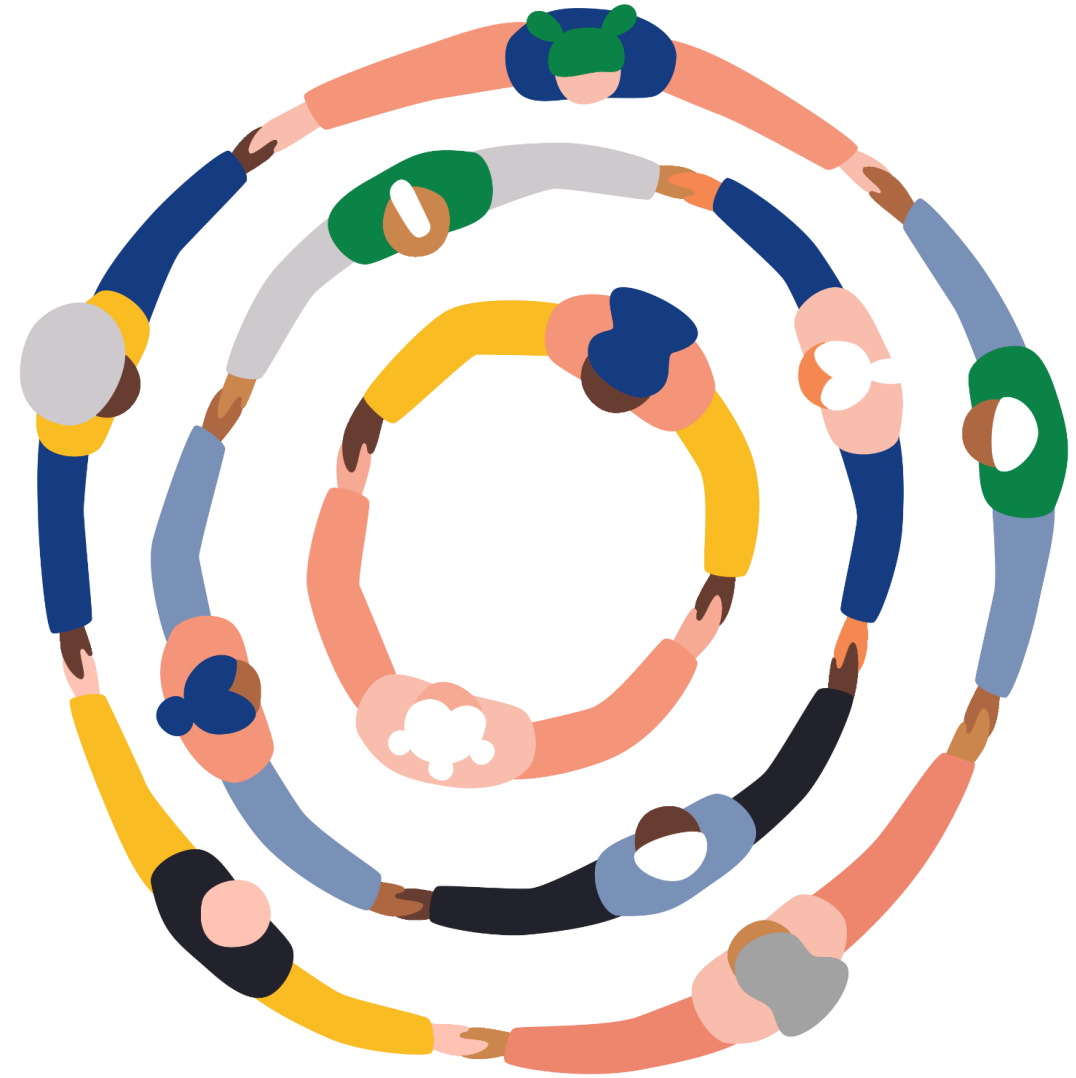


KANTAR

The Global DEI Census

Turkey Market Report



campaign

KANTAR

