



Getting To Equal

How Digital is Helping Close the Gender Gap at Work



Strategy | Consulting | Digital | Technology | Operations

Introduction

One of the most significant accelerators of gender equality in the workplace is already demonstrating its potential. Digital fluency, the extent to which people embrace and use digital technologies to become more knowledgeable, connected and effective, is helping to close the gender gap and level the playing field for women at work.

Getting on the right side of the digital fluency gap can change the picture for women – and their countries – in dramatic ways. At the current rate of digital adoption, developed nations likely won't achieve workplace gender equality until 2065, and developing nations until 2100. But if governments and businesses can double the pace at which women become frequent users of technology, we could reach gender equality in the workplace by 2040 in developed nations and by 2060 in developing nations.

These are among the key findings of new Accenture research that examines the extent to which men and women have adopted and embraced digital technologies, and the influence that has had on their education, employment and advancement. Our research combines survey and published data to create the Accenture Digital Fluency Model, a tool that enables us to analyze the effect of digital fluency on gender equality throughout the career lifecycle.

Digital fluency is no cure-all, and is only one factor helping to narrow the gender gap in the workplace. But we have ample evidence that it is a key factor and acts as an accelerant in every stage of a person's career – powerful in both education and employment, and increasingly important as women advance into the ranks of leadership.

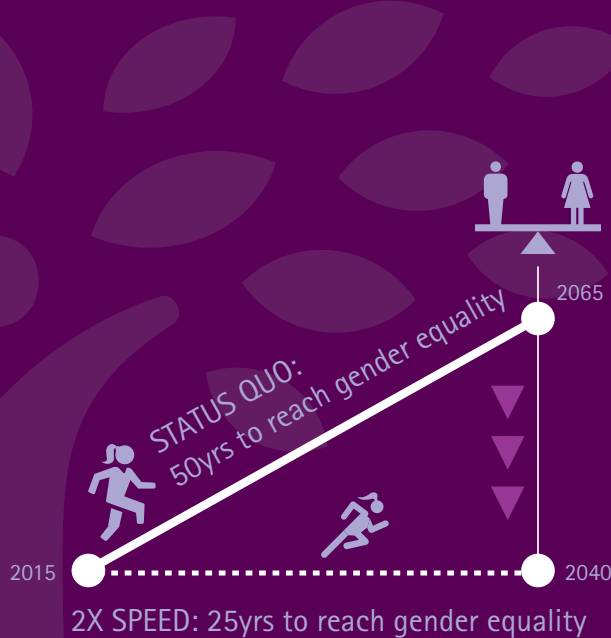
DEFINING THE GAP

We looked at gender equality in the workplace through three specific areas: how women use education in preparing for work; how they do at finding and keeping a job; and how they do in advancing in their careers. In measuring women's progress in education and workplace participation, we looked at data from the World Bank regarding education enrollment and labor participation rates. For advancement, we looked at pay as well as OECD rates of women in managerial roles. Our research shows that digital is helping to drive improvements in these areas for women.

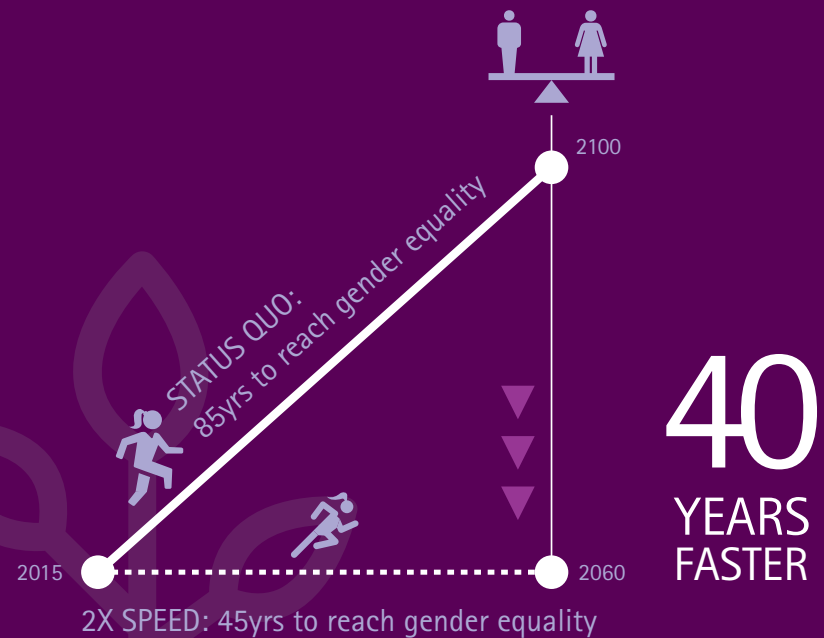


Closing the Gender Gap at Work

DIGITAL FLUENCY IS THE ACCELERANT



Developed Countries



Developing Countries

If governments and businesses can double the pace at which women become digitally fluent, we could reach gender equality in the workplace by 2040 in developed countries and by 2060 in developing countries.



