

The Global DEI Census 2023

ITALY MARKET REPORT
SEPTEMBER 2023



ACKNOWLEDGEMENTS

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

The output is in-depth insight into the lived experiences of nearly **13,000 people** across our industry, insights that will enable us to drive change.

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



METHODOLOGY

1 INCLUSION INDEX

2 DISCRIMINATION IN THE WORKPLACE

- Age
- Gender
- Family status
- Mental Health

HEADLINES



METHODOLOGY



2023 survey

Online survey commissioned to Kantar and conducted in March-April 2023



~13k

Nearly 13,000 respondents giving us detailed insight into people's lived experiences from across our industry globally



91

Across 91 countries

A broader reach of markets in 2023, making this a truly global census



33

In-depth analysis into 33 very different markets

Argentina, Brazil, Canada, **Finland, Germany, Greece**, Hong Kong, SAR, **Italy, Ireland**, India, Japan, Malaysia, New Zealand, **Netherlands, Norway**, Pakistan, Philippines, **Poland, Portugal**, Singapore, **Slovenia**, South Africa, **Spain, Sweden, Switzerland, Turkey**, the Gulf Cooperation Council (Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, UAE), and the USA



Covering representation and people's experiences at their companies



Gender



Age



Race & ethnicity



Sexuality



Disability



Sense of belonging
Experience of negative behaviours
Discrimination



Mental health

1. THE DEI GLOBAL INCLUSION INDEX



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:



*Note this will vary by market depending on questions asked

INDUSTRY RANKING 2022 (%)

Personal services (e.g. hairdressing, beauty)	64
Charity/Not-for-profit	61
Professional services (e.g. legal, accountancy)	61
Retail, Wholesale, Ecommerce	60
Education	58
Manufacturing	57
Transportation/Logistics	57
Travel and Tourism	56
Public sector (inc. government)	56
Environmental services	56
Construction and Property	55
Financial services (e.g. banking, insurance)	55
Health, Pharmaceuticals, Care	55
Utilities	55

Marketing/PR / Advertisement/ Market research	54
Fashion/Apparel/Textile	53
Hospitality and Food (e.g. restaurants)	52
IT/Technology/ Telecommunications	52
Media (inc. broadcasting)	51
Sport/Fitness	50
Security and Defence	49
Printing and Publishing	47
Other	47
Entertainment	43
Agriculture and Fishing	39

