



SRI gender diversity report:

Turning Ambition Into Action



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Foreword

I have had the great fortune to be working the sports, media and entertainment industries for the past eight years. In that time, I have seen significant change as organisations have become increasingly sophisticated and the workforce has become better qualified, more diverse and more professional.

However, there is much still to do. The senior levels of organisations continue to lack diversity and the career paths and progression for talented executives moving through the ranks remains hard to navigate. One of the significant shifts in recent months has been the increasingly consistent feedback we receive from senior executives across a range of organisations that we work with, is that this lack of diversity is harming their organisations. There is a growing consensus for change.

In order to help to provide a greater in-depth understanding of the current state of play in the industries we cover, we were keen to provide further insight, data and intelligence through the creation of our own gender diversity report. Our focus in this report was to provide a global picture across media, sport & entertainment, assess regional differences and approaches and, above all, to translate ambition into some definitive actions which can help to accelerate the transformation of the industries we serve. I do hope that you find the report both interesting and informative.



A handwritten signature in black ink, appearing to read 'Jim Chaplin'.

Jim Chaplin
CEO SRi

Executive Summary

As the volume increases in support of initiatives such as mandatory percentages of women occupying board positions, and the links between better balances of the sexes and business success solidify further, we sought to check in with our clients, candidates, colleagues and friends all around the world to see what strides are being made in their regions – if any.

The global picture

The global picture is encouraging in part. We found that 85 per cent of respondents to our survey agreed that gender diversity is important for the success of an organisation. That figure is up 13 points on a similar study done in 2010.

Yet there are serious disconnects between what nearly all respondents agree is important and what is actually happening in practice inside organisations all over the world.

Just half of the respondents said their organisation was committed to achieving gender diversity in the work place, with nearly a third unsure, and a full 20 percent saying their organisation wasn't very committed or wasn't committed at all.

Equally troubling is more than 60 per cent of respondents reported that their organisations have not been successful in getting more women into executive or leadership roles.

When asked if overall gender diversity in their organisation in the past two years had improved, stayed the same or become worse, only 38 per cent noted signs of improvement. There is a serious disconnect between awareness and action.

Results by gender

Overall, men think gender diversity is important for the success of an organisation (83 per cent), believe their firm is committed to achieving gender balance (68 per cent), think they have been successful in getting more women into executive or leadership roles (47 per cent) and think overall gender balance has improved (47 per cent).

Women, on the other hand, see things much differently. Overall, women believe gender diversity is extremely important for the success of an organisation (91 per cent), yet just 36 per cent believe their organisation is committed to achieving gender diversity in the work place.

Executive Summary

Similarly, less than one-third of women (30 per cent) believe their organisation has been successful in achieving gender diversity in executive or leadership roles.

Perhaps the most important finding from our research is that 72 per cent of women reported that overall gender diversity had not improved in their organisation in the past two years. There is certainly ambition, but very little action.

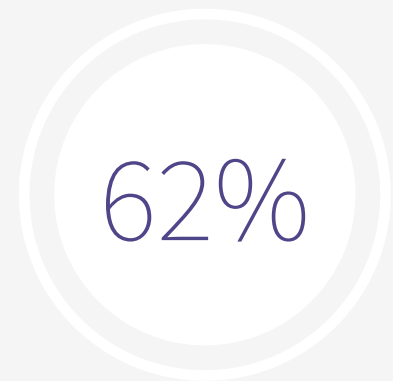
Results by region

The picture by region is just as fascinatingly varied, with North American and China leading the way, and perhaps surprisingly, Continental Europe lagging behind.

Less than quarter of European respondents said their organisations had been successful in improving gender diversity in executive or leadership roles, compared to 63 per cent of respondents from North America and nearly half of respondents from China. The report that follows details the regional picture in our key markets.