GLOBAL TALENT SHORTAGE:

Women Change the Game

This survey comes at a critical time, as companies and governments face a disparity between the skills they need to stay competitive and the talent available to them.

The World Economic Forum, in its *"2016 Future of Jobs"* report, identified high skills instability across all job categories and noted: "Net job growth and skills instability result in most businesses currently facing major recruitment challenges and talent shortages, a pattern already evident in the results and set to get worse over the next five years."

A report from ManpowerGroup also found that more than half of executives believe that talent shortages affect their ability to serve customers. The report goes on to say that 20 percent of global employers lack strategies to tackle these talent gaps – with 45 percent of leaders at these organizations citing a lack of digital skills and capabilities as a key barrier to filling their talent shortfalls.

Because women are underrepresented in the workforce in most countries, they are a significant source of untapped talent. According to WorkplaceTrends.com and Saba data, women comprise less than 40 percent of the global workforce today, and the World Economic Forum's *Future of Jobs* report notes that women hold fewer line roles across multiple industries.

Part of the solution to the barriers women face in the workplace, including societal and family restrictions, lies in what Accenture research calls "the liquid workforce." The *Accenture Technology Vision 2016* reports that organizations must focus on enabling people – consumers, workers and ecosystem partners – to accomplish more with technology. This growing use of technology will help everyone balance their personal and professional lives and access new opportunities in an evolving work environment.

"Net job growth and skills instability result in most businesses currently facing major recruitment challenges and talent shortages, a pattern already evident in the results and set to get worse over the next five years."

2016 Future of Jobs report, World Economic Forum

THE DIGITAL FLUENCY MODEL:

Do You Speak Digital?

To identify and better understand the role of digital fluency in workforce gender equality, we developed the Accenture Digital Fluency Model. We began with a survey of nearly 5,000 women and men in 31 countries to gauge their use of digital technologies – the devices they have access to, from smartphones to wearables, and how and when they used them. We also asked specifics about their education and career, such as if they had ever taken virtual coursework through an online university, how they used digital collaboration tools, instant messaging or webcams to help them at work, and whether their company was preparing to place more women in senior management roles than in years past.

We also looked at secondary data from the ITU (International Telecommunication Union) – the United Nation's agency for information and communication technologies – to determine rates of Internet usage in every country we studied.

When combined, these two data streams provide a detailed and highly nuanced picture of the extent to which men and women are benefitting from digital in each of the countries we studied. Taken together, these measurements add up to each country's digital fluency score and reveal the gaps between men and women, and how and where those gaps are closing.