VOCMM



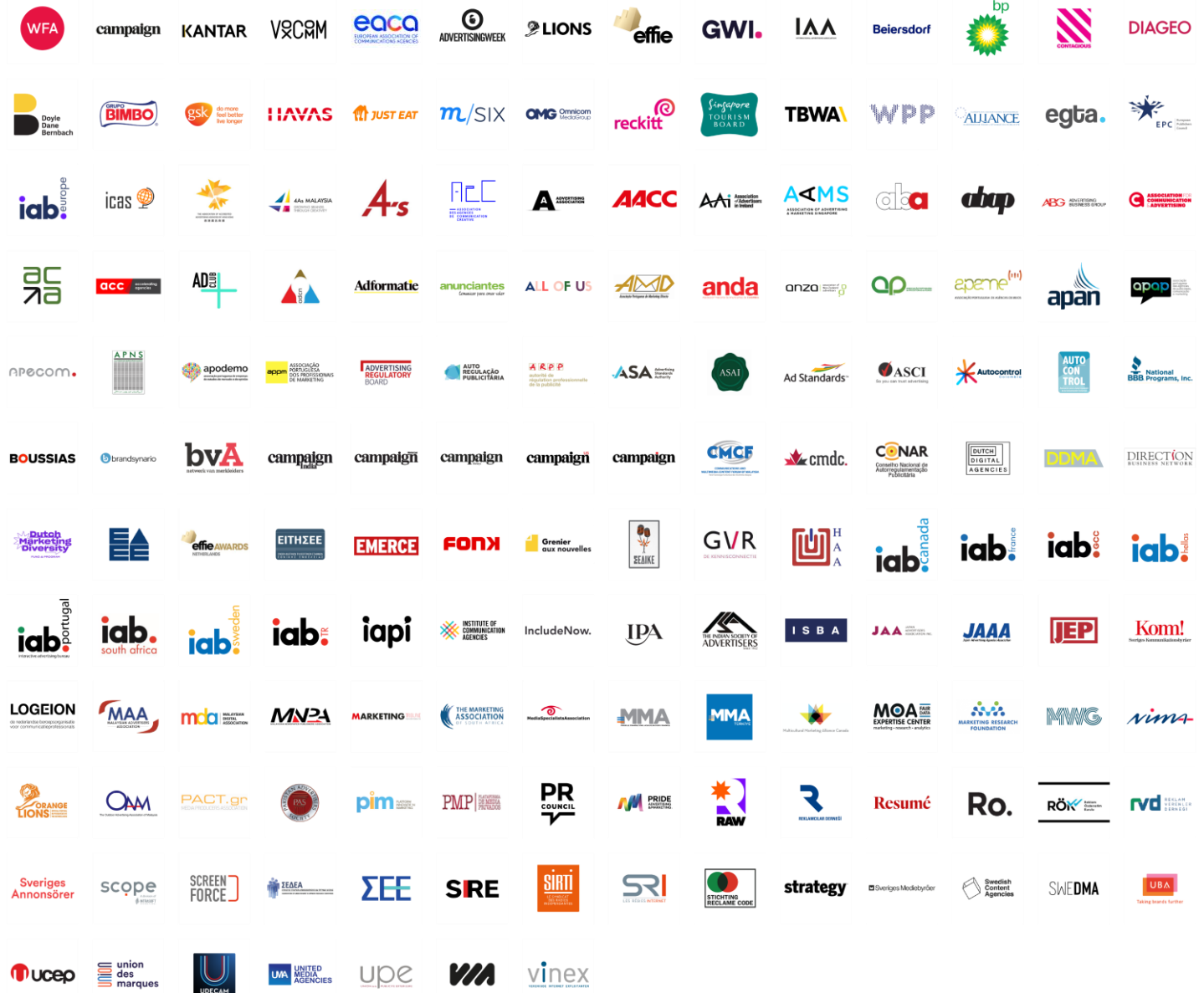
GWI.

IAA

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.



