

The Global DEI Census 2023

Poland market report



Acknowledgements

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



Acknowledgements

- Recognition of partners in Poland
- Each country to add

Code of conduct

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

In return, we all need to recognise the sensitive nature of the data and to treat it appropriately.

By accessing this data, you are agreeing to abide by the following Code of Conduct:

Do:

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

Don't:

- Share sensitive data outside of your organisation – or make any comparison between your national data and other countries/markets

If you are unsure, please contact your WFA/VoxComm colleagues if you have any queries.

Headlines

Diversity Headlines

There is relatively good representation across all minority groups (gender, ethnicity, religion, disability, sexual orientation) compared to market census data. Looking at seniority and indicative pay gaps, the proportion of women and ethnic minorities decreases at senior levels, and there appears to be a sizable pay gap particularly for women at junior levels.

Inclusion Headlines

Poland scores below the global Inclusion Index benchmark (57% vs 63%), with 54% agreeing that their company is actively taking steps to be more diverse and inclusive (vs 72% global average). 32% of respondents agree things have improved in terms of the industry becoming more diverse and inclusive in the last 2 years (vs 50% global average).

Cost of turnover data shows that there is a potential risk of churn with 11% of respondents either indicating they are likely to leave the industry based on a lack of inclusion and diversity or preferring not to answer this question. This rises to 29% for ethnic minorities.

Sense of belonging is lower for minority respondents across all protected characteristics with the exception of LGBTQ+ respondents.

51% of respondents report often being very stressed at work and 42% report that their work is having a negative impact on their physical health.

24% of respondents believe that age can be a hindrance at their company, this increases amongst older age groups, eg 50% for 65+. We see a similar picture with family status with 53% of those who have dependent children indicating they believe that family status hinders one's career at their company.

1. Demographics and Index Overview



Poland

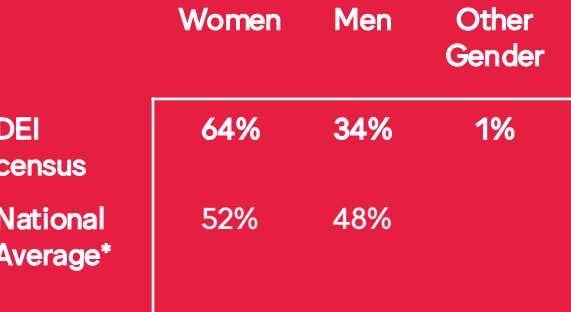
OVERALL RESPONSES = 1,251

| Company type | % |
|--|----|
| Brand (e.g., P&G, Unilever, Walmart, etc.) | 9 |
| Creative agency | 28 |
| Media agency | 20 |
| Media | 7 |
| Industry association / Trade body | 2 |
| Production House | 5 |
| Photography / Sound / Music Studio | - |
| Publisher | 1 |
| Research/Insights agency | 6 |
| I am a freelancer | 2 |
| PR agency | 2 |
| Digital agency | 11 |
| Tech | 3 |
| Other | 5 |

| Role / Function | % |
|--|----|
| Executive Management / C-Suite | 15 |
| New Business / Marketing / Communications / PR | 15 |
| Sales / Commercial | 2 |
| Account Management / Client Services | 9 |
| Account Planning and Strategy | 11 |
| Research / Information / Insight | 6 |
| Data Analytics and Planning | 5 |
| Social Media / Communities | 3 |
| Programming / Ad Tech | 1 |
| Creative, Design, and Studio | 9 |
| Creative Services / Project Management | 7 |

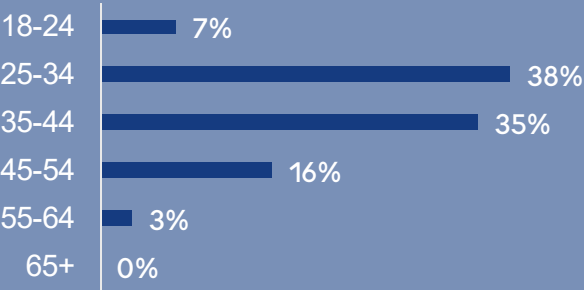
| Role / Function | % |
|---|---|
| Production / Production Administration / Art and Print Buying | 2 |
| Media | 7 |
| Events | * |
| Finance | 1 |
| Human Resources and Training | 2 |
| IT / Technology | 3 |
| Procurement / Operations | * |
| Legal | * |
| Office Services | 1 |
| Other | 2 |
| | |