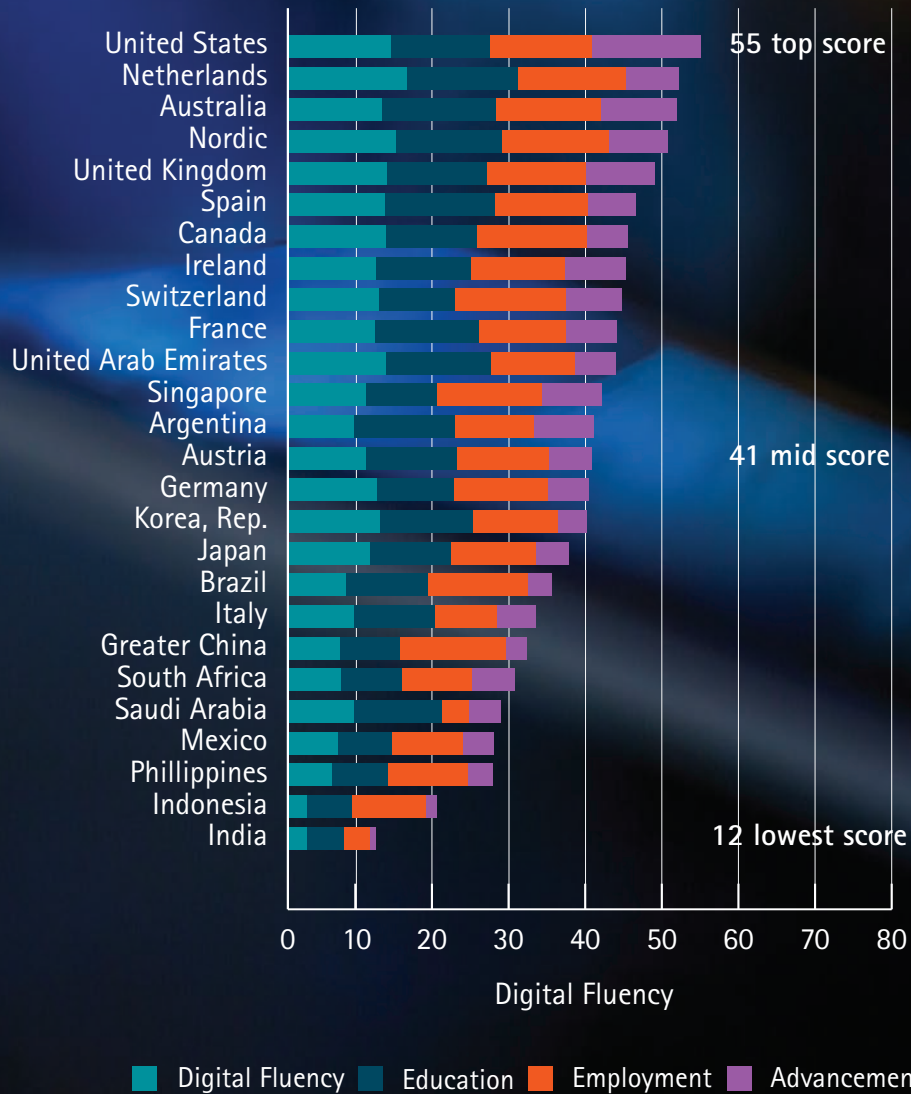
This Digital Fluency Model enables us to understand not only how digitally fluent women are compared to men, but also how much that fluency is helping to drive positive changes in their education, their employment experience and their advancement at work.



If you are digitally fluent, it can provide a positive effect throughout your entire career lifecycle, and the effect benefits women more than men.



The Accenture Digital Fluency Model Overall Scores for Women



SNAPSHOT: U.S., JAPAN & INDIA

The United States has the highest overall score in our study, and the gender gap is one of the smallest among the countries we studied. The U.S. still has far to go to achieve genuine equality in the workplace. But with the help of digital fluency, American women have made significant progress in education, employment and especially advancement.

Japan measures very low equality between men and women. Japanese men outscore women in all metrics, including education, and Japan's advancement scores are among the lowest in our model. While increased digital fluency will help shrink some of these inequalities, it's clear that Japan as a nation will need to address long-standing cultural beliefs and practices before they can truly maximize their female talent.

India has the lowest overall score of all the countries in our model, and these low scores are affecting women's progress in employment. India also has one the largest gaps in the overall score between men and women. Saudi Arabia and UAE are the only countries where these gaps are greater.

