

Opportunity Now

Project 28-40

The Report



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Headline recommendations

and key findings

Headline recommendations

- If you are serious about change, you as CEOs and senior leaders need to take the lead on women's progression, moving this from a diversity initiative to a core business priority. Set aspirational targets for the numbers of women you want to see at each level in your organisation.
- Prioritise the development of excellent managers at every level of your organisation.
- Create a truly agile organisation, with women and men able to work in a way that makes them productive and engaged. Look at job design, technology, agile teams, and defeat the flexible working stigma that holds women back. Allow for non-linear careers – your top talent will have times in their lives they need to take a step back.
- Recognise that harassment and bullying still occurs, despite well-meaning policies. Call it out, deal with perpetrators, and make it simple and straightforward to report.
- 28-40 women. Build your network – be in a position to know about opportunities as they come up. Get real on sponsorship – identify senior people who will advocate for you. If you want a mentor, ask them.

Key findings

1. This report is a reality check for UK employers – there is a gap between organisational policies and the actual experiences of 28-40 women at work, including real challenges on bullying and harassment.
2. Women want excellent line management and basics at work – this is far more important than creating more female-only programmes.
3. There is plenty of good news – women are ambitious and confident, and are actively seeking opportunities to advance their careers. Companies are also trying hard – but their efforts are often off-target.
4. Not all women are the same. It is important for employers to recognise several phases and different evolution of women's careers and ambition, and to recognise that women of different backgrounds and identities may face particular challenges.
5. Flexible working is essential to women in balancing their commitments, yet the stigma attached can be an obstacle to progression. If companies get this right employee engagement and productivity can be enhanced – for everyone.
6. Women returners – an opportunity for employers. Many mothers feel their employer is not doing enough to back them up in balancing their responsibilities at work and home – they want to work hard, but to be measured for outputs, not hours worked.

Before they have children women are nervous about the impact of parenthood on their career. Role models and honest conversations with managers can help.

7. The lives of senior executives appear unappealing – despite women's ambition, their perception of lifestyle at the top is putting them off. We need senior women and men to speak about what they enjoy about their jobs, and how they make it work.
8. A perceptions gap between men and women is creating an obstacle to solving the gender imbalance. Women see unfairness in pay and in access to career progression opportunities and feel that their organisational culture is male-dominated. Men do not recognise these barriers. When men, who hold the majority of senior leadership positions, can start to see the challenges women face, we will make progress.
9. Whilst the emphasis is on employers to change, women can contribute to creating their own opportunities by speaking up and strategically planning their careers.
10. Project 28-40 is about making work better for everyone – our survey found that many workplace priorities are shared by women and men. This is a chance to radically reassess and to create modern working practices and more highly engaged employees.

Forewords



28-40 is a critical age for career development – the danger zone where women are not promoted at the same rate as men – a problem not just for women but for companies too. This survey, the largest ever undertaken, has given us invaluable insights into how to tackle this.

25,000 people (23,000 women and 2,000 men) told us their stories, and we tested the findings in focus groups and interviews with chief executives.

Women have told us that they are ambitious, confident and feel supported by their partners in their career aspirations. They feel much less encouraged by their employers, however, both in respect of career development and the workplace culture, where bullying and harassment are still prevalent.

This lingering gap between the inclusive and fair cultures companies are aiming for and the reality, is disappointing but gives us all scope to take action.

If we are serious about change, CEOs and senior leaders need to move the development of female talent from a diversity initiative to a core business priority. We can each set aspirational targets for better

gender balance at every level of our organisations – and track our progress.

Excellent managers are the key – getting the basics right will achieve much more than yet another initiative or programme.

Technology also gives us new opportunities to re-think working practices, to be innovative and thoughtful about how to make work work better – for everyone. A really agile organisation, where women and men are responsive and engaged, delivers the best results and allows individuals to be productive and to build sustainable careers.

I hope you find the report useful.

**Helena Morrissey CBE, Chair,
Opportunity Now. CEO, Newton
Investment Management**



Project 28-40 gives us real insight into the needs, opinions and aspirations of the 25,000 women and men who filled in our survey. This report gives you a first look at what they told us, and what we now need to do.