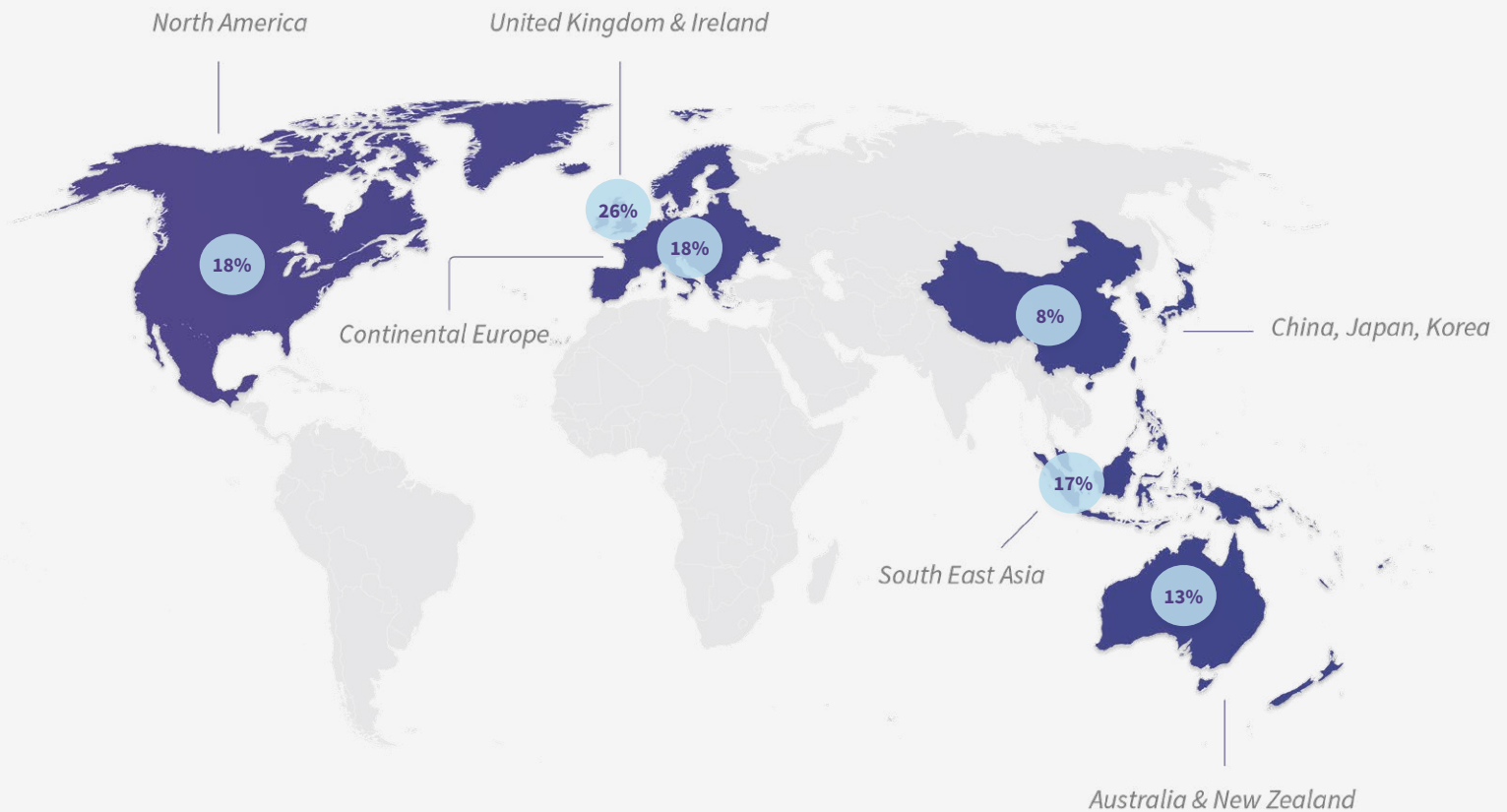
What is clear is that all regions, age groups, and genders are aware and agree that gender diversity is important for the success of an organisation.

What is also clear is that *much more action is needed.*



of global respondents felt there's been **no improvement** to gender diversity in the past two years

Profile of Participants



Age Range

- 34%** 30-40
- 29%** 40-50
- 23%** 60+
- 14%** Under 30

Genders

- 51%** Male
- 48%** Female
- 1%** Non Gender Conforming

Questions and Global Answers

You identify as

- 51% Male
- 48% Female
- 1% Gender Non-Conforming/Other

Age

- 14% <30
- 29% 40-50
- 34% 30-40
- 23% 60+

Location

- 13% Australia & New Zealand
- 8% China, Japan, Korea
- 18% Continental Europe
- 18% North America
- 17% South East Asia
- 26% United Kingdom & Ireland

Gender diversity is important for the success of an organization

- 3% Strongly Disagree
- 1% Disagree
- 10% Neither Agree nor Disagree
- 23% Agree
- 63% Strongly Agree

How committed is your organization to achieving gender diversity in the workplace?