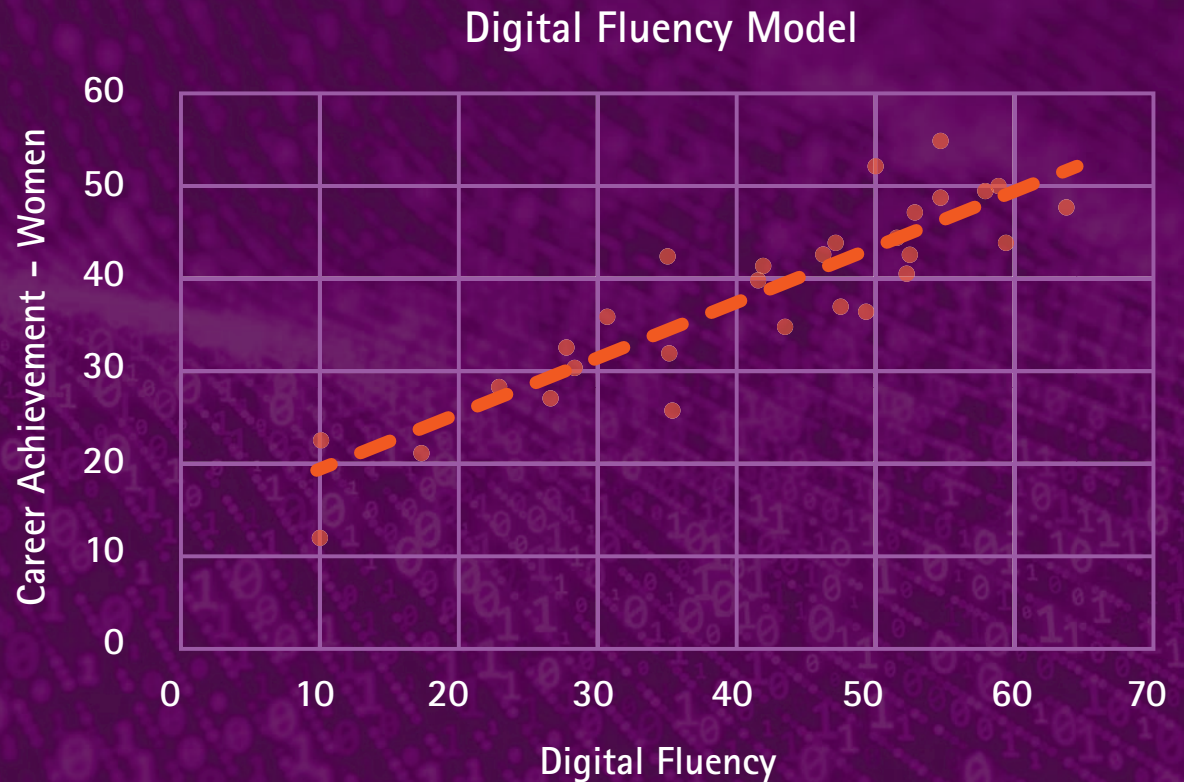
Key Findings

HIGHER DIGITAL FLUENCY RESULTS IN INCREASED WORKPLACE GENDER EQUALITY

Our analysis highlights the importance of digital fluency in helping countries progress toward equality in the workplace. Differences in the digital fluency of men and women, and between countries today, mean every country is at a different stage of this journey and must address a different set of priorities.

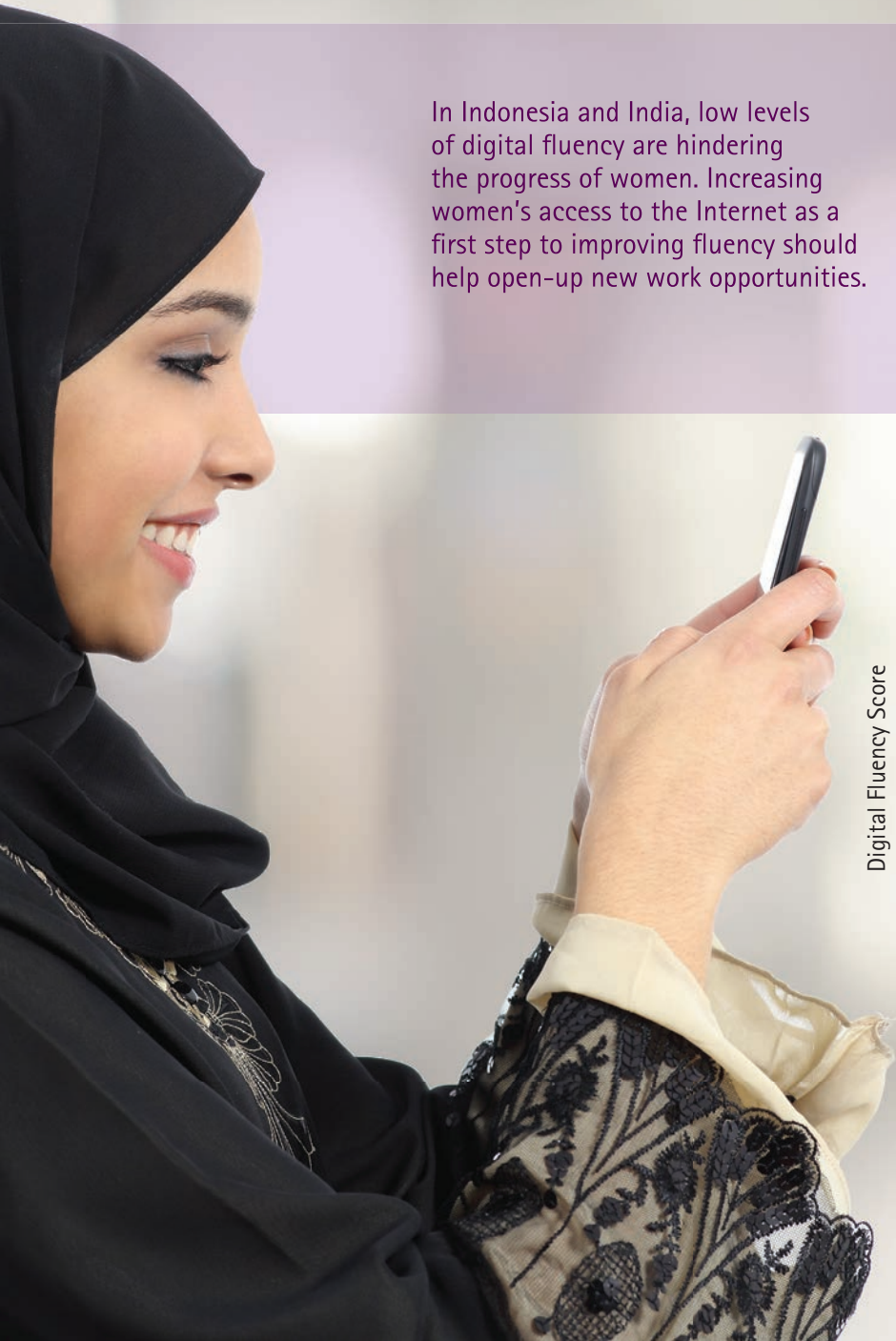
Why do men score better than women in more than three-quarters of the countries we studied? We know from our survey that men use digital more frequently than women: 76 percent of men versus 72 percent of women. Millennial men use digital channels at the even higher rate of 80 percent, and millennial women at 75 percent. We also know that men are more proactive than women in learning new digital skills: 52 percent of men versus 45 percent of women say they're continuously learning new digital skills.