Gender

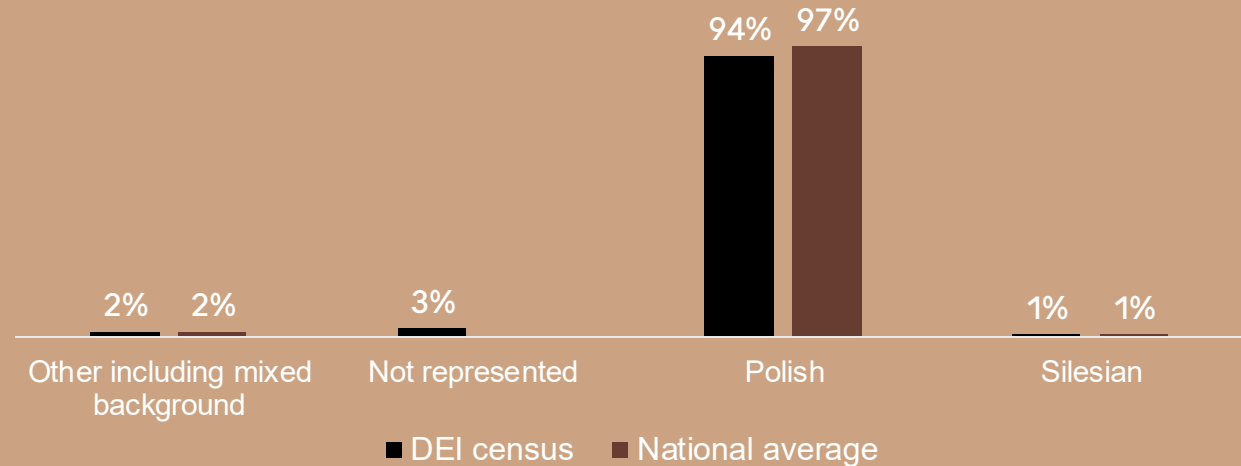


*taken from national census data

Age



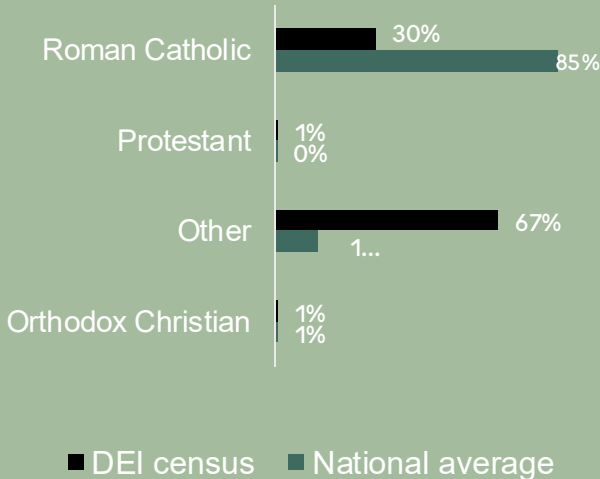
Ethnicity



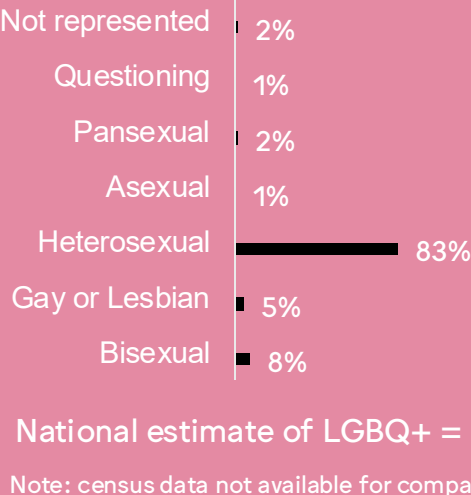
Disability Status

19%
of respondents are disabled
Compared to 12% national average

Religion



Sexual Orientation



Caregiving

33% of respondents are
parents to children under 16

23% of respondents
provide care for someone else

About the Inclusion Index

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

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

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

The Inclusion Index Score is the following formula:



*Note this will vary by market depending on questions asked

Inclusion Index

| | Overall Inclusion Index |
|---------------------|-------------------------|
| Poland 2023 survey | 57% |
| Global average 2023 | 63% |
| Poland 2021 survey | N/A |

| | Sense of Belonging | Absence of Discrimination | Presence of Demeaning Behaviour |
|---------------------|--------------------|---------------------------|---------------------------------|
| Poland 2023 survey | 57% | 96% | 20% |
| Global average 2023 | 69% | 96% | 19% |
| Poland 2021 survey | N/A | N/A | N/A |

2.

Attitudes towards Diversity and Inclusion in the Workplace and the Industry



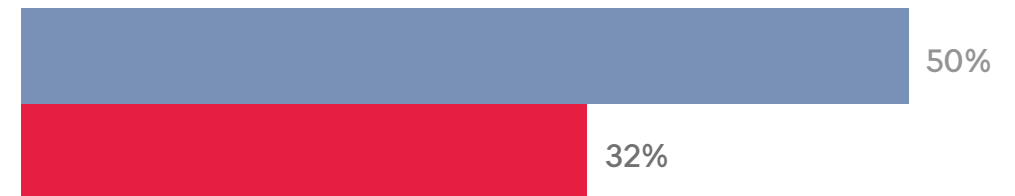
Poland

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



■ Global average ■ Poland 2023 survey

Respondents agreeing things have improved in terms of the industry becoming more diverse and inclusive in the last 2 years

