World Federation of Advertisers

# DEI in Content Production

*survey results*

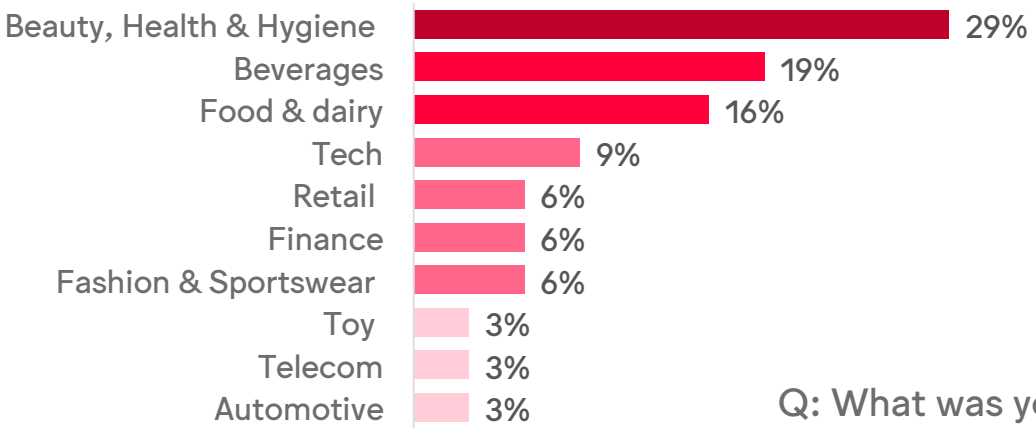
June 2024

# About this document

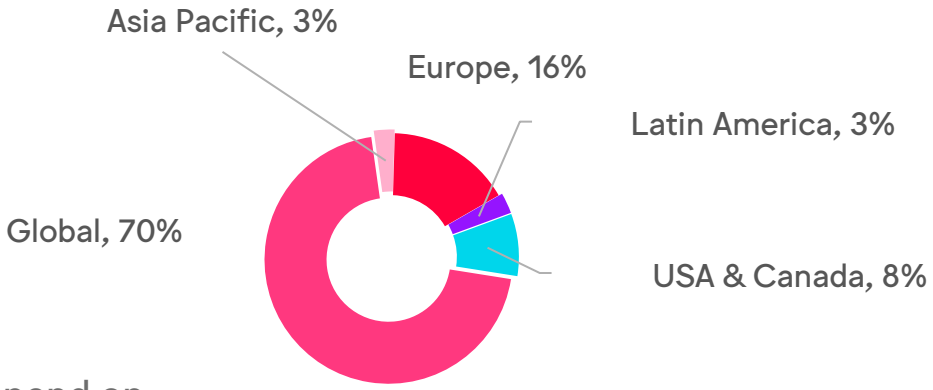
- Contains the results of an online survey conducted in Q1 & Q2 2024. This was a follow-up to a similar survey conducted in 2021.
- Respondents were **mainly in a marketing procurement role.**
- **38 respondents from 32 different companies took part,** representing **10 different industry sectors.**
- Results of this survey fed into WFA's guide, Unlocking Creativity: The Impact of DEI in Content Production (published June 2024).

# Respondent profiles

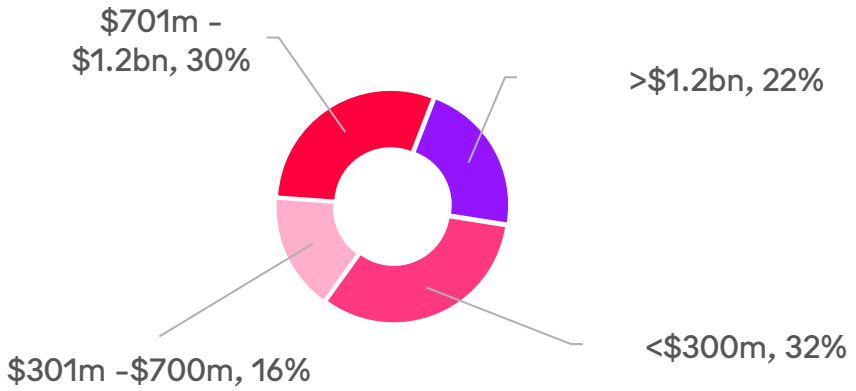
Respondents' industry sectors




Q: Which of the following geographies best describes your area of responsibility?

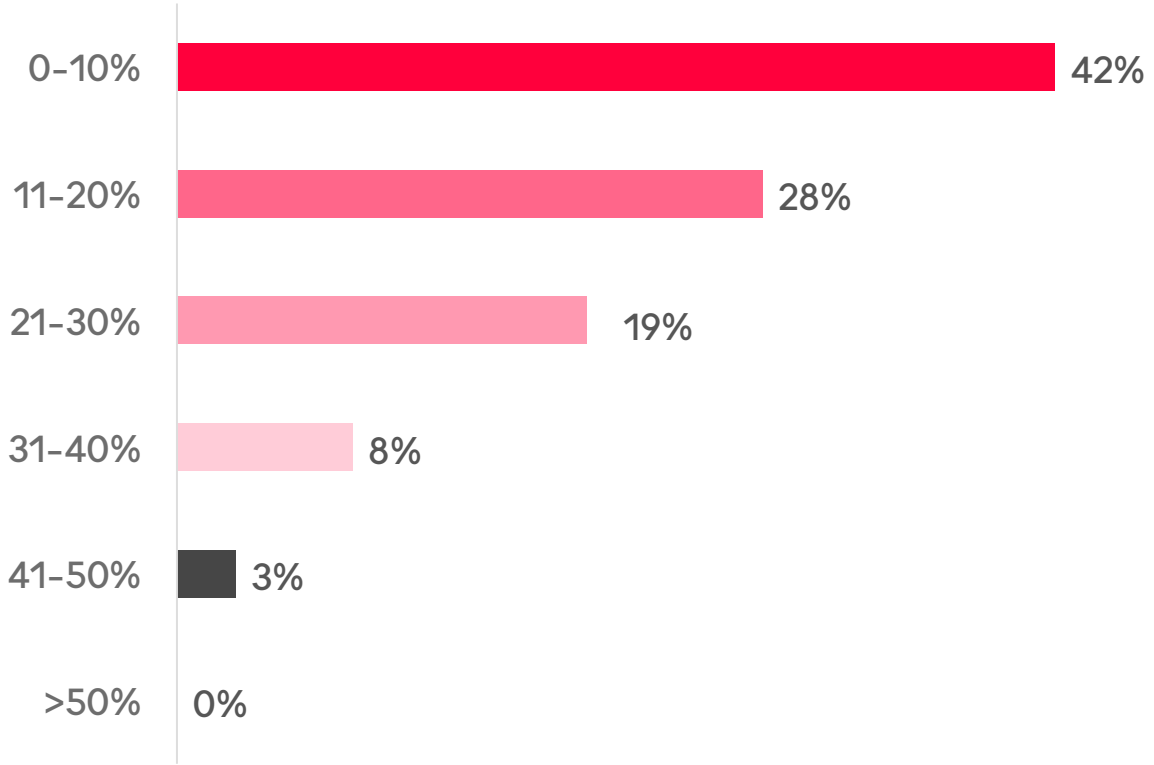



Q: What was your organisation's spend on marketing and media in last full financial year?