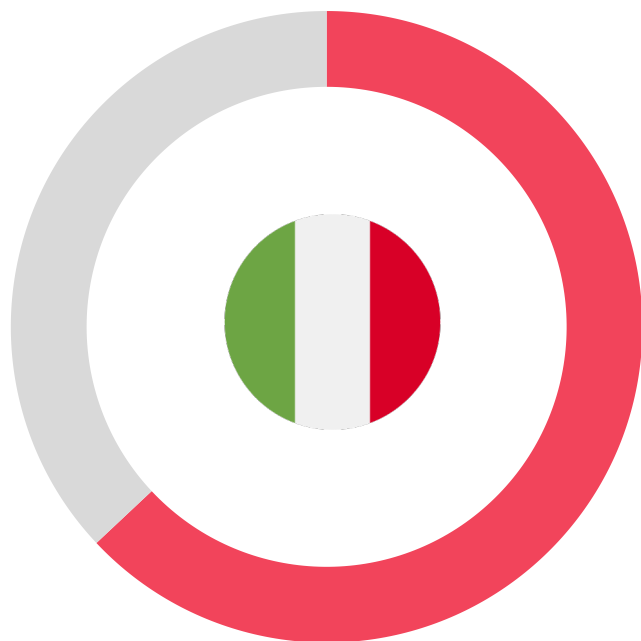
● Above the global average

● Meets the global average

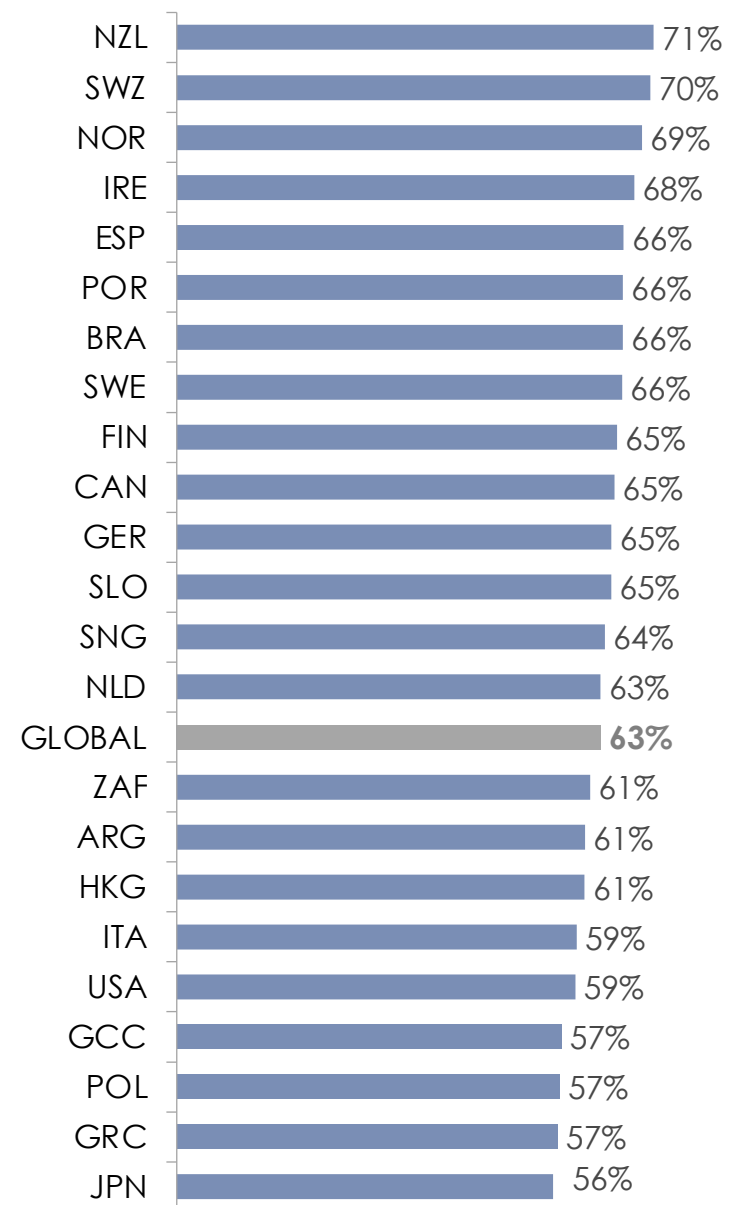
● Below the global average

- By using **benchmark data**, we can provide an unbiased perspective on what good looks like and enable development of an **actionable roadmap**
- In 2022 alone, we have used the data collected to build a **vast normative data set that covers over 24 industries. Over 12,000 respondents across 13 countries.**
- These norms will **evolve alongside society** and as more survey responses are added to the data set
- Kantar has proprietary data collected in **13 markets** while having done inclusion work in many more market

ITALY SCORES BELOW THE GLOBAL INCLUSION INDEX BENCHMARK



59%



IT IS RECOGNISED THAT PROGRESS HAS BEEN MADE, BOTH AT INDUSTRY AND COMPANY LEVEL, BUT THERE'S ALSO WIDESPREAD CONVICTION THAT THERE'S STILL LOTS TO DO

In terms of the **industry** becoming more diverse and inclusive in the last 2 years