Acknowledgements

We also would like to express our gratitude to all Turkish partners who took part in this collective effort.



Methodology note – this is not a census, but a proof of concept

- No such thing as an optional census;
- But a critical proof of concept owing to legal and cultural sensitivities of asking for such sensitive data across 27 jurisdictions/countries;
- AND we need to start somewhere... 10,000 people's lived experiences is a great starting point;
- And while we know the findings are indicative, we are especially cautious about drawing too many learnings, especially from Colombia and Hong Kong where samples were relatively low;

Code of conduct

The multiple partner organisations behind this research have collected responses across their respective jurisdictions and made the data available in the spirit of making the global marketing industry a more diverse and inclusive place to work.

In return, we all need to recognize the sensitive nature of the data and to treat it appropriately. By accessing this data, you are agreeing to abide by the following Code of Conduct:

Do:

- Share this data within your organisation to support actions relating to making our industry more diverse and inclusive.
- Share topline aggregated data outside of the organisation, for instance with the press, in order to raise visibility for the issues and drive constructive conversations

Don't share sensitive data outside of your organisation - or make any comparison between your national data and other countries/markets

Headlines

Diversity Headlines

- Men are underrepresented in the advertising and marketing industry in comparison to national data. Disabled respondents, on the other hand, are well represented in comparison to national data.
- Men are more likely to think that their organisations are taking steps to be more inclusive.
- However, cost of turnover is high, with 34% of men likely to leave their organisations based on the lack of inclusion or diversity they are experiencing.
- Salaries by level are broadly equal with the biggest difference at other senior staff level where women are paid 19% more than men.

Inclusion Headlines

- Women feel as though they belong in their organisations more than their male counterparts. This is likely to be driven by the perception that they face fewer career obstacles than men. Despite this they report less faith that inappropriate behavior will be escalated.
- Disabled respondents experience the lowest sense of belonging (40%) in comparison to their majority peers (61%). This is likely influenced by their increased perception of career obstacles. However, discrimination is low and this may be due to heightened belief that inappropriate behavior will be escalated.
- There is a strong belief that age can lead to both inequality and career hinderance - men adopt this view more than women. Inequality due to age is seen most in younger colleagues, whereas career hinderance is perceived more frequently by older colleagues.
- There is a strong perception of inequality dependent on family status and this view is particularly adopted by women. However, career hinderance is reported more commonly by those with other care responsibilities than individuals with dependent children.

1.
Demographics and Index
Overview



Turkey

OVERALL RESPONSES = 307

Company type	%
Brand (e.g. P&G, Unilever, etc.)	39
Creative agency	22
Media agency	20
Media/Tech	3
Industry association/trade body	2
Production House	1
Publisher	2
Research/insights agency	1
I am a freelancer	1
Media – ad sales	4
Other	5

Gender

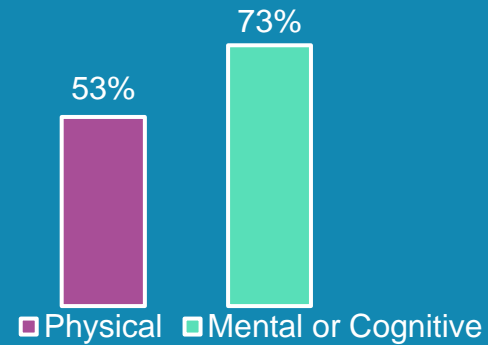
	Women	Men	Gender non-conforming
DEI survey	62%	38%	-
National Average*	50%	50%	2%