# 7 in 10 respondents spend up to 20% of their total marketing budget on content production.

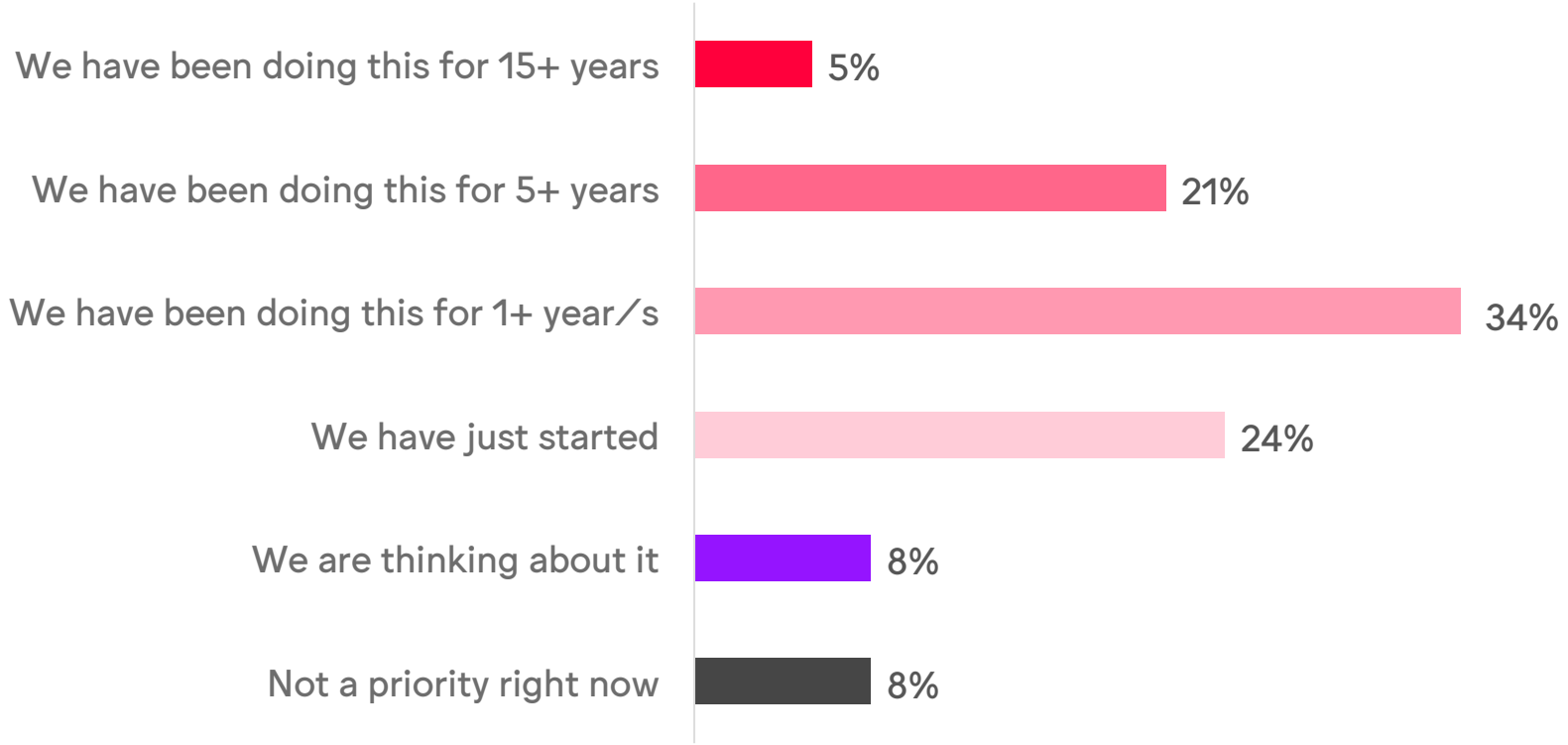
Q: What percentage of your total marketing budget is spent on the production of content? (doesn't include agency fees)




Source: WFA survey – DEI in Content Production; Base = 32 (companies); date = Q1-Q2 2024

# 1 in 3 have been looking into DEI in global production for between 1-5 years, while 1 in 4 have just started.

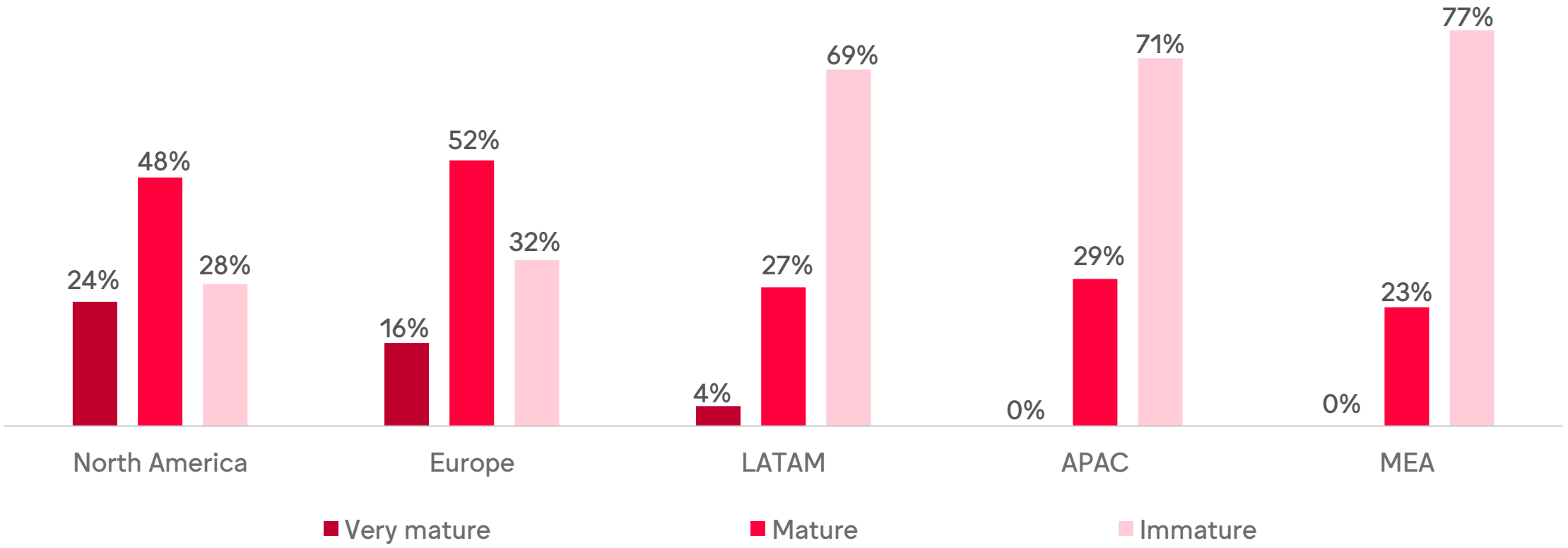
Q: Where are you on the DEI journey in global production in your organisation?