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

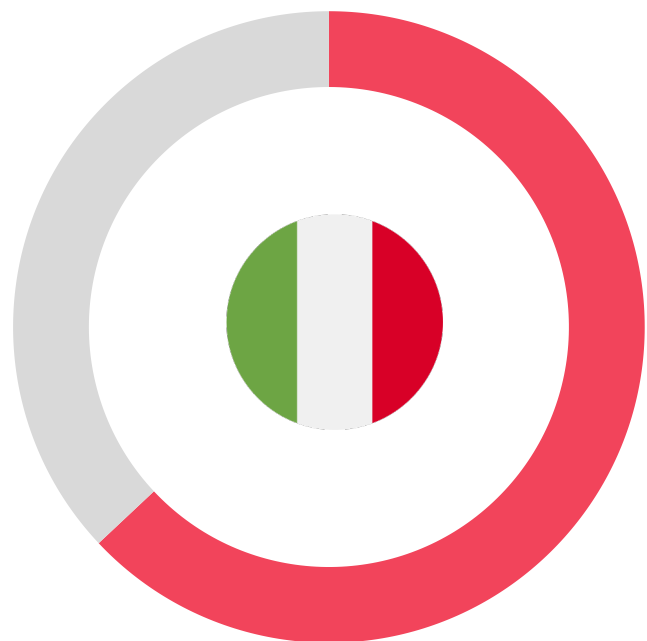


But there's the widespread opinion their **company should do more**



■ Global average
■ Italy 2023 survey

DEI CENSUS INCLUSION INDEX SCORE 2023



▼ 64% SENSE OF BELONGING

69%
Global benchmark

98% ABSENCE OF DISCRIMINATION


96%
Global benchmark

▼ 21% PRESENCE OF NEGATIVE BEHAVIOUR


19%
Global benchmark

SENSE OF BELONGING AT YOUR COMPANY

ITALIANS REPORT TO BE LESS SUPPORTED AND MORE DISCRIMINATED

		Italy vs Global
Company Sense of Belonging Percent	64%	-5%
I am a valued and essential part of my company - % agree	60%	-11%
I am provided with sufficient support to develop my skills and progress my career - % agree	48%	-9%
Senior management do not discriminate when it comes to hiring or career advancements of those that report into them - % agree	48%	-7%

PRESENCE OF NEGATIVE BEHAVIOUR – MORE ALIGNED WITH GLOBAL BENCHMARKING. IT ASSUMES THE FORM OF DEMEANING AND EXCLUSION

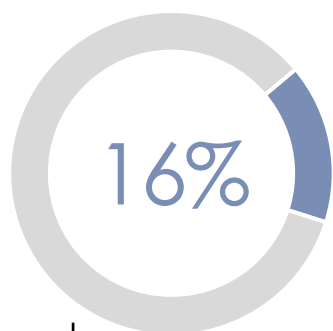
		Italy vs Global
Presence of Negative Behavior	21%	+2%
Unfairly spoken over and not listened to in meetings - % yes	35%	+9%
Undervalued compared to colleagues of equal competence - % yes	34%	+5%
Exclusion from events/activities - % yes	19%	+5%

2. DISCRIMINATION IN THE WORKPLACE



THE MOST COMMON FORMS OF DISCRIMINATION REPORTED ARE STILL AROUND GENDER, AGE AND FAMILY STATUS

Gender

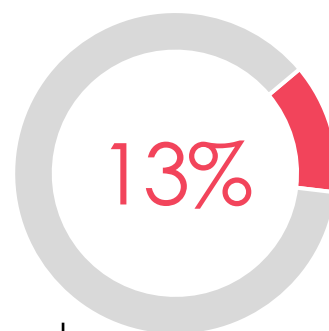


Experience personally or observed discrimination due to gender
WOMEN 21% | MEN 8%

44% of women

believe that **gender can hinder one's career** at their company vs 13% of men

Age

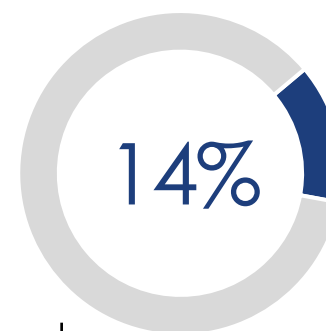


Experience personally or observed discrimination due to their age
WOMEN 15% | MEN 10%

50% of 45-54 yo

believe that **age can hinder one's career** at their company vs 39% of total respondents

Family responsibilities*



Experience personally or observed discrimination due to their family responsibilities
WOMEN 18% | MEN 9%

54% of parents

believe that family responsibilities can hinder one's career at their company vs 43% of total respondents

Disability is not reported due to the limited number of respondents; Race & Ethnicity is not observed in Italy

Family responsibilities includes if respondents have children responsibilities or other caregiver responsibilities,

i.e. they look after or give help or support to anyone because they have a long-term physical or mental health condition or illness, or problems related to old age, etc.