As well as the recommendations in this report, Opportunity Now is publishing an online document with detailed recommendations for organisations who want to turn the words in this report into action.

This is just the beginning for Project 28-40. The huge volume of data – including firsthand stories from women, detailed in open text responses – will continue to drive forward our campaigning, starting with sector analysis which we will publish later this year.

Thank you to everyone who got us this far, and especially to Helena Morrissey who, as our chair, has taken Opportunity Now to a new level.

Opportunity Now has been campaigning for women at work for 23 years. We know that our work exists in a wider social context – the barriers women face are rooted in society more broadly, not just the workplace, and public policy has a role to play – but we know that what happens at work matters. Project 28-40 gives us 25,000 voices to drive real change.

**Kathryn Nawrockyi,
Director, Opportunity Now**

Introduction

We are at a point of transition. The 20th century saw a huge shift in the status and scope of women's participation in the workplace. Women now make up some 47% of the UK workforce, and at their most successful are running some of the largest institutions in this country.

However women are under-represented at the top. There is still a gender pay gap. Many industries and sectors struggle to attract and retain female talent. Yet there is no shortage of talented, ambitious women in the UK. Project 28-40 seeks to identify the hidden tensions within workplace cultures that may explain why UK employers are struggling to create a more gender-balanced workforce.

Workplaces have developed over time on the basis of underlying assumptions about what is needed to be successful – full time, long hours, and no commitments. In the 21st century workplace, this male breadwinner model has to change. An agile way of operating is good for organisations in a global knowledge

economy, and good for all of the women and men whose commitment to their work runs alongside commitments to families, friends and communities.

The women and men who responded to Project 28-40 told us about the tensions they feel as they seek to balance the different parts of their lives, and make big decisions about their careers.

Personas

Women are not all the same – their ambitions, achievements and circumstances vary significantly, and with it their experiences of work. Project 28-40 has broadly identified 6 distinct types of women, or 'personas', with the main differentiating factors being the

woman's level of ambition at work, what she wants from life outside work and the level of support that she has, both inside and outside work.

These personas reflect what women aged 28-40 are telling us about their experiences and what they want from work, and life. As we continue our analysis we will build and expand the personas, taking account of, for example, levels of engagement and desire to progress.

As a woman progresses through her career and through life her persona may evolve as she adapts to changes inside and outside work. As women's lives change, their overall priorities and levels of ambition at work may also shift for a period of time.

Personas: Women 28-40 in the workplace: 6 key groups

Nervous returner	Focus on life outside work	Career on hold for now	Ambitious and anxious	Flexible and conflicted	Career fulfilled
					
On maternity leave, career break or has left employment to have children, but wants to return.	Flexible or full-time worker, has children, not interested in progression. Main focus is life outside work.	Flexible worker, but has put career on hold until children are older. May feel under valued.	Works full time, single or has no children. Ambitious and able but finds it difficult to climb the career ladder. Not sure if she wants the senior lifestyle.	Flexible worker, has children, and plays a main carer role. She is keen to progress but is struggling. Views senior lifestyle as unattractive.	Full-time or flexible worker, main wage earner. Maybe single or has a partner who is the main carer for their children. Very career focused.

“Plenty of us want to out-earn men and are ambitious and keen to double what we earn. We are not all some stereotype home maker. Plenty strike up on their own to double their earnings. Had (law firm) made me an equity partner I would have stayed!”

Survey respondent

This persona analysis helps to pinpoint the key work-related barriers that not only affect women's progression but also impact on retention levels and the likelihood of women returning to work after career breaks or maternity leave.

This research explores how these evolving personas experience work. It demonstrates that it is not women who need to change, but the workplace - and society. Negative perceptions and poor management of flexible working, and all too common experiences of bullying and harassment are just some of the cultural barriers holding women back. Employers need to take action now to halt the downward spiral that is holding back talented women from reaching their full potential in the workplace.

This report sets out these conflicts and tensions in more detail and offers some solutions. Women's development and leadership

programmes, however good, are not enough. We need a revolution in how organisations operate, based on a fundamental rethink of the world of work, the needs of employers, and where work fits in people's lives.

