74%

Religious minority respondents feel like they belong at their company, compared to 80% of their religious majority counterparts.

28%

Religious minority respondents believe they have faced obstacles in their career progression at their company due to who they are, compared to 20% of their religious majority counterparts.





## Age in Spain

**28%**

Of respondents do not believe that their company treats all employees equally regardless of age.

**37%**

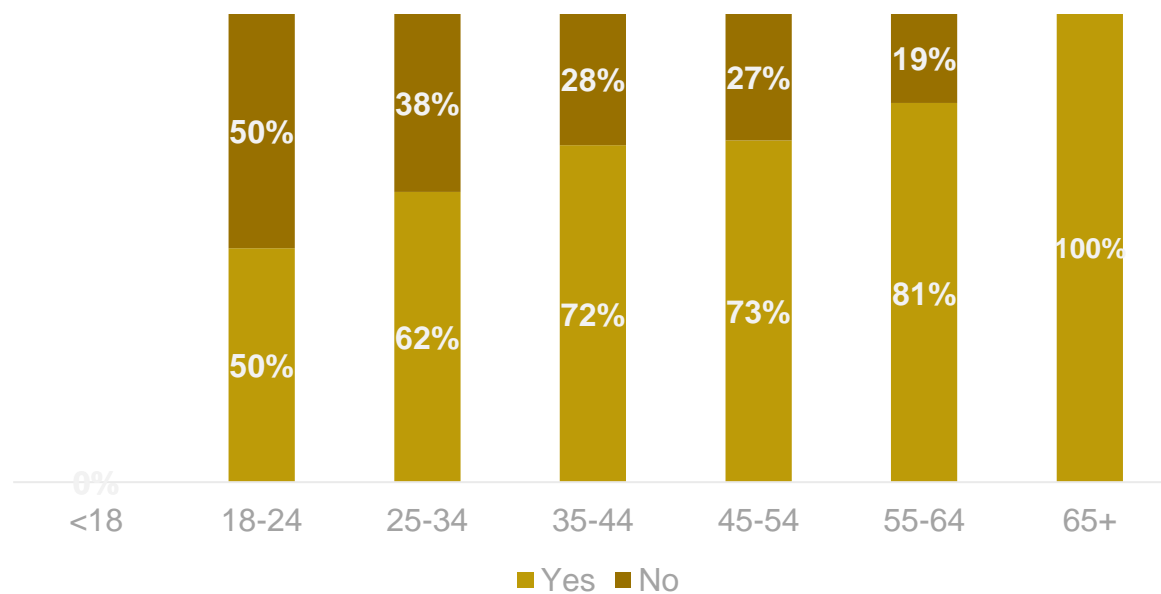
Of women respondents do not believe that their company treats all employees equally regardless of age, compared to 17% of men.

**44%**

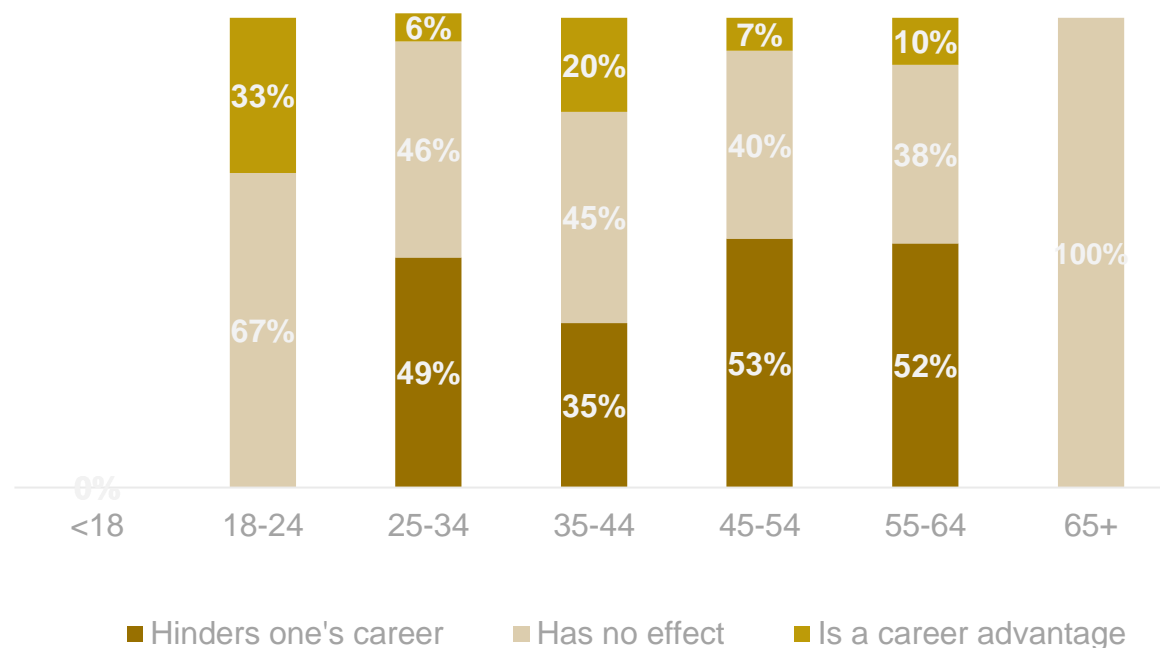
Of respondents believe that age can hinder one's career at their company.