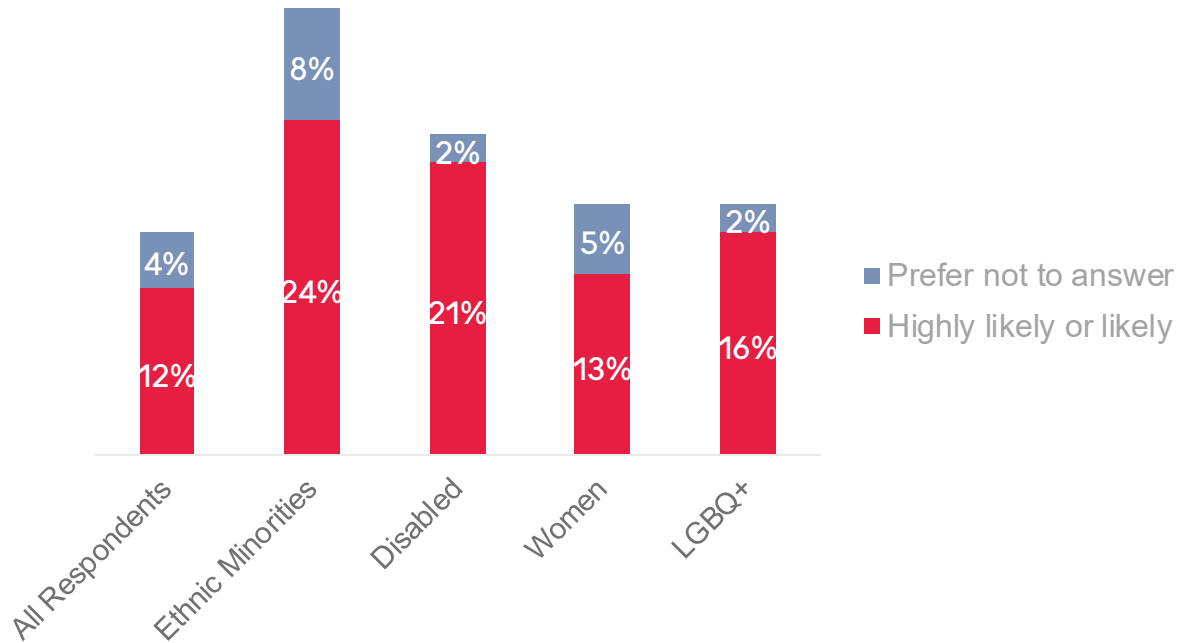


■ Global average

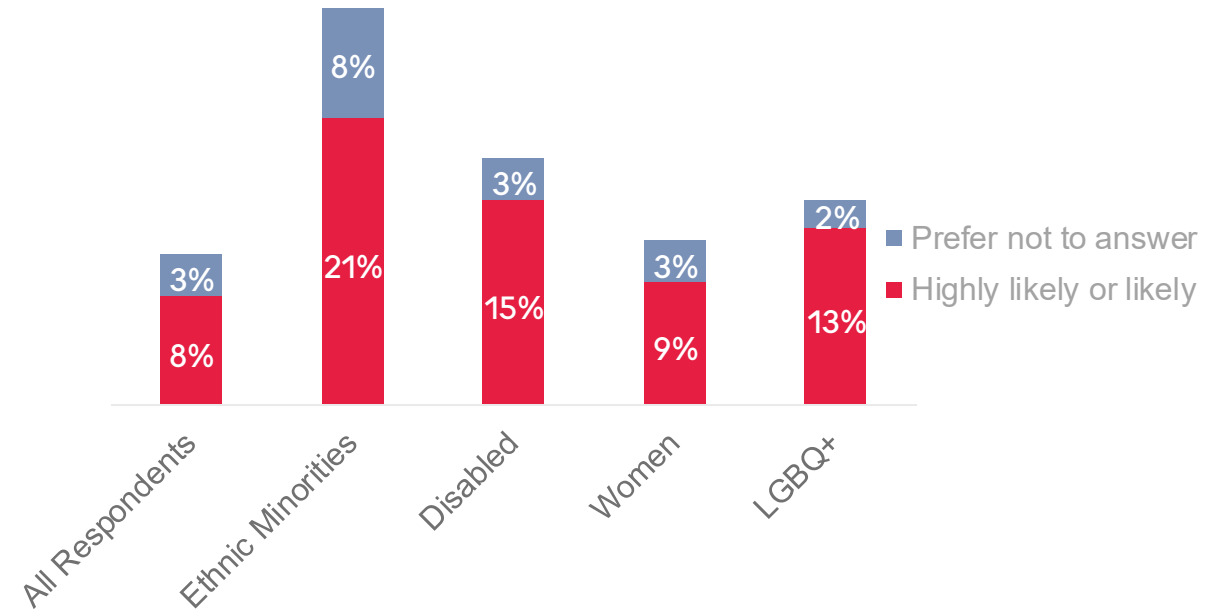
Poland

Potential Cost of Turnover

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



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



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



3.

Key take-outs:

Gender, Ethnicity, Disability, Sexual Orientation, Religion, Age, Family Responsibilities

Key Metrics

Experiences of discrimination

“At my company, I have personally experienced negative behaviour or discrimination based on my...”

Escalation

“I believe that most colleagues would escalate inappropriate behaviour to senior management or HR”

Sense of Belonging

“I feel like I belong at my company”

Career obstacles

“I have faced obstacles in my career progression in this company which I believe are due to who I am”

Poland Headlines

Experiences of discrimination

Experiences of discrimination is generally low amongst respondents, with women respondents (12%) and ethnic minorities (14%) reporting the highest levels of discrimination.

Escalation

Female and disabled respondents were less likely to believe that inappropriate behaviour would be escalated to senior leadership and HR

Sense of belonging

Sense of belonging is lower for minority respondents across all protected characteristics with the exception of LGBTQ+ respondents.

Career obstacles

All minority respondents reported facing obstacles in their career because of who they are, with ethnic minorities (25%) and disabled respondents (25%) most impacted

Gender in Poland

12%

Of female respondents have experienced discrimination at their company based on their gender vs 6% global average. 11% of all respondents have witnessed discrimination towards others due to their gender.

45%

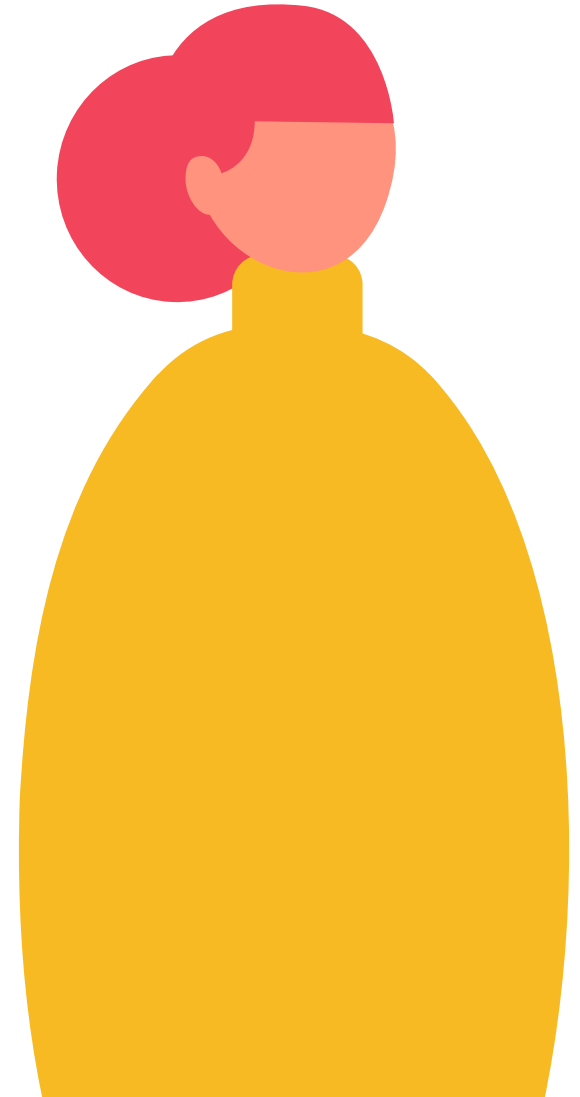
Of female respondents believe that most colleagues would escalate inappropriate behaviour to senior management or HR, compared to 52% of men.

