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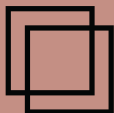
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THE GRBN GLOBAL DIVERSITY, EQUALITY & INCLUSIVITY (DEI) SURVEY 2021

FULL GLOBAL REPORT

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**A report on attitudes related to diversity, equality
and inclusivity in the workplace around the globe**

January 2022

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ABOUT THIS REPORT

This report contains the key findings from the research.

The report is broken down into a number of sections. You can navigate to each section by clicking on the thumbnail images in the Table of Contents on the next page.

The Key Findings section contains a written summary, followed by charts covering the following topics:

- **CONSIDERATION OF LEAVING CURRENT ORGANIZATION OR ROLE DUE TO DISCRIMINATION OR TO DIVERSITY, EQUALITY OR INCLUSIVITY (DEI) CONCERNS**
- **WORKPLACE CULTURE**
 - **EQUAL OPPORTUNITIES**
 - **ATTITUDES TOWARDS DIVERSITY, INCLUSIVITY AND EQUALITY IN THE WORKPLACE**
- **PERSONAL EXPERIENCE OF DIRECT DISCRIMINATION IN THE WORKPLACE**
 - **BY TYPE OF DISCRIMINATION**
 - **BY REASON FOR DISCRIMINATION**
- **WITNESSING OF DIRECT DISCRIMINATION IN THE WORKPLACE**
 - **BY TYPE OF DISCRIMINATION**
 - **BY REASON FOR DISCRIMINATION**
- **IMPAIRMENTS AND HEALTH CONDITIONS**
- **PARENTAL LEAVE**

In the sections covering each topic, different lens are used to provide a deeper understanding of the data. These lens include:

- Country comparisons
- The market research sector compared to the general public
- A comparison by demographics, including minority group status

In this global report, the data is not analyzed by either ethnicity or religion breakdowns since these are localized in the questionnaire. Please visit a specific country or the special interest reports to read about the findings from these two perspectives. Please visit grbn.org/dei-2021-reports/ to see the range of currently available reports.

A minimum base size of 50 respondents has been set for all reports and no data is shown for any subgroups with a base below this limit.

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INTRODUCTION

INTRODUCTION by Andrew Cannon

Executive Director, GRBN

The GRBN Global Diversity, Equality and Inclusivity (DEI) initiative has been undertaken by GRBN, in collaboration with our national association and corporate partners.

The key objective of the initiative to provide leaders of associations and businesses in the market research and insights sector across the globe with benchmarking data on diversity, equality and inclusivity.

The first phase in this initiative is the **GRBN Global Diversity, Equality & Inclusivity Survey 2021**.

The objective of this survey is to measure, benchmark and report on market research and insights industry employees' attitudes towards diversity, inclusion and equality at work.

The study provides insight into the state of DEI in 10 countries across the globe and provides a benchmark of the market research sector to the general working population.

The 10 countries covered in this initial wave of the research are: Argentina, Australia, Brazil, Canada, Germany, Japan, Norway, Peru, UK and USA



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The survey covers attitudes to workplace culture as it relates to diversity, inclusivity and equality, as well as people's personal experience with, and witnessing of, discrimination.

Based on the research findings we have prepared a number of reports and written summaries of the results. For those of you in a rush, we have prepared a summary report, whilst for those of you with more time you are welcome to explore the full report.

For those of you with special interests, we have prepared a number of country and minority reports.

Whichever report you decide to read, I hope you find them insightful, inspirational and useful as you think about the role you can play in moving the needle on DEI both within our sector, as well as in society more broadly.

If you would like to find out more about this initiative or get involved, please either email me at andrew.cannon@grbn.org or reach out via the [contact form](#) on our website.

Andrew Cannon
Executive Director
The Global Research Business Network, GRBN

THANKING OUR GLOBAL PARTNERS

We would like to thank all of our global partners, without whose valuable contributions, the undertaking of this initiative would not have been possible.

In particular, we would like to thank our Gold Sponsor, **Lucid**, as well as our four silver sponsors Echo MR, E-Tabs, Innovate MR and Schlesinger Group.

We would like to give a special thanks to the companies and organizations who assisted with the various tasks related to this project:

- **Innovate MR**
 - Fieldwork Management, programming, hosting and tabulations
- **E-Tabs**
 - Automated charting and report generation
- **MarketVision and RTi Research**
 - Questionnaire adaptation
- **Empower Translate**
 - Questionnaire translation
- **RTi Research**
 - Factor analysis

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Gold Partner



Silver Partners



Bronze Partners



THANKING OUR LOCAL PARTNERS

We would like to thank all of our fieldwork and national association partners, without whose valuable contributions, the undertaking of this survey would not have been possible.

In particular, we would like to thank the **Market Research Society** for allowing us to use their DEI questionnaire as the base for the GRBN global survey questionnaire.

Country	National Association partner	Fieldwork partners
Argentina	CEIM	Lucid Opinaia
Australia	TRS	Ovation
Brazil	ABEP	Offerwise
Canada	CRIC	Canadian Viewpoint Quest Mindshare
Germany	ADM	Innovate MR Lucid
Japan	JMRA	Rakuten
Norway	Virke	Respons Analyse
Peru	APEIM	Netquest
UK	MRS	Innovate MR Lucid
USA	IA	Innovate MR

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EXECUTIVE SUMMARY

EXECUTIVE SUMMARY



How much time do you have?

We know time is a scarce commodity and appreciate the time you are dedicating to reading this report.

For those of you with very little available time we have prepared an 800 word Super Executive Summary.

If you have a little more time you might want to explore the fuller, 1800 word, Executive Summary.

And finally, for those of you with a desire to dig deeper into the findings we have prepared a full, 4000 plus word, summary of the key findings.

Whichever version you decide to read, we hope you find something insightful, inspirational and useful in the findings.



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SUPER EXECUTIVE SUMMARY

Super Executive Summary (1/2)

CONSIDERATION OF LEAVING CURRENT ORGANIZATION OR ROLE DUE TO DISCRIMINATION OR TO DIVERSITY, EQUALITY OR INCLUSIVITY (DEI) CONCERNS

People working in the MR sector are much less likely than the general population (approximately two-in-ten vs four-in-ten) to have considered leaving their current role or organization due to DEI concerns or discrimination.

WORKPLACE CULTURE - EQUAL OPPORTUNITIES

People working in the MR sector are 30% more likely than people in the general population to believe that everyone DOES NOT have equal opportunities/rewards in the industry (30 vs 23%).

With respect to the minority groups covered by the research, people working in the MR sector are most likely to believe that age and disability status negatively impact equal opportunity in the industry, with four-in-ten or more holding this belief.

Approximately three-in-ten people working in the MR sector believe that everyone DOES NOT have equal opportunities/rewards in the industry because of social status, ethnicity/race, gender and/or family status.

WORKPLACE CULTURE - ATTITUDES TOWARDS DIVERSITY, INCLUSIVITY AND EQUALITY IN THE WORKPLACE

Overall, the opinion of people working in the MR sector is similar to that of the general working population when it comes to workplace DEI culture.

Compared to people in the general population, however, those working in the MR sector are less negative about opportunities and being valued in their workplace,

but are clearly more negative on the diversity of the employee base where they work.

One-in-five people working in the MR sector disagree that their organization is making concerted efforts on DEI matters.

PERSONAL EXPERIENCE OF DIRECT DISCRIMINATION IN THE WORKPLACE - BY TYPE OF DISCRIMINATION

One-in-two people working in the MR sector have personal experience with direct discrimination in the workplace, which is somewhat lower than amongst the general population (six-in-ten).

One-in-five people (21%) working in the MR sector have personal experience of **unfair treatment by the organization** (vs. 29% in the general population), and just under one-in-five (17%) have personal experience of a **negative colleague environment** at work (vs. 25% in the general population).

7% of people working in the MR sector have personal experience with **harassment**, which is much lower than in the general population (16%).

PERSONAL EXPERIENCE OF DIRECT DISCRIMINATION IN THE WORKPLACE - BY REASON FOR DISCRIMINATION

In the MR sector, from the potential reasons covered by the research, **age** and **gender** are the most common reasons cited for discrimination (12 AND 14% respectively).

One-in-four (25%) cisgender females working in the MR sector have had personal experience with **gender** discrimination in the workplace. In contrast only one-in-twenty (2%) cisgender males say the same thing.

Super Executive Summary (2/2)

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One-in-ten LGBTQ+ people, and 15% of LGBTQ+ males, working in the MR sector have had personal experience with **sexual orientation / gender identity** discrimination in the workplace.

Personal experience with discrimination due to **ethnicity/national origin/religion/disability status/social status** is relatively low in the MR sector and lower than amongst the general population for these reasons.

In the MR sector, people with fatigue, mental illness and long-term illness are much more likely than average to have personal experience with discrimination due to **disability status**, and 15% of people working in the MR sector, who have children under 6 have had personal experience with discrimination due to their **family status**.

WITNESSING OF DIRECT DISCRIMINATION IN THE WORKPLACE - BY TYPE OF DISCRIMINATION

Almost one in two people working in the MR sector have witnessed direct discrimination in the workplace, which is marginally lower than amongst the general population (47 vs 53%).

It is, in particular, with respect to harassment that people working in the MR sector are less likely, when compared those in the general working population, to have witnessed discrimination (9 vs 18%).

WITNESSING OF DIRECT DISCRIMINATION IN THE WORKPLACE - BY REASON FOR DISCRIMINATION

Both in the MR sector and in other sectors, gender, age and ethnicity are the

most common reasons cited for witnessed discrimination in the workplace (14, 10 and 8% respectively in the MR sector).

IMPAIRMENTS AND HEALTH CONDITIONS

One-in-three people working in the MR sector say they suffer from at least one of the impairments / health conditions covered by the research. This is much less than the proportion amongst the general population (45%).

As many as one-in-five people working in the MR sector have stress / anxiety.

Around one-third of people with impairments / health conditions, both in and outside of the MR sector, say that their impairment/health condition has put them at a disadvantage when it comes to career progression.

PARENTAL LEAVE

The proportion of people with children, working in the MR sector, who have taken parental leave is very consistent across countries, at around six-in-ten, which is somewhat higher than the proportion amongst the general population (one-in-two).

One-quarter of people working in the MR sector who have taken parental leave believe that doing so put them at a disadvantage when it comes to career progression. This is a higher proportion than in the general population.



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EXECUTIVE SUMMARY

Executive Summary (1/4)

CONSIDERATION OF LEAVING CURRENT ORGANIZATION OR ROLE DUE TO DISCRIMINATION OR TO DIVERSITY, EQUALITY OR INCLUSIVITY (DEI) CONCERNS

People working in the MR sector are much less likely than the general population (approximately two-in-ten vs four-in-ten) to have considered leaving their current role or organization due to DEI concerns or discrimination.

LGBTQ+ and younger people, as well as those working part-time in the MR sector, are more likely than average to have at least sometimes considered leaving current role or organization due to DEI concerns or discrimination. The same is true of people with impairments or health conditions (in particular people with fatigue/stamina, long-term/chronic illness or mental illness issues).

WORKPLACE CULTURE - EQUAL OPPORTUNITIES

People working in the MR sector are 30% more likely than people in the general population to believe that everyone DOES NOT have equal opportunities/rewards in the industry (30 vs 23%). People in the MR sector in Japan, Norway and Peru are least likely to believe there is inequality in the sector.

With respect to the minority groups covered by the research, people working in the MR sector are most likely to believe that age and disability status negatively impact equal opportunity in the industry, with four-in-ten or more holding this belief. In particular, 35 plus year olds see **age** inequality as an issue in the MR sector.

In the MR sector, one-in-three people believe that **gender** negatively impacts equal opportunity/rewards in the industry, even more so amongst cisgender females and LGBTQ+ people.

Just under one-in-five people working in the MR sector believe that **sexual orientation / gender identity** negatively impacts equal opportunity/rewards in the industry, with this proportion rising to one-in-three amongst LGBTQ+ people. LGBTQ+ people working in the MR sector are much more likely to see inequality in the sector than are their peers in the general working population.

One-third of people working in the MR sector believe that **ethnicity** negatively impacts equal opportunity/rewards in the industry.

See individual country reports / the special report on ethnicity/national origin for more key findings on this matter.

Only one-in-ten people working in the MR sector believe that **religion** is a barrier to equal opportunity/rewards in the industry (the lowest proportion for any of the factors measured)

See individual country reports / the special report on ethnicity for more key findings on this matter.

Just over one-in-four people working in the MR sector believe that **disability status** negatively impacts equal opportunity/rewards in the industry. This proportion rises to one-in-two amongst people with impairments / health conditions and to six-in-ten amongst those with mental illness. Amongst those with mental illness this belief is much more pronounced in the MR sector than amongst the general public.

Three-in-ten people working in the MR sector believe that **family status** as a barrier to equal opportunity/rewards, and slightly more than one-in-three people (36%) in the MR sector see **social status** as such a barrier, which is a much higher proportion than amongst the general working population (22%).

Executive Summary (2/4)

WORKPLACE CULTURE - ATTITUDES TOWARDS DIVERSITY, INCLUSIVITY AND EQUALITY IN THE WORKPLACE

Overall the opinions of people working in the MR sector are similar to those of the general working population when it comes to workplace DEI culture, but there are significant differences to be found when digging a bit deeper.

Compared to people in the general population, those working in the MR sector are less negative about opportunities and being valued in general in their workplace, but are clearly more negative on the diversity of the employee base where they work. In particular, they disagree that their organization has a diverse leadership team (41% in the MR sector disagree compared to 24% amongst the general working population).

Opinions on the concerted efforts of their organization on DEI matters

One-in-five people working in the MR sector disagree that their organization is making concerted efforts on DEI matters.

LGBTQ+ people working in the MR sector are more negative about the concerted efforts of their organization on DEI matters than their heterosexual colleagues.

When looking at the impact of impairments / health conditions, it is people with mental illness working in the MR sector who are most negative about the concerted efforts of their organization on DEI matters (three-in-ten vs two-in-ten on average).

PERSONAL EXPERIENCE OF DIRECT DISCRIMINATION IN THE WORKPLACE - BY TYPE OF DISCRIMINATION

One-in-two people working in the MR sector have personal experience with direct discrimination in the workplace, which is somewhat lower than amongst the general population (58%).

One-in-five people (21%) working in the MR sector have personal experience of **unfair treatment by the organization** (vs. 29% in the general population), and just under one-in-five (17%) have personal experience of a **negative colleague environment** at work (vs. 25% in the general population).

7% of people working in the MR sector have personal experience with **harassment**, which is much lower than in the general population (16%).

In the MR sector, age does not correlate with personal experience with discrimination, whereas cisgender males are less likely than others to have such personal experience.

In the MR sector, people with fatigue, mental health and stress conditions are more likely than average to have had personal experience with discrimination.

PERSONAL EXPERIENCE OF DIRECT DISCRIMINATION IN THE WORKPLACE - BY REASON FOR DISCRIMINATION

In the MR sector, from the potential reasons covered by the research, **age** and **gender** are the most common reasons cited for discrimination (12 AND 14% respectively).

Both younger and older adults are more likely than middle-aged people to have personal experience with discrimination because of **age**.

Executive Summary (3/4)

One-in-four (25%) cisgender females working in the MR sector have had personal experience with **gender** discrimination in the workplace, which is significantly higher than in the general population (18%). In contrast only one-in-twenty (2%) cisgender males working in the MR sector have had personal experience with gender discrimination in the workplace, which is significantly lower than in the general population (9%).

Personal experience with **sexual orientation / gender identity** discrimination is low in the MR sector (3%) and much lower than amongst the general population (6%). However, one-in-ten LGBTQ+ people working in the MR sector have had personal experience with sexual orientation / gender identity discrimination in the workplace. This figure rises to 15% amongst LGBTQ+ males.

Personal experience with discrimination due to **ethnicity/national origin** is low in the MR sector (5%/3% respectively) and lower than amongst the general population in both respects.

See individual country reports / the special report on ethnicity for more key findings on this matter.

Personal experience with discrimination due to **religion** is also very low in the MR sector (2%) and much lower than amongst the general population (6%).

See individual country reports / the special report on ethnicity for more key findings on this matter.

Likewise, personal experience with discrimination due to **disability status** is low in the MR sector (3%) and lower than amongst the general population (6%). In the MR sector it is people with fatigue, mental illness and long-term illness who are most likely to have personal experience with discrimination due to

disability status (an average of one-in-ten in these cohorts).

One-in-twenty people in the MR sector have had personal experience with discrimination due to their **family status**. At 15%, the proportion is three times higher amongst those who have children under 6.

Personal experience with discrimination due to **social status** is also very low in the MR sector (3%) and much lower than amongst the general population (9%).

WITNESSING OF DIRECT DISCRIMINATION IN THE WORKPLACE - BY TYPE OF DISCRIMINATION

Almost one in two people working in the MR sector have witnessed direct discrimination in the workplace, which is marginally lower than amongst the general population (47 vs 53%).

Just over one-in-five (22%) of people working in the MR sector have witnessed **unfair treatment by the organization**, which compares to 29% amongst the general population, and one-in-five have witnessed a **negative colleague environment**, which compares to one-in-four amongst the general population.

People working in the MR sector are much less likely to have witnessed **harassment** than people working in other sectors (9 vs 18%).

Executive Summary (4/4)

WITNESSING OF DIRECT DISCRIMINATION IN THE WORKPLACE - BY REASON FOR DISCRIMINATION

Both in the MR sector and in other sectors, gender, age and ethnicity are the most common reasons cited for witnessed discrimination in the workplace (14, 10 and 8% respectively in the MR sector).

One-in-ten people working in the MR sector has witnessed **age** discrimination at work, which is lower than amongst the general public (15%).

Witnessing **gender** discrimination in the workplace is similarly prevalent inside and outside of the MR sector at around 15%.

One-in-five cisgender females working in the MR sector have witnessed gender discrimination in the workplace, which is double the proportion amongst cisgender males in the sector. LGBTQ+ people working in the MR sector are also more likely than their heterosexual colleagues to have witnessed gender discrimination in the workplace.

The witnessing of **sexual orientation / gender identity** discrimination is low in the MR sector and lower than amongst the general population (3 vs 6%). In the MR sector, one-in-twenty LGBTQ+ people have witnessed sexual orientation / gender identity discrimination in the workplace, more than twice the proportion of heterosexual people.

Around one-in-ten people both in and outside of the MR sector have witnessed discrimination in the workplace due to **ethnicity**.

The witnessing of discrimination due to **national origin / religion / disability status / family status / social status** is low in the MR sector and lower than amongst the general population in all these areas.

IMPAIRMENTS AND HEALTH CONDITIONS

One-in-three people working in the MR sector say they suffer from at least one of the impairments / health conditions covered by the research. This is much less than the proportion amongst the general population (45%).

As many as one-in-five people working in the MR sector have stress / anxiety.

6% of people working in the MR sector have **mental illness**, and 4% of people working in the MR sector have **fatigue / low stamina** and/or **breathing difficulties**.

Around one-third of people with impairments / health conditions, both in and outside of the MR sector, say that their impairment/health condition has put them at a disadvantage when it comes to career progression.

In the MR sector, it is those with **mental illness** who are most likely (61%) to say that their health condition has put them at a disadvantage.

PARENTAL LEAVE

The proportion of people with children, working in the MR sector, who have taken parental leave is very consistent across countries, at around six-in-ten, which is somewhat higher than the proportion amongst the general population (one-in-two).

One-quarter of people working in the MR sector who have taken parental leave believe that doing so put them at a disadvantage when it comes to career progression. This is a higher proportion than in the general population.



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THOUGHT
LEADERSHIP

Thought Leadership

by Emel Mohammadally

SVP of EMEA, LUCID (A CINT GROUP COMPANY)



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Improving DE&I in Market Research Starts With Attracting and Retaining Diverse Talent

Real progress on improving diversity, quality, and inclusion within the market research industry needs to be a top priority heading into 2022. Not only will business success depend on it, but the positive ripple effects will extend far beyond the industry itself.

Technology is transforming market research. The industry is changing to keep pace with the future needs of brands, businesses, and researchers, and there is a lot to be excited about. More people than ever rely on our industry for fast and reliable consumer insights. All these forces have made it very clear that the impact our industry has on decisions made around the world is significant.

But, facilitating the continued growth and overall health of the sector relies on internal transformation as well. A change from merely upholding traditional standards of operation to openly

embracing policies, procedures, and even survey qualifications to be more inclusive and representative of where the world is now. A change that will transform DE&I representation in the industry workforce and the final research outputs we help to deliver. A change that must start from within our industry.

It's unsurprising that market research lags behind the general workforce in several areas relating to DE&I. One key finding from the report – 41% of the market research industry workforce disagrees that their organisation has a diverse leadership team, which is almost double that of the general working population.

Thought Leadership

by Emel Mohammadally

SVP of EMEA, LUCID (A CINT GROUP COMPANY)



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Improving DE&I in Market Research Starts With Attracting and Retaining Diverse Talent (cont.)

Change starts from the top, and it starts by taking action. If that doesn't happen, what do we stand to lose? Our greatest asset, our people.

For all the progress that's been made in attracting and retaining top talent, especially as advances in technology and adoption of software bring in new skill sets and fresh perspectives, the so-called "Great Resignation" is still cause for alarm. Focusing on what we can control and where we can take action, there two areas we can address now:

- **The perception of equal opportunity.** This new report shows just how much progress still needs to be made in getting everyone, regardless of gender, ethnicity, sexual orientation, or even parental status, to feel as though they have equal opportunities for career progression. Open conversations and increased transparency can go a long way in diminishing perceived barriers around inequality in opportunities and advancement.

- **Workplace culture.** The last two years may not have been easy, and we're still not back to normal, but one thing is clear: companies have been forced to re-evaluate the workplace. An earlier study on mental health and flexible work Lucid conducted with Vitreous World found that individuals from diverse backgrounds reported that working at home, while lonely at times, was more comfortable than facing potential discrimination in the workplace. An inclusive workplace culture takes time to build and it will require change, but now it's a fundamental expectation.

Thought Leadership

by Steve Becker,

SVP Research and Strategy, Echo MR



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We're doing ok, I guess

Compared to the general population of employers, market research employees are less likely to want to leave their job due to diversity, equality or inclusion issues. I guess since this is our benchmark, we can consider that a win.

But this is also telling us that there is a good chance that someone on this morning's Zoom has thought about leaving their job because of discrimination. At least 1 in 5 in our industry sometimes considers leaving their position or organization due to issues with diversity, equality or inclusion.

I'd say that's still a problem.

There doesn't seem to be a dominant type of discrimination, or a group of people that is impacted more than others. In fact, it's notable that fewer people in our industry report personal experiences with discrimination.

On the other end of the spectrum, market researchers feel like they are more likely than the general population to see rewards and career progression impeded by discrimination. Our industry is also seen as being behind the curve when it comes to formalizing programs dedicated to diversity, equality and inclusivity in the workplace. Employees feel that compared to the general population, MR organizations are less likely to demonstrate a commitment to these issues effectively and that we can make greater efforts to focus on diversity in our hiring practices.

Perhaps this is the result of the industry trailing others in diversity of leadership and employees

Or maybe we aren't achieving more diversity because we're all using the same job descriptions, resources and networks that we've always used. How can we get better and more diverse when we're all fishing in the same lake with the same tackle box?

In our industry we tout our ability to deliver representative audiences for our clients, yet we don't apply the same level of rigor to recruiting and incentivizing our own workforce.

Building a more inclusive foundation within the industry starts with expanding our candidate sourcing and learning to identify and address bias whenever it intrudes into our day-to-day. These can be difficult paths to embark upon, but the learnings are all about self-awareness, and while it may get uncomfortable at times, it's important for our growth as an industry.

We're doing ok, I guess. Let's aim to be better.



Diversity in Research: Inclusive Sampling Strategies

The events of the last few years, including the murders of George Floyd and Breonna Taylor, have brought to light the need for action and further conversations about race, diversity, and equity. In the market research industry, we are tasked with the responsibility of gathering the opinions from each unique viewpoint to best inform future business decisions and influence global change. A crucial role of market research will continue to be helping businesses move away from purely performative, PR-focused gestures and toward actionable results and truly inclusive insights.

Ensuring an inclusive and culturally balanced data set doesn't just happen; it requires intentional execution. The following steps encourage diversity practices in research methodologies, questionnaire design, and panel building:

1. **Examine tried and true research methods and adjust them to be more representative.**

We need to make changes in research methodology to capture

representative data. Surveys should go beyond standard census representation and always allow for as equal access as possible, including, but not limited to, optimizing for mobile responses. Additionally, all profiling questions need inclusive answer choices for gender, race, and ethnicity. Failing to include options for the survey participants identities is an oversight that can lead to higher dropout rates and skews in the data.

2. **Questionnaire design must be reviewed for intentional cultural sensitivity.**

The Multicultural Research Collective, a consortium of diverse research veterans co-founded by InnovateMR CEO Lisa Wilding-Brown, has learned from its research that Hispanic/Latinx communities should have the option to identify country affiliation in order to more accurately reflect the respondent's heritage. Additionally, inclusivity groups should review both the questionnaire design and any creative material to ensure that the study is culturally appropriate and representative.



Diversity in Research: Inclusive Sampling Strategies (cont.)

3. Design your sampling strategy for inclusivity, including oversampling for diverse cohorts and nested quotas.

How researchers gather answers when fielding is paramount in achieving a representative sample. To ensure that all groups are reached appropriately and without shortcomings, collect more responses from diverse groups than will be necessary in the final data set. Researchers must set up nested quotas and use precise targeting to ensure that diverse cohorts are appropriately represented and a readable base is achieved thereby mitigating the need to impute data from these critical audiences.

4. Present stories with the intention of respectfully and authentically connecting with audiences.

Advertising campaigns developed from market research should strive to represent the full spectrum of gender identities, ages, body types, race/ethnicities, cultures, sexual orientations, skin tones, languages, religions/spiritual affiliations, physical and mental abilities, socio-economic

statuses, etc. Avoid operating in a performative way; shallow or uninformed messaging can be detrimental to any brand.

Following these tips and strategies, as well as having transparent conversations with partners and stakeholders about ensuring a multicultural approach in all research, is essential to informing the business strategies of today.

“As a business, we are committed in our ambition to empower brands to eliminate blind spots, craft authentic and intelligent messaging, and convert campaigns into actionable change. Measuring and understanding the consumer of today only helps to increase growth, mitigate risk, remain relevant, and maintain a competitive edge,” InnovateMR CEO Lisa Wilding-Brown said. “We have the power to do that, which will continue to be an incredibly important responsibility for our business and our industry as a whole.”

Thought Leadership

by Jaime Klein,

Chief Talent & Integration Officer,
Schlesinger Group



THE GRBN GLOBAL DIVERSITY, EQUALITY &
INCLUSIVITY (DEI) REPORT 2021 © 2021 GRBN



EVERY VOICE MATTERS: Diversity, Equity, Inclusion & Belonging

Belonging is human. We all want to find our place, connect, and be heard. To contribute and be *someone*. Schlesinger Group knows that diversity, equity, inclusion, and belonging are needed. We have committed—we took the pledge. Much more importantly, diversity, equity, inclusion, and belonging are what we all want, what our employees want. So delivering on our promises means being aware that this goes well beyond the metrics and not everyone is going to be comfortable.

The data uncovered in The GRBN Global Diversity, Equality & Inclusivity Survey report indicates many opportunities for improvement in identifying, addressing, and supporting DEI&B in the market

research sector and beyond. But, make no mistake, this is a hard lift, and the only way towards sustainable, balanced, and committed change is to start with an honest view of your organization's culture.

The core of any valued and protected corporate culture should be a foundation that engrains that feeling of belonging. But how does that show up day-to-day? The best way to make this visible is through how we share, listen, and learn. To be open and create opportunities for employees to voice their unique stories, feelings, experiences, concerns, and ideas.

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EVERY VOICE MATTERS: Diversity, Equity, Inclusion & Belonging (cont.)

The core of any valued and protected corporate culture should be a foundation that engrains that feeling of belonging. But how does that show up day-to-day? The best way to make this visible is through how we share, listen, and learn. To be open and create opportunities for employees to voice their unique stories, feelings, experiences, concerns, and ideas.

At Schlesinger Group, we recognize that race, inequality, bias, and inclusion can be an uncomfortable conversation. Some fear they will say the wrong thing. Others may feel inconsequential and unable to make a meaningful impact. Our commitment is to ensure that every voice is heard and, more importantly, to show our employees that every voice matters. It is the basis for how we want our employees to experience our culture every day. And it is our commitment to deliver and support a diverse workforce operating within an inclusive organization.

To make strides towards this, Schlesinger Group started small by creating Employee Resource Groups (ERGs) to give our employees their own

platform and voice to different underrepresented groups. Currently, these include PRIDE: Promote Respect, Inclusion & Diversity for Everyone, SWAG: Strengthening Women Across Generations, UNITED: United Against Racism, and WELLNESS. In addition, we created an employee-led DEI&B Advisory Council who acts as a change agent and industry mirror to help us as a business engages in the industry and with our diverse clients and respondents inclusively and equitably.

Through the actions of these groups, we have shaped policies, expanded awareness, and seen employees being their authentic selves at work.

While DEI&B is transformative, we know that it must be owned, believed in, and invested in—to take flight.





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METHODOLOGY

The Research Universe

The research for this first phase of the initiative consisted of two separate, but inter-related surveys, covering two different universes:

1. The market research sector
2. The general population

Survey 1 – The market research sector

The global universe for this survey was defined as people aged 18 plus, who are currently working or who have recently worked in the market research sector - market research, insight, data analytics or similar role.

Survey 2 – The general population

The global universe for this survey was defined as people aged 18 to 64, who are currently employed, self-employed, recently furloughed/retired/voluntarily stopped working.

The Questionnaire

A global master questionnaire was developed based on the questionnaire developed by the Market Research Society for their 2020 report on Inclusion, diversity and equality in the market research sector in the UK.

The national association in each country included in the research then localized the questionnaire taking into account customs, standards and legal requirements in their country. Throughout the report, where relevant, these localizations are noted.

Next, where necessary, the localized questionnaires were translated by Empower Translate.

Innovate MR then programmed the questionnaire for field.

Fieldwork

Fieldwork was coordinated by Innovate MR

Survey 1 – The market research sector

In each country included in the research, with the exception of the UK, the national association partner was responsible for the collection of the data using a online link provided. No new data was collected for the UK. Instead data from the 2020 DEI survey conducted by the Market Research Society in the UK was merged into global dataset for this survey.

Survey 2 – The general population

In each country included in the research, the fieldwork partner was responsible for the collection of the data using a online link provided. The sample was designed and quotas set by the fieldwork partners.

Fieldwork for the two surveys was conducted between the 20th October and the 22nd November 2021.

The final sample sizes for both surveys are shown overleaf

Data processing

Upon completion of the fieldwork, Innovate MR cleaned and processed the data. For survey 2, the general population survey, weights were applied to ensure the final data is as representative as feasible of the defined research universe. No weighting was applied to the survey 1 data since no established data exists for that research universe.

Innovate MR proceeded to produce crosstabulations for both surveys based on specifications provided by GRBN.

Finally, E-Tabs then took the crosstabulations and used their automation process to create the reports for this initiative using a template provided by GRBN.

The final sample sizes for both surveys are shown opposite.

In the report, where charts compare the results to the two surveys in detail, only the sample size for the market sector research survey are shown. The sample sizes for the general population survey are appended to this report.

	Survey 1 – The market research sector	Survey 2 – The general population
Total	1995	10447
Argentina	107	1070
Australia	164	1006
Brazil	158	1088
Canada	223	1025
Germany	167	1095
Japan	313	1037
Norway	53	1488
Peru	121	438
UK	470	1099
USA	219	1101

Note on interpreting the results

Care should be taken when interpreting the results presented in this report.

With respect to survey 1, the market research sector, whilst best efforts have been made by all involved to obtain a random sample of people who are working/recently worked in the market research sector survey, we cannot claim that the sample achieved is representative of the research universe, neither by country nor in total, and have no way to validate how close or far we are in terms of representativity.

With respect to survey 2, the general population survey, whilst best effort has been made by all to generate a representative sample of the research universe, we cannot claim that the sample achieved is indeed representative of the research universe, neither by country nor in total, in relation to every angle we are analyzing in this report.

We would like to take this opportunity to remind you at this point of the disclaimer on page 3: The information contained in this report is for general informational purposes only. There are no representations or warranties, expressed or implied, about the completeness, accuracy, reliability, or suitability with respect to the information contained in this report for any purpose. Any use of this information is at your own risk. GRBN neither assumes nor accepts any liability to any party for any loss, damage, or disruption caused by applying the information in this report.

In parts of the survey we refer to 'MINORITY GROUPS'. This encompasses a diverse group of people that may face discrimination in society for any of these socio-demographic attributes.

Variations by country, as requested by our national association partners, are denoted in the attribute list below:

- Age
- Gender
- Sexual Orientation/gender identity
- Ethnicity/race/skin color [not asked in Germany (DE)]
- National Origin [not asked in Germany (DE)]
- Nationality/migration background/skin color [only asked in Germany (DE)]
- Country of Birth [only asked in Canada (CA)]
- Religion/faith/beliefs
- Family Status/caring responsibilities
- Disability/impairment/health condition
- Social Class [not asked in Japan (JP)]

In the context of this research, the term 'minority groups' embraces all sections of society which tend to have minority status, not in terms of demographic size but in terms of access to power. Hence we also include those from lower socio-economic groups within 'minority groups'.

Where we refer to 'women and minority groups' we are not suggesting that women are a minority in the statistical sense. Rather we include women within the segment of society with typically lesser access to power.



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KEY FINDINGS

CONSIDERATION OF LEAVING CURRENT ORGANIZATION OR ROLE DUE TO DISCRIMINATION OR TO DIVERSITY, EQUALITY OR INCLUSIVITY (DEI) CONCERNS

People working in the MR sector are much less likely than the general population (approximately two-in-ten vs four-in-ten) to have considered leaving their current role or organization due to DEI concerns or discrimination. Of the 10 countries surveyed, this is particularly true in Germany and Peru.

People in the MR sector, who have personally experienced or witnessed discrimination in their organization, are more than twice as likely than average to have at least sometimes considered leaving current role or organization due to DEI concerns or discrimination. This phenomenon can also be seen in the general population but not so quite so strongly.

LGBTQ+ and younger people, as well as those working part-time in the MR sector, are more likely than average to have at least sometimes considered leaving current role or organization due to DEI concerns or discrimination.

People with impairments or health conditions are more likely than average to have at least sometimes considered leaving current role or organization due to DEI concerns or discrimination. In the MR sector, this is particularly true with respect to people with fatigue/stamina, long-term/chronic illness or mental illness issues.

In the MR sector, it is cisgender males and heterosexual males, as well as people in more senior management positions who stand out as being less likely than others to have at least sometimes considered leaving current role or organization due to DEI concerns or discrimination.

KEY FINDINGS (2/13)

WORKPLACE CULTURE - EQUAL OPPORTUNITIES

People working in the MR sector are 30% more likely than people in the general population to believe that everyone DOES NOT have equal opportunities/rewards in the industry (30 vs 23%). People in the MR sector in Japan, Norway and Peru are least likely to believe there is inequality in the sector.

With respect to the minority groups covered by the research, people working in the MR sector are most likely to believe that age and disability status negatively impact equal opportunity in the industry, with four-in-ten or more holding this belief.

Approximately one-in-three people working in the MR sector see ethnicity/national origin, family status and/or gender as a reason for inequality in the sector.

Religion and sexual orientation/gender identity the least so. Relative to the general population, age and social class inequality are of particular concern to people working in the MR sector.

Equal Opportunities and Age

Just over one-in-four people working in the MR sector say that **age** negatively impacts equal opportunity/rewards. This opinion is particularly strong in Brazil, Australia and the USA and weakest in Japan, Norway and Peru. The age barrier in the MR sector compared to in the general population is very noticeable in the USA.

In the MR sector, 35 plus year olds are more likely to believe that **age** negatively impacts equal opportunity/rewards in the industry than do 18-34 year olds. The same phenomenon is not discernible in the general population.

Equal Opportunities and Gender

In the MR sector, one-in-three people believe that **gender** negatively impacts equal opportunity/rewards in the industry. This opinion is particularly strong in Brazil and Germany and weakest in Japan, Norway and Brazil. The gender barrier in the MR sector compared to in the general population is most noticeable in Germany.

In the MR sector, it is very noticeable that cisgender females and LGBTQ+ people believe that **gender** negatively impacts equal opportunity/rewards in the industry. Heterosexual cisgender males working in the MR sector are less likely than average to believe that gender negatively impacts equal opportunity/rewards in the industry.

Equal Opportunities and Sexual Orientation / Gender identity

Just under one-in-five people working in the MR sector believe that **sexual orientation / gender identity** negatively impacts equal opportunity/rewards in the industry. This is a particularly strong belief in Brazil and the proportion is also higher than average in the USA. It is clearly least so in Japan.

KEY FINDINGS (3/13)

In the MR sector, LGBTQ+ people are twice as likely to see **sexual orientation / gender identity** as a barrier to equal opportunity/rewards in the industry than are heterosexuals. This phenomenon is much more noticeable in the MR sector than in the general population. In contrast cisgender in the MR sector does not influence opinion on this issue to the same degree as it does in the general population.

In the MR sector, heterosexual cisgender males are much less likely than average to see **sexual orientation / gender identity** as a barrier to equal opportunity/rewards in the industry.

Equal Opportunities and Ethnicity / National Origin

One-third of people working in the MR sector believe that **ethnicity** negatively impacts equal opportunity/rewards in the industry, even more so in Brazil, the UK, Canada, the US and Australia. It is in the UK where this belief in the MR sector is particularly noticeable when compared to the general population.

Compared to many other factors the amount of cross-country variation is very low when it comes to **national origin** being a barrier to equal opportunity/rewards in the industry. The exception is Japan where it is clearly not seen as a barrier.*

Equal Opportunities and Religion

Only one-in-ten people working in the MR sector believe that **religion** is a barrier to equal opportunity/rewards in the industry (the lowest proportion for any of the factors measured) and it is only in Brazil where a significant proportion of people see religion as such a barrier. Religion is

even less of an issue in this respect in Japan nor Peru.*

Equal Opportunities and Disability Status

Just over one-in-four people working in the MR sector believe that **disability status** negatively impacts equal opportunity/rewards in the industry. This opinion is even more widespread in the MR sector in Brazil and Australia, whilst this belief is less than average in Japan, Norway and Peru.

In the MR sector, one-in-two people with impairments / health conditions see **disability status** as a barrier to equal opportunity/rewards in the industry. This figure rises to six-in-ten amongst those with mental illness. For reference, amongst those with mental illness in general public this belief, held by four-in-ten, is still significant, but much less pronounced.

Equal Opportunities and Family Status

Three-in-ten people working in the MR sector believe that **family status** as a barrier to equal opportunity/rewards. Compared to most of the other factors researched, there is relatively little cross-country variation when it comes to seeing this belief. This belief is, however, stronger than average in Brazil, Australia and the UK. In Australia in particular, the belief is much stronger in the MR sector than in the general population.

* See individual country reports / the special reports on ethnicity/religion for more key findings on these matters.

KEY FINDINGS (4/13)

In the MR sector, one's own family status does not impact the likelihood to believe that **family status** is a barrier to equal opportunity/rewards in the industry. This differs from the general population, where those with young children are more likely to believe this is so.

In the MR sector, however, if a person has taken parental leave then they are slightly more likely than average to see **family status** as a barrier to equal opportunity/rewards in the industry.

Equal Opportunities and Social Status

More than one-in-three persons (36%) in the MR sector see **social status** as a barrier to equal opportunity/rewards, which is a much higher proportion than amongst the general working population (22%).

Compared to some of the other factors researched, there is relatively little cross-country variation when it comes to seeing social status as a barrier to equal opportunity/rewards. In the MR industry, this belief is, however, stronger than average in Brazil and least strong in Norway. It is, in particular, in Australia where this belief is much stronger in the MR sector than amongst the general public.

KEY FINDINGS (5/13)

WORKPLACE CULTURE - ATTITUDES TOWARDS DIVERSITY, INCLUSIVITY AND EQUALITY IN THE WORKPLACE

Overall the opinions of people working in the MR sector are similar to those of the general working population when it comes to workplace DEI culture, but there are significant differences to be found when digging a bit deeper.

Compared to people in the general population, those working in the MR sector are less negative about opportunities and being valued in general in their workplace but are clearly more negative on the diversity of the employee base where they work. In particular, they disagree that their organization has a diverse leadership team (41% in the MR sector disagree compared to 24% amongst the general working population).

It is especially in Germany and Norway, where people working in the MR sector disagree that the company where they work has a diverse employee base, and it is in Germany where the difference compared to the general working population is most marked.

Those working in the MR sector in Brazil and Japan are most likely to think negatively about their workplace when it comes to opportunity and recognition, as well as fairness to all employees.

The feeling of not belonging / not being valued is strongest in Japan, both within the MR sector as well as in the general population more

broadly.

People working in the MR sector in Brazil are most likely to disagree that their company makes concerted efforts related to DEI culture. The difference compared to the general population is marked.

Opinions on the concerted efforts of their organization on DEI matters

One-in-five people working in the MR sector disagree that their organization is making concerted efforts on DEI matters.

LGBTQ+ people working in the MR sector are more negative about the concerted efforts of their organization on DEI matters than their heterosexual colleagues. This phenomenon is more pronounced in the MR sector than in the general population.

Digging deeper, heterosexual cisgender females working in the MR sector are somewhat more negative about the concerted efforts of their organization on DEI matters than their male heterosexual colleagues.

When looking at the impact of impairments / health conditions, it is people with mental illness working in the MR sector who are most negative about the concerted efforts of their organization on DEI matters (three-in-ten vs four-in-ten on average). This phenomenon is not noticeable amongst the general public.

KEY FINDINGS (6/13)

PERSONAL EXPERIENCE OF DIRECT DISCRIMINATION IN THE WORKPLACE - BY TYPE OF DISCRIMINATION

One-in-two people working in the MR sector have personal experience with direct discrimination in the workplace, which is somewhat lower than amongst the general population (58%).

Those working in the MR sector in Brazil and the UK (two-thirds of more) are more likely than others to have experienced discrimination.

One-in-five people (21%) working in the MR sector have personal experience of **unfair treatment by the organization** (vs. 29% in the general population). Such experience in the MR sector is even more common in Brazil, the UK and Australia.

Just under one-in-five (17%) of people working in the MR sector have personal experience of a **negative colleague environment** at work (vs. 25% in the general population). People working in the MR sector in Brazil and the UK are even more likely to have such an experience.

7% of people working in the MR sector have personal experience with **harassment**, which is much lower than in the general population (16%).

In the MR sector, age does not correlate with personal experience with discrimination, whereas amongst the general population, younger adults are more likely to have personal experience with discrimination.

In the MR sector, cisgender males are less likely than others to have personal experience with direct discrimination in the workplace. Amongst the general population, not cisgender males and females are much more likely than their cisgender counter-parts to have personal experience with direct discrimination in the workplace.

In the MR sector, people with fatigue, mental health and stress conditions are more likely to have had personal experience with discrimination. Amongst the general population, those with neurodiversity are the most likely to have had personal experience with discrimination.

PERSONAL EXPERIENCE OF DIRECT DISCRIMINATION IN THE WORKPLACE - BY REASON FOR DISCRIMINATION

In the MR sector, from the potential reasons covered by the research, **age** and **gender** are the most common reasons cited for discrimination (12 AND 14% respectively). Whilst in general, personal experience with discrimination is lower in the MR sector than amongst the general population, this is not the case with respect to gender discrimination where it is equally prevalent in the MR sector as the general population.

KEY FINDINGS (7/13)

PERSONAL EXPERIENCE OF DIRECT DISCRIMINATION IN THE WORKPLACE DUE TO AGE

In the MR sector, age discrimination is most prevalent in Brazil and Australia. In Australia the level of age discrimination in the MR sector surpasses that of the level amongst the general population. Age discrimination in the MR sector is lowest in Argentina, Peru and Japan.

Both younger and older adults are more likely than middle-aged people to have personal experience with discrimination because of age. Amongst the general population, it is, in particular, younger adults who have personal experience with discrimination due to age.

PERSONAL EXPERIENCE OF DIRECT DISCRIMINATION IN THE WORKPLACE DUE TO GENDER, GENDER IDENTITY OR SEXUAL ORIENTATION

Almost one-in-five people working in the MR sector in Europe or North America have had personal experience with gender discrimination. This is higher than in the general population in those regions. Personal experience with gender discrimination is low in Japan, Norway and Peru.

One-in-four (25%) cisgender females working in the MR sector have had personal experience with gender discrimination in the workplace, which is significantly higher than in the general population (18%). In contrast only one-in-twenty (2%) cisgender males working in the MR sector have had personal experience with gender discrimination in the workplace, which is significantly lower than in the general population (9%).

Personal experience with sexual orientation / gender identity discrimination is low in the MR sector (3%) and much lower than amongst the general population (6%).

However, one-in-ten LGBTQ+ people working in the MR sector have had personal experience with sexual orientation / gender identity discrimination in the workplace, which is similar to the proportion in the general population.

Amongst the general public as many as one-in-five not cisgender males or females have had personal experience with sexual orientation / gender identity discrimination in the workplace.

Both in the MR sector as well as amongst the general population, LGBTQ+ males (15%) are more likely to have had personal experience with sexual orientation / gender identity discrimination in the workplace.

PERSONAL EXPERIENCE OF DIRECT DISCRIMINATION IN THE WORKPLACE DUE TO ETHNICITY OR NATIONAL ORIGIN

Personal experience with discrimination due to ethnicity is low in the MR sector (5%) and lower than amongst the general population (9%). The difference compared to the general population is most noticeable in Brazil, Peru and the USA.

KEY FINDINGS (8/13)

The experiencing of discrimination due to national origin is low in the MR sector (3%) and is also low amongst the general population (5%). The difference compared to the general population is most noticeable in Brazil, Peru and the USA. Amongst the general public, personal experience with discrimination due to national origin it is highest in Peru, the UK and the USA.

PERSONAL EXPERIENCE OF DIRECT DISCRIMINATION IN THE WORKPLACE DUE TO RELIGION

Personal experience with discrimination due to religion is very low in the MR sector (2%) and much lower than amongst the general population (6%). The difference compared to the general population is most noticeable in Brazil and Germany.

PERSONAL EXPERIENCE OF DIRECT DISCRIMINATION IN THE WORKPLACE DUE TO DISABILITY STATUS

Personal experience with discrimination due to disability status is low in the MR sector (3%) and lower than amongst the general population (6%). Amongst the general population, Germany stands out as the country where personal experience with discrimination due to disability status is highest and at 12% is double the cross-country average.

In the MR sector it is people with fatigue, mental illness and long-term illness who are most likely to have personal experience with

discrimination due to disability status (an average of one-in-ten in these cohorts).

Amongst the general population, it is people with mobility restrictions and neurodiversity who have the most personal experience with discrimination due to disability status (one-in-five). NB. Low bases prevent a similar analysis in the MR sector).

PERSONAL EXPERIENCE OF DIRECT DISCRIMINATION IN THE WORKPLACE DUE TO FAMILY STATUS

One-in-twenty people in the MR sector have had personal experience with discrimination due to their family status. The proportion is similar across all countries except Brazil where it is double.

15% of people working in the MR sector who have children under 6 say they have personal experience with discrimination due to family status, which is three times the average.

PERSONAL EXPERIENCE OF DIRECT DISCRIMINATION IN THE WORKPLACE DUE TO SOCIAL STATUS

Personal experience with discrimination due to social status is very low in the MR sector (3%) and much lower than amongst the general population (9%). The difference compared to the general population is most noticeable in Latin America (3% vs 14%).

WITNESSING OF DIRECT DISCRIMINATION IN THE WORKPLACE - BY TYPE OF DISCRIMINATION

Almost one in two people working in the MR sector have witnessed direct discrimination in the workplace, which is marginally lower than amongst the general population (47 vs 53%). It is in particular with respect to harassment that people working in the MR sector are the least likely when compared those in the general working population to have witnessed discrimination.

Based on the average across all factors, the witnessing of direct discrimination in the MR sector is highest in Brazil and the UK, and lowest in Japan, Norway and Peru.

Just over one-in-five (22%) of people working in the MR sector have witnessed **unfair treatment by the organization**, which compares to 29% amongst the general population, and one-in-five have witnessed a **negative colleague environment**, which compares to one-in-four amongst the general population.

Relative to the general population, people working in the MR sector in Argentina and Peru are much less likely to have witnessed either unfair treatment or a negative colleague environment.

People working in the MR sector are much less likely to have witnessed **harassment** than people working in other sectors (9 vs 18%). By country, the witnessing of harassment in the MR sector is relatively high in Brazil,

whilst low in Norway and Peru.

WITNESSING OF DIRECT DISCRIMINATION IN THE WORKPLACE - BY REASON FOR DISCRIMINATION

Both in the MR sector and in other sectors, gender, age and ethnicity are the most common reasons cited for witnessed discrimination in the workplace (14, 10 and 8% respectively in the MR sector).

THE WITNESSING OF DIRECT DISCRIMINATION IN THE WORKPLACE DUE TO AGE

One-in-ten people working in the MR sector has witnessed age discrimination at work, which is lower than amongst the general public (15%).

In the MR sector, the witnessing of age discrimination is most prevalent in Brazil. Witnessed age discrimination in the MR sector is almost non-existent in Peru, whilst in that country it is very prevalent amongst the general population.

Younger adults are slightly more likely to have witnessed discrimination because of age, especially in the general population.

THE WITNESSING OF DIRECT DISCRIMINATION IN THE WORKPLACE DUE TO GENDER, GENDER IDENTITY OR SEXUAL ORIENTATION

Witnessing gender discrimination in the workplace is similarly prevalent inside and outside of the MR sector at around 15%.

KEY FINDINGS (10/13)

This figure rises to almost one-in-four amongst people working in the MR sector in Brazil, Germany and the UK, which is higher than in the general population in those countries. The witnessing of gender discrimination is very low in Japan, Norway and Peru, especially in the MR sector in those countries.

One-in-five cisgender females working in the MR sector have witnessed gender discrimination in the workplace, which is significantly higher than in the general population, and double the proportion amongst cisgender males in the sector. LGBTQ+ people working in the MR sector are also more likely than their heterosexual colleagues to have witnessed gender discrimination in the workplace.

The witnessing of sexual orientation / gender identity discrimination is low in the MR sector and lower than amongst the general population (3 vs 6%). The exception is Brazil, where more than one-in-ten people both in and outside of the MR sector say they have witnessed discrimination due to sexual orientation / gender identity

Amongst the general public, the witnessing of sexual orientation / gender identity discrimination is particularly high amongst not cisgender people (reaching almost one-in-five). In the MR sector, one-in-twenty LGBTQ+ people have witnessed sexual orientation / gender identity discrimination in the workplace, more than twice the proportion of heterosexual people.

Amongst the general public, the witnessing of sexual orientation / gender identity discrimination is particularly high amongst LGBTQ+ not cisgender people, reaching over one-in-five.

THE WITNESSING OF DIRECT DISCRIMINATION IN THE WORKPLACE DUE TO ETHNICITY OR NATIONAL ORIGIN

Around one-in-ten people both in and outside of the MR sector have witnessed discrimination in the workplace due to ethnicity. In Argentina, Japan, Norway and Peru, few people in the MR sector have witnessed discrimination in the workplace due to ethnicity.

The witnessing of discrimination due to national origin is low in the MR sector and lower than amongst the general population (3 vs 6%).

THE WITNESSING OF DIRECT DISCRIMINATION IN THE WORKPLACE DUE TO RELIGION

The witnessing of discrimination in the workplace due to religion is very low in the MR sector and much lower than amongst the general population (2 vs. 6%). Amongst the general population such discrimination is most witnessed in Brazil, Germany and the USA.

THE WITNESSING OF DIRECT DISCRIMINATION IN THE WORKPLACE DUE TO DISABILITY STATUS

The witnessing of discrimination due to disability status is low in the MR sector and much lower than amongst the general population (3 vs 6%). Amongst the general population, as well as in the MR sector, Germany stands out as the country where the witnessing of personal experience with discrimination due to disability status is highest (12 and 6% respectively).

KEY FINDINGS (11/13)

THE WITNESSING OF DIRECT DISCRIMINATION IN THE WORKPLACE DUE TO FAMILY STATUS

The witnessing of discrimination at work due to family status is much lower in the MR sector than amongst the general public (4 vs 7%).

6% of people working in the MR sector who have children under 6 say they have witnessed discrimination due to family status.

THE WITNESSING OF DIRECT DISCRIMINATION IN THE WORKPLACE DUE TO SOCIAL STATUS

The witnessing of discrimination in the workplace due to social status is low in the MR sector and lower than amongst the general population (5 vs 9%). Such discrimination in the MR sector is most noticeable in Brazil.

KEY FINDINGS (12/13)

IMPAIRMENTS AND HEALTH CONDITIONS

One-in-three people working in the MR sector say they suffer from at least one of the impairments / health conditions covered by the research. This is much less than the proportion amongst the general population (45%).

As many as one-in-five people working in the MR sector have stress / anxiety.

Stress and anxiety can be seen amongst those working in the MR sector in many countries. The exceptions are Germany, Japan and Peru, countries where the prevalence of stress / anxiety is also relatively low amongst the general population.

6% of people working in the MR sector have **mental illness**. The proportion of people with mental illness working in the MR sector is relatively high in Australia, the US, the UK and Canada. Australia stands out as a country where the proportion in the MR sector equals that in the general population, whereas elsewhere it tends to be lower.

4% of people working in the MR sector have **fatigue / low stamina**. As a country, Germany stands out as a place where more people in the working population say they have fatigue / low stamina than in the MR sector. In the MR sector, it is in Peru where the highest proportion of people say they have fatigue / low stamina.

4% of people working in the MR sector have **breathing difficulties**. As

countries, Germany and the USA stand out as places where relatively many people in the general working population say they have breathing difficulties. This is not the case in the MR sector in those countries.

Around one-third of people with impairments / health conditions, both in and outside of the MR sector, say that their impairment/health condition has put them at a disadvantage when it comes to career progression. By country the proportion is highest in Australia and the UK.

In the MR sector, it is those with **mental illness** who are most likely (61%) to say that their health condition has put them at a disadvantage.

KEY FINDINGS (13/13)

PARENTAL LEAVE

The proportion of people with children, working in the MR sector, who have taken parental leave is very consistent across countries, at around six-in-ten, which is somewhat higher than the proportion amongst the general population (one-in-two). The exception is Japan where only around one-in-four parents in the MR sector have done so. The low incidence of parental leave is also clearly noticeable amongst the general population in Japan. Argentina and Peru stand out as countries where the taking of parental leave is much more common in the MR sector than amongst the general population.

One-quarter of people working in the MR sector who have taken parental leave believe that doing so put them at a disadvantage when it comes to career progression. This is a higher proportion than in the general population.



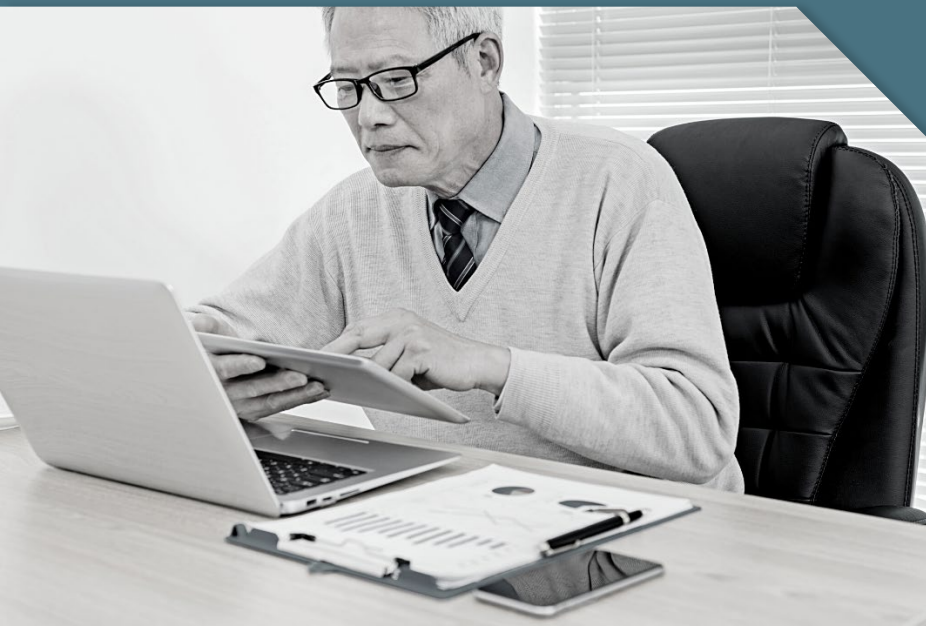
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CONSIDERATION OF LEAVING
CURRENT ORGANIZATION OR
ROLE DUE TO DISCRIMINATION
OR TO DIVERSITY, EQUALITY
OR INCLUSIVITY (DEI)
CONCERNS

CONSIDERATION OF LEAVING CURRENT ORGANIZATION OR ROLE DUE TO DISCRIMINATION OR TO DIVERSITY, EQUALITY OR INCLUSIVITY (DEI) CONCERNS



This section of the report looks at the extent to which people have considered leaving their current organization or role due to discrimination or DEI concerns.

The question was asked using the scale:

- Never
- Sometimes
- Often
- I did leave for these reasons
- Prefer not to say

In this section we deep dive into the data based on those who have sometimes / often / did already leave their current organization or role due to discrimination or DEI concerns.

CONSIDERATION OF LEAVING CURRENT ORGANIZATION OR ROLE DUE TO DISCRIMINATION OR TO DIVERSITY, EQUALITY OR INCLUSIVITY (DEI) CONCERNS

People working in the MR sector are much less likely than the general population (approximately two-in-ten vs four-in-ten) to have considered leaving their current role or organization due to DEI concerns or discrimination. Of the 10 countries surveyed, this is particularly true in Germany and Peru.

People in the MR sector, who have personally experienced or witnessed discrimination in their organization, are more than twice as likely than average to have at least sometimes considered leaving current role or organization due to DEI concerns or discrimination. This phenomenon can also be seen in the general population but not so quite so strongly.

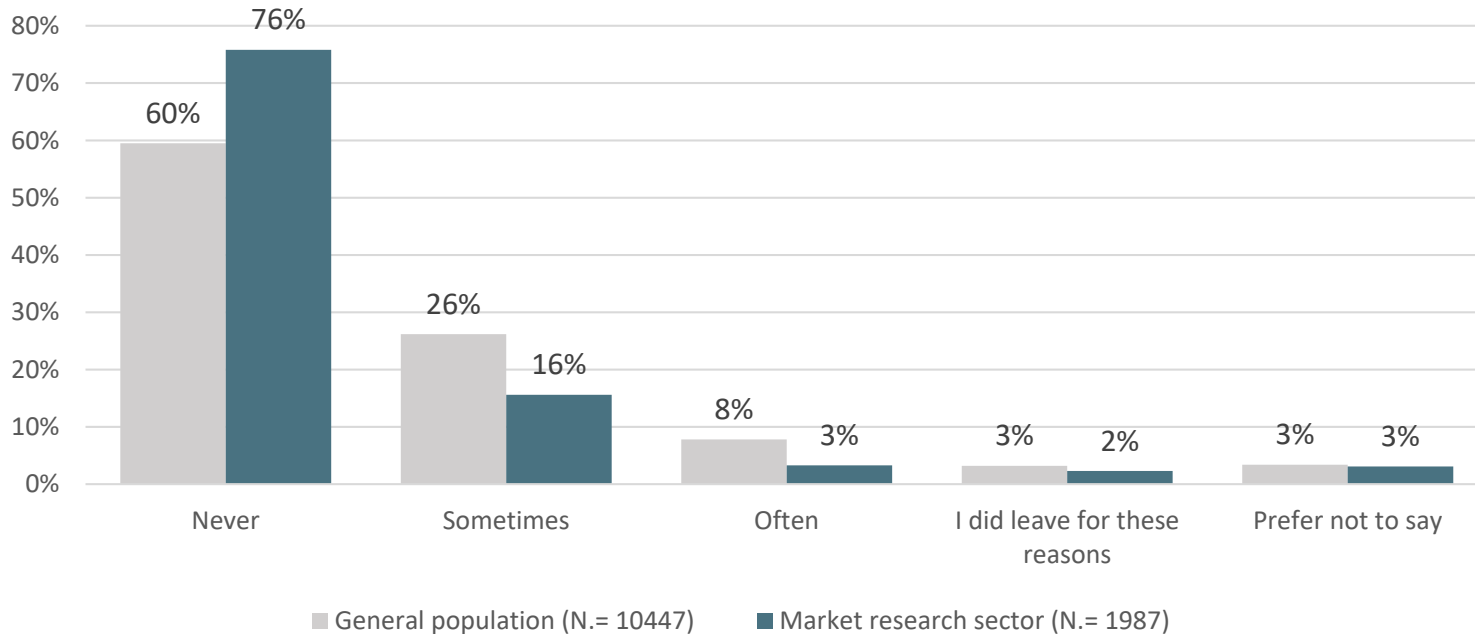
LGBTQ+ and younger people, as well as those working part-time in the MR sector, are more likely than average to have at least sometimes considered leaving current role or organization due to DEI concerns or discrimination.

People with impairments or health conditions are more likely than average to have at least sometimes considered leaving current role or organization due to DEI concerns or discrimination. In the MR sector, this is particularly true with respect to people with fatigue/stamina, long-term/chronic illness or mental illness issues.

In the MR sector, it is cisgender males and heterosexual males, as well as people in more senior management positions who stand out as being less likely than others to have at least sometimes considered leaving current role or organization due to DEI concerns or discrimination.

People working in the MR sector are much less likely than the general population to have considered leaving their current role or organization due to DEI concerns or discrimination.

Considered leaving current role or organization due to DEI concerns or discrimination

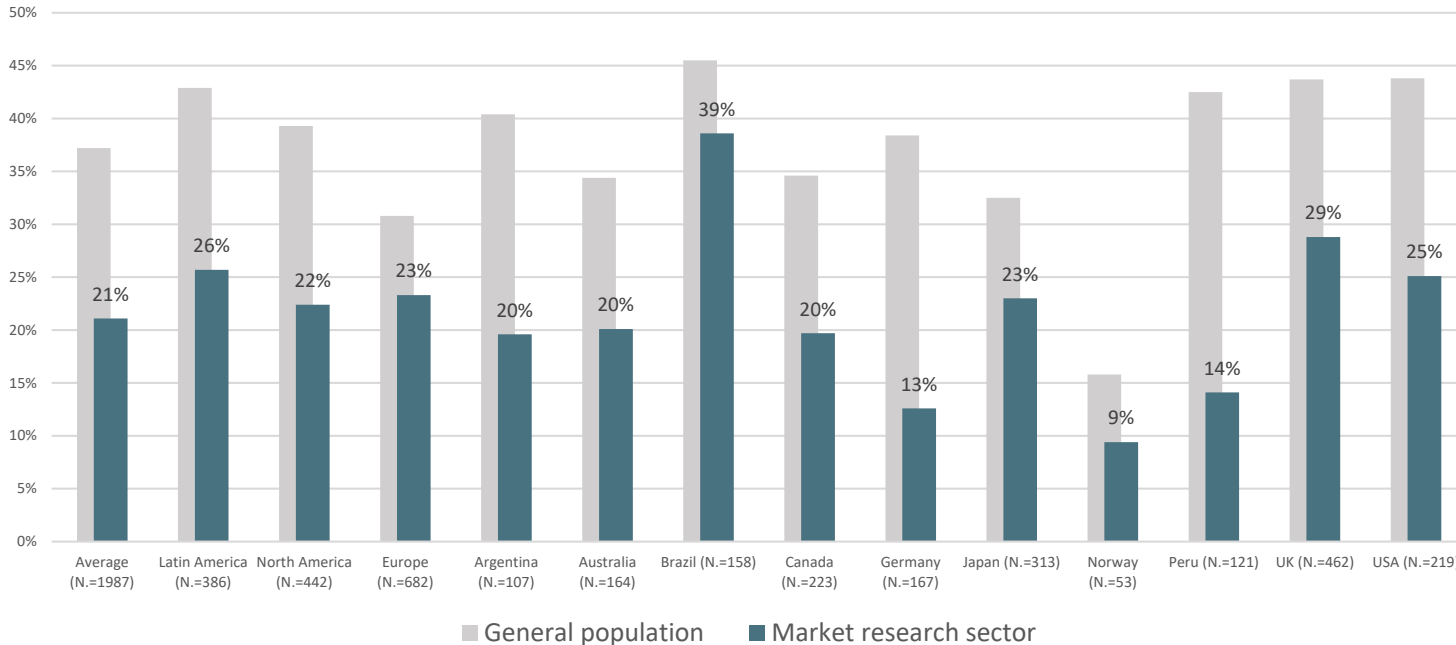


Average across countries surveyed.

Base: All respondents.

People working in the MR sector in Germany, Norway and Peru are the least likely to say that they have considered leaving their role or organization because of DEI concerns or discrimination. In Germany and Peru the proportion is also very low when compared to the general population levels.