- 26% Not committed at all
- 10% Not very committed
- 30% Neither committed not uncommitted
- 25% Somewhat committed
- 26% Very committed

Questions and Global Answers

My organization has been **successful** in achieving diversity in executive or leadership roles

- 17% Strongly Disagree
- 18% Disagree
- 27% Neither Agree nor Disagree
- 19% Agree
- 19% Strongly Agree

My organization has been **successful** in achieving gender diversity in entry-level or middle-management roles

- 7% Strongly Disagree
- 12% Disagree
- 28% Neither Agree nor Disagree
- 28% Agree
- 25% Strongly Agree

The person or group most responsible for driving gender diversity initiatives in my organization is

- 34% Board of Directors/Management Board
- 32% Chief Executive Officer
- 21% Human Resources
- 13% Other

In the past two years overall gender diversity in my organization has

- 38% Improved
- 55% Stayed the same
- 7% Become worse

If there's one thing that could be done to **improve** gender diversity in the workplace, what would you wish for it to be?

Selected answers included on regional pages



Australia & New Zealand

The issue of gender balance has been in the Australia's and New Zealand's spotlight for the past few years, especially in Australia after the release of its federal government's Workplace Gender Equality Agency annual scorecard in November 2017.

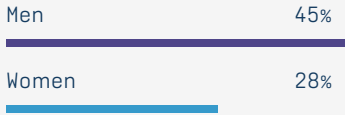
The scorecard revealed that gender equality has not improved much from 2016 to 2017. The responses to this survey illustrate the general disparate attitude and perception between men and women on gender diversity in the workplace in the region.

While all female respondents and most male respondents agreed that gender diversity is important for the success of an organisation, around 70% of the female respondents seemed to feel that their organisation has stayed the same or worsened in this area in the past two years; the latter was divided almost evenly between feeling that there has been improvement and that it has stayed the same in the past two years.

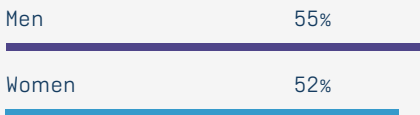
When asked about how committed their organisation is in improving gender diversity, about half of respondents from the region responded in the positive. But more than two thirds indicated that their organisation has been unsuccessful in placing more women in leadership or executive roles. This observation is confirmed by Chief Executive Women (CEW), an organisation that represents hundreds of Australia's most senior women leaders. In September 2017, their research discovered that almost a quarter of the country's top 200 listed companies has no women in their senior executive leadership team.

Overall gender diversity at your organisation in the past two years has...

'Improved'



'Stayed the same'



'Become worse'



32%

said their organisations had been **successful** in getting more women into leadership or executive roles

48% said their organisations were committed to improving gender balance

48%

SRi Insight

The ANZ results of our survey may make difficult reading for some, but it shouldn't be too surprising. Not a day passes that we aren't having a conversation about gender diversity with clients and it's clear to us the change is indeed happening.

With examples such as the WBBL, AFLW, the Matilda's, Suncorp Super Netball & the bid for the 2023 WWC, it is fair to say that Australia is truly world leading in the development of Women's content. The ANZ sport landscape is certainly shifting, with women's sport benefitting from much higher profile than in years past.

However, this diversity – while improved - is not yet reflected in the make-up of the boards across major

If there's one thing that could be done to improve gender diversity in the workplace, what would you wish for it to be?

Men say...



“Don't promote sexism by the illusion of diversity”

“Seeing reverse gender discrimination which is lowering the standards of business development”

Women say...

“Judge by people's skills and experience not their gender”

“Give the same opportunities to men and women, based on their skills and experiences not their gender”



sports or in the executive leadership of major sporting bodies.

The industry must continue to work towards increased diversity. We're delighted to be playing our small part in the above change by working with our clients to put forward transformational female talent for some of the biggest roles in sport. We will continue to encourage our clients to strongly consider all the fantastic female talent we put forward to them. Women's sport in Australia is in great health. This is not an overnight revolution, but something that the industry worked hard to achieve over many years, and this work needs to continue if equal representation in Sports governance is to be achieved.