*taken from national census data

Disability Status

6% of respondents are Disabled

Compared to 3% National Average



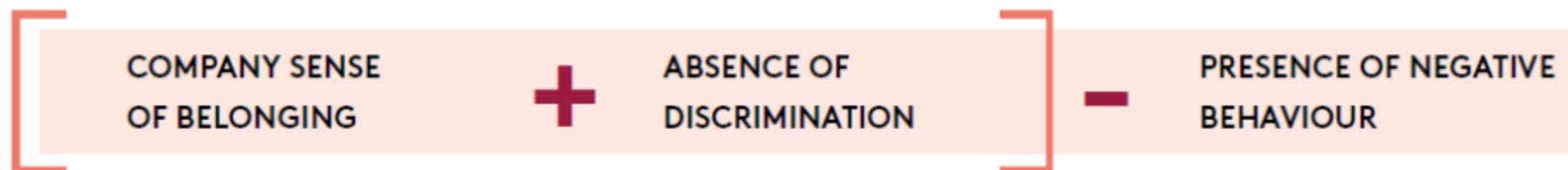
About the Inclusion Index

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 Behaviour

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:



*Note this will vary by market depending on questions asked

Inclusion Index

	Overall Inclusion Index
Turkey	60%
Global average	64%

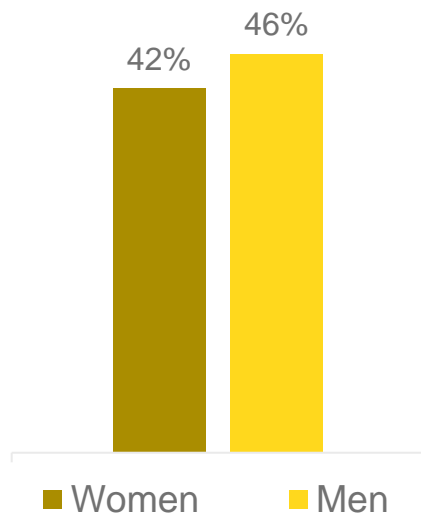
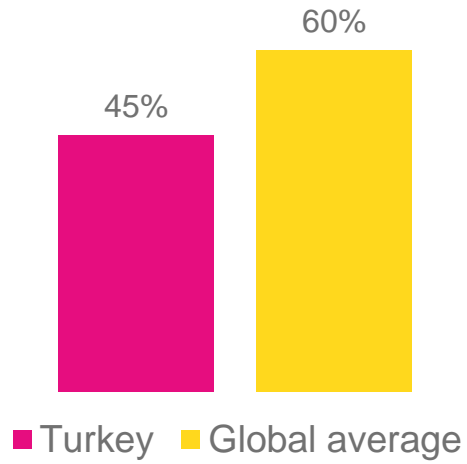
	Sense of Belonging	Absence of Discrimination	Presence of Demeaning Behaviour
Turkey	61%	97%	19%
Global average	68%	96%	18%

2.
**Attitudes towards Diversity
and Inclusion in the
Workplace and the Industry**



Turkey

Respondent agreement that their company is actively taking steps to be more diverse and inclusive