% Having at least sometimes considered leaving current role or organization due to DEI concerns or discrimination - By Country

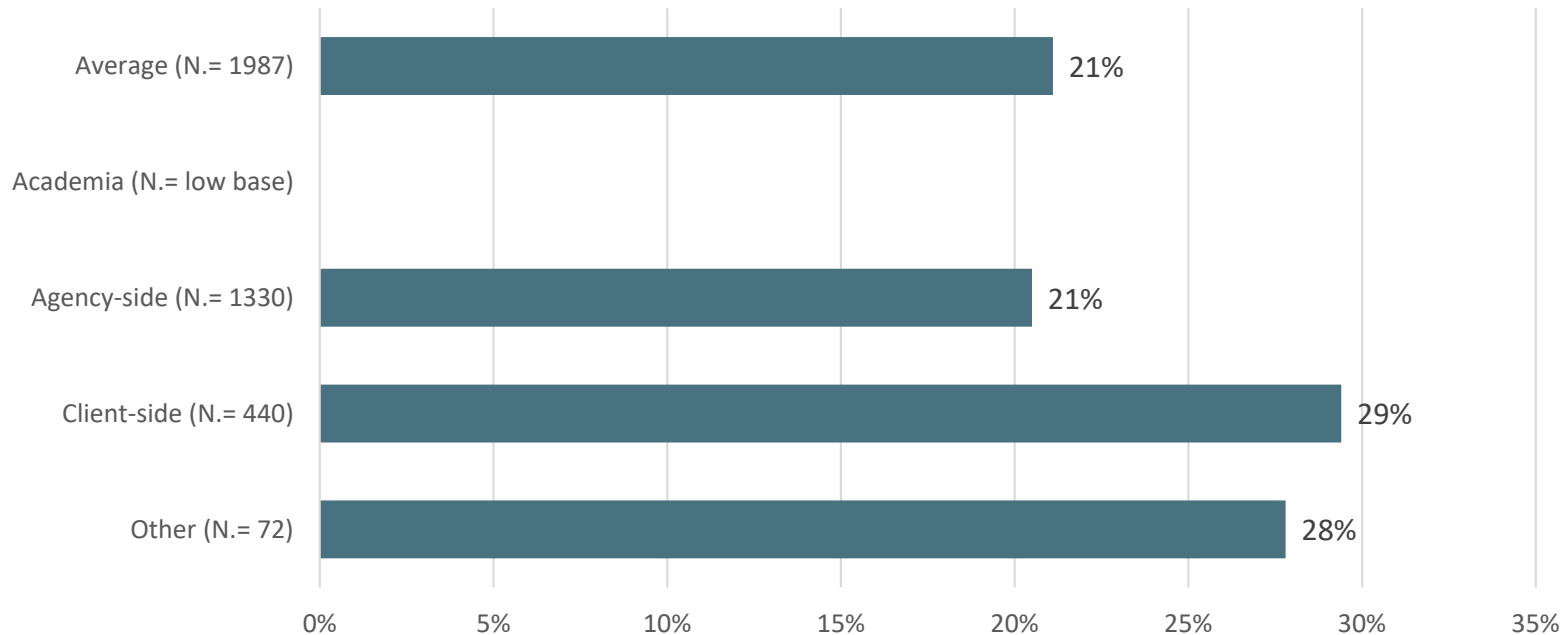


Base: All respondents.

Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

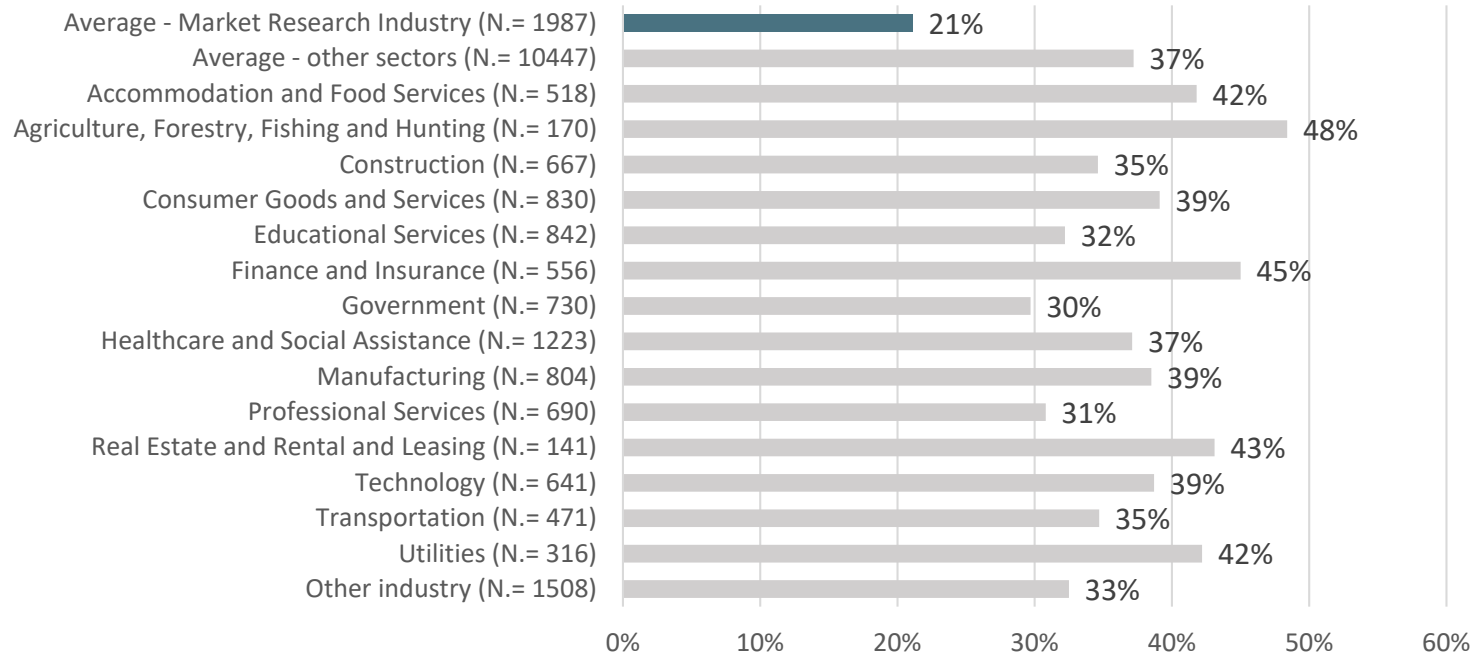
% Having at least sometimes considered leaving current role or organization due to DEI concerns or discrimination- By Part of the Market Research Sector Working in



Average across
countries surveyed.

Base: All
respondents.

% Having at least sometimes considered leaving current role or organization due to DEI concerns or discrimination- By Sector Working in

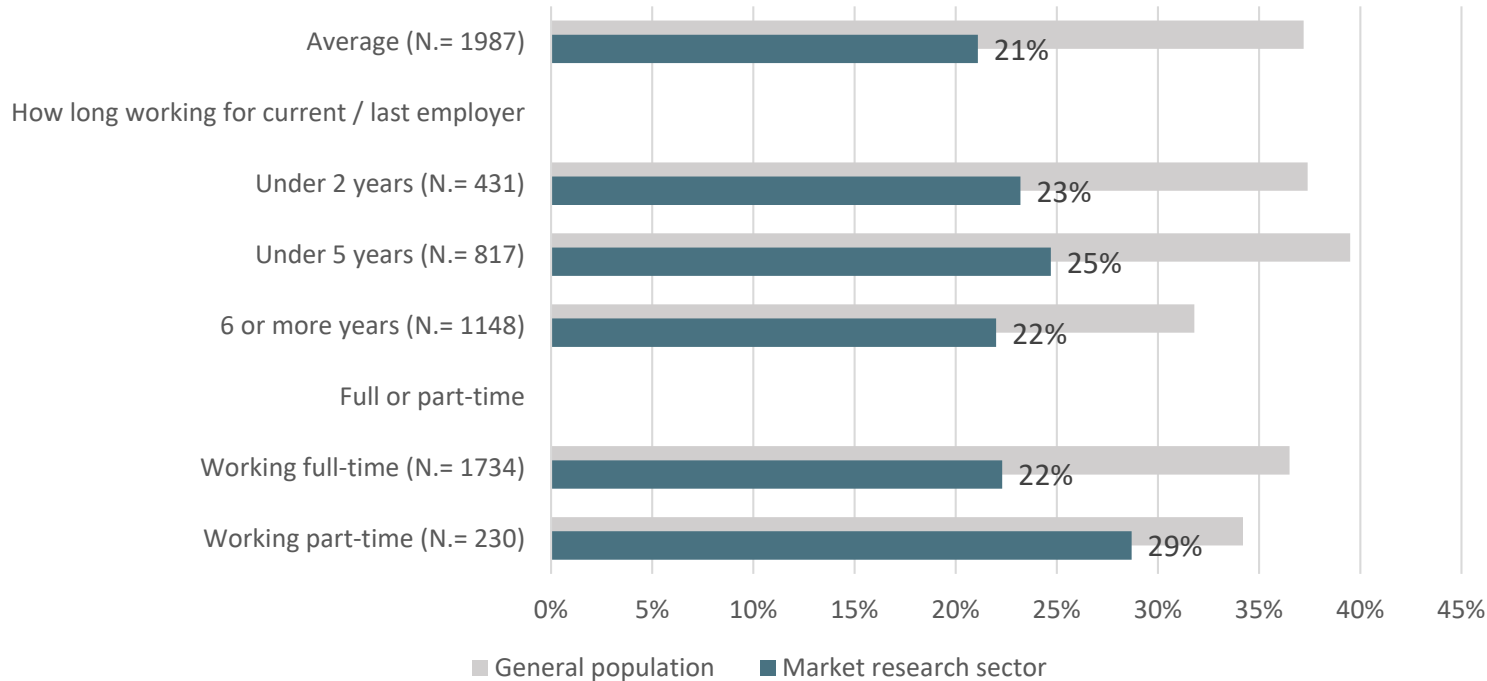


Average across countries surveyed.

Base: All respondents.

Those working part-time in the MR sector are more likely to have at least sometimes considered leaving current role or organization due to DEI concerns or discrimination than those working full-time. This is not the case amongst the general population.

% Having at least sometimes considered leaving current role or organization due to DEI concerns or discrimination - By Working Status



Average across countries surveyed.

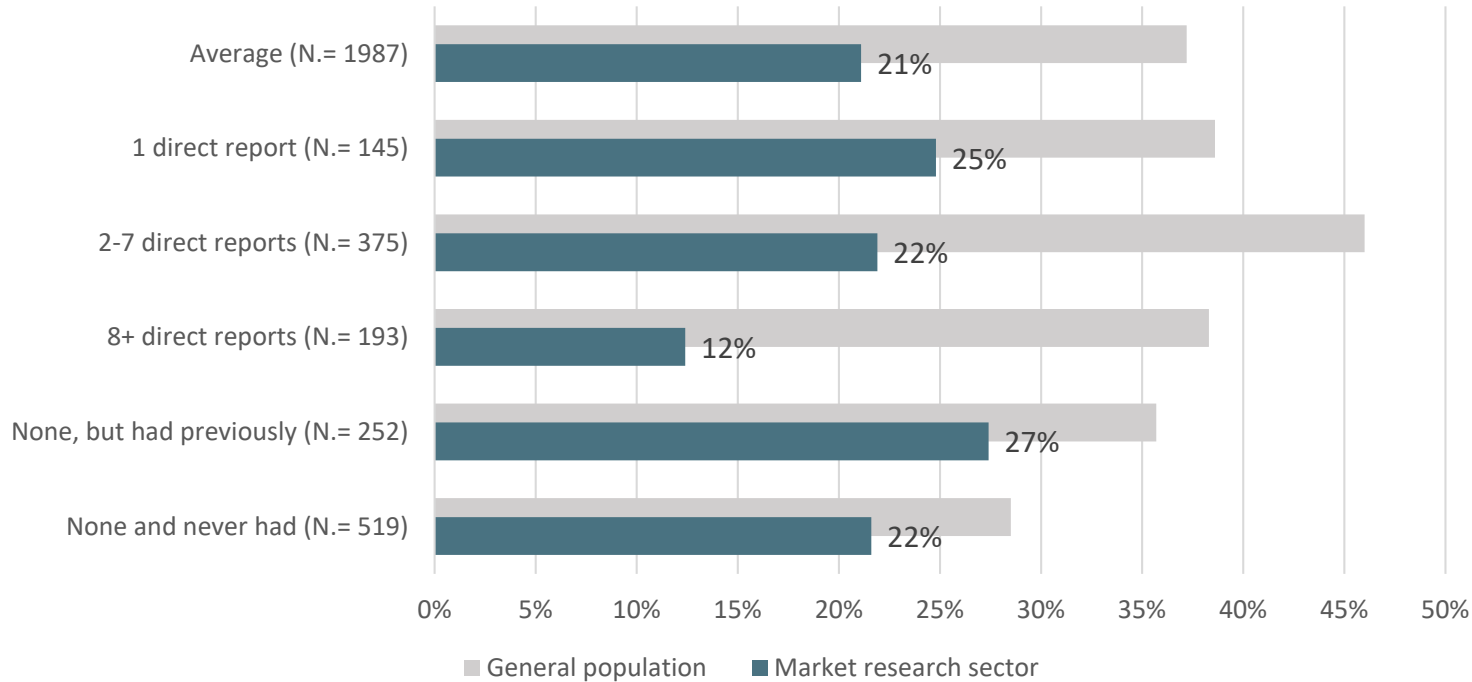
Base: All respondents.

Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

Those in more senior positions in the MR sector are less likely than average to have at least sometimes considered leaving current role or organization due to DEI concerns or discrimination. This is not the case amongst the general population.

% Having at least sometimes considered leaving current role or organization due to DEI concerns or discrimination - By Number of Direct Reports



Average across countries surveyed.

Base: All respondents.

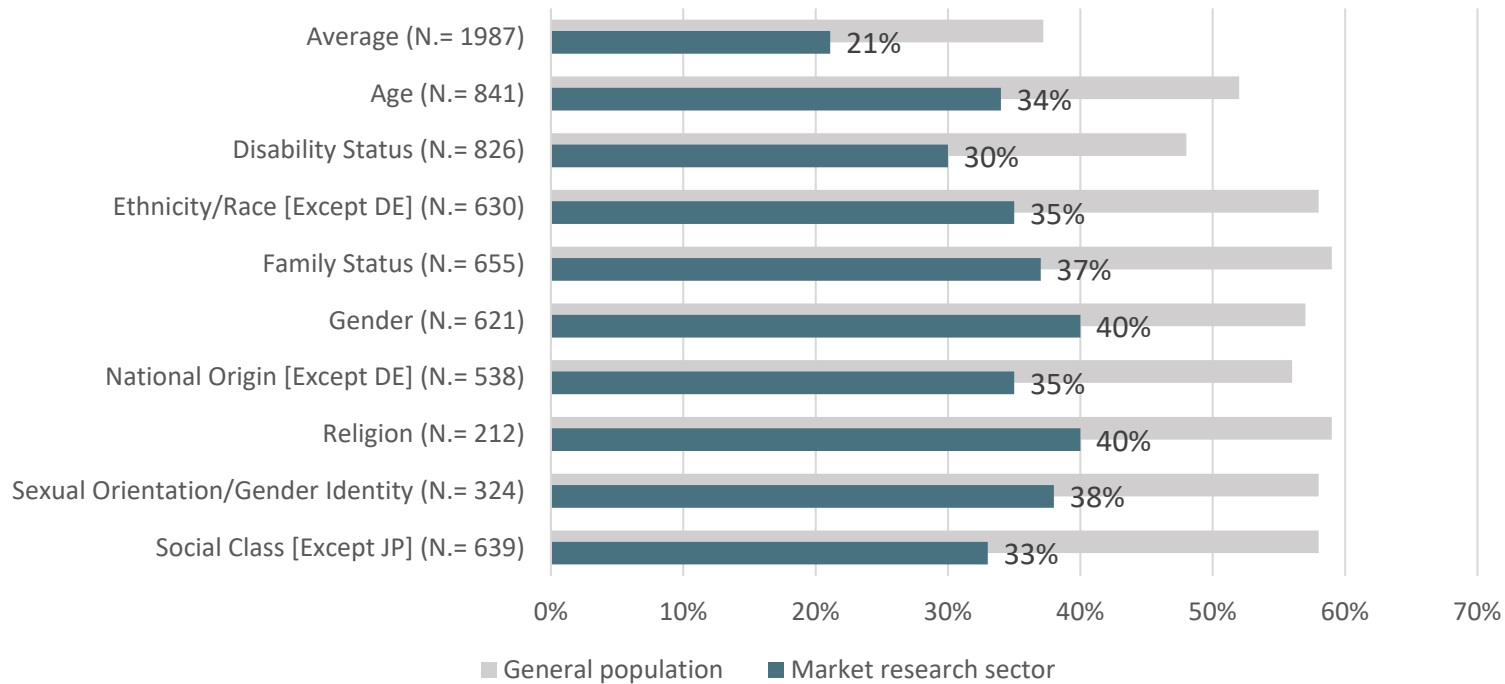
Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

People who see a lack of equal opportunity in their organization are much more likely to have at least sometimes considered leaving current role or organization due to DEI concerns or discrimination This phenomenon can be seen both in the MR sector as well as in the general population.

% Having at least sometimes considered leaving current role or organization due to DEI concerns or discrimination

- By Does NOT believe that everyone has the same opportunities to progress and is rewarded fairly by:



Average across countries surveyed.

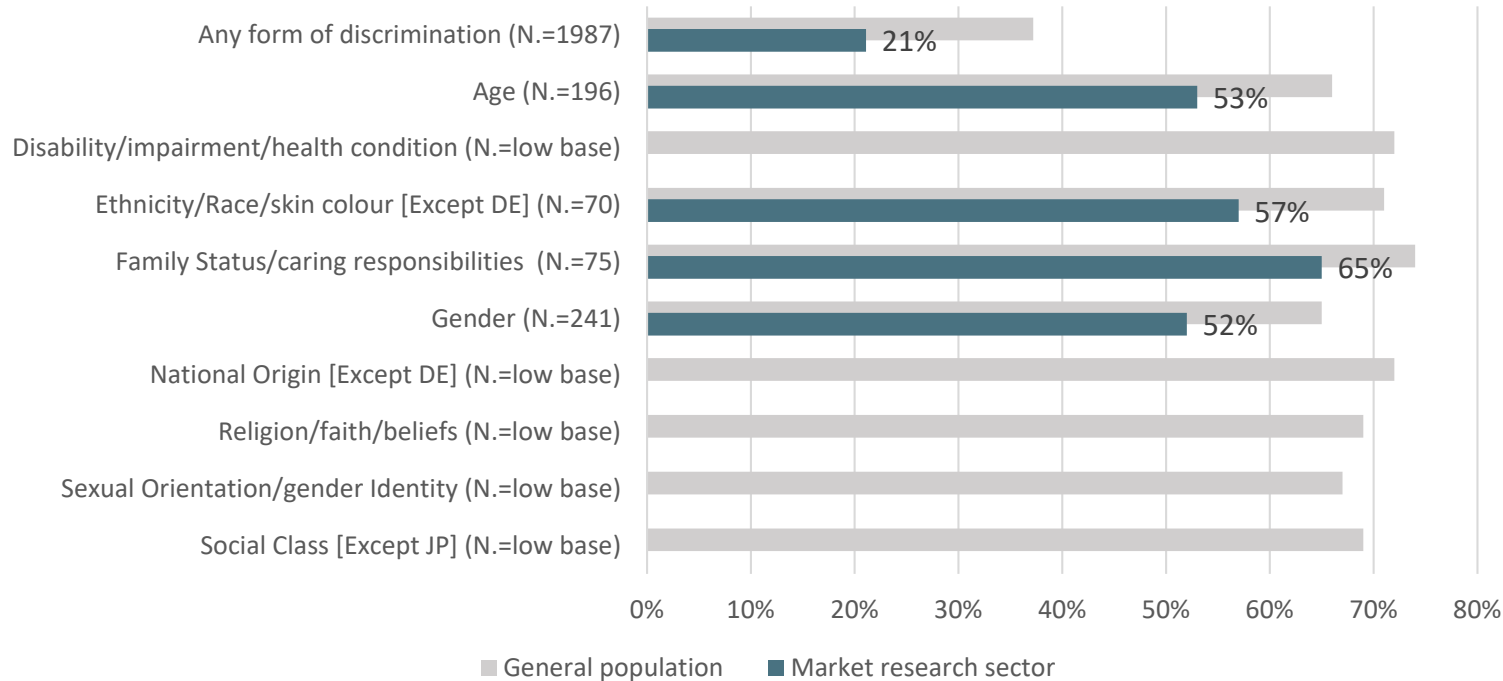
Base: All respondents.

Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

People in the MR sector, who have personally experienced discrimination in their organization, are more than twice as likely than average to have at least sometimes considered leaving current role or organization due to DEI concerns or discrimination. This phenomenon can also be seen in the general population but not so quite so strongly.

% Having at least sometimes considered leaving current role or organization due to DEI concerns or discrimination - By type of discrimination personally experienced



Average across countries surveyed.

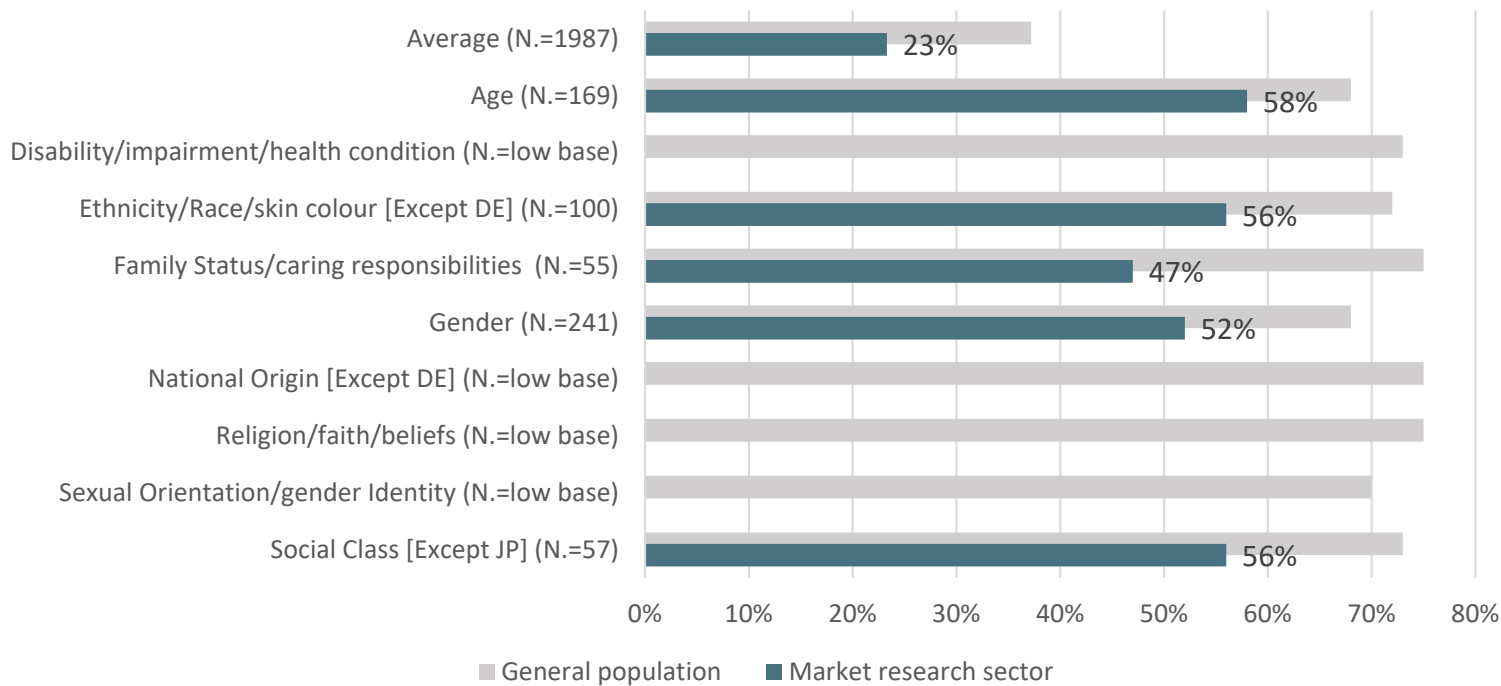
Base: All respondents.

Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

Likewise, people in the MR sector, who have witnessed discrimination in their organization, are more than twice as likely than average to have at least sometimes considered leaving current role or organization due to DEI concerns or discrimination.

% Having at least sometimes considered leaving current role or organization due to DEI concerns or discrimination - By type of discrimination witnessed



Average across countries surveyed.

Base: All respondents.

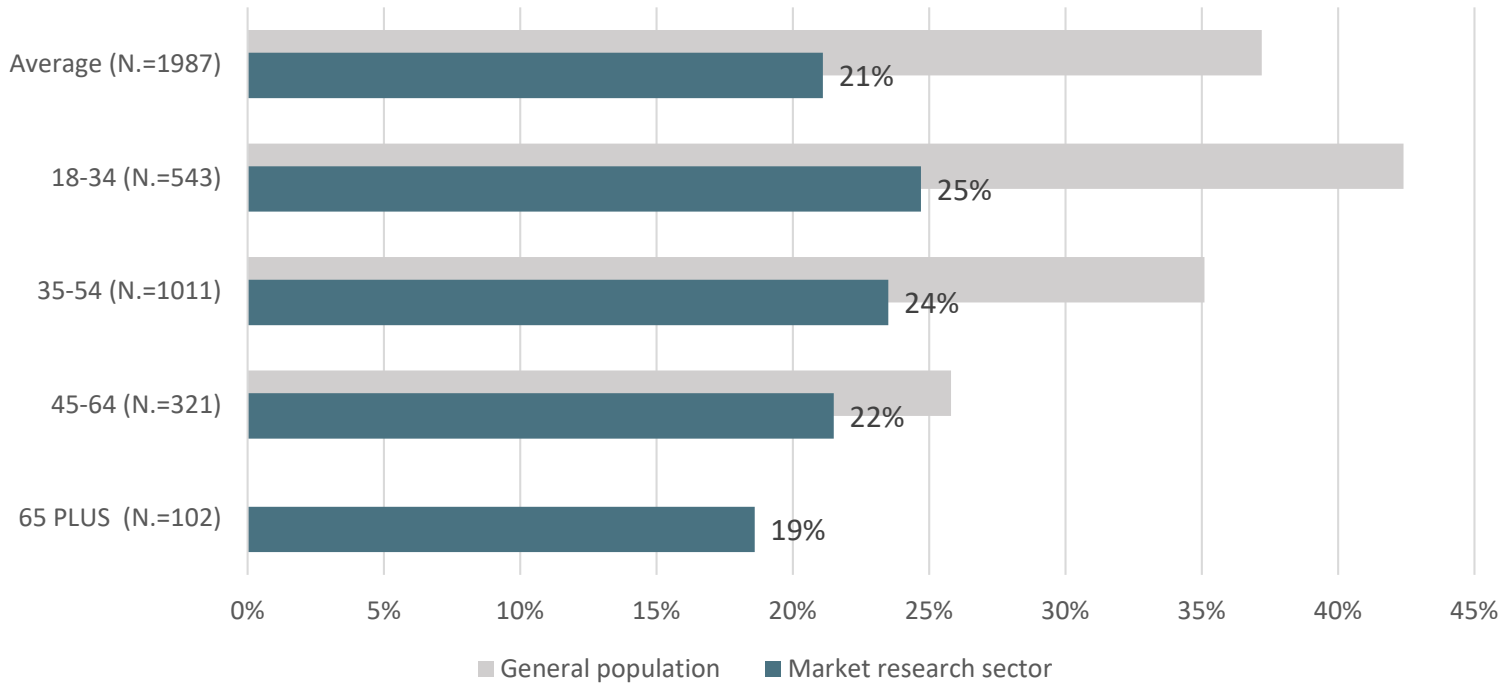
Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

Younger people are more likely than older people to have at least sometimes considered leaving current role or organization due to DEI concerns or discrimination. This is particularly so in the general population.

% Having at least sometimes considered leaving current role or organization due to DEI concerns or discrimination

– By Age Group



Average across countries surveyed.

Base: All respondents.

Note: Market research sector in UK is based on 16+. All data in Japan is based on 20+.

Base numbers shown for Market Research Sector only.

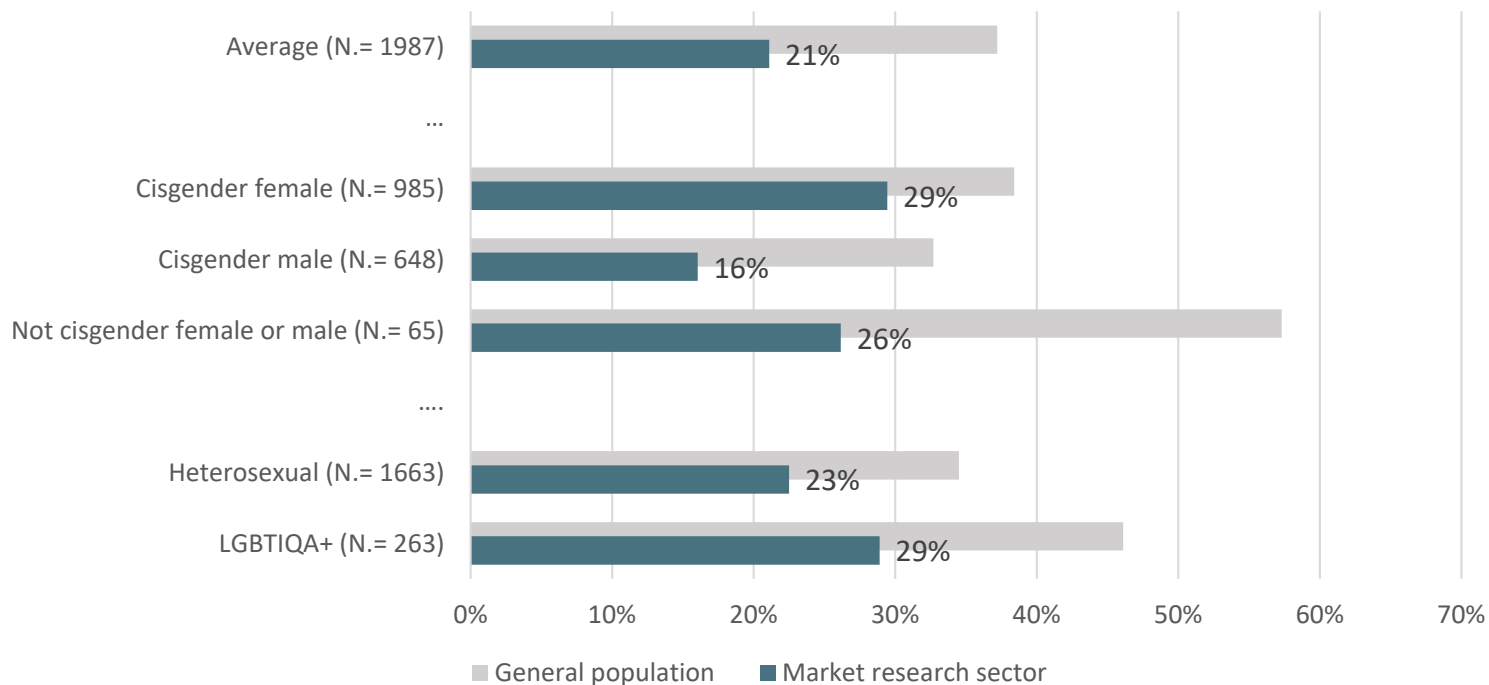
See Appendix for general population sample bases.

LGBTQ+ people are more likely than average to have at least sometimes considered leaving current role or organization due to DEI concerns or discrimination.

CIS gender males, in particular those in the MR sector, are less likely than average to have done so.

% Having at least sometimes considered leaving current role or organization due to DEI concerns or discrimination

– By Gender Identity (excluding AU/PE) / Sexual Orientation (1)



Average across countries surveyed.

Base: All respondents.

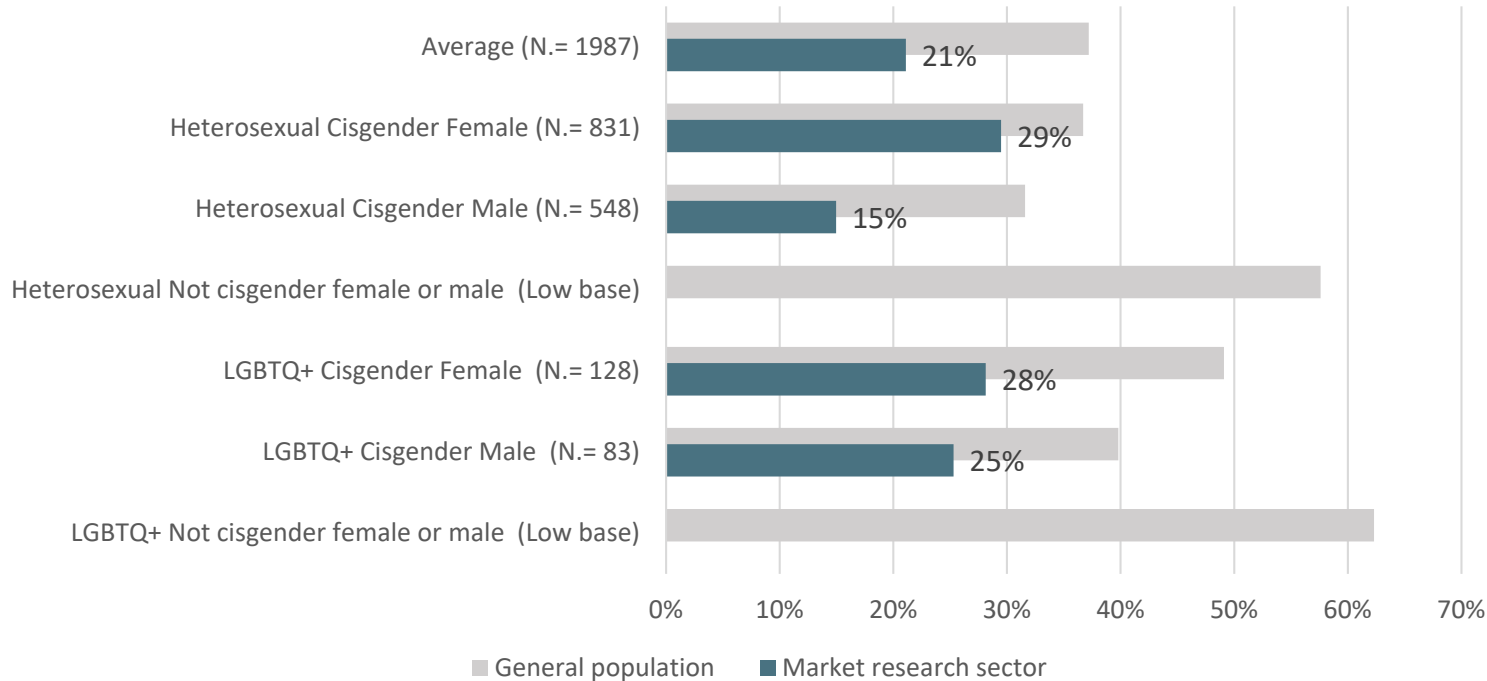
Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

When looking at this issue in the MR sector by gender identity & sexual orientation combined, heterosexual males stand out as being less likely than all the other groups investigated to have at least sometimes considered leaving current role or organization due to DEI concerns or discrimination.

% Having at least sometimes considered leaving current role or organization due to DEI concerns or discrimination

Excluding AU/PE – Gender Identity / Sexual Orientation (2)



Average across countries surveyed.

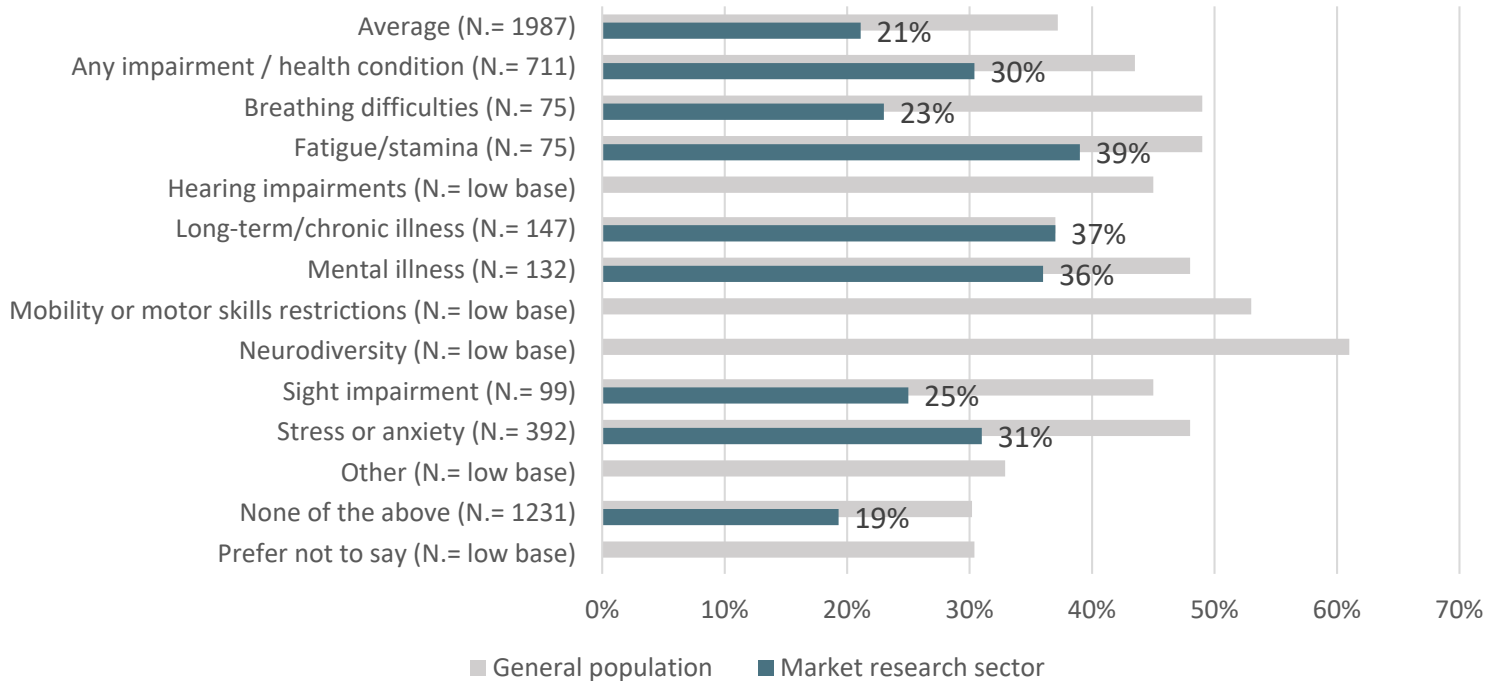
Base: All respondents.

Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

People with impairments or health conditions are more likely than average to have at least sometimes considered leaving current role or organization due to DEI concerns or discrimination. In the MR sector, this is particularly true with respect to people with fatigue/stamina, long-term/chronic illness or mental illness issues.

% Having at least sometimes considered leaving current role or organization due to DEI concerns or discrimination - By Impairments / Health Conditions



Average across countries surveyed.

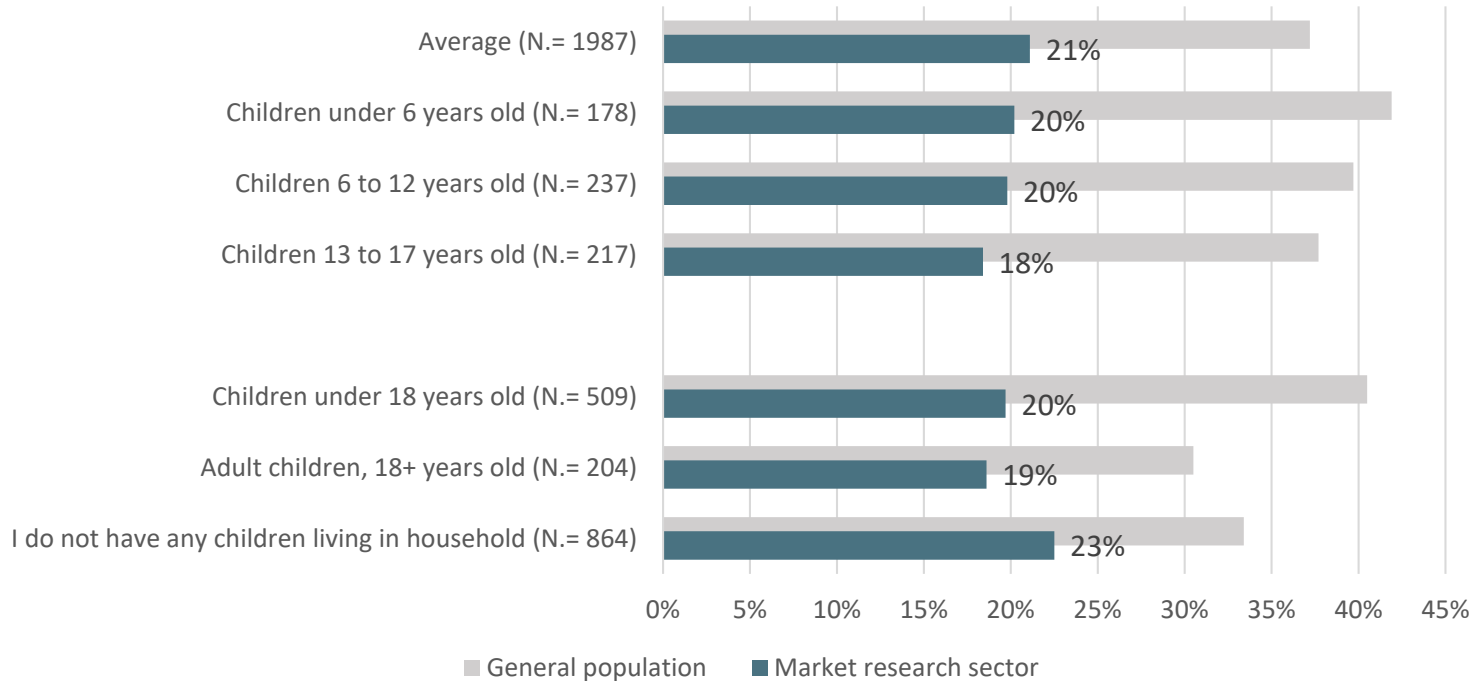
Base: All respondents.

Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

Unlike in the general population, amongst those working in the MR sector, having children at home does not impact the likelihood of someone being more likely than average to have at least sometimes considered leaving current role or organization due to DEI concerns or discrimination.

% Having at least sometimes considered leaving current role or organization due to DEI concerns or discrimination - By Family Status



Average across countries surveyed.

Base all respondents.

Note: Data from the UK for Market research sector is for children aged 16 plus, and is not included in the detailed breakdown by the age of child shown here

Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.



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WORKPLACE
CULTURE



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WORKPLACE
CULTURE
EQUAL
OPPORTUNITIES

WORKPLACE CULTURE EQUAL OPPORTUNITIES



This section of the report looks at the extent to which people believe that everyone in their industry has the same opportunities to progress and is rewarded fairly

The survey asked about this with respect to:

- Age
- Gender
- Sexual Orientation/gender identity
- Ethnicity/race/skin color [Except DE]
- National Origin [Except DE]
- Religion/faith/beliefs
- Family Status/caring responsibilities
- Disability/impairment/health condition
- Social Class [Except JP]

Using the scale:

- Yes
- No
- Prefer not to say
- Don't know

In this section, we deep dive into the data based on those who say 'NO'.

KEY FINDINGS

WORKPLACE CULTURE - EQUAL OPPORTUNITIES

People working in the MR sector are 30% more likely than people in the general population to believe that everyone DOES NOT have equal opportunities/rewards in the industry (30 vs 23%). People in the MR sector in Japan, Norway and Peru are least likely to believe there is inequality in the sector.

With respect to the minority groups covered by the research, people working in the MR sector are most likely to believe that age and disability status negatively impact equal opportunity in the industry, with four-in-ten or more holding this belief.

Approximately one-in-three people working in the MR sector see ethnicity/national origin, family status and/or gender as a reason for inequality in the sector.

Religion and sexual orientation/gender identity the least so. Relative to the general population, age and social class inequality are of particular concern to people working in the MR sector.

Equal Opportunities and Age

Just over one-in-four people working in the MR sector say that **age** negatively impacts equal opportunity/rewards. This opinion is particularly strong in Brazil, Australia and the USA and weakest in Japan, Norway and Peru. The age barrier in the MR sector compared to in the general population is very noticeable in the USA.

In the MR sector, 35 plus year olds are more likely to believe that **age** negatively impacts equal opportunity/rewards in the industry than do 18-34 year olds. The same phenomenon is not discernible in the general population.

Equal Opportunities and Gender

In the MR sector, one-in-three people believe that **gender** negatively impacts equal opportunity/rewards in the industry. This opinion is particularly strong in Brazil and Germany and weakest in Japan, Norway and Brazil. The gender barrier in the MR sector compared to in the general population is most noticeable in Germany.

In the MR sector, it is very noticeable that cisgender females and LGBTQ+ people believe that **gender** negatively impacts equal opportunity/rewards in the industry. Heterosexual cisgender males working in the MR sector are less likely than average to believe that gender negatively impacts equal opportunity/rewards in the industry.

Equal Opportunities and Sexual Orientation / Gender identity

Just under one-in-five people working in the MR sector believe that **sexual orientation / gender identity** negatively impacts equal opportunity/rewards in the industry. This is a particularly strong belief in Brazil and the proportion is also higher than average in the USA. It is clearly least so in Japan.

KEY FINDINGS

In the MR sector, LGBTQ+ people are twice as likely to see **sexual orientation / gender identity** as a barrier to equal opportunity/rewards in the industry than are heterosexuals. This phenomenon is much more noticeable in the MR sector than in the general population. In contrast cisgender in the MR sector does not influence opinion on this issue to the same degree as it does in the general population.

In the MR sector, heterosexual cisgender males are much less likely than average to see **sexual orientation / gender identity** as a barrier to equal opportunity/rewards in the industry.

Equal Opportunities and Ethnicity / National Origin

One-third of people working in the MR sector believe that **ethnicity** negatively impacts equal opportunity/rewards in the industry, even more so in Brazil, the UK, Canada, the US and Australia. It is in the UK where this belief in the MR sector is particularly noticeable when compared to the general population.

Compared to many other factors the amount of cross-country variation is very low when it comes to **national origin** being a barrier to equal opportunity/rewards in the industry. The exception is Japan where it is clearly not seen as a barrier.*

Equal Opportunities and Religion

Only one-in-ten people working in the MR sector believe that **religion** is a barrier to equal opportunity/rewards in the industry (the lowest proportion for any of the factors measured) and it is only in Brazil where a significant proportion of people see religion as such a barrier. Religion is even less of

an issue in this respect in Japan nor Peru.*

Equal Opportunities and Disability Status

Just over one-in-four people working in the MR sector believe that **disability status** negatively impacts equal opportunity/rewards in the industry. This opinion is even more widespread in the MR sector in Brazil and Australia, whilst this belief is less than average in Japan, Norway and Peru.

In the MR sector, one-in-two people with impairments / health conditions see **disability status** as a barrier to equal opportunity/rewards in the industry. This figure rises to six-in-ten amongst those with mental illness. For reference, amongst those with mental illness in general public this belief, held by four-in-ten, is still significant, but much less pronounced.

Equal Opportunities and Family Status

Three-in-ten people working in the MR sector believe that **family status** as a barrier to equal opportunity/rewards. Compared to most of the other factors researched, there is relatively little cross-country variation when it comes to seeing this belief. This belief is, however, stronger than average in Brazil, Australia and the UK. In Australia in particular, the belief is much stronger in the MR sector than in the general population.

* See individual country reports / the special reports on ethnicity/religion for more key findings on these matters.

KEY FINDINGS

In the MR sector, one's own family status does not impact the likelihood to believe that **family status** is a barrier to equal opportunity/rewards in the industry. This differs from the general population, where those with young children are more likely to believe this is so.

In the MR sector, however, if a person has taken parental leave then they are slightly more likely than average to see **family status** as a barrier to equal opportunity/rewards in the industry.

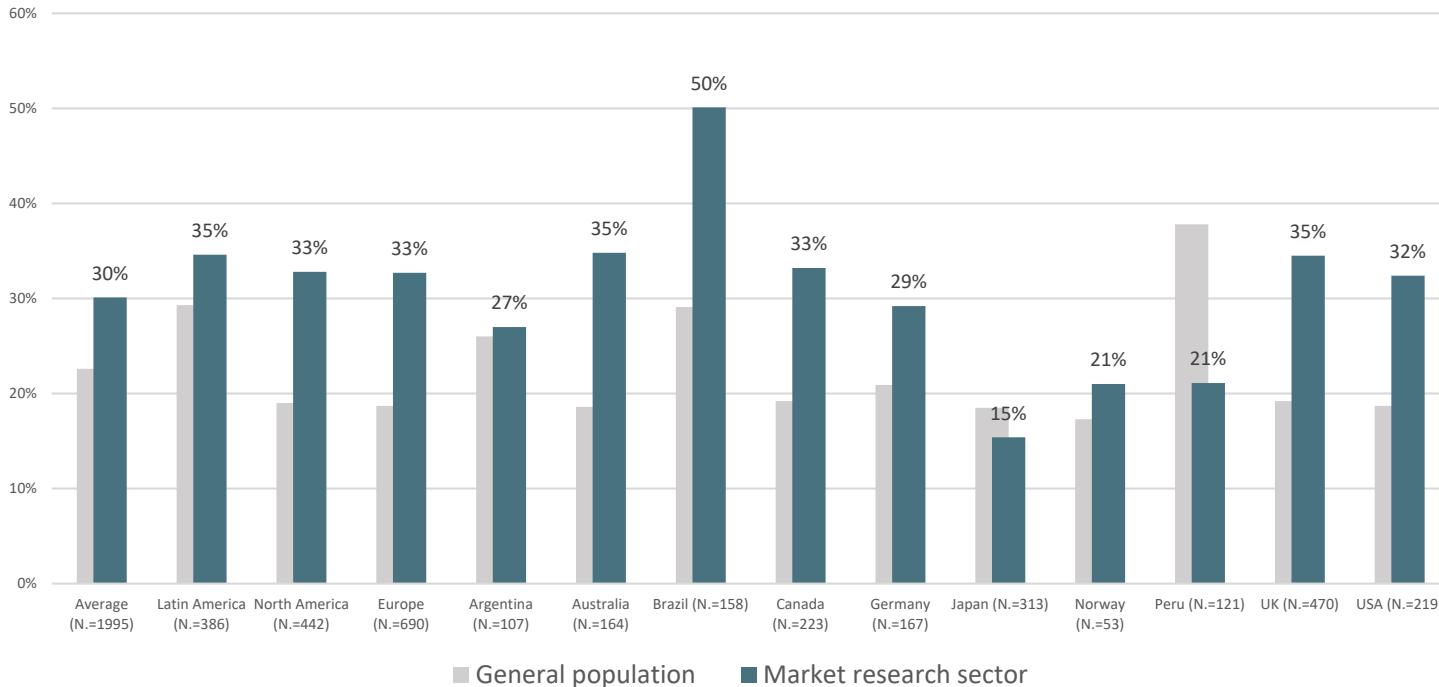
Equal Opportunities and Social Status

More than one-in-three persons (36%) in the MR sector see **social status** as a barrier to equal opportunity/rewards, which is a much higher proportion than amongst the general working population (22%).

Compared to some of the other factors researched, there is relatively little cross-country variation when it comes to seeing social status as a barrier to equal opportunity/rewards. In the MR industry, this belief is, however, stronger than average in Brazil and least strong in Norway. It is, in particular, in Australia where this belief is much stronger in the MR sector than amongst the general public.

People working in the MR sector are 30% more likely to believe (30 vs 23%) to NOT believe everyone has equal opportunities/rewards in the industry than the general working population. People in the MR sector in Japan, Norway and Peru are least likely to believe there is inequality in the sector.

Does everyone have the same opportunities to progress and is rewarded fairly? – Average % saying NO across all factors measured - By Country



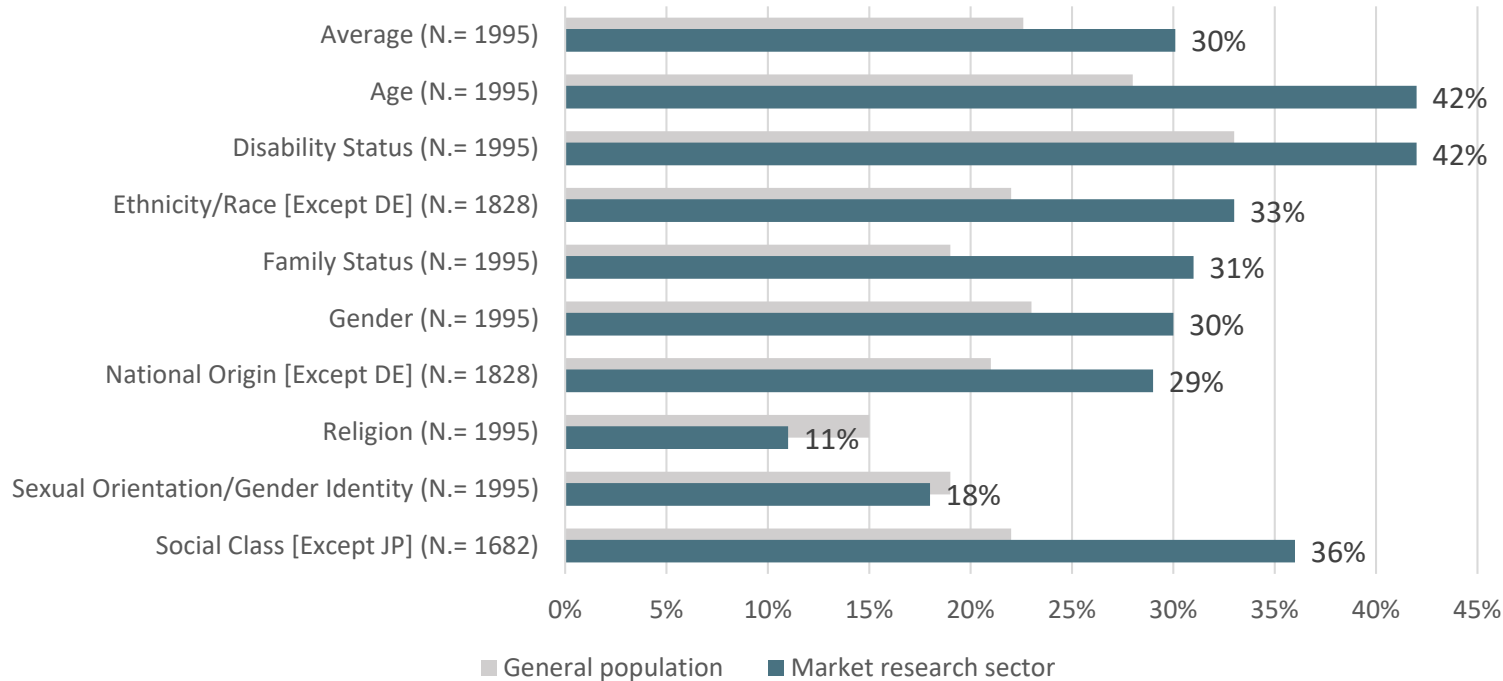
Base: All respondents.

Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

People working in the MR sector are most likely to believe that age and disability status negatively impact equal opportunity in the industry. Relative to the general population, age and social class are of particular concern in this regard in the MR sector. Religion and sexual orientation/gender identity the least so.

Does everyone have the same opportunities to progress and is rewarded fairly? - % saying NO across all factors - By Does NOT believe that everyone has the same opportunities to progress and is rewarded fairly by:



Average across countries surveyed.

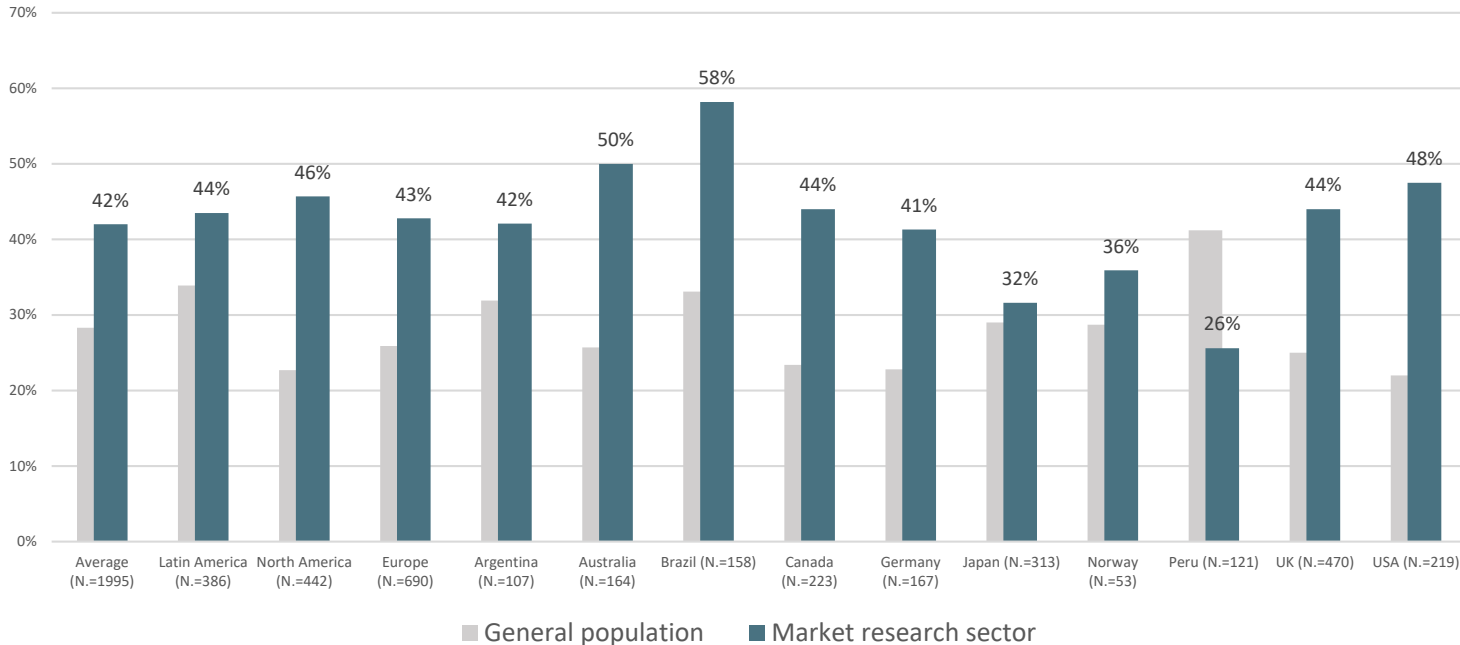
Base: All respondents.

Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

People working in the MR sector in Brazil, Australia and the USA are the most likely to believe that age negatively impacts equal opportunity/rewards in the industry. Least so those working in Japan, Norway and Peru. The age barrier in the MR sector compared to in the general population is very noticeable in the USA.

Does everyone have the same opportunities to progress and is rewarded fairly irrespective of AGE? - % saying NO - By Country



Base: All respondents.

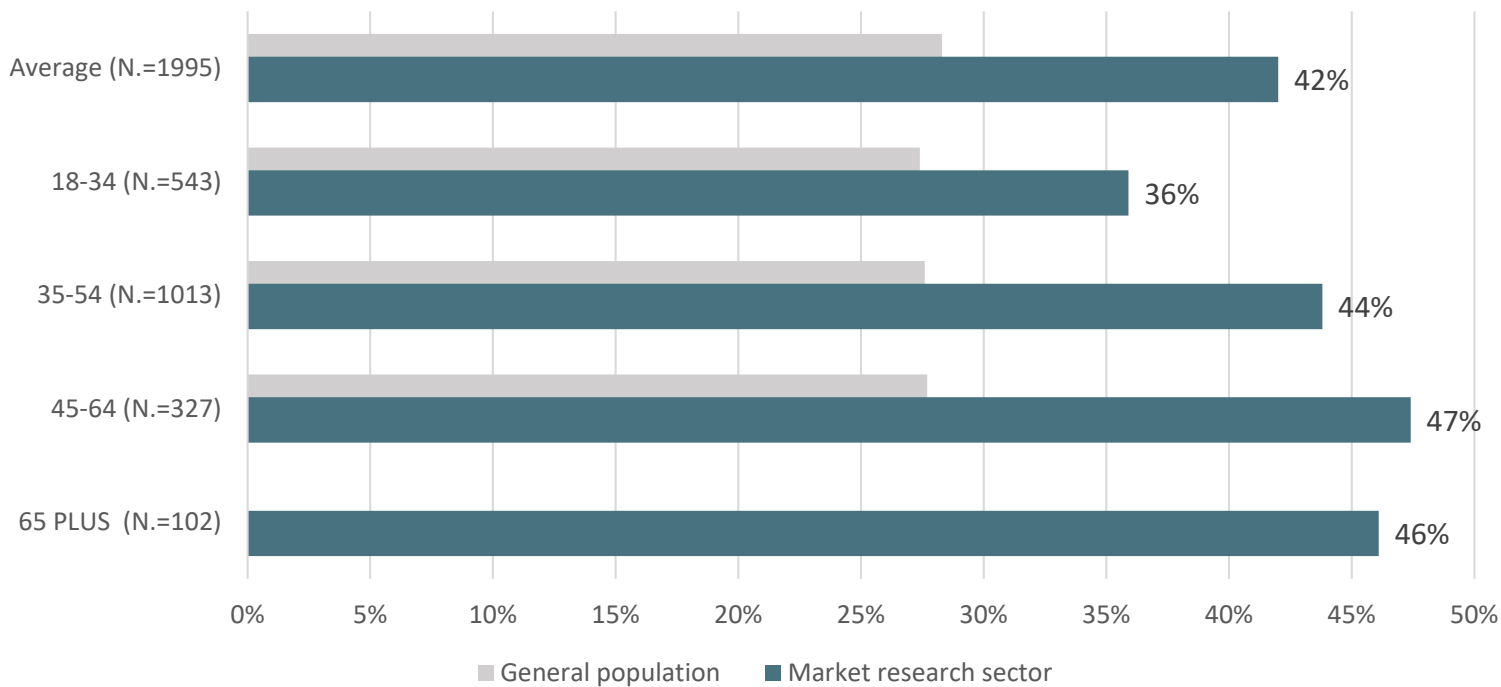
Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

In the MR sector, 35 plus year olds are more likely to believe that age negatively impacts equal opportunity/rewards in the industry than do 18-34 year olds. The same phenomenon is not discernible in the general population.

Does everyone have the same opportunities to progress and is rewarded fairly irrespective of AGE? - % saying NO

– By Age Group



Average across countries surveyed.

Base all respondents.

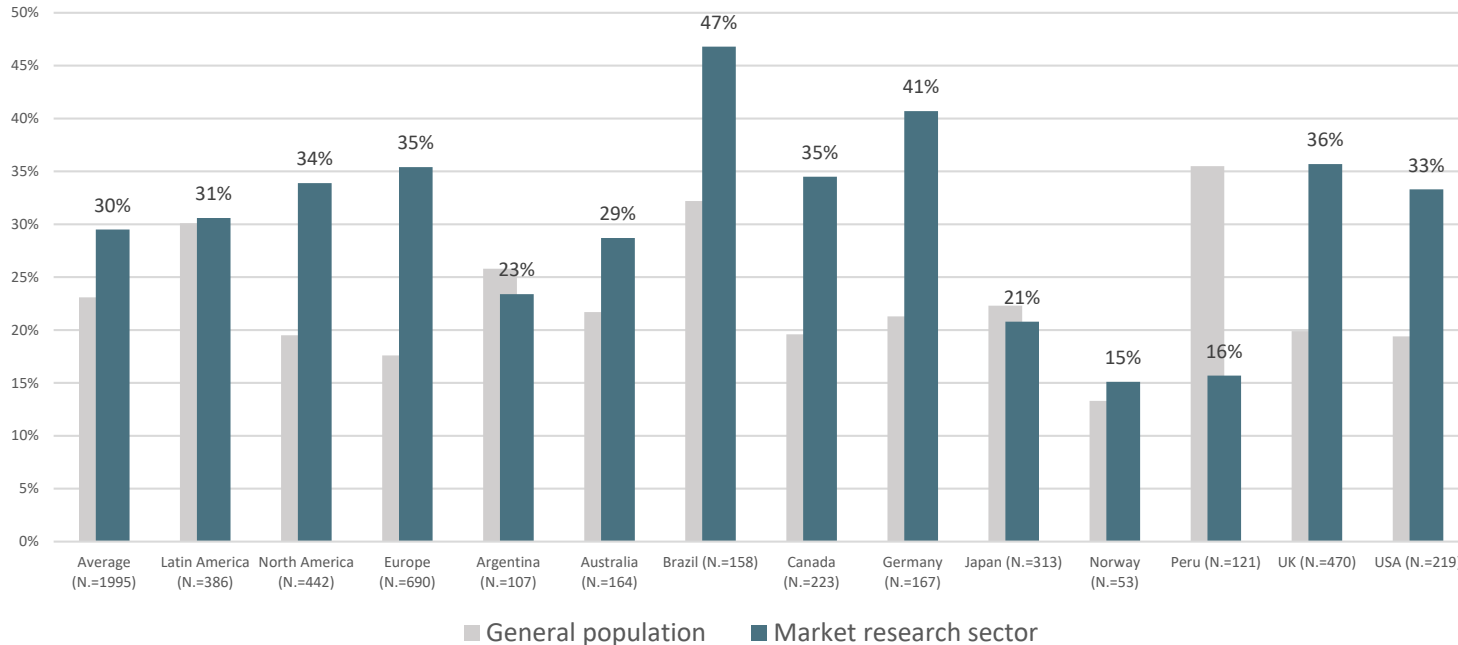
Note: Market research sector in UK is based on 16+. All data in Japan is based on 20+.

Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

People working in the MR sector in Brazil and Germany are the most likely to believe that gender negatively impacts equal opportunity/rewards in the industry. Least so people working in Japan, Norway and Brazil. The gender barrier in the MR sector compared to in the general population is most noticeable in Germany.

Does everyone have the same opportunities to progress and is rewarded fairly irrespective of GENDER? - % saying NO - By Country



Base: All respondents.

