The Future of Women at Work

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Increased gender diversity leads to stronger financial performance

The link between profitability and diversity on executive teams continues to be statistically significant¹

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<thead>
<tr>
<th></th>
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</thead>
<tbody>
<tr>
<td></td>
<td>15%</td>
<td>21%</td>
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| Ethnic Diversity² | 35%                         | 33%                                 |

... and so does the penalty for the least diverse companies³

<table>
<thead>
<tr>
<th>Q4 on both</th>
<th>Q1-Q3 on either</th>
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<tbody>
<tr>
<td>40</td>
<td>57</td>
</tr>
</tbody>
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-29%

1. Average EBIT margin, 2011-15; 2 Varies by geography, but in most cases includes all non-white ethnicities. In the US, we also include Hispanic/Latino of any race. In Singapore, we include only people of Malaysian decent; 3 Executive gender diversity analysed for 991 companies in all regions. Executive team ethnic diversity data analysed for 589 companies all regions except Australia, France, Germany, India, Japan and Nigeria.

Bridging the gender gap alone could increase global GDP by trillions of dollars

Full-potential scenario
$28\text{ trillion}$

Best-in-region scenario
$12\text{ trillion}$

11% increase in global GDP
10 ppt increase in female labour force participation

SOURCE: How advancing women’s equality can add $12\text{ trillion} to global growth (2015)
But the world of work is changing rapidly.
Disruption due to automation is similar for men and women

## Disruption risk is lower and equivalent across genders in Germany

<table>
<thead>
<tr>
<th>Women’s jobs at risk of automation by 2030</th>
<th>Jobs at risk as a share of female employment, %, 2017</th>
<th>Men’s jobs at risk of automation by 2030</th>
<th>Jobs at risk as a share of male employment, %, 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canada</td>
<td>-2</td>
<td>24</td>
<td>-3</td>
</tr>
<tr>
<td>France</td>
<td>-3</td>
<td>22</td>
<td>-3</td>
</tr>
<tr>
<td>Germany</td>
<td>-4</td>
<td>21</td>
<td>-5</td>
</tr>
<tr>
<td>Japan</td>
<td>-6</td>
<td>24</td>
<td>-9</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>-3</td>
<td>22</td>
<td>-4</td>
</tr>
<tr>
<td>United States</td>
<td>-19</td>
<td>24</td>
<td>-20</td>
</tr>
<tr>
<td>China</td>
<td>-52</td>
<td>15</td>
<td>-66</td>
</tr>
<tr>
<td>Mexico</td>
<td>-12</td>
<td>10</td>
<td>-44</td>
</tr>
<tr>
<td>Spain</td>
<td>-3</td>
<td>17</td>
<td>-6</td>
</tr>
</tbody>
</table>

Sector displacement is very different between men and women

Jobs at risk due to automation

- Clerical work
- Services
- Sales
- Professional
- Machine operation
- Craftsmen
- Professional
- Services

Opportunities will be created for both men and women

4 million women
23%

5 million men
24%

However, women are at risk of being left behind

**Challenge**

Professional, Scientific and Technical (PST)
At 15% of all tech roles, women continue to lag behind men

Advanced manufacturing
At 25%, women are also unrepresented

Healthcare
Over 20% of employed women in Germany work in healthcare

**Opportunity**

Organisations can play a role in helping employees navigate these transitions

- Support to re-skill
- Increased flexibility and mobility
- Enhanced engagement with technology

This will be especially important for women and dual career families.
Thank you