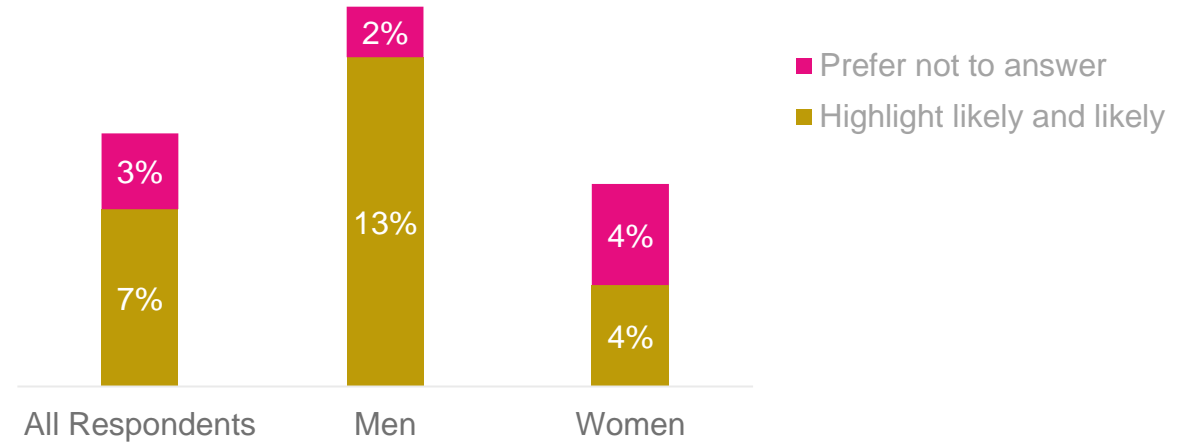
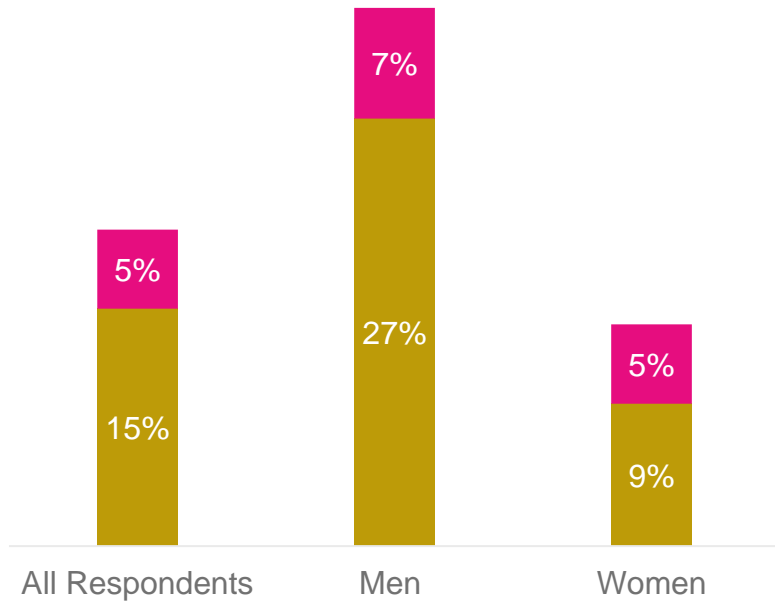


Turkey

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, Disability, 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)”



Turkey Headlines

Experiences of discrimination

Women report the most discrimination (4%) whilst disabled individuals recorded no discrimination.

Escalation

Women had less faith than men in the escalation of inappropriate behaviours to HR.

Sense of belonging

Women felt they belong in their current organisation more than their male counterparts (+4%). While disabled respondents felt significantly more isolated than their peers (40% belonging vs 61%).

Career obstacles

Women perceive fewer obstacles to career progression than men (7% vs 15%), however disabled individuals reported far more than their majority peers (23% vs 8%).



Gender in Turkey

4%

Of women respondents have experienced discrimination at their company based on their gender vs 7% global average. 4% of all respondents have witnessed discrimination towards others due to their gender.

49%

Of women respondents believe that most colleagues would escalate inappropriate behaviour to senior management or HR, compared to 51% of men.

62%

Of women respondents feel like they belong at their company, compared to 58% of men.

7%

Of women respondents believe they have faced obstacles in their career progression at their company due to who they are, compared to 11% of men.



Disability in Turkey

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.

50%

Of respondents with disabilities believe that most colleagues would escalate inappropriate behaviour to senior management or HR, compared to 49% of their counterparts without disabilities.

40%

Of respondents with disabilities feel like they belong at their company, compared to 61% of their counterparts without disabilities.

23%

Of respondents with disabilities believe they have faced obstacles in their career progression at their company due to who they are, compared to 8% of their counterparts without disabilities.