**Source: WFA survey – DEI in Content Production;** Base = 32 (companies); date = Q1-Q2 2024

# Maturity of DEI initiatives varies by region: 24% describe their efforts as very mature in North America. Just 4% say the same about LATAM.

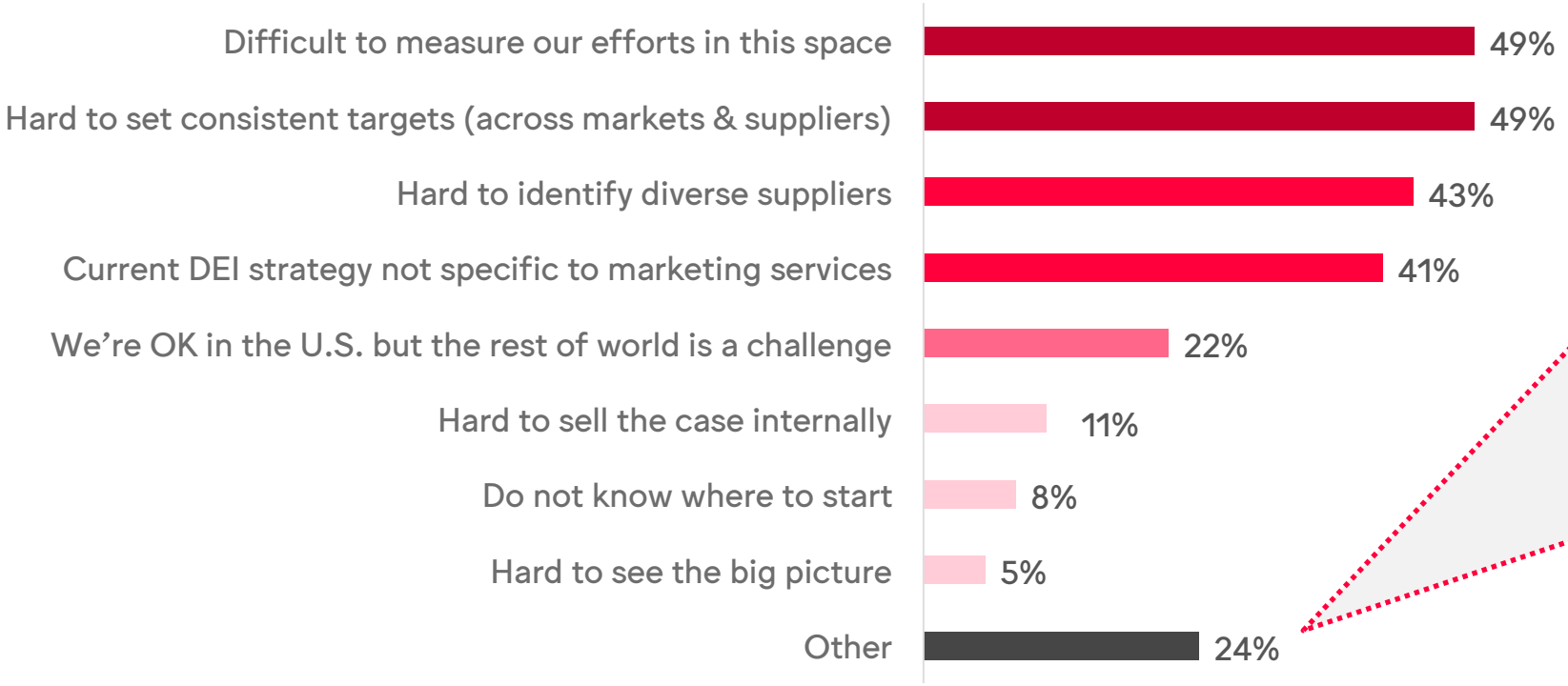
Q: How would you qualify the maturity of DEI initiatives in your organisation?




Source: WFA survey – DEI in Content Production; Base = 32 (companies); date = Q1-Q2 2024

# Measurement, setting targets & identifying diverse suppliers – key barriers to implementing DEI in production.

Q: What are the main barriers to driving DEI initiatives in global production in your organisation?




"Harmonising business outcomes with DEI KPIs."

"Local society constraints / belief of non-acceptance."

"Traditional entry barriers lowering through tech advances that make filming easier, but programmatic and systematic enabled is lagging behind in both agencies and production entities."

"Lack of focus from marketing teams and agencies."

"DEI is part of the evaluation criteria when pitching global productions. It can be tricky to strike the perfect balance when it comes to representation of our consumers and audiences."

"Lack of reporting to capture specific smaller production areas."

"Hard to gather the data from various sources."

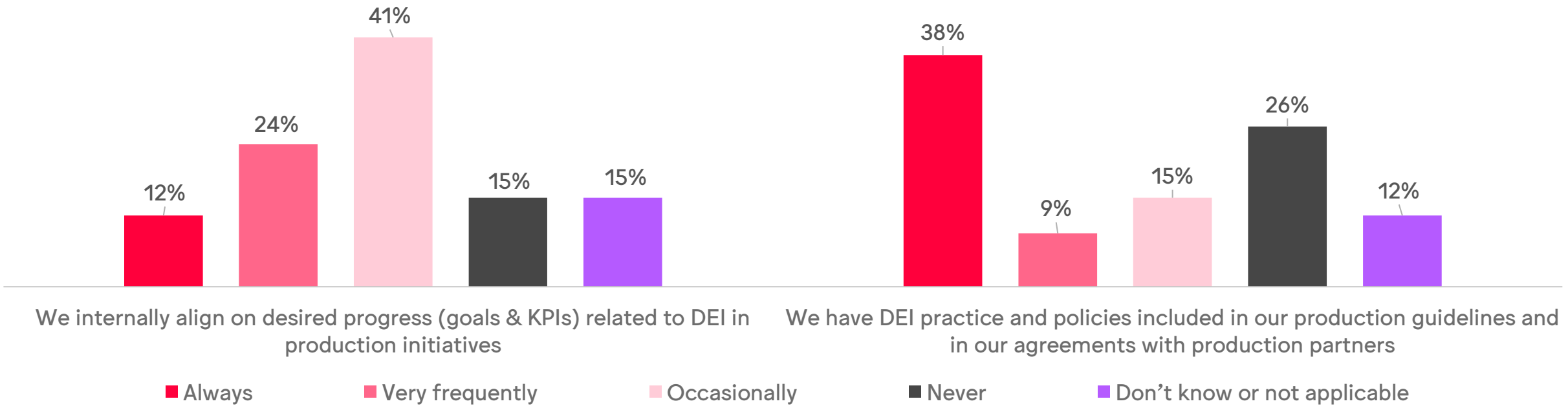
"Local legislation."