Our Digital Fluency Model shows that nations with higher rates of digital fluency among women have higher rates of gender equality in the workplace. The U.S., Netherlands, UK and Nordic countries (Sweden, Denmark, Norway and Finland) have the highest digital fluency scores in our sample and rank among the top performers on workplace equality.



Dots represent individual country results

Source: *Getting to Equal: How Digital is Helping Close the Gender Gap at Work*, Accenture 2016

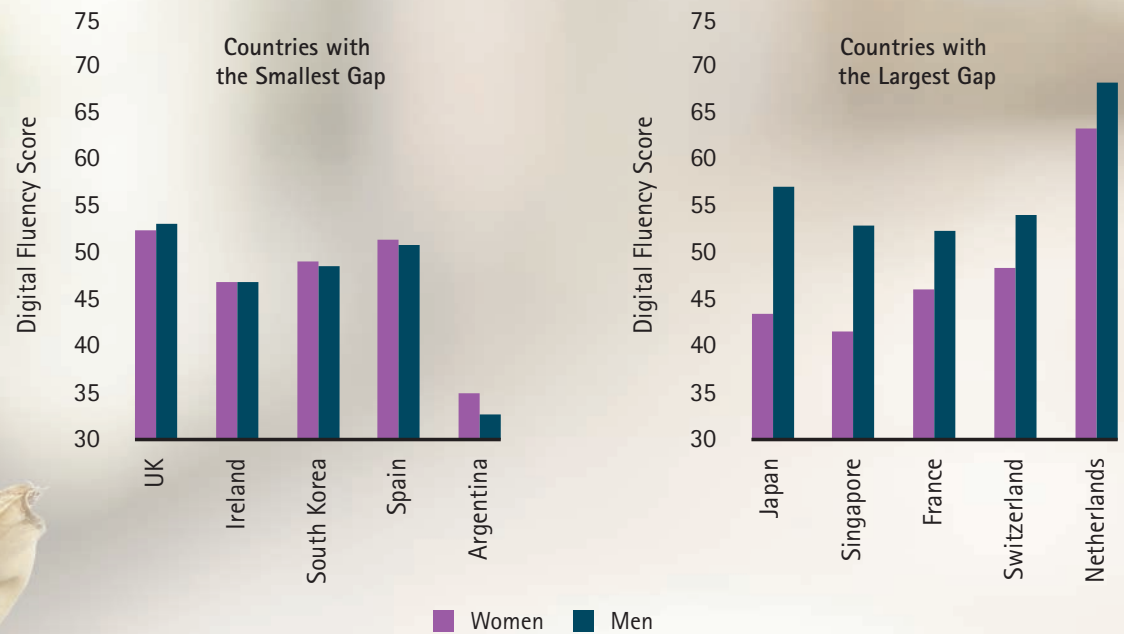


In Indonesia and India, low levels of digital fluency are hindering the progress of women. Increasing women's access to the Internet as a first step to improving fluency should help open-up new work opportunities.

The largest gaps between the digital fluency of men and women appear in Japan, Singapore, France and Switzerland. Here, increasing women's fluency to the level of men's will help drive equality in the workplace. Countries like Saudi Arabia, and to a lesser extent Italy

and Japan, have reasonable levels of digital fluency, yet are not achieving the outcomes we would expect. Digital fluency alone is clearly not the solution for every country – cultural factors are another significant consideration.