China, Japan, and Korea

Responses collated from China, Japan and Korea were polarised – respondents either felt that their organisation was enthusiastically and successfully advocating for gender diversity or felt that there had been little to no change.

In Japan and Korea, those aged between 30-40 years old felt the most positive about gender diversity changes in their organisation while those above 50 years old remained neutral or sceptical. Similarly, levelling the playing field meant providing equal employment opportunities for the former while for the latter it seemed to be mandatory national or corporate policies to regulate gender proportions. Japan at 114th and Korea at 118th ranked amongst the lowest in the world in terms of gender equality according to the Global Gender Gap Report 2017 released by the World Economic Forum.

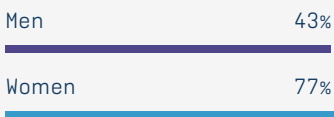
In China (ranked 99th), the responses were overall favourable, with many between the ages of 30-50 expressing high levels of affirmation of ongoing diversity efforts. China's economy is at once a hotbed for start-ups and multi-national companies (MNCs), and fertile ground for resolutely traditional state-owned enterprises. At risk of falling into stereotypes, there is truth in that start-ups, being small and more flexible in its operations, provide a more ideal environment for gender diversity to flourish. Europe, being the global leader in closing the gender gap, tend to retain its favourable policies in their MNCs as they expand overseas as well. So perhaps one could speculate that China's starkly contrasted responses reflect this melange of starkly contrasting organisational culture.

Overall gender diversity at your organisation in the past two years has...

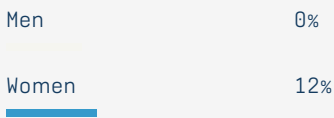
'Improved'



'Stayed the same'



'Become worse'



68%

said their organisation had been **successful** in getting more women into leadership or executive roles

60% said their organisations were committed to achieving gender diversity

60%

SRI Insight

Our Japan & Korea responses may not reflect what is happening in those markets. In Japan, it is well documented that the % of workers who are female is incredibly low and government attempts to improve this have been unsuccessful. In a culture bound by respect, it may be that results are skewed, due to respondents wanting to respond in a more 'positive or 'hopeful' way. In our experience, gender diversity' is not discussed as a topic in China. Not because its taboo but more that Chinese women in particular tend to have a 'just do it' attitude. In an environment of significant and

If there's one thing that could be done to improve gender diversity in the workplace, what would you wish for it to be?

Men say...

“Management training for female staff members”

“Give more opportunities to women at executive level”

Women say...

“More female working mothers in senior/top executive positions”

“Actively support women's career development and growth”

“Mandatory rule that 30% of management on all levels be non-male”

rapid change, women are willing to go with the flow and take opportunities that come.

There are many high profile women across a variety of large companies and exciting start ups and this in doubt has an effect on the aspirations of young Chinese women. The challenge will be to get to the next level – and if this requires regulatory change and positive policies – the government will have to lead the way. Unfortunately, this is where we see a woeful representation of women at present.



South East Asia

*Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar,
Singapore, Thailand, The Philippines, Timor Leste, Vietnam*

With each market comes its unique set of challenges and norms and the South East Asia region in particular comprises a medley of markets that are strikingly different from one another.

Our general findings suggested that while gender diversity was perceived to be important in this region and organisations propagated this, many still seemed to feel that these efforts were not bearing fruit; 59% indicated that gender mix in their organisation has remained unchanged in the past two years.

As with Central Europe, respondents felt strongly the prevalence of the conventional “white all-male club”, a damper that got increasingly difficult to overcome as one progressed through the ranks.

What we found interesting was that the Human Resource (HR) department had a greater perceived influence on gender diversity in the workplace – 30% felt that HR was key to developing and implementing appropriate policies. Such policies extended to hiring based on merit, ensuring equal pay and fostering a work-life friendly environment with flexible working hours and education on unconscious biasness. There was also less emphasis on creating women-specific policies than to ensuring fair consideration for all vacancies, never mind the gender. Several countries in South East Asia are seeing more female than male graduates each year, so perhaps this means that women were confident enough to wish to be considered based on their abilities, and not because it was an organisational or national obligation.

Overall gender diversity at your organisation in the past two years has...