63%

Of female respondents feel like they belong at their company, compared to 69% of men.

16%

Of female respondents believe they have faced obstacles in their career progression at their company due to who they are, compared to 10% of men.



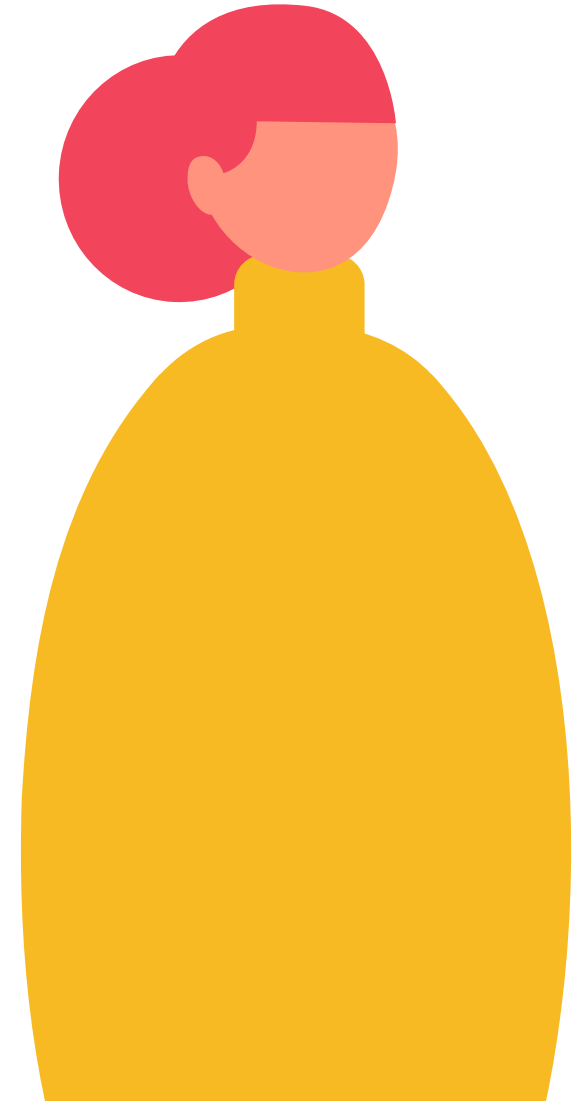
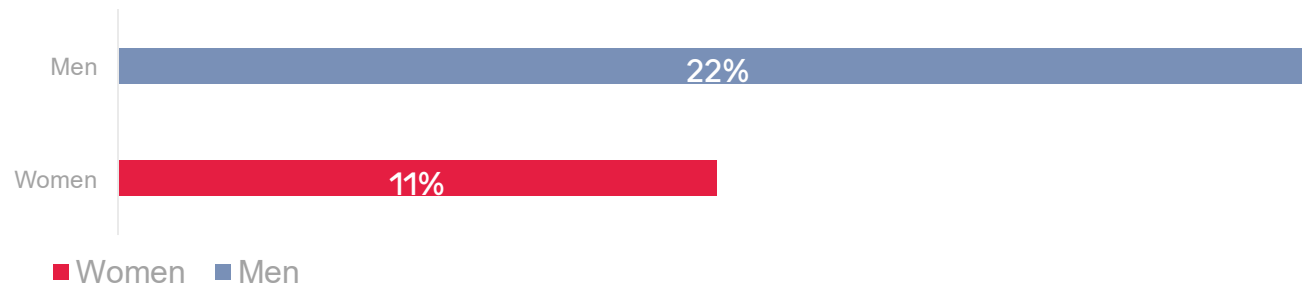
Gender in Poland

Average Pay by Gender

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

| Level | Men average salary | Women average salary | % Gap |
|-------------------------|--------------------|----------------------|-------|
| Exec management/c-suite | Zł 16,623 | Zł 16,436 | -1% |
| Other senior staff | Zł 14,010 | Zł 12,754 | -9% |
| Manager | Zł 9,493 | Zł 7,887 | -17% |
| Junior | Zł 7,984 | Zł 6,091 | -24% |

% C-suite by Gender



Ethnicity in Poland

14%

Of ethnic minority respondents have experienced discrimination at their company based on their ethnic background. 3% of all respondents have witnessed discrimination towards others due to their ethnicity.

52%

Of ethnic minority respondents believe that most colleagues would escalate inappropriate behaviour to senior management or HR, compared to 47% of ethnic majority respondents.

55%

Of ethnic minority respondents feel like they belong at their company, compared to 65% of ethnic majority respondents.