Why women?

The survey was aimed at women because we wanted to provide a unique opportunity to listen to the views, experiences and stories of women. We want to listen to what women have to say and take action to change the status quo, enabling women to fulfil their potential and employers to benefit from access to increased, more diverse talent.

We also wanted to hear from a control group of men to enable us to test the validity of the findings. We conducted focus groups with men in order to gain further insight into the findings and emerging differences between men and women in the survey.

Why 28-40?

In recent years there has been major national focus on women on boards and women in the executive pipeline, however the reasons fewer women (than men) advance to this senior level are not well understood. This age bracket appears to be a critical time for women's careers. Up until the age of 29, the split of men and women in the top 10% of earners is reasonably equal, however in the age bracket 30-44 this drops significantly to 28% women versus 72% men and then plateaus (ONS data). The average age for a woman to give birth to her first child is 28 and employment rates for women start to level off from this age onwards.

Terminology

The focus of this research is women between the ages of 28 and 40 years. For brevity, when we refer in the report to “female respondents” or “women” in the context of survey findings, please understand this to refer to female survey respondents aged 28-40, unless otherwise indicated.

“Organisations still need to champion this. I have found in the last few years a bias in my own organisation, I am more likely to have this conversation with a female: ‘We really want you, it's you we picked, so can you bring the attributes of you as a person as that's what's going to make the difference’.”

Steve Holliday, CEO, National Grid

Section One: The good news – breaking down the myths

The overwhelming response from Project 28-40 is that women are ambitious and confident. Over three quarters of female respondents have confidence in their ability to lead a team; 70% have the desire to lead. Women are actively seeking opportunities to advance their careers.

It is a widely held belief that women are less ambitious than men and that they have less desire to progress in their careers. The responses to Project 28-40 explode that myth. It is hugely encouraging that women are ambitious and determined to succeed.

The question remains: why do more men than women reach senior leadership positions?

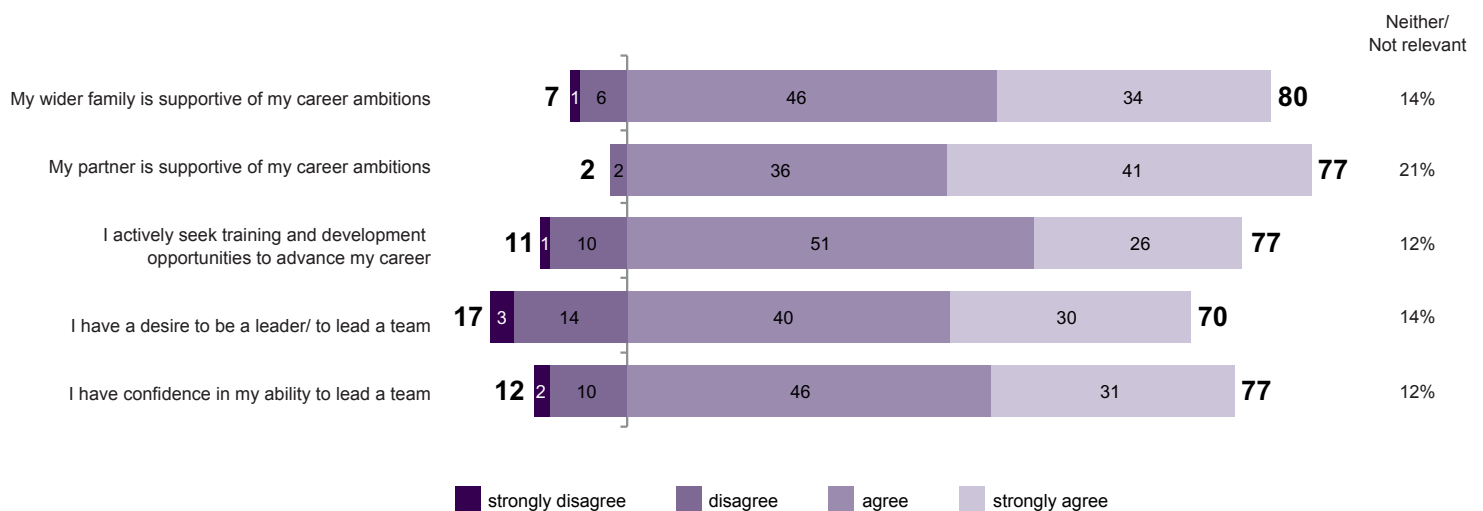
In recent years, employers have invested in a variety of positive actions targeted at women. Diversity initiatives and resources, mentoring