## Perceptions of Ageism in Spain

Do you believe that your company treats everyone equally regardless of age?



On average, does age hinder or enhance one's career at your company?





## Family Status in Spain

**33%**

Of respondents do not believe that their company treats all employees equally regardless of family status.

**48%**

Of respondents believe that family status can hinder one's career at their company.

**39%**

Of women respondents do not believe that their company treats all employees equally regardless of family status, compared to 24% of men.

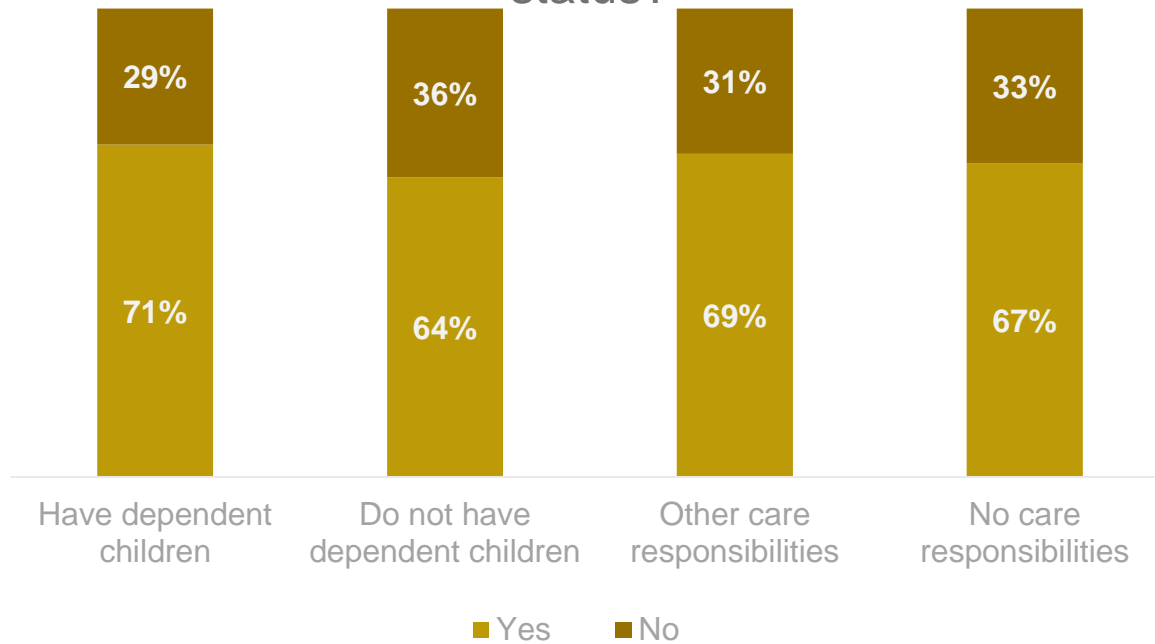
**59%**

Of women respondents believe that family status can hinder one's career at their company, compared to 32% of men.