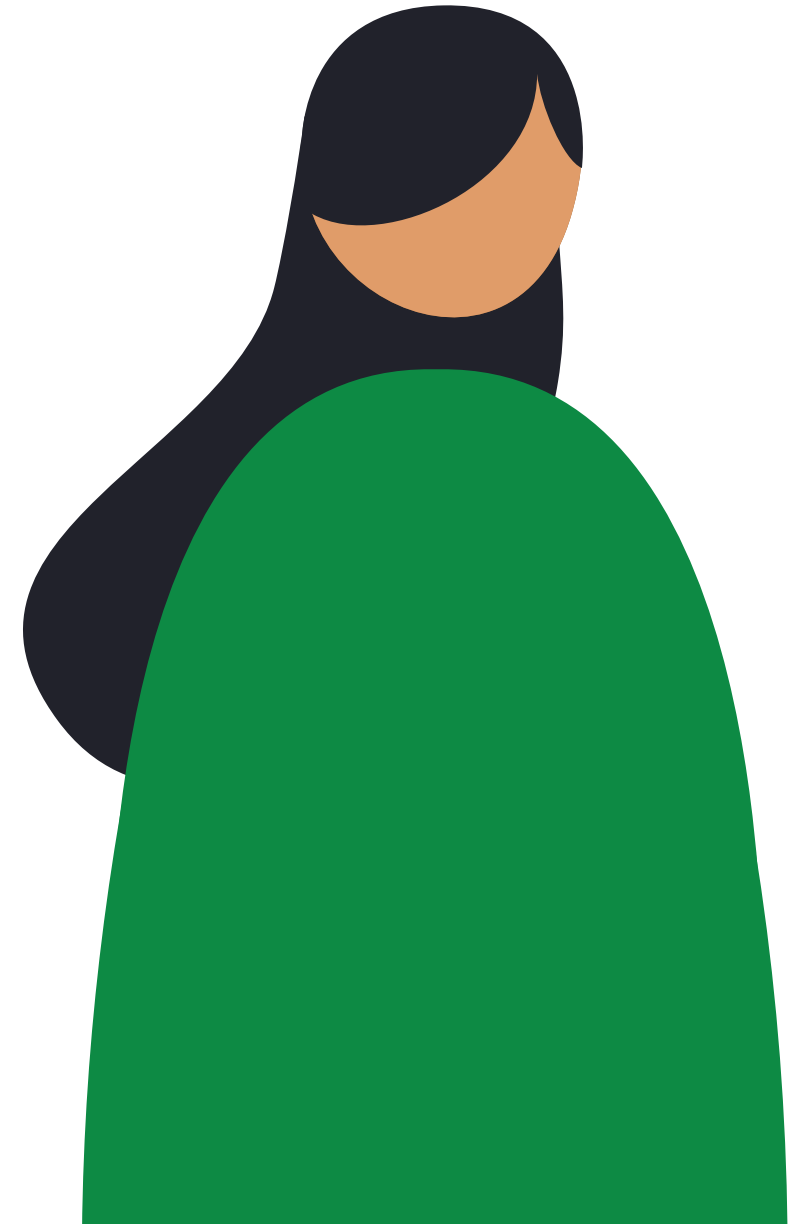
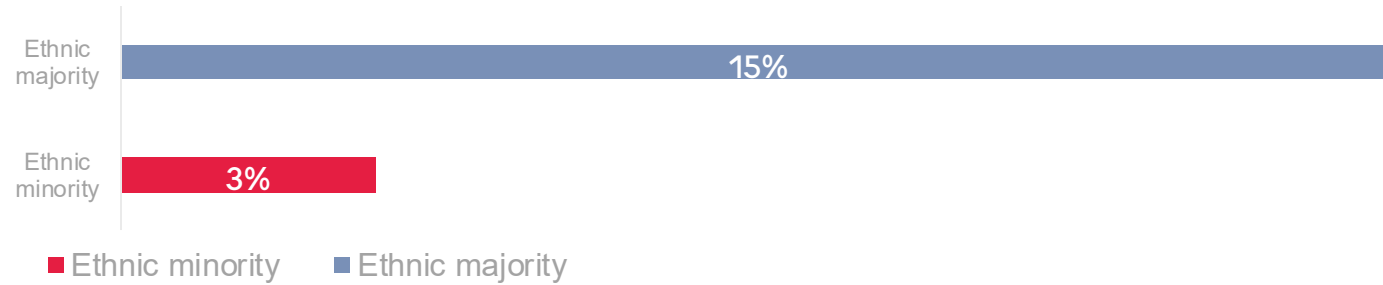
25%

Of ethnic minority respondents believe they have faced obstacles in their career progression at their company due to who they are, compared to 13% of ethnic majority respondents.



Ethnicity in Poland

% C-suite by Ethnicity



Disability in Poland

1%

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

45%

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

55%

Of respondents with disabilities feel like they belong at their company, compared to 69% of their counterparts without disabilities.

25%

Of respondents with disabilities believe they have faced obstacles in their career progression at their company due to who they are, compared to 11% of their counterparts without disabilities.



Conditions reported by those with a disability* in Poland

| Condition | % |
|---|----|
| Mobility impairments (e.g. amputation, paralysis, multiple sclerosis, muscular dystrophy, arthritis, spinal cord injury) | 7 |
| Fatigue / lack of stamina | 33 |
| Breathing capacity (e.g. asthma, COPD) | 9 |
| Neurodiversity (e.g. autism, Asperger's syndrome, dyslexia, dyscalculia, dyspraxia, ADHD, obsessive-compulsive disorder (OCD), Tourette syndrome) | 27 |
| Visual impairments (e.g. poor vision, colour blindness) | 13 |
| Motor skill impairments (e.g. arthritis, strokes, dexterity) | 3 |
| Mental health (e.g. depression, bipolar) | 57 |
| Stress / anxiety | 56 |
| Hearing impairments | 4 |
| Long-term implications from COVID | 9 |
| Other | 14 |
| None of the above | 2 |

* Disability is defined as any physical or mental health condition lasting or expected to last 12 months or more that reduces or affects your ability to carry out day to day activities

Mental health overview in Poland

51%

Of respondents report often being very stressed at work.

42%

Of respondents report that their work is having a negative impact on their **physical** health.

32%

Of respondents agree that their company has an active policy to minimise the risk of mental health issues.

47%

Of respondents agree that their workplace is open about mental health.

40%

Of respondents report that their work is having a negative impact on their **mental** health.

17%

Of respondents agree that mental health issues are seen as a sign of weakness in their workplace.

Sexual Orientation in Poland

7%

Of LGBTQ+ respondents have experienced discrimination at their company based on their sexual orientation. 6% of all respondents have witnessed discrimination towards others due to their sexual orientation.

52%

Of LGBTQ+ respondents believe that most colleagues would escalate inappropriate behaviour to senior management or HR compared to 48% of their heterosexual counterparts.

67%

Of LGBTQ+ respondents feel like they belong at their company, compared to 65% of their heterosexual counterparts.

17%

LGBTQ+ respondents believe they have faced obstacles in their career progression at their company due to who they are, compared to 13% of their heterosexual counterparts.



Religion in Poland

1%

Of religious minority respondents have experienced discrimination at their company based on their religious background. 4% of all respondents have witnessed discrimination towards others due to their religion.