programmes, women's networks, and leadership programmes targeted at high potential women are all usually available in large organisations today. These efforts are mainly designed to build women's confidence, although they have had limited success in terms of improving gender balance at all levels. Indeed, organisations are frustrated that not enough progress has been made towards building a pipeline of talented women.

By focusing mainly on women (as opposed to workplaces) and treating women as a single homogenous

group, efforts to date have been wrongly targeted. Organisations need to do more to recognise that for many employees work isn't working. Discrete initiatives are important, but on their own are not enough to achieve change. A more fundamental shift is needed, one that places greater focus on line managers to shift workplace behaviours and requires stronger leadership to convey into policy and practice that women are not all the same.

Women aged 28-40: women don't need to change

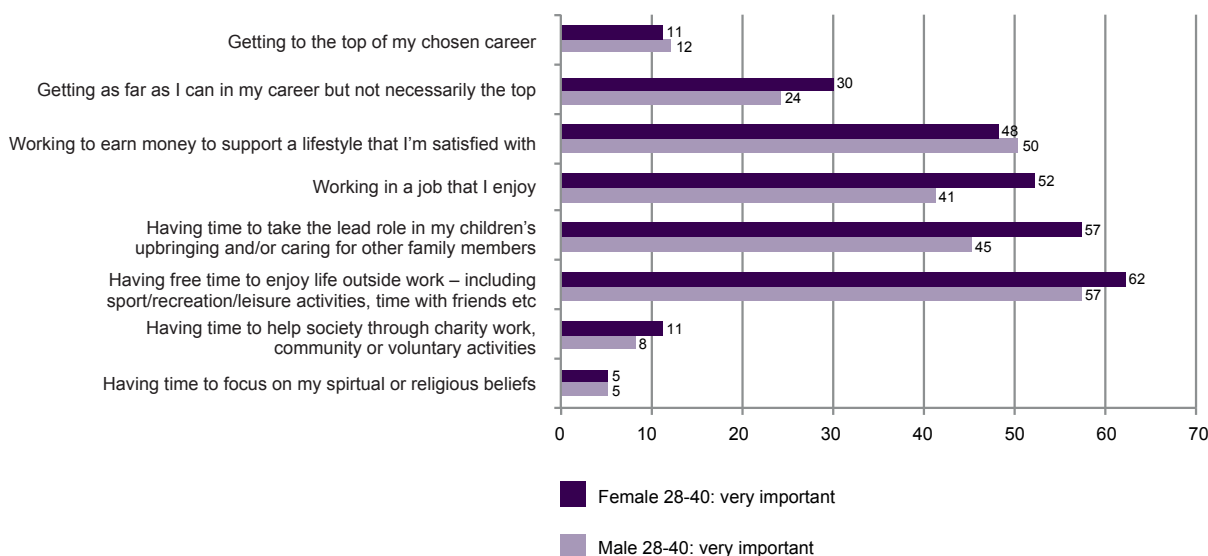


Women's ambition is broader than that of men. When we asked women and men what was important to them in life there were similarities, although women tended to have a wider range of interests and ambitions.

"I have worked incredibly hard to achieve what I have. However, without realising it and because I do have an incredibly supportive husband and family, I put work first and colleagues/clients and managers do not always consider your day to day family commitments".

Survey respondent

Women and men aged 28-40: how do you feel about your working life so far?



Women are significantly more likely to want a job that they enjoy, to be intellectually fulfilled, to take a lead role in bringing up children, and to have time for activities outside work.

On another positive note, women told us that they received encouragement at home: over three quarters of

women told us they feel supported in their career ambitions by their partner and wider family. This was similar to how male respondents felt and is another signal that the barriers women face are workplace-related and not about the women themselves or their levels of support and encouragement at home.