**Source: WFA survey – DEI in Content Production;** Base = 32 (companies); date = Q1-Q2 2024

## 36% always/very frequently align on DEI goals & KPIs in production, while 41% do so occasionally.

## 38% always have DEI practices & policies included in their production guidelines & partner agreements, while 26% say they don't.

Q: How often does your organisation do the following?




Source: WFA survey – DEI in Content Production; Base = 32 (companies); date = Q1-Q2 2024

# Companies use a variety of KPIs/metrics to track their progress on DEI in global production.

Q: What types of KPIs/metrics are often considered to track progress made in the DEI journey in global production by your organisation?

"We only report some production into AdGreen at the moment."

"Diverse partner spend, diverse representation."

"Presently, we track by certified vendor spend."

"We have a specific framework and a specific department which is leading our DEI journey - not specifically for production but for all areas of our operations in the same way."

"Geena Davis Institute reports are tracking progress for the past two years. 2024 report is year 3."

"Production/Tier-2 spend."

"We track staffing composition."

"Behind the camera, tracking the percentage of project allocation to female directors globally and per BU, per region, per agency partner. Also starting to track the business allocation for diverse/minority-owned business partners."

"We're starting to track DEI of crew members."

"KPIs are set by marketing."

"Spend tracking, RFx inclusion, new business awarded, development + coaching."

"We use Talent Trust to track D&I."

"We track behind the camera and casting."

"We will start tracking DE&I and Sustainability in our Media Content. Other internal measures apply for staffing and such."

"We track advertising representation."

"We use the Unstereotype Metric via Unstereotype Alliance (MetrixLab)."

"We track via internal reporting systems and require reports from vendor partners."

"Considering the Procurement environment, we have the goal to leverage our diverse suppliers as a KPI, meaning suppliers that have in their board minority representatives."

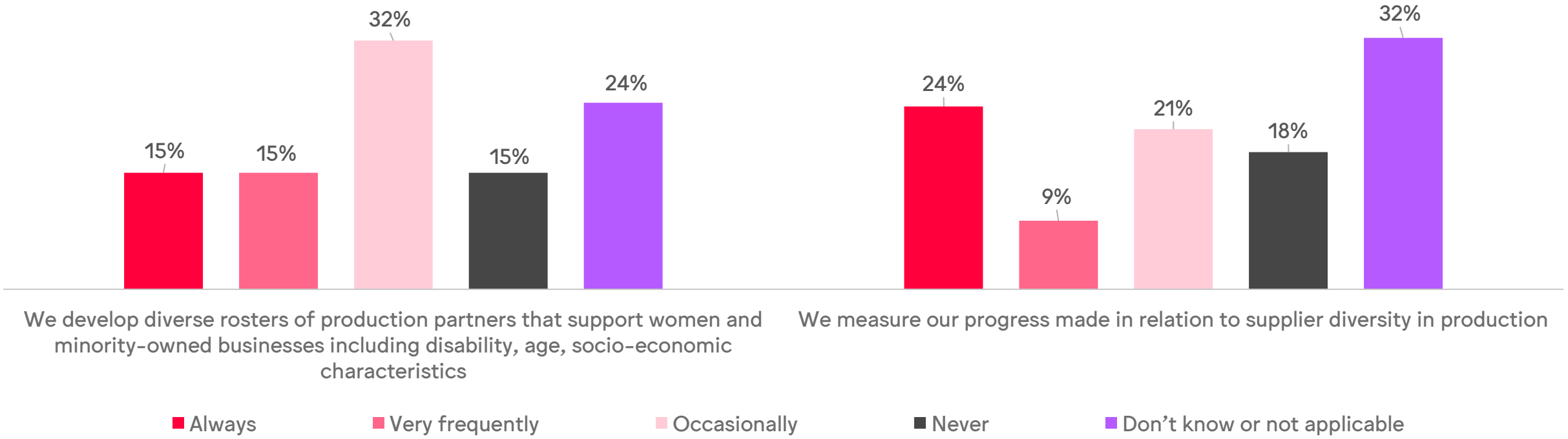
"We have a DEI content production policy. Our creative agency is incentivised to implement it on all the productions they are managing."