Digital Fluency Gap Between Men and Women



Source: *Getting to Equal: How Digital is Helping Close the Gender Gap at Work*, Accenture 2016

EDUCATION: WOMEN'S RATES RISING MORE RAPIDLY

It is clear from our data that women in many countries are already better educated than men, and we found that women's digital fluency is helping to drive these outcomes.

Women attained higher levels of education than men in well over half of the countries we studied. At the same time, the rate of higher education for working women has nearly doubled in one generation. More than half of Generation X women earned a college degree or higher, compared to only 27 percent of their mothers.

Digital fluency has also had a more positive impact on the education of women in developing countries than in developed ones: more than two-thirds (68 percent) of women in developing countries, versus less than half (44 percent) of women in developed countries, say that the Internet was important to their education.

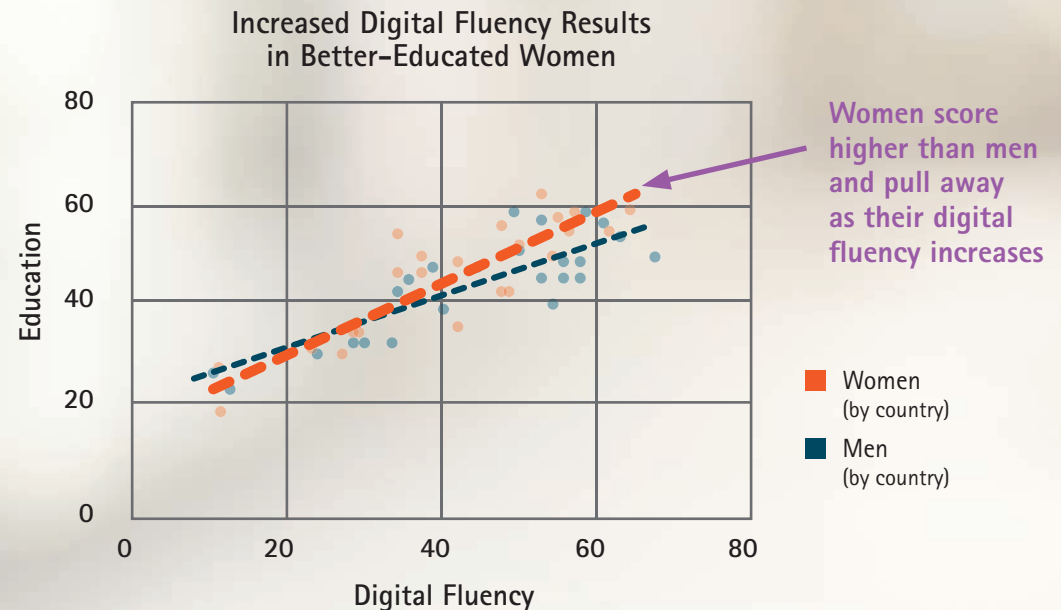
In short, women seem to be leveraging digital through their education to a greater effect than men. Our analysis shows that when men and women have the same level of digital fluency, women have achieved a higher rate of education.



WOMEN'S EDUCATION

To gauge women's education levels, we used data from the World Bank regarding the enrollment of women in secondary and higher education. We also analyzed how people use digital to support their education by asking our survey subjects some basic questions, such as:

- How did their level of education compare with that of their mother?
- Did they consider the Internet to be a "must-have" resource for them in their studies?
- Had they ever taken virtual or remote coursework through an open or online university?
- Were they more likely to use a college library or to access their course materials online?
- Had they viewed recordings of lectures online?



Source: *Getting to Equal: How Digital is Helping Close the Gender Gap at Work*, Accenture 2016

EMPLOYMENT: DIGITAL HELPS WOMEN GAIN FLEXIBILITY

While men currently have an employment advantage, the gap is closing because of a significant rise in digital fluency driven outcomes for women.