GENDER IN ITALY: KEY TAKE OUTS

1

Sense of belonging at their company is lower among women than men. The gender gap in Italy is higher than the global one

2

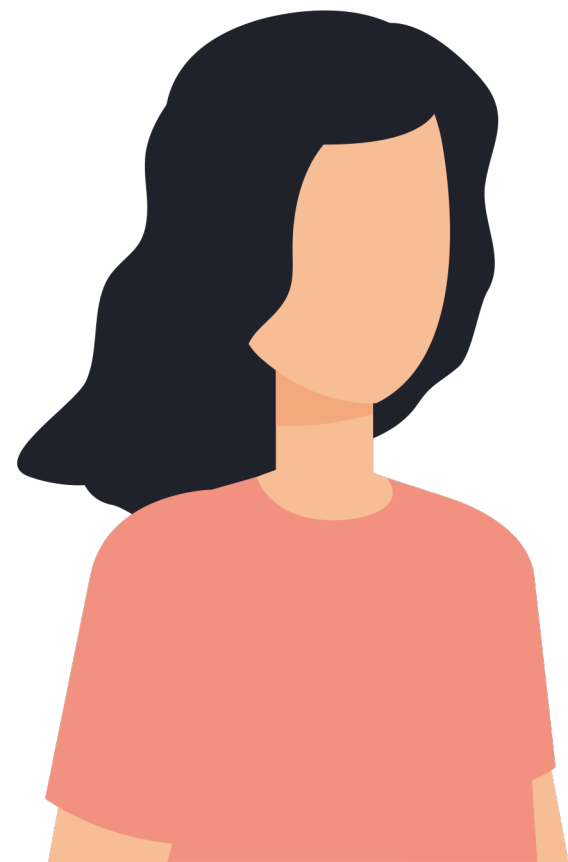
Women report that discrimination exists:

- gender hinders women careers
- trust in the escalation process to senior manager is limited
- claimed pay gap persists

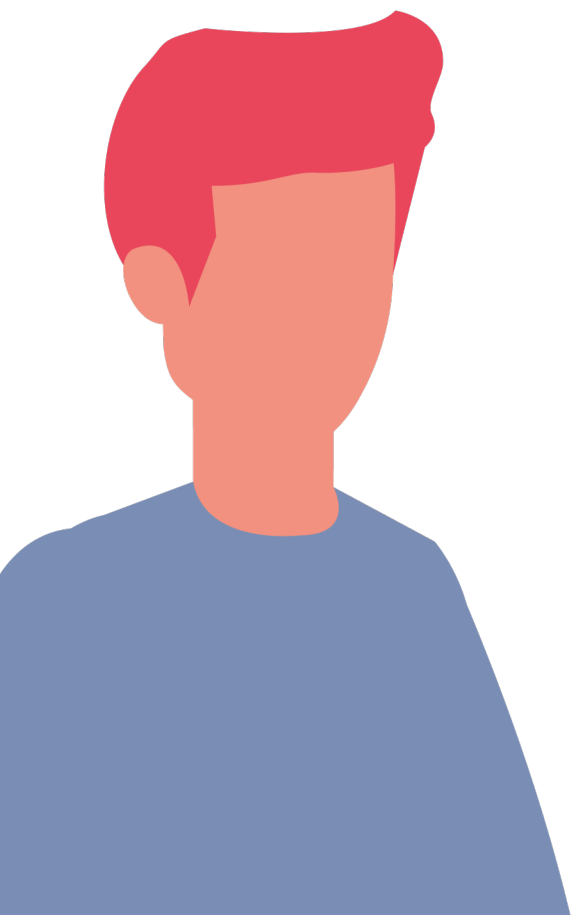
3

Women report being harassed:

- discomfort is most often reported
- escalation is rarely acted upon
- women fear the escalation process might generate retaliation



GENDER IN ITALY - SENSE OF BELONGING THERE'S A GAP BETWEEN MEN AND WOMEN






64% of **ITALIAN** respondents sense they **belong at their company**, compared to 69% of Global benchmark.