"We have more mentors in place for senior women than we do for senior men".

**Simon Michaels,
Managing Partner, BDO**

"I am very lucky that my husband gave up work when we went to the US. We struck a deal about how we were going to run our life and achieve our goals together, which meant that he stayed at home and looked after the boys and pursued his interests. I genuinely believe you do need to put in support mechanisms whoever you are, whatever you do".

Debbie White, CEO, Sodexo

Career fulfilled



Full-time or flexible worker, main wage earner. Maybe single or has a partner who is the main carer for their children. Very career focused.

Section Two: Work-life conflict and returners

Women still feel conflicted about balancing career and family and the vast majority of those without children (that want them) are nervous about the impact having children will have on their careers. While most women feel supported by their partner and wider family to develop their careers, only 52% feel supported by their employer to do so. Organisations need to shift their focus from women's development to addressing workplace culture and practice, and deal with powerful stereotypes that have a negative impact on women and their progression in the workplace.

Work-life conflict

Women are pessimistic about their ability to manage home life and progress to more senior levels.

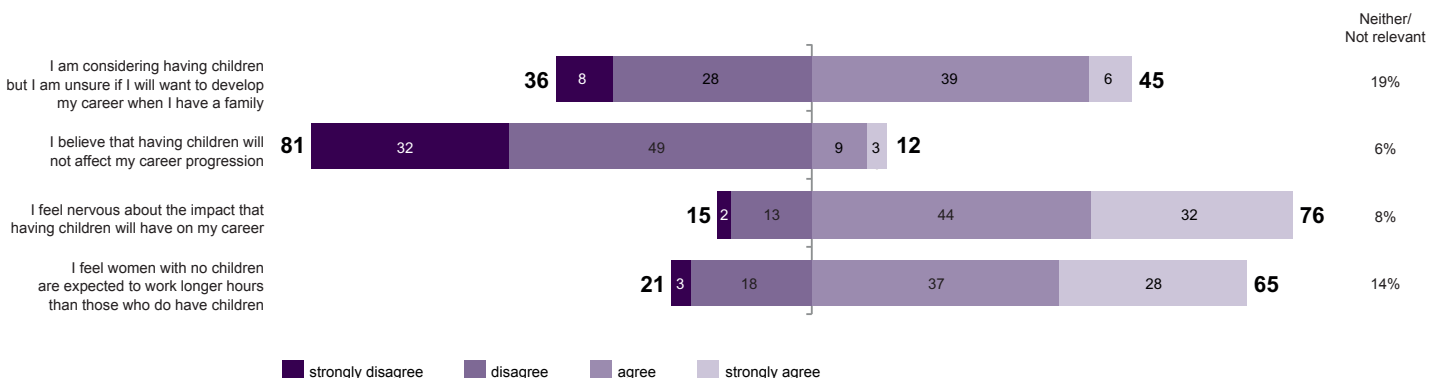
Three quarters of female non-parents said they were nervous about the impact that having children will have on their career, compared to only a third of men. Whilst overall men and women want broadly the same things from work, women placed greatest importance on work-life harmony. Men in the same age group said they wanted to provide for their family. Women are ambitious but anxious and unsure about how to manage their work and family priorities.

For those women who do not expect or plan to have children, often the concern stems from a conflict between their interests and responsibilities outside work (caring for elderly relatives, social activities, community involvement and commitments) and a fear of the impact that promotion to a more senior position will have on their lifestyle, and for some, their health and well-being. These women, despite their ambition, are not prepared to give up everything for work.

“Women-friendly policies in the workplace are centred around mothers – single women also have outside interests which they want to pursue (which does not include being regularly asked to cover for colleagues working part time or from home)”.

Survey respondent

Women aged 28-40: non-parents



“When I was off for maternity leave, I was faced with terms like ‘show commitment’ and ‘re-establish your behaviour’ and ‘re-evaluate your behaviour.’ When I was off work, and when I returned I was supported, but career progression is not something I am now expected to want”.

Survey respondent

Flexible and conflicted



Flexible worker, has children, and plays a main carer role. She is keen to progress but is struggling. Views senior lifestyle as unattractive.