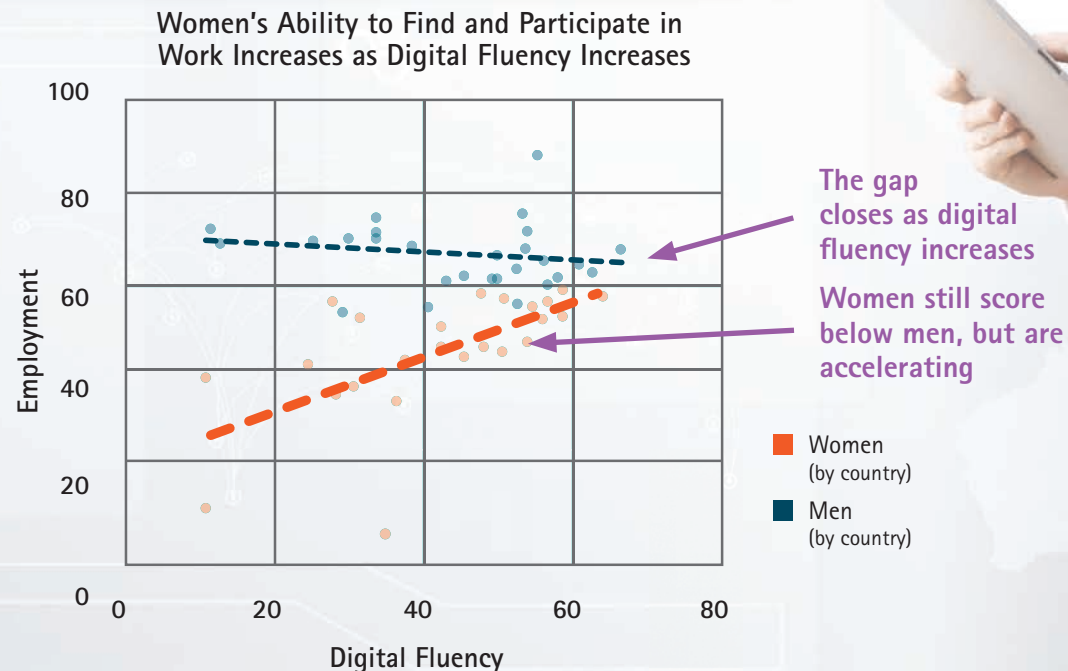
Why is this? Digital fluency is helping today's workers better manage their time and become more productive. Digital fluency also enables greater work flexibility – an amenity that workers value and companies are now providing. While men and women alike are liberated by the balance that work flexibility affords, women appear to derive greater value from it.

More than two-thirds of the women and men we surveyed – 72 percent and 68 percent, respectively – say that women's employment opportunities increase as digital fluency increases. In addition, almost half of the working women said they use digital to work from home and to access job opportunities: 41 percent said digital helped them balance their personal and professional lives, and to access job opportunities.

WOMEN'S EMPLOYMENT

To assess women's employment levels, we looked at data from the World Bank regarding labor participation rates among women. And to establish the impact of digital on women's employment we asked our survey subjects about:

- The links between digital and their job searches;
- The links between the types of jobs available and how they access opportunities;
- Their networking and social media habits;
- Their use of digital collaboration tools, such as instant messaging, email and webcams;
- The value they place on having flexibility in when, where and how they work; and
- How increased flexibility from digital is reshaping the workday or helping them return to work.



Source: *Getting to Equal: How Digital is Helping Close the Gender Gap at Work*, Accenture 2016

ADVANCEMENT: OPPORTUNITIES ARE EVOLVING

Although digital fluency clearly helps women train for and gain employment, the relationship between digital fluency and women's advancement is not as significant.

We expect this will change as more millennial women and digital natives move into management — our research found nearly six in 10 millennial women surveyed aspire to be in leadership positions. And more than three quarters of all survey respondents believe that women have more opportunity today than ever before.

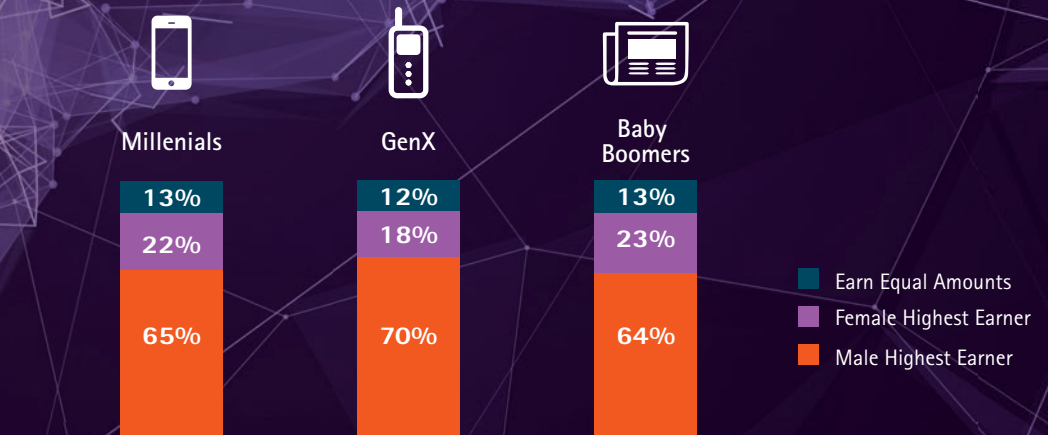
We also found that, while digital fluency is having a positive impact on pay for both men and women, the gap in pay between genders is still not closing. Men are, by far, the dominant earners by household across all three generations — Millennials, Gen X and Baby Boomers.