61% of **ITALIAN women** sense they **belong at their company**, compared to 67% of men.

SENSE OF BELONGING AT YOUR COMPANY

WOMEN REPORT TO BE LESS VALUED AND MORE DISCRIMINATED

		Italy vs Global	 women vs men	 women vs men
Company Sense of Belonging Percent	64%	-5%	-6%	-5%
My unique attributes, characteristics, skills, experience and background are valued in my company - % agree	69%	-1%	-17%	-7%
I am a valued and essential part of my company - % agree	60%	-11%	-9%	-6%
I am provided with sufficient support to develop my skills and progress my career - % agree	48%	-9%	-8%	-4%
Senior management do not discriminate when it comes to hiring or career advancements of those that report into them - % agree	48%	-7%	-16%	-9%



VOCOM

campaign

KANTAR



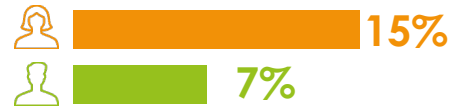
GWI.

ADWEEK₂₁

WOMEN REPORT GENDER DISCRIMINATION: IT IS EXPERIENCED, IT CAN HINDER THE CAREER, IT IS CONFIRMED BY SALARY GAP. AND WOMEN'S TRUST IN THE EFFECTIVENESS OF THE ESCALATION PROCESS IS LIMITED.



8% of women have experienced discrimination personally at their company based on their gender vs 1% of men.



15% of women have observed discrimination based on gender towards other at their company vs 7% of men.



42% of women believe that most colleagues would escalate inappropriate behaviour to senior management or HR, compared to 54% of men.



44% of believe that gender can hinder one's career at their company vs 13% of men

AVERAGE PAY BY GENDER

Level	% Gap average salary
Exec management/c-suite	-7%
Other senior staff	-5%
Manager	0%
Junior	-2%

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

My company provides equal pay for equal work (% agree)





VOCOM

campaign

KANTAR

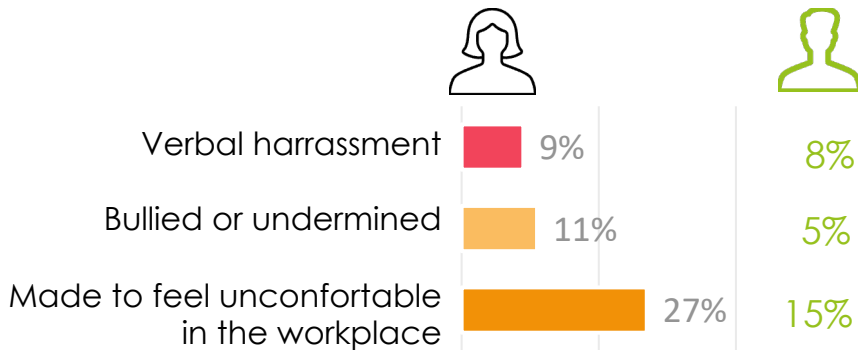


GWI.