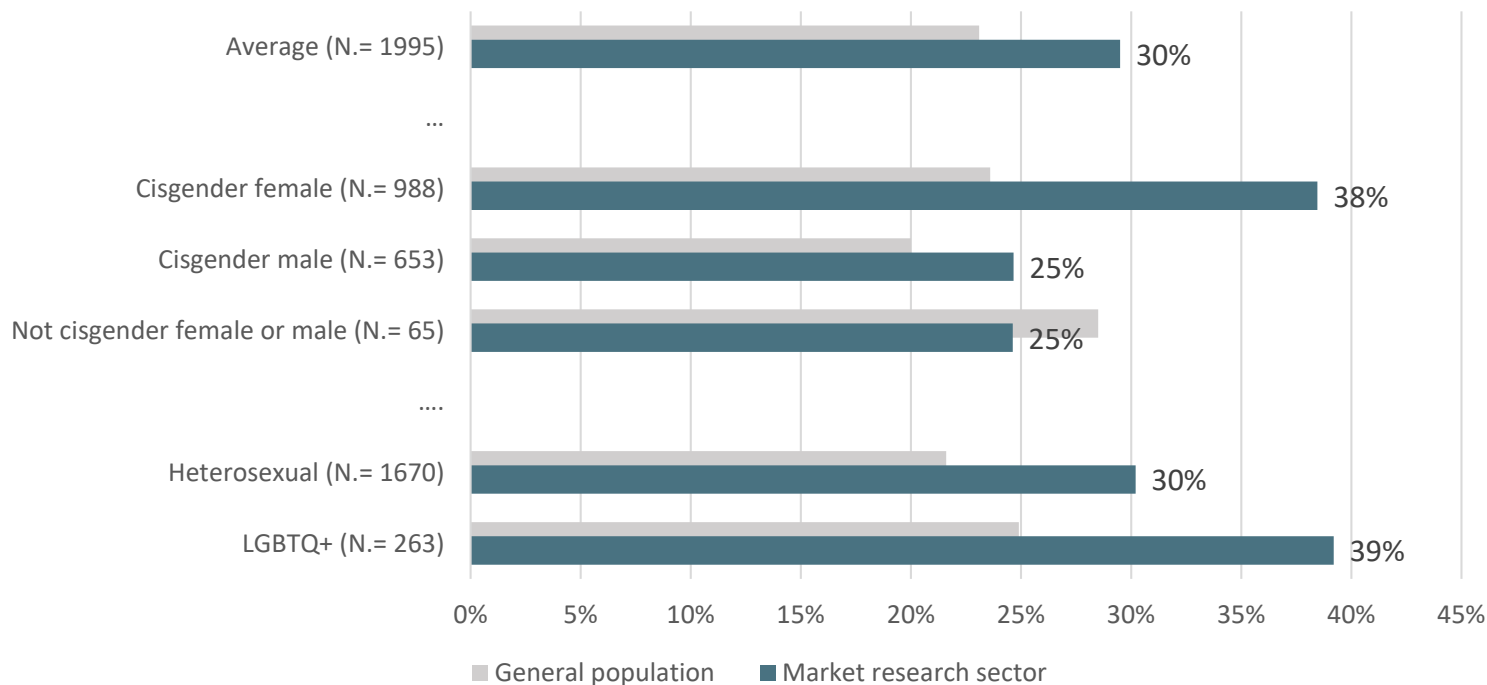
Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

In the MR sector, it is very noticeable that cisgender females and LGBTQ+ people believe that gender negatively impacts equal opportunity/rewards in the industry.

Does everyone have the same opportunities to progress and is rewarded fairly irrespective of GENDER? - % saying NO

- By Gender Identity / Sexual Orientation (1)



Average across countries surveyed.

Base: All respondents.

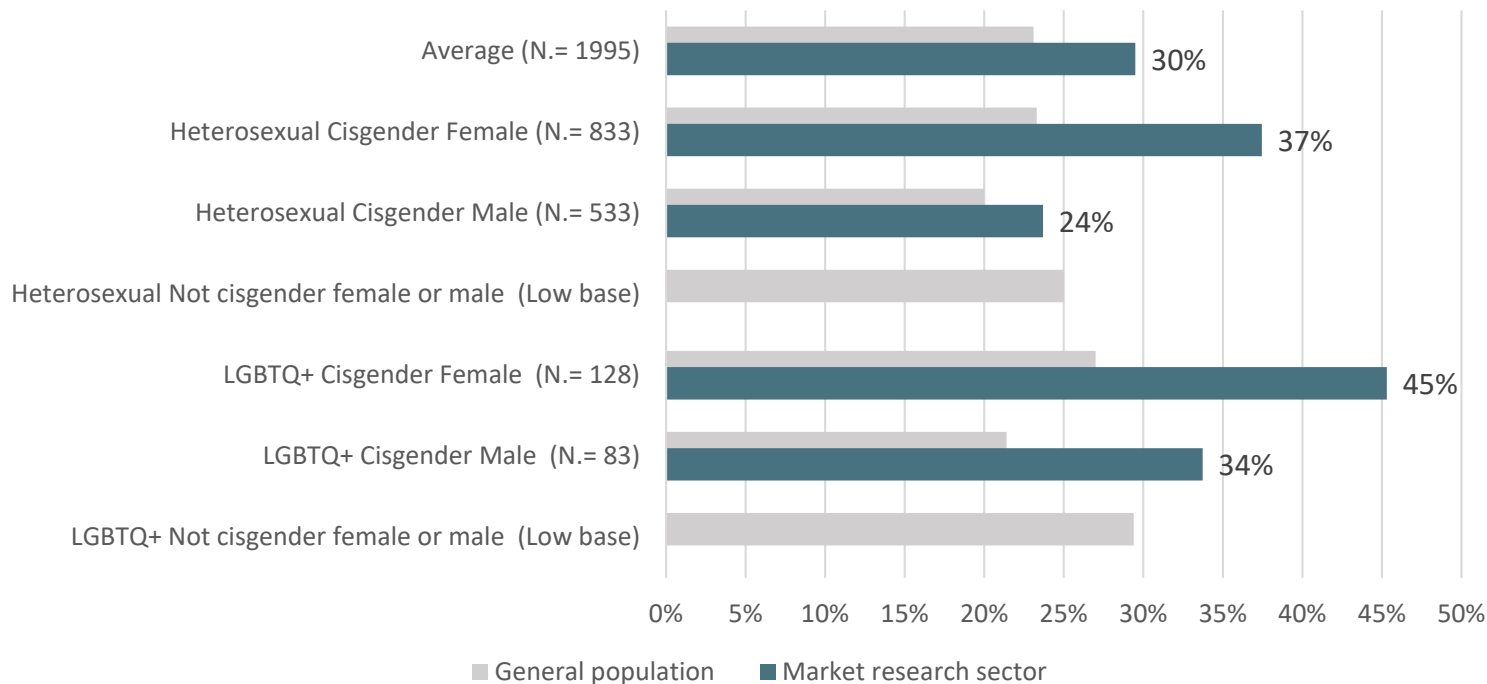
Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

In the MR sector, LGBTQ+ cisgender females are most likely than average to believe that gender negatively impacts equal opportunity/rewards in the industry. This phenomenon is much more pronounced in the MR sector than amongst the general working population. Heterosexual cisgender males working in the MR sector are less likely than average to believe that gender negatively impacts equal opportunity/rewards in the industry.

Does everyone have the same opportunities to progress and is rewarded fairly irrespective of GENDER? - % saying NO

- Gender Identity / Sexual Orientation (2)



Average across countries surveyed.

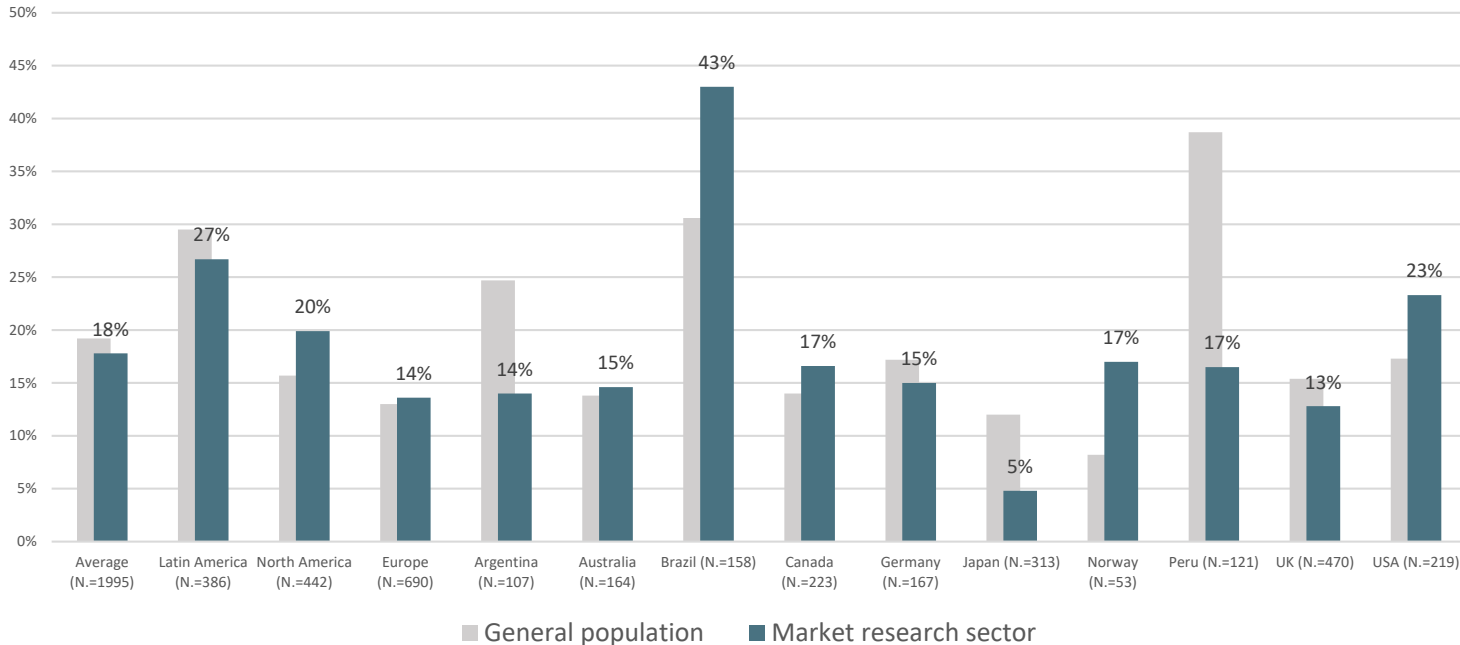
Base: All respondents.

Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

People working in the MR sector in Brazil are the most likely to believe that sexual orientation / gender identity negatively impacts equal opportunity/rewards in the industry, and the proportion is also higher than average in the USA. It is clearly least so in Japan.

Does everyone have the same opportunities to progress and is rewarded fairly irrespective of SEXUAL ORIENTATION/GENDER IDENTITY? - % saying NO - By Country



Base: All respondents.

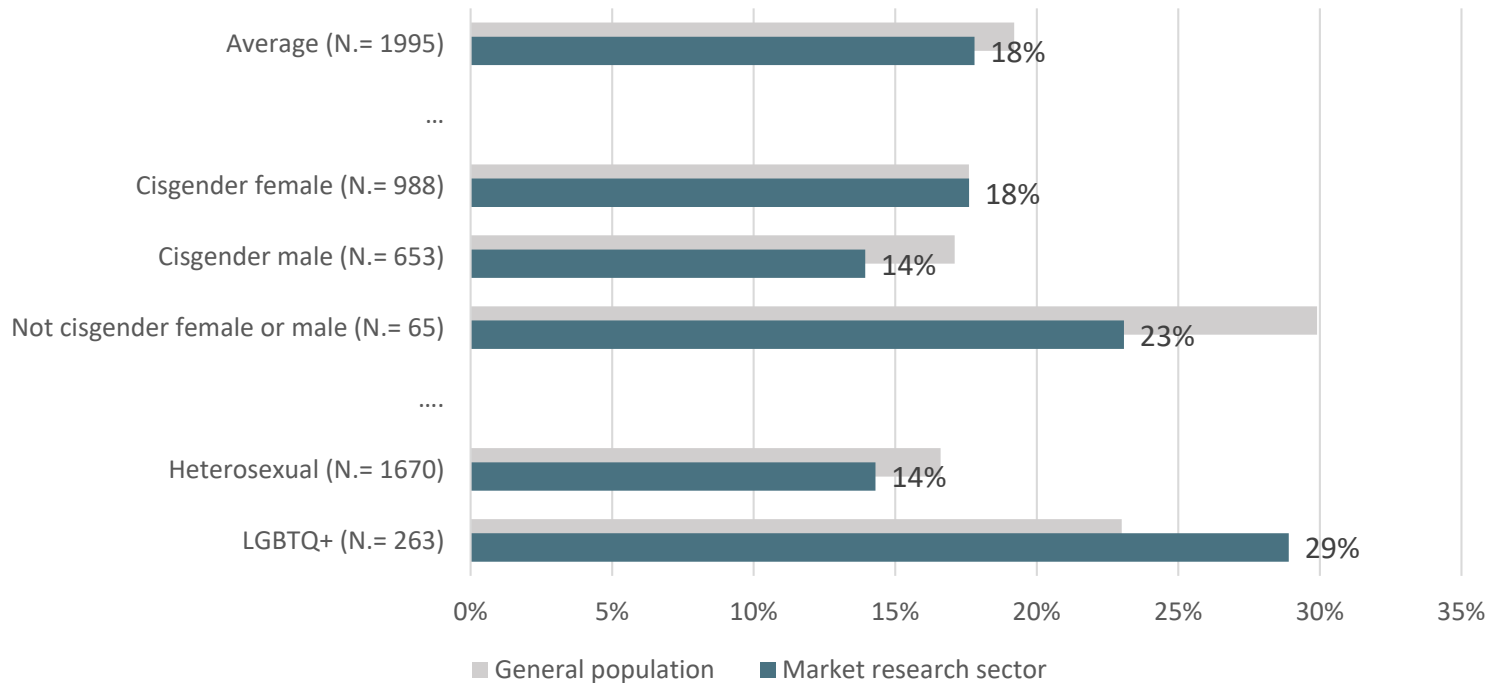
Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

In the MR sector, LGBTQ+ people are twice as likely to see sexual orientation / gender identity as a barrier to equal opportunity/rewards in the industry than are heterosexuals. This phenomenon is much more noticeable in the MR sector than in the general population. In contrast cisgender in the MR sector does not influence opinion on this issue to the same degree as it does in the general population.

Does everyone have the same opportunities to progress and is rewarded fairly irrespective of SEXUAL ORIENTATION / GENDER IDENTITY? - % saying NO

– By Gender Identity (excluding AU/PE) / Sexual Orientation (1)



Average across countries surveyed.

Base: All respondents.

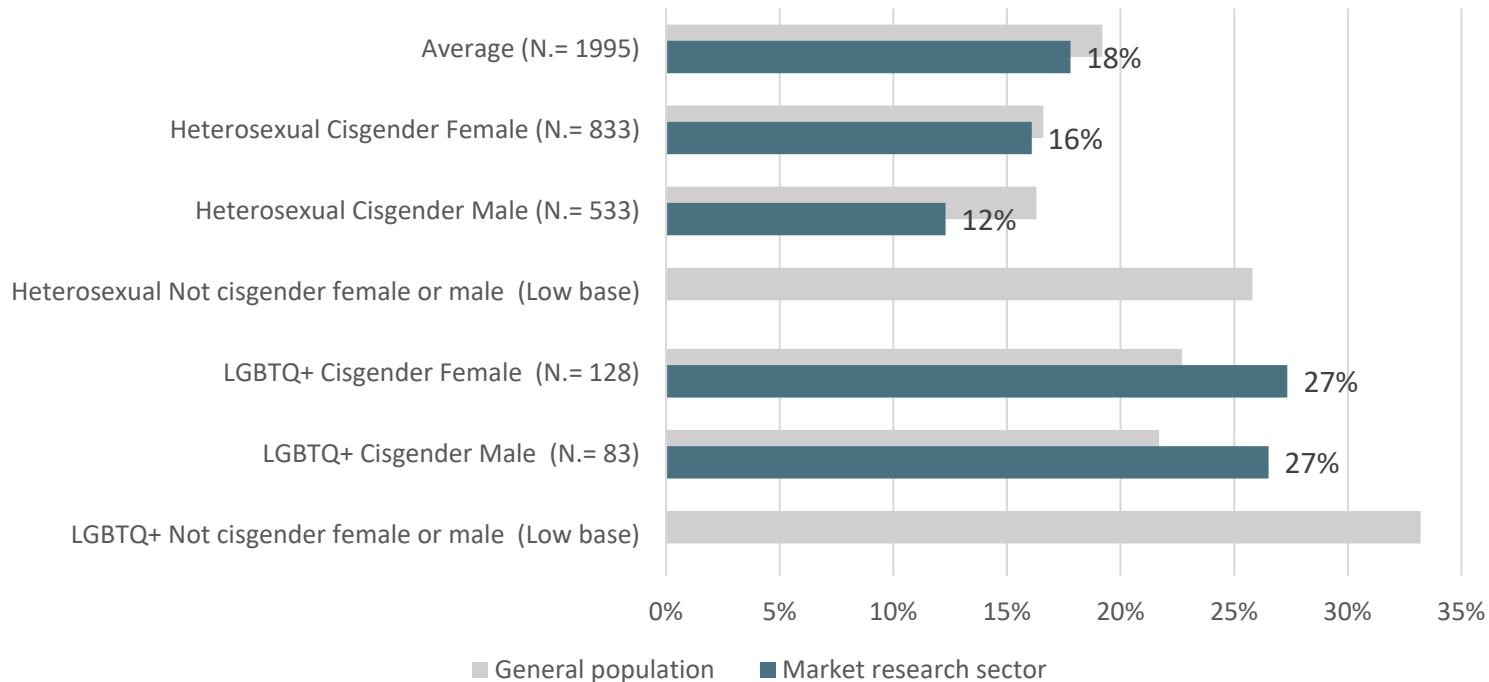
Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

In the MR sector, heterosexual cisgender males are much less likely than average to see sexual orientation / gender identity as a barrier to equal opportunity/rewards in the industry.

Does everyone have the same opportunities to progress and is rewarded fairly irrespective of SEXUAL ORIENTATION / GENDER IDENTITY? - % saying NO

– (excluding AU/PE) - Gender Identity / Sexual Orientation (2)



Average across countries surveyed.

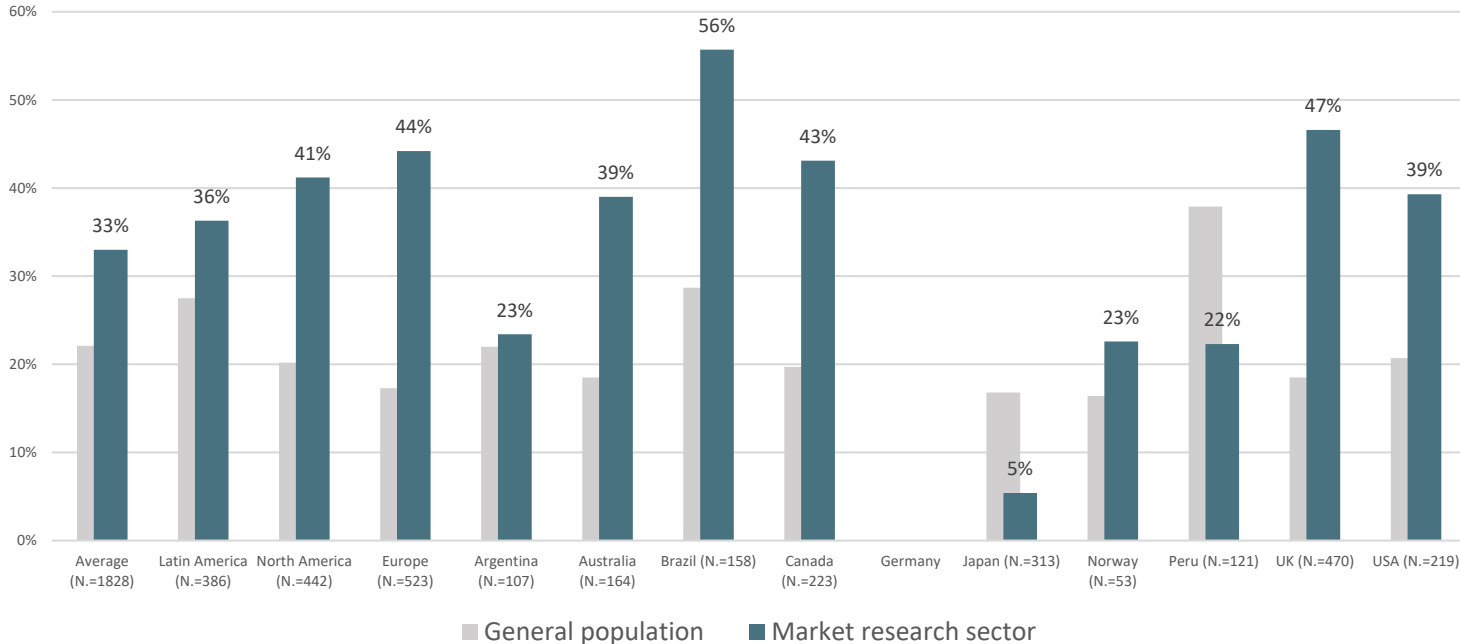
Base: All respondents

.Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

People working in the MR sector in Brazil, the UK, Canada, the US and Australia are the more likely to believe that ethnicity negatively impacts equal opportunity/rewards in the industry than do people in Argentina, Japan, Norway or Peru. It is in the UK where this phenomenon in the MR sector is particularly noticeable compared to the general population.

Does everyone have the same opportunities to progress and is rewarded fairly irrespective of ETHNICITY? - % saying NO - By Country (excluding Germany)



Base: All respondents.

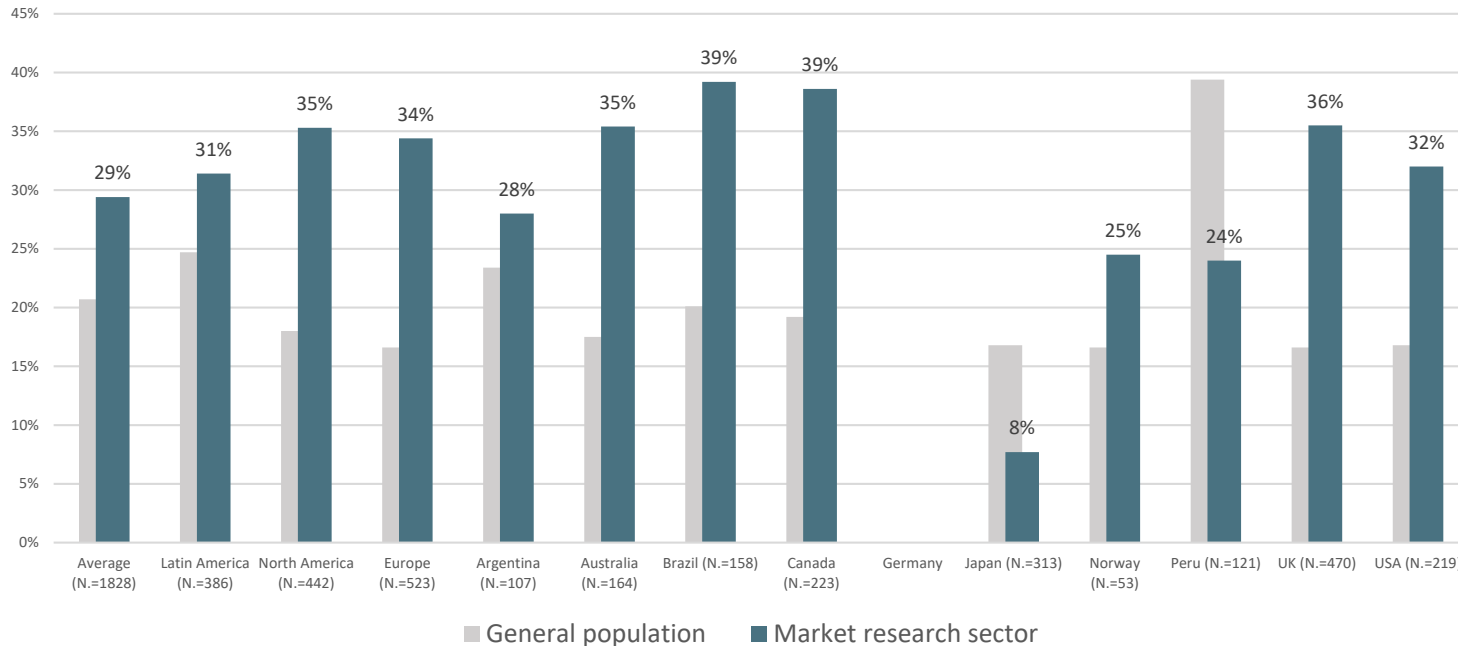
Ethnicity not asked in Germany.

Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

Compared to many other factors the amount of cross-country variation is very low when it comes to national origin as being a barrier to equal opportunity/rewards in the industry. The exception is Japan where it is clearly not seen as a barrier.

Does everyone have the same opportunities to progress and is rewarded fairly irrespective of NATIONAL ORIGIN? - % saying NO - By Country (excluding Germany)



Base: All respondents.

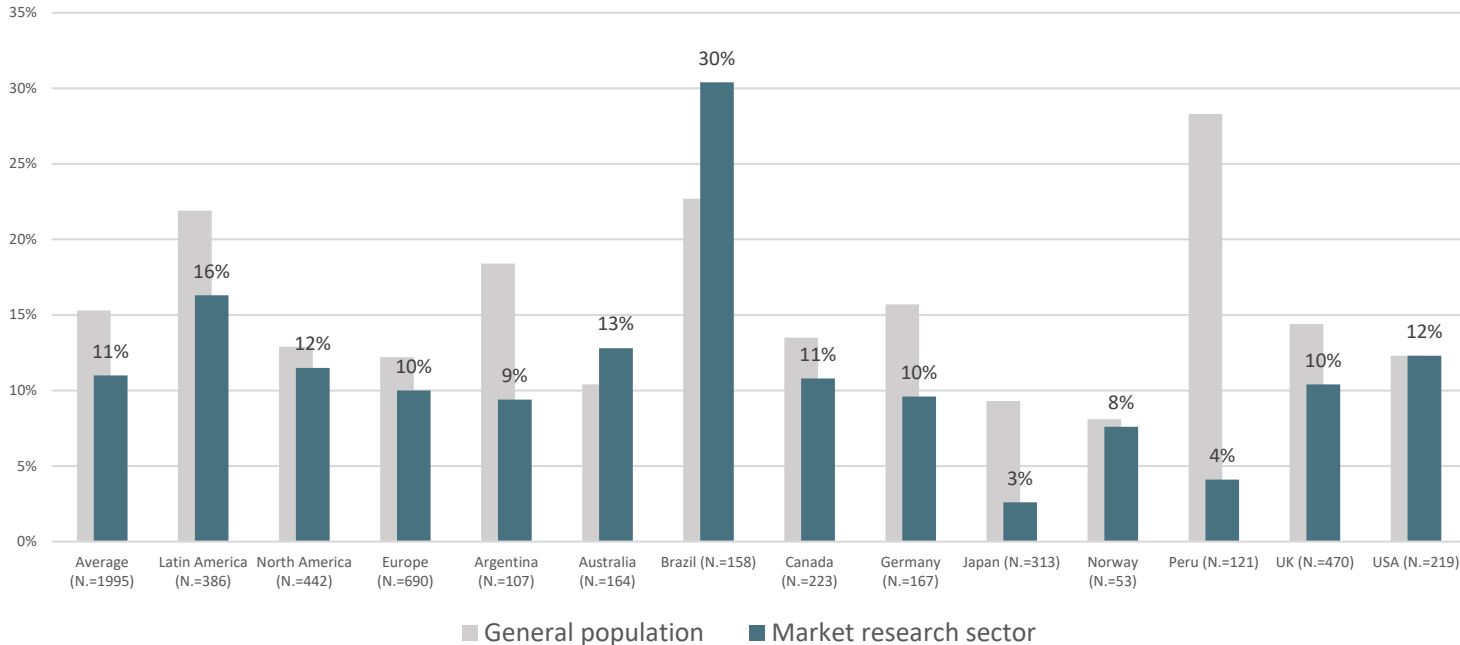
National origin is not asked in Germany.

Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

In the MR sector, it is only in Brazil that a significant proportion of people see religion as a barrier to equal opportunity/rewards in the industry. Religion is not seen as a particular issue in this respect in Japan nor Peru. In Peru, the MR sector differs significantly from the general population in this regard.

Does everyone have the same opportunities to progress and is rewarded fairly irrespective of RELIGION? - % saying NO - By Country



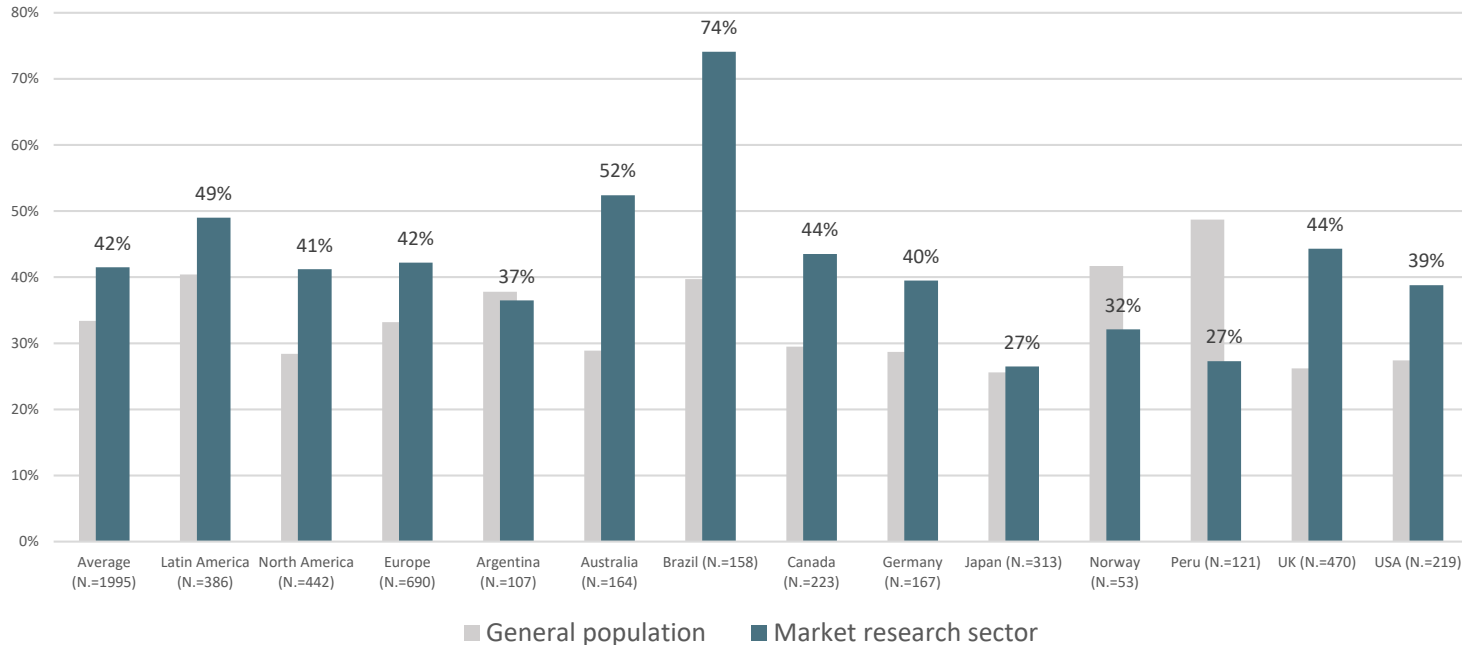
Base: All respondents

.Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

People working in the MR sector in Brazil, as well as in Australia, are more likely than average to believe that disability status negatively impacts equal opportunity/rewards in the industry. This belief is less than average in Japan, Norway and Peru.

Does everyone have the same opportunities to progress and is rewarded fairly irrespective of DISABILITY STATUS? - % saying NO - By Country



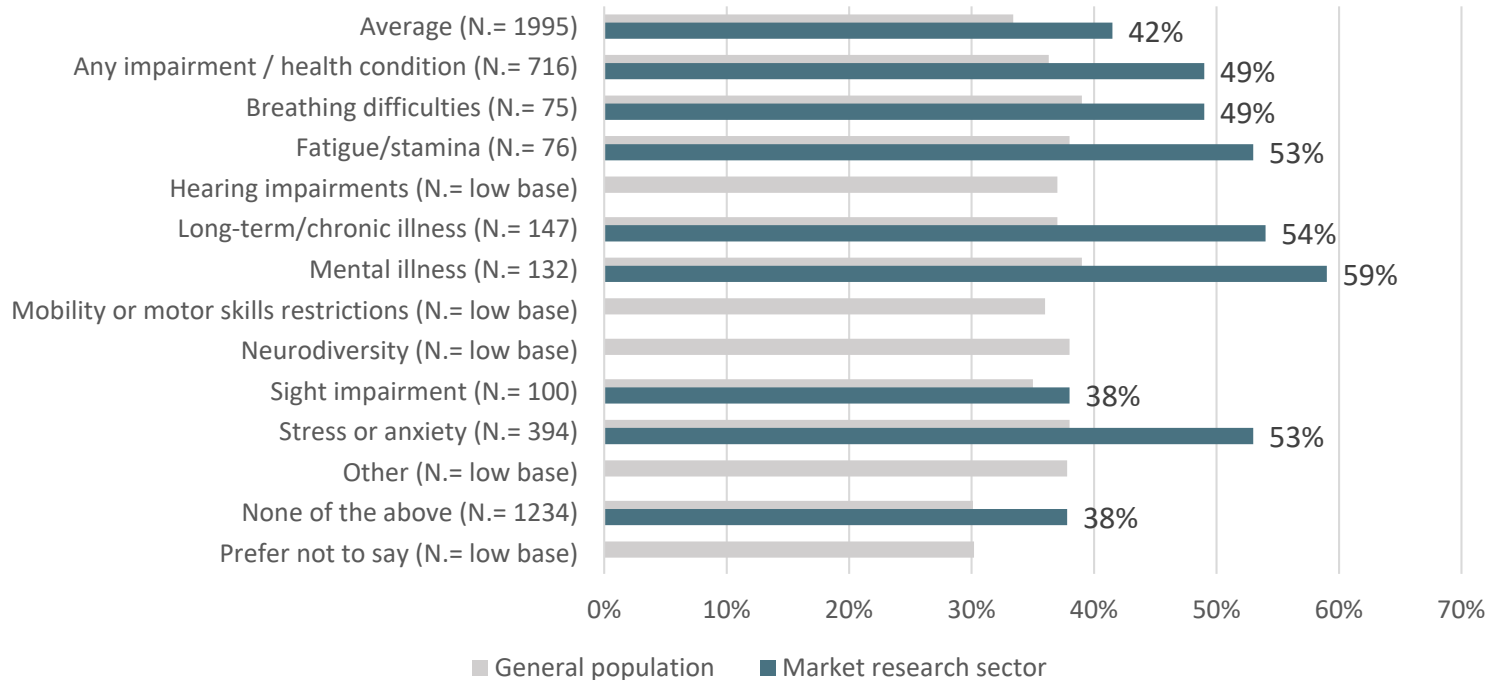
Base: All respondents.

Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

In the MR sector, one-in-two people with impairments / health conditions see disability status as a barrier to equal opportunity/rewards in the industry. This figure rises to six-in-ten amongst those with mental illness.

Does everyone have the same opportunities to progress and is rewarded fairly irrespective of DISABILITY STATUS? - % saying NO - By Impairments / Health Conditions



Average across countries surveyed.

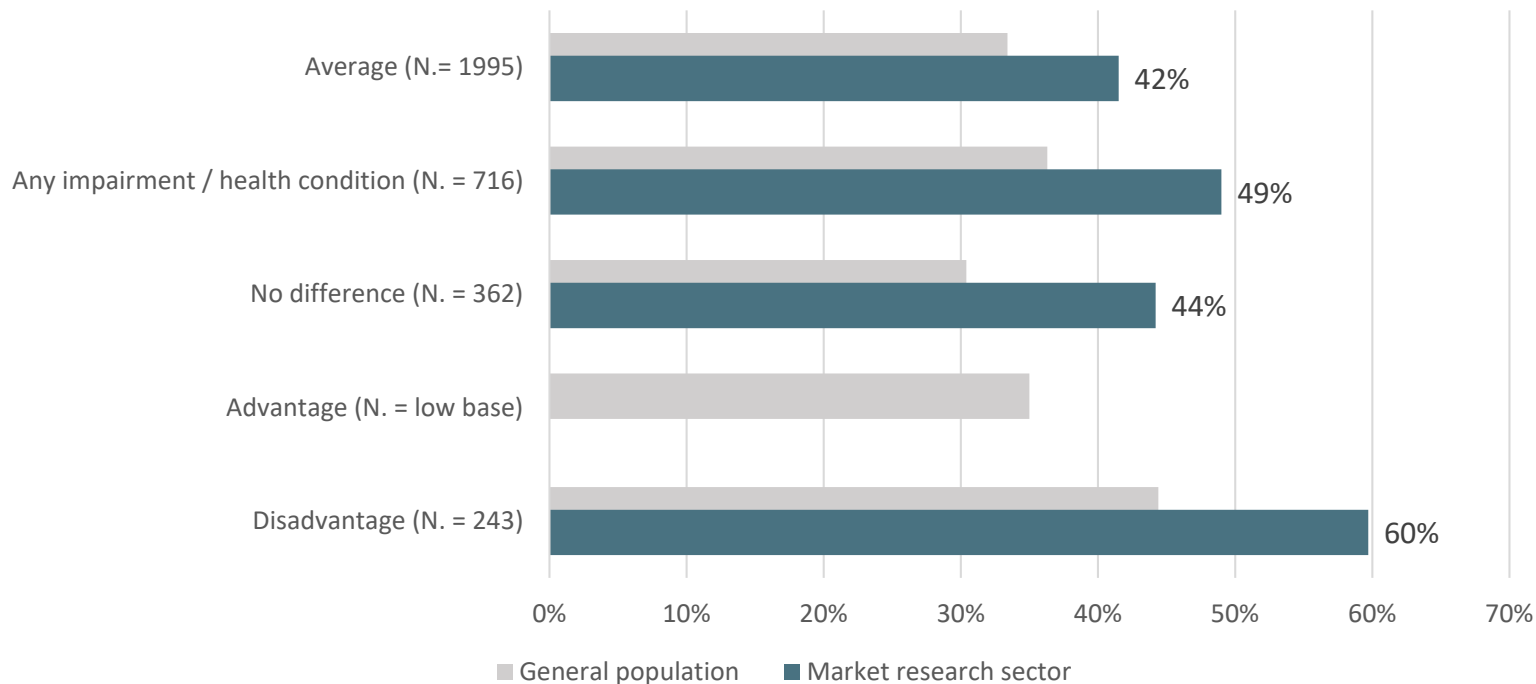
Base: All respondents.

Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

In the MR sector, six-in-ten people with impairments / health conditions, and who feel that they are at a career progression disadvantage because of their impairments/health conditions, see disability status as a barrier to equal opportunity/rewards in the industry.

Does everyone have the same opportunities to progress and is rewarded fairly irrespective of DISABILITY STATUS? - % saying NO - By Impairments / Health Conditions



Average across countries surveyed.

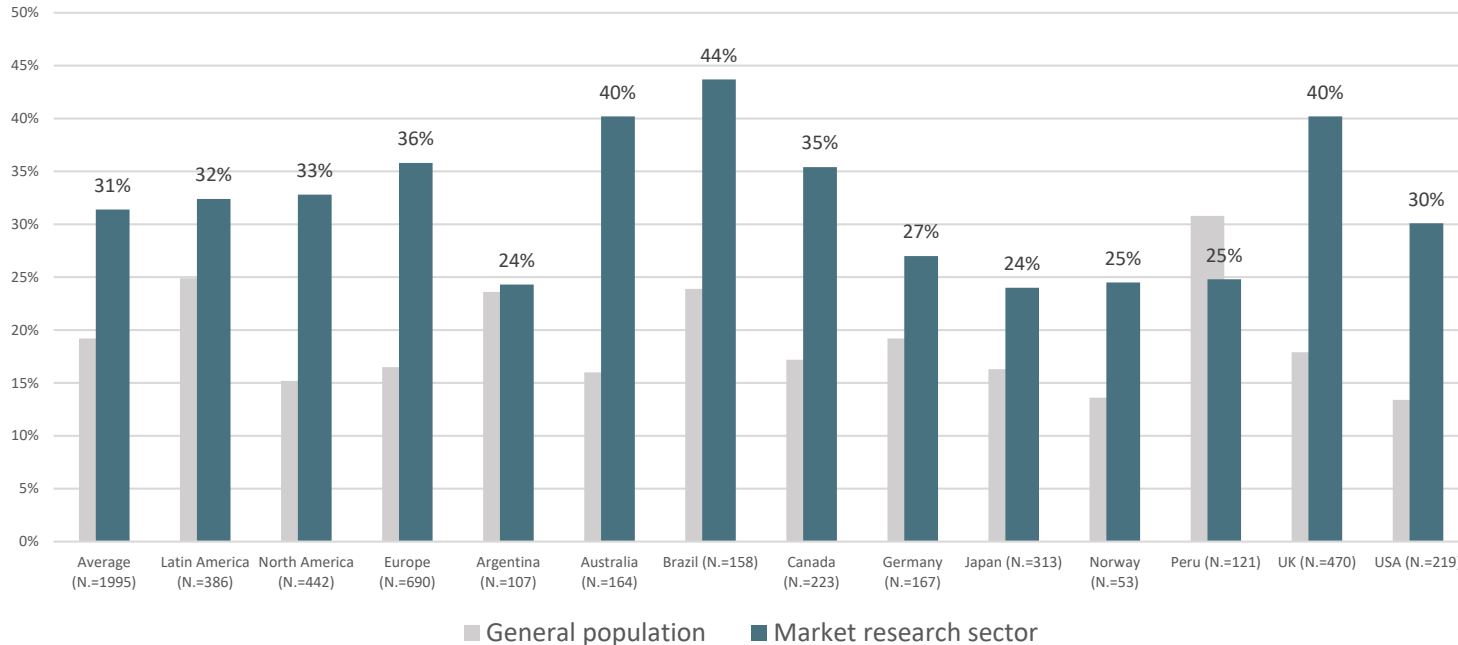
Base: All respondents.

Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

Compared to the other factors researched, there is relatively little cross-country variation when it comes to seeing family status as a barrier to equal opportunity/rewards. This belief is, however, stronger than average in Brazil, Australia and the UK. In Australia in particular, the belief is much stronger in the MR sector than in the general population.

Does everyone have the same opportunities to progress and is rewarded fairly irrespective of FAMILY STATUS? - % saying NO - By Country



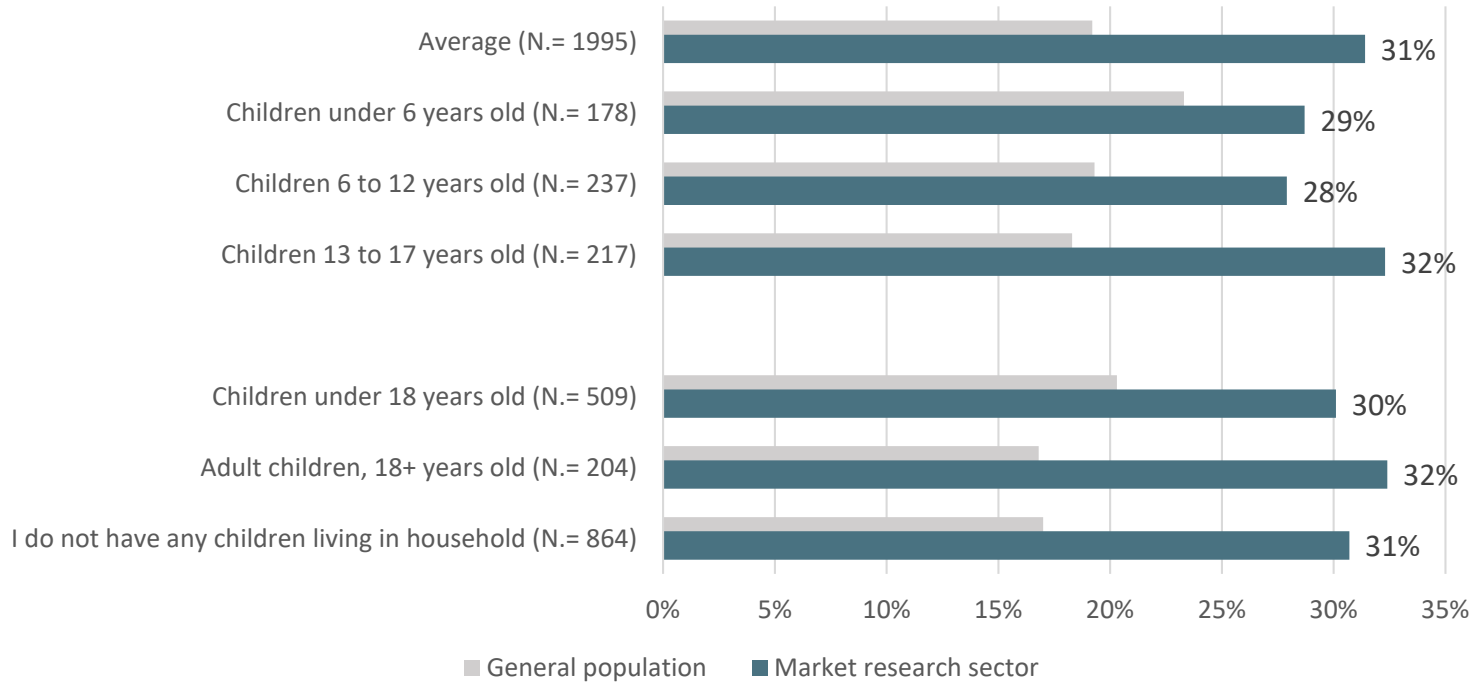
Base: All respondents.

Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

In the MR sector, one's own family status does not impact the likelihood to believe that family status is a barrier to equal opportunity/rewards in the industry. This differs from the general population, where those with young children are more likely to believe this is so.

Does everyone have the same opportunities to progress and is rewarded fairly irrespective of FAMILY STATUS? - % saying NO - By Family Status



Average across countries surveyed.

Base all respondents.

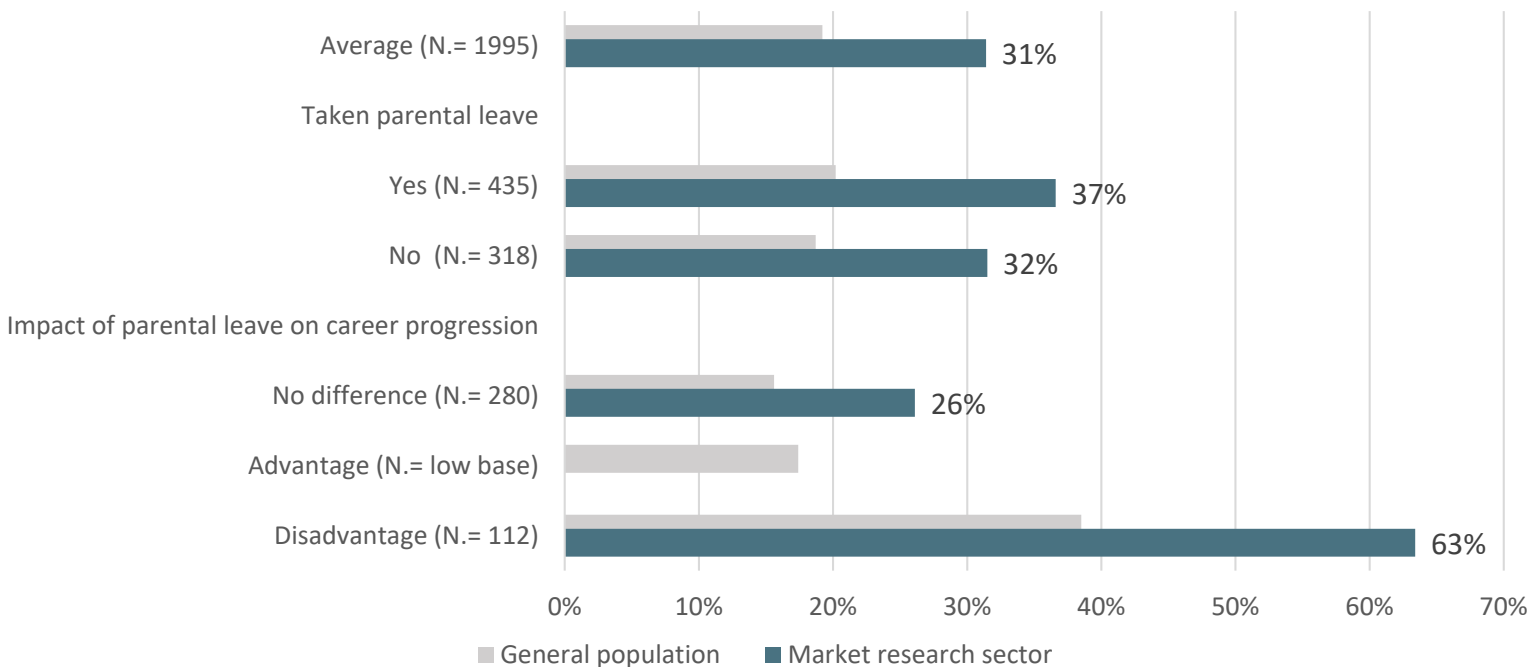
Note: Data from the UK for Market research sector is for children aged 16 plus, and is not included in the detailed breakdown by the age of child shown here

Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

In the MR sector, if a person has taken parental leave they are slightly more likely than average to see family status as a barrier to equal opportunity/rewards in the industry. Naturally, this opinion is much more widespread amongst those who feel they have been disadvantaged by taking parental leave.

Does everyone have the same opportunities to progress and is rewarded fairly irrespective of FAMILY STATUS? - % saying NO - By Parental Leave



Average across countries surveyed.

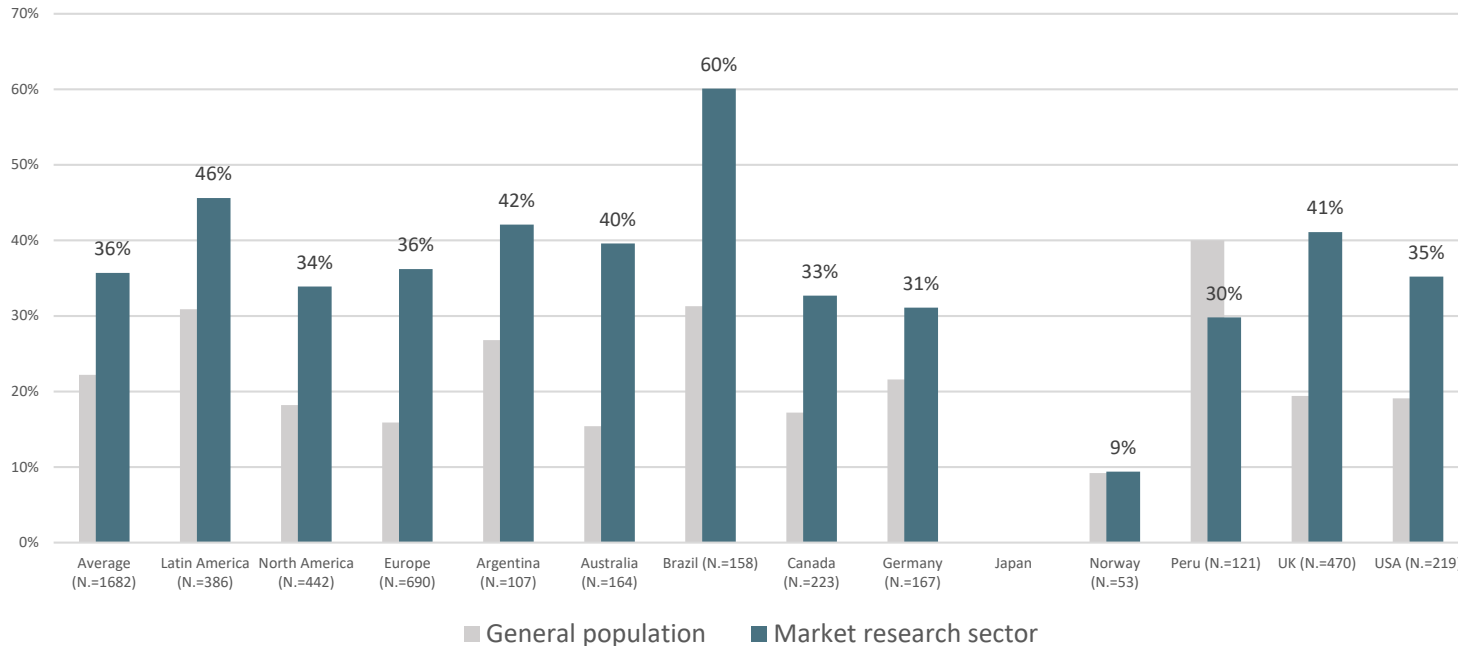
Base: All respondents.

Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

Compared to some of the other factors there is relatively little cross-country variation when it comes to seeing social status as a barrier to equal opportunity/rewards. In the MR industry, this belief is strongest in Brazil and least strong in Norway. In Australia in particular, the MR sector differs significantly from the general population in this regard.

Does everyone have the same opportunities to progress and is rewarded fairly irrespective of SOCIAL STATUS? - % saying NO - By Country (excluding Japan)



Base: All respondents.

Social status is not asked in Japan.

Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.



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WORKPLACE CULTURE
ATTITUDES TOWARDS
DIVERSITY, INCLUSIVITY AND
EQUALITY IN THE
WORKPLACE

WORKPLACE CULTURE

ATTITUDES TOWARDS DIVERSITY, INCLUSIVITY AND EQUALITY IN THE WORKPLACE



This part of the report looks at people's attitudes towards the DEI culture at the place they work.

The data is based upon responses to 20 attitude statements, from which five factors have been created in order to sharpen the analysis.

The question was asked using a 5-point scale from strongly agree to strongly disagree. This section of the report looks at the data based on those who either disagree or strongly disagree with each statement.

Only 8 of the 20 attitude statements were asked in the UK Market Research Sector Survey conducted in 2020, so data feeding into three of the five factors excludes data from people working in the MR sector in the UK. This is marked on the charts in question.

In this section, we also deep dive in attitudes towards the concerted efforts of the organization where they work on DEI related matters.

WORKPLACE CULTURE - ATTITUDES TOWARDS DIVERSITY, INCLUSIVITY AND EQUALITY IN THE WORKPLACE

Overall the opinions of people working in the MR sector are similar to those of the general working population when it comes to workplace DEI culture, but there are significant differences to be found when digging a bit deeper.

Compared to people in the general population, those working in the MR sector are less negative about opportunities and being valued in general in their workplace but are clearly more negative on the diversity of the employee base where they work. In particular, they disagree that their organization has a diverse leadership team (41% in the MR sector disagree compared to 24% amongst the general working population).

It is especially in Germany and Norway, where people working in the MR sector disagree that the company where they work has a diverse employee base, and it is in Germany where the difference compared to the general working population is most marked.

Those working in the MR sector in Brazil and Japan are most likely to think negatively about their workplace when it comes to opportunity and recognition, as well as fairness to all employees.

The feeling of not belonging / not being valued is strongest in Japan,

both within the MR sector as well as in the general population more broadly.

People working in the MR sector in Brazil are most likely to disagree that their company makes concerted efforts related to DEI culture. The difference compared to the general population is marked.

Opinions on the concerted efforts of their organization on DEI matters

One-in-five people working in the MR sector disagree that their organization is making concerted efforts on DEI matters.

LGBTQ+ people working in the MR sector are more negative about the concerted efforts of their organization on DEI matters than their heterosexual colleagues. This phenomenon is more pronounced in the MR sector than in the general population.

Digging deeper, heterosexual cisgender females working in the MR sector are somewhat more negative about the concerted efforts of their organization on DEI matters than their male heterosexual colleagues.

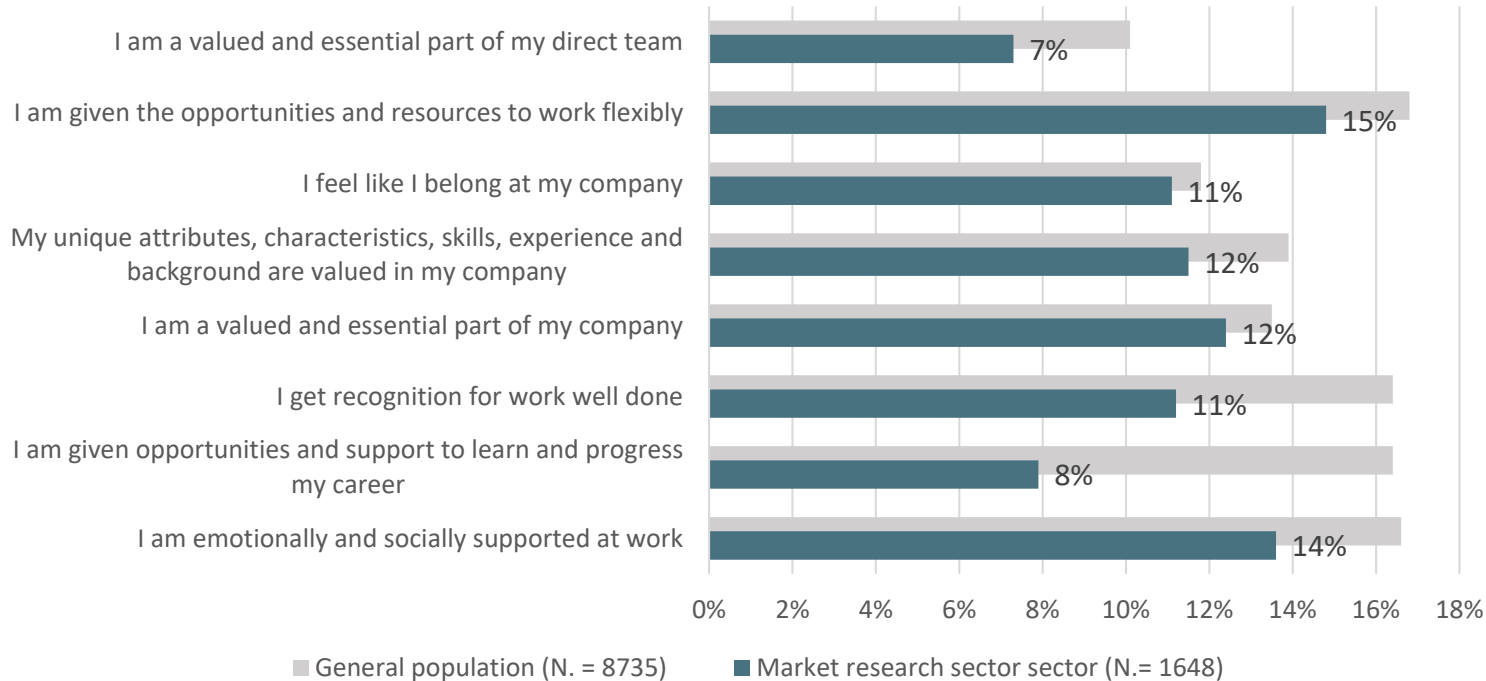
When looking at the impact of impairments / health conditions, it is people with mental illness working in the MR sector who are most negative about the concerted efforts of their organization on DEI matters (three-in-ten vs four-in-ten on average). This phenomenon is not noticeable amongst the general public.

Compared to people in the general population, those working in the MR sector are less negative about their opportunities to learn and progress

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Does not believe that the company they work for has a positive culture - % saying DISAGREE (bottom 2 box on a 5-point scale) - By statement (1)



Base: Those who have more than 1 employee working in their company or are not self-employed.

Average across countries.

Compared to people in the general population, those working in the MR sector more likely to disagree that their leadership team is diverse and also more likely to disagree that their organization has a formal DEI program.

Does not believe that the company they work for has a positive DEI culture - % saying DISAGREE (bottom 2 box on a 5-point scale) - By statement (2)



Base: Those who have more than 1 employee working in their company or are not self-employed.

* Excludes UK data for the MR sector

Average across countries.

Compared to people in the general population, those working in the MR sector are marginally more critical about the place they work when it comes to cultural diversity and how it is valued.

Does not believe that the company they work for has a positive DEI culture - % saying DISAGREE (bottom 2 box on a 5-point scale) - By statement (3)



Base: Those who have more than 1 employee working in their company or are not self-employed.

* Excludes UK data for the MR sector

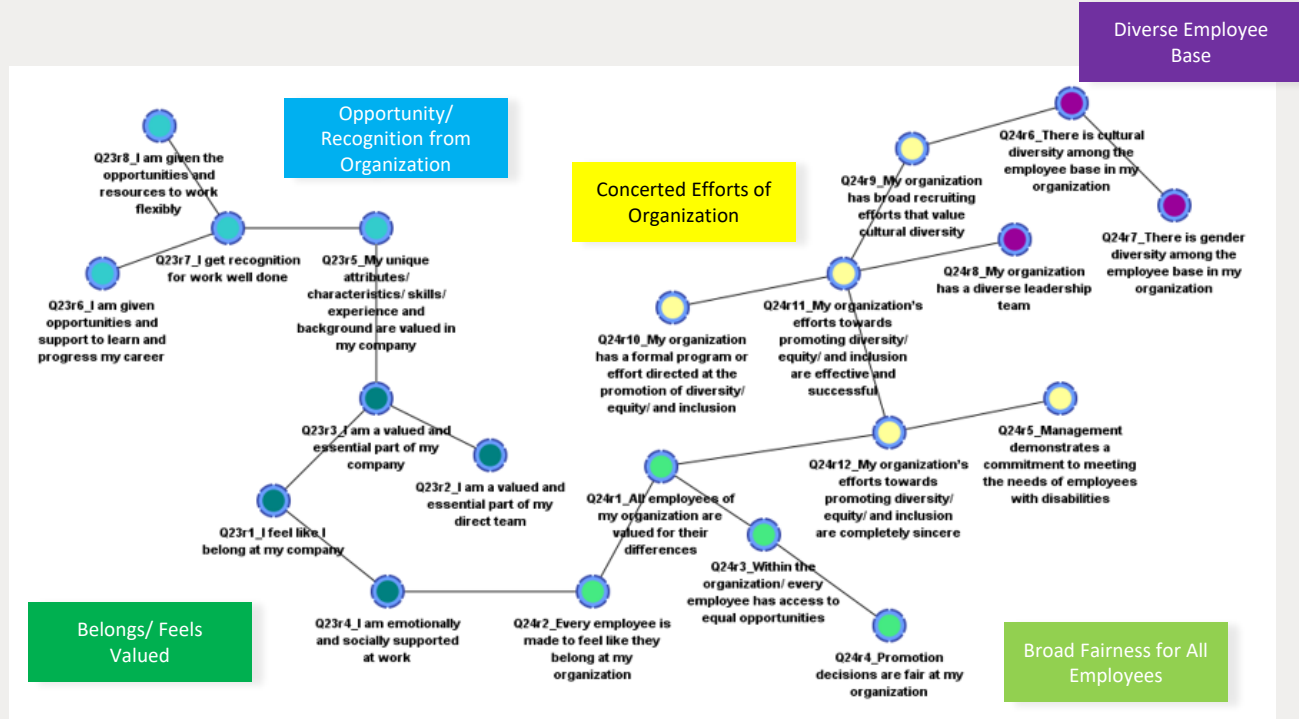
Average across countries.

Workplace Culture Factor Analysis

In order to assist with the analysis of the workplace culture data a factor analysis was run on the data from the 20 attitude statements from the general population survey.

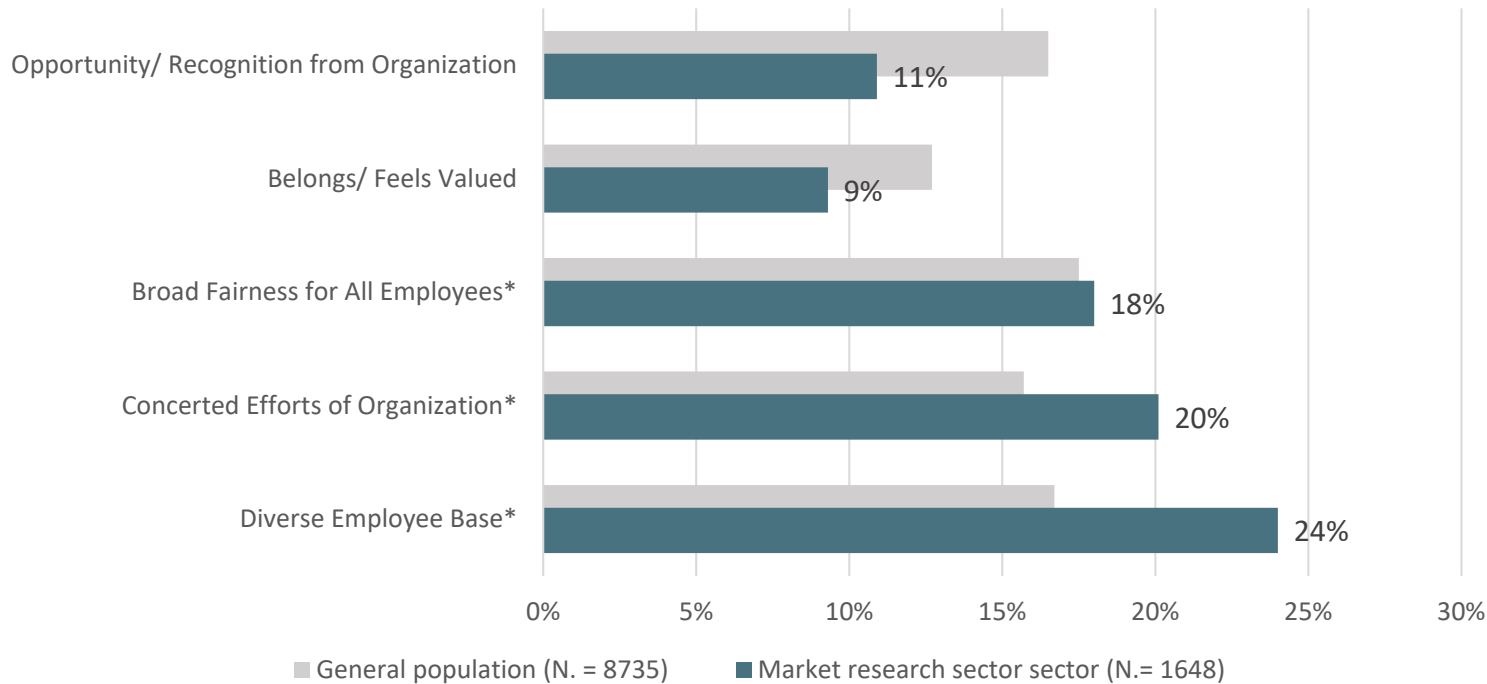
The analysis produced 5 factors as shown opposite.