WOMEN AS LEADERS

To understand how women are advancing into leadership roles at work, we established the macro picture by looking at the percentage of women in managerial roles using data from the OECD (Organization for Economic Cooperation and Development). We also asked our subjects if:

- They aspired to be in a leadership position at work;
- They thought they had the skills to be a leader in their organization;
- They felt that women today had more opportunity to advance in their careers than they did 20 years ago, before the digital age;
- They had positive role models within their current leadership; and
- If their company was preparing more women for senior management roles compared to years past.

Men are Dominant Earners by Household



Source: *Getting to Equal: How Digital is Helping Close the Gender Gap at Work*, Accenture 2016

OPPORTUNITIES: MORE WOMEN ENTREPRENEURS AND MORE REJOINING THE WORKFORCE

Digital fluency is also creating opportunities for women entrepreneurs and women who are considering rejoining the workforce.

For example, many women want to be entrepreneurs and know that digital fluency will help them achieve those goals. This is particularly true in the emerging markets, where women are more than twice as likely as those in developed markets – 61 percent versus 29 percent – to say they want to start a new business in the next five years.

We also found that digital fluency is removing many of the barriers that non-working women said kept them from working. For instance, almost 60 percent of women who are not currently employed said that working from home or having more-flexible hours would help them find work.

Perhaps most encouraging, nearly three-quarters (71 percent) of men and women alike said that “the digital world will empower our daughters.” Clearly, the changes we are seeing in women’s lives as a result of digital fluency are here to stay and will become more pronounced with future generations.

Percentage of Women Who Would Like to Start a New Business in the Next Five Years



61% of Women
in Developing Countries

29% of Women
in Developed Countries

Source: *Getting to Equal: How Digital is Helping Close the Gender Gap at Work*, Accenture 2016

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Methodology

Within our Digital Fluency Model, our core metric for both men and women, country to country, is their digital fluency score. This score is measured in aggregate as well as for each country studied. Through digital fluency, we looked at the extent to which both men and women have embraced digital technologies to become more knowledgeable, connected and effective. We note the significant gender gaps and how they vary by country and region.

Our digital fluency scores provide an overall measure of the impact of digital on working men and working women today by country and by generation. We developed these scores using three principle research components:

1. The collection of internationally comparable, published data on the core dimensions of our study: education, employment, advancement at work and the use of digital technologies.
2. A survey of more than 4,900 working men, working women and non-working women across 31 countries. Our sample was constructed to ensure an equal representation of working men and women, and an equal split across the generations (Baby Boomers, Generation X and Millennials) and to include those working in large, medium and small businesses. Countries included in the Model are Argentina, Australia, Austria, Brazil,

Canada, France, Germany, Greater China (includes Hong Kong and Taiwan), India, Indonesia, Ireland, Italy, Japan, Mexico, Netherlands, the Nordics (Denmark, Finland, Norway, Sweden), Philippines, Saudi Arabia, Singapore, South Africa, South Korea, Spain, Switzerland, United Arab Emirates, United Kingdom and United States.

3. The two data sets comprising the working population were combined within our Digital Fluency Model and structured around a digital enabler or "Digital Fluency" (the factor that drives change) and "Career Outcomes" (measurable impacts such as an increase in the portion of the population achieving higher education).

Our projection that gender equality in the workplace can be achieved by 2040 in developed countries and by 2060 in developing countries is based on panel data regression analysis, a technique that helps isolate (to the best of statistical possibilities) the effect of digital fluency on outcomes after controlling by cross country and generational observed and unobserved factors that can be also driving changes in the workplace.

The Digital Fluency econometric model proved to be robust along many specifications and demonstrated a very high "goodness of fit" and significance of

digital fluency as a driver of gender equality in the workplace. Provided that certain assumptions are met, the econometric estimations allow us to answer a series of "what if" questions: what would happen to the outcomes in education, workplace and advancement if the digital fluency scores change. In each instance we were able to project the speed at which gender equality could be reached in the workplace when women become more digitally fluent.

The panel data regression analysis modelling technique is used by respected research organizations including the World Economic Forum, the World Bank and the Organization for Economic Cooperation and Development (OECD).

4. Using a linear model, we find that the relationship between Digital Fluency and Career Achievements is positive, higher for women than for men and statistically significant at the 1% probability level. Put more simply, there's a very low probability that the true relationship between digital fluency and achievements is different from the statistical relationship estimated by our model.

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About Accenture

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