Back to work

It is not surprising that many women who currently do not have children but would like to, including nearly a third at Board or Director level, also expect to return to work under a flexible working model. Smart organisations will support them to achieve this.

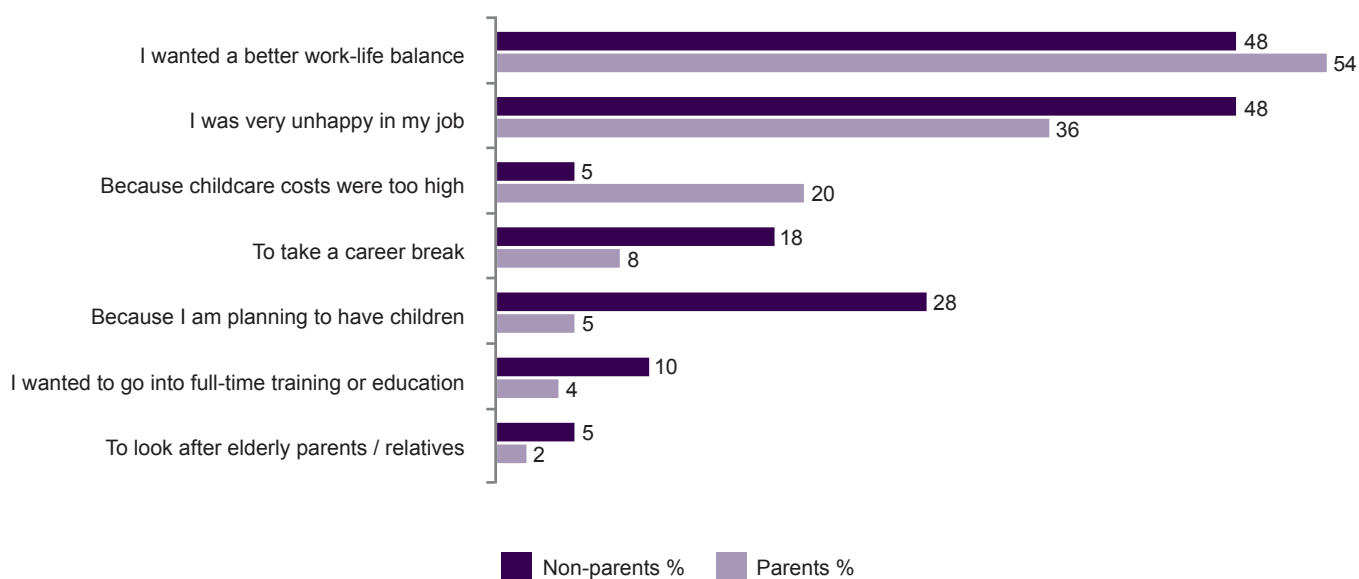
Women returners

Many women on career breaks would like to return but are pessimistic about their prospects of progressing and fear that they would not be given the same stretch opportunities if they did return. Half of female respondents thought working opportunities are not equal between mothers and non-mothers. Women returners often feel isolated and struggle after having a second child or taking on more caring responsibilities, such as looking after elderly parents. They would

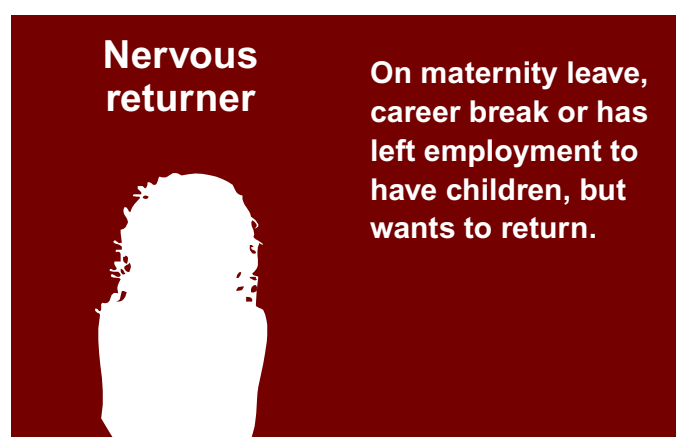
value more support and empathy from their employer and their line manager in order to harness their fullest potential.