We would like to thank RTi Research for conducting this factor analysis.



Compared to people in the general population, those working in the MR sector are less negative about opportunities and being valued in general in their work place but are clearly more negative on the diversity of the employee base where they work.

Does not believe that the company they work for has a positive DEI culture - % saying DISAGREE (bottom 2 box on a 5-point scale) - By Factor



Base: Those who have more than 1 employee working in their company or are not self-employed.

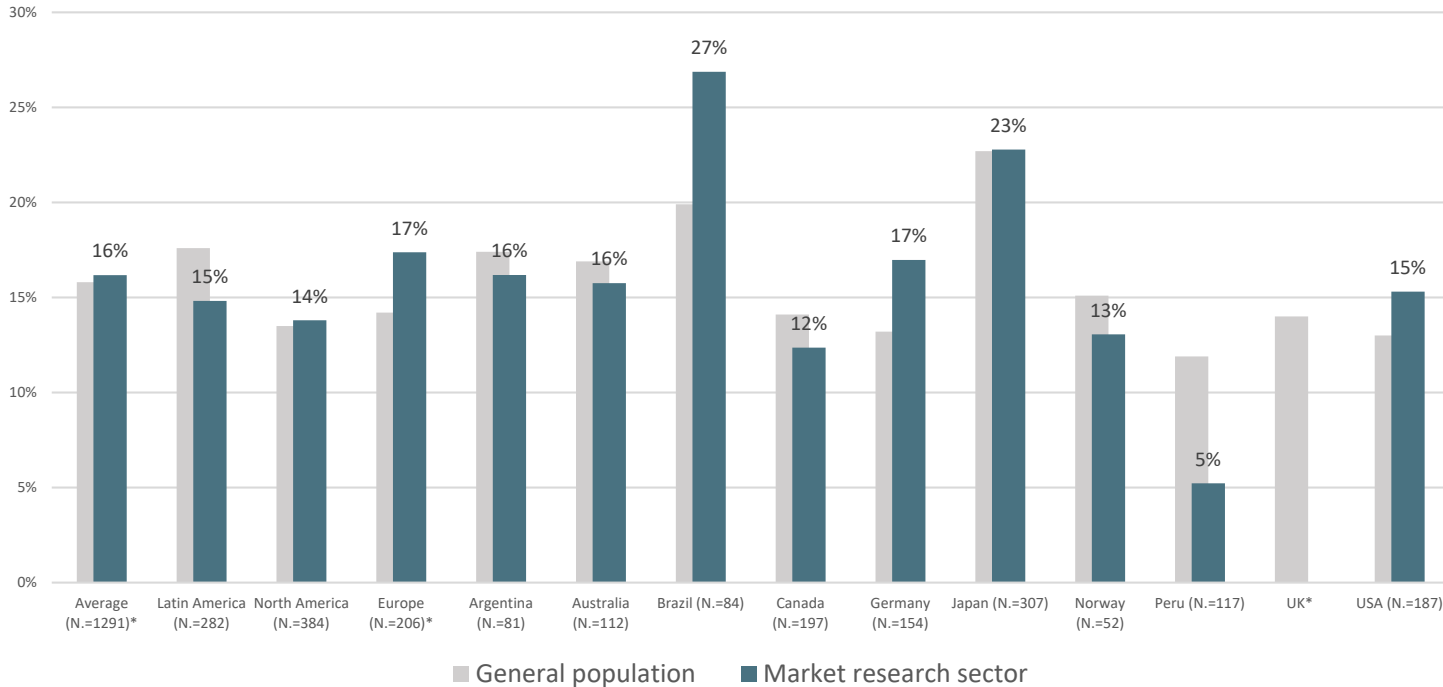
* Excludes UK data for the MR sector

Average across countries.

Overall the opinions of people working in the MR sector are similar to those of the general working population when it comes to workplace DEI culture.

Does not believe that the company they work for has a positive DEI culture with respect to: Average across all factors

- % saying DISAGREE (bottom 2 box on a 5-point scale) - By Country



Base: Those who have more than 1 employee working in their company or are not self-employed.

* Excludes UK data for the MR sector

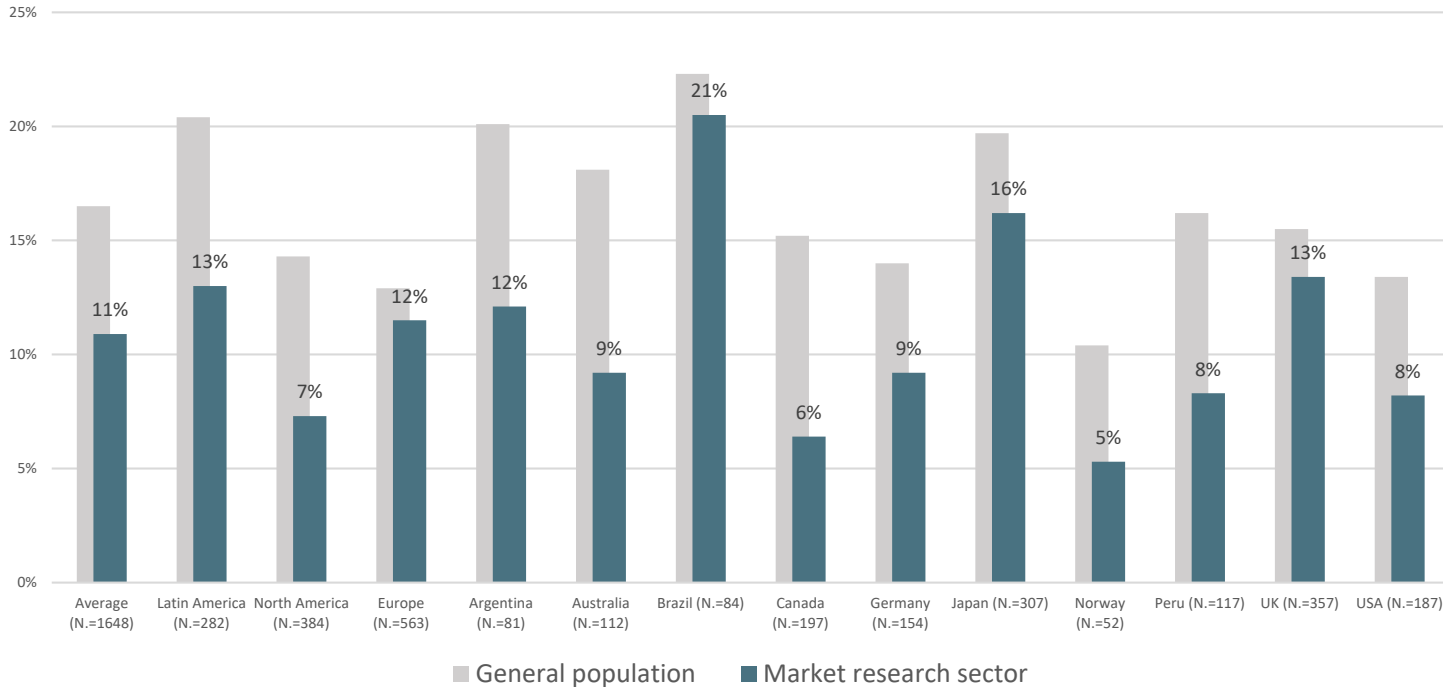
Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

Those working in the MR sector in Brazil and Japan are most likely to think negatively about their workplace when it comes to opportunity and recognition.

Does not believe that the company they work for has a positive DEI culture with respect to: Opportunity/ Recognition from Organization

- % saying DISAGREE (bottom 2 box on a 5-point scale) - By Country



Base: Those who have more than 1 employee working in their company or are not self-employed.

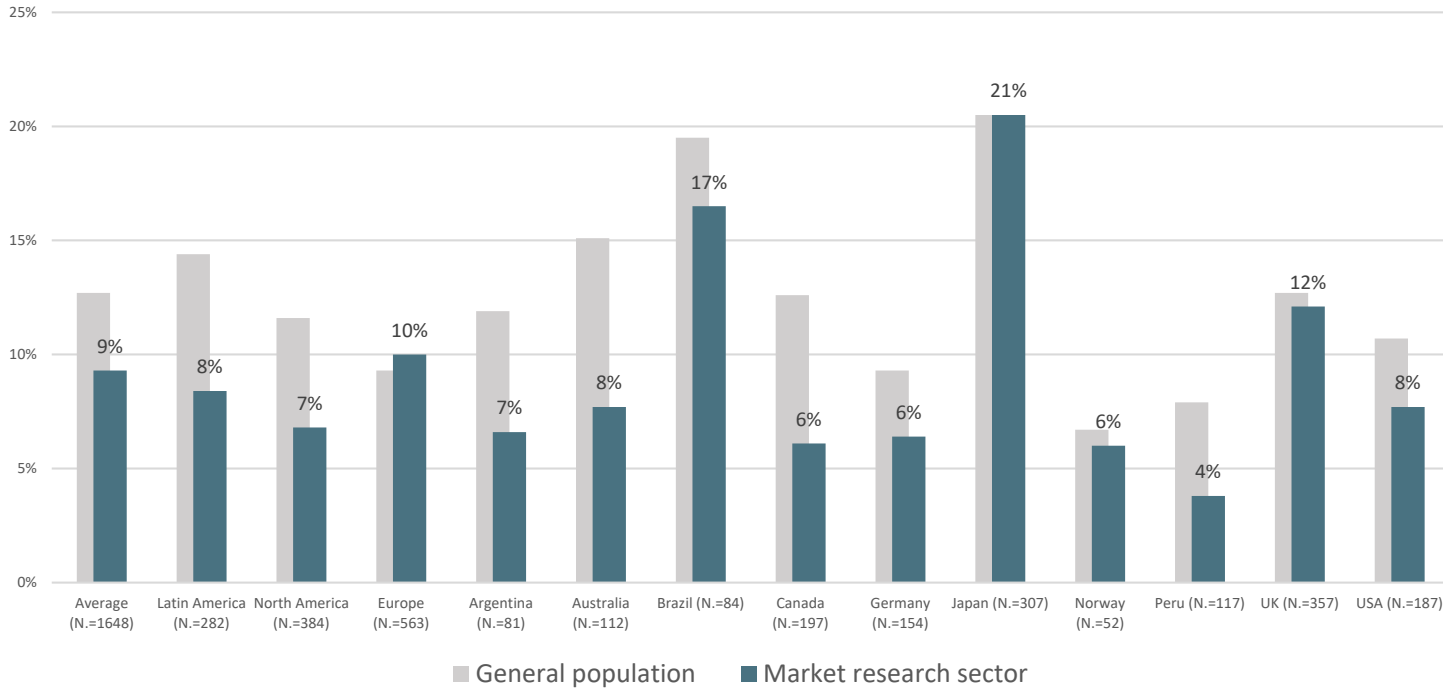
Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

The feeling of not belonging / not being valued is strongest in Japan, both within the MR sector as well as in the general population more broadly.

Does not believe that the company they work for has a positive DEI culture with respect to: Belongs/ Feels Valued

- % saying DISAGREE (bottom 2 box on a 5-point scale) - By Country



Base: Those who have more than 1 employee working in their company or are not self-employed.

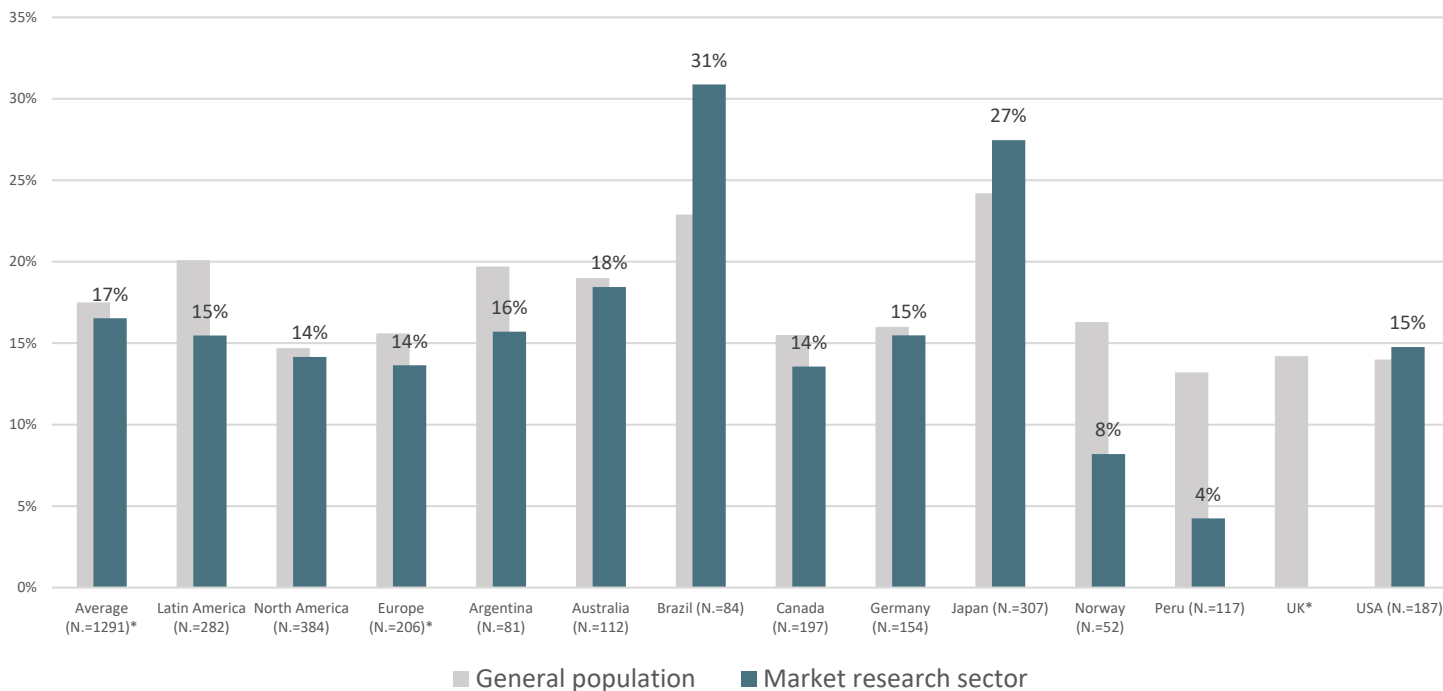
Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

Brazil and Japan also stand out as places where there is most negativity towards the perception of fairness for all employees in their organization.

Does not believe that the company they work for has a positive DEI culture with respect to: Broad Fairness for All Employees*

- % saying DISAGREE (bottom 2 box on a 5-point scale) - By Country



Base: Those who have more than 1 employee working in their company or are not self-employed.

* Excludes UK data for the MR sector

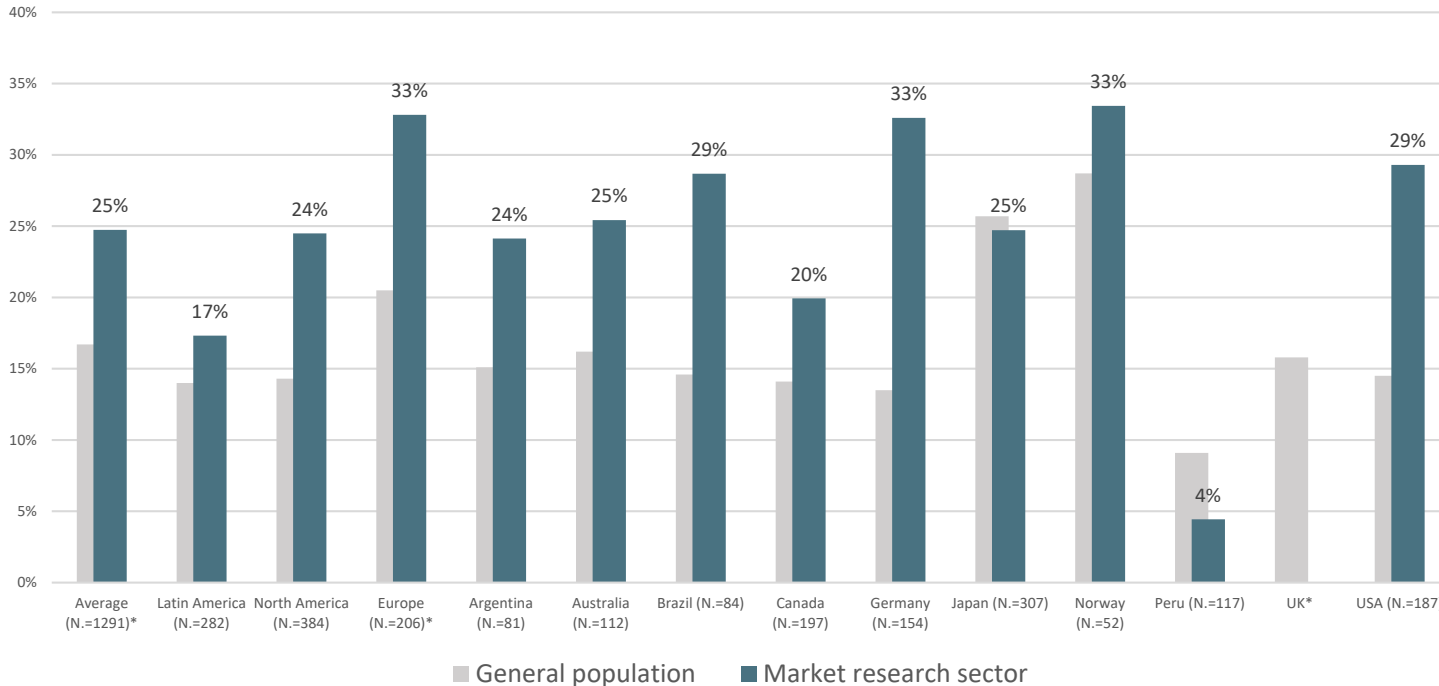
Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

One-in-four people working in the MR sector, in particular those in Germany and Norway, do not believe that the company where they work has a diverse employee base. This proportion is much higher than in the general population, especially in Germany.

Does not believe that the company they work for has a positive DEI culture with respect to: Diverse employee base*

- % saying DISAGREE (bottom 2 box on a 5-point scale) - By Country



Base: Those who have more than 1 employee working in their company or are not self-employed.

* Excludes UK data for the MR sector

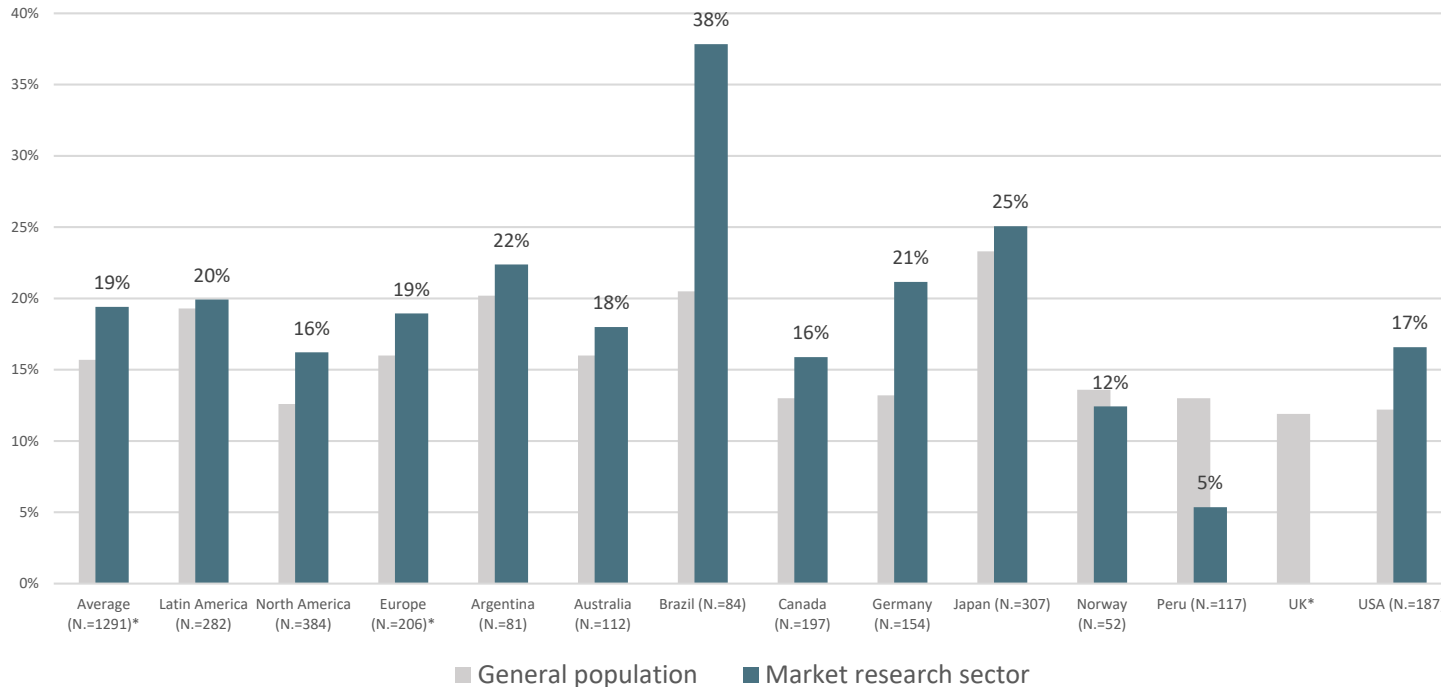
Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

People working in the MR sector in Brazil are most likely to disagree that their company makes concerted efforts related to DEI culture. The difference compared to the general population is marked.

Does not believe that the company they work for has a positive DEI culture with respect to: Concerted Efforts of Organization*

- % saying DISAGREE (bottom 2 box on a 5-point scale) - By Country



Base: Those who have more than 1 employee working in their company or are not self-employed.

* Excludes UK data for the MR sector

Base numbers shown for Market Research Sector only.

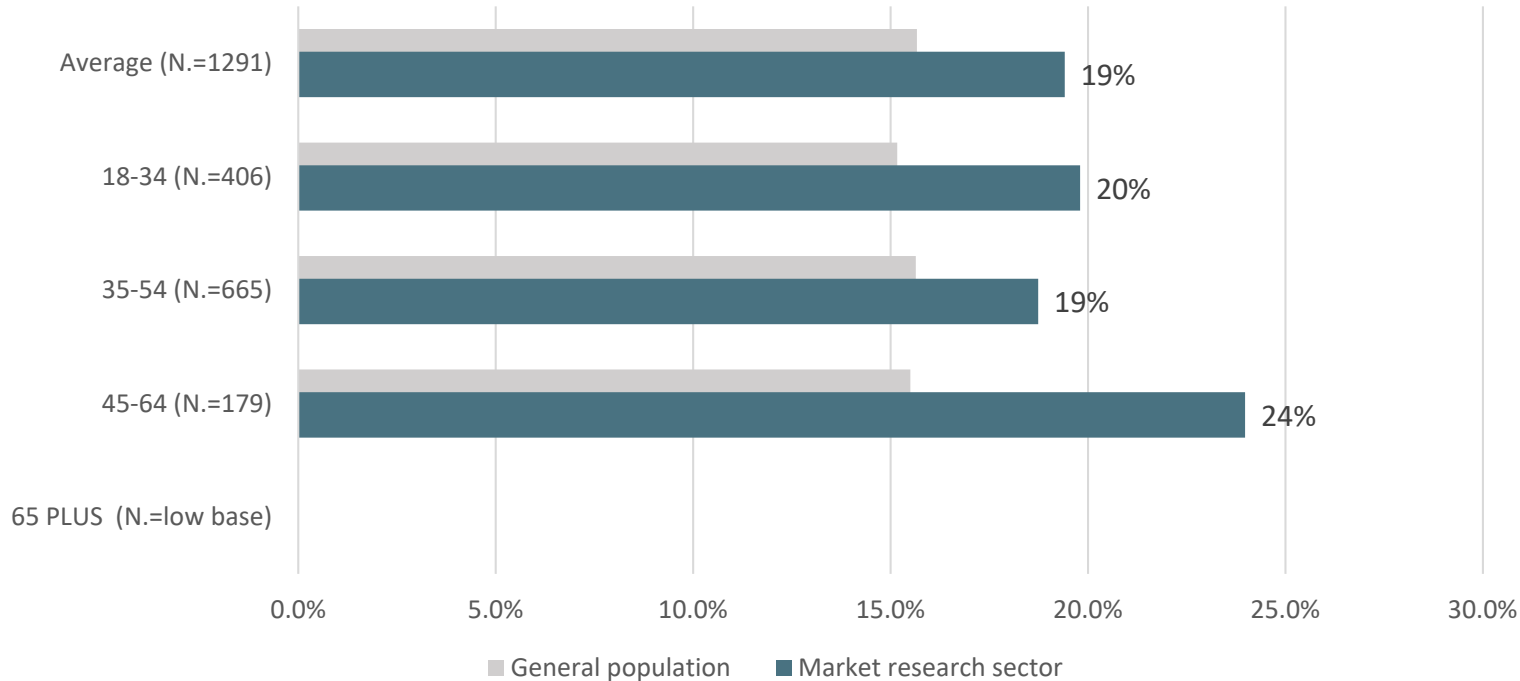
See Appendix for general population sample bases.

The following charts look at how different sub-groups evaluate the place where they work in terms of the concerted effort the organization is making on DEI matters. The MR sector data excludes the UK.

Does not believe that the company they work for has a positive DEI culture - % saying DISAGREE (bottom 2 box on a 5-point scale) – with respect to:

Concerted Efforts of Organization*

– By Age Group



Base: Those who have more than 1 employee working in their company or are not self-employed.

Note: All data in Japan is based on 20+.

* Excludes UK data for the MR sector

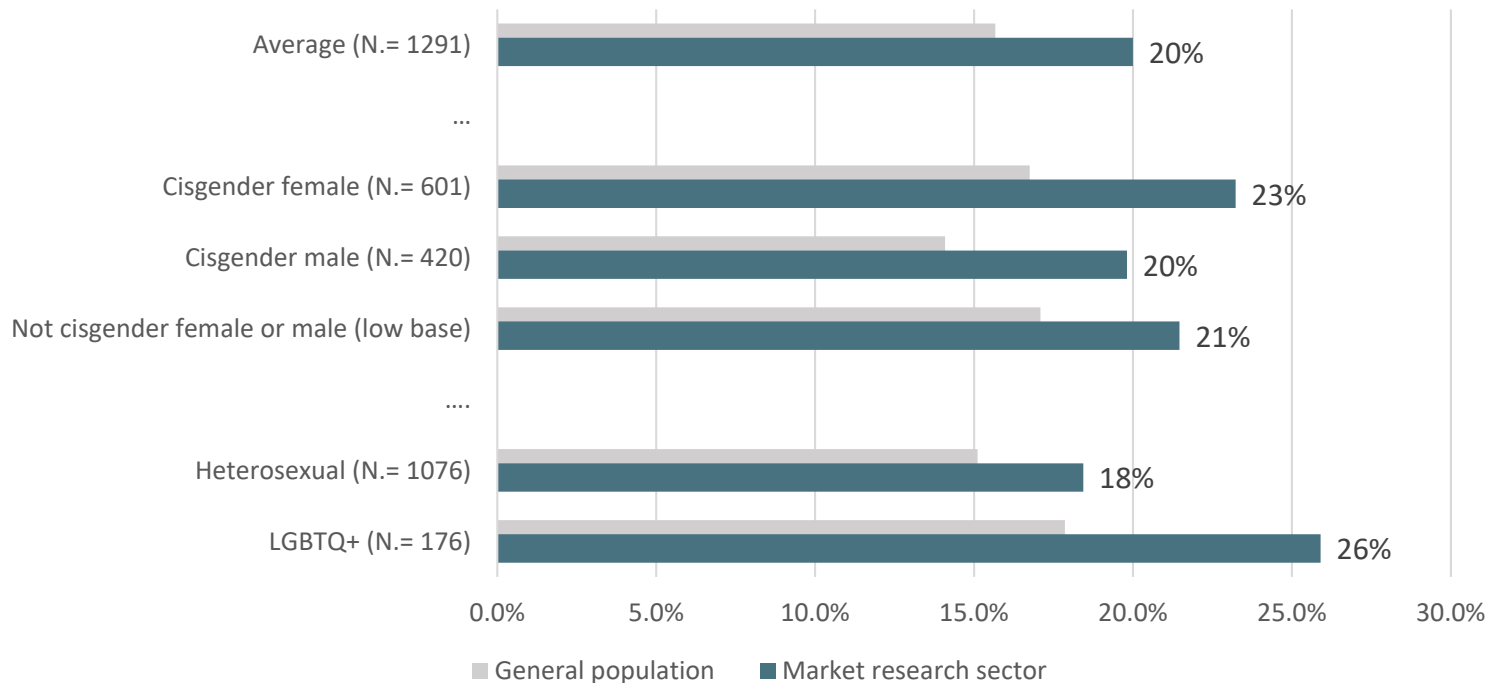
Base numbers shown for Market Research Sector only. See Appendix for general population sample bases.

LGBTQ+ people working in the MR sector are more negative about the concerted efforts of their organization on DEI matters than their heterosexual colleagues. This phenomenon is more pronounced than in the general population.

Does not believe that the company they work for has a positive DEI culture - % saying DISAGREE (bottom 2 box on a 5-point scale) - with respect to:

Concerted Efforts of Organization*

By Gender Identity (excluding AU/PE) / Sexual Orientation (1)



Base: Those who have more than 1 employee working in their company or are not self-employed.

* Excludes UK data for the MR sector

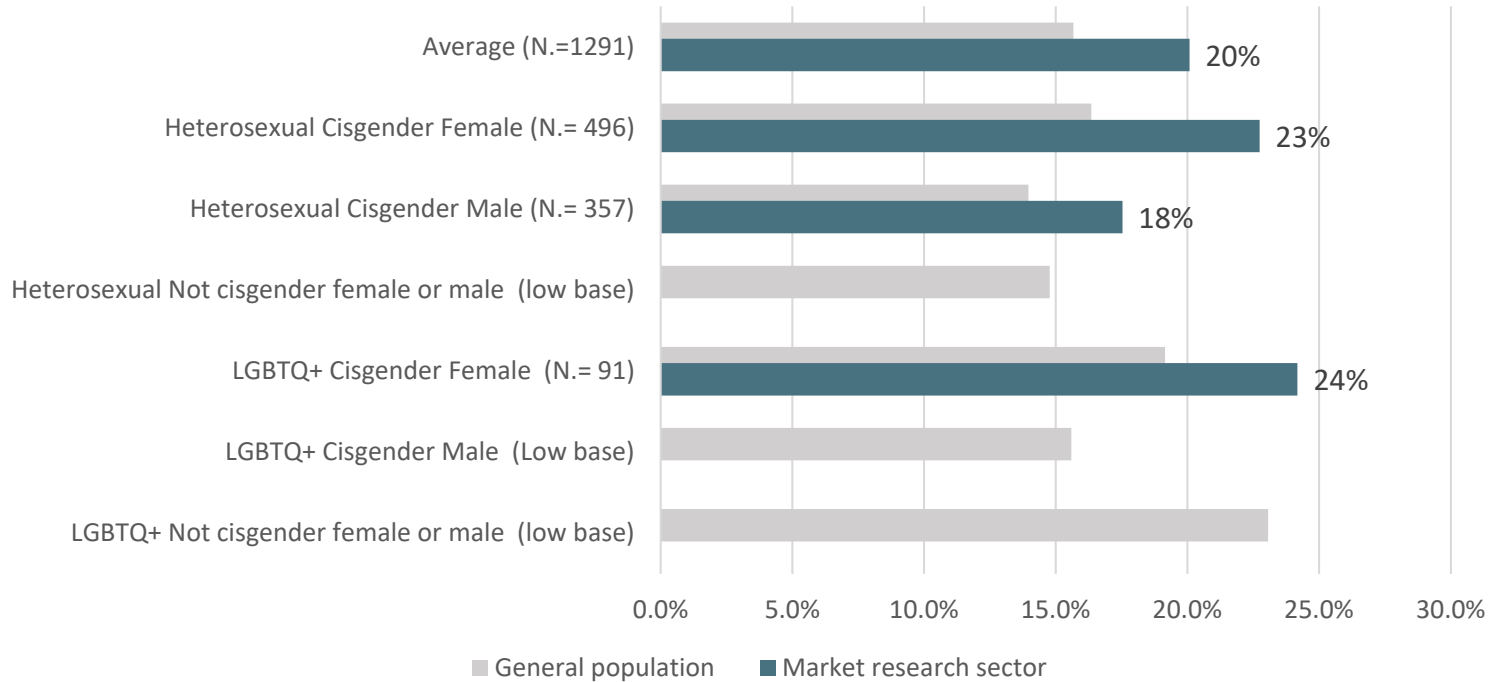
Base numbers shown for Market Research Sector only. See Appendix for general population sample bases.

Heterosexuals cisgender females working in the MR sector are somewhat more negative about the concerted efforts of their organization on DEI matters than their male heterosexual colleagues.

Does not believe that the company they work for has a positive DEI culture - % saying DISAGREE (bottom 2 box on a 5-point scale) - with respect to:

Concerted Efforts of Organization*

Excluding AU/PE - Identity / Sexual Orientation (2)



Base: Those who have more than 1 employee working in their company or are not self-employed.

* Excludes UK data for the MR sector

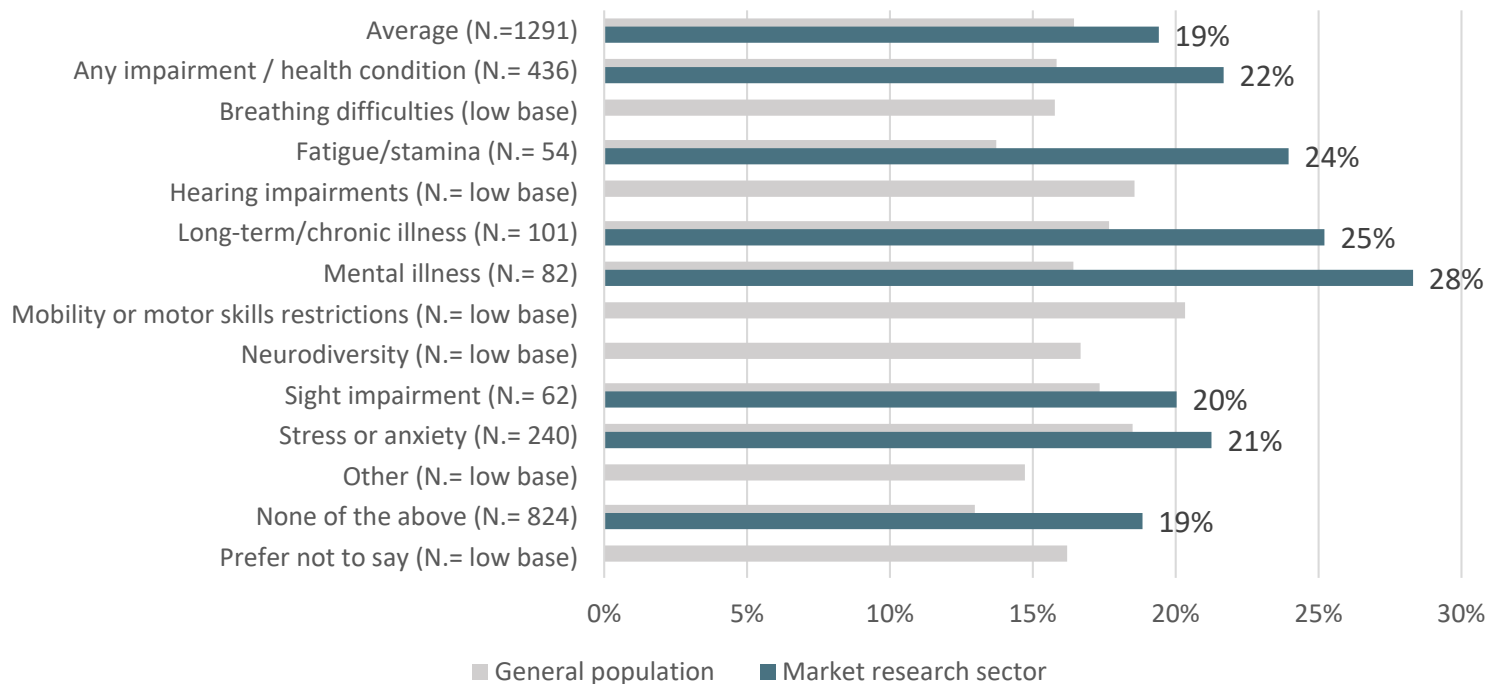
Base numbers shown for Market Research Sector only. See Appendix for general population sample bases.

When looking at the impact of impairments / health conditions, it is people with mental illness working in the MR sector who are most negative about the concerted efforts of their organization on DEI matters. This phenomenon is not noticeable amongst the general public.

Does not believe that the company they work for has a positive DEI culture - % saying DISAGREE (bottom 2 box on a 5-point scale) - with respect to:

Concerted Efforts of Organization*

By Impairments / Health Conditions



Base: Those who have more than 1 employee working in their company or are not self-employed.

* Excludes UK data for the MR sector

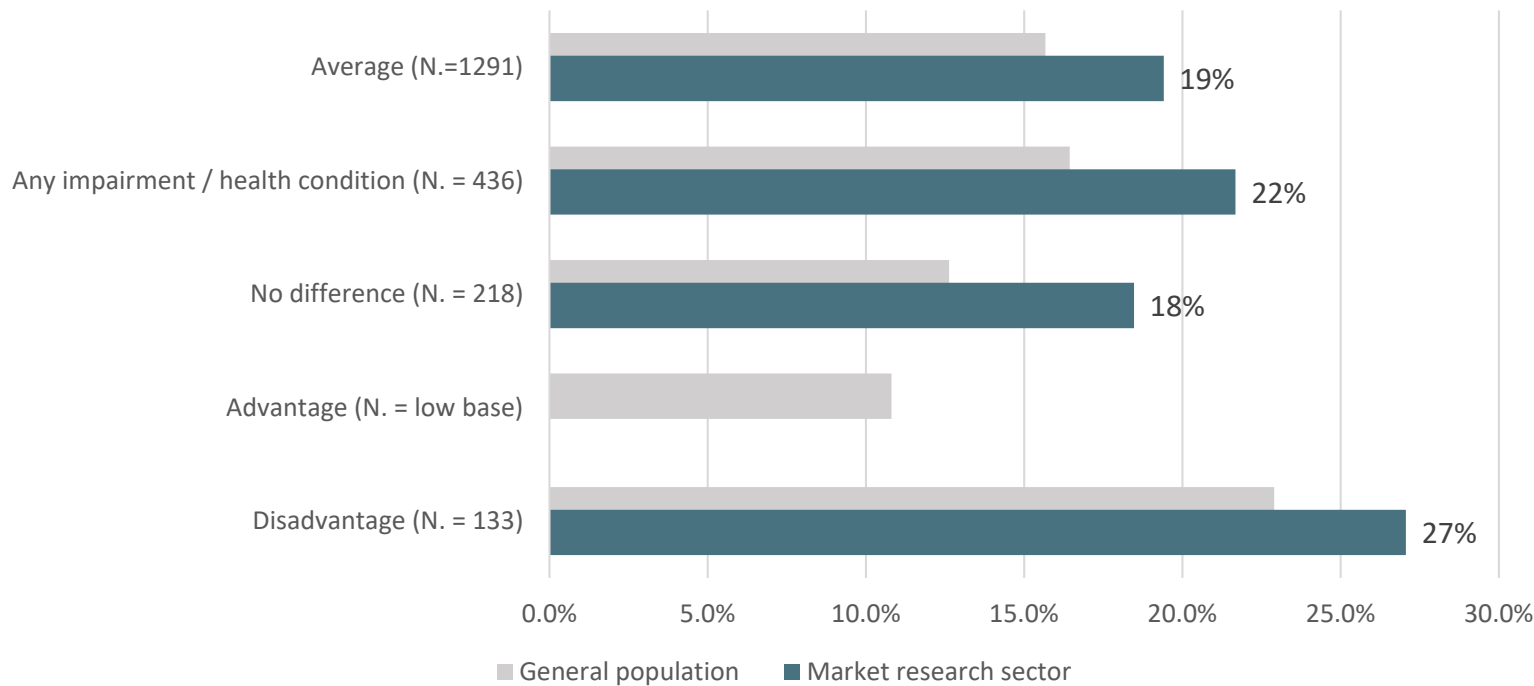
Base numbers shown for Market Research Sector only. See Appendix for general population sample bases.

People with impairments / health conditions, who feel they have been disadvantaged, whether working inside the MR sector or elsewhere, are much more likely to think negatively about the efforts their organization is making on DEI matters.

Does not believe that the company they work for has a positive DEI culture - % saying DISAGREE (bottom 2 box on a 5-point scale) - with respect to:

Concerted Efforts of Organization*

By Impact of Impairment(s) or Health Condition(s) on Career Progression



Base: Those who have more than 1 employee working in their company or are not self-employed.

* Excludes UK data for the MR sector

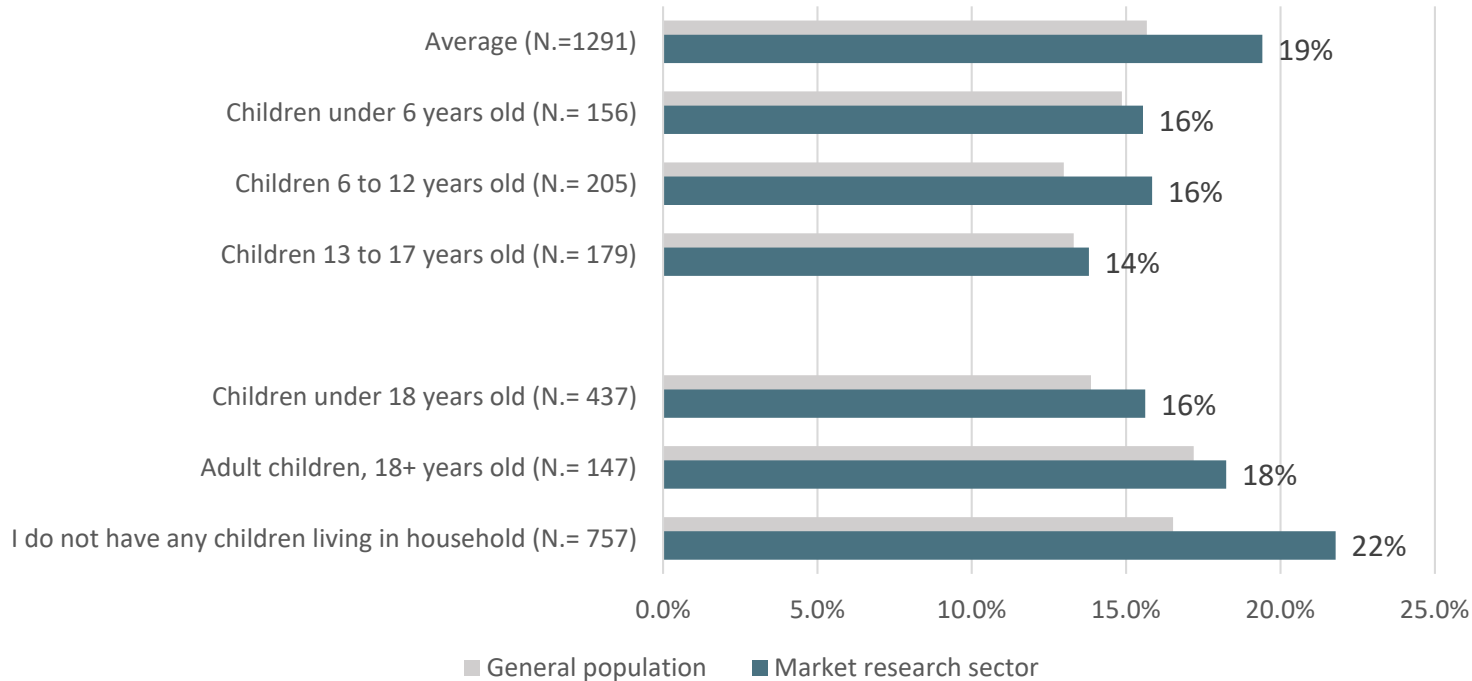
Base numbers shown for Market Research Sector only. See Appendix for general population sample bases.

People without children working in the MR sector are more critical of the organization for whom they work than those with children when it comes to giving an opinion on the concerted efforts of the organization where they work on DEI matters.

Does not believe that the company they work for has a positive DEI culture - % saying DISAGREE (bottom 2 box on a 5-point scale) - with respect to:

Concerted Efforts of Organization*

By Family Status



Base: Those who have more than 1 employee working in their company or are not self-employed.

* Excludes UK data for the MR sector

Base numbers shown for Market Research Sector only.

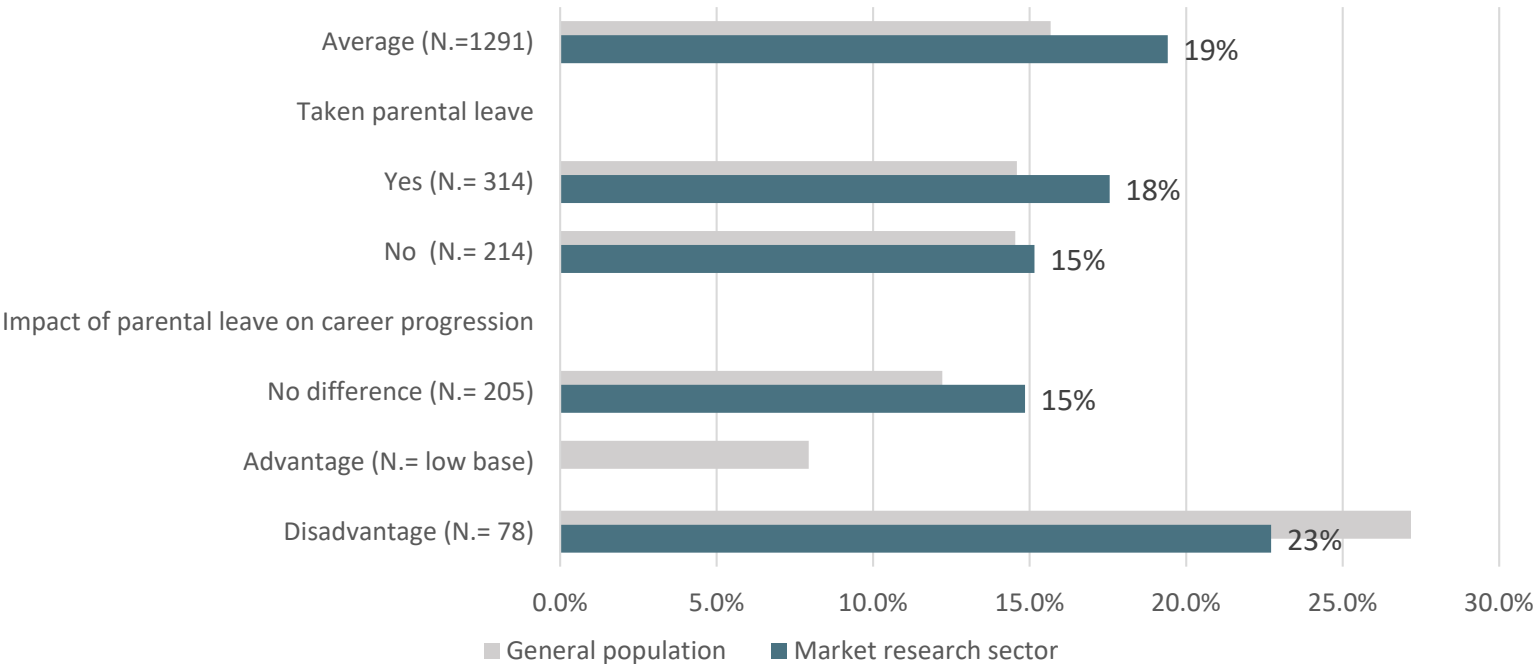
See Appendix for general population sample bases.

People who have taken parental leave and, who feel they have been disadvantaged because of doing so, are more likely to think negatively about their organization's efforts on DEI matters. The difference is not so big in the MR sector, however, as it is amongst the general public.

Does not believe that the company they work for has a positive DEI culture - % saying DISAGREE (bottom 2 box on a 5-point scale) - with respect to:

Concerted Efforts of Organization*

By Parental Leave



Base: Those who have more than 1 employee working in their company or are not self-employed.

* Excludes UK data for the MR sector

Base numbers shown for Market Research Sector only. See Appendix for general population sample bases.



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PERSONAL EXPERIENCE OF
DIRECT DISCRIMINATION IN
THE WORKPLACE

PERSONAL EXPERIENCE OF DIRECT DISCRIMINATION IN THE WORKPLACE



This section of the report looks at people's personal experience with discrimination in their current (most recent) place of work through two different lens:

- The type of discrimination
- Reasons for discrimination

KEY FINDINGS

PERSONAL EXPERIENCE OF DIRECT DISCRIMINATION IN THE WORKPLACE - BY TYPE OF DISCRIMINATION

One-in-two people working in the MR sector have personal experience with direct discrimination in the workplace, which is somewhat lower than amongst the general population (58%).

Those working in the MR sector in Brazil and the UK (two-thirds of more) are more likely than others to have experienced discrimination.

One-in-five people (21%) working in the MR sector have personal experience of **unfair treatment by the organization** (vs. 29% in the general population). Such experience in the MR sector is even more common in Brazil, the UK and Australia.

Just under one-in-five (17%) of people working in the MR sector have personal experience of a **negative colleague environment** at work (vs. 25% in the general population). People working in the MR sector in Brazil and the UK are even more likely to have such an experience.

7% of people working in the MR sector have personal experience with **harassment**, which is much lower than in the general population (16%).

In the MR sector, age does not correlate with personal experience with discrimination, whereas amongst the general population, younger adults are more likely to have personal experience with discrimination.

In the MR sector, cisgender males are less likely than others to have personal experience with direct discrimination in the workplace. Amongst the general population, not cisgender males and females are much more likely than their cisgender counter-parts to have personal experience with direct discrimination in the workplace.

In the MR sector, people with fatigue, mental health and stress conditions are more likely to have had personal experience with discrimination. Amongst the general population, those with neurodiversity are the most likely to have had personal experience with discrimination.

PERSONAL EXPERIENCE OF DIRECT DISCRIMINATION IN THE WORKPLACE - BY REASON FOR DISCRIMINATION

In the MR sector, from the potential reasons covered by the research, **age** and **gender** are the most common reasons cited for discrimination (12 AND 14% respectively). Whilst in general, personal experience with discrimination is lower in the MR sector than amongst the general population, this is not the case with respect to gender discrimination where it is equally prevalent in the MR sector as the general population.

PERSONAL EXPERIENCE OF DIRECT DISCRIMINATION IN THE WORKPLACE DUE TO AGE

In the MR sector, age discrimination is most prevalent in Brazil and Australia. In Australia the level of age discrimination in the MR sector surpasses that of the level amongst the general population. Age discrimination in the MR sector is lowest in Argentina, Peru and Japan.

Both younger and older adults are more likely than middle-aged people to have personal experience with discrimination because of age. Amongst the general population, it is, in particular, younger adults who have personal experience with discrimination due to age.

PERSONAL EXPERIENCE OF DIRECT DISCRIMINATION IN THE WORKPLACE DUE TO GENDER, GENDER IDENTITY OR SEXUAL ORIENTATION

Almost one-in-five people working in the MR sector in Europe or North America have had personal experience with gender discrimination. This is higher than in the general population in those regions. Personal experience with gender discrimination is low in Japan, Norway and Peru.

One-in-four (25%) cisgender females working in the MR sector have had personal experience with gender discrimination in the workplace, which is significantly higher than in the general population (18%). In contrast only one-in-twenty (2%) cisgender males working in the MR sector have had personal experience with gender discrimination in the workplace, which is significantly lower than in the general population (9%).

Personal experience with sexual orientation / gender identity discrimination is low in the MR sector (3%) and much lower than amongst the general population (6%).

However, one-in-ten LGBTQ+ people working in the MR sector have had personal experience with sexual orientation / gender identity discrimination in the workplace, which is similar to the proportion in the general population.

Amongst the general public as many as one-in-five not cisgender males or females have had personal experience with sexual orientation / gender identity discrimination in the workplace.

Both in the MR sector as well as amongst the general population, LGBTQ+ males (15%) are more likely to have had personal experience with sexual orientation / gender identity discrimination in the workplace.

PERSONAL EXPERIENCE OF DIRECT DISCRIMINATION IN THE WORKPLACE DUE TO ETHNICITY OR NATIONAL ORIGIN

Personal experience with discrimination due to ethnicity is low in the MR sector (5%) and lower than amongst the general population (9%). The difference compared to the general population is most noticeable in Brazil, Peru and the USA.

KEY FINDINGS

The experiencing of discrimination due to national origin is low in the MR sector (3%) and is also low amongst the general population (5%). The difference compared to the general population is most noticeable in Brazil, Peru and the USA. Amongst the general public, personal experience with discrimination due to national origin it is highest in Peru, the UK and the USA.

PERSONAL EXPERIENCE OF DIRECT DISCRIMINATION IN THE WORKPLACE DUE TO RELIGION

Personal experience with discrimination due to religion is very low in the MR sector (2%) and much lower than amongst the general population (6%). The difference compared to the general population is most noticeable in Brazil and Germany.

PERSONAL EXPERIENCE OF DIRECT DISCRIMINATION IN THE WORKPLACE DUE TO DISABILITY STATUS

Personal experience with discrimination due to disability status is low in the MR sector (3%) and lower than amongst the general population (6%). Amongst the general population, Germany stands out as the country where personal experience with discrimination due to disability status is highest and at 12% is double the cross-country average.

In the MR sector it is people with fatigue, mental illness and long-term illness who are most likely to have personal experience with

discrimination due to disability status (an average of one-in-ten in these cohorts).

Amongst the general population, it is people with mobility restrictions and neurodiversity who have the most personal experience with discrimination due to disability status (one-in-five). NB. Low bases prevent a similar analysis in the MR sector).

PERSONAL EXPERIENCE OF DIRECT DISCRIMINATION IN THE WORKPLACE DUE TO FAMILY STATUS

One-in-twenty people in the MR sector have had personal experience with discrimination due to their family status. The proportion is similar across all countries except Brazil where it is double.

15% of people working in the MR sector who have children under 6 say they have personal experience with discrimination due to family status, which is three times the average.

PERSONAL EXPERIENCE OF DIRECT DISCRIMINATION IN THE WORKPLACE DUE TO SOCIAL STATUS

Personal experience with discrimination due to social status is very low in the MR sector (3%) and much lower than amongst the general population (9%). The difference compared to the general population is most noticeable in Latin America (3% vs 14%).

PERSONAL EXPERIENCE OF DIRECT DISCRIMINATION IN THE WORKPLACE

BY TYPE OF DISCRIMINATION

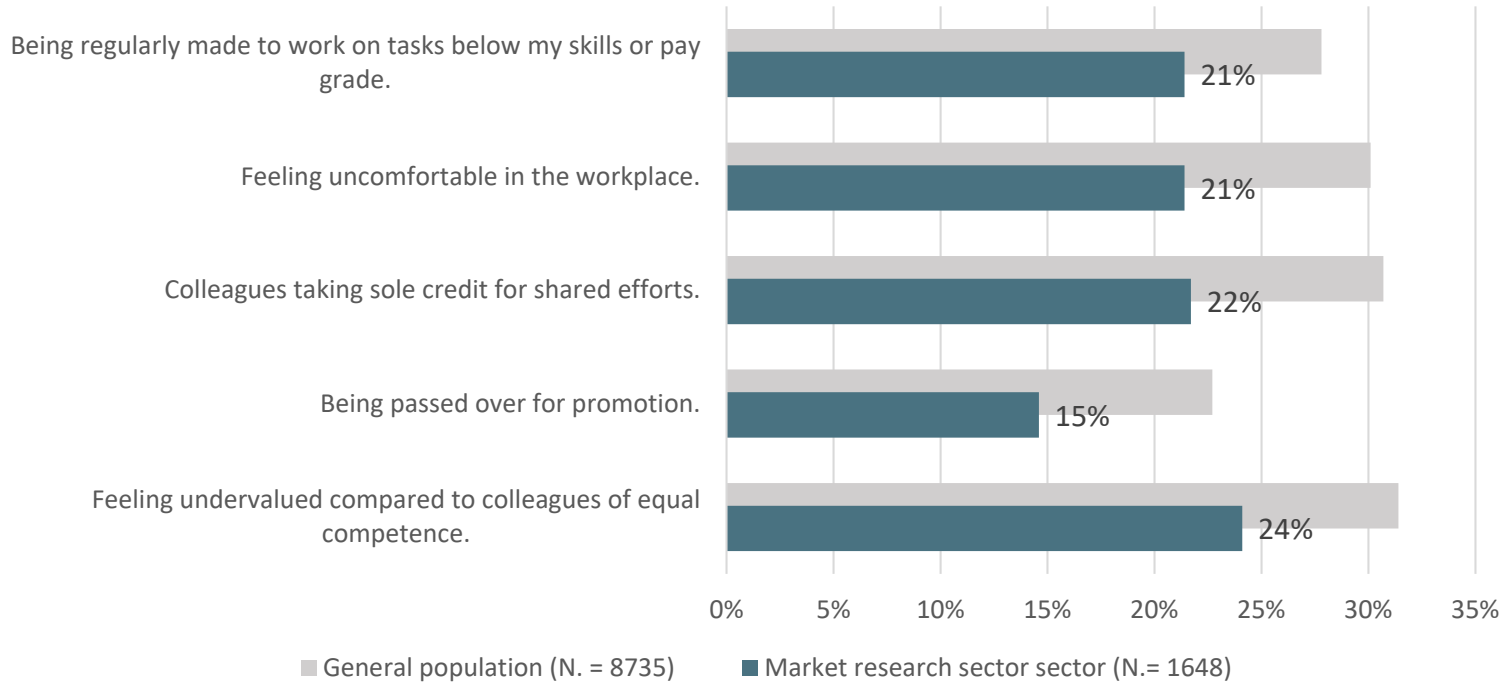


This section of the report looks at people's personal experience with discrimination in their currently (most recent) place of work by the type of discrimination.

The survey asked about 10 specific types of discrimination, from which three factors have been created in order to sharpen the analysis.

A significant proportion of people working in the MR sector have experienced direct discrimination in the workplace in a number of different ways, although the proportions are somewhat less across the board when compared to the general working population.

Personal Experience with Direct Discrimination in the Workplace- % saying YES - By Statement (2)

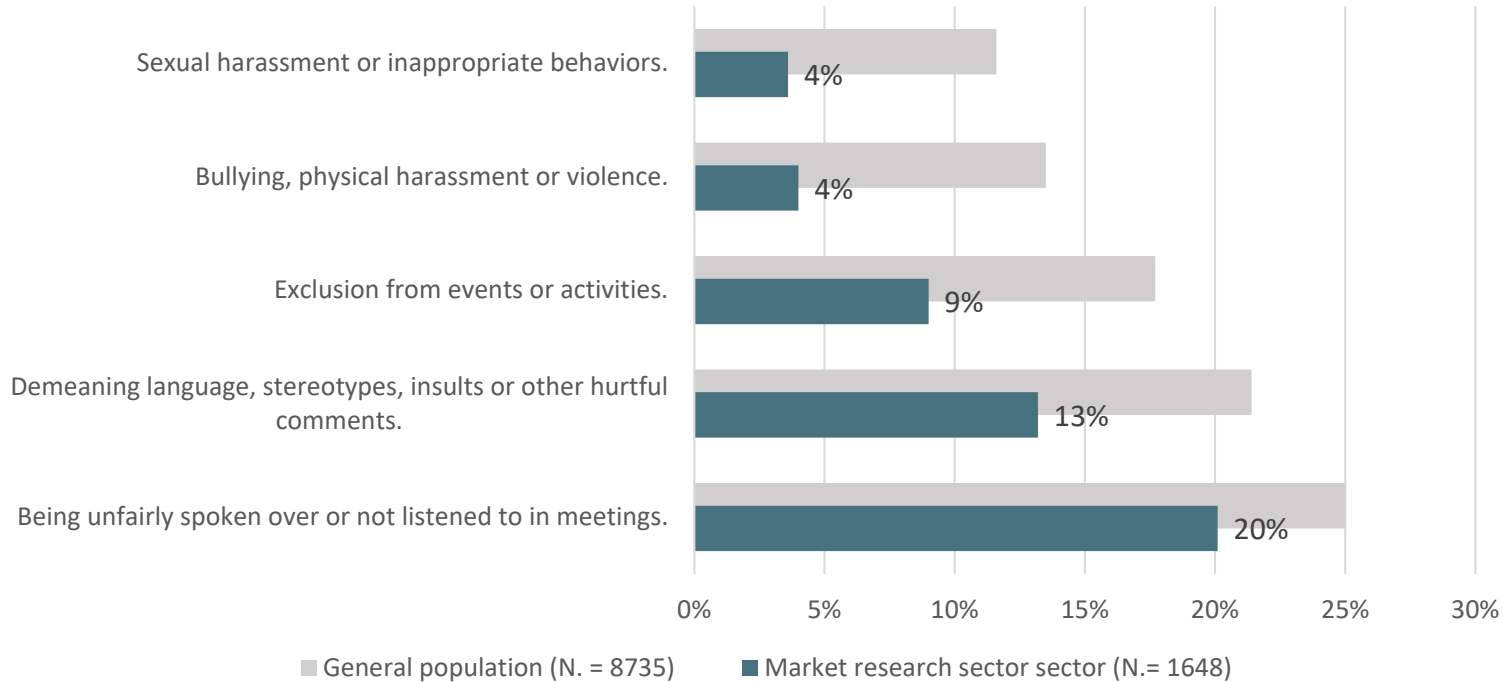


Base: Those who have more than 1 employee working in their company or are not self-employed.

Average across countries.

People working in the MR sector are much less likely than the general working population to have personal experience of direct discrimination in the workplace, although as many as one-in-five of those working in the MR sector do claim to have personal experience with being unfairly spoken over or not listened to in meetings.

Personal Experience with Direct Discrimination in the Workplace- % saying YES - By Statement (1)



Base: Those who have more than 1 employee working in their company or are not self-employed.

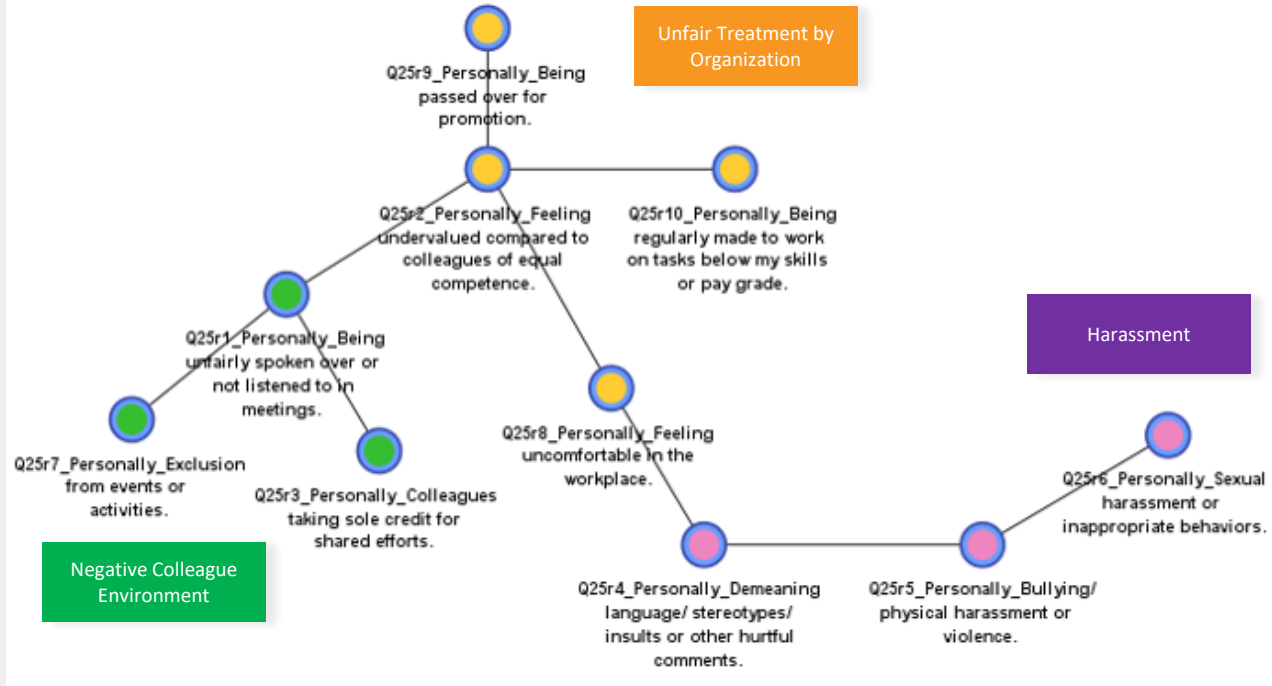
Average across countries.