ADWEEK

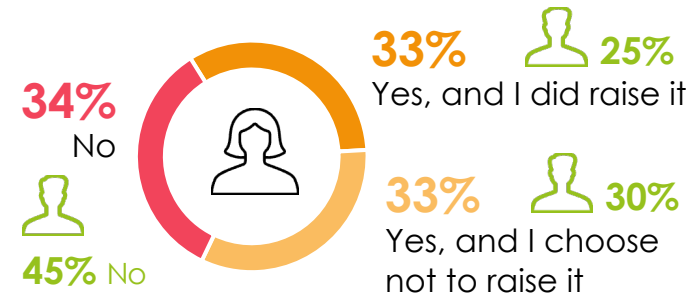
HARASSMENT IS MAINLY REPORTED IN TERMS OF SENSE OF DISTRESS. ESCALATION PROCESS IS SELDOM ACTED UPON, BOTH WHEN THE NEGATIVE BEHAVIOUR IS EXPERIENCED AND OBSERVED

Have you experienced in the last 12 months any of the following?

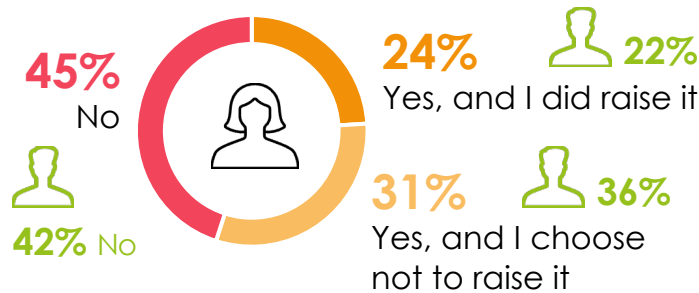
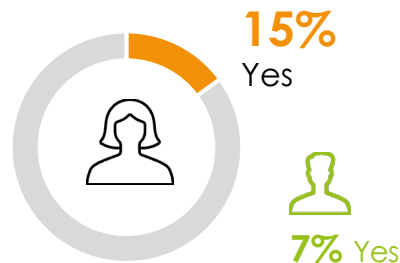


Did you feel comfortable in raising it to senior leaders or HR?

Base: those who experienced / Have observed (*)



Have you observed negative behaviour or discrimination towards others based on gender?






WHY NOT?

- I do not trust the process of escalation
- It could have a negative impact on my career
- The person responsible was my manager / a senior leader
- I do not think it was my place to do it

* caution: low base

PRESENCE OF NEGATIVE BEHAVIOUR - WOMEN REPORT TO BE LESS SUPPORTED AND MORE DISCRIMINATED THAN MEN

		Italy vs Global	 women vs men	 women vs men
Presence of Negative Behavior	21%	+2%	+7%	+4%
Undervalued compared to colleagues of equal competence - % yes	34%	+5%	+19%	+8%
Made to feel uncomfortable in the workplace - % yes	23%	+1%	+12%	+6%
Exclusion from events/activities - % yes	19%	+5%	+8%	+2%

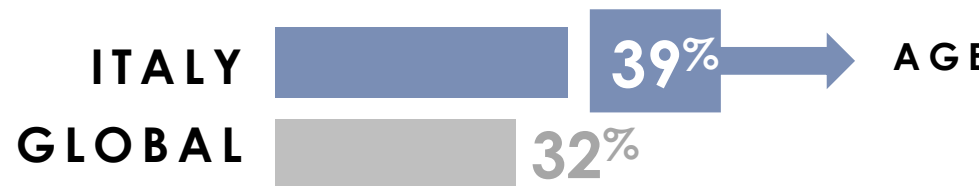
PERCEPTIONS OF AGEISM IN ITALY IS ALIGNED WITH THE GLOBAL BENCHMARK, THOUGH ITS IMPACT ON CAREER IS HIGHER



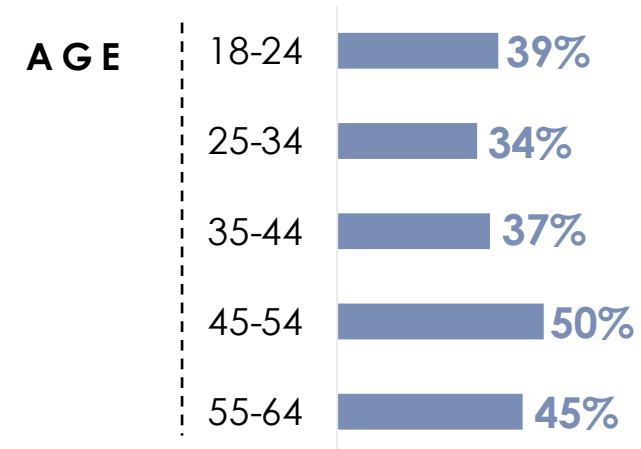
Of respondents have personally experienced discrimination due to their age.