**Source: WFA survey – DEI in Content Production**; Base = 32 (companies); date = Q1-Q2 2024

# 30% always/very frequently develop diverse rosters of production partners, while 32% do so occasionally.

# 24% always measure progress in relation to supplier diversity in production, while 18% say they don't.

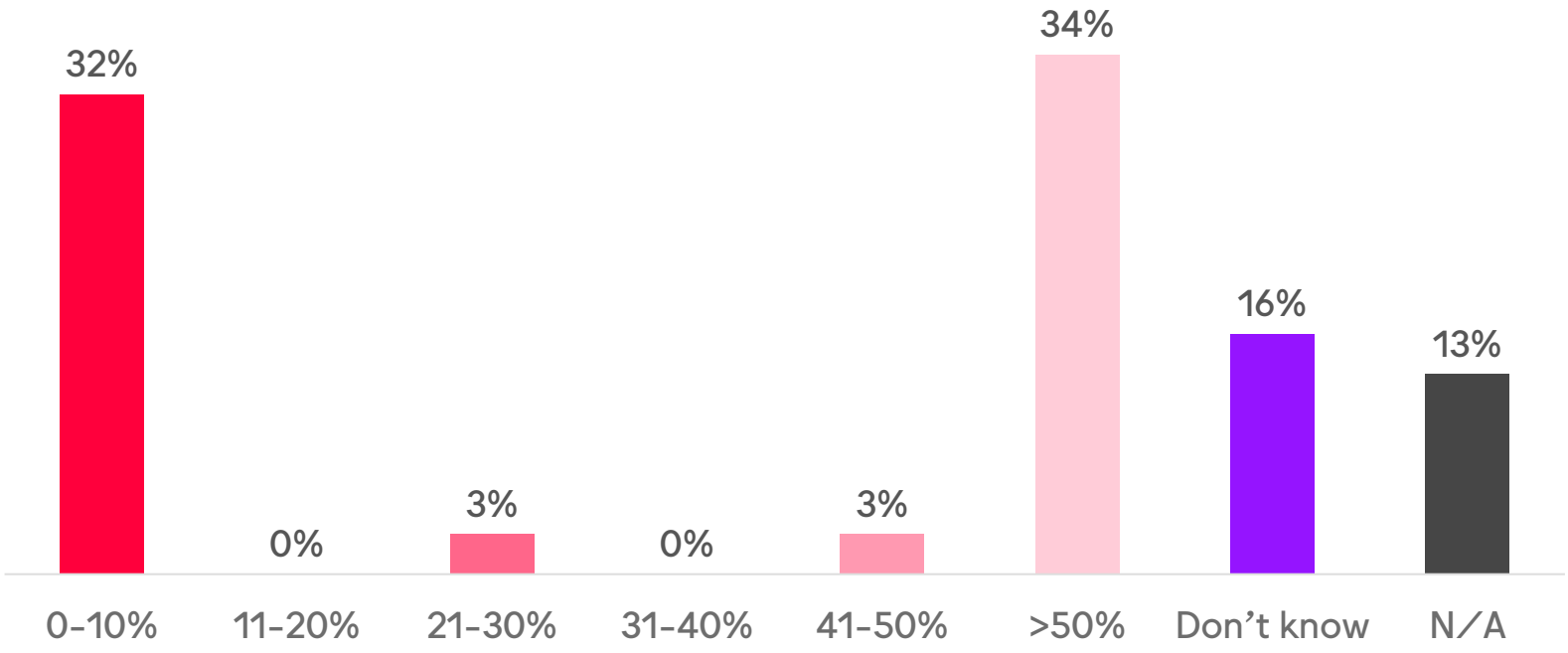
Q: How often does your organisation do the following?




Source: WFA survey – DEI in Content Production; Base = 32 (companies); date = Q1-Q2 2024

# 1 in 3 leverage a triple bid or similar process for 50%+ of their productions. Another third do so for <10% of productions.

Q: What percentage of your productions leverage a triple bid or similar process to invite minoritised directors to bid on productions?




**Comments:**

"Most bids include female directors, but diversity is often limited to that."

"The work that comes through Indirect Procurement is triple bid. But it is not mandatory for brands to utilise IP and they often don't go through a bidding process."

"Triple bidding is in place; however, no specific reach out to minoritised directors to bid."

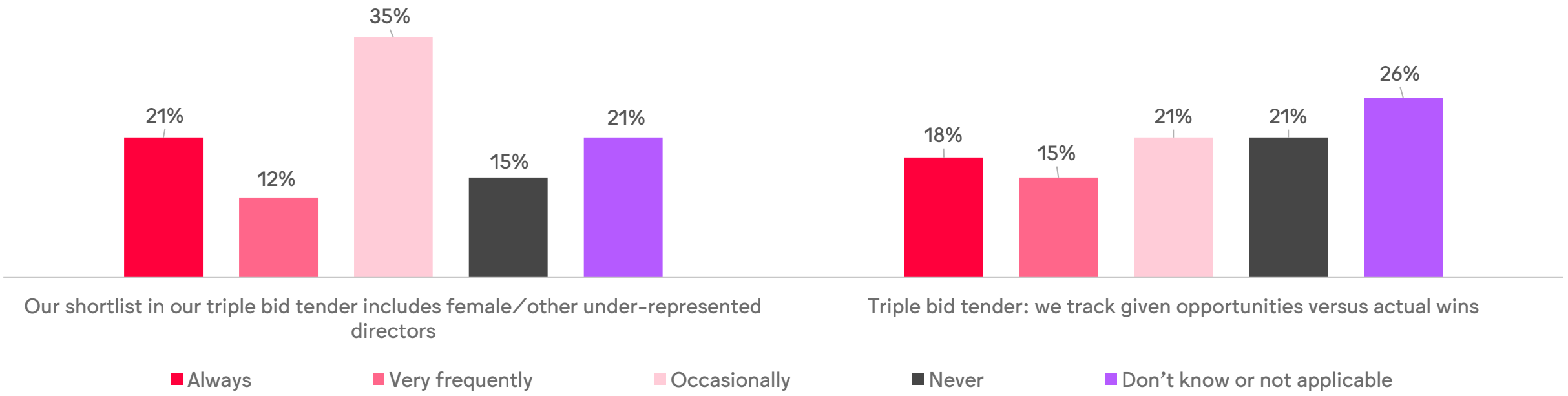
"We don't typically do triple bidding in production."

**Source: WFA survey – DEI in Content Production;** Base = 32 (companies); date = Q1-Q2 2024

# 1 in 3 always/very frequently include female/underrepresented directors in their triple bid shortlist; 35% do so occasionally.

# 18% always track given opportunities vs actual wins in their triple bids.

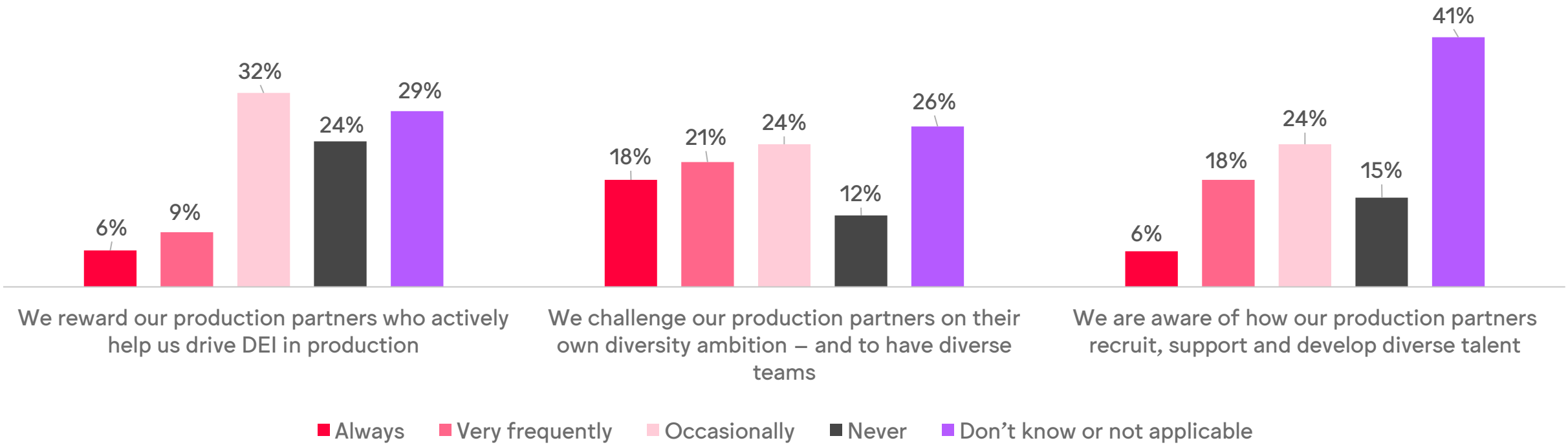
Q: How often does your organisation do the following?