Age in Turkey

33%

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

31%

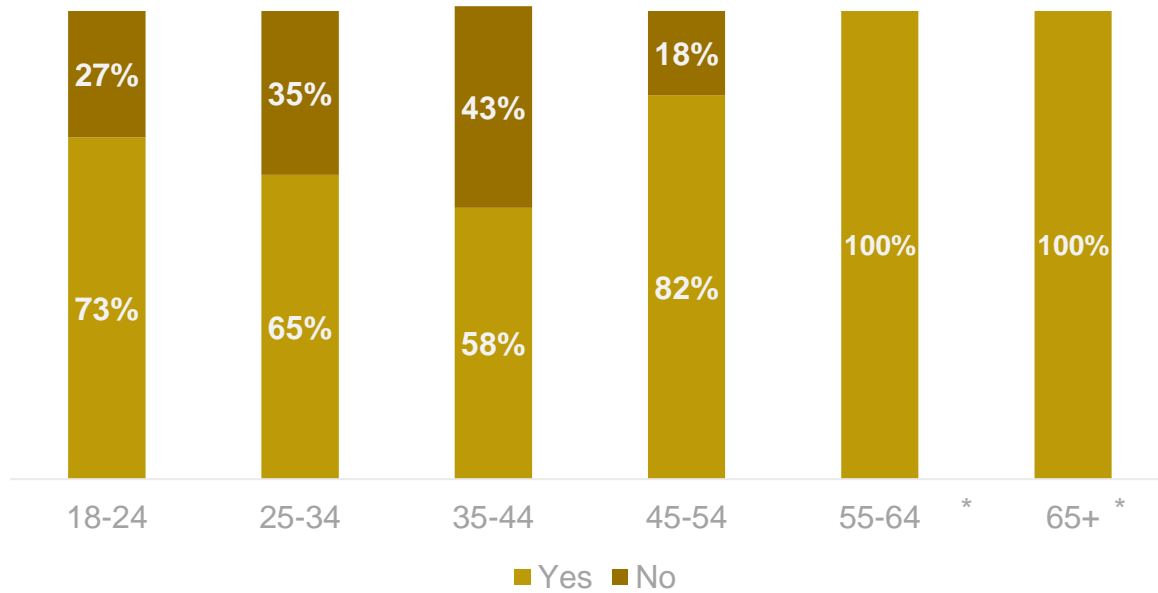
Of women respondents do not believe that their company treats all employees equally regardless of age, compared to 37% of men.

36%

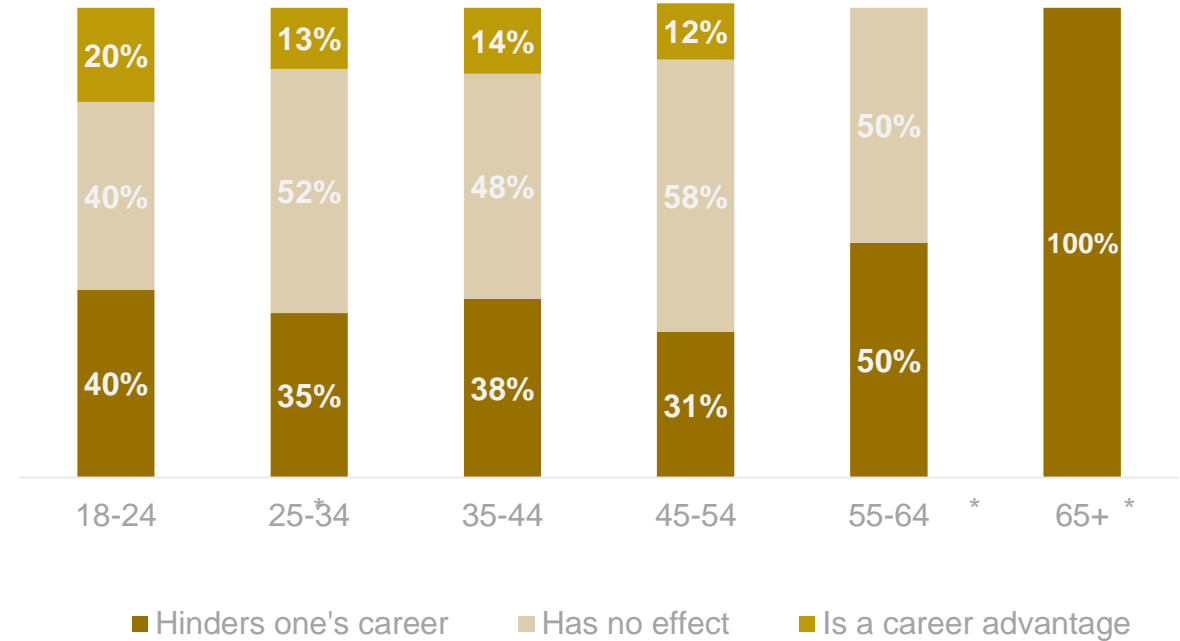
Of respondents believe that age can hinder one's career at their company.