Discrimination Factor Analysis

In order to assist with the analysis of the discrimination data a factor analysis was run on the data from the 10 statements from the general population survey.

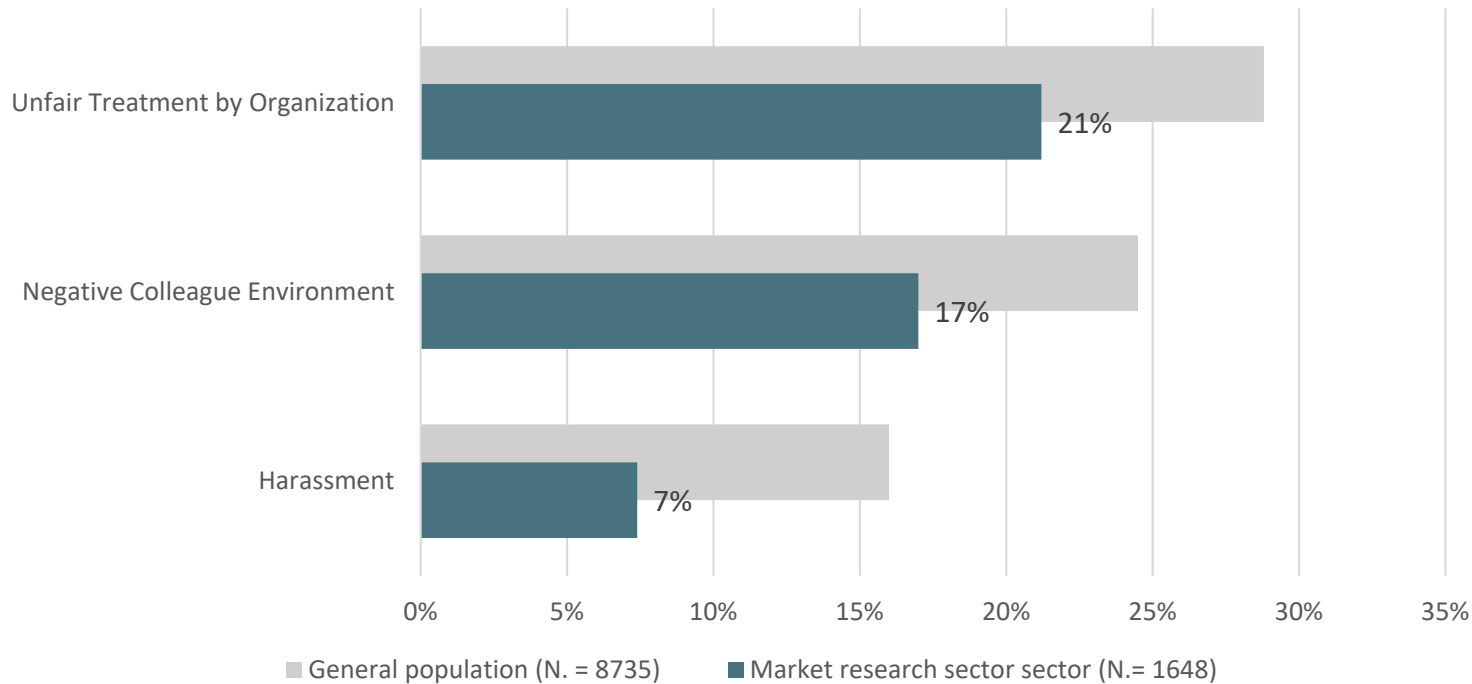
The analysis produced 3 factors as shown opposite.

We would like to thank RTi Research for conducting this factor analysis.



People working in the MR sector are much less likely than the general working population to have personal experience of direct discrimination in the workplace, especially when it comes to harassment.

Personal Experience with Direct Discrimination in the Workplace- % saying YES - By Factor

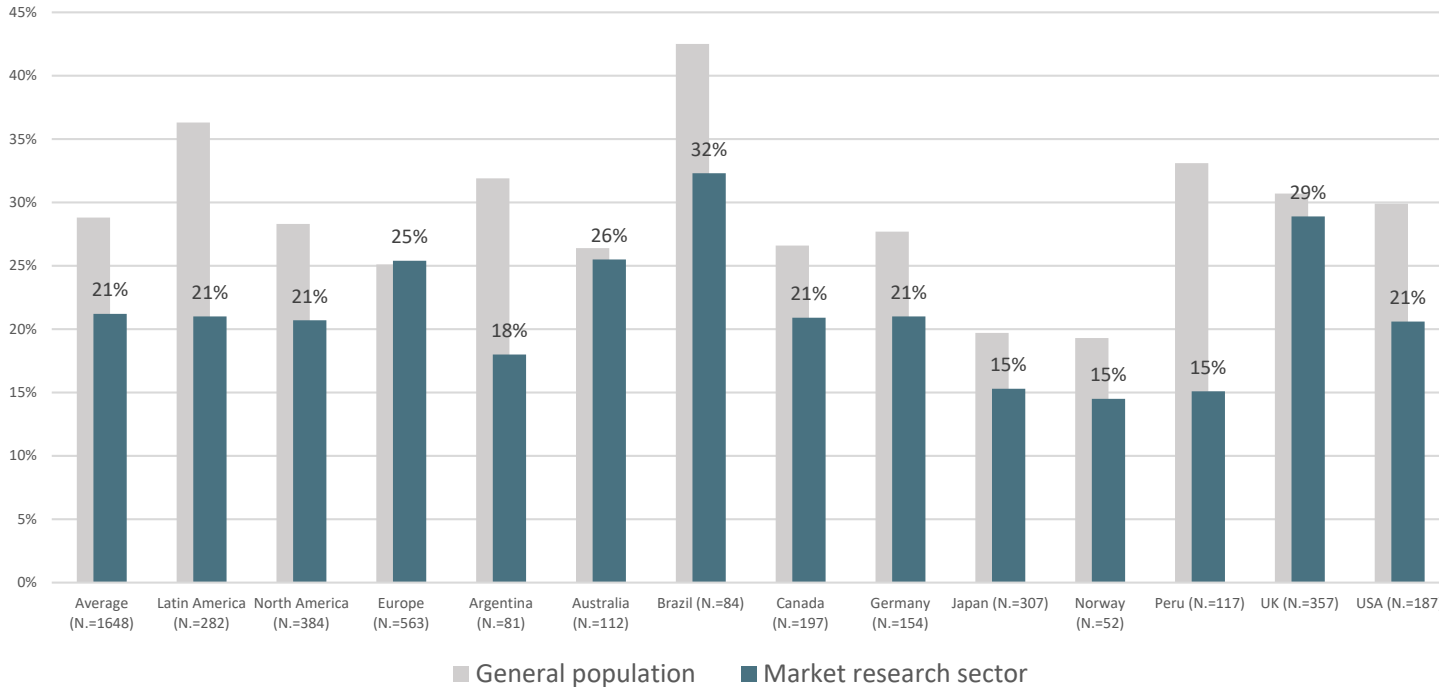


Base: Those who have more than 1 employee working in their company or are not self-employed.

Average across countries.

People working in the MR sector in Brazil, the UK and Australia are most likely to say they have personal experience of unfair treatment by the organization. Relative to the general population, people working in the MR sector in Argentina and Peru are much less likely to have experienced unfair treatment by the organization.

**Personal Experience with Direct Discrimination in the Workplace Because of:
Unfair Treatment by Organization**
- % saying YES - By Country



Base: Those who have more than 1 employee working in their company or are not self-employed.

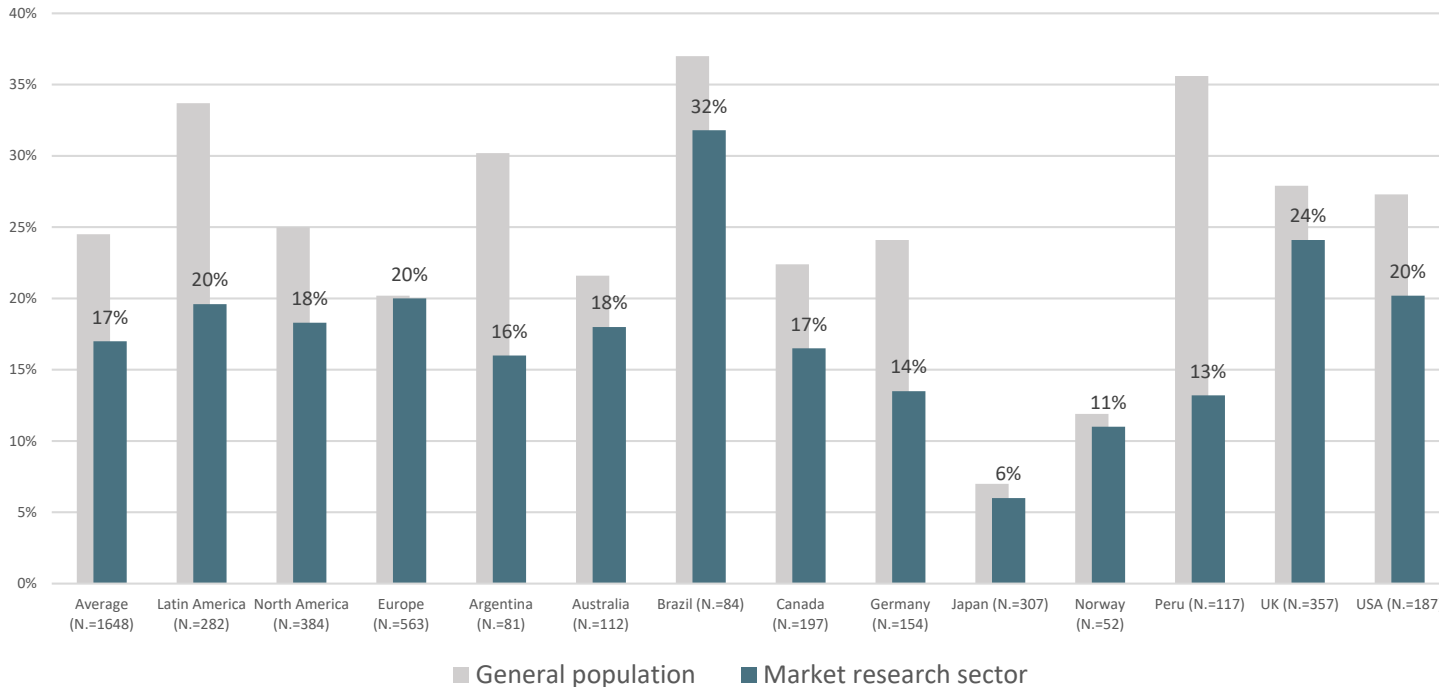
Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

People working in the MR sector in Brazil and the UK are most likely to say they have personal experience of a negative colleague environment. Relative to the general population, people working in the MR sector in Argentina and Peru are much less likely to have experienced a negative colleague environment.

Personal Experience with Direct Discrimination in the Workplace Because of: Negative Colleague Environment

- % saying DISAGREE (bottom 2 box on a 5-point scale) - By Country



Base: Those who have more than 1 employee working in their company or are not self-employed.

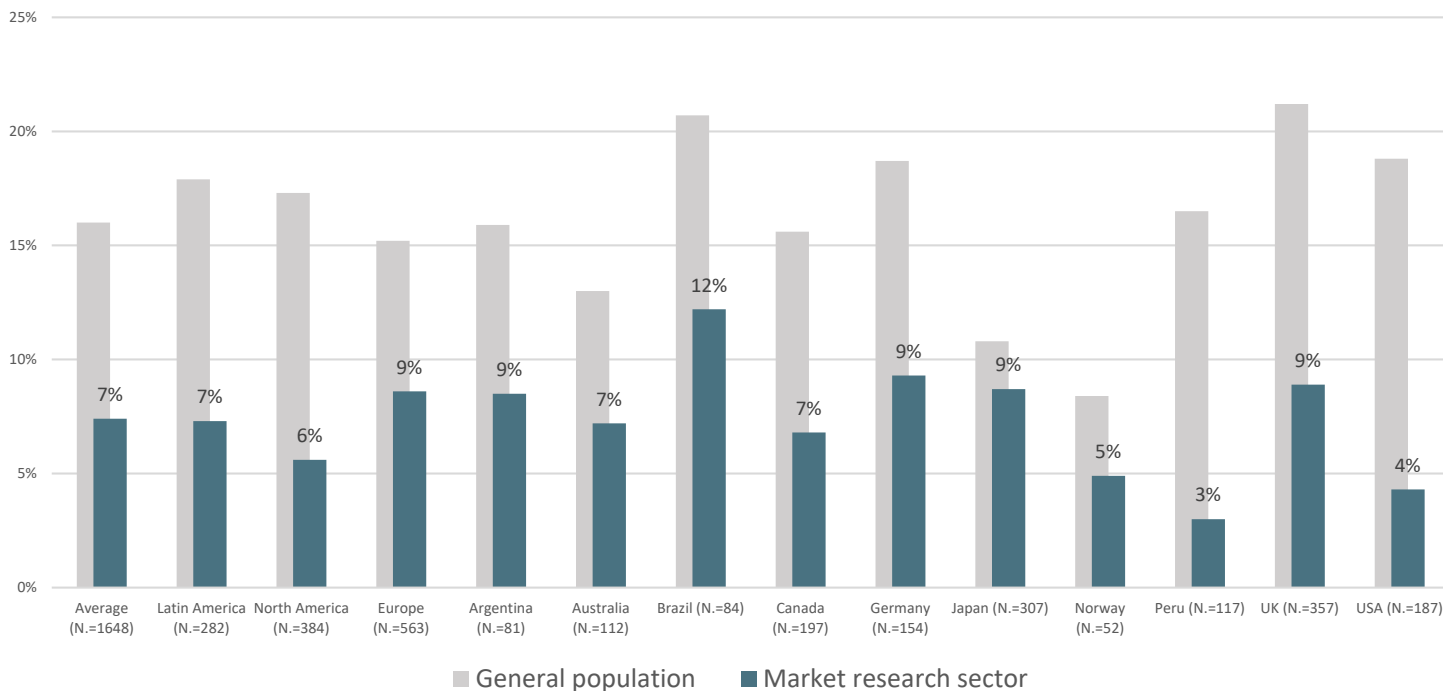
Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

People working in the MR sector are much less likely to have personal experience with harassment than people working in other sectors. By country, personal experience with harassment in the MR sector is relatively high in Brazil, Argentina, Germany, Japan and the UK.

Personal Experience with Direct Discrimination in the Workplace Because of Harassment

- % saying DISAGREE (bottom 2 box on a 5-point scale) - By Country



Base: Those who have more than 1 employee working in their company or are not self-employed.

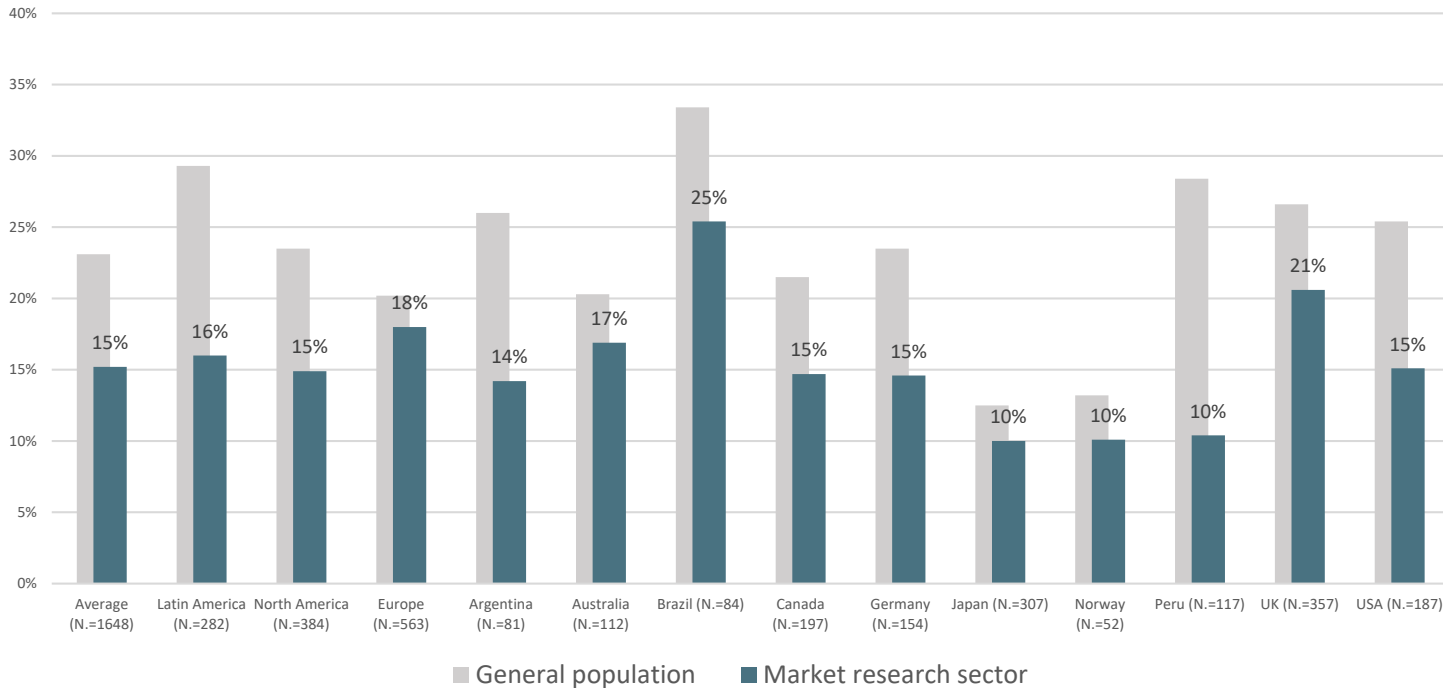
Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

Based on the average across all factors, the experience with personal direct discrimination in the MR sector is highest in Brazil and the UK.

Personal Experience with Direct Discrimination in the Workplace

- % saying YES - Average across all factors - By Country



Base: Those who have more than 1 employee working in their company or are not self-employed.

Base numbers shown for Market Research Sector only.

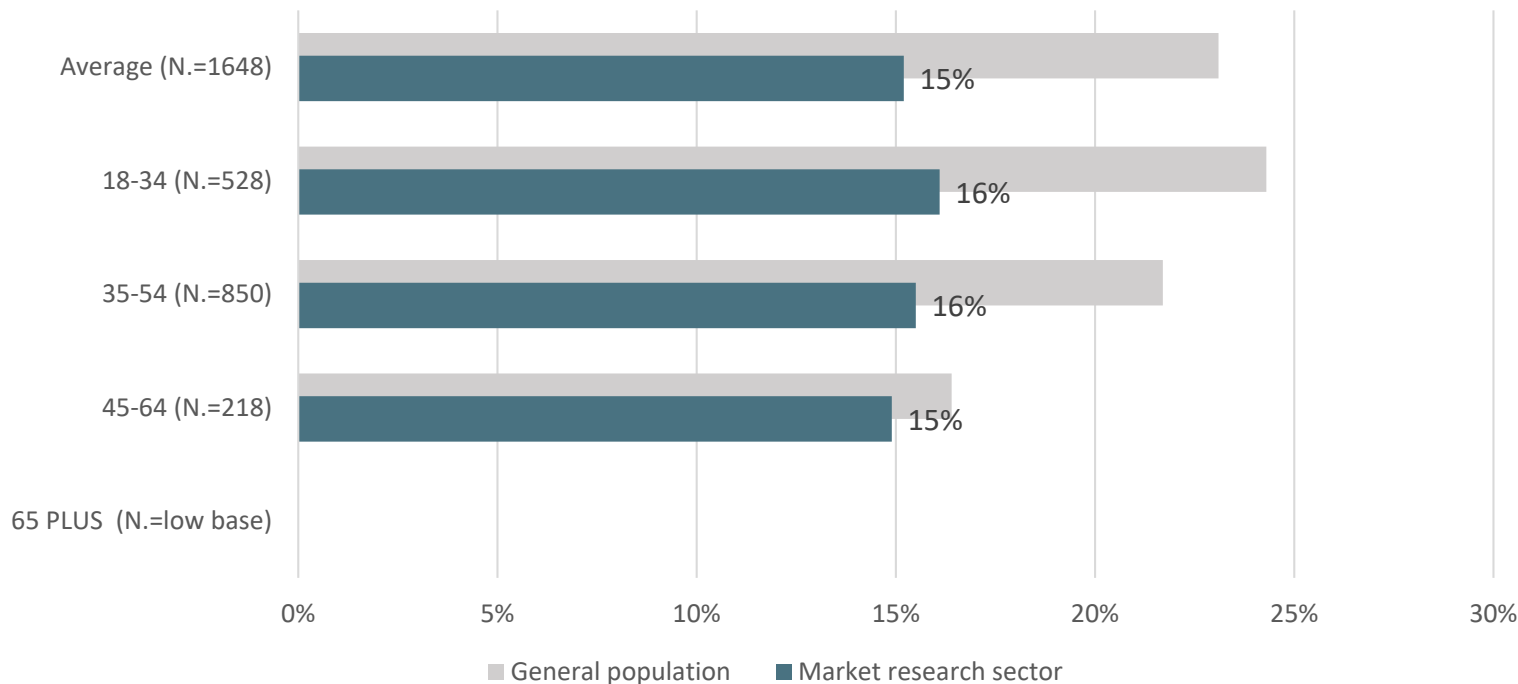
See Appendix for general population sample bases.

In the MR sector, age does not correlate with personal experience with discrimination, whereas amongst the general population, younger adults are more likely to have personal experience with discrimination.

Personal Experience with Direct Discrimination in the Workplace

% saying YES - Average across all factors

– By Age Group



Base: Those who have more than 1 employee working in their company or are not self-employed.

Note: Market research sector in UK is based on 16+. All data in Japan is based on 20+.

Base numbers shown for Market Research Sector only.

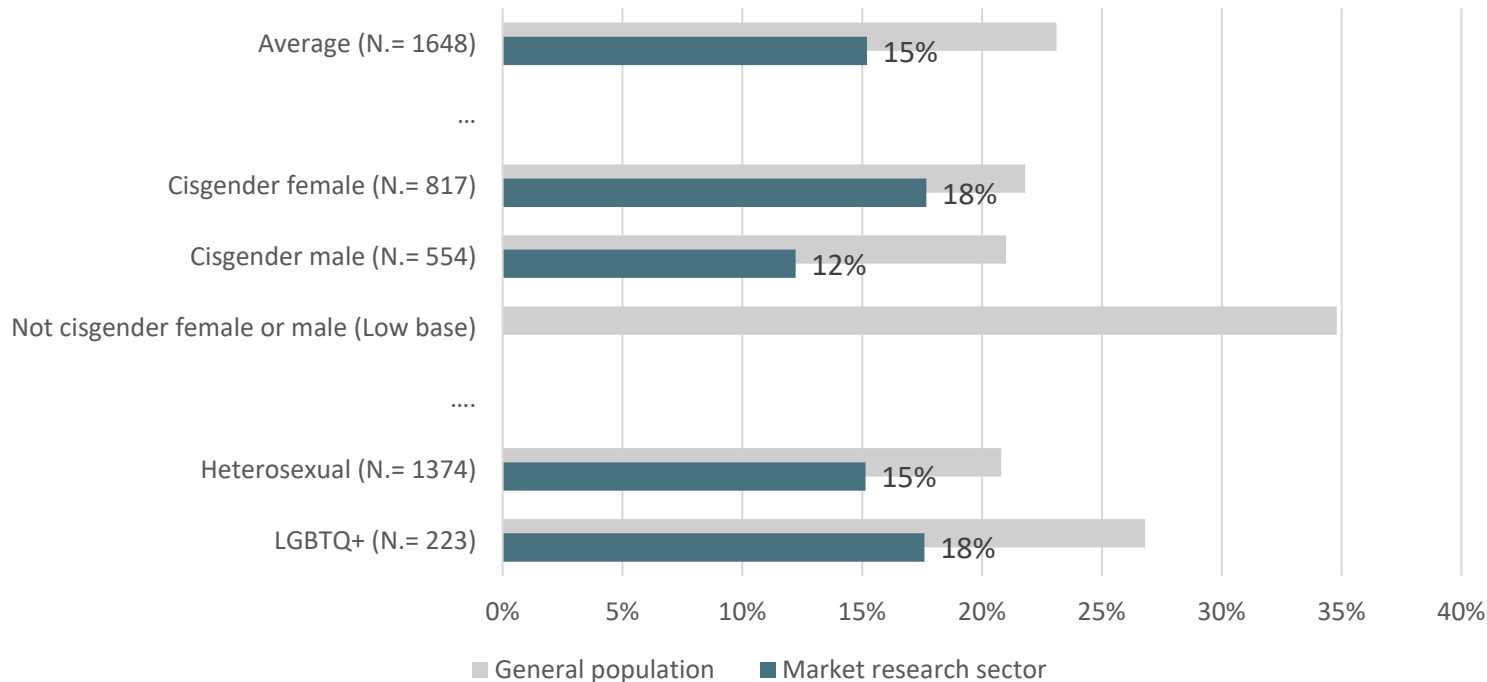
See Appendix for general population sample bases.

In the MR sector, cisgender males are less likely than others to have personal experience with direct discrimination in the workplace. Amongst the general population, not cisgender males and females are much more likely than their cisgender counter-parts to have personal experience with direct discrimination in the workplace.

Personal Experience with Direct Discrimination in the Workplace

% saying YES - Average across all factors

By Gender Identity (excluding AU/PE) / Sexual Orientation (1)



Base: Those who have more than 1 employee working in their company or are not self-employed.

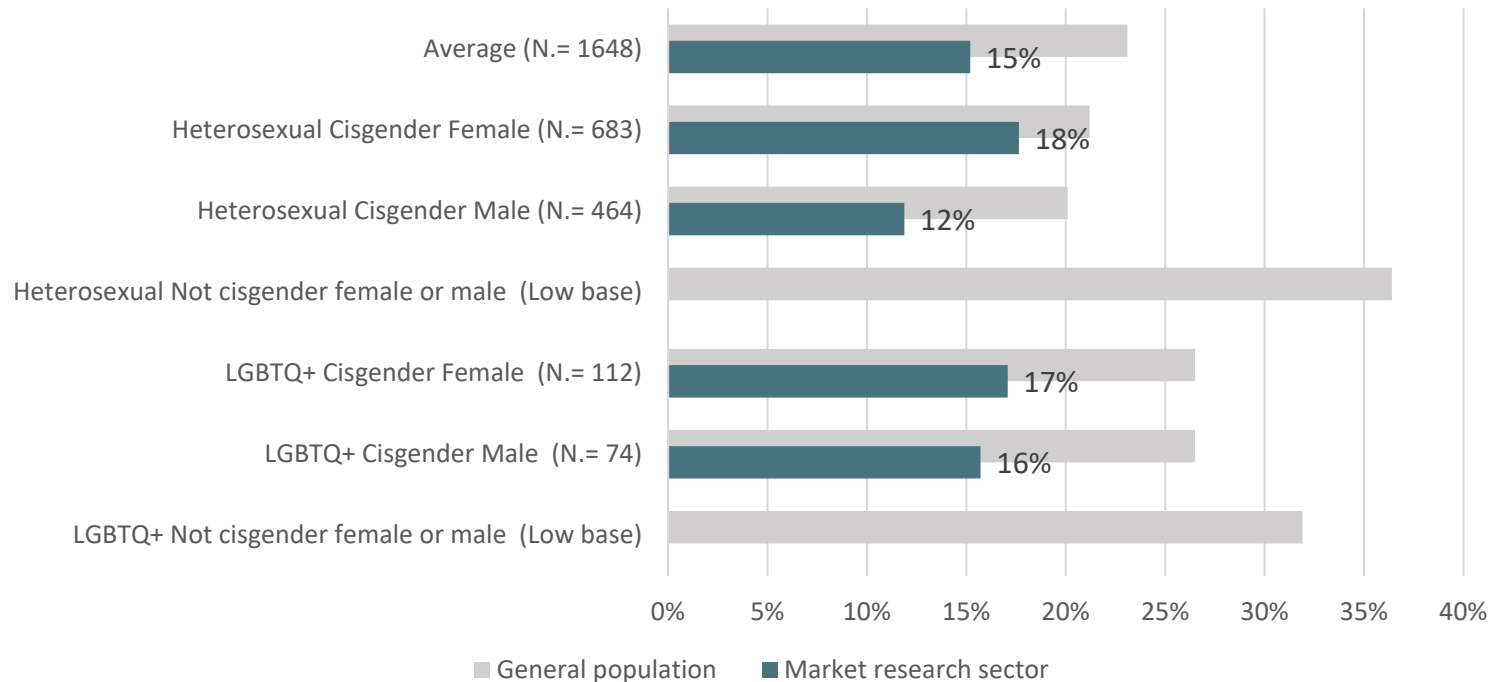
Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

Personal Experience with Direct Discrimination in the Workplace

% saying YES - Average across all factors

- Excluding AU/PE - By Gender Identity / Sexual Orientation (2)



Base: Those who have more than 1 employee working in their company or are not self-employed.

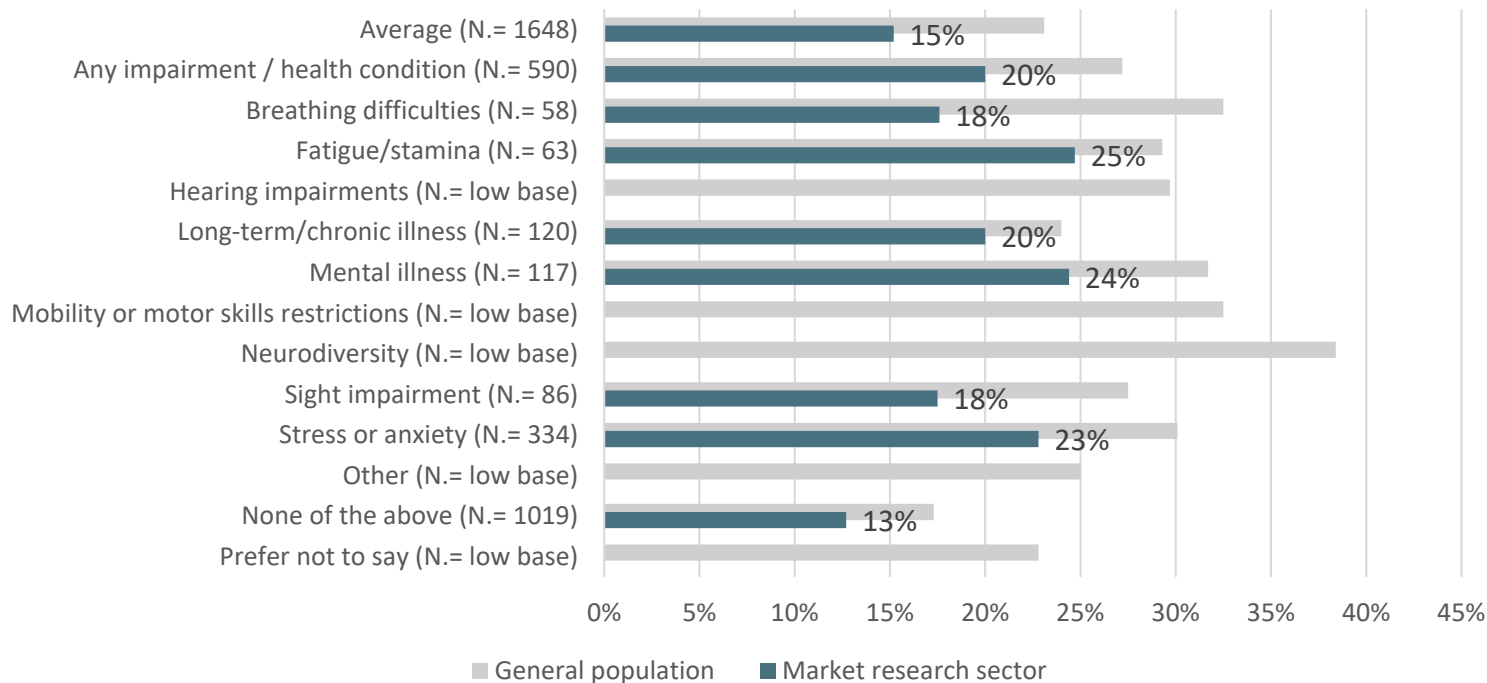
Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

In the MR sector, people with fatigue, mental health and stress conditions are more likely to have had personal experience with discrimination. Amongst the general population, those with neurodiversity are the most likely to have had personal experience with discrimination.

Personal Experience with Direct Discrimination in the Workplace

- % saying YES - Average across all factors - By Impairments/Health Conditions



Base: Those who have more than 1 employee working in their company or are not self-employed.

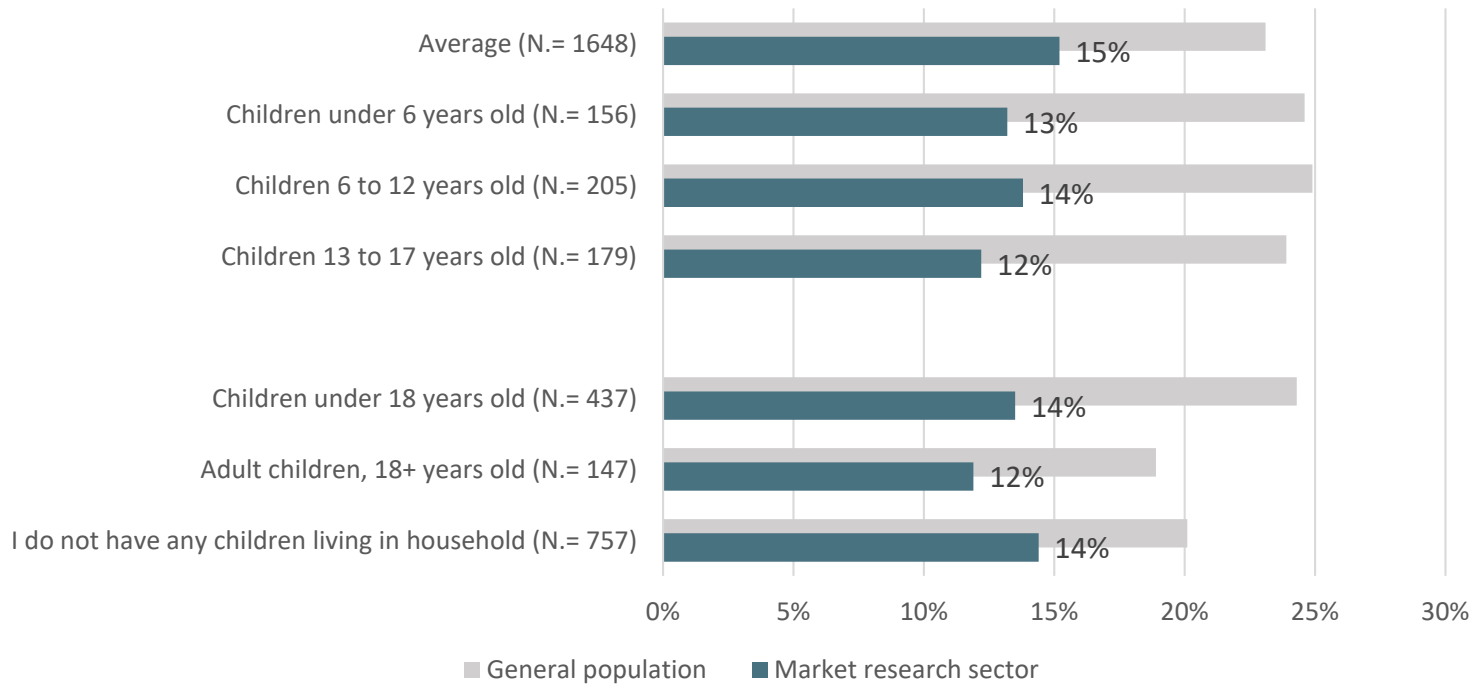
Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

In the MR sector, family status does not impact personal experience with discrimination, whereas amongst the general population, those with children are slightly more likely to have had such experience.

Personal Experience with Direct Discrimination in the Workplace

- % saying YES - Average across all factors - By Family Status



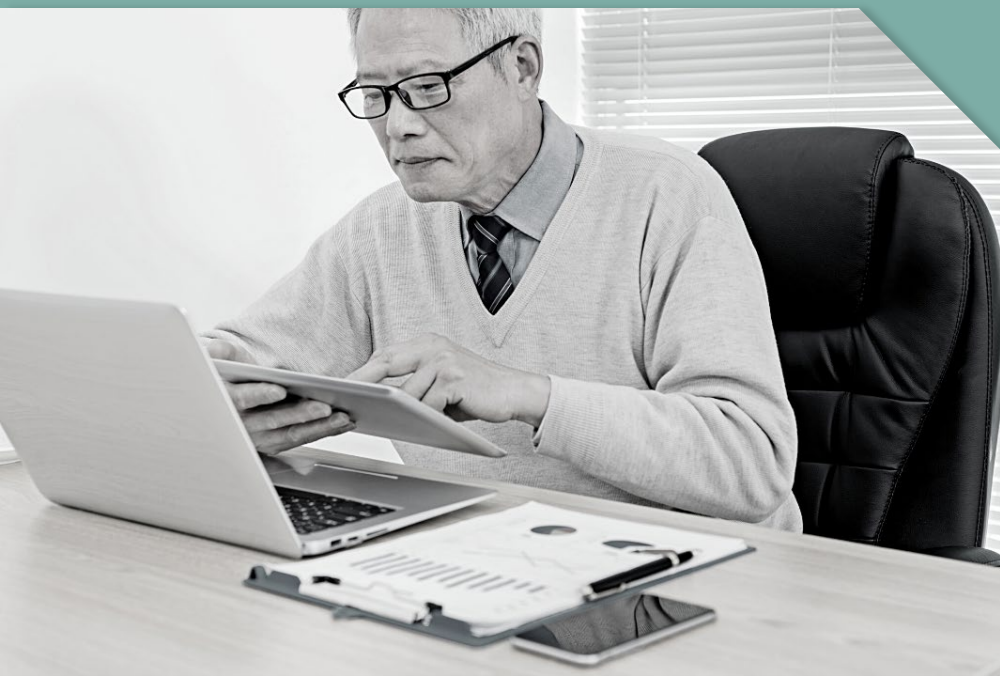
Base: Those who have more than 1 employee working in their company or are not self-employed.

Note: Data from the UK for Market research sector is for children aged 16 plus, and is not included in the detailed breakdown by the age of child shown here

Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

PERSONAL EXPERIENCE OF DIRECT DISCRIMINATION IN THE WORKPLACE BY REASON FOR DISCRIMINATION



This section of the report looks at people's personal experience with discrimination in their currently (most recent) place of work by the reason for discrimination.

The survey asked about this with respect to:

- Age
- Gender
- Sexual Orientation/gender identity
- Ethnicity/race/skin color [Except DE]
- National Origin [Except DE]
- Religion/faith/beliefs
- Family Status/caring responsibilities
- Disability/impairment/health condition
- Social Class [Except JP]

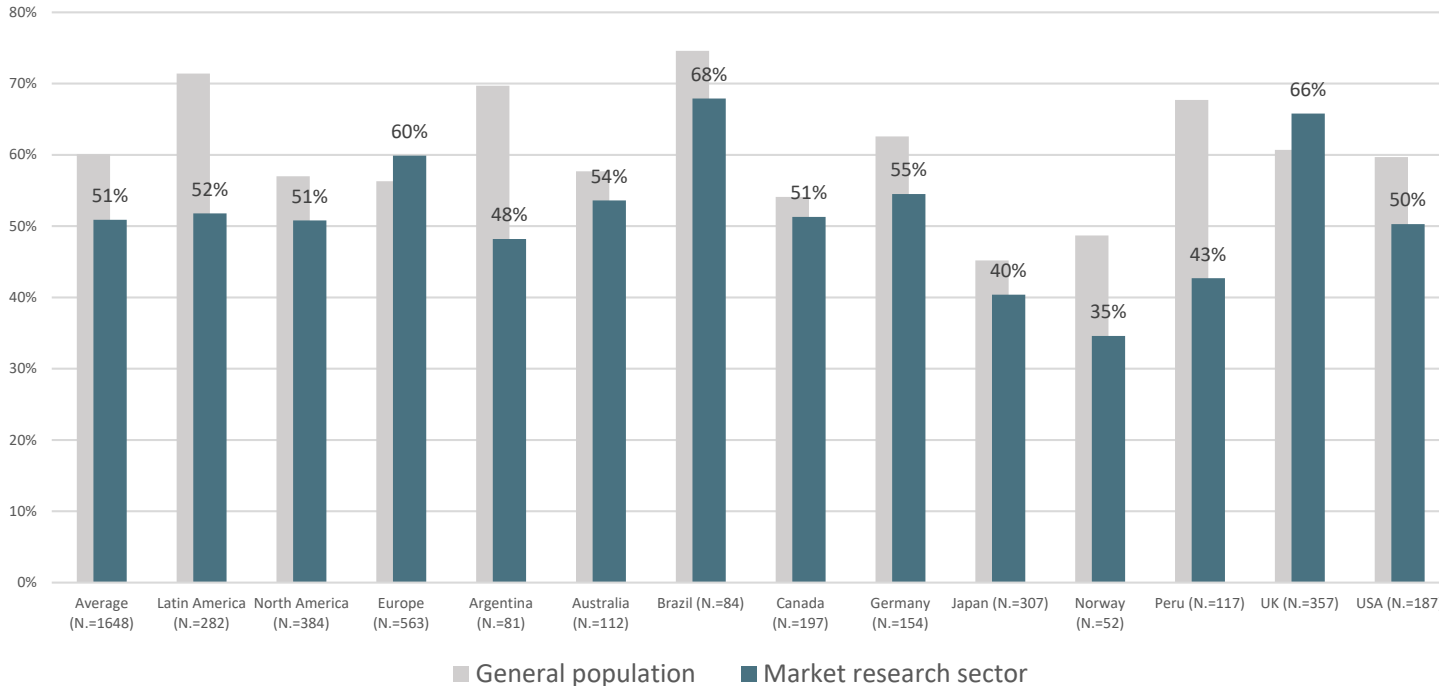
Using the scale:

- Yes
- No
- Prefer not to say
- Don't know

In this section, we deep dive into the data based on those who say 'YES'.

One-in-two people working in the MR sector have personal experience with direct discrimination in the workplace, which is somewhat lower than amongst the general population. Those working in the MR sector in Brazil and the UK are more likely than others to have experienced discrimination.

Personal Experience with Direct Discrimination in the Workplace because of ANY REASON - % saying Yes - By Country



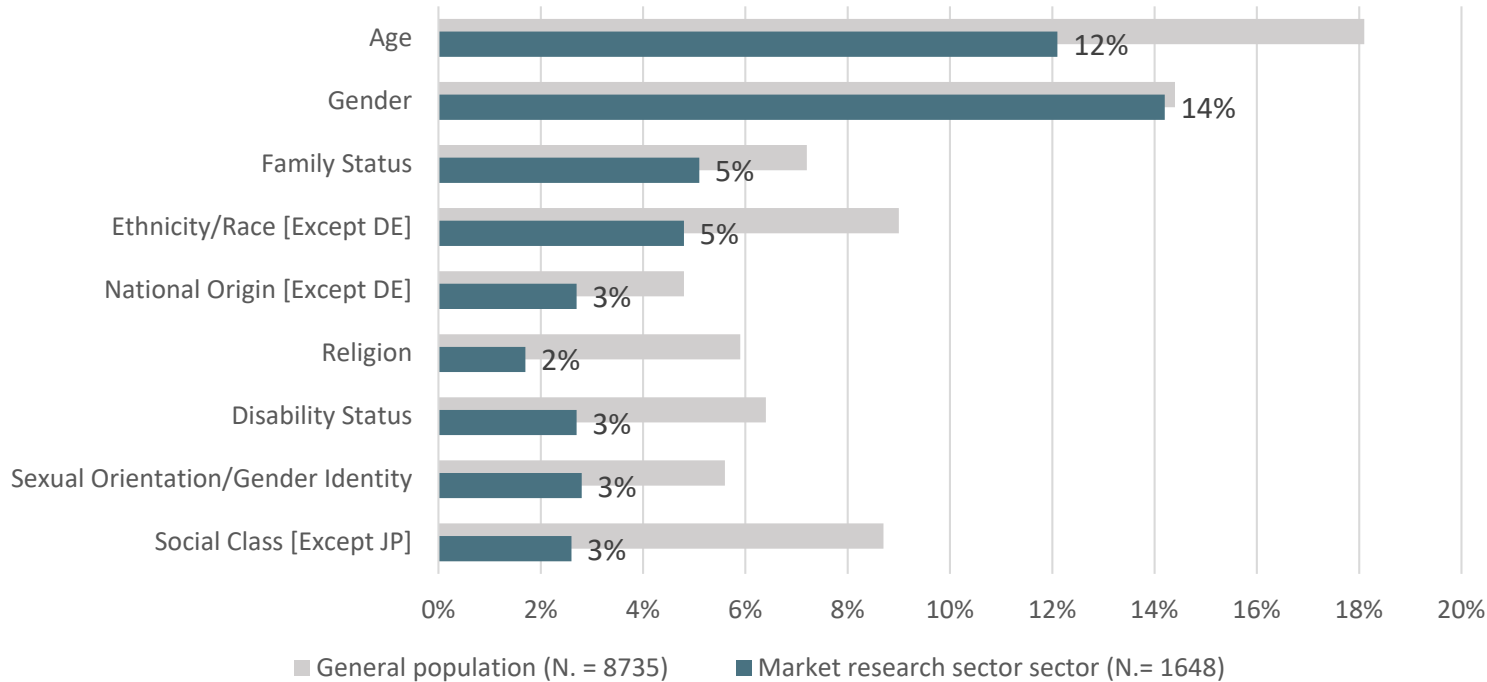
Base: Those who have more than 1 employee working in their company or are not self-employed.

Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

In the MR sector, age and gender are the most common reasons cited for discrimination. Whilst in general, personal experience with discrimination is lower in the MR sector than amongst the general population, this is not the case with respect to gender discrimination where it is equally prevalent in the MR sector as the general population.

Personal Experience with Direct Discrimination in the Workplace – By reason for discrimination:



Base: Those who have more than 1 employee working in their company or are not self-employed.

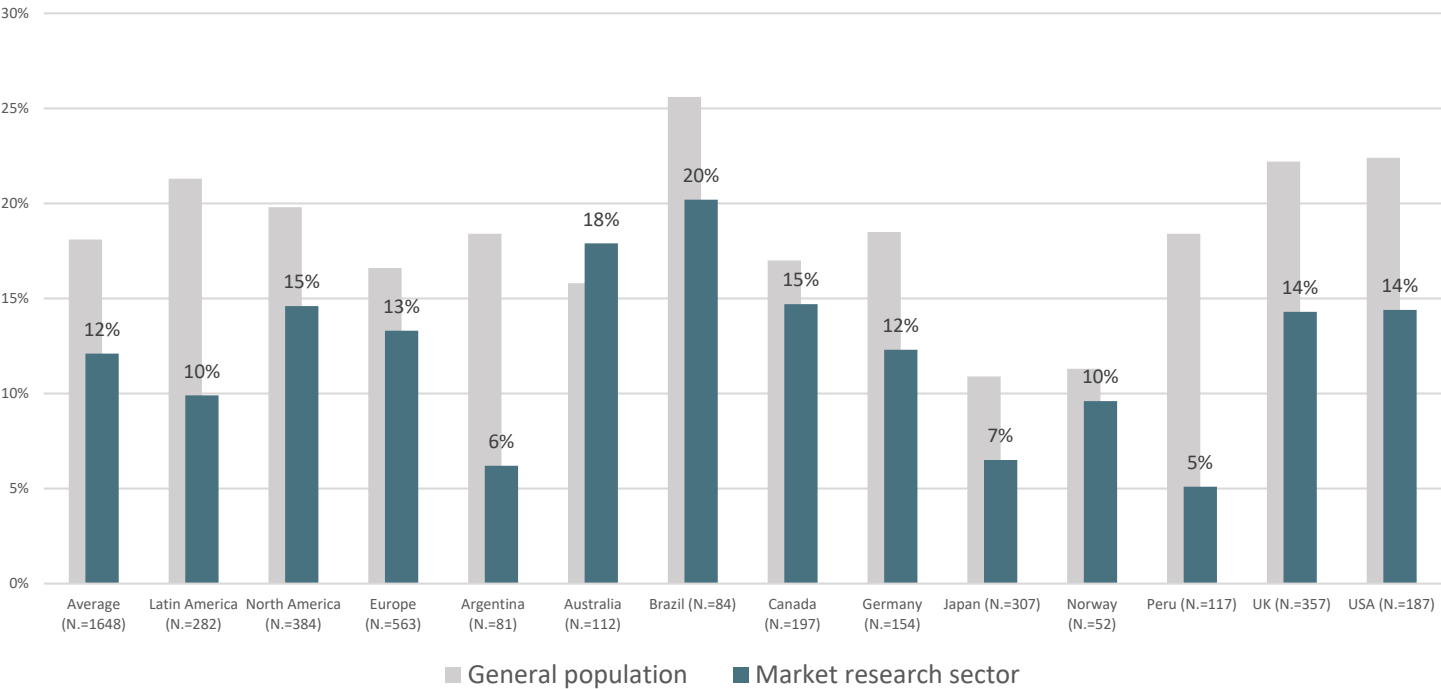
Average across countries.

In the MR sector, age discrimination is most prevalent in Brazil and Australia. In Australia the level of age discrimination in the MR sector surpasses that of the level amongst the general population. Age discrimination in the MR sector is lowest in Argentina, Peru and Japan, and in the first two of these countries, this is particularly noticeable compared to the level in the general population.



Personal Experience with Direct Discrimination in the Workplace because of AGE

- % saying Yes - By Country



Base: Those who have more than 1 employee working in their company or are not self-employed.

Base numbers shown for Market Research Sector only.

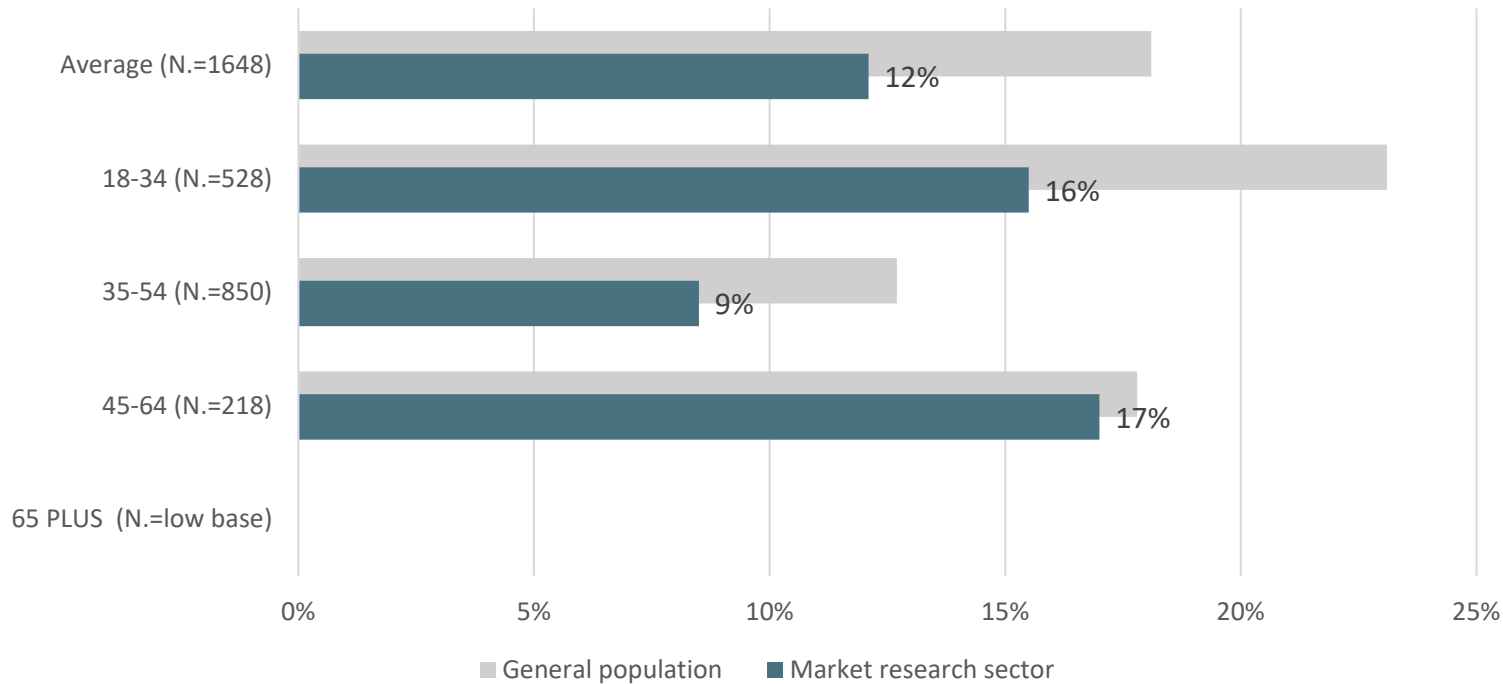
See Appendix for general population sample bases.

Both younger and older adults are more likely than middle aged people to have personal experience with discrimination because of age. Amongst the general population, it is in particular younger adults who have personal experience with discrimination due to age.

Personal Experience with Direct Discrimination in the Workplace because of

AGE

- % saying Yes – By Age Group



Base: Those who have more than 1 employee working in their company or are not self-employed.

Note: Market research sector in UK is based on 16+. All data in Japan is based on 20+.

Average across countries.

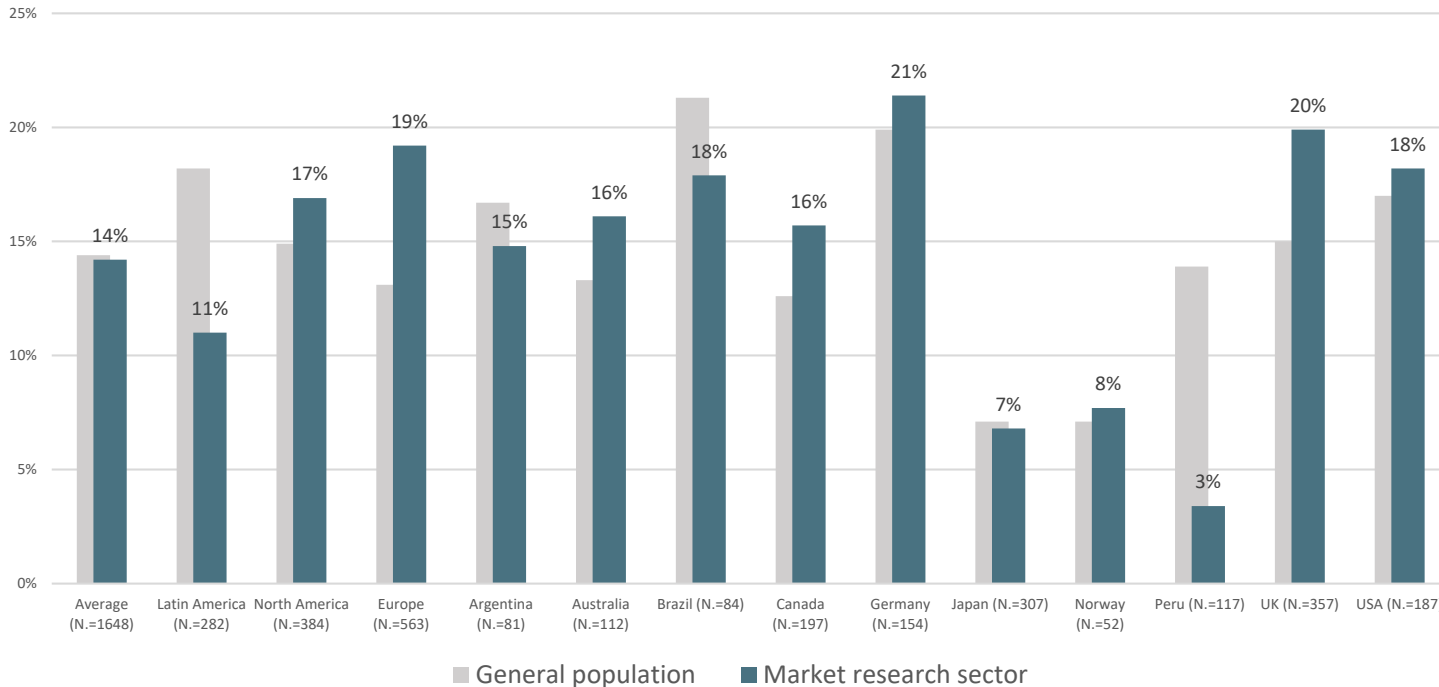
Base numbers shown for Market Research Sector only

See Appendix for general population sample bases.

Almost one-in-five people working in the MR sector in Europe or North America have had personal experience with gender discrimination. This is higher than in the general population in those regions. Personal experience with gender discrimination is low in Japan, Norway and Peru.

Personal Experience with Direct Discrimination in the Workplace because of GENDER

- % saying Yes - By Country



Base: Those who have more than 1 employee working in their company or are not self-employed.

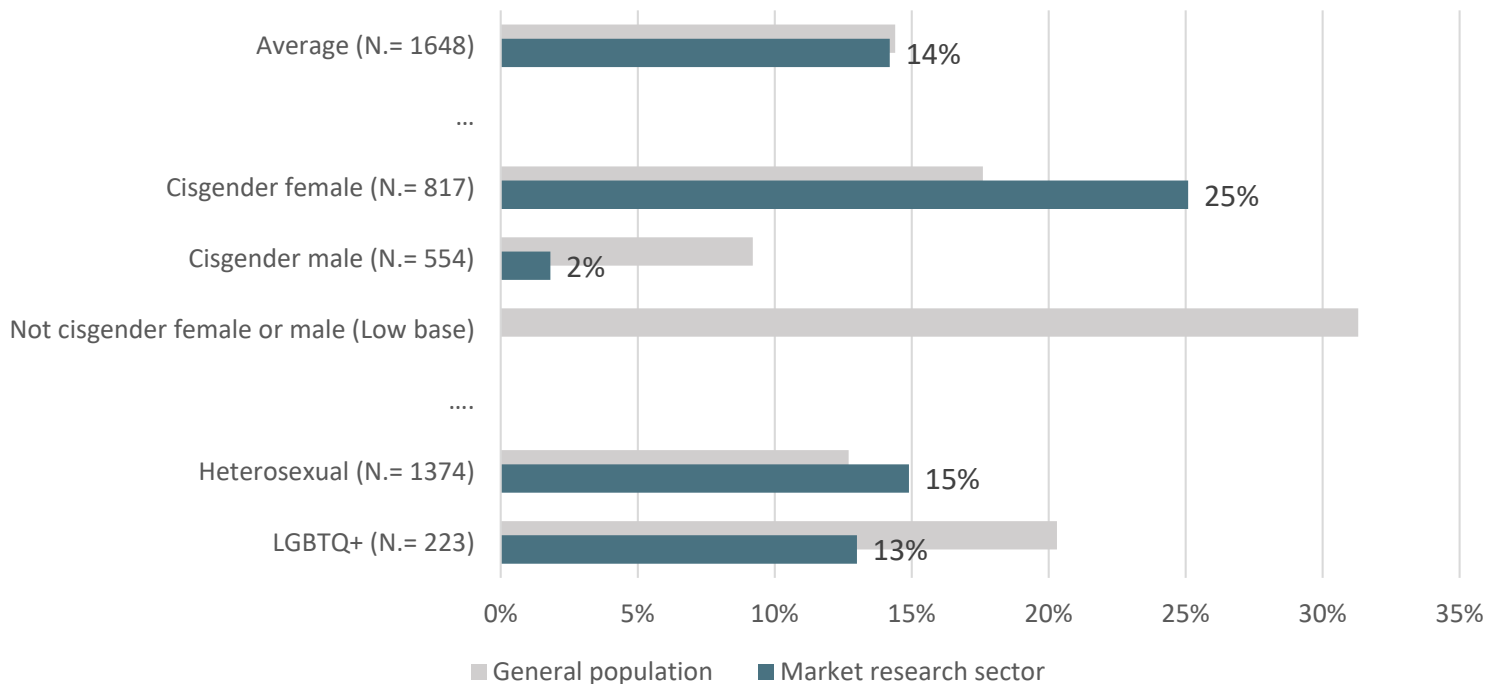
Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

One-in-four cisgender females working in the MR sector have had personal experience with gender discrimination in the workplace, which is significantly higher than in the general population. In contrast only one-in-twenty cisgender males working in the MR sector have had personal experience with gender discrimination in the workplace, which is significantly lower than in the general population.

Personal Experience with Direct Discrimination in the Workplace because of GENDER - % saying Yes –

By Gender Identity (excluding AU/PE) / Sexual Orientation (1)



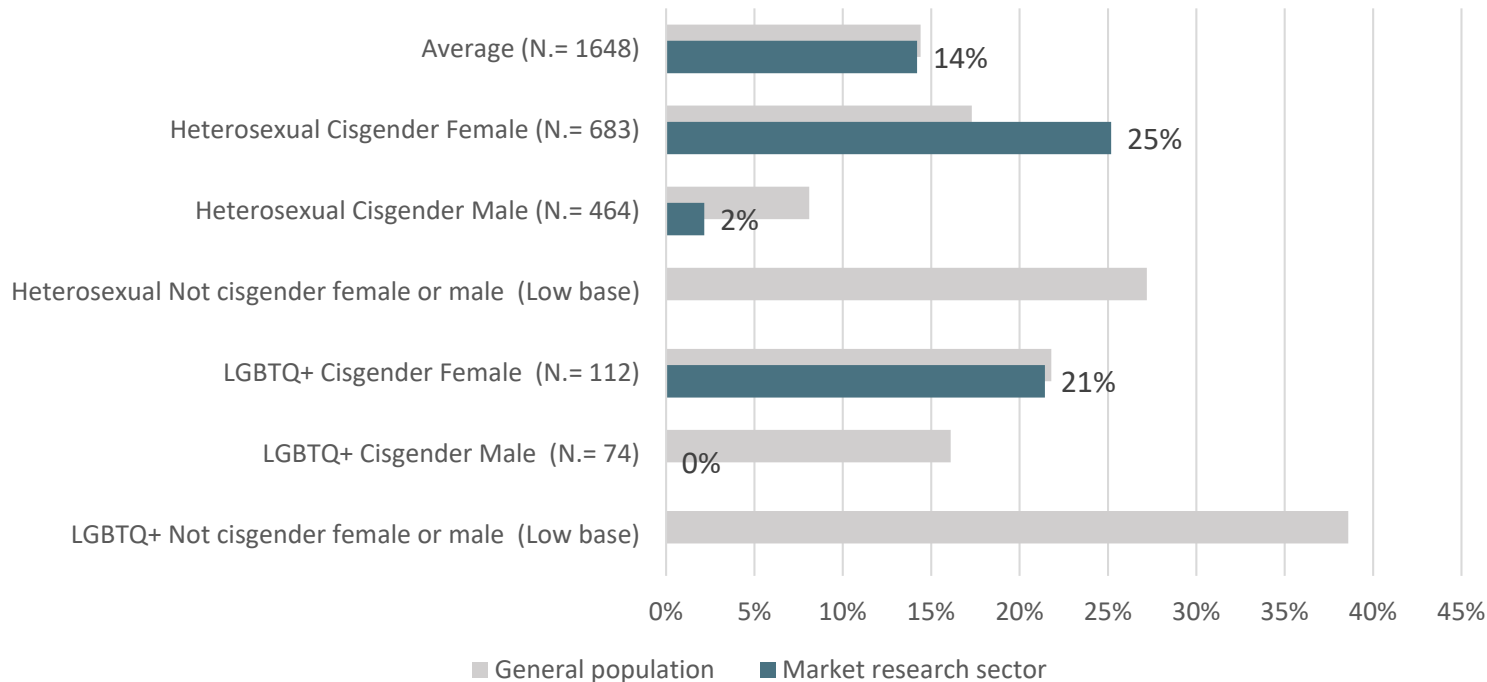
Base: Those who have more than 1 employee working in their company or are not self-employed.

Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

Personal Experience with Direct Discrimination in the Workplace because of GENDER

- % saying Yes -- Excluding AU/PE - By Gender Identity / Sexual Orientation (2)



Base: Those who have more than 1 employee working in their company or are not self-employed.