**Source: WFA survey – DEI in Content Production;** Base = 32 (companies); date = Q1-Q2 2024

# Nearly 40% always/very frequently challenge their partners to have diverse teams. But only 6% say they are always aware of how their partners recruit, support and develop diverse talent.

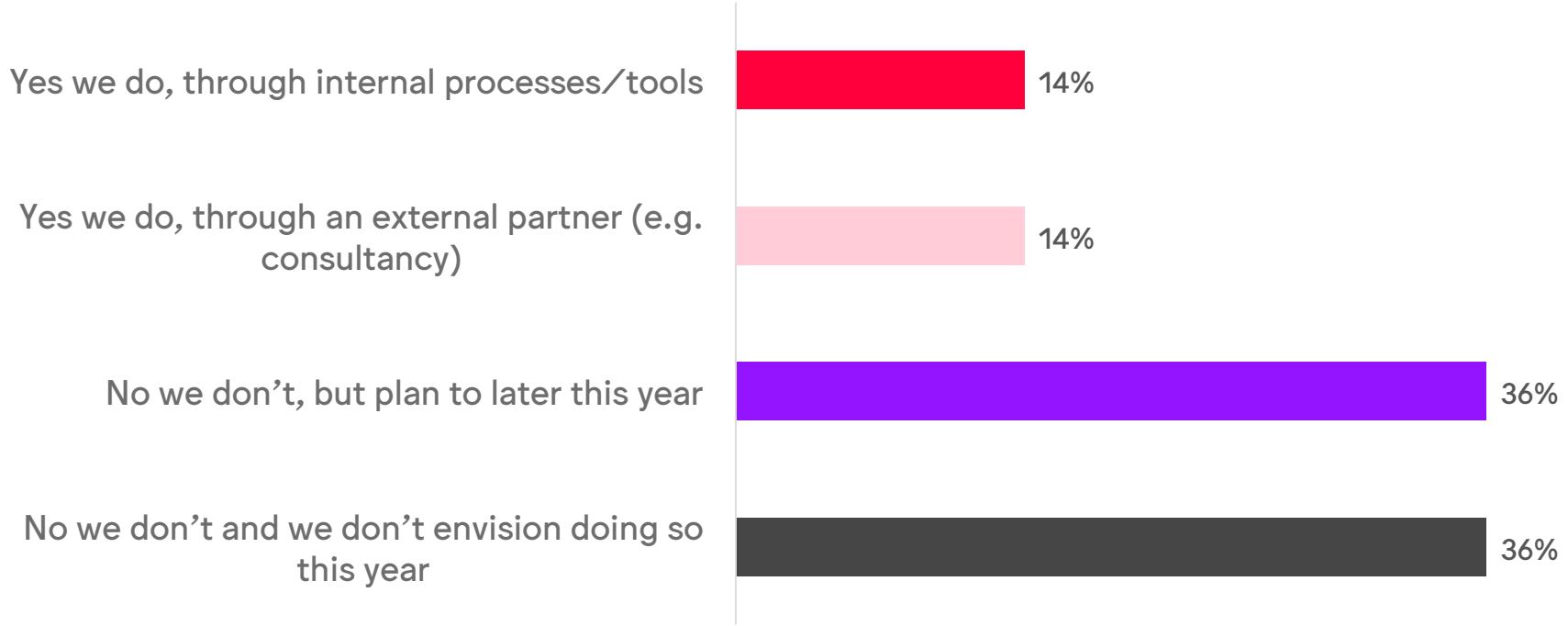
Q: How often does your organisation do the following?




**Source: WFA survey – DEI in Content Production;** Base = 32 (companies); date = Q1-Q2 2024

# 3 in 10 respondents already track the representation of talent and crew, while another 36% are due to start later this year.

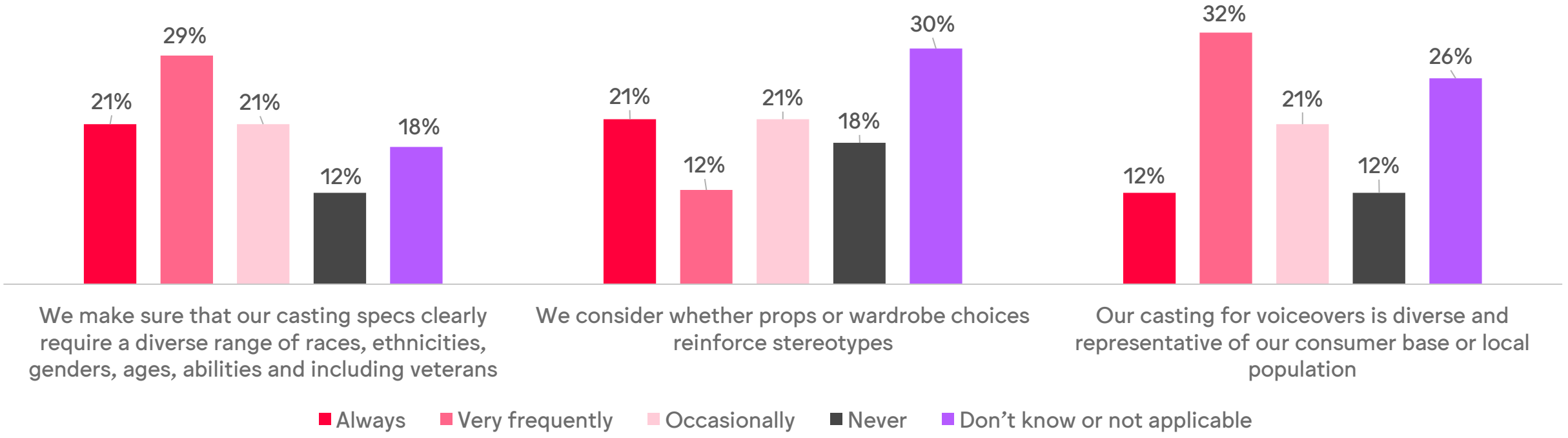
Q: Do you track the representation of talent and crew in production?