48%

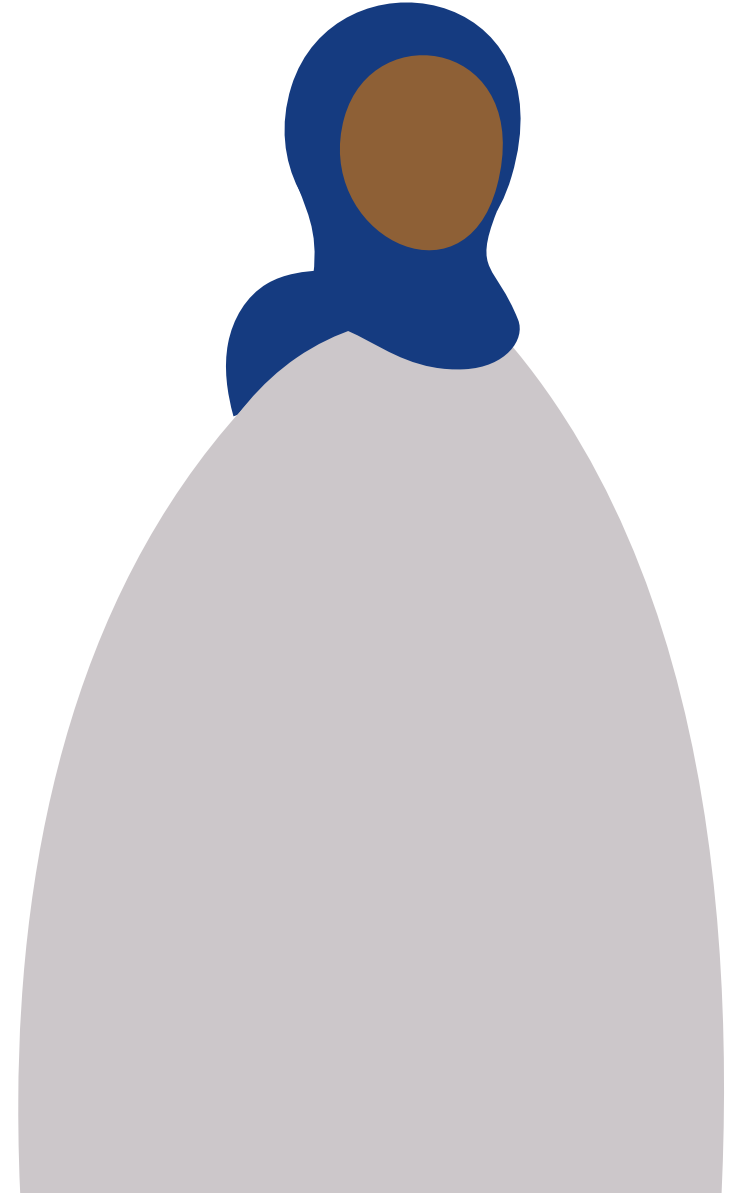
Of religious minority respondents believe that most colleagues would escalate inappropriate behaviour to senior management or HR, compared to 46% of their religious majority counterparts.

64%

Religious minority respondents feel like they belong at their company, compared to 67% of their religious majority counterparts.

14%

Religious minority respondents believe they have faced obstacles in their career progression at their company due to who they are, compared to 13% of their religious majority counterparts.



Age in Poland

8%

Of respondents have personally experienced discrimination due to their age.

24%

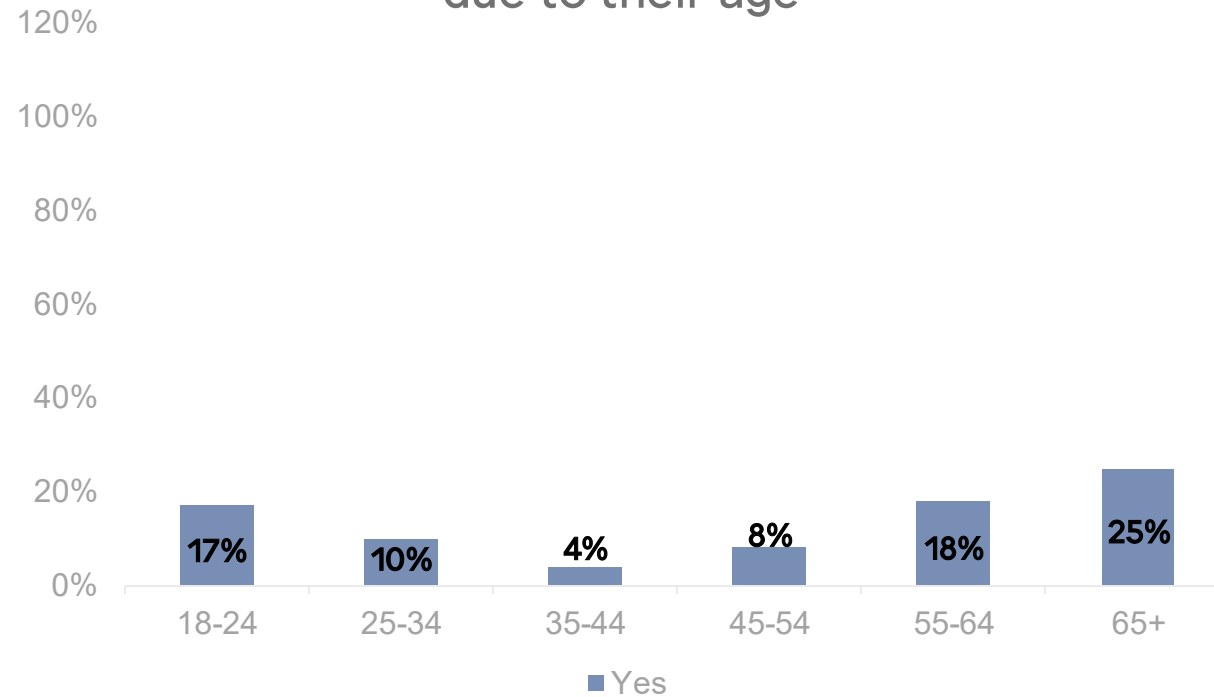
Of respondents believe that age can hinder one's career at their company.