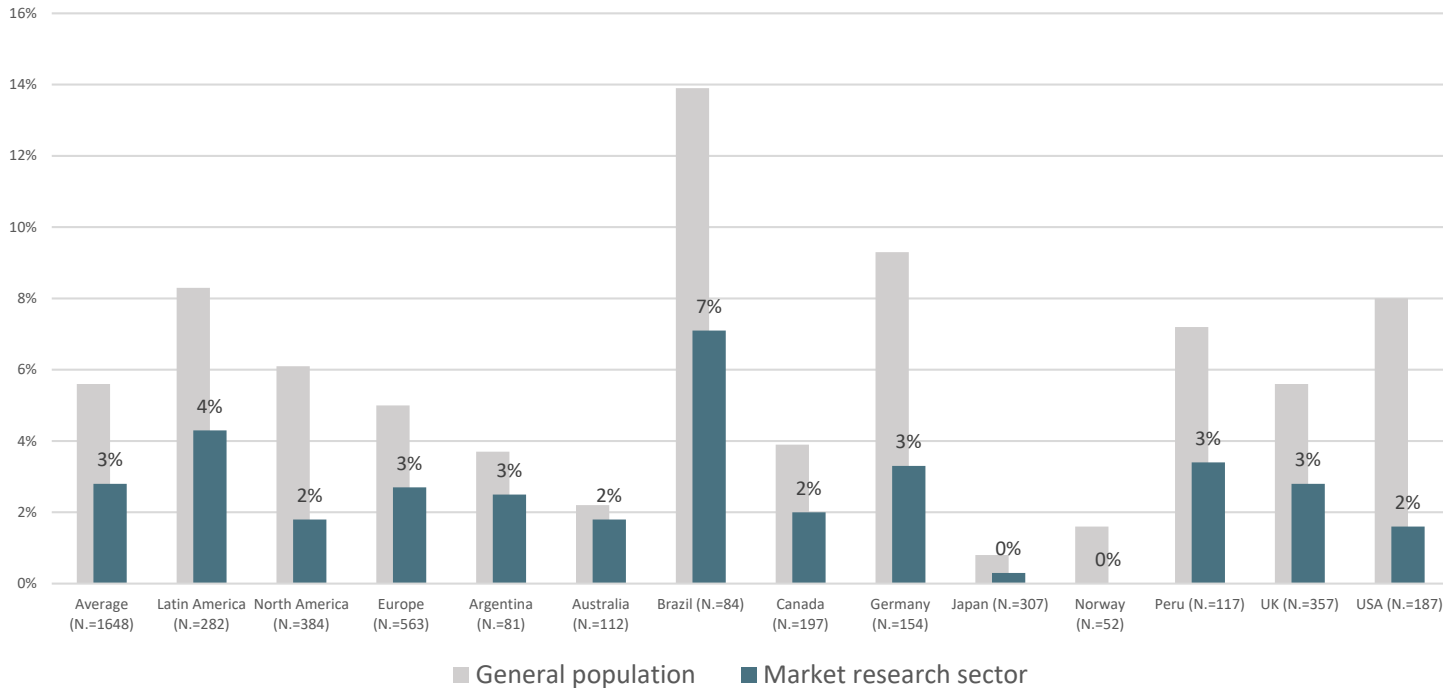
Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

Personal experience with sexual orientation / gender identity discrimination is low in the MR sector and much lower than amongst the general population.

Personal Experience with Direct Discrimination in the Workplace because of SEXUAL ORIENTATION/GENDER IDENTITY

- % saying YES - By Country



Base: Those who have more than 1 employee working in their company or are not self-employed.

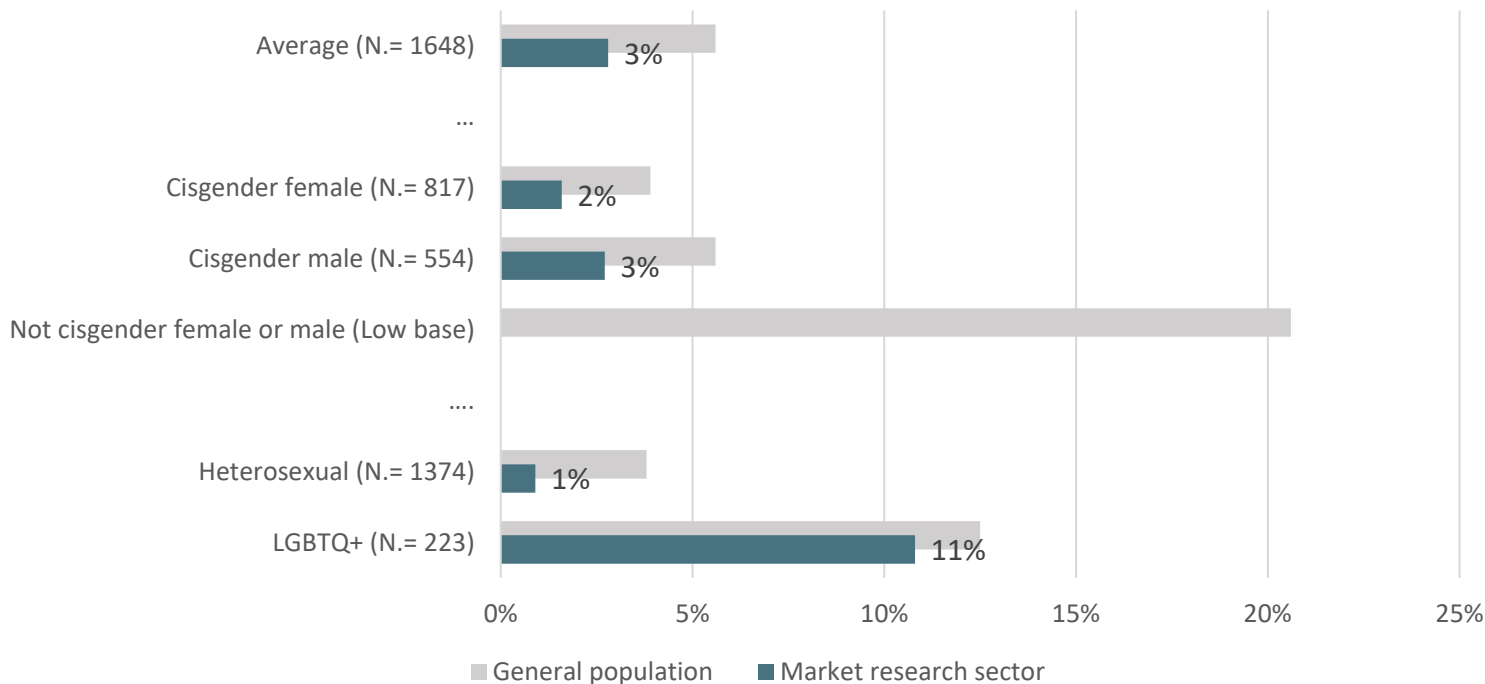
Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

One-in-ten LGBTQ+ people working in the MR sector have had personal experience with sexual orientation / gender identity discrimination in the workplace, which is similar to the proportion in the general population. Amongst the general public as many as one-in-five not cisgender males or females have had personal experience with sexual orientation / gender identity discrimination in the workplace.

Personal Experience with Direct Discrimination in the Workplace because of SEXUAL ORIENTATION / GENDER IDENTITY?

- % saying YES – By Gender Identity (excluding AU/PE) / Sexual Orientation (1)



Base: Those who have more than 1 employee working in their company or are not self-employed.

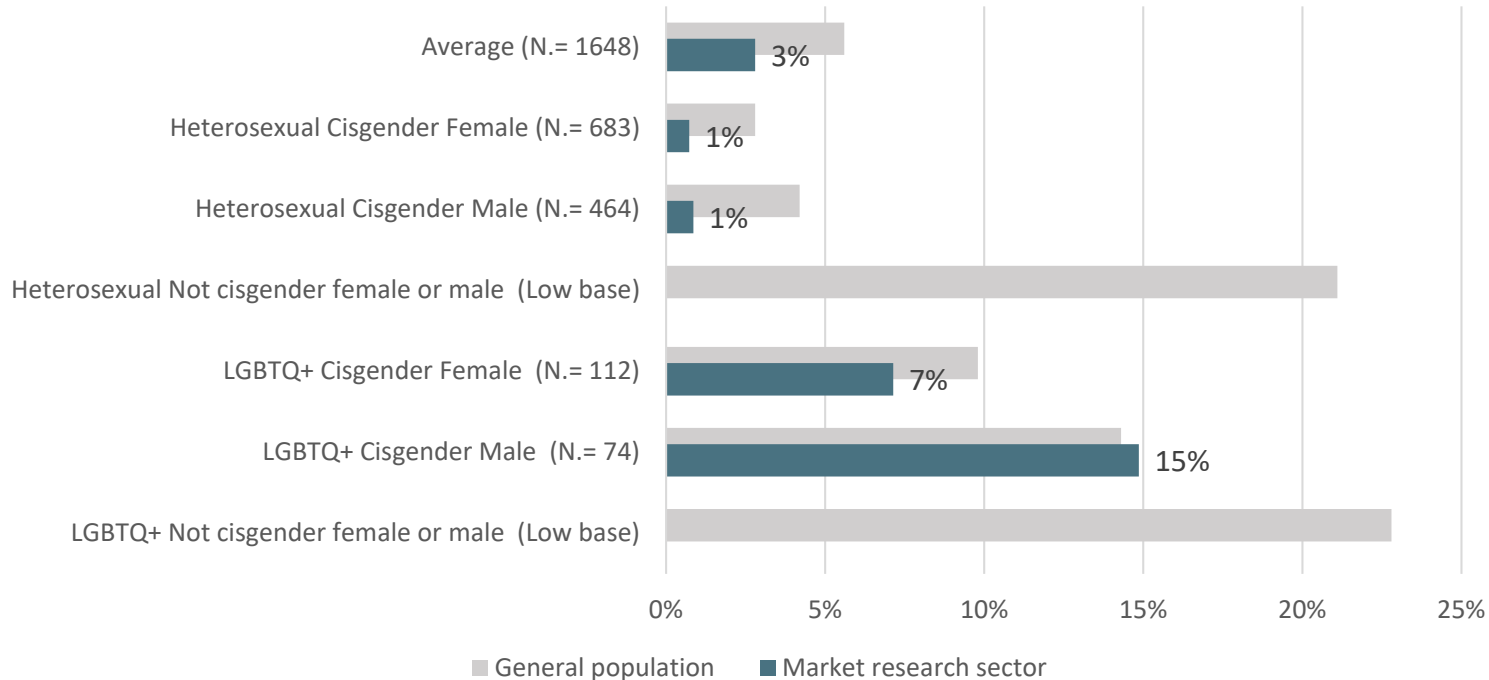
Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

Both in the MR sector as well as amongst the general population, LGBTQ+ males are ,more likely to have had personal experience with sexual orientation / gender identity discrimination in the workplace.

Personal Experience with Direct Discrimination in the Workplace because of SEXUAL ORIENTATION / GENDER IDENTITY?

- % saying YES – Excluding AU/PE - Gender Identity / Sexual Orientation (2)



Base: Those who have more than 1 employee working in their company or are not self-employed.

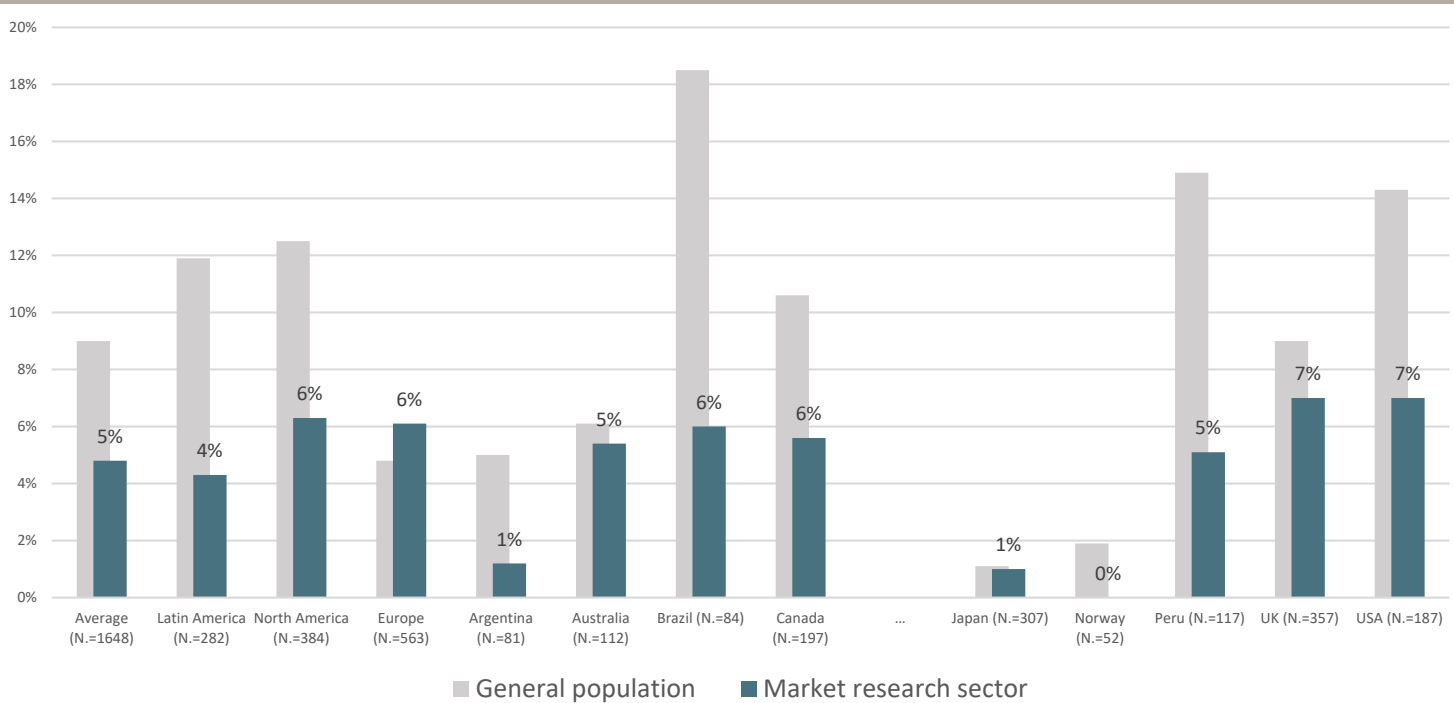
Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

Personal experience with discrimination due to ethnicity is low in the MR sector and lower than amongst the general population. The difference compared to the general population is most noticeable in Brazil, Peru and the USA.

Personal Experience with Direct Discrimination in the Workplace because of ETHNICITY

- % saying YES - By Country (excluding Germany)



Base: Those who have more than 1 employee working in their company or are not self-employed.

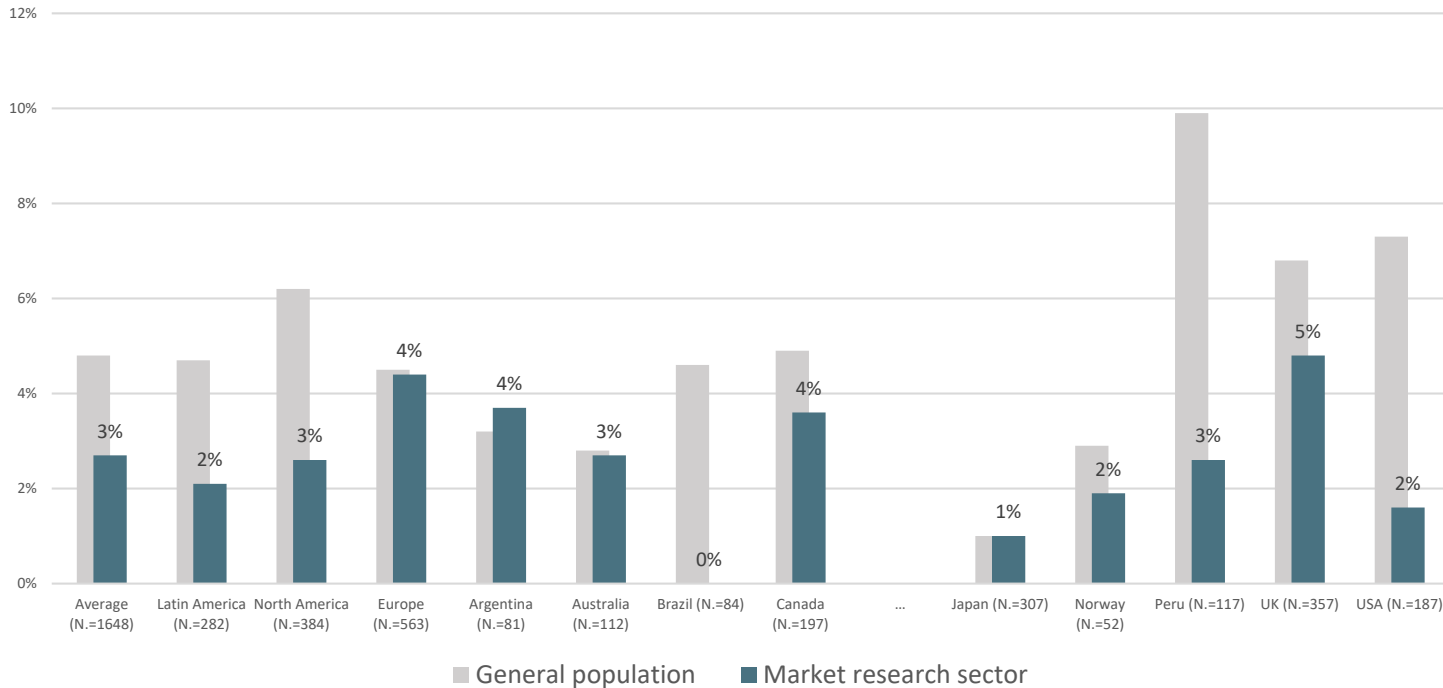
Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

The experiencing of discrimination due to national origin is low in the MR sector and lower than amongst the general population. Amongst the general public, it is highest in Peru, the UK and the USA.

Personal Experience with Direct Discrimination in the Workplace because of NATIONAL ORIGIN

- % saying YES - By Country (excluding Germany)



Base: Those who have more than 1 employee working in their company or are not self-employed.

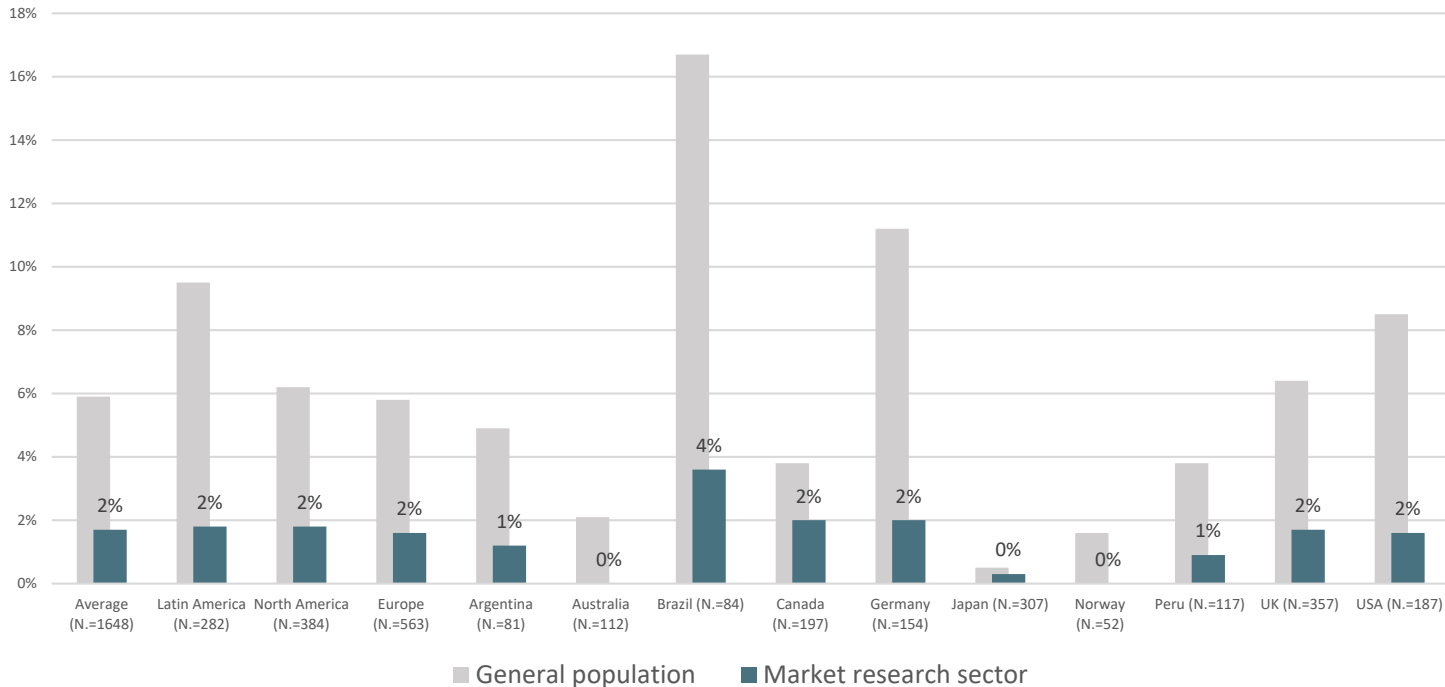
Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

Personal experience with discrimination due to religion is very low in the MR sector and much lower than amongst the general population. The difference compared to the general population is most noticeable in Brazil and Germany.

Personal Experience with Direct Discrimination in the Workplace because of RELIGION

- % saying YES - By Country



Base: Those who have more than 1 employee working in their company or are not self-employed.

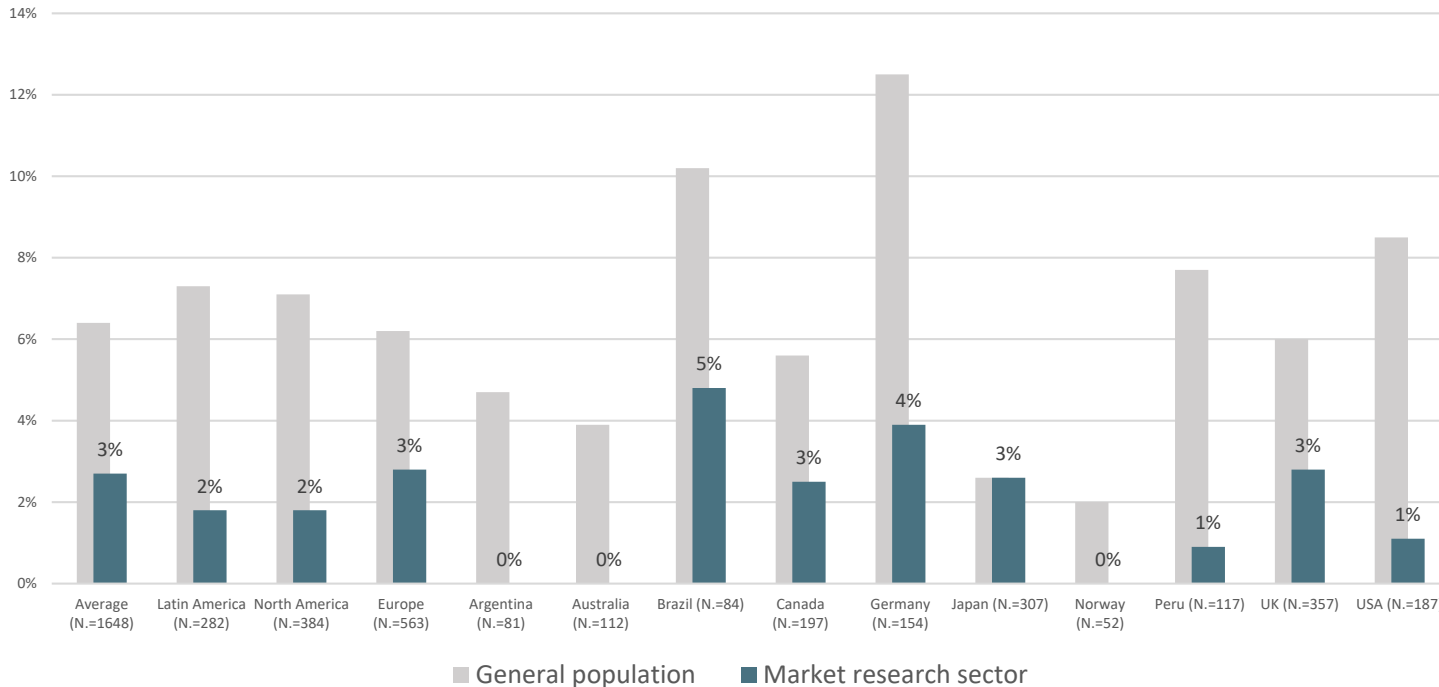
Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

Personal experience with discrimination due to disability status is low in the MR sector and much lower than amongst the general population. Amongst the general population Germany stands out as the country where personal experience with discrimination due to disability status is highest.

Personal Experience with Direct Discrimination in the Workplace because of DISABILITY STATUS

- % saying YES - By Country



Base: Those who have more than 1 employee working in their company or are not self-employed.

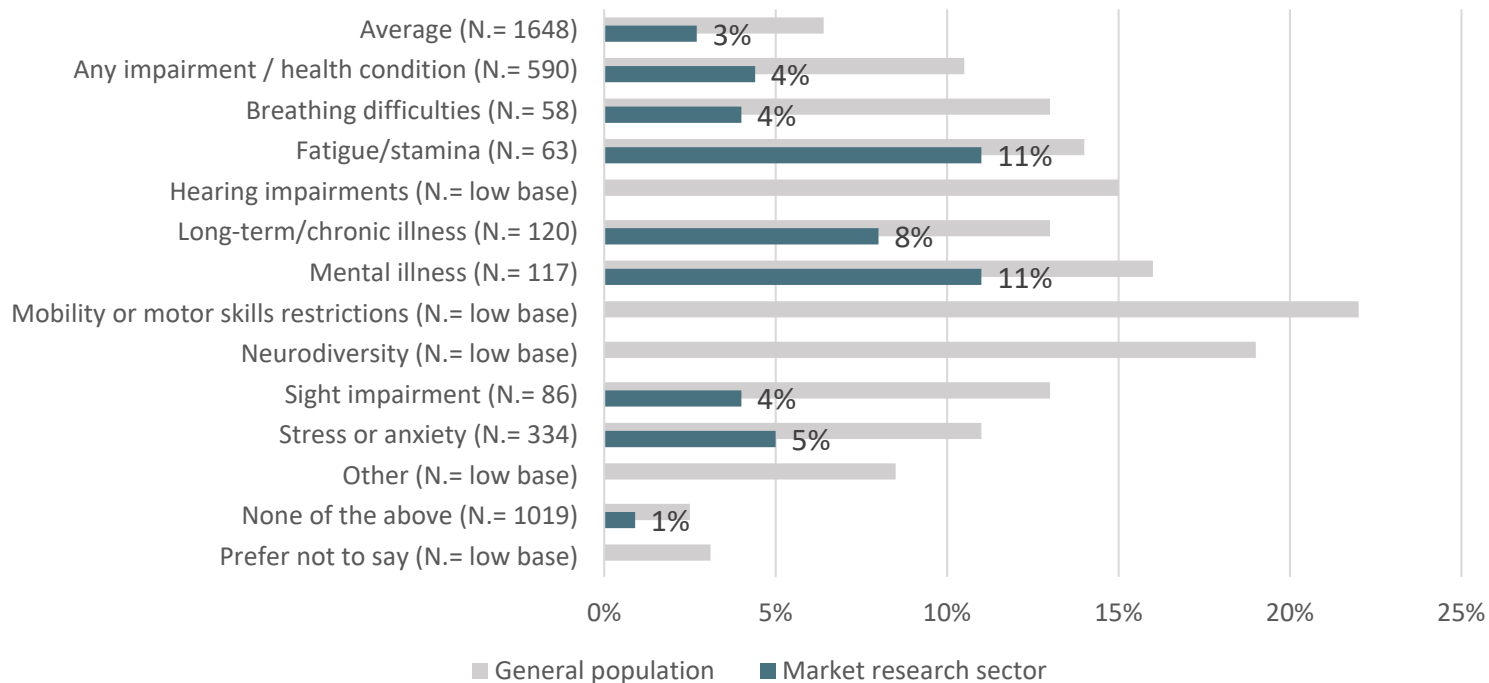
Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

In the MR sector it is people with fatigue, mental illness and long-term illness who are most likely to have personal experience with discrimination due to disability status. Amongst the general population, it is people with mobility restrictions and neurodiversity who have the most personal experience with discrimination due to disability status.

Personal Experience with Direct Discrimination in the Workplace because of DISABILITY STATUS

- % saying YES - By Impairments / Health Conditions



Base: Those who have more than 1 employee working in their company or are not self-employed.

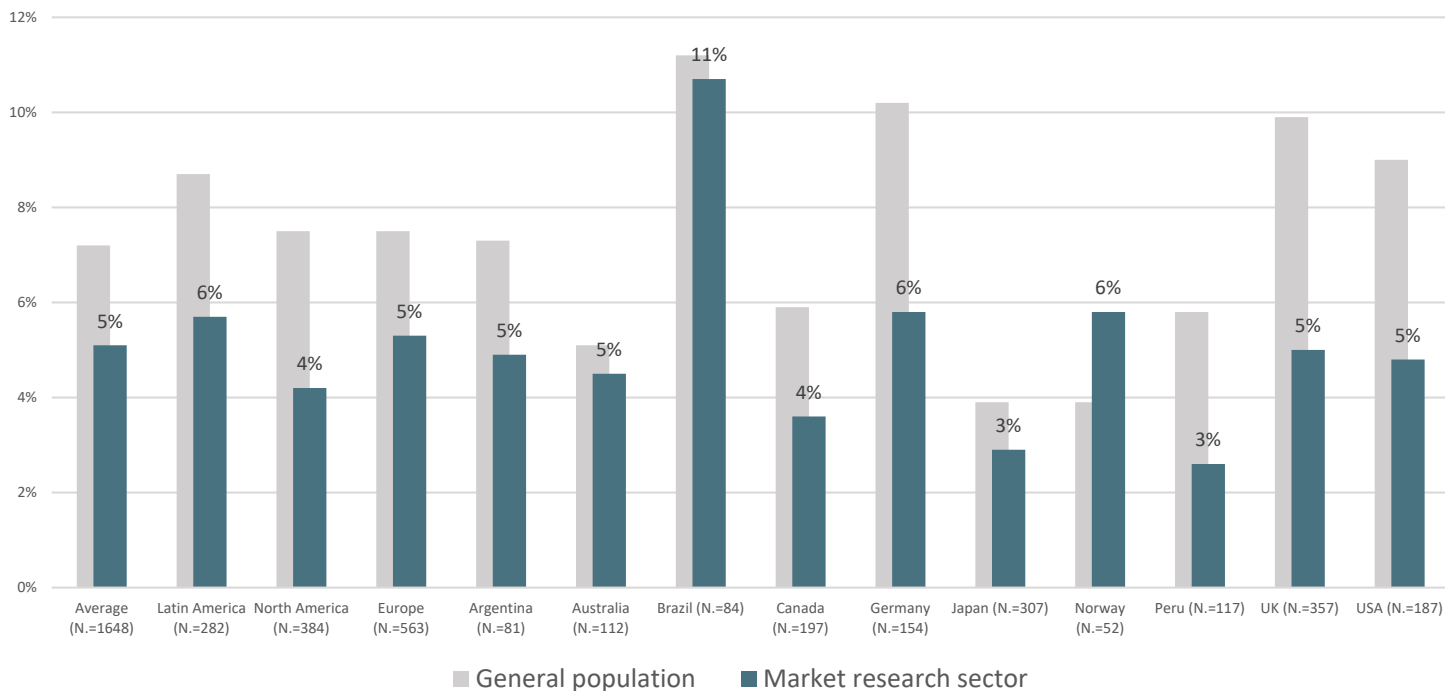
Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

One-in-twenty people in the MR sector have had personal experience with discrimination due to their family status. The proportion is similar across all countries except Brazil where it is double.

Personal Experience with Direct Discrimination in the Workplace because of FAMILY STATUS

- % saying YES - By Country



Base: Those who have more than 1 employee working in their company or are not self-employed.

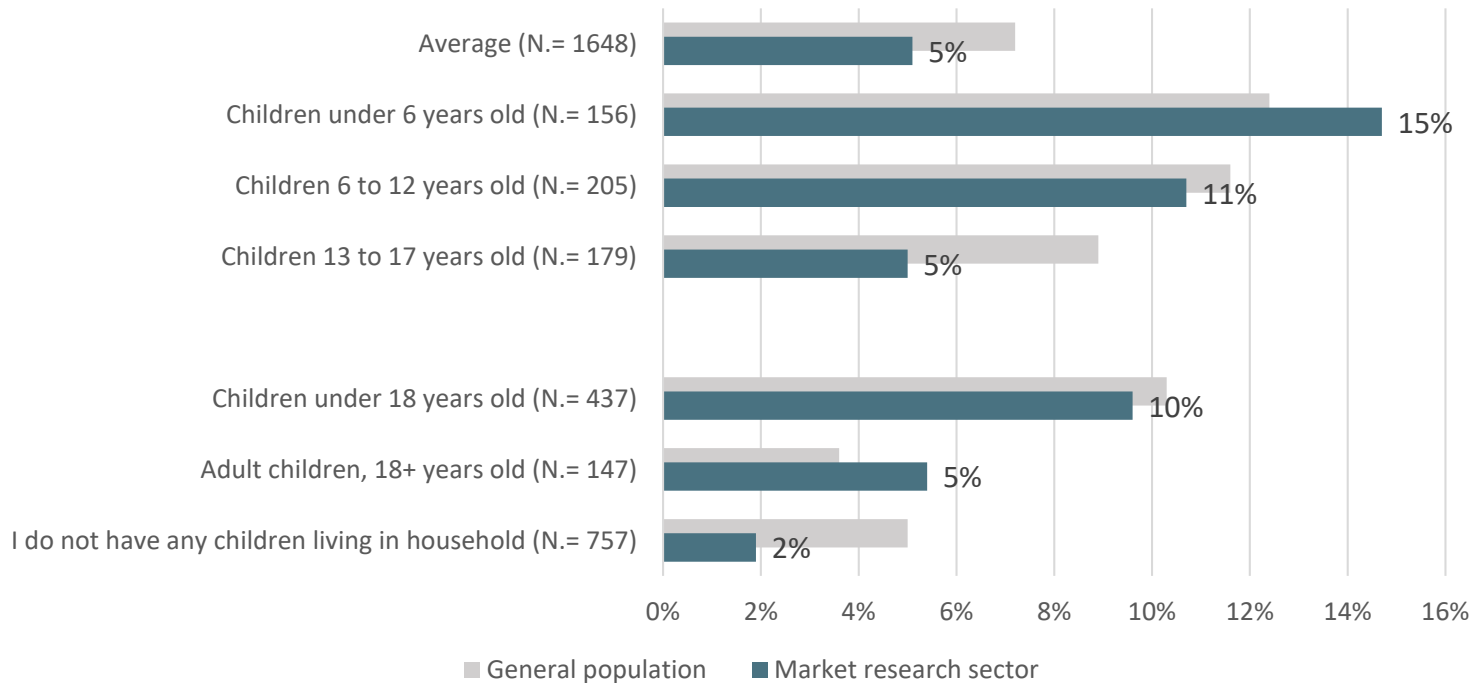
Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

15% of people working in the MR sector who have children under 6 say they have personal experience with discrimination due to family status, which is three times the average.

Personal Experience with Direct Discrimination in the Workplace because of FAMILY STATUS

- % saying YES - By Family Status



Base: Those who have more than 1 employee working in their company or are not self-employed.

Note: Data from the UK for Market research sector is for children aged 16 plus, and is not included in the detailed breakdown by the age of child shown here

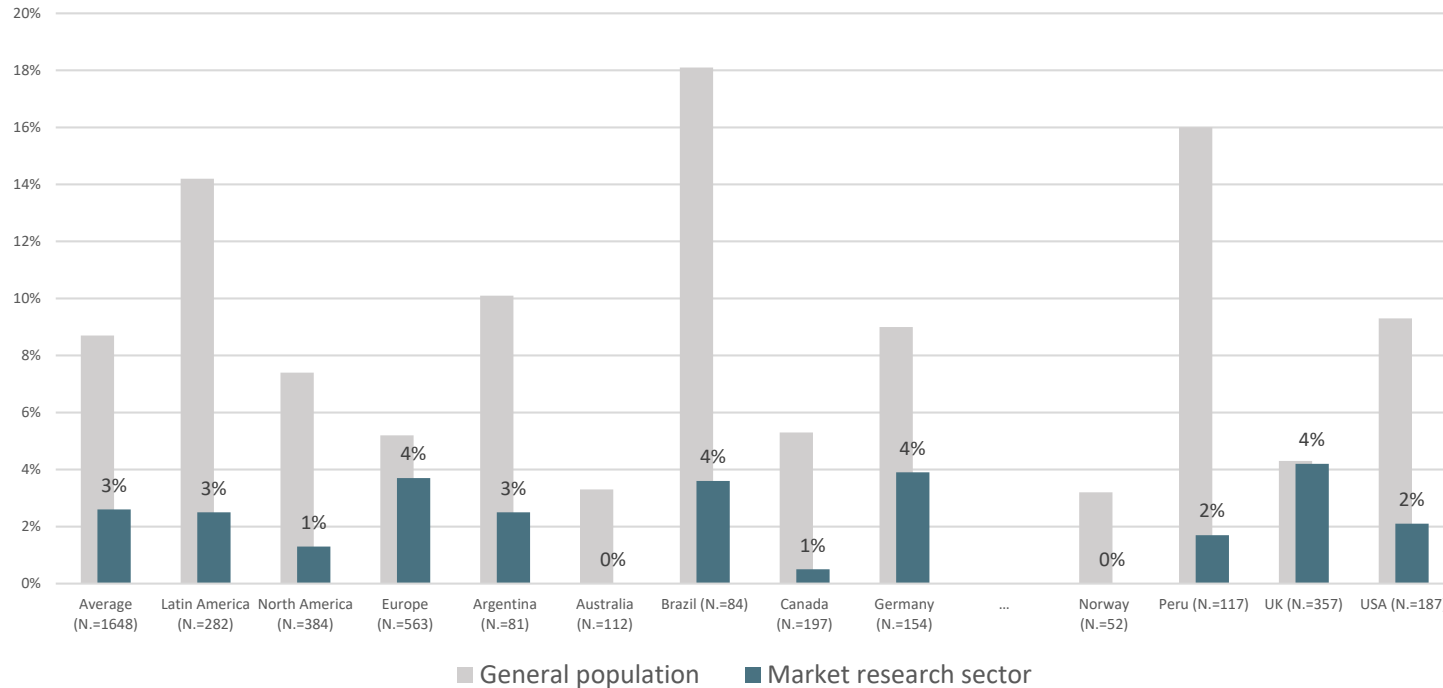
Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

Personal experience with discrimination due to social status is low in the MR sector and much lower than amongst the general population. The difference compared to the general population is most noticeable in Latin America.

Personal Experience with Direct Discrimination in the Workplace because of SOCIAL STATUS

- % saying YES - By Country (excluding Japan)



Base: Those who have more than 1 employee working in their company or are not self-employed.

Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.



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WITNESSING OF DIRECT
DISCRIMINATION IN THE
WORKPLACE

WITNESSING OF DIRECT DISCRIMINATION IN THE WORKPLACE

This section of the report looks at people's witnessing of discrimination in their current (most recent) place of work through two different lens:

- The type of discrimination
- Reasons for discrimination



KEY FINDINGS

WITNESSING OF DIRECT DISCRIMINATION IN THE WORKPLACE - BY TYPE OF DISCRIMINATION

Almost one in two people working in the MR sector have witnessed direct discrimination in the workplace, which is marginally lower than amongst the general population (47 vs 53%). It is in particular with respect to harassment that people working in the MR sector are the least likely when compared those in the general working population to have witnessed discrimination.

Based on the average across all factors, the witnessing of direct discrimination in the MR sector is highest in Brazil and the UK, and lowest in Japan, Norway and Peru.

Just over one-in-five (22%) of people working in the MR sector have witnessed **unfair treatment by the organization**, which compares to 29% amongst the general population, and one-in-five have witnessed a **negative colleague environment**, which compares to one-in-four amongst the general population.

Relative to the general population, people working in the MR sector in Argentina and Peru are much less likely to have witnessed either unfair treatment or a negative colleague environment.

People working in the MR sector are much less likely to have witnessed **harassment** than people working in other sectors (9 vs 18%). By country, the witnessing of harassment in the MR sector is relatively high in Brazil,

whilst low in Norway and Peru.

WITNESSING OF DIRECT DISCRIMINATION IN THE WORKPLACE - BY REASON FOR DISCRIMINATION

Both in the MR sector and in other sectors, gender, age and ethnicity are the most common reasons cited for witnessed discrimination in the workplace (14, 10 and 8% respectively in the MR sector).

THE WITNESSING OF DIRECT DISCRIMINATION IN THE WORKPLACE DUE TO AGE

One-in-ten people working in the MR sector has witnessed age discrimination at work, which is lower than amongst the general public (15%).

In the MR sector, the witnessing of age discrimination is most prevalent in Brazil. Witnessed age discrimination in the MR sector is almost non-existent in Peru, whilst in that country it is very prevalent amongst the general population.

Younger adults are slightly more likely to have witnessed discrimination because of age, especially in the general population.

THE WITNESSING OF DIRECT DISCRIMINATION IN THE WORKPLACE DUE TO GENDER, GENDER IDENTITY OR SEXUAL ORIENTATION

Witnessing gender discrimination in the workplace is similarly prevalent inside and outside of the MR sector at around 15%.

KEY FINDINGS

This figure rises to almost one-in-four amongst people working in the MR sector in Brazil, Germany and the UK, which is higher than in the general population in those countries. The witnessing of gender discrimination is very low in Japan, Norway and Peru, especially in the MR sector in those countries.

One-in-five cisgender females working in the MR sector have witnessed gender discrimination in the workplace, which is significantly higher than in the general population, and double the proportion amongst cisgender males in the sector. LGBTQ+ people working in the MR sector are also more likely than their heterosexual colleagues to have witnessed gender discrimination in the workplace.

The witnessing of sexual orientation / gender identity discrimination is low in the MR sector and lower than amongst the general population (3 vs 6%). The exception is Brazil, where more than one-in-ten people both in and outside of the MR sector say they have witnessed discrimination due to sexual orientation / gender identity

Amongst the general public, the witnessing of sexual orientation / gender identity discrimination is particularly high amongst not cisgender people (reaching almost one-in-five). In the MR sector, one-in-twenty LGBTQ+ people have witnessed sexual orientation / gender identity discrimination in the workplace, more than twice the proportion of heterosexual people.

Amongst the general public, the witnessing of sexual orientation / gender identity discrimination is particularly high amongst LGBTQ+ not cisgender people, reaching over one-in-five.

THE WITNESSING OF DIRECT DISCRIMINATION IN THE WORKPLACE DUE TO ETHNICITY OR NATIONAL ORIGIN

Around one-in-ten people both in and outside of the MR sector have witnessed discrimination in the workplace due to ethnicity. In Argentina, Japan, Norway and Peru, few people in the MR sector have witnessed discrimination in the workplace due to ethnicity.

The witnessing of discrimination due to national origin is low in the MR sector and lower than amongst the general population (3 vs 6%).

THE WITNESSING OF DIRECT DISCRIMINATION IN THE WORKPLACE DUE TO RELIGION

The witnessing of discrimination in the workplace due to religion is very low in the MR sector and much lower than amongst the general population (2 vs. 6%). Amongst the general population such discrimination is most witnessed in Brazil, Germany and the USA.

THE WITNESSING OF DIRECT DISCRIMINATION IN THE WORKPLACE DUE TO DISABILITY STATUS

The witnessing of discrimination due to disability status is low in the MR sector and much lower than amongst the general population (3 vs 6%). Amongst the general population, as well as in the MR sector, Germany stands out as the country where the witnessing of personal experience with discrimination due to disability status is highest (12 and 6% respectively).

KEY FINDINGS

THE WITNESSING OF DIRECT DISCRIMINATION IN THE WORKPLACE DUE TO FAMILY STATUS

The witnessing of discrimination at work due to family status is much lower in the MR sector than amongst the general public (4 vs 7%).

6% of people working in the MR sector who have children under 6 say they have witnessed discrimination due to family status.

THE WITNESSING OF DIRECT DISCRIMINATION IN THE WORKPLACE DUE TO SOCIAL STATUS

The witnessing of discrimination in the workplace due to social status is low in the MR sector and lower than amongst the general population (5 vs 9%). Such discrimination in the MR sector is most noticeable in Brazil.

WITNESSING OF DIRECT DISCRIMINATION IN THE WORKPLACE BY TYPE OF DISCRIMINATION

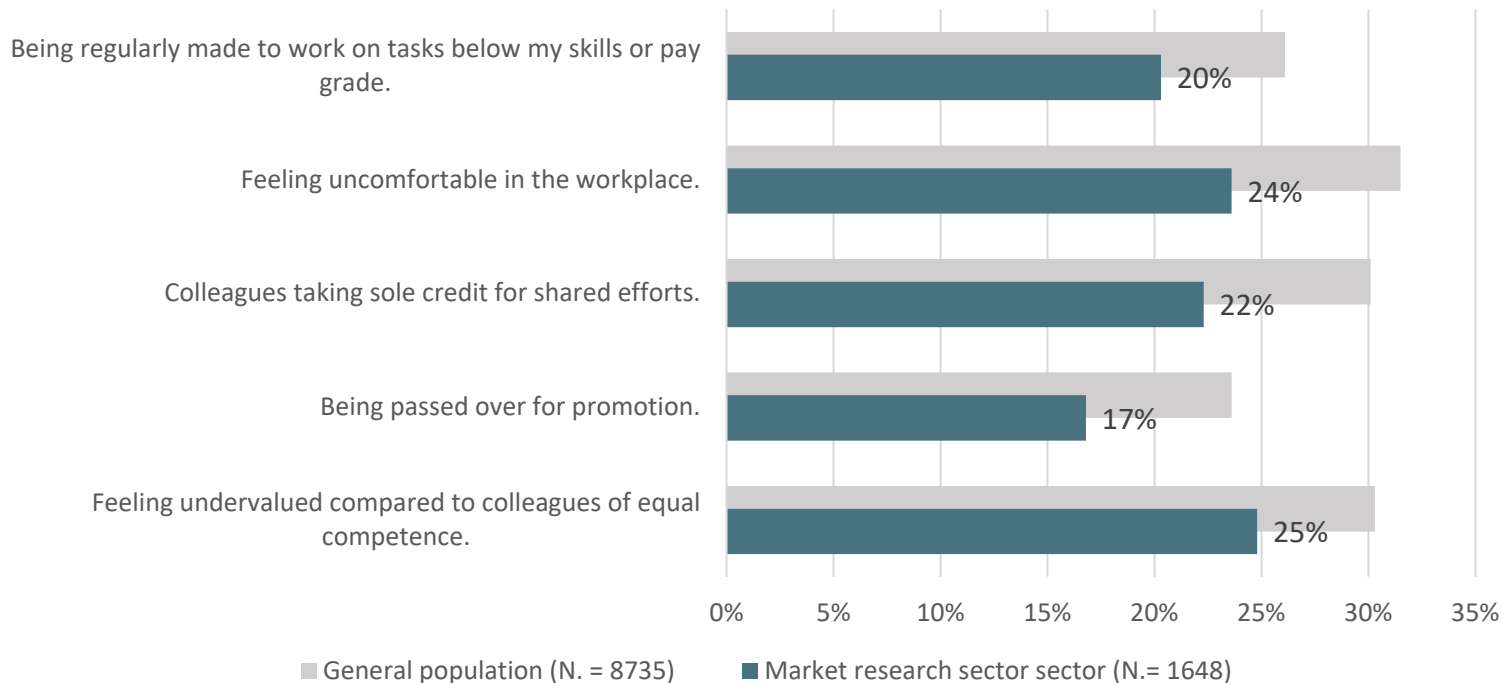


This section of the report looks at people's witnessing of discrimination in their currently (most recent) place of work by the type of discrimination.

The survey asked about 10 specific types of discrimination, from which three factors have been created in order to sharpen the analysis.

A significant proportion of people working in the MR sector have witnessed direct discrimination in the workplace in a number of different ways, although the proportions are somewhat less across the board when compared to the general working population.

Witnessing of Direct Discrimination in the Workplace- % saying YES - By Statement (2)

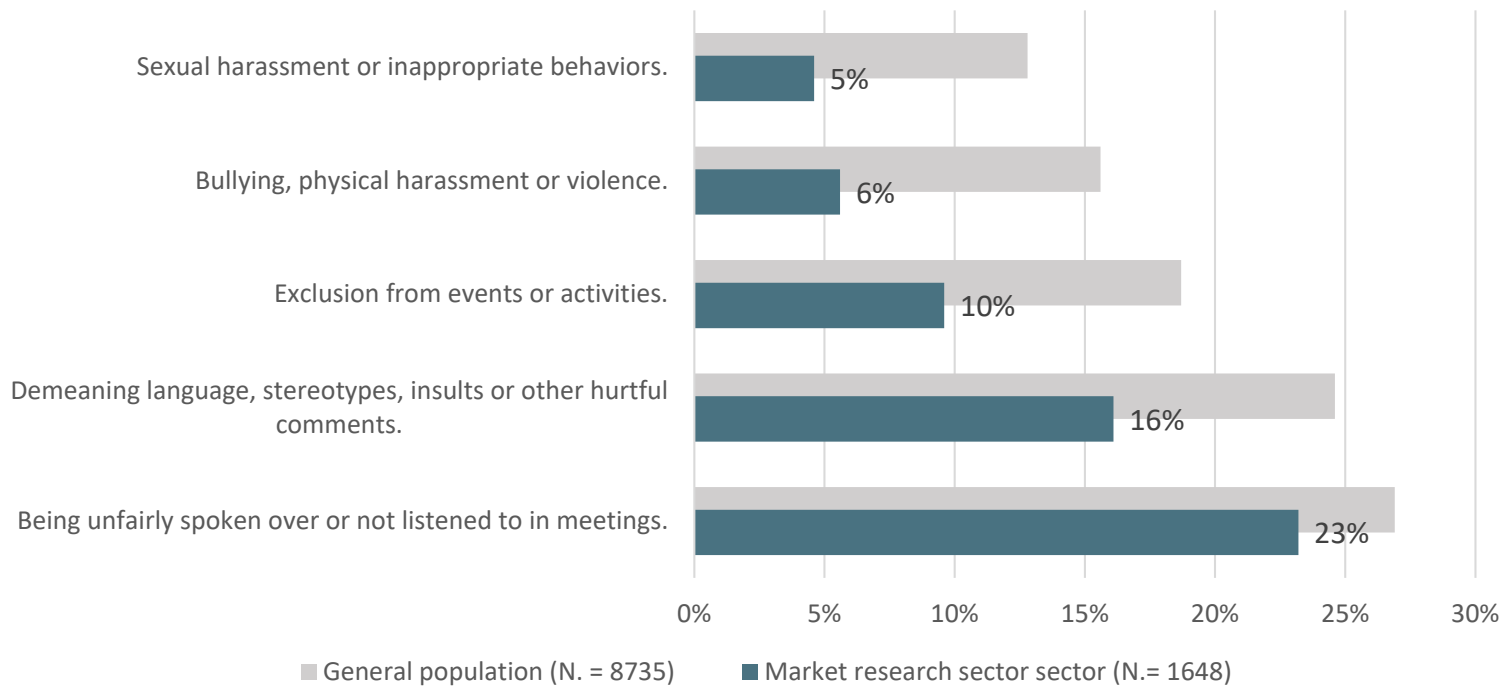


Base: Those who have more than 1 employee working in their company or are not self-employed.

Average across countries.

People working in the MR sector are much less likely than the general working population to have witnessed direct discrimination in the workplace, although more than one-in-four of those working in the MR sector do claim to have personal experience with being unfairly spoken over or not listened to in meetings

Witnessing of Direct Discrimination in the Workplace- % saying YES - By Statement (1)



Base: Those who have more than 1 employee working in their company or are not self-employed.

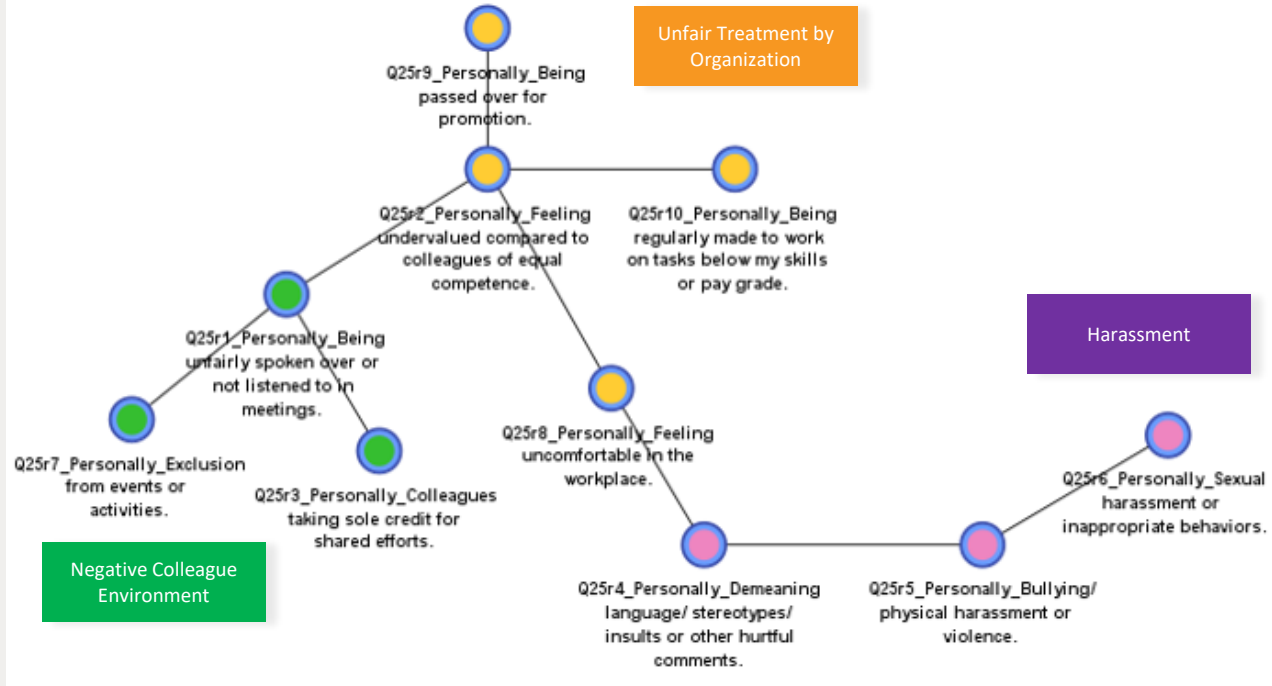
Average across countries.

Discrimination Factor Analysis

In order to assist with the analysis of the discrimination data a factor analysis was run on the data from the 10 statements from the general population survey.

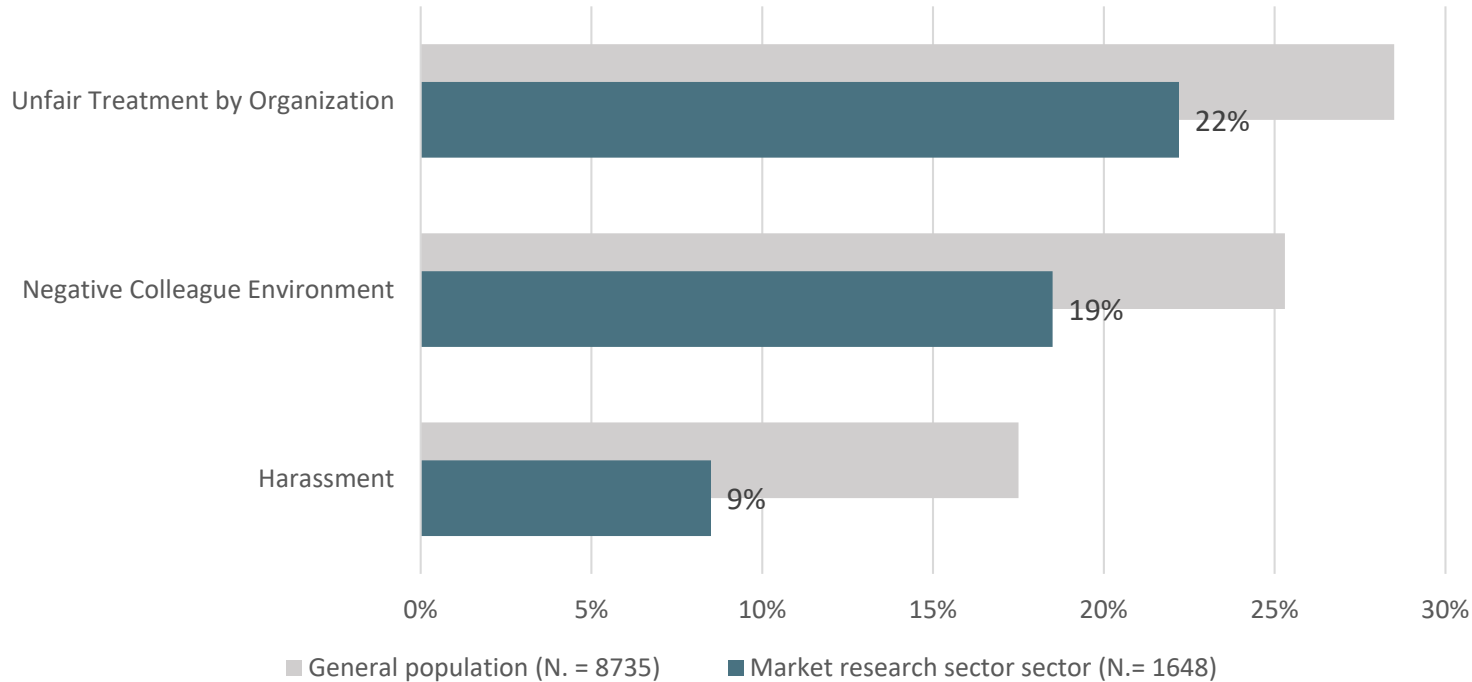
The analysis produced 3 factors as shown opposite.

We would like to thank RTi Research for conducting this factor analysis.



People working in the MR sector are less likely than the general working population to have witnessed direct discrimination in the workplace, especially when it comes to harassment.

Witnessing of Direct Discrimination in the Workplace- % saying YES - By Factor

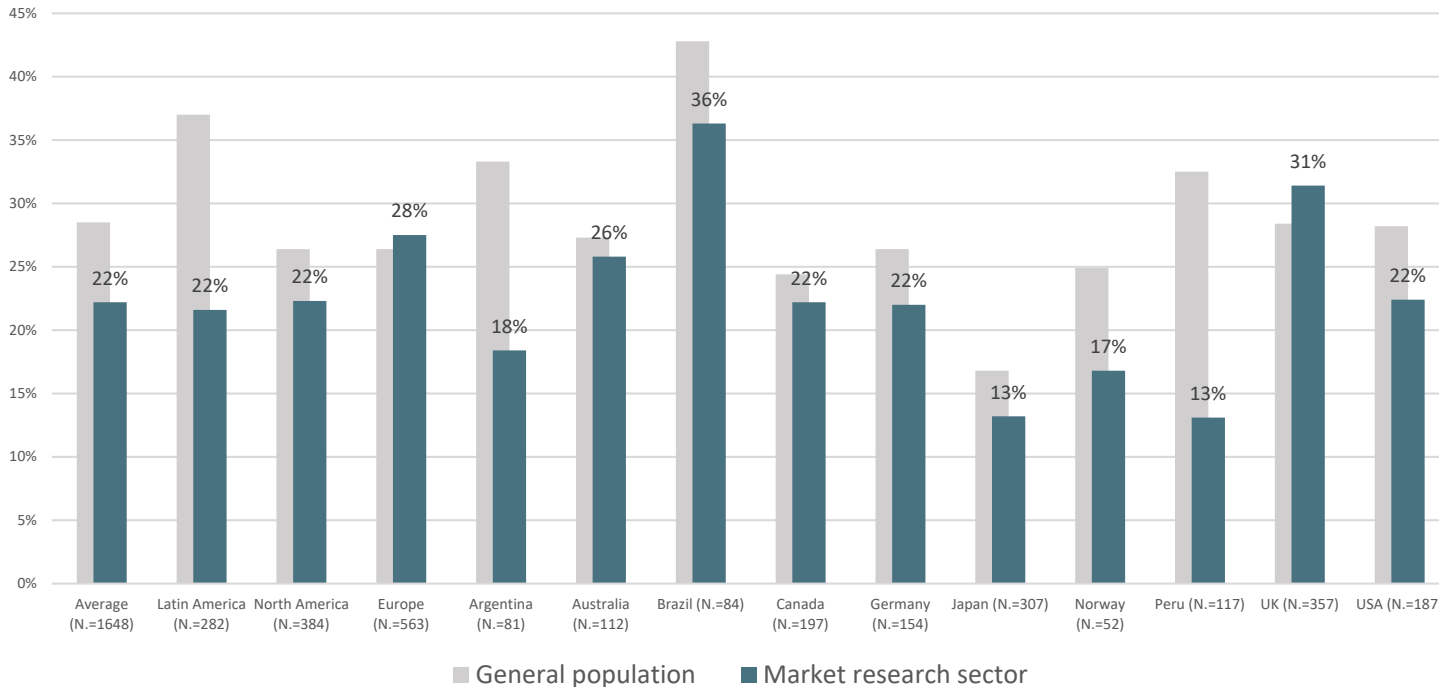


Base: Those who have more than 1 employee working in their company or are not self-employed.

Average across countries.

People working in the MR sector in Brazil and the UK are most likely to say they have witnessed unfair treatment by the organization. Relative to the general population, people working in the MR sector in Argentina and Peru are much less likely to have witnessed unfair treatment by the organization.

**Witnessing of Direct Discrimination in the Workplace Because of:
Unfair Treatment by Organization**
- % saying YES - By Country



Base: Those who have more than 1 employee working in their company or are not self-employed.

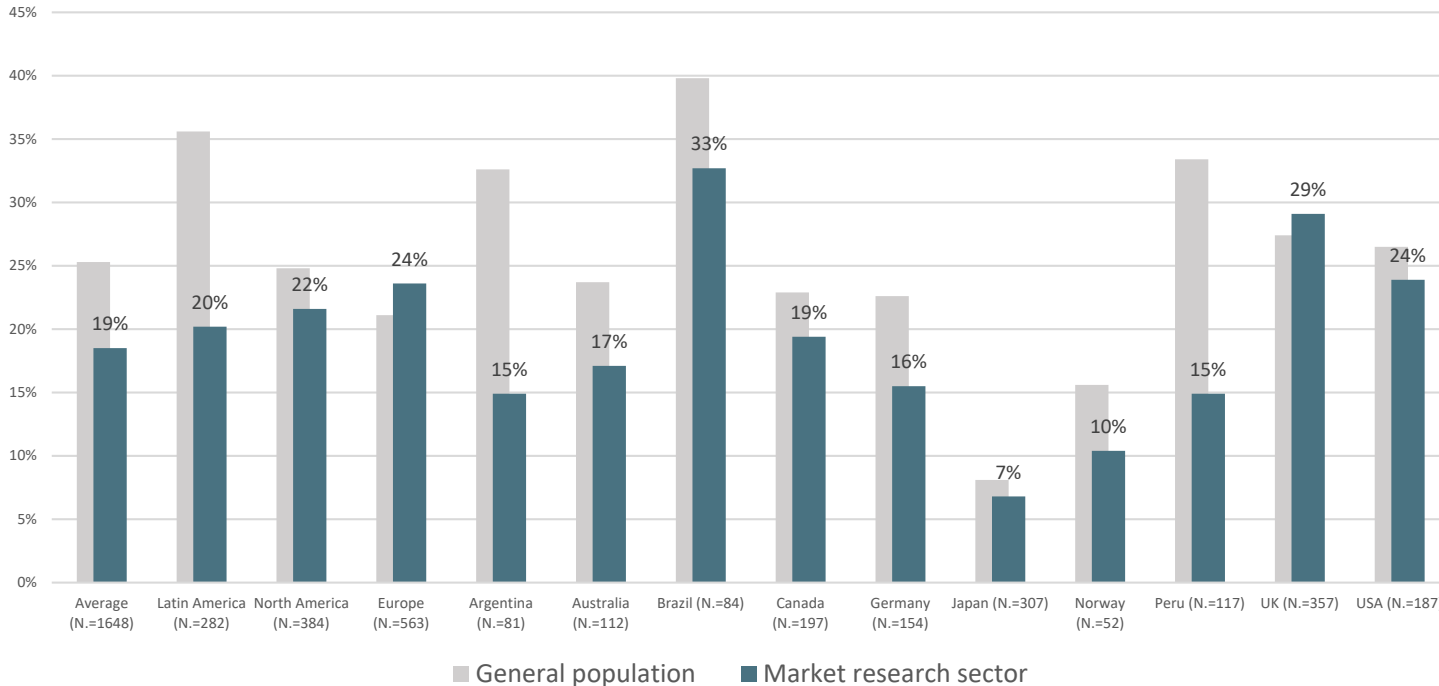
Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

People working in the MR sector in Brazil and the UK are most likely to say they have witnessed a negative colleague environment. Relative to the general population, people working in the MR sector in Argentina and Peru are much less likely to have witnessed a negative colleague environment.

Witnessing of Direct Discrimination in the Workplace Because of: Negative Colleague Environment

- % saying DISAGREE (bottom 2 box on a 5-point scale) - By Country



Base: Those who have more than 1 employee working in their company or are not self-employed.