Source: WFA survey – DEI in Content Production; Base = 32 (companies); date = Q1-Q2 2024

# Half of respondents always/very frequently make sure their casting specs clearly require a diverse range of talent.

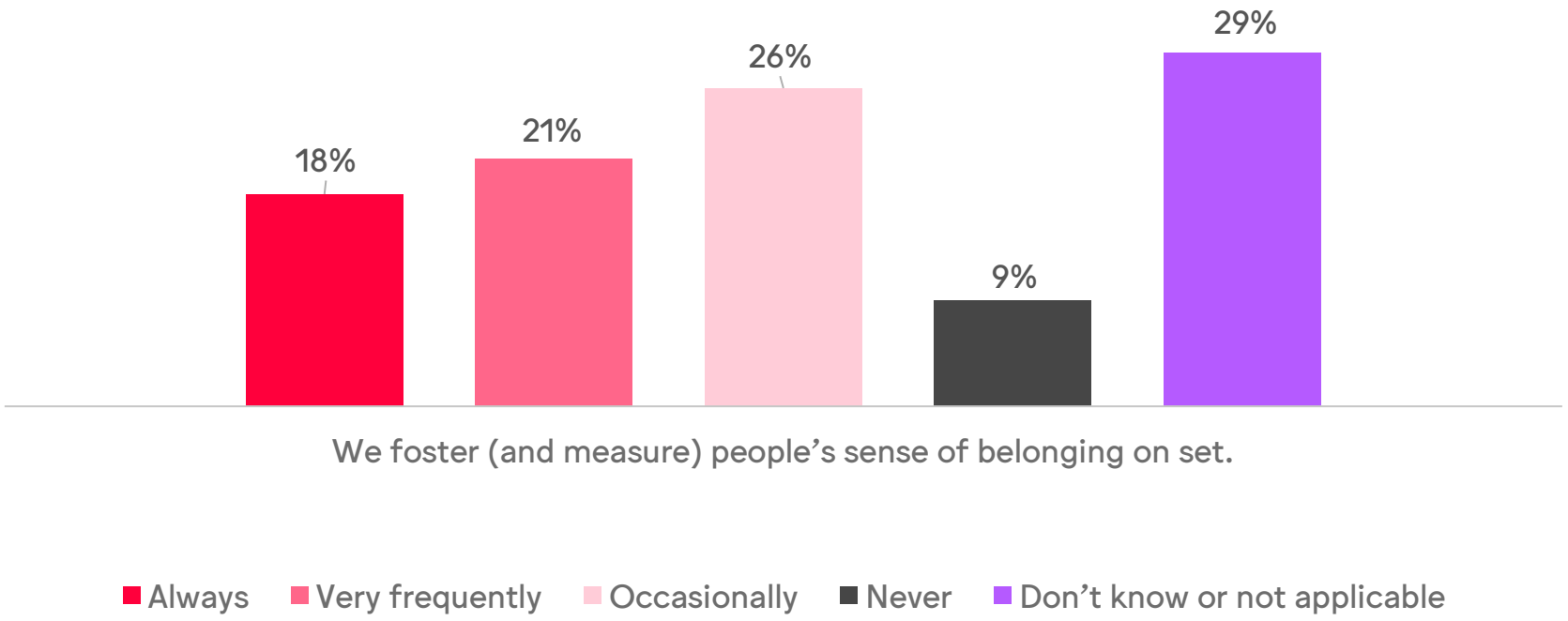
Q: How often does your organisation do the following?




**Source: WFA survey – DEI in Content Production;** Base = 32 (companies); date = Q1-Q2 2024

# 39% always/very frequently foster and measure people's sense of belonging on set; 26% do so occasionally.

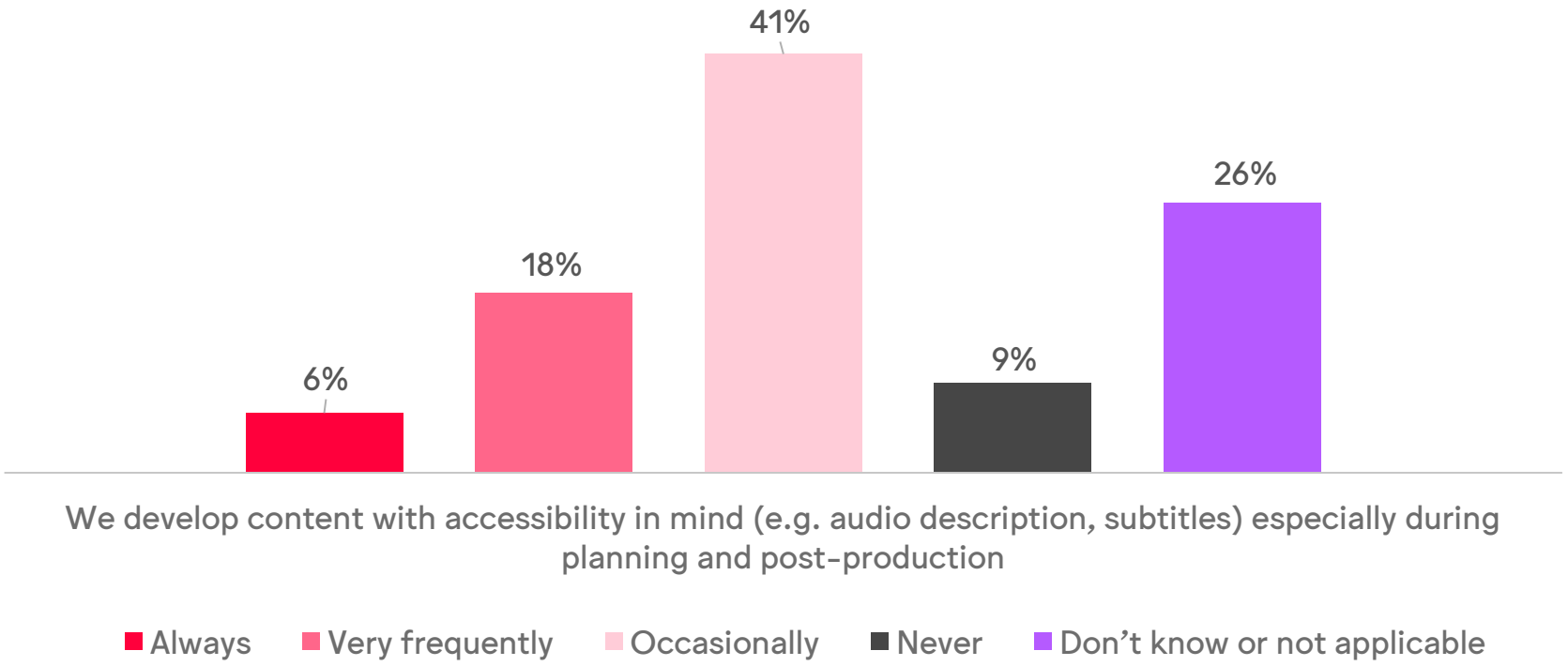
Q: How often does your organisation do the following?