8%

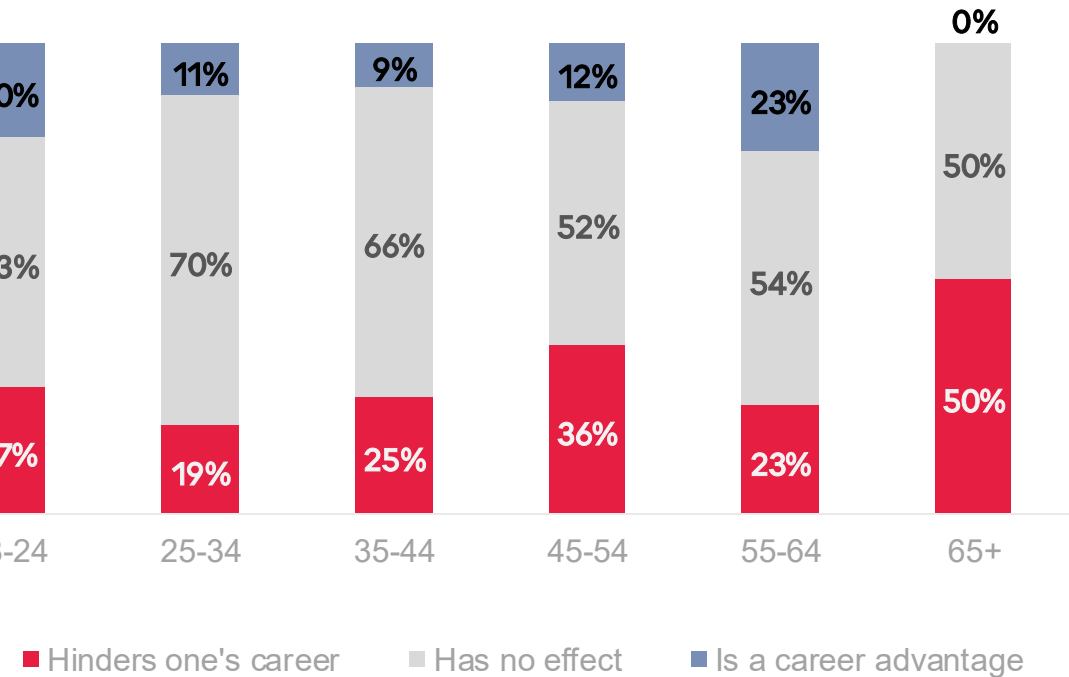
Of women respondents have personally experienced discrimination due to their age, compared to 8% of men.

Perceptions of Ageism in Poland

% personally experienced discrimination due to their age



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



Family Responsibilities in Poland

6%

Of respondents have personally experienced discrimination due to their family responsibilities.

43%

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

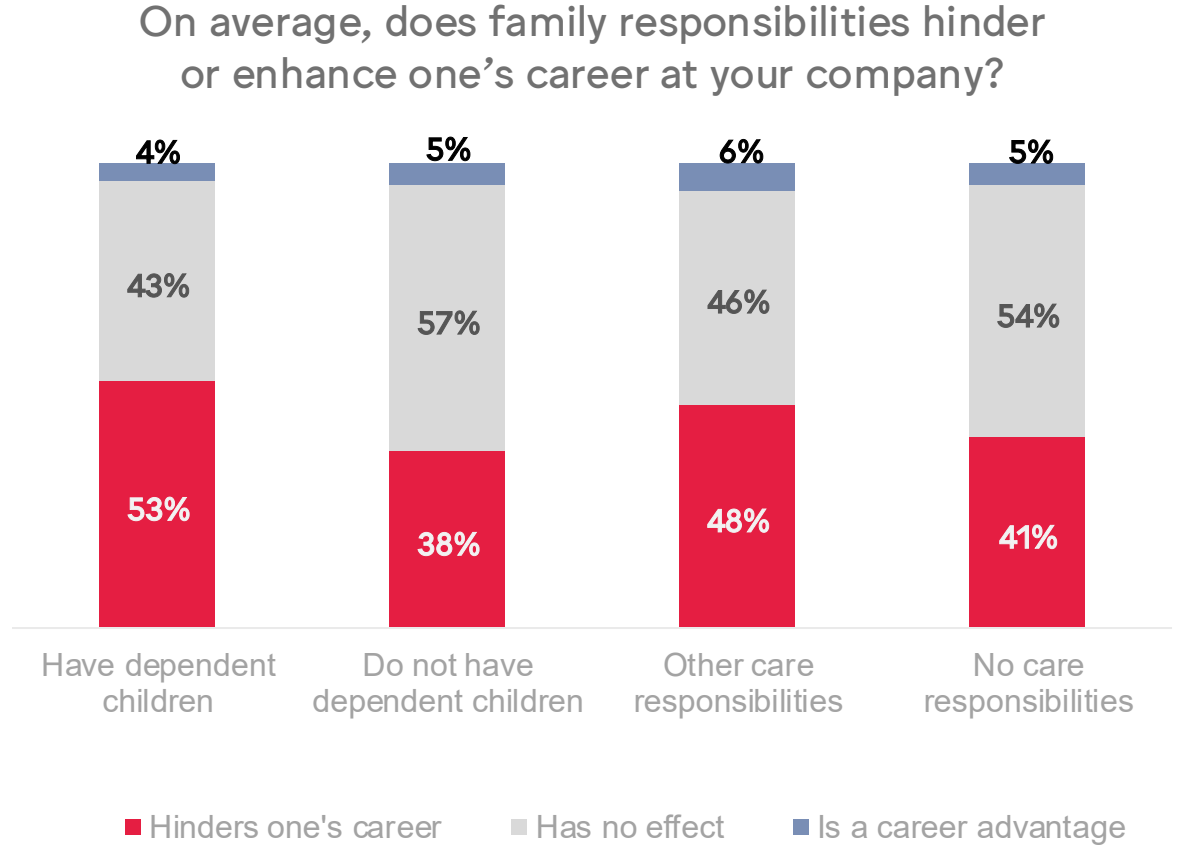
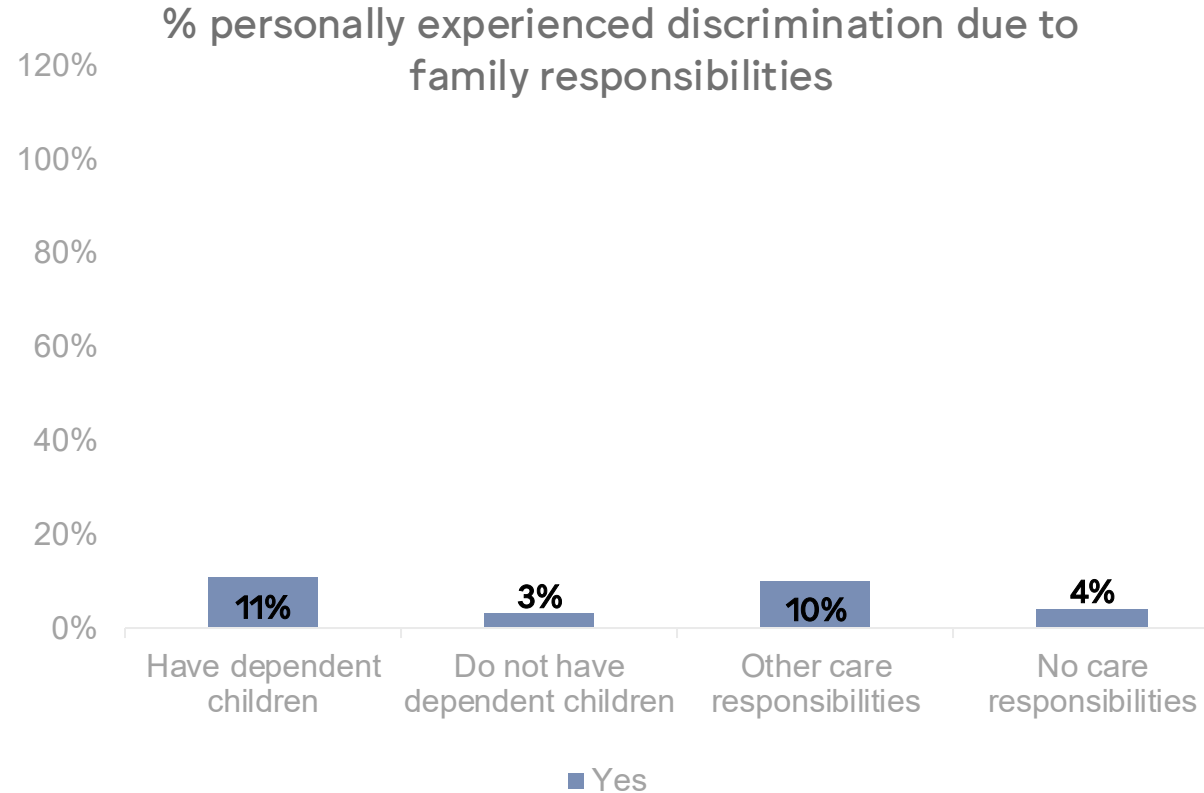
6%