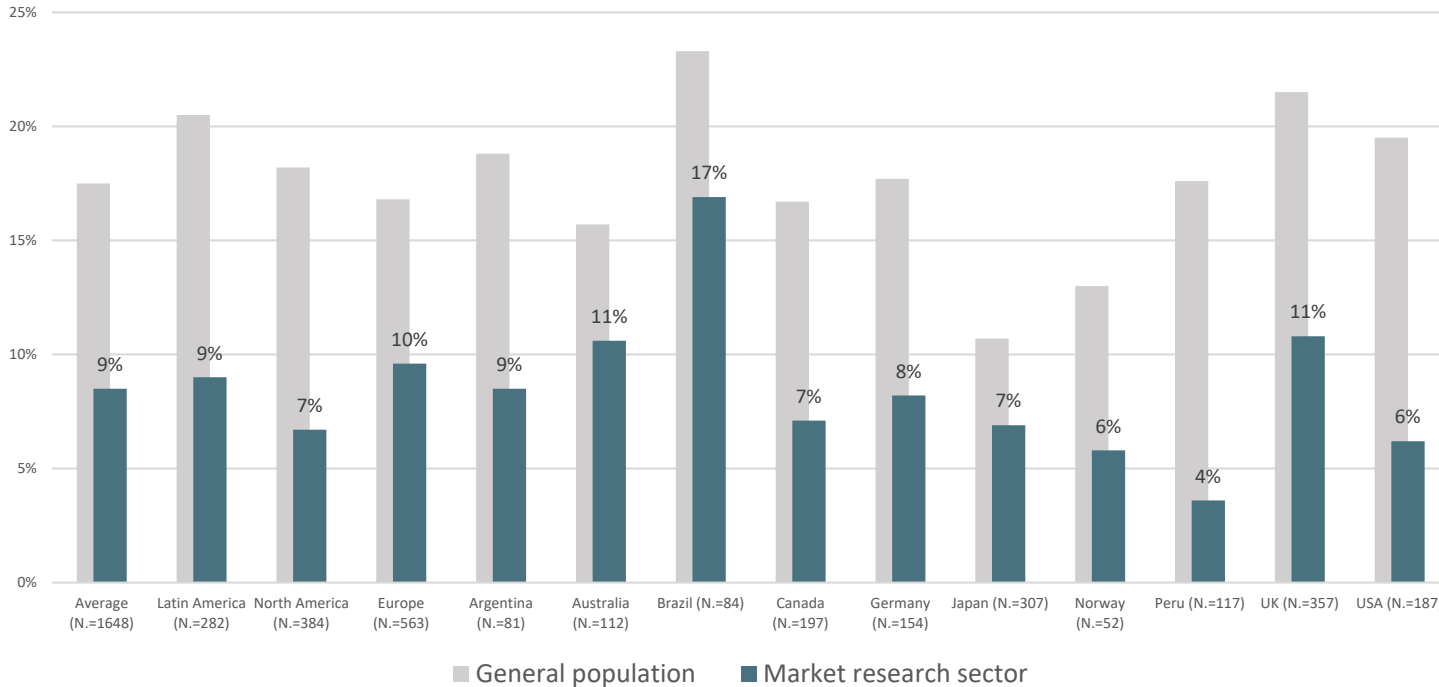
Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

People working in the MR sector are much less likely to have witnessed harassment than people working in other sectors. By country, the witnessing of harassment in the MR sector is relatively high in Brazil, whilst low in Norway and Peru.

Witnessing of Direct Discrimination in the Workplace Because of Harassment

- % saying DISAGREE (bottom 2 box on a 5-point scale) - By Country



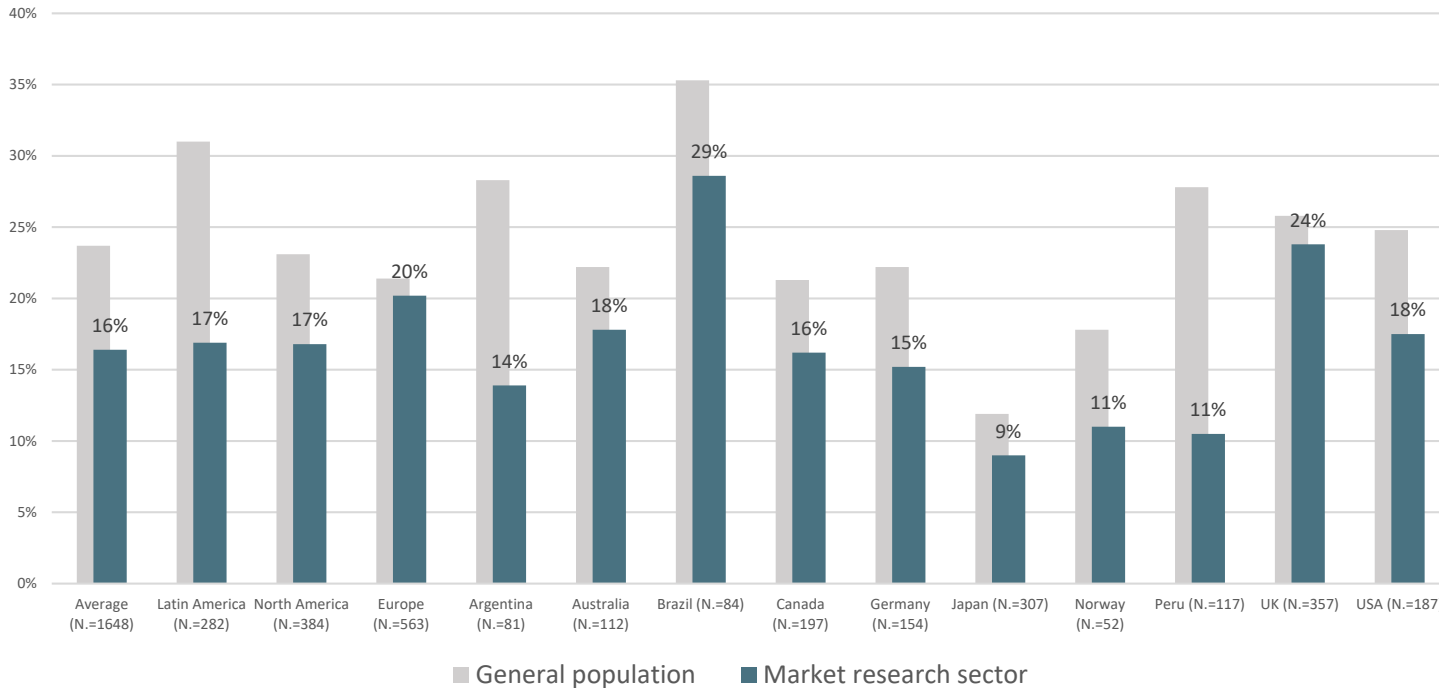
Base: Those who have more than 1 employee working in their company or are not self-employed.

Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

Based on the average across all factors, the witnessing of direct discrimination in the MR sector is highest in Brazil and the UK, and lowest in Japan, Norway and Peru.

Witnessing of Direct Discrimination in the Workplace - % saying YES - Average across all factors - By Country



Base: Those who have more than 1 employee working in their company or are not self-employed.

Base numbers shown for Market Research Sector only.

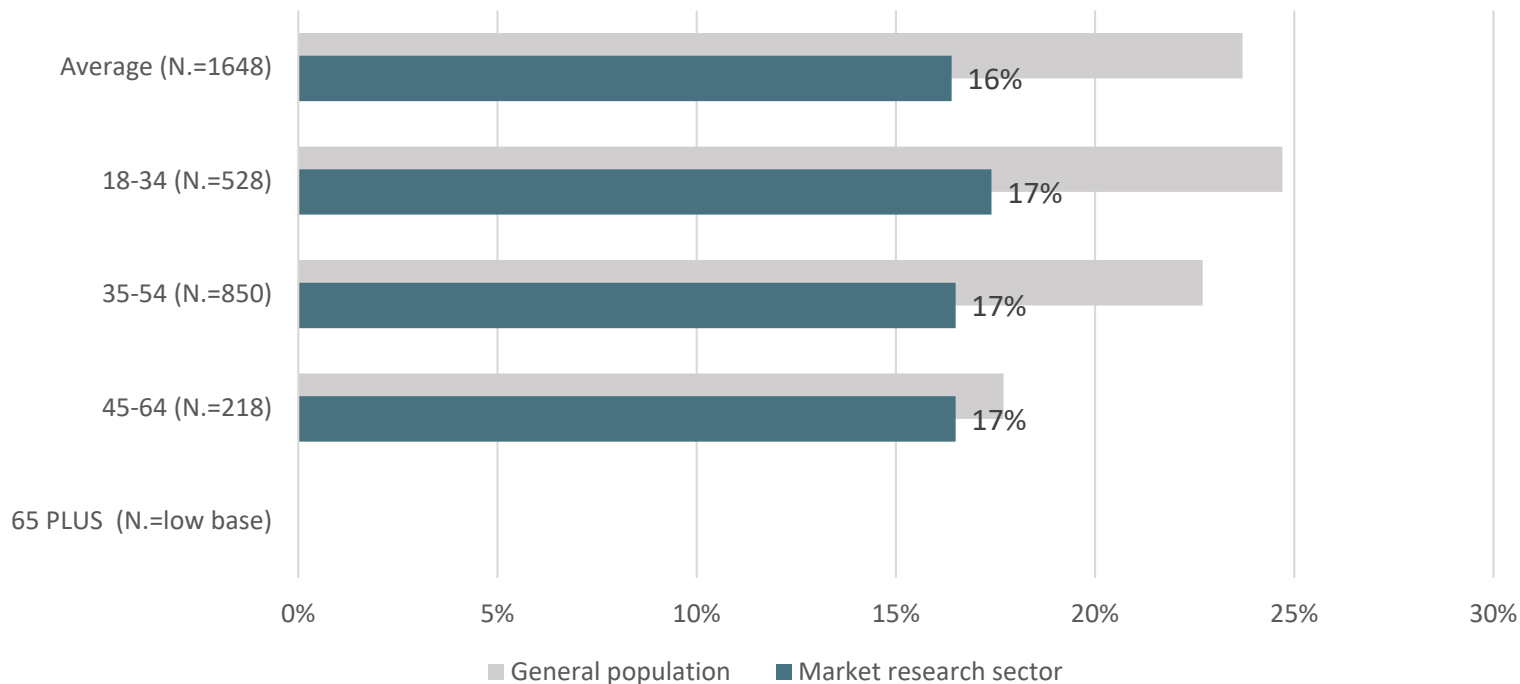
See Appendix for general population sample bases.

In the MR sector, age does not correlate with the witnessing of discrimination, whereas amongst the general population, 45 to 64 year olds are less likely to have witnessed discrimination.

Witnessing of Direct Discrimination in the Workplace

% saying YES - Average across all factors

– By Age Group



Base: Those who have more than 1 employee working in their company or are not self-employed.

Note: Market research sector in UK is based on 16+. All data in Japan is based on 20+.

Average across countries.

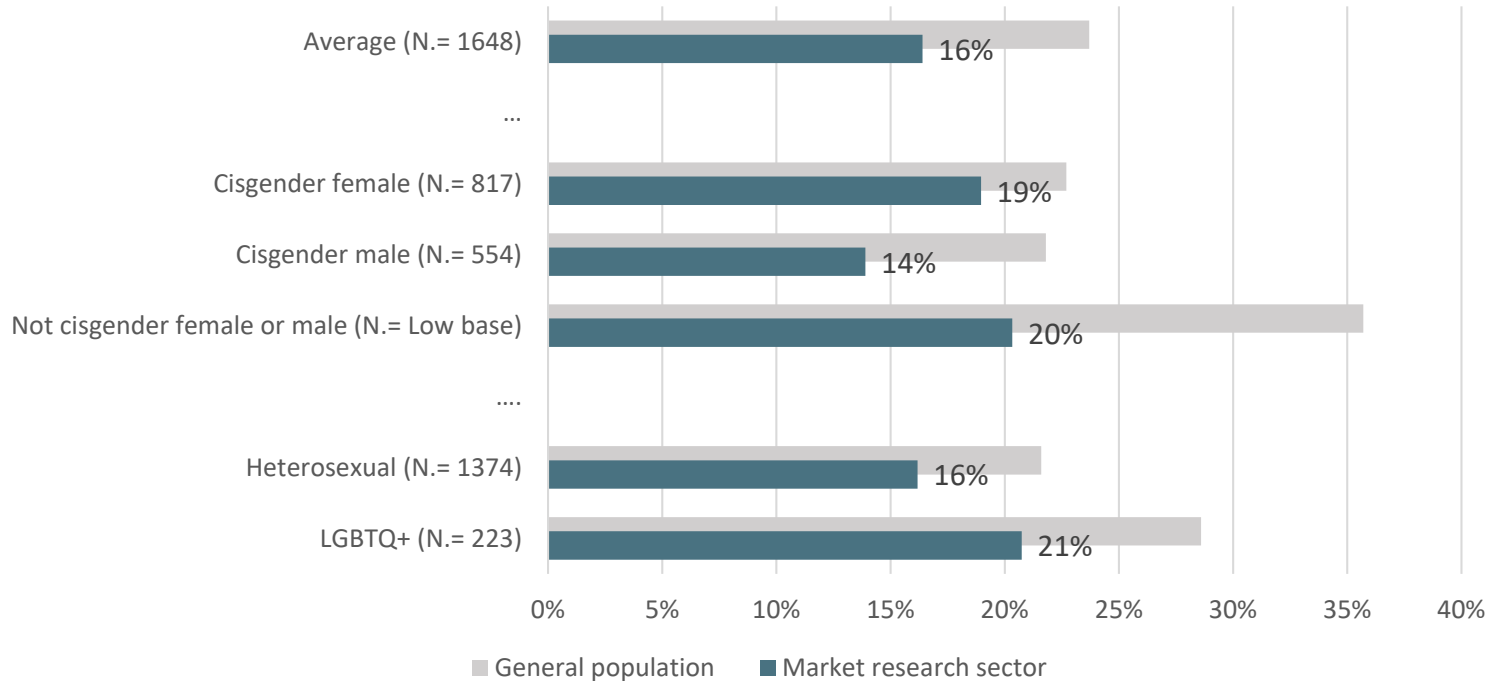
See Appendix for general population sample bases.

In the MR sector, cisgender females are slightly more likely than their male counterparts to have witnessed direct discrimination in the workplace. This is not the case amongst the general public.

Witnessing of Direct Discrimination in the Workplace

% saying YES - Average across all factors

By Gender Identity (excluding AU/PE) / Sexual Orientation (1)



Base: Those who have more than 1 employee working in their company or are not self-employed.

Base numbers shown for Market Research Sector only.

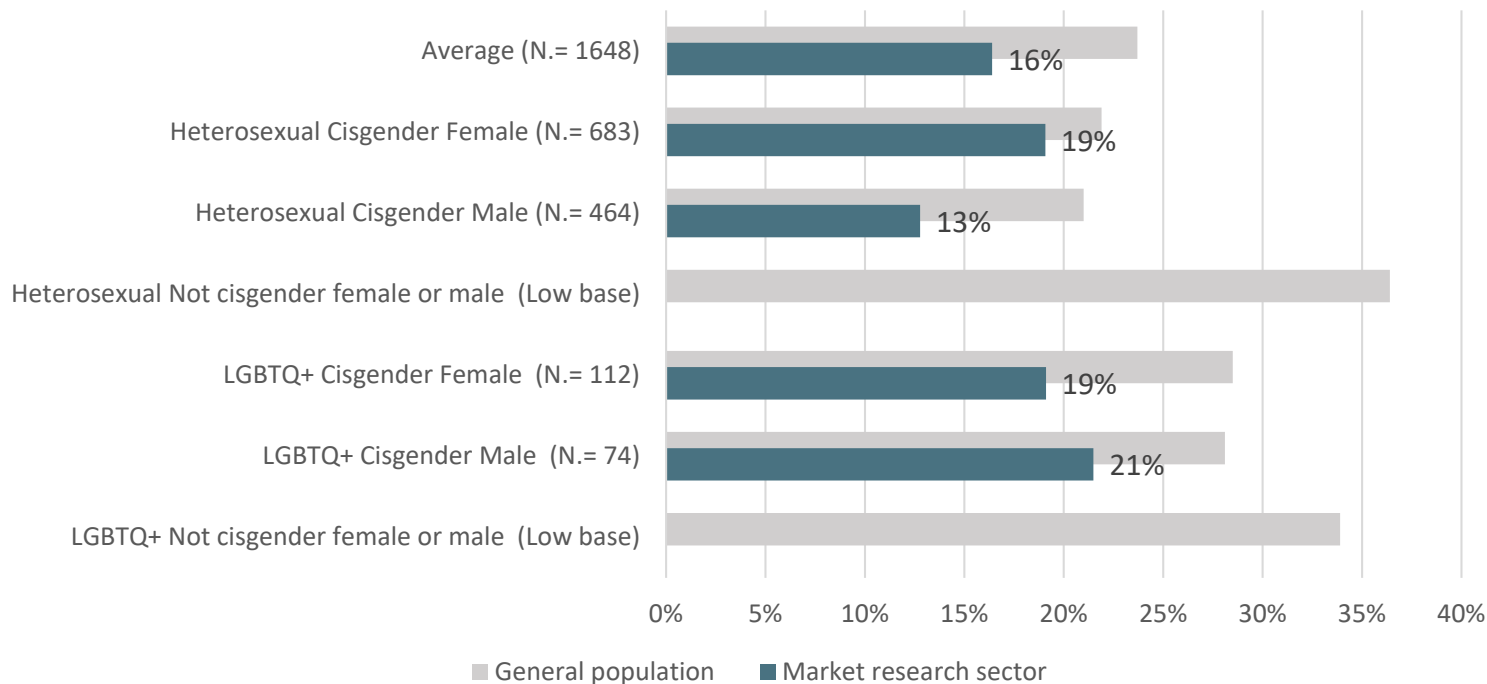
See Appendix for general population sample bases.

In the MR sector, heterosexual females are more likely than their male counterparts to have witnessed direct discrimination in the workplace. This is not the case amongst LGBTQ+ people.

Witnessing of Direct Discrimination in the Workplace

% saying YES - Average across all factors

- Excluding AU/PE - By Gender Identity / Sexual Orientation (2)



Base: Those who have more than 1 employee working in their company or are not self-employed.

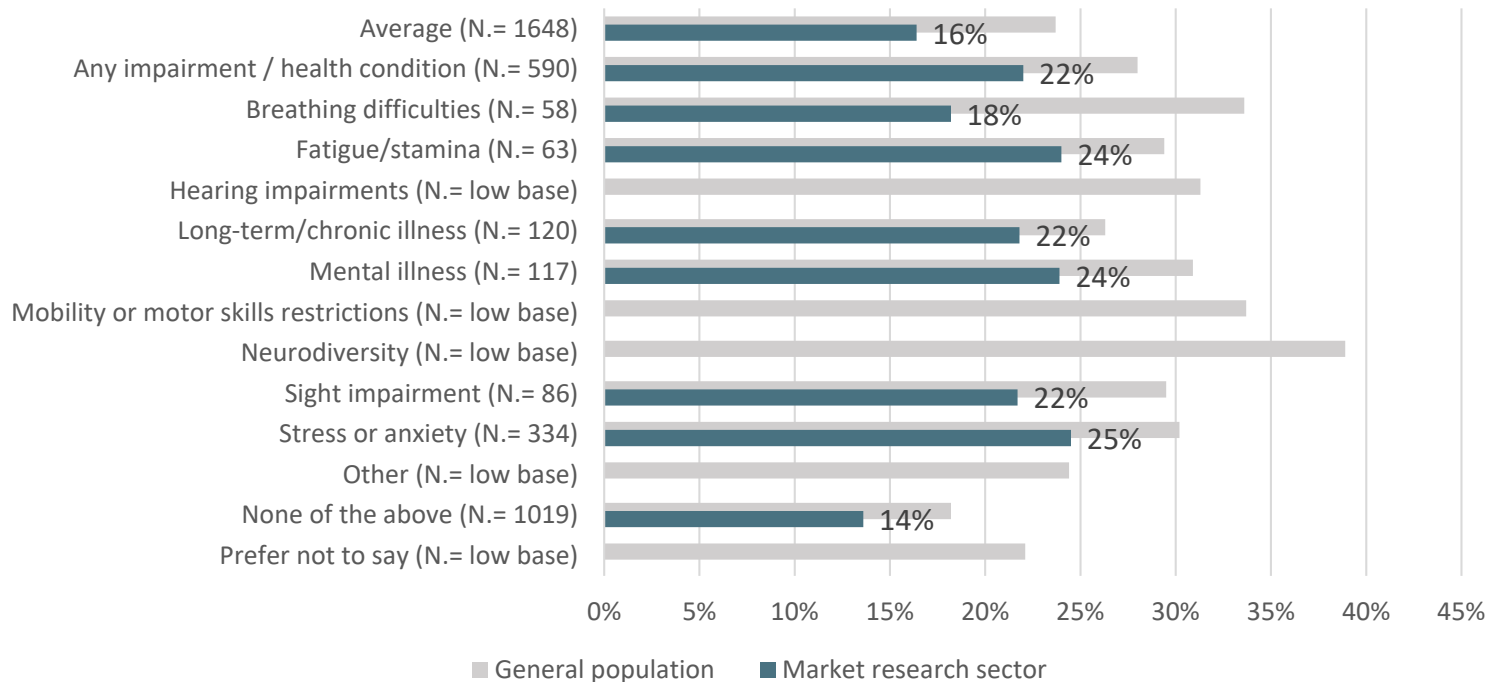
Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

People with impairments / health conditions are more likely to have witnessed discrimination. Amongst the general population, those with neurodiversity are most likely to have done so.

Witnessing of Direct Discrimination in the Workplace

- % saying YES - Average across all factors - By Impairments / Health Conditions



Base: Those who have more than 1 employee working in their company or are not self-employed.

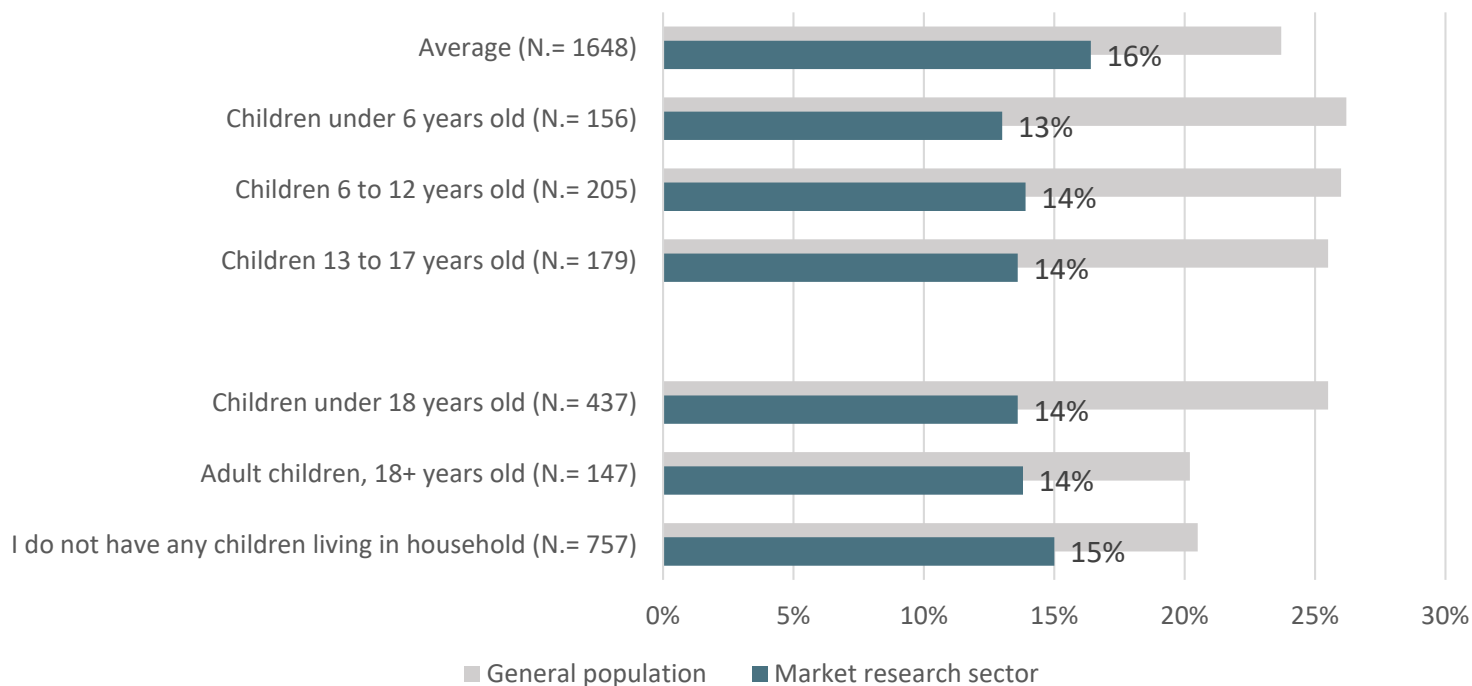
Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

In the MR sector, family status does not impact the likelihood to have witnessed discrimination in the workplace, whereas amongst the general population, those with children are somewhat more likely to have had such experience.

Witnessing of Direct Discrimination in the Workplace

- % saying YES - Average across all factors - By Family Status



Base: Those who have more than 1 employee working in their company or are not self-employed.

Note: Data from the UK for Market research sector is for children aged 16 plus, and is not included in the detailed breakdown by the age of child shown here

Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

WITNESSING OF DIRECT DISCRIMINATION IN THE WORKPLACE BY REASON FOR DISCRIMINATION



This section of the report looks at people's witnessing of discrimination in their currently (most recent) place of work by the reason for discrimination.

The survey asked about this with respect to:

- Age
- Gender
- Sexual Orientation/gender identity
- Ethnicity/race/skin color [Except DE]
- National Origin [Except DE]
- Religion/faitb/beliefs
- Family Status/caring responsibilities
- Disability/impairment/health condition
- Social Class [Except JP]

Using the scale:

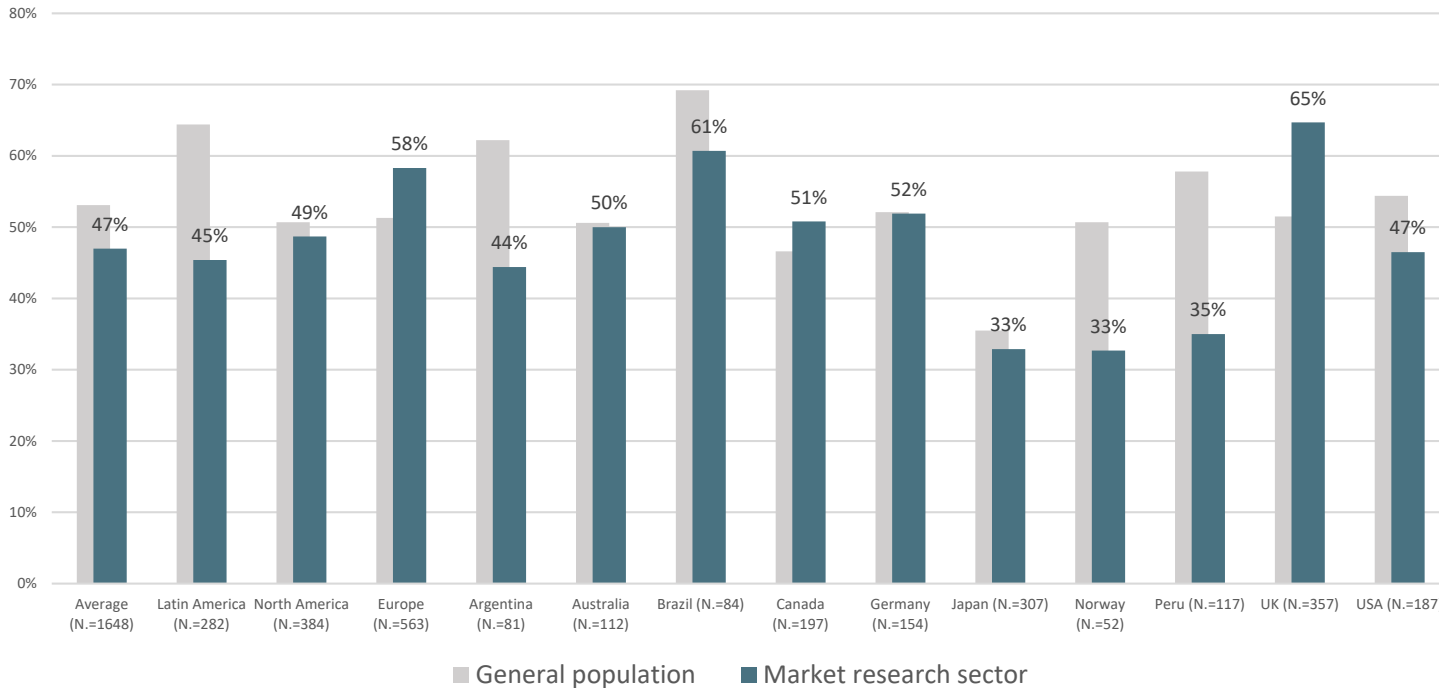
- Yes
- No
- Prefer not to say
- Don't know

In this section, we deep dive into the data based on those who say 'YES'.

Almost one in two people working in the MR sector have witnessed direct discrimination in the workplace, which is marginally lower than amongst the general population. Those working in the MR sector in Brazil and the UK are more likely than others to have witnessed discrimination.

Witnessing of Direct Discrimination in the Workplace because of ANY REASON

- % saying Yes - By Country



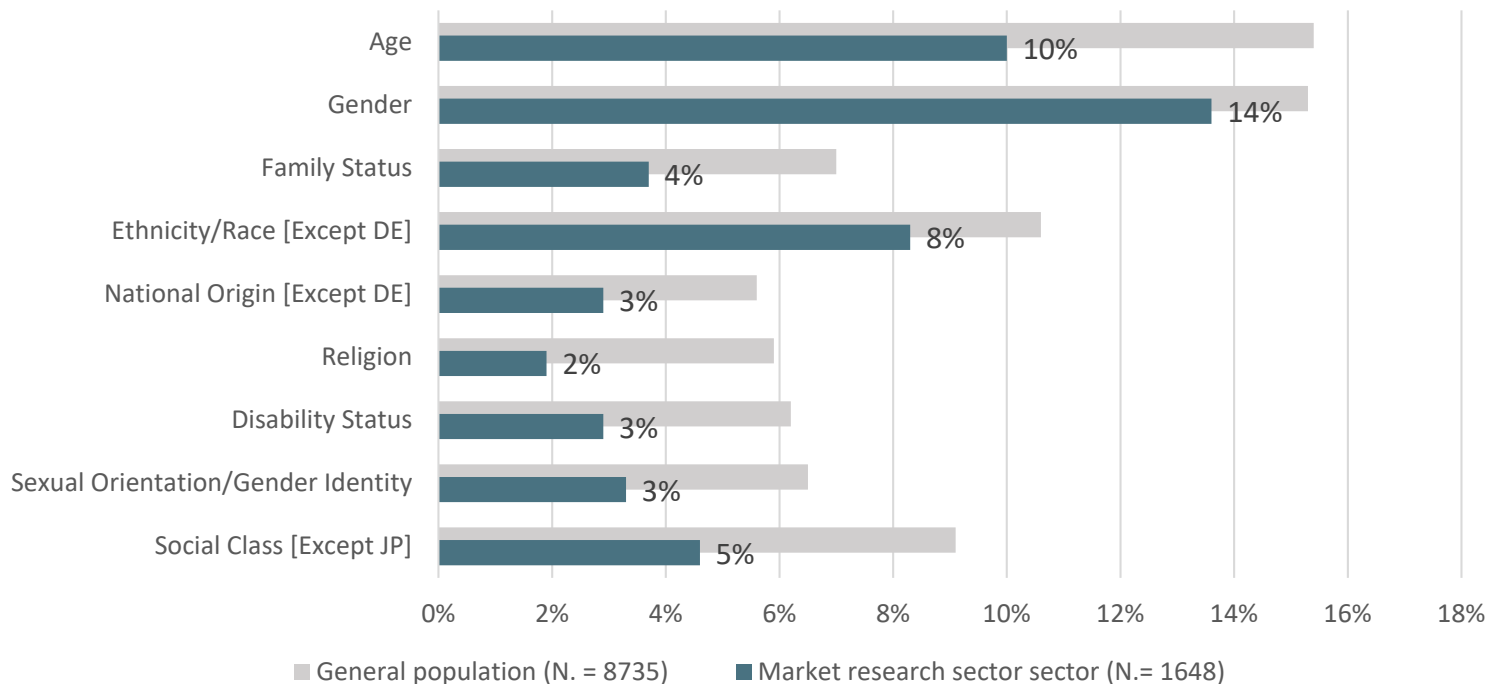
Base: Those who have more than 1 employee working in their company or are not self-employed.

Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

Both in the MR sector and in other sectors, gender, age and ethnicity are the most common reasons cited for witnessed discrimination in the workplace.

Witnessing of Direct Discrimination in the Workplace – By reason for discrimination:



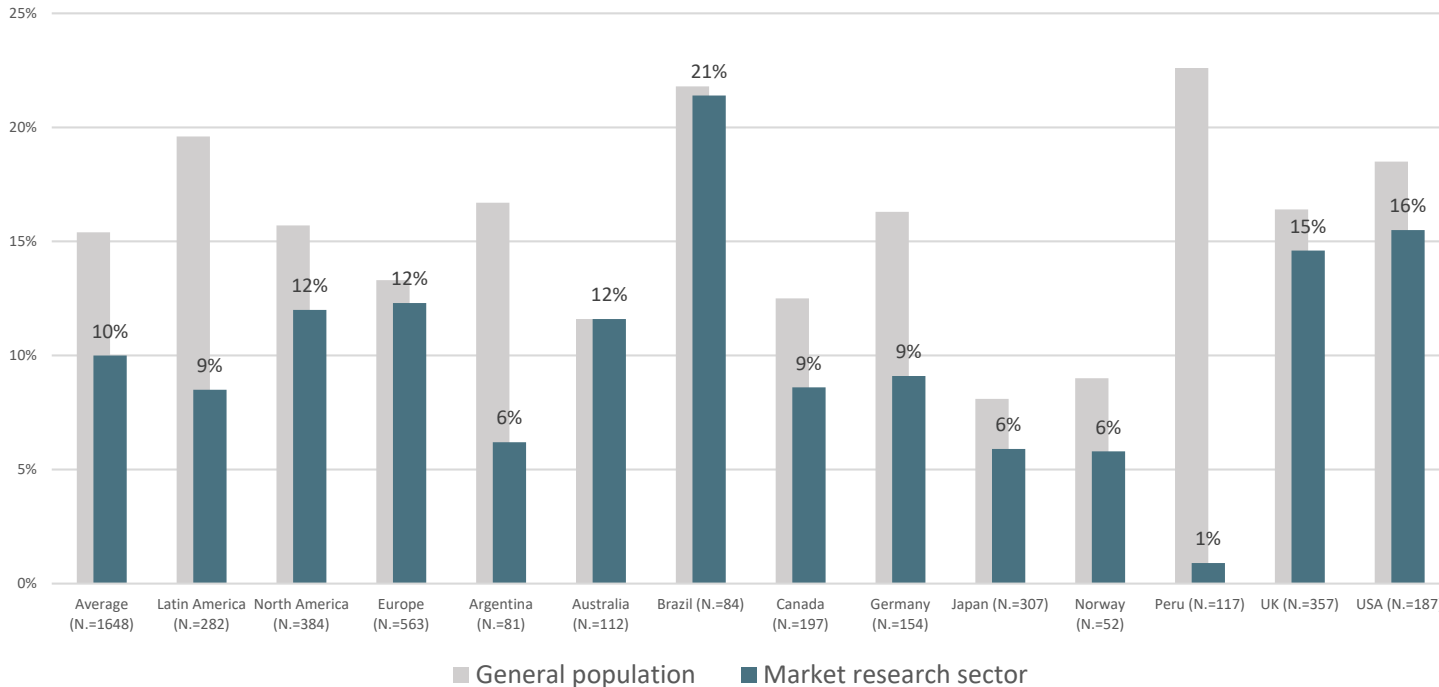
Base: Those who have more than 1 employee working in their company or are not self-employed.

Average across countries.

In the MR sector, the witnessing of age discrimination is most prevalent in Brazil. Witnessed age discrimination in the MR sector is almost non-existent in Peru, whilst in that country it is very prevalent in other sectors.

Witnessing of Direct Discrimination in the Workplace because of AGE

- % saying Yes - By Country



Base: Those who have more than 1 employee working in their company or are not self-employed.

Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

Younger adults are slightly more likely to have witnessed discrimination because of age, especially in the general population.

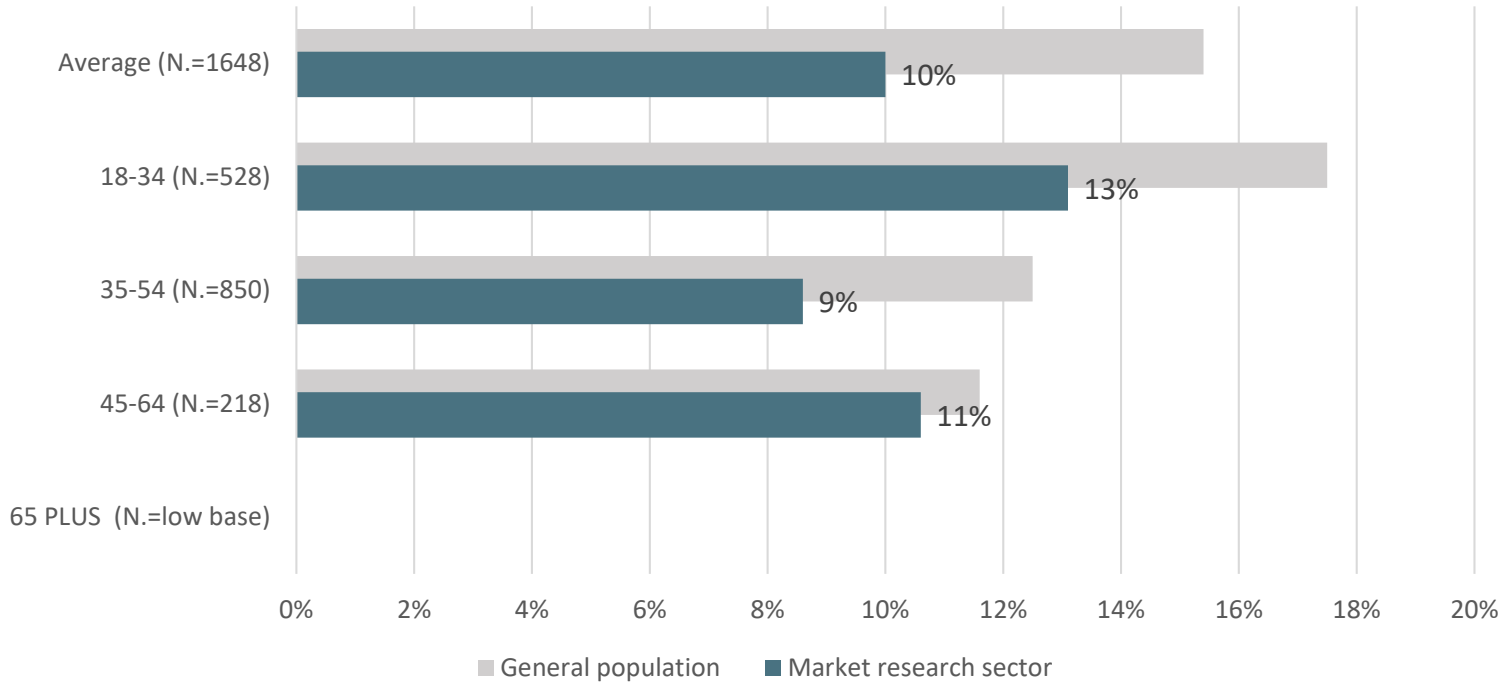
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Witnessing of Direct Discrimination in the Workplace because of

AGE

- % saying Yes – By Age Group



Base: Those who have more than 1 employee working in their company or are not self-employed.

Note: Market research sector in UK is based on 16+. All data in Japan is based on 20+.

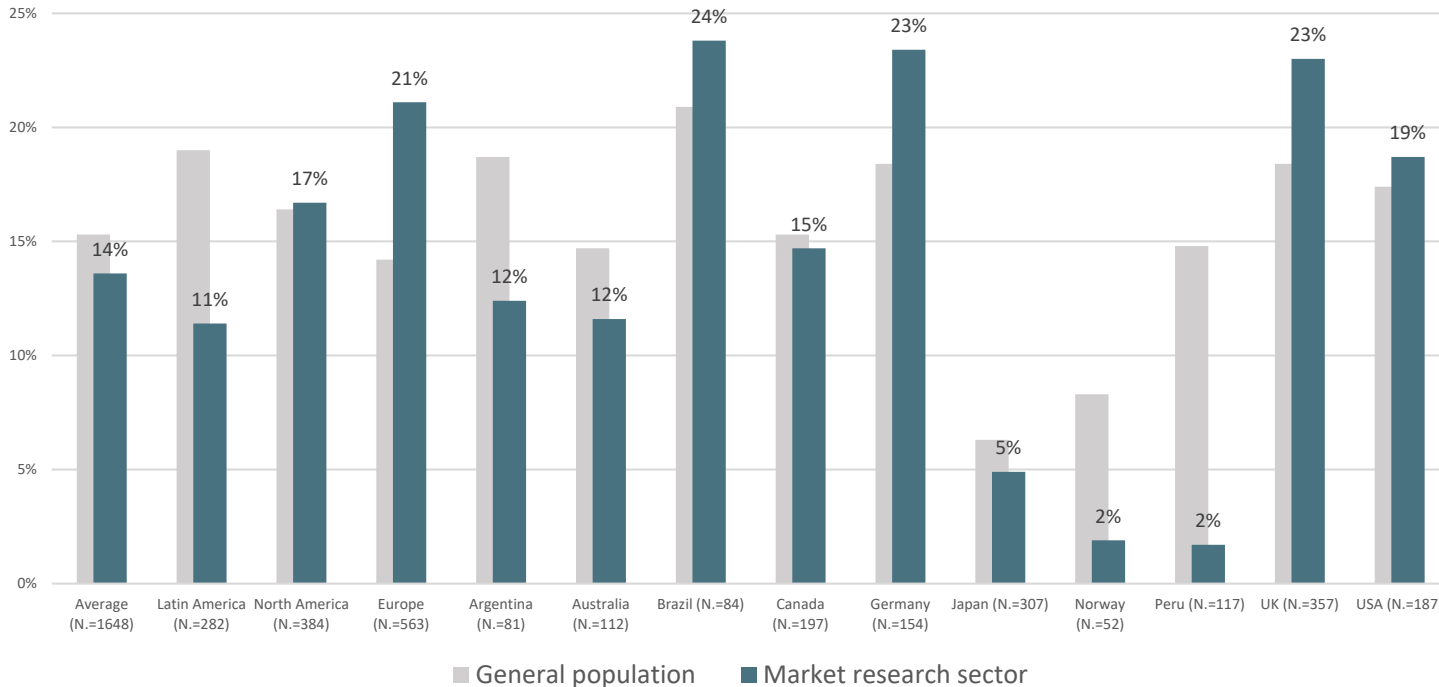
Base numbers shown for Market Research Sector only

See Appendix for general population sample bases.

Almost one-in-four people working in the MR sector in Brazil, Germany and the UK have witnessed gender discrimination. This is higher than in the general population in those countries. The witnessing of gender discrimination is very low in Japan, Norway and Peru, especially in the MR sector in those countries.

Witnessing of Direct Discrimination in the Workplace because of GENDER

- % saying Yes - By Country



Base: Those who have more than 1 employee working in their company or are not self-employed.

Base numbers shown for Market Research Sector only.

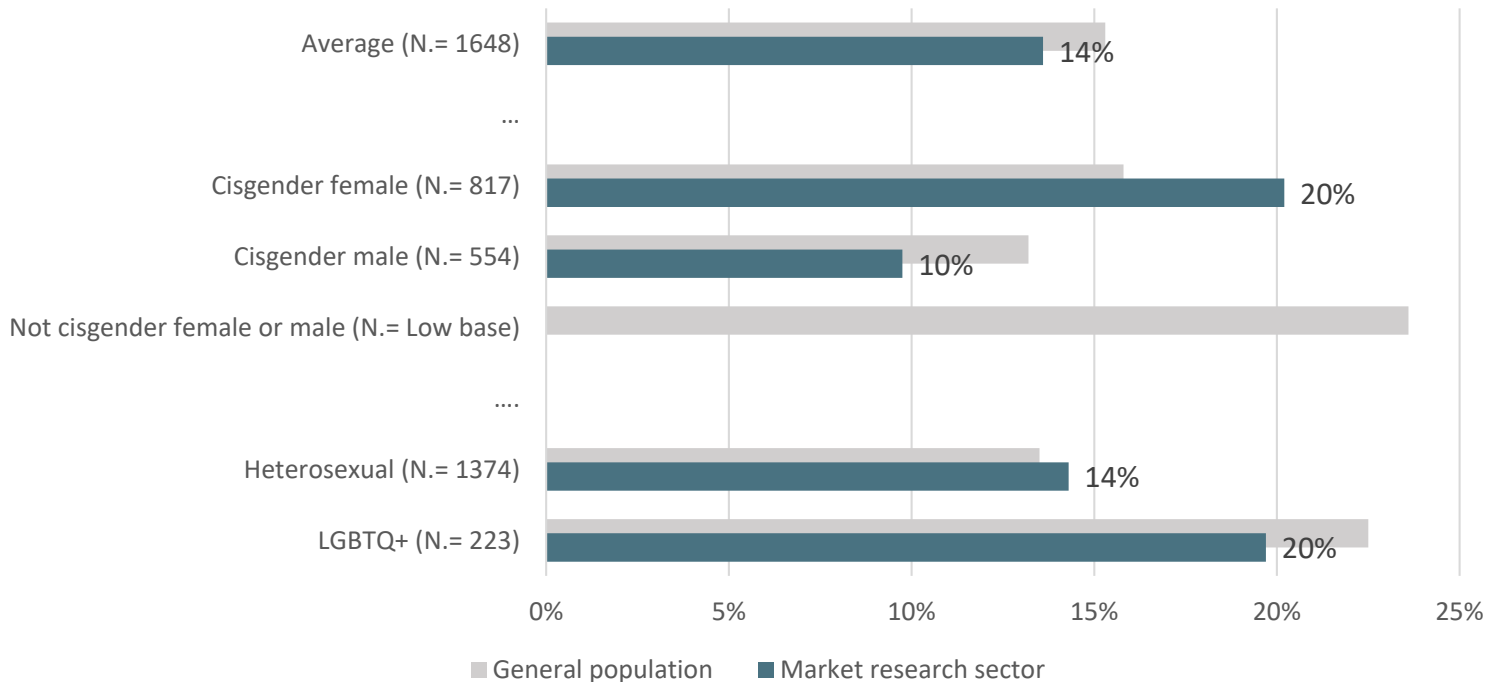
See Appendix for general population sample bases.

One-in-five cisgender females working in the MR sector have witnessed gender discrimination in the workplace, which is significantly higher than in the general population, and double the proportion amongst cisgender males in the sector. LGBTQ+ people working in the MR sector are more likely than their heterosexual colleagues to have witnessed gender discrimination in the workplace.

Witnessing of Direct Discrimination in the Workplace because of

GENDER - % saying Yes –

By Gender Identity (excluding AU/PE) / Sexual Orientation (1)



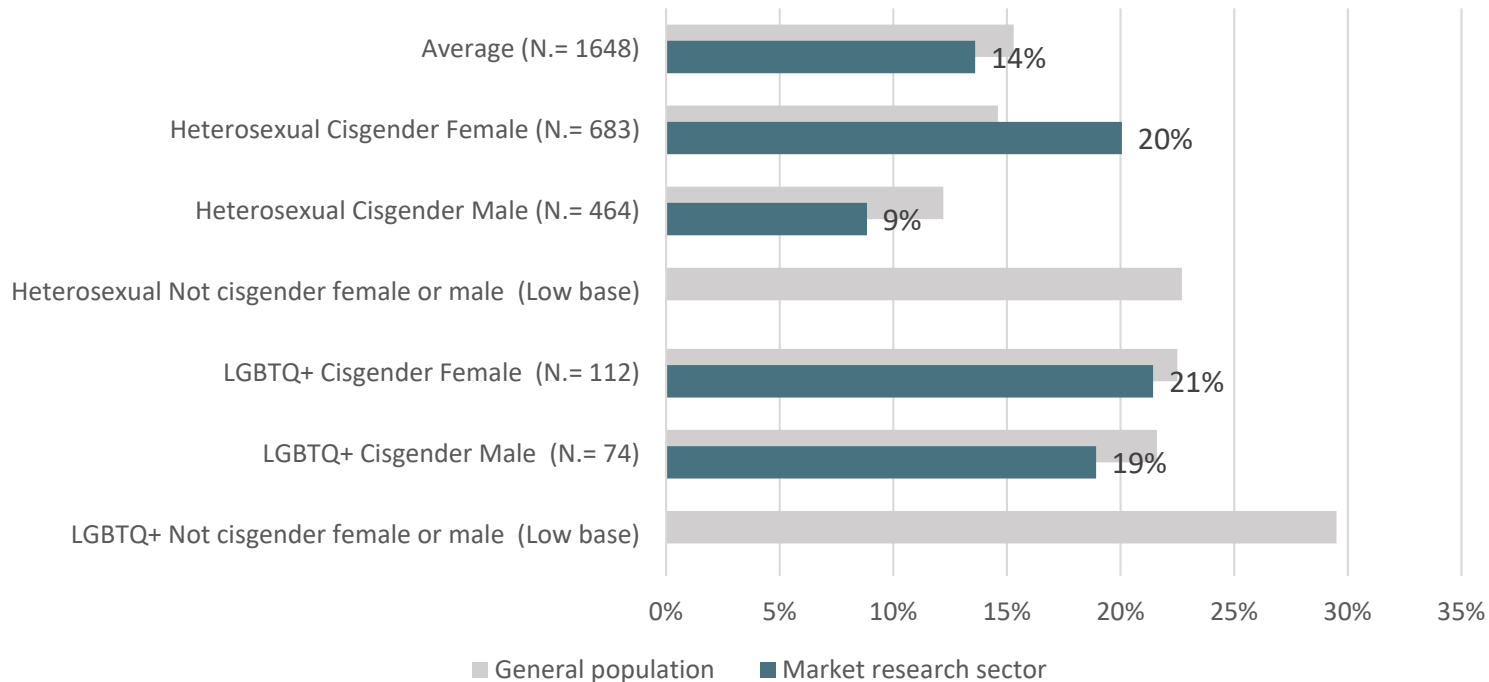
Base: Those who have more than 1 employee working in their company or are not self-employed.

Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

Witnessing of Direct Discrimination in the Workplace because of GENDER

- % saying Yes -- Excluding AU/PE - By Gender Identity / Sexual Orientation (2)



Base: Those who have more than 1 employee working in their company or are not self-employed.

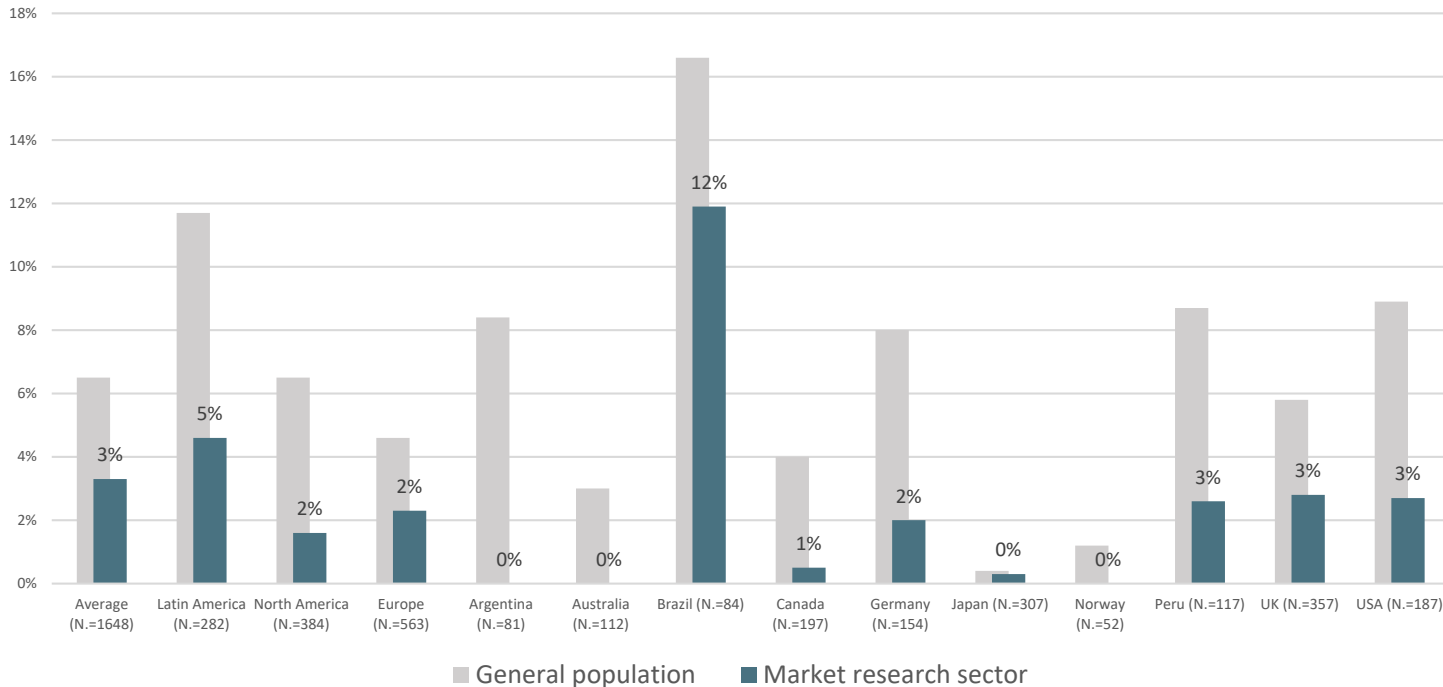
Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

The witnessing of sexual orientation / gender identity discrimination is low in the MR sector and lower than amongst the general population. The exception is Brazil, where more than one-in-ten people both in and outside of the MR sector say they have witnessed discrimination due to sexual orientation / gender identity

Witnessing of Direct Discrimination in the Workplace because of SEXUAL ORIENTATION/GENDER IDENTITY

- % saying YES - By Country



Base: Those who have more than 1 employee working in their company or are not self-employed.

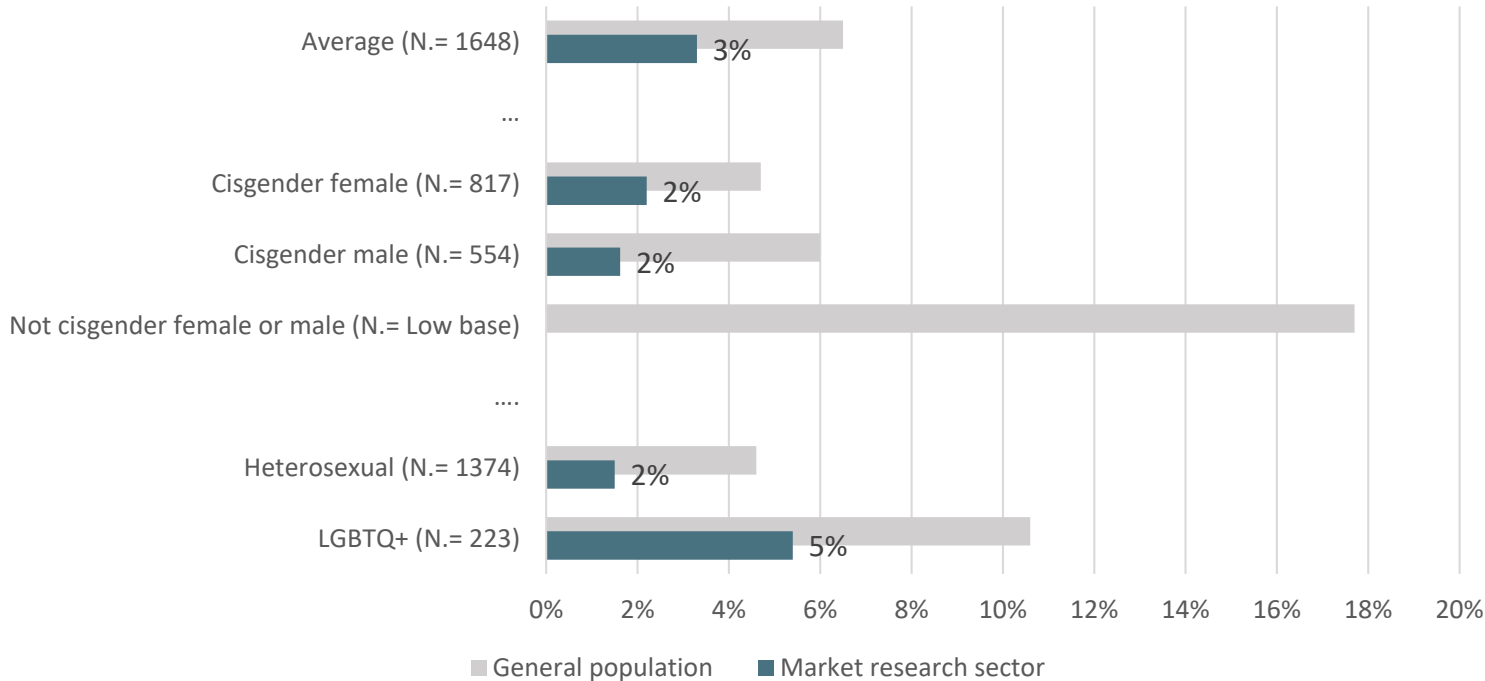
Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

Amongst the general public, the witnessing of sexual orientation / gender identity discrimination is particularly high amongst not cisgender people (reaching almost one-in-five). In the MR sector, one-in-twenty LGBTQ+ people have witnessed sexual orientation / gender identity discrimination in the workplace, more than twice the proportion of heterosexual people.

Witnessing of Direct Discrimination in the Workplace because of SEXUAL ORIENTATION / GENDER IDENTITY?

- % saying YES – By Gender Identity (excluding AU/PE) / Sexual Orientation (1)



Base: Those who have more than 1 employee working in their company or are not self-employed.

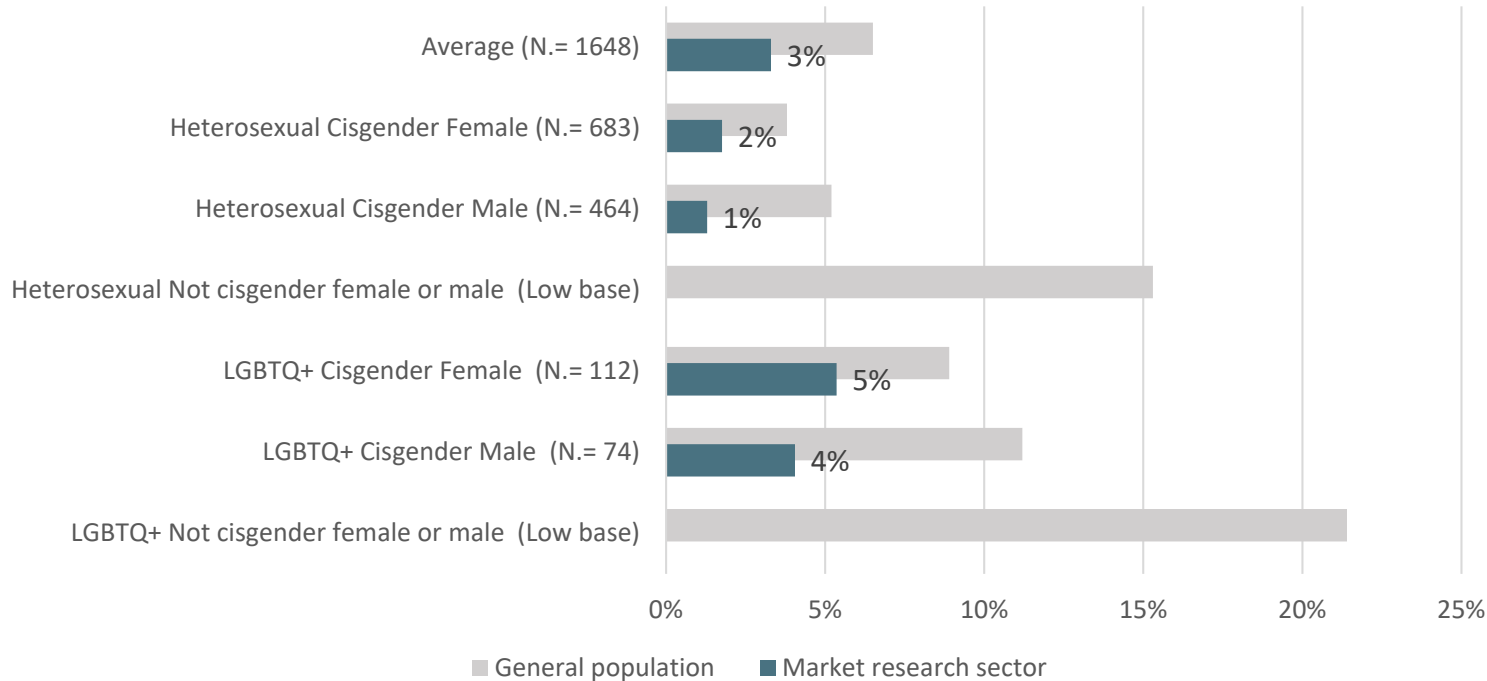
Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

Amongst the general public, the witnessing of sexual orientation / gender identity discrimination is particularly high amongst LGBTQ+ not cisgender people, reaching over one-in-five.

Witnessing of Direct Discrimination in the Workplace because of SEXUAL ORIENTATION / GENDER IDENTITY?

- % saying YES – Excluding AU/PE - Gender Identity / Sexual Orientation (2)



Base: Those who have more than 1 employee working in their company or are not self-employed.

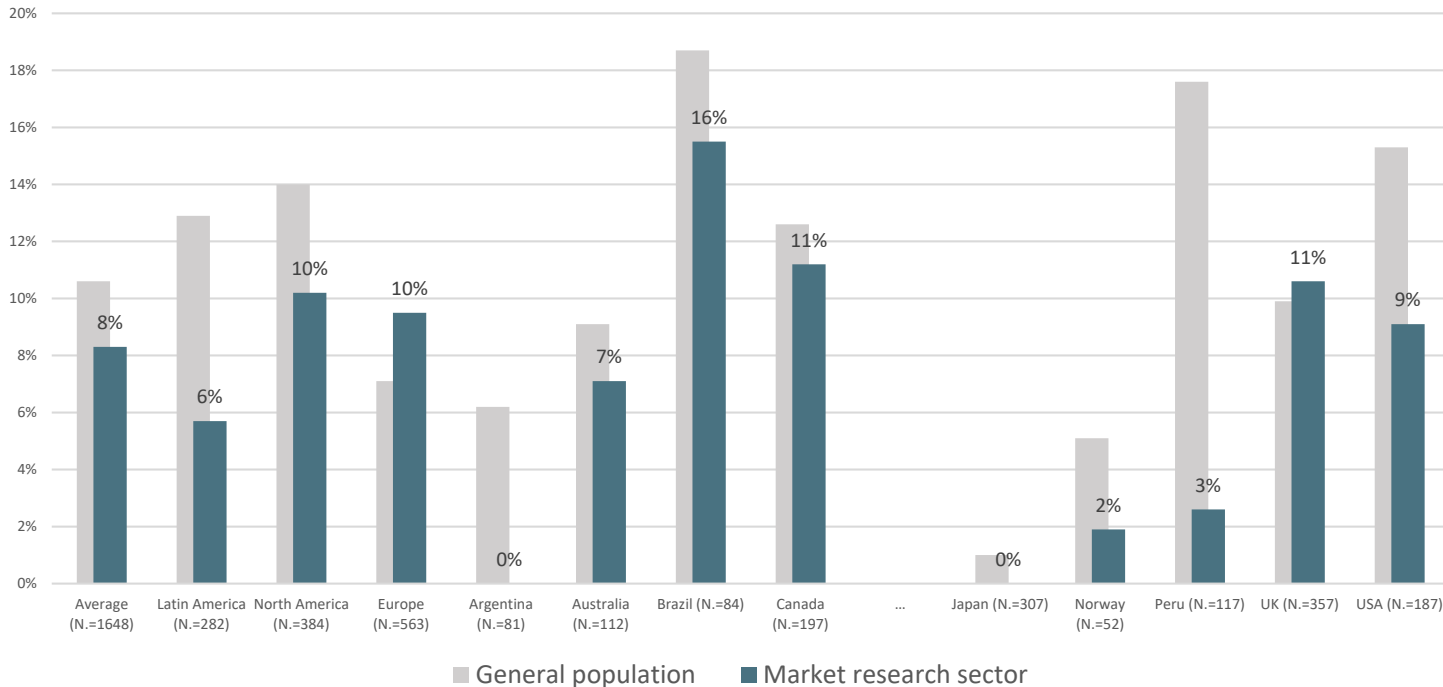
Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

Around one-in-ten people both in and outside of the MR sector have witnessed discrimination in the workplace due to ethnicity. In Argentina, Japan, Norway and Peru, few people in the MR sector have witnessed discrimination in the workplace due to ethnicity.

Witnessing of Direct Discrimination in the Workplace because of ETHNICITY

- % saying YES - By Country (excluding Germany)



Base: Those who have more than 1 employee working in their company or are not self-employed.

Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

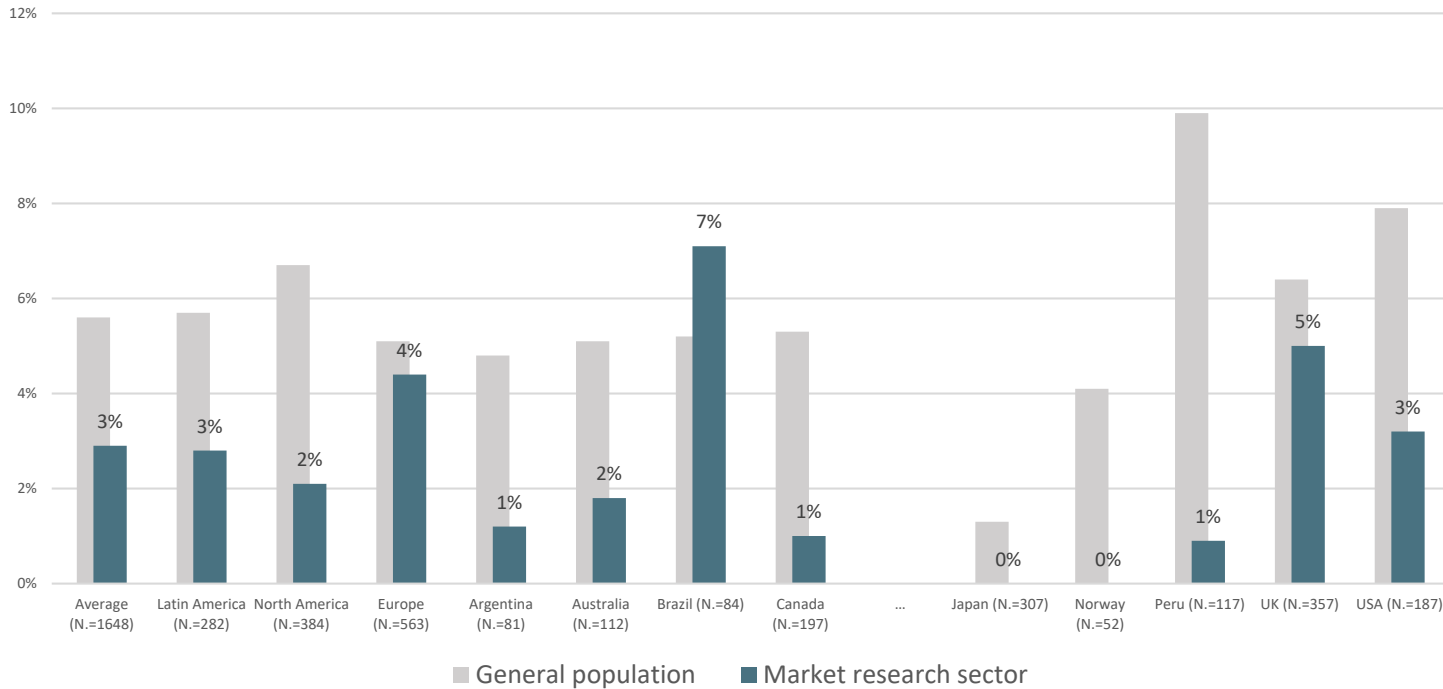
The witnessing of discrimination due to national origin is low in the MR sector and lower than amongst the general population.