Perceptions of Ageism in Turkey

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?



* Indicates statistic is based on 10 or fewer respondents



Family Status in Turkey

34%

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

29%

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

37%

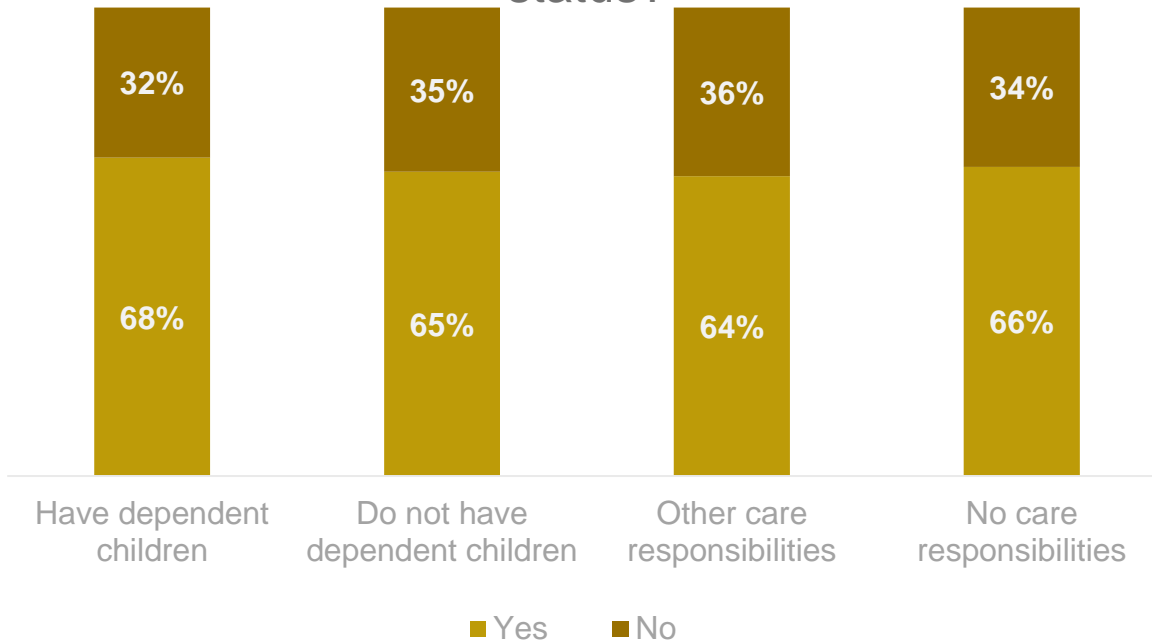
Of women respondents do not believe that their company treats all employees equally regardless of family status, compared to 29% of men.