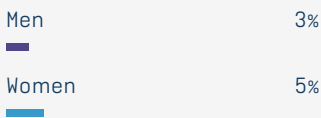
'Improved'



'Stayed the same'



'Become worse'



40%

said their organisations had been **successful** in getting more women into leadership or executive roles

said their organisations were committed to improving gender balance

53%

SRI Insight

Across business in general, SEA shows a good representation of women in the workforce, although this is not the case in the sports, media, entertainment and digitally focused sectors. Unlike "in the west" where these sectors often attract top graduates every year, they do not seem to be as appealing to graduates and start their career after being hand-picked by an MNC or government organisation. The region is so varied in its corporate sophistication that the workplace environment

If there's one thing that could be done to improve gender diversity in the workplace, what would you wish for it to be?

Men say...



"Having successful women role models - but not so much for women to follow but to enable men to see the advantages that women can bring - and that the men don't need to be threatened by."

Women say...

"Greater flexible working hours for women in middle management."

"Getting male colleagues to talk about it without feeling uncomfortable or defensive."



depends heavily on individual organisational culture. In Singapore, fortunately, many families benefit from affordable childcare in the form of full-time help and abundance of day care centres. This aids many to reduce the length of their career break and (re)focus intensely on career advancement. We could see concerns in the response that HR has the greatest perceived influence. True diversity will only be realised when we all take responsibility and of course action.



Continental Europe

In the World Economic Forum's Global Gender Gap Report 2017, Europe scored the best in achieving the lowest gender parity by region at 25%, cementing its position as the most progressive region in the world when it comes to gender diversity in the workplace.

However, our findings suggest that efforts to close the gender gap may be slowing down. Despite affirming the importance of gender diversity, 80% of respondents felt that it has "stayed the same" or "become worse" in the past two years.

In another concerning sign, just 30% of respondents to our survey from Continental Europe felt that their organisations are truly committed to achieving gender balance in the workplace. Going further, less than a quarter of this cohort said their firms had been successful in getting more women into executive or leadership positions. By way of comparison, that same figure is 63% in North America.

All of that begs the question: Can Europe still be perceived as a leader in gender diversity when it is resting on its laurels? One potential reason for this 'slowdown' in Europe highlighted by a respondent to our survey was the implementation of new EU rules concerning parental leave in 2009. The respondent suggested that employers are more hesitant than before the change to the law to take on transformational female talent.

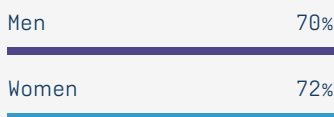
However, Continental Europe remains a fantastic place for gender diversity in the workplace, but complacency is certainly a common concern for many.

Overall gender diversity at your organisation in the past two years has...

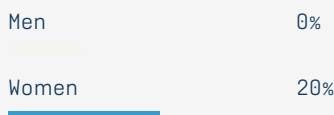
'Improved'



'Stayed the same'



'Become worse'



44%

said their organisation had been **successful** in getting more women into leadership or executive roles

30% said their organisations were committed to achieving gender diversity

30%

SRI Insight

While the results of our research point to a region agitating for further evolutions of change, we must remember that Europe boasts some of the most progressive workplace benefits policies in the world.

Including stipulated 35-hour working weeks in France, many Scandinavian countries enforcing generous shared parental leave policies, and even countries such as Germany seriously considering proposals to ban work related emails after 1800.

If there's one thing that could be done to improve gender diversity in the workplace, what would you wish for it to be?

Men say...



“Facilities for parents including flexible working, on-site facilities”

“Seeing the benefits of varying viewpoints, new dynamics and differing approaches in the organisation.”

Women say...

“Quotas and more female role models”

“A strong commitment of top management, implementation of a survey and specific indicators”



It isn't a perfect environment when it comes to gender diversity, but we in Europe are entering these conversations from a much higher 'base' than other regions around the world.

Thus, the evident lack of progress in the past two years revealed by our research shouldn't send us to panic stations, but we must guard against complacency.



UK & Ireland

Despite myriad campaign groups, press coverage and laudable statements over the past decade in the UK and Ireland about improving gender diversity, our research found a wide gap in opinion between men and women about progress being made.

Overall, awareness of gender diversity leading to better business outcomes is high, with 90% of respondents in agreement, but just over half said their firm was committed to achieving gender diversity in the workplace.