8% of Italian women have personally experienced discrimination due to their age, compared to 2% of men.



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



FAMILY RESPONSIBILITIES IMPACT CAREERS (IN ITALY MORE THAN ABROAD)



51%
Women

51% of Italian women believe that family responsibilities can hinder one's career at their company.

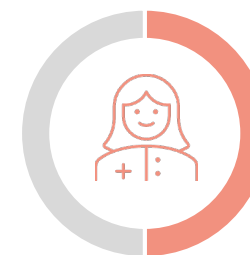
They are **41% at global level.**



54%
Parents

Of Italian parents with dependent children believe that family responsibilities can hinder one's career.

They are **42% at global level.**



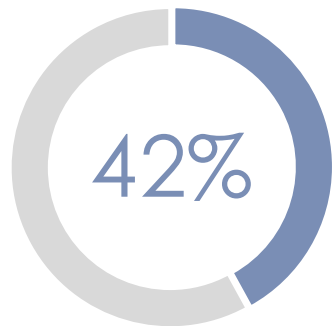
50%
Caregivers

Of Italian caregivers believe that family responsibilities can hinder one's career at their company.

They are **39% at global level.**

MENTAL HEALTH IS A FORM OF DISTRESS WHICH IS NOT MANAGED BY COMPANIES. IT IMPACTS PHYSICAL HEALTH

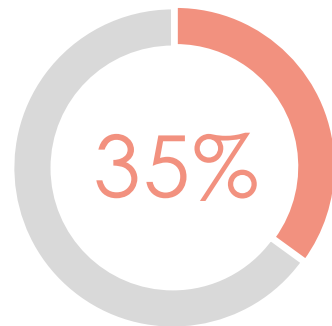
I am often **very stressed** at work - %agree



 52% IT

 26% NLD

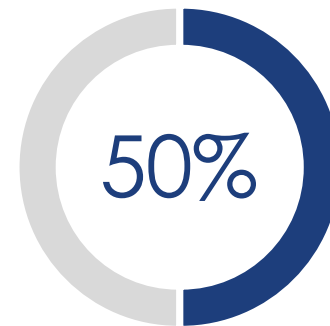
My company has an **active policy** to minimise the risk of mental health issues.- % agree



 22% IT

 52% SGP

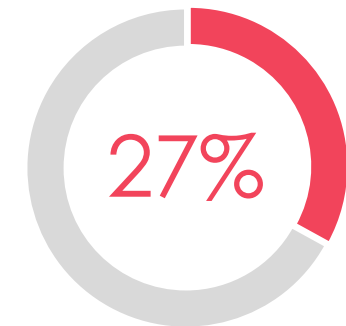
My **workplace is open** about **mental health** – %agree



 31% IT

 67% PHL

My **work** is having a **negative impact** on my physical health – % agree



 31% IT

 18% BRA



HEADLINES

HEADLINES

In an industry that is not very inclusive, Italy emerges as an even less inclusive country.

The drivers of this phenomenon are the modest sense of belonging and the presence of discriminatory behaviors – the situation more critical for women.

The areas in which discrimination manifests itself with greater intensity are gender, age and family status.

There is a non-trivial alert on mental health that is particularly relevant and unmanaged by companies.

DEI INCLUSION INDEX HEADLINES

Italy scores below the global Inclusion Index benchmark (59% vs 63%).

There is wide recognition from respondents that progress is being made, with 72% agreeing that their company is actively taking steps to be more diverse and inclusive.

43% of respondents agree things have improved in terms of the industry becoming more diverse and inclusive in the last 2 years, But the conviction there's still lots to do is widespread.



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.
- 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