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Witnessing of Direct Discrimination in the Workplace because of NATIONAL ORIGIN

- % saying YES - By Country (excluding Germany)



Base: Those who have more than 1 employee working in their company or are not self-employed.

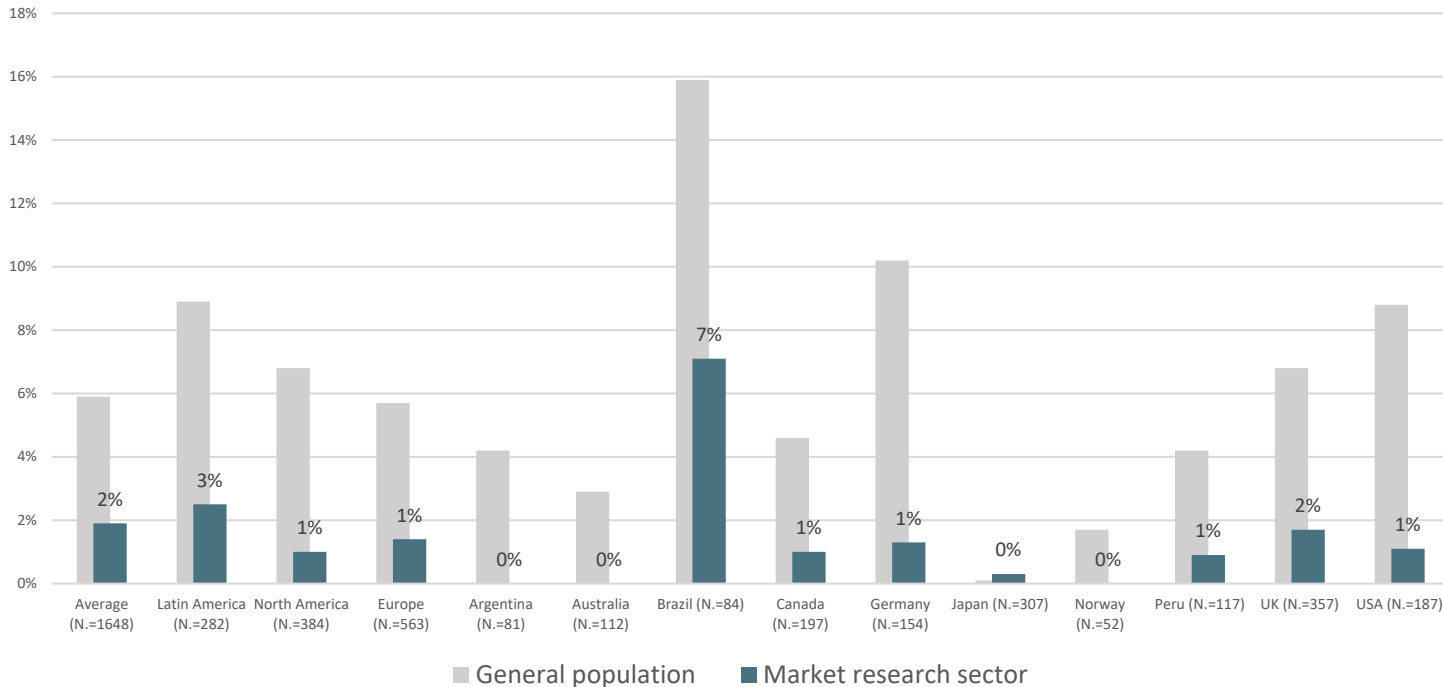
Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

The witnessing of discrimination in the workplace due to religion is very low in the MR sector and much lower than amongst the general population. Amongst the general population such discrimination is most witnessed in Brazil, Germany and the USA.

Witnessing of Direct Discrimination in the Workplace because of RELIGION

- % saying YES - By Country



Base: Those who have more than 1 employee working in their company or are not self-employed.

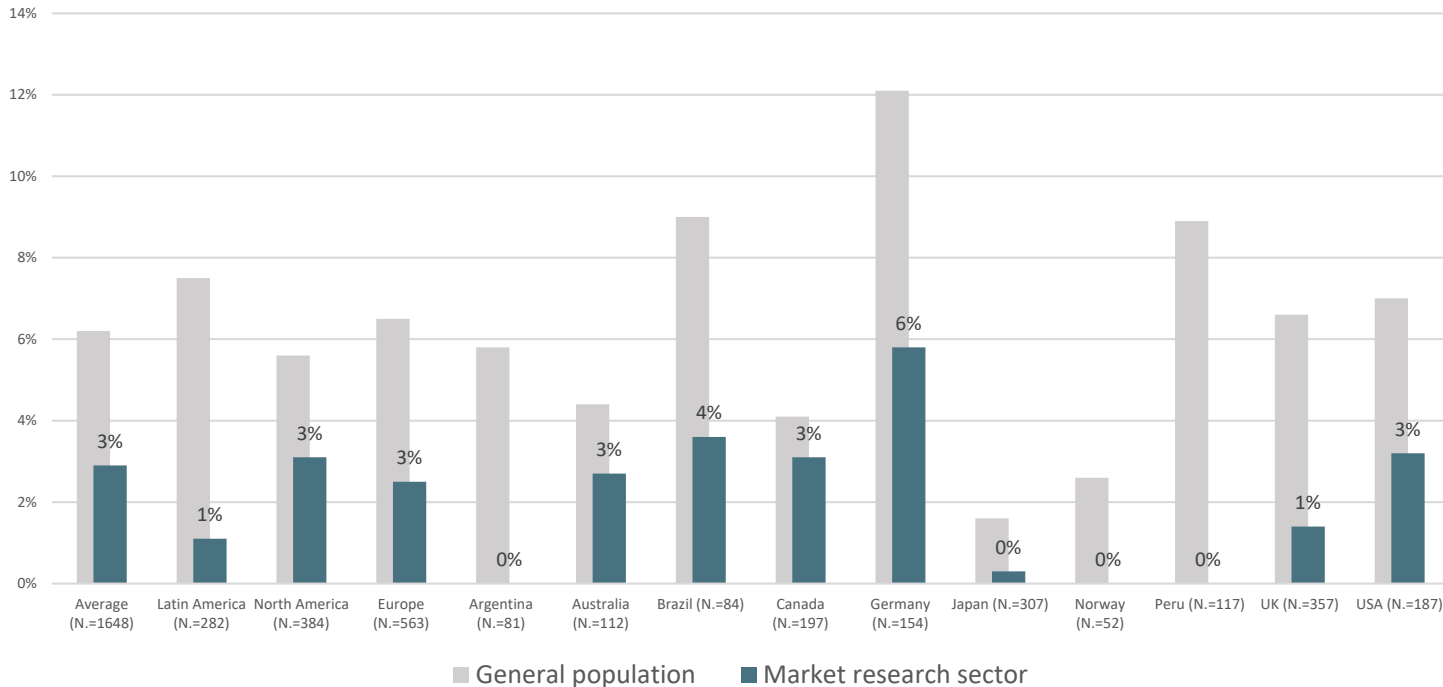
Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

The witnessing of discrimination due to disability status is low in the MR sector and much lower than amongst the general population. Amongst the general population, as well as in the MR sector, Germany stands out as the country where the witnessing of personal experience with discrimination due to disability status is highest.

Witnessing of Direct Discrimination in the Workplace because of DISABILITY STATUS

- % saying YES - By Country



Base: Those who have more than 1 employee working in their company or are not self-employed.

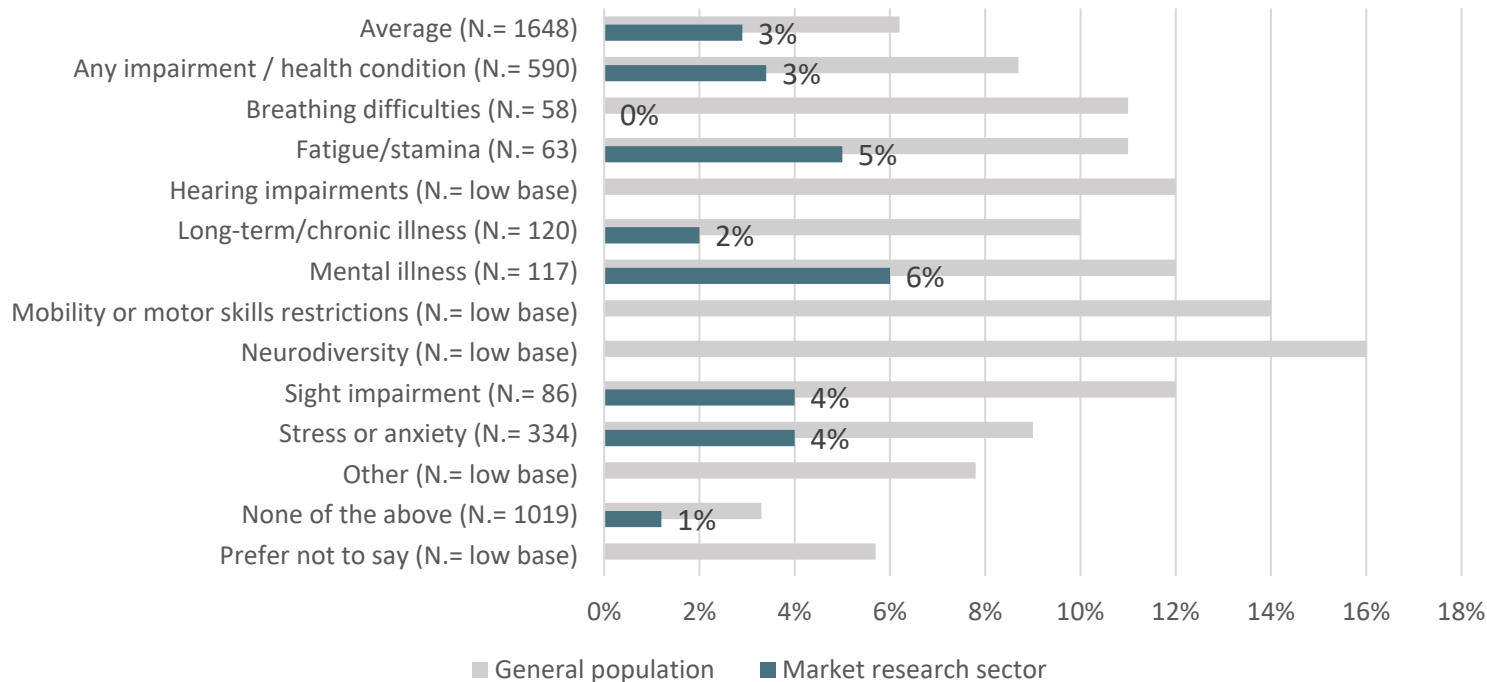
Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

Amongst the general population, it is people with mobility restrictions and neurodiversity who have personal experience the most discrimination due to disability status. People with none of the impairments / health conditions are much less likely than those with more or more impairments / health conditions to be witness to discrimination due to disability status.

Witnessing of Direct Discrimination in the Workplace because of DISABILITY STATUS

- % saying YES - By Impairments / Health Conditions



Base: Those who have more than 1 employee working in their company or are not self-employed.

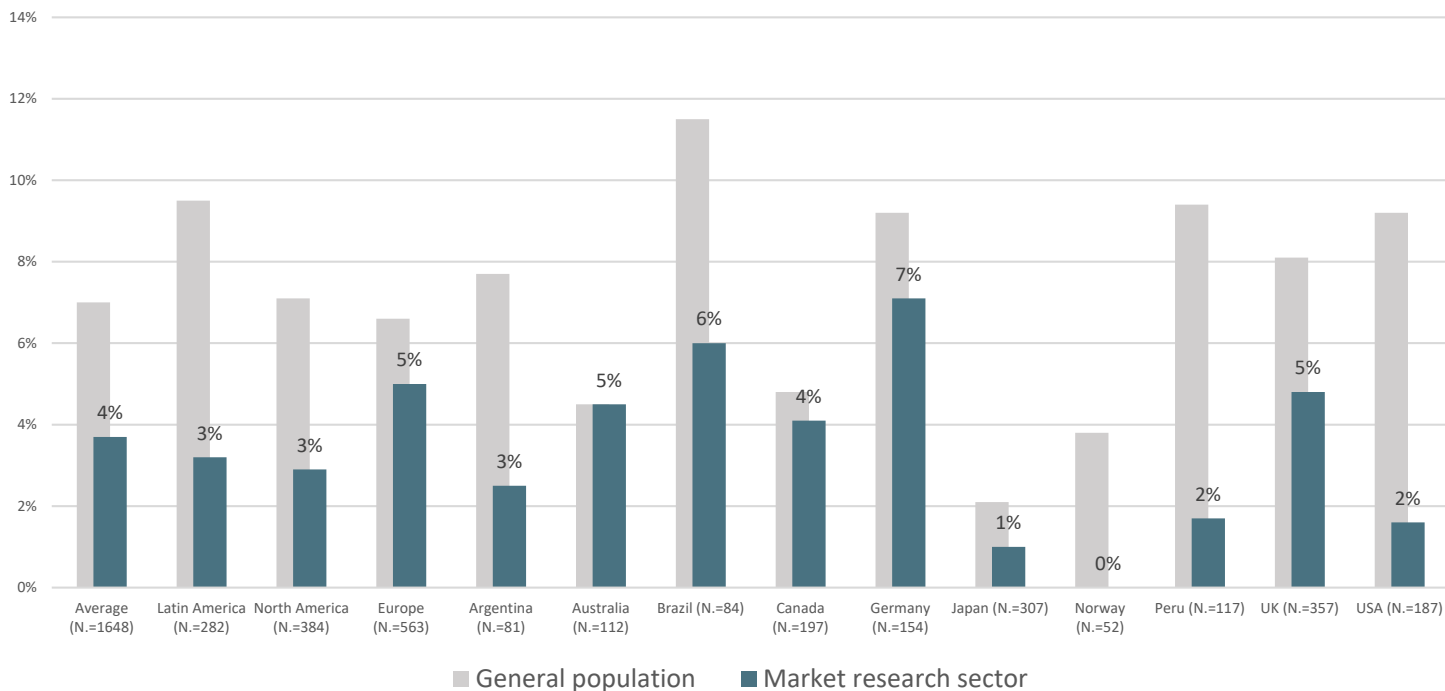
Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

The witnessing of discrimination at work due to family status is much lower in the MR sector than amongst the general public.

Witnessing of Direct Discrimination in the Workplace because of FAMILY STATUS

- % saying YES - By Country



Base: Those who have more than 1 employee working in their company or are not self-employed.

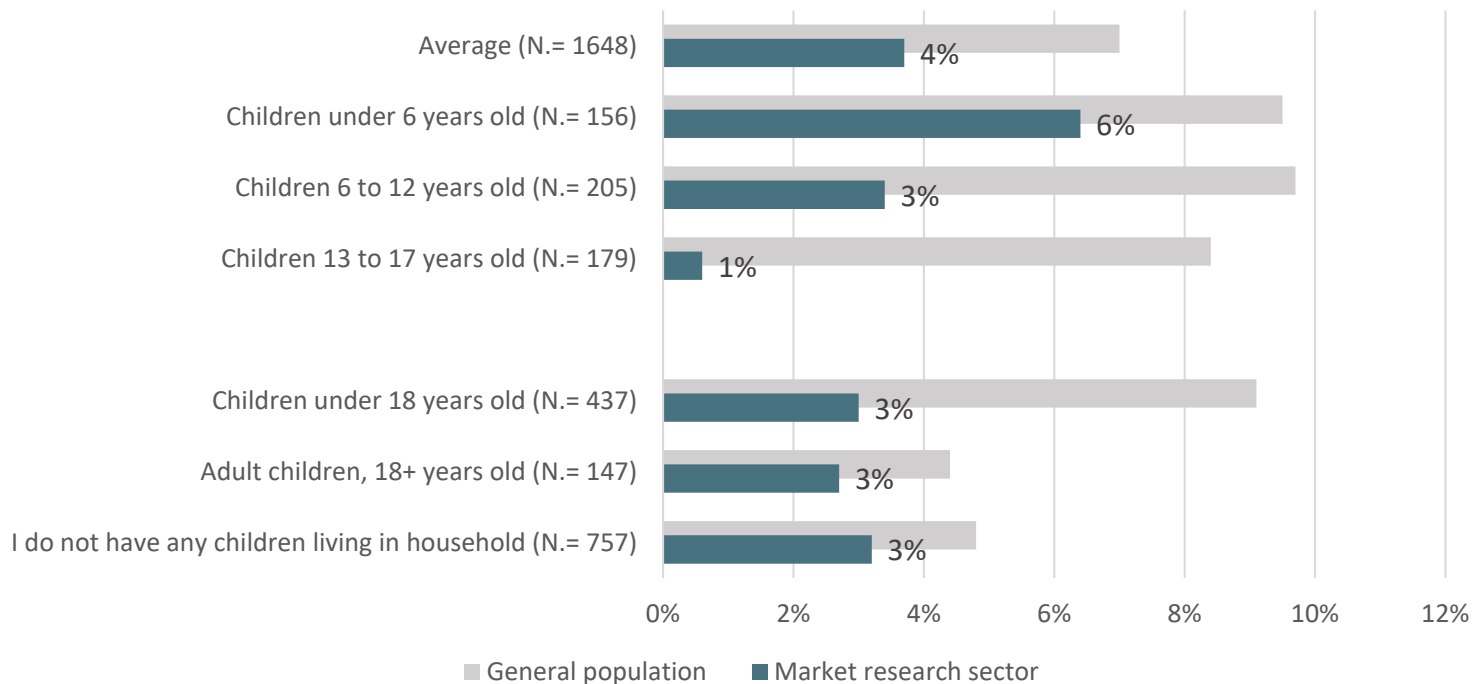
Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

6% of people working in the MR sector who have children under 6 say they have witnessed discrimination due to family status. Amongst the general public, those with children under 18 are most likely than others to have witnessed such discrimination.

Witnessing of Direct Discrimination in the Workplace because of FAMILY STATUS

- % saying YES - By Family Status



Base: Those who have more than 1 employee working in their company or are not self-employed.

Note: Data from the UK for Market research sector is for children aged 16 plus, and is not included in the detailed breakdown by the age of child shown here

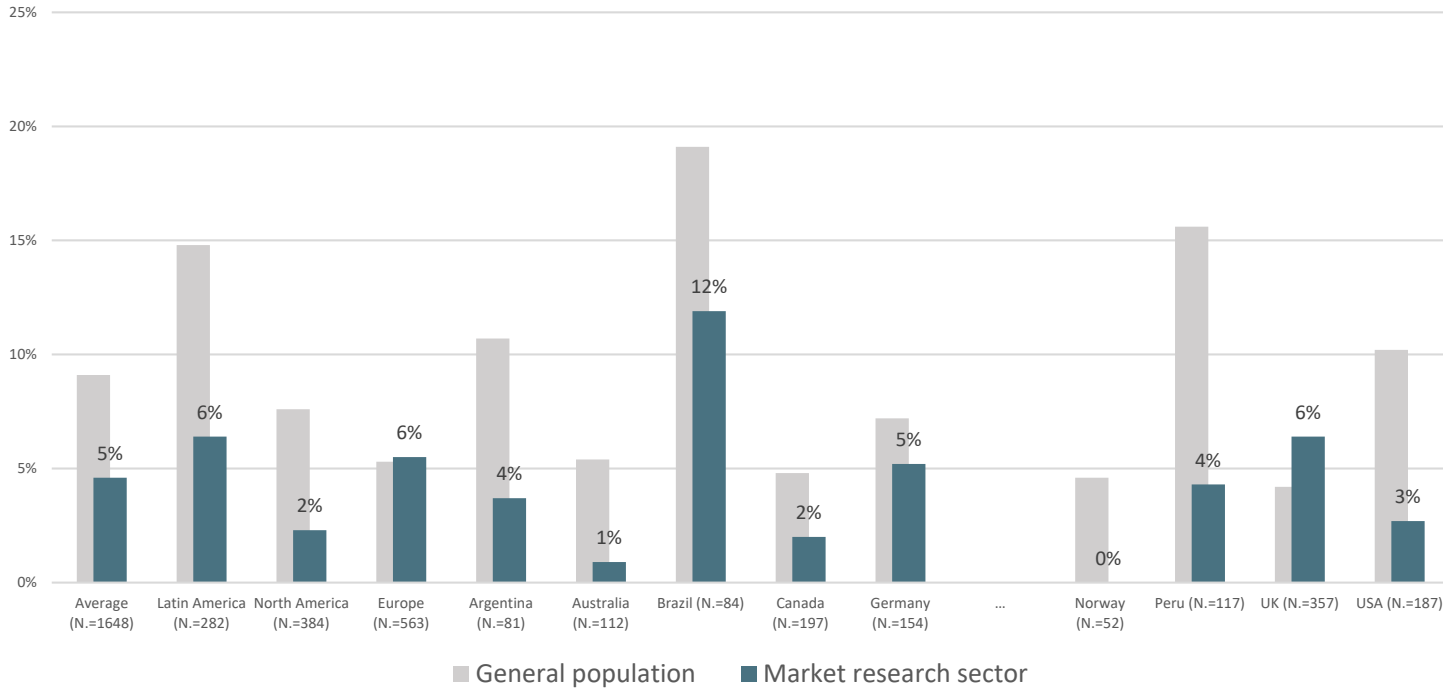
Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

The witnessing of discrimination in the workplace due to social status is low in the MR sector and lower than amongst the general population. Such discrimination in the MR sector is most noticeable in Brazil.

Witnessing of Direct Discrimination in the Workplace because of SOCIAL STATUS

- % saying YES - By Country (excluding Japan)



Base: Those who have more than 1 employee working in their company or are not self-employed.

Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.



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IMPAIRMENTS
AND HEALTH
CONDITIONS

IMPAIRMENTS AND HEALTH CONDITIONS

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IMPAIRMENTS AND HEALTH CONDITIONS

One-in-three people working in the MR sector say they suffer from at least one of the impairments / health conditions covered by the research. This is much less than the proportion amongst the general population (45%).

As many as one-in-five people working in the MR sector have stress / anxiety.

Stress and anxiety can be seen amongst those working in the MR sector in many countries. The exceptions are Germany, Japan and Peru, countries where the prevalence of stress / anxiety is also relatively low amongst the general population.

6% of people working in the MR sector have **mental illness**. The proportion of people with mental illness working in the MR sector is relatively high in Australia, the US, the UK and Canada. Australia stands out as a country where the proportion in the MR sector equals that in the general population, whereas elsewhere it tends to be lower.

4% of people working in the MR sector have **fatigue / low stamina**. As a country, Germany stands out as a place where more people in the working population say they have fatigue / low stamina than in the MR sector. In the MR sector, it is in Peru where the highest proportion of people say they have fatigue / low stamina.

4% of people working in the MR sector have **breathing difficulties**. As

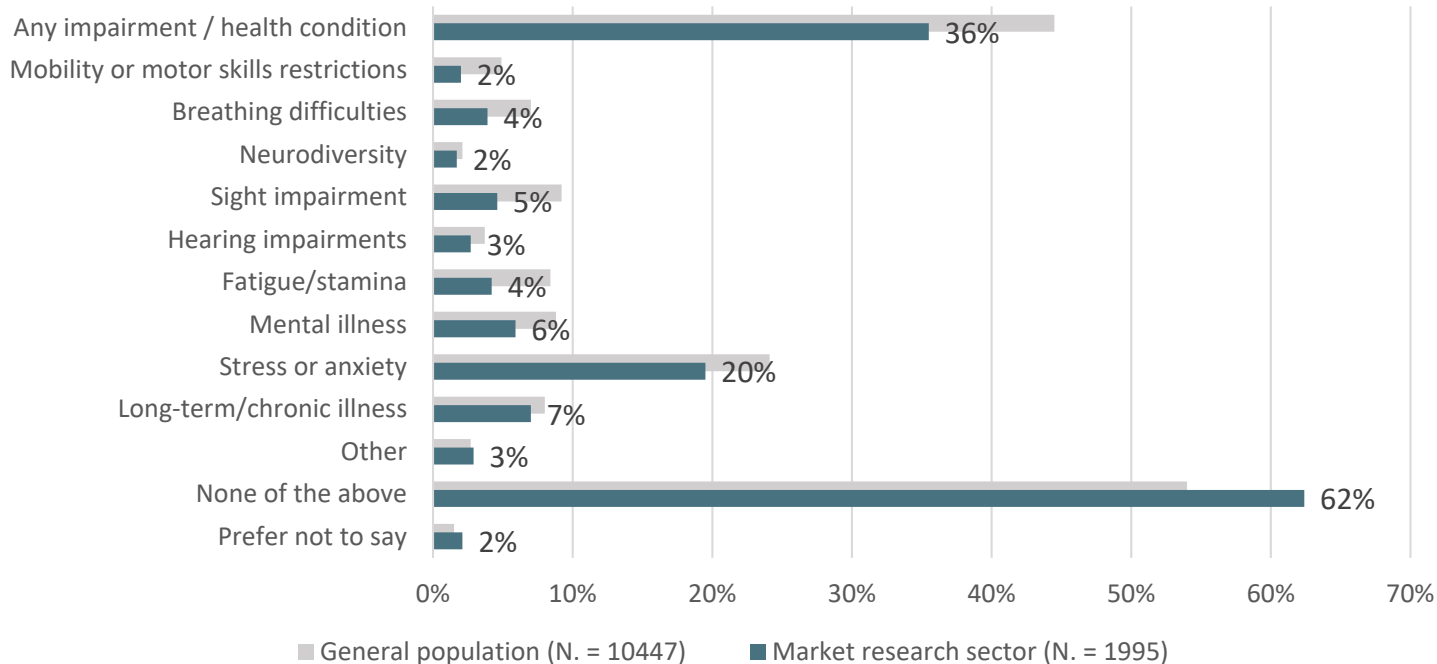
countries, Germany and the USA stand out as places where relatively many people in the general working population say they have breathing difficulties. This is not the case in the MR sector in those countries.

Around one-third of people with impairments / health conditions, both in and outside of the MR sector, say that their impairment/health condition has put them at a disadvantage when it comes to career progression. By country the proportion is highest in Australia and the UK.

In the MR sector, it is those with **mental illness** who are most likely (61%) to say that their health condition has put them at a disadvantage.

One-in-three people working in the MR sector say they suffer from at least one of the impairments / health conditions asked about. This is somewhat less than the proportion amongst the general population. As many as one-in-five people working in the MR sector say they have stress / anxiety.

Summary of Impairments / Health Conditions



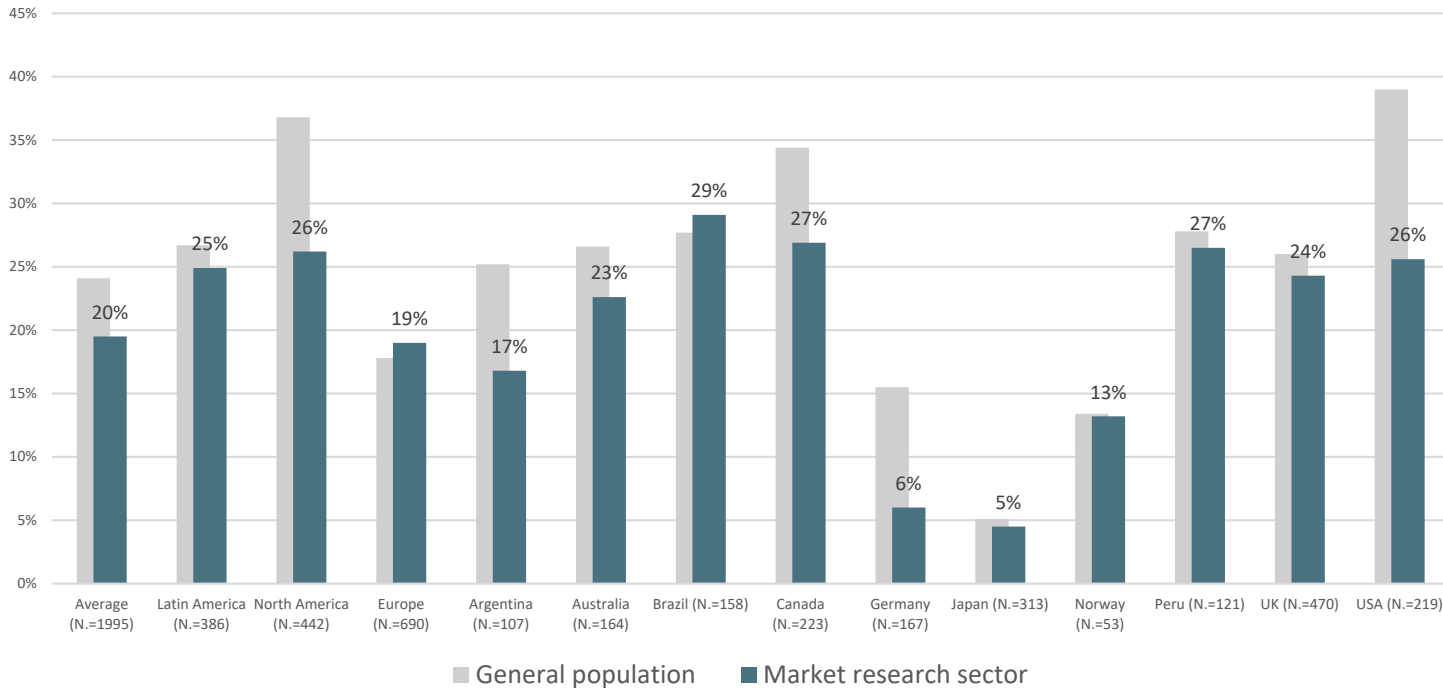
Base: All respondents.

Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

Stress and anxiety can be seen amongst those working in the MR sector in many countries. The exceptions are Germany, Japan and Peru, countries where the prevalence of stress / anxiety is also relatively low amongst the general population.

% saying they have Stress or anxiety - By Country



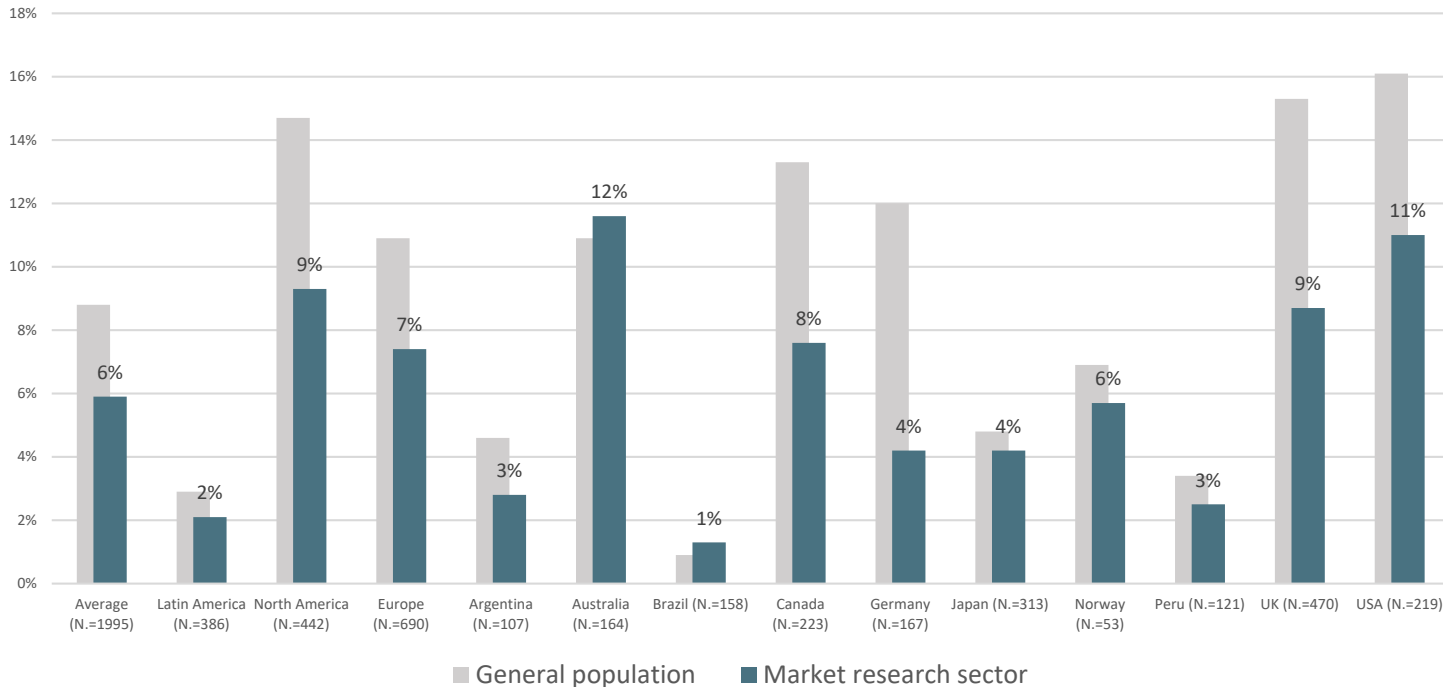
Base: All respondents.

Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

The proportion of people with mental illness working in the MR sector is relatively high in Australia, the US, the UK and Canada. Australia stands out as a country where the proportion in the MR sector equals that in the general population, whereas elsewhere it tends to be lower.

% saying they have Mental illness - By Country



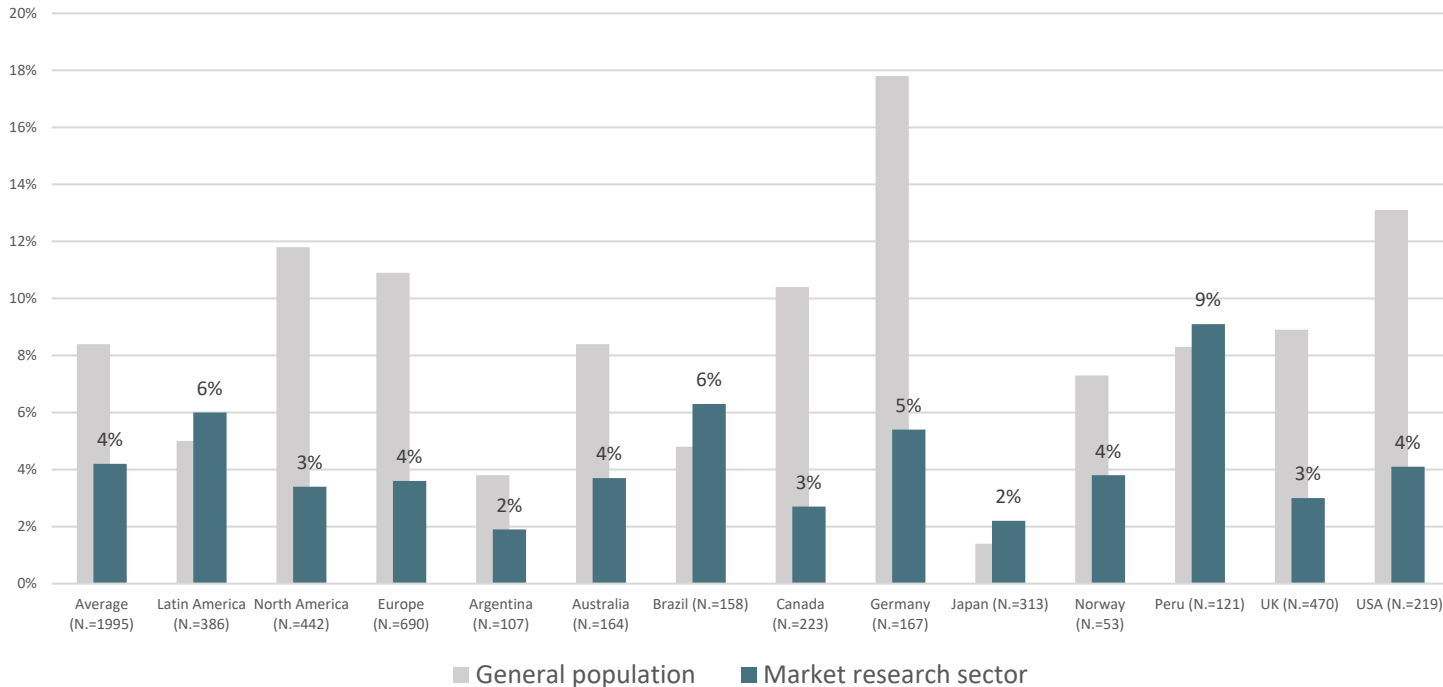
Base: All respondent.

Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

As a country, Germany stands out as a place where many people in the working population say they have fatigue / low stamina. This is not the case in the MR sector in Germany. In the MR sector, it is in Peru where the highest proportion of people say they have fatigue / low stamina.

% saying they have Fatigue/low stamina - By Country



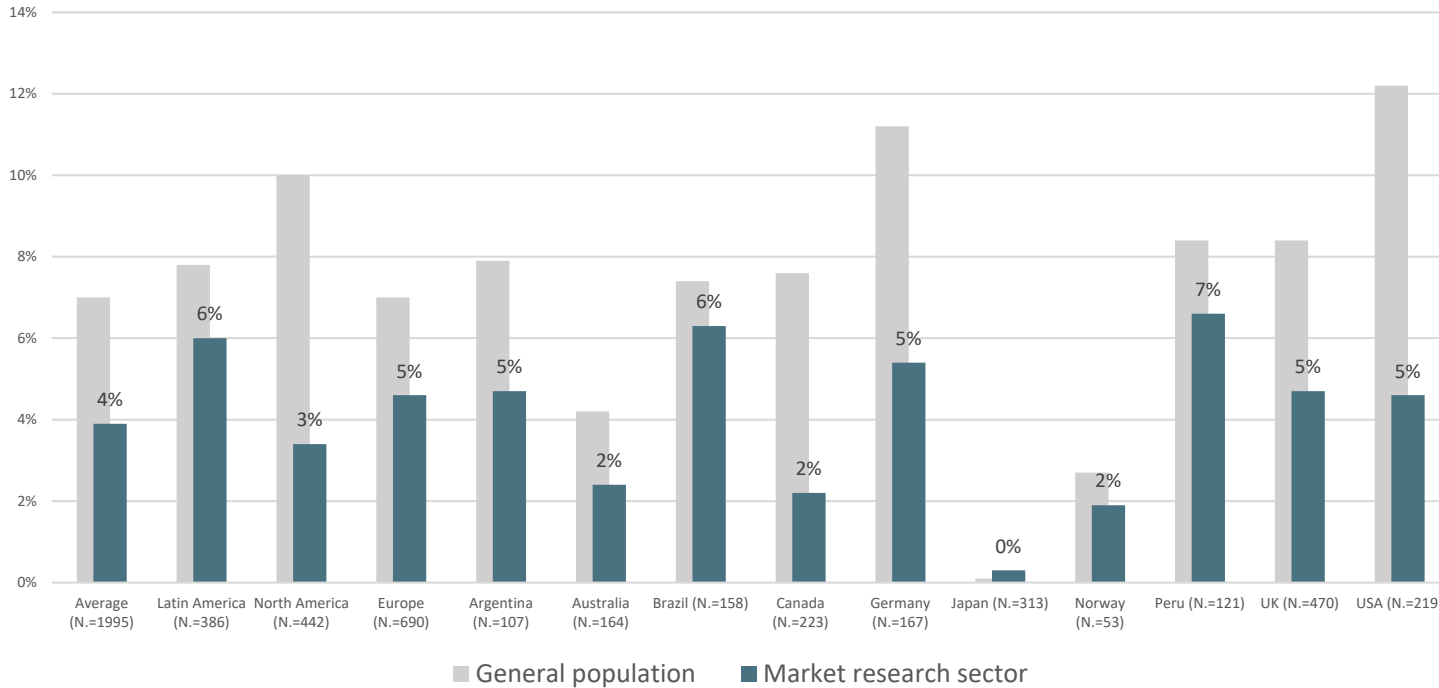
Base: All respondents.

Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

As countries, Germany and the USA stand out as places where relatively many people in the general working population say they have breathing difficulties. This is not the case in the MR sector in those countries.

% saying they have Breathing difficulties- By Country



Base: All respondent.

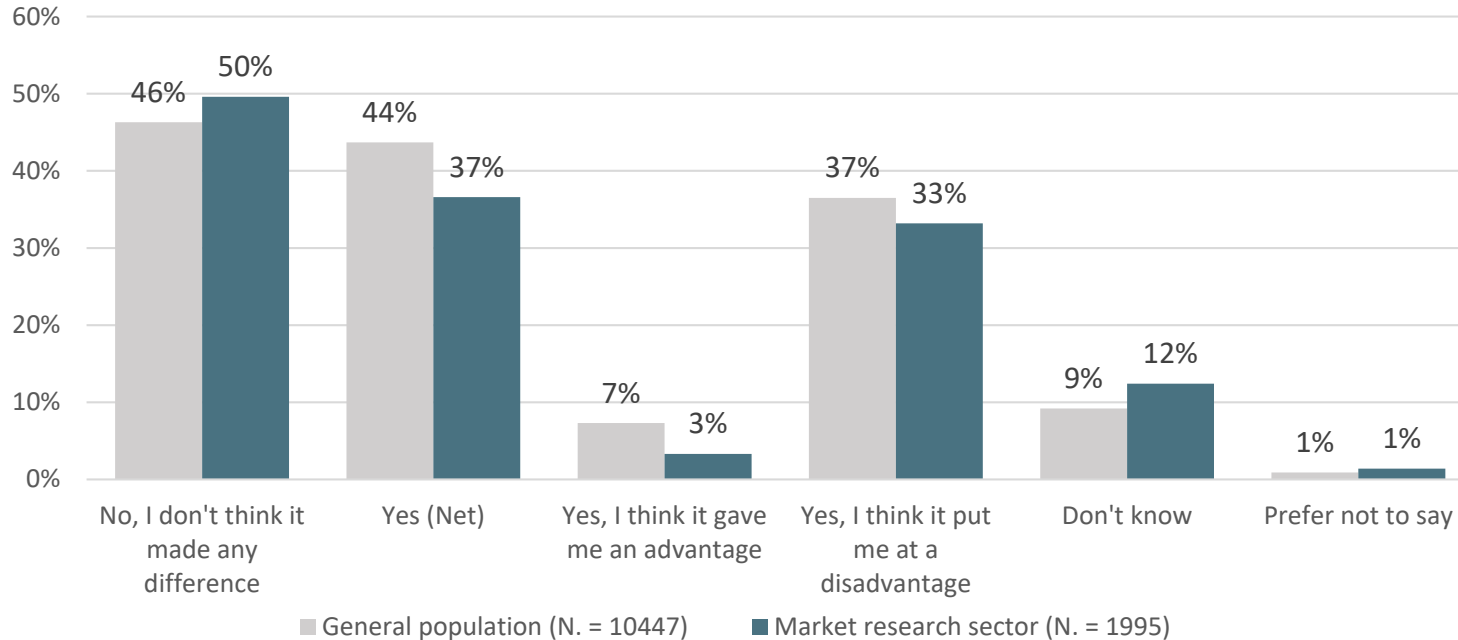
Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

Around one-third of people with impairments / health conditions, both in and outside of the MR sector, say that the health conditions have put them at a disadvantage when it comes to career progression.

Perceived impact of impairments and health conditions

- People with any condition



Base: People with impairments / health conditions.

Base numbers shown for Market Research Sector only.

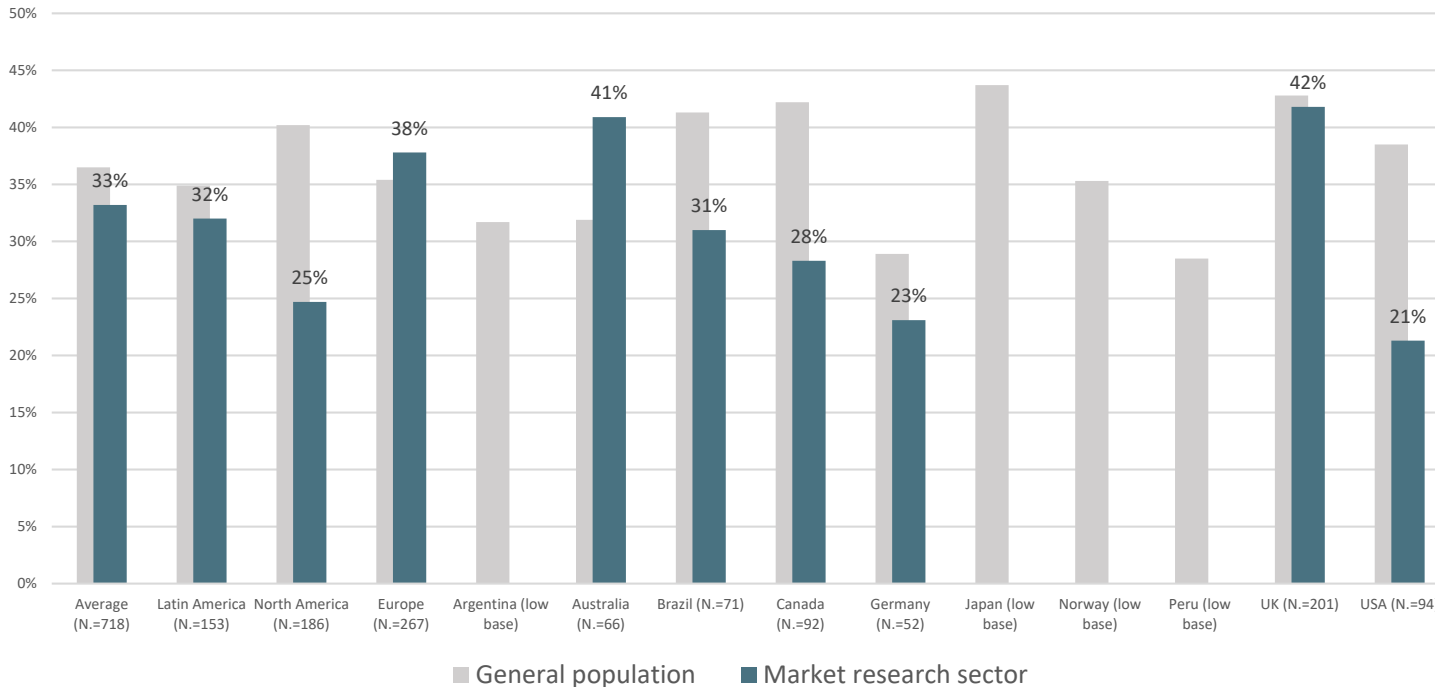
See Appendix for general population sample bases.

Around one-third of people with impairments / health conditions, both in and outside of the MR sector, say that the health conditions have put them at a disadvantage when it comes to career progression. The proportion is highest in Australia and the UK.

Perceived impact of impairments and health conditions – Put at a disadvantage

- People with any condition

% saying it put them at a disadvantage - By Country



Base: People with impairments / health conditions.

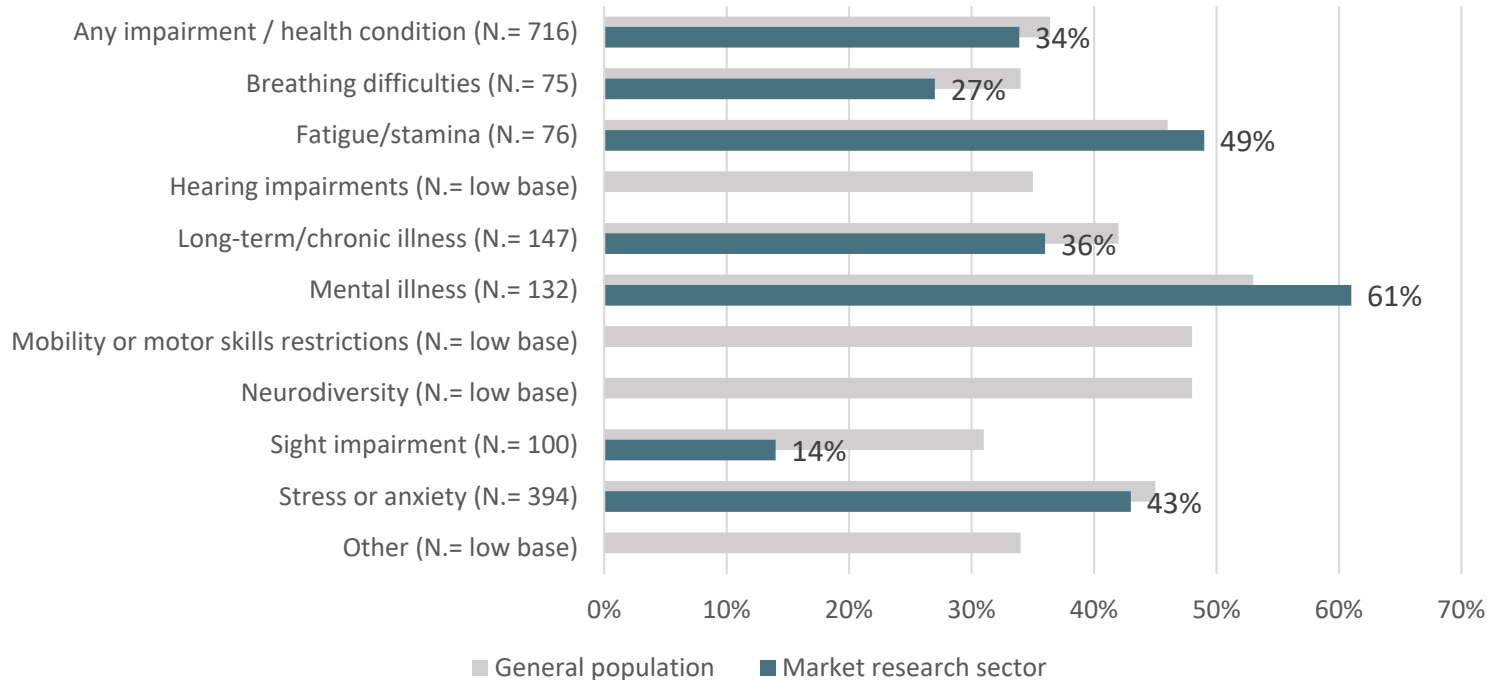
Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

In the MR sector, it is those with mental illness who are most likely to say that their health condition has put them at a disadvantage.

Perceived impact of impairments and health conditions

% saying it put them at a disadvantage - By impairments and health conditions



Base: All respondent

. Base numbers
shown for Market
Research Sector
only.

See Appendix for
general population
sample bases.



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PARENTAL
LEAVE

PARENTAL LEAVE

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KEY FINDINGS

PARENTAL LEAVE

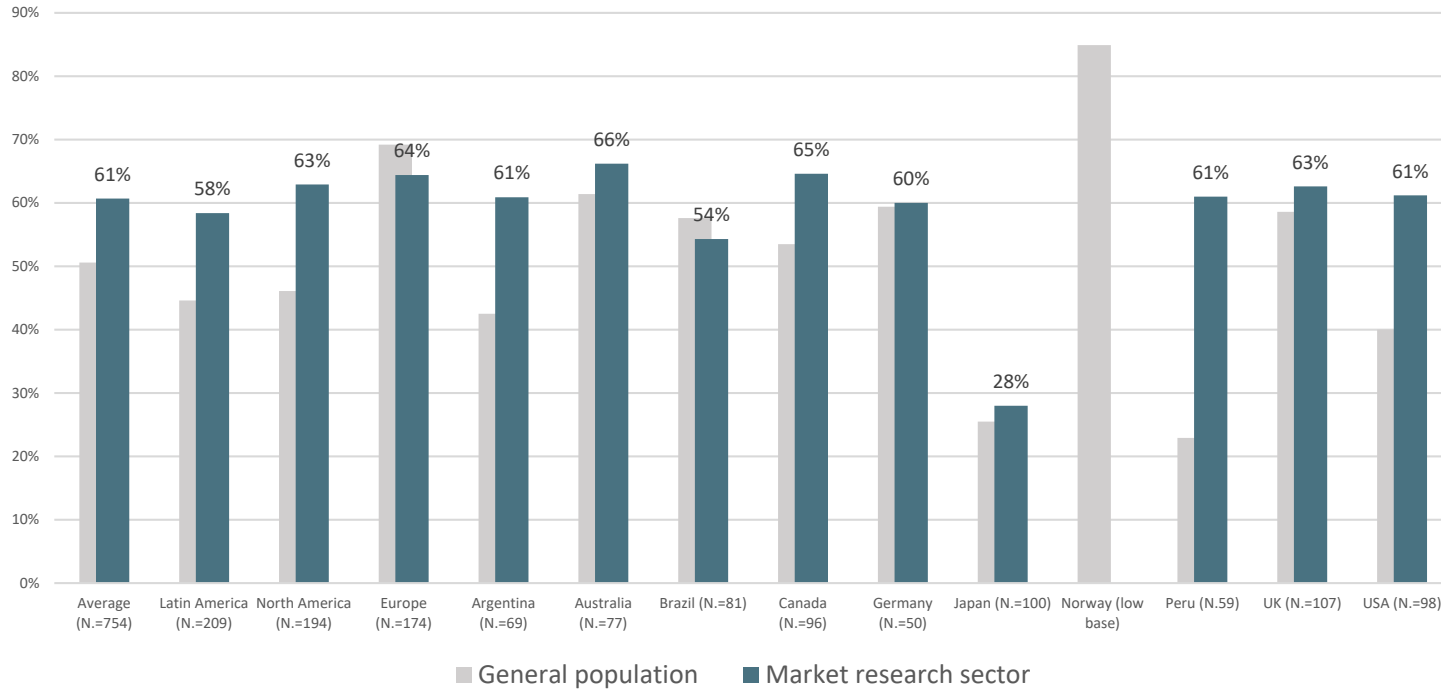
The proportion of people with children, working in the MR sector, who have taken parental leave is very consistent across countries, at around six-in-ten, which is somewhat higher than the proportion amongst the general population (one-in-two). The exception is Japan where only around one-in-four parents in the MR sector have done so. The low incidence of parental leave is also clearly noticeable amongst the general population in Japan. Argentina and Peru stand out as countries where the taking of parental leave is much more common in the MR sector than amongst the general population.

One-quarter of people working in the MR sector who have taken parental leave believe that doing so put them at a disadvantage when it comes to career progression. This is a higher proportion than in the general population.

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% who have taken parental leave - By Country

- People with children



Base: People with children.

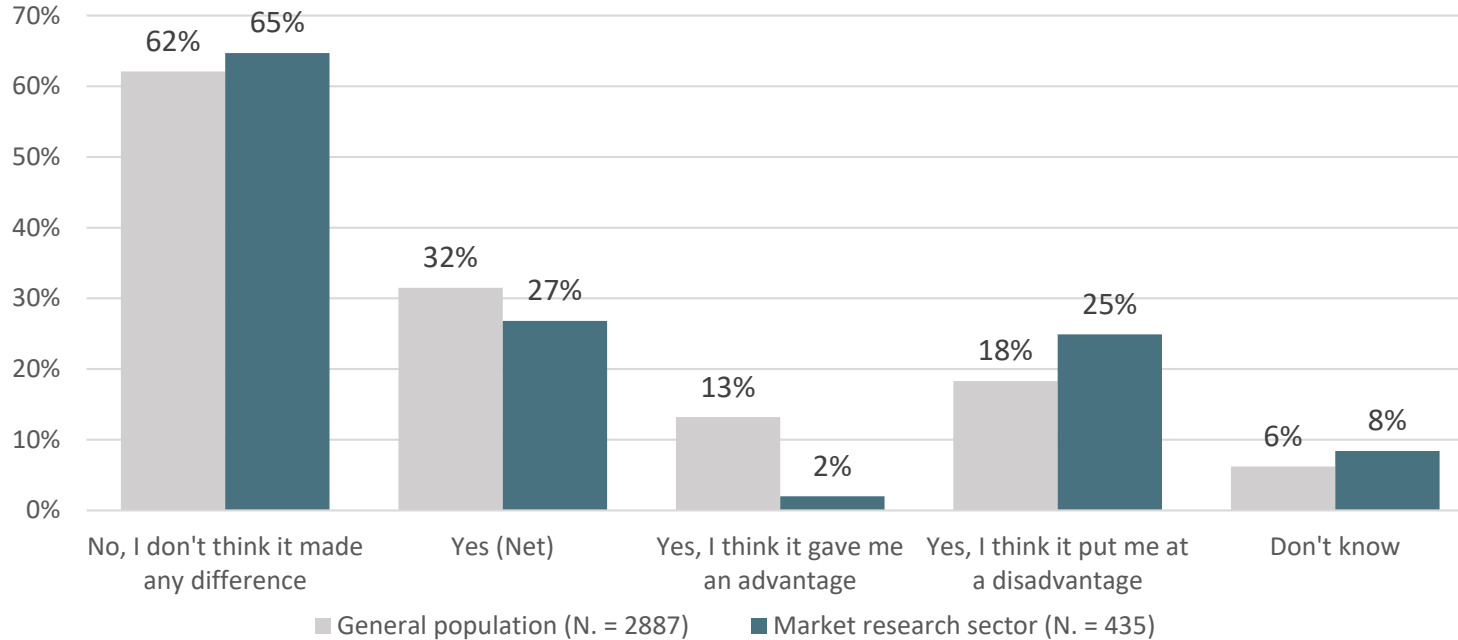
Base numbers shown for Market Research Sector only.

See Appendix for general population sample bases.

One-quarter of people working in the MR sector who have taken parental leave believe that doing so put them at a disadvantage when it comes to career progression. This is a higher proportion than in the general population.

Perceived impact of taking parental leave

- People who have taken parental leave



Base: People who have taken parental leave



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APPENDICES

APPENDICES

The table below shows the bases for general population by country:

	Total (Average across countries)	Latin America (Argentina / Brazil / Peru)	North America (Canada / USA)	Europe (Germany / Norway / UK)	Argentina	Australia	Brazil	Canada	Germany	Japan	Norway	Peru	UK	USA
Total	10447	2596	2126	3682	1070	1006	1088	1025	1095	1037	1488	438	1099	1101
Those who have more than 1 employee working in their company or are not self-employed.	8735	1531	1890	3420	694	930	617	905	1000	963	1417	220	1003	984
People with impairments / health conditions	4612	1133	1188	1661	478	468	449	543	597	161	539	206	525	645
People with children	5392	1549	1036	1879	654	503	600	473	528	425	742	295	610	563

APPENDICES

The table below shows the bases for general population by breaks:

	Total	Industry														
		Accommodation and Food Services	Agriculture, Forestry, Fishing and Hunting	Construction	Consumer Goods and Services	Educational Services	Finance and Insurance	Government	Healthcare and Social Assistance	Manufacturing	Professional Services (Legal, IT Services, Management Consulting, etc.)	Real Estate and Rental and Leasing	Technology	Transportation	Utilities	Other industry
Total	10447	518	170	667	830	842	556	730	1223	804	690	141	641	471	316	1508
Those who have more than 1 employee working in their company or are not self-employed.	8735	401	116	506	658	759	503	708	1118	747	548	98	542	414	270	1137
People with impairments / health conditions	4612	256	88	284	400	383	269	295	613	265	284	60	271	204	145	684
People with children	5392	258	88	382	417	463	292	369	618	448	370	83	338	249	168	685

APPENDICES

The tables below shows the bases for general population by breaks:

	Total	Gender Identity 3 (Includes all countries except Australia and Peru)			Sexual orientation		Gender Identity 3 (Includes all countries except Australia and Peru)					
		Cisgender female	Cisgender male	Not cisgender female or male	Heterosexual	LGBTIQA+	Heterosexual Cisgender Female	Heterosexual Cisgender Male	Heterosexual Not cisgender female or male	LGBTIQA+ Cisgender Female	LGBTIQA+ Cisgender Male	LGBTIQA+ Not cisgender female or male
Total	10447	5110	5082	255	8443	1683	4069	4250	124	877	698	107
Those who have more than 1 employee working in their company or are not self-employed.	8735	4233	4322	179	7147	1370	3414	3646	88	705	585	80
People with impairments / health conditions	4612	2524	1932	156	3603	921	1957	1577	69	531	317	74
People with children	5392	2657	2579	157	4456	782	2132	2242	82	442	285	55

	Impairments or health conditions												Impairments or health conditions	Impact of impairment(s) or health condition(s) on career progression		
	Mobility or motor skills restrictions	Breathing difficulties	Neurodiversity	Sight impairment	Hearing impairments	Fatigue/stamina	Mental illness	Stress or anxiety	Long-term/chronic illness	Other	None of the above	Prefer not to say		Any	No difference	Advantage
Total	509	714	225	927	385	879	948	2450	856	282	5687	148	4612	2171	353	1679
Those who have more than 1 employee working in their company or are not self-employed.	411	589	183	770	333	761	829	1994	703	222	4812	116	3806	1830	302	1359
People with impairments / health conditions	509	714	225	927	385	879	948	2450	856	282	0	0	4612	2171	353	1679
People with children	282	383	121	500	220	471	430	1256	408	136	2963	65	2364	1156	226	793

APPENDICES

The table below shows the bases for general population by breaks:

	Age group 2			Children in household 1					Children in household 2	Taken parental leave		Impact of parental leave on career progression		
	18-34	35-54	55-64	Children under 6 years old	Children 6 to 12 years old	Children 13 to 17 years old	Adult children, 18+ years old	I do not have any children living in household	Children under 18 years old	Yes	No	No difference	Advantage	Disadvantage
Total	3861	4657	1927	1795	2037	1705	1472	4933	4345	2887	2459	1906	352	502
Those who have more than 1 employee working in their company or are not self-employed.	3203	3937	1594	1503	1739	1425	1207	4166	3634	2569	1897	1711	312	438
People with impairments / health conditions	1857	1951	804	769	882	824	602	2185	1944	1312	1033	745	215	303
People with children	1571	3045	776	1795	2037	1705	1472	0	4345	2887	2459	1906	352	502

APPENDICES

The table below shows the bases for general population by breaks:

	Does NOT believe that everyone has the same opportunities to progress and is rewarded fairly by:											Does everyone have the same opportunities				
	Age	Gender	Family Status	Ethnicity/Race/Nationality/migration background/skin colour	National Origin	Nationality/migration background/skin colour [DE]	Religion	Country of Birth	Disability Status	Sexual Orientation/Gender Identity	Social Class	Yes - All	Yes - Any	No - Any	No - three or more	No - All
Total	2874	2295	1909	2172	1803	222	1493	204	3433	1842	1929	3037	9318	5744	3093	364
Those who have more than 1 employee working in their company or are not self-employed.	2363	1845	1516	1723	1400	202	1143	180	2784	1407	1481	2645	7880	4722	2460	271
People with impairments / health conditions	1344	1123	970	1042	829	118	729	122	1674	919	1041	1247	4163	2773	1561	152
People with children	1493	1203	1046	1148	939	111	792	108	1778	994	1032	1615	4899	3037	1638	176

APPENDICES

The table below shows the bases for general population by breaks:

	Personally experienced discrimination				Personally experienced discrimination bases										
	Yes - All	Yes - Any	No - Any	No - All	Age	Gender	Family Status/caring responsibility	Ethnicity/Race/skin colour	Nationality/migration background/skin	National Origin	Country of Birth	Religion/fait h/beliefs	Disability/impairment/health condition	Sexual Orientation/gender Identity	Social Class
Total	164	5066	8183	2615	1521	1201	616	602	140	333	57	486	521	441	566
Those who have more than 1 employee working in their company or are not self-employed.	164	5066	8183	2615	1521	1201	616	602	140	333	57	486	521	441	566
People with impairments / health conditions	100	2544	3581	901	842	699	363	331	84	171	26	291	399	249	335
People with children	98	2671	4211	1332	764	638	400	355	68	223	34	299	296	240	324

APPENDICES

The table below shows the bases for general population by breaks:

	Witnessed discrimination				Witnessed discrimination bases										
	Yes - All	Yes - Any	No - Any	No - All	Age	Gender	Family Status/caring responsibility	Ethnicity/Race/skin colour	Nationality/migration background/skin	National Origin	Country of Birth	Religion/faith/beliefs	Disability/impairment/health condition	Sexual Orientation/gender Identity	Social Class
Total	266	4512	8039	3397	1236	1284	568	727	128	396	56	487	500	491	600
Those who have more than 1 employee working in their company or are not self-employed.	266	4512	8039	3397	1236	1284	568	727	128	396	56	487	500	491	600
People with impairments / health conditions	150	2306	3509	1198	697	754	338	413	82	210	35	295	333	293	340
People with children	162	2401	4136	1708	681	716	359	406	65	240	33	285	276	276	340

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GRBN DEI and other global industry initiatives

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