Of female respondents have personally experienced discrimination due to their family responsibilities, compared to 5% of men.

46%

Of female respondents believe that family responsibilities can hinder one's career at their company, compared to 37% of men.

Perceptions of Family Responsibilities in Poland



4. Appendix



Index questions

Company sense of belonging:

How strongly do you agree or disagree with these statements?

1. Strongly disagree

2. Disagree

3. Neither agree or disagree

4. Agree

5. Strongly agree

99. Prefer not to answer

- I feel like I belong at my company.
- I am a valued and essential part of my direct team.
- I am a valued and essential part of my company.
- I am emotionally and socially supported at work.
- My unique attributes, characteristics, skills, experience and background are valued in my company.
- Employees in my company feel comfortable being themselves.
- Senior managers are fair when it comes to hiring or career advancements of those that report into them.
- I am provided with sufficient support to develop my skills and progress my career.

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

Yes/No

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

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

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

Poland and global data

| Wave 2 - 2023 - total | Poland | GLOBAL |
|---|------------|------------|
| Inclusion Index | 57% | 63% |
| Company Sense of Belonging Percent | 57% | 69% |
| I feel like I belong at my company - % agree | 65% | 74% |
| I am a valued and essential part of my direct team - % agree | 75% | 82% |
| I am a valued and essential part of my company - % agree | 59% | 71% |
| I am emotionally and socially supported at work - % agree | 56% | 64% |
| My unique attributes, characteristics, skills, experience and background are valued in my company - % agree | 37% | 70% |
| Employees in my company feel comfortable being themselves - % agree | 74% | 75% |
| Senior management do not discriminate when it comes to hiring or career advancements of those that report into them - % agree | 48% | 55% |
| I am provided with sufficient support to develop my skills and progress my career - % agree | 47% | 57% |
| Absense of Discrimination Percent | 96% | 96% |
| My Age - Personally Discriminated at Company - % no | 92% | 92% |
| My Gender - Personally Discriminated at Company - % no | 91% | 94% |
| My Family Status - Personally Discriminated at Company - % no | 94% | 95% |
| My Race - Personally Discriminated at Company - % no | 99% | 96% |
| Religion - Personally Discriminated at Company - % no | 98% | 99% |
| Disability Status - Personally Discriminated at Company - % no | 100% | 99% |
| Relationship status - Personally Discriminated at Company - % no | 99% | 99% |
| Appearance - Personally Discriminated at Company - % no | 96% | 96% |
| Social Class - Personally Discriminated at Company - % no | 98% | 97% |
| Presence of Negative Behavior Percent | 20% | 19% |
| Unfairly spoken over and not listened to in meetings - % yes | 26% | 27% |
| Learning Opportunities or progress restricted by senior colleagues - % yes | 12% | 17% |
| Undervalued compared to colleagues of equal competence - % yes | 31% | 28% |
| People taking sole credit for shared efforts - % yes | 33% | 32% |
| Bullied, undermined or harassed in any way - % yes | 14% | 13% |
| Physical harassment or violence - % yes | 1% | 1% |
| Exclusion from events/activities - % yes | 9% | 13% |
| Made to feel uncomfortable in the workplace - % yes | 33% | 22% |