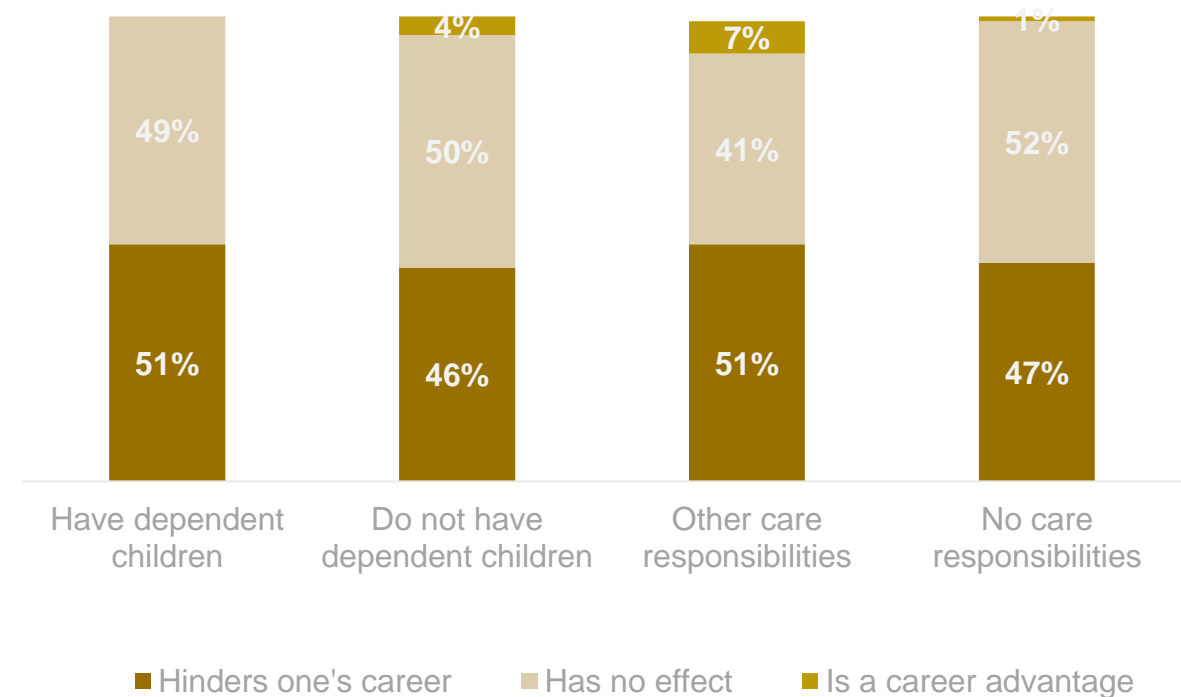


## Perceptions of Family Status in Spain

Do you believe that your company treats everyone equally regardless of family status?



On average, does family status hinder or enhance one's career at your company?



## 4. Next steps



## Follow up actions

18 October	18 October	Early December	Q1 2023	June 2023
Public release	WFA panel @ AWNY	WFA/VoxComm event	Wave II in field	Wave II results launched at Cannes Lions (TBD)
Press release with main global research findings; National Associations are invited to develop their own local releases based on their local reports	Results for USA and Canada presented at Advertising Week New York with panel ( <a href="#">details</a> )	Results presented and discussed with more detailed findings	WFA and partners to re-run the research; markets TBD	



### Your complimentary digital delegate pass for Advertising Week New York October 18

As a supporter of the initiative, you have complimentary access to all live and on-demand sessions at Advertising Week New York, including the WFA panel on October 18 at 11:30 am East Coast Time (details about the panel [here](#)).

To claim your digital pass click [here](#).

## 5. Appendix



## Index questions

### Company sense of belonging:

How strongly do you agree or disagree with these statements?

1. Strongly disagree
  2. Disagree
  3. Neither agree or disagree
  4. Agree
  5. Strongly agree
  99. Prefer not to answer
- I feel like I belong at my company.
  - I am a valued and essential part of my direct team.
  - I am a valued and essential part of my company.
  - I am emotionally and socially supported at work.
  - My unique attributes, characteristics, skills, experience and background are valued in my company.
  - Most employees in my company feel comfortable being themselves.
  - Senior managers are fair when it comes to hiring or career advancements of those that report into them.
  - I am provided with sufficient support to develop my skills and progress my career.

**Presence of negative behaviour:** Have you experienced any of the following within the last 12 months at your company?

Yes/No

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

**Absence of discrimination:** At your company, have you personally experienced negative discrimination in the following area? Yes/No

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

## Spain and global data

	ESP	Global
<b>Inclusion Index</b>	<b>69%</b>	<b>64%</b>
<b>Company Sense of Belonging Percent</b>	<b>70%</b>	<b>68%</b>
I feel like I belong at my company - % agree	77%	72%
I am a valued and essential part of my direct team - % agree	85%	82%
I am a valued and essential part of my company - % agree	70%	70%
I am emotionally and socially supported at work - % agree	69%	61%
My unique attributes, characteristics, skills, experience and background are valued in my company - % agree	74%	73%
Most employees in my company feel comfortable being themselves - % agree	78%	74%
Senior management do not discriminate when it comes to hiring or career advancements of those that report into them - % agree	53%	52%
I am provided with sufficient support to develop my skills and progress my career - % agree	59%	59%
<b>Absence of Discrimination Percent</b>	<b>97%</b>	<b>96%</b>
My Age - Personally Discriminated at Company - % no	94%	92%
My Gender - Personally Discriminated at Company - % no	98%	95%
My Family Status - Personally Discriminated at Company - % no	92%	94%
My Ethnicity - Personally Discriminated at Company - % no	99%	96%
Religion - Personally Discriminated at Company - % no	99%	98%
Disability Status - Personally Discriminated at Company - % no	100%	99%
Sexual Orientation - Personally Discriminated at Company - % no	100%	99%
Appearance - Personally Discriminated at Company - % no	97%	95%
Social Class - Personally Discriminated at Company - % no	100%	97%
<b>Presence of Negative Behavior Percent</b>	<b>15%</b>	<b>18%</b>
Unfairly spoken over and not listened to in meetings - % yes	8%	22%
Learning Opportunities or progress restricted by senior colleagues - % yes	20%	18%
Undervalued compared to colleagues of equal competence - % yes	23%	29%
People taking sole credit for shared efforts - % yes	39%	32%
Bullied, undermined or harassed in any way - % yes	6%	14%
Physical harassment or violence - % yes	2%	1%
Exclusion from events/activities - % yes	10%	10%
Made to feel uncomfortable in the workplace - % yes	16%	17%