Campaigns, government reviews and other initiatives to champion women on boards in the UK and Ireland seem to hit a roadblock too, as the percentage of women on executive committees of FTSE 350 companies was unchanged at 16 per cent according to a 2017 study.

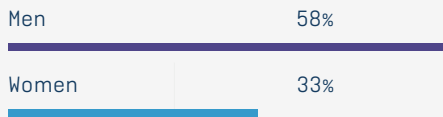
That study is backed up by our research that found less than a third of all respondents saying their firms had been successful in getting more women into executive or leadership roles.

The divergence in opinion between men and women when asked about overall gender diversity in the past two years is similar to what our study found in other regions. Nearly six out of 10 men in the UK and Ireland believe improvements have been made – a sentiment shared by just three out of 10 women.

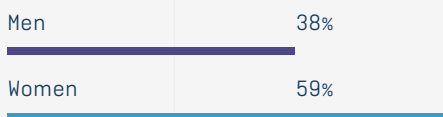
Similarly, only 26% of women in the UK and Ireland felt that their organisations have been successful in getting more women into executive or leadership positions – a statistic that rises to 69% when men were asked the same question.

Overall gender diversity at your organisation in the past two years has...

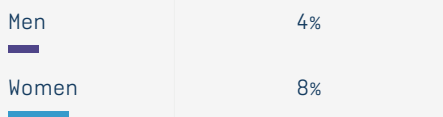
'Improved'



'Stayed the same'



'Become worse'



32%

said their organisations had been **successful** in getting more women into leadership or executive roles

48% said their organisations were committed to improving gender balance

48%

SRI Insight

The first and last steps on any journey are the most difficult.

It's clear from our research that there is broadly unanimous consensus that having a diverse workforce is great for businesses, yet the UK and Ireland are still grappling with transforming that awareness and ambition into concrete action.

The positive responses from the male respondents to our survey indicate that they too are frustrated

If there's one thing that could be done to improve gender diversity in the workplace, what would you wish for it to be?

Men say...



“A board level opportunity to arise, without needing to be engineered”

“Improving pathways to non-executive roles for **all** under-represented populations”

Women say...

“Have a committee within every organisation that discusses gender diversity policy.”



by the slow pace of change and have strong ideas on changes that could be made to really drive gender diversity.

It is up to all of us – business leaders, executive search firms, and individuals – to seek opportunities to make a difference. Working primarily in sport over the past decade has hardened our resolve to help transform the industry for the better.



North America

North America as a region was unanimous in its agreement on the importance of gender diversity. Compared to other regions, North American respondents were more uniform in their perception of the current state of play of gender diversity in the region.

All quantitative responses indicated a high 70th to 80th percentile response in the positive, suggesting that the region is near untied in its mission to achieve gender diversity in the workplace.

Yet, as in other regions, when we analyse the North American results and break them down by gender, it's clear that men and women have significantly differing opinions about progress made, or lack thereof. 18% of female respondents feel that their firm is not committed to gender diversity, and the same percentage believe their organisation has not been successful in getting more women into executive or leadership positions either.

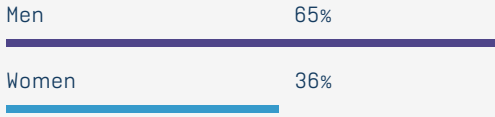
North American men see things differently. Just 3% of men felt that their firm wasn't committed to gender diversity, and only 6% felt they haven't been successful in getting more women into leadership positions.

Illustrating the differences in opinions, nearly two-thirds of men said overall gender diversity had improved in the past two years at their organisations. Just a third of women felt similarly.

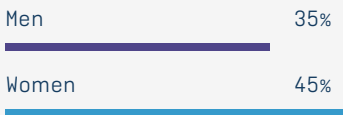
With such a united response in agreement that gender diversity is important for the success of an organisation, it's clear that ambition hasn't wholly turned into action in North America just yet.

Overall gender diversity at your organisation in the past two years has...

'Improved'



'Stayed the same'



'Become worse'



53% said their organisation had been **successful** in getting more women into leadership or executive roles

72% said their organisations were committed to achieving gender diversity

SRI Insight

North America is in a privileged position in that the region quite clearly enjoy almost unanimous agreement that gender diversity is good for business. Yet it's also evident that North America hasn't yet transformed that good will and intentions into action across the board.