37%

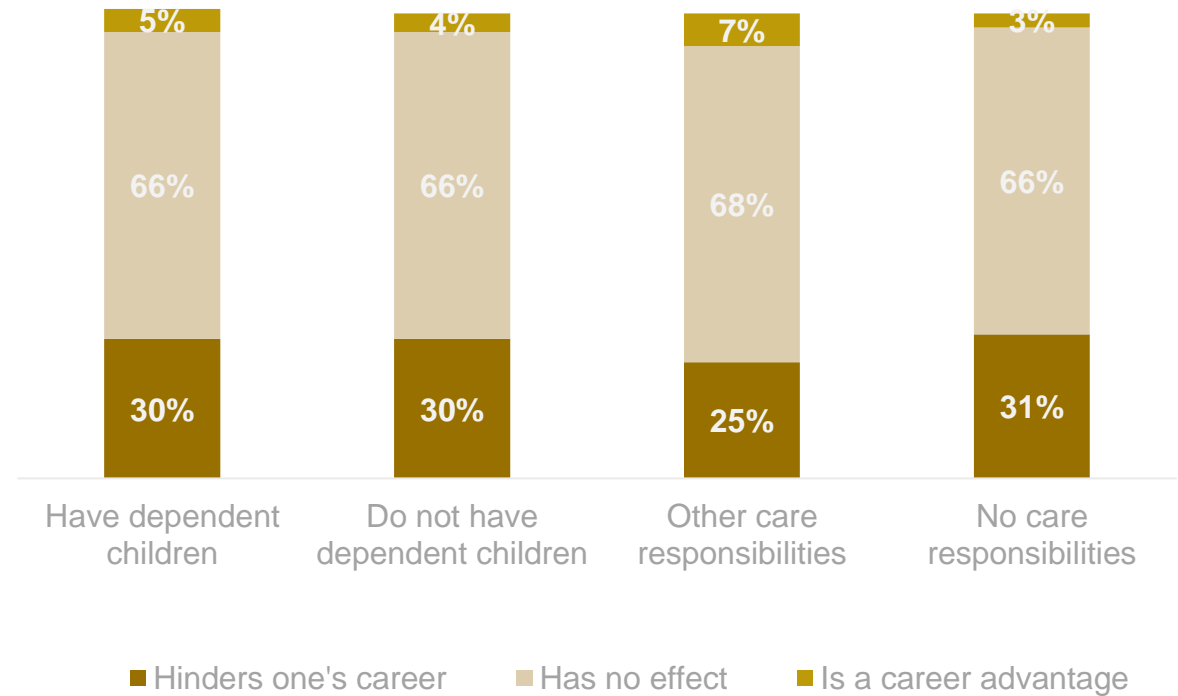
Of women respondents believe that family status can hinder one's career at their company, compared to 15% of men.

Perceptions of Family Status in Turkey

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. 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

Turkey and global data

	TUR	Global
Inclusion Index	60%	64%
Company Sense of Belonging Percent	61%	68%
I feel like I belong at my company - % agree	60%	72%
I am a valued and essential part of my direct team - % agree	80%	82%
I am a valued and essential part of my company - % agree	66%	70%
I am emotionally and socially supported at work - % agree	47%	61%
My unique attributes, characteristics, skills, experience and background are valued in my company - % agree	65%	73%
Most employees in my company feel comfortable being themselves - % agree	71%	74%
Senior management do not discriminate when it comes to hiring or career advancements of those that report into them - % agree	50%	52%
I am provided with sufficient support to develop my skills and progress my career - % agree	48%	59%
Absence of Discrimination Percent	97%	96%
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	95%	94%
My Ethnicity - Personally Discriminated at Company - % no	98%	96%
Religion - Personally Discriminated at Company - % no	99%	98%
Disability Status - Personally Discriminated at Company - % no	99%	99%
Sexual Orientation - Personally Discriminated at Company - % no	99%	99%
Appearance - Personally Discriminated at Company - % no	93%	95%
Social Class - Personally Discriminated at Company - % no	96%	97%
Presence of Negative Behavior Percent	19%	18%
Unfairly spoken over and not listened to in meetings - % yes	14%	22%
Learning Opportunities or progress restricted by senior colleagues - % yes	13%	18%
Undervalued compared to colleagues of equal competence - % yes	33%	29%
People taking sole credit for shared efforts - % yes	34%	32%
Bullied, undermined or harassed in any way - % yes	11%	14%
Physical harassment or violence - % yes	0%	1%
Exclusion from events/activities - % yes	9%	10%
Made to feel uncomfortable in the workplace - % yes	35%	17%