Source: WFA survey – DEI in Content Production; Base = 32 (companies); date = Q1-Q2 2024

# Only 6% always develop content with accessibility in mind, while 41% do so occasionally.

Q: How often does your organisation do the following?




Source: WFA Benchmark – DEI in Content Production; Base = 32 (companies); date = May 2024

# Many companies don't have production guidelines or tracking in place (yet) specific to content accessibility, but several have closed captioning *by default.*

Q: What guidelines do you have in place in terms of production of accessible content? Do you track these/have metrics in place?

"Closed captioning is the most common."

"Enable closed captioning on platforms. Best practices – design for sound-off experience."

"We have clear processes within our global production guidelines regarding accessibility."

"It's part of our guidelines for social and digital."

"We are rolling out the accessible content by category and country."

"Television is strong. For accessible advertising, we are starting the journey and identifying partners."

"Guidelines are currently in development."

"There are no specific guidelines in place for this."

"We track and report quarterly. In the markets where ad capability is established, we ensure to take action based on the creativity limitations. Closed captioning is by default a must."

"100% of projects to be bid with at least one certified diverse company."

"We have guidelines in place. Don't know if we track them."

"We don't have any KPIs or metrics to evaluate production services in this matter. We still need to build."

"No tracking in place."

"I'm not actually aware of any metrics in place."

"We don't track anything. It's procurement pushing for it."

Source: **WFA survey – DEI in Content Production**; Base = 32 (companies); date = Q1-Q2 2024

# AI is looked at for storyboards, closed captioning, asset localisation, and post-production, among others. But most are in exploratory phase and cautious about the risks.

Q: Are there parts of your content planning or production process where artificial intelligence (AI) may have played a role?

"Not for consumer-facing activities. There's AI being used for storyboarding, mood boards, test voiceovers, etc."

"We are piloting automation with asset localisation."

"AI is currently being utilised in still image post-production and plays a supporting role in copy creation for products and translations."

"We have been using AI to optimise media placement for the last 5-6 years. We use AI to communicate creative ideas/visualise set design internally amongst partners, as well as to improve audio (pull out background audio)."

"AI is being utilised today for translations and some stock photography, primarily internal usage. All else is still exploratory for now."

"We have started to explore AI for closed captioning and transcription."

"Some partial internal areas have started to get supported by AI (less complicated areas). Suppliers also started using it partially in post-production (animation) or pre-production (storyboard creation)."

"We are exploring bottom of funnel content generation through AI (no human representation)."

"Minimal to date - but looking into leveraging AI more in 2024."

"We are wrapping the legal framework before getting to the extensive use of AI."

"Not yet, we are first working on a responsible Marketing AI policy to make sure we are doing the right thing for our society and honour talents' IP the right way."

"We are definitely putting efforts and resources into investigating how to incorporate AI. We are at the same time cautious about ethics, quality and potential plagiarism/infringement of IP rights."

"Not in a broad practice, we have certain regulations within company when it comes to use of AI. There are several pilots we are running."

"In discovery and experimentation phase. Very early stages."

"None at the moment, but we are looking into this as we speak."

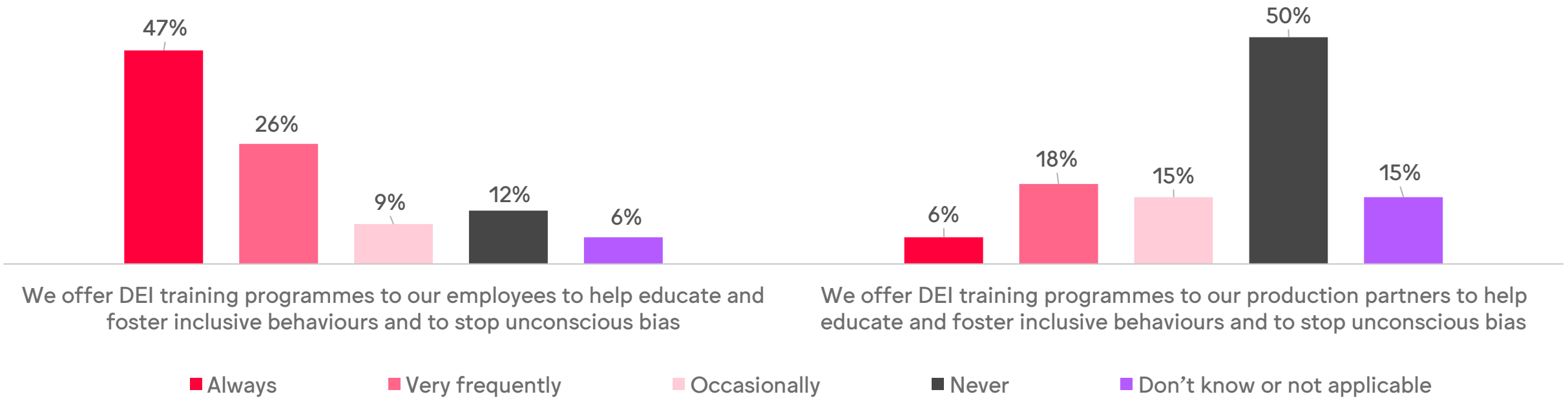
"Not yet, we're testing it out."

"We are too scared to kick it off."

**Source: WFA survey – DEI in Content Production**; Base = 32 (companies); date = Q1-Q2 2024

# Nearly half (47%) always offer DEI training programmes to their employees. But only 6% always offer similar programmes to production partners.

Q: How often does your organisation do the following?

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**Competition compliance policy**

The purpose of the WFA is to represent the interests of advertisers and to act as a forum for legitimate contacts between members of the advertising industry. It is obviously the policy of the WFA that it will not be used by any company to further any anti-competitive or collusive conduct, or to engage in other activities that could violate any antitrust or competition law, regulation, rule or directives of any country or otherwise impair full and fair competition. The WFA carries out regular checks to make sure that this policy is being strictly adhered to.

As a condition of membership, members of the WFA acknowledge that their membership of the WFA is subject to the competition law rules and they agree to comply fully with those laws. Members agree that they will not use the WFA, directly or indirectly, (a) to reach or attempt to reach agreements or understandings with one or more of their competitors, (b) to obtain or attempt to obtain, or exchange or attempt to exchange, confidential or proprietary information regarding any other company other than in the context of a bona fide business or (c) to further any anti-competitive or collusive conduct, or to engage in other activities that could violate any antitrust or competition law, regulation, rule or directives of any country or otherwise.

Please note that the recommendations included in this document are merely meant as suggestions or proposals. They are not binding in any way whatsoever and members are free to depart from them.