Our research revealed that far too many women feel that overall gender diversity has stayed the same or become worse in the past two years for any of us to congratulate each other on a job well done.

If there's one thing that could be done to improve gender diversity in the workplace, what would you wish for it to be?

Men say...

"We need more opportunities for women to pursue tech careers"

"We must break down the unconscious bias barriers"

"Required minimum percentages of positions filled by women"

Women say...

"More women on boards driving change from the top down"

"Attention to gender balance in every division vs. the organization as a whole"

Many of the responses to our question about where real change could come from centred around HR and hiring, with many North American men citing a lack of credible female candidates.

We know it simply isn't the case that there aren't enough exceptional female leaders, but we know too that we must do more to reach out to this vast untapped resource to help our clients drive their businesses forward.

How to take Action

We asked respondents to tell us what changes could be made to really drive gender diversity in their organisations.

The responses varied greatly, but common themes emerged throughout every region:

Equal Pay

The belief for many is that working in environments where there is true pay equality is seen as a huge driver of gender diversity in the workplace.

Our respondents felt that not enough progress is being made in this area and that is contributing to a deficit of women in their organisations.

Flexible working and benefits

Highlighted by a large proportion of our respondents was the need to look again at maternity/paternity policies, and flexible working arrangements in place. Many felt that the world has changed, and no longer operates on a traditional 9-to-5 timetable. Organisations who are confident enough to trust in their staff to work around childcare timetables were perceived to be best placed to retain their female workforce.

Board Positions

Many of our respondents felt that leadership in gender diversity starts at the top of organisations, and the lack of women in senior or executive leadership positions needs to be addressed now.

Mentoring/Training/Talent Identification

Of all of the themes raised, access to mentoring programmes, leadership training opportunities and identifying talented female staff were raised most often - by both men and women.

The underlying message is that organisations need to ensure they are doing everything they can to champion their female talent from the early stages of their careers, so that they become the board members of the future.

Methodology

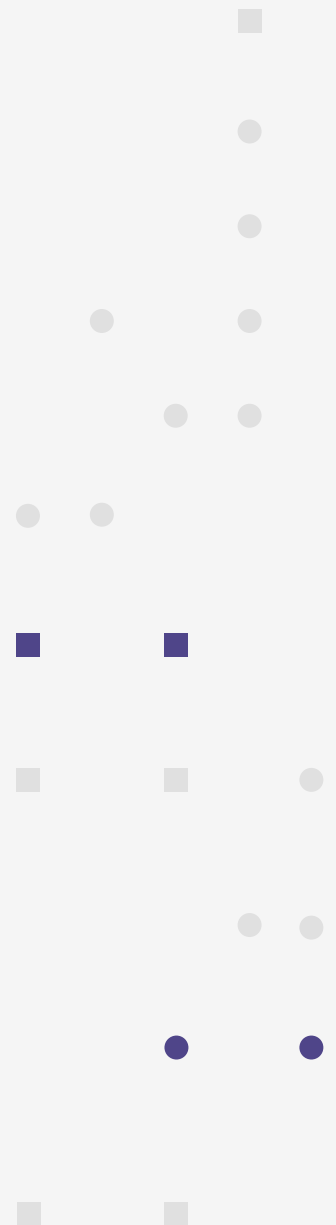
The purpose of the research was to better understand gender diversity issues and potential solutions in the regions in which our firm operates.

To do this we created an anonymous majority quantitative survey consisting of three screening questions (age, gender, location) six Likert scale questions with a five-level item format, and one qualitative question. We asked respondents to our survey to tell us the one change they would wish to see made that would really drive change.

The answers we got in return varied significantly from a desire to see an increased focus on mentoring programmes, legal mandates for equal gender composition on boards, forced paternity leave, equal pay, and flexible working options for all. We included some of these responses throughout the report to give the reader a better idea of the issues and suggested solutions in each region.

The survey was distributed to our clients, colleagues and friends directly via email, in addition to distribution to a global audience via our social media channels. As our audience is skewed towards our core sectors of work (sport, media, technology and entertainment), it follows that the respondents to our survey will largely be drawn from those industries. Our research sample is not scientifically representative of an entire region's workforce, nor should our report be interpreted in such a way.

Fieldwork dates were 29 January 2018 to 19 February 2018.





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