We asked women who had left work to tell us their main reasons for leaving. Unhappiness in their job and wanting a better work-life balance were the most significant explanations given by both parents and non-parents, with one in five female parents having left work for these reasons, compared with only 1 in 10 men.

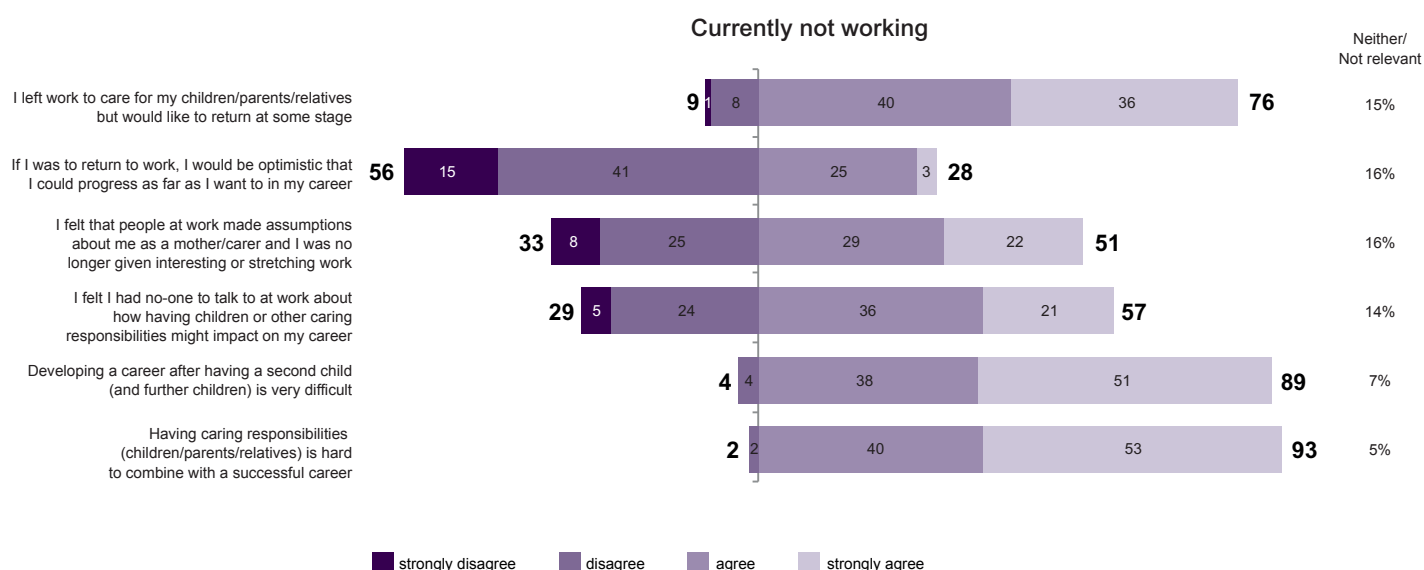
Women aged 28-40: why women leave work



We know that most women without children who want to have children are also anxious about returning to work afterwards. More than half of female respondents not working indicated they experienced isolation when on a career break. This need for support intensifies when women have their second child – 89% agree that developing a career after having a second child (or further children) is very difficult. A further 93% tell us it is hard combining a successful career with caring/ childcare responsibilities. Two in five working mothers take the lead role in childcare with some support from their partner or others.



Women aged 28-40: views on being a working parent or carer



1 in 5 mothers left because their childcare costs were too high:

"I left my last company after I returned from maternity leave as the hours they expected me to work made it impossible to balance my home and work life. I would have never seen my child. Employers need to learn that the job you do can be done in 20 or 30 hours a week and you don't have to work 50+ hours a week to be a dedicated employee. Job-sharing etc makes this possible and there is no reason they can't have part times cover roles".

Survey respondent

Women considering parenthood are right to be concerned. One in five female respondents said their employer is not supportive of working mothers, while a further 18% say the same about their colleagues. Two in three female non-parents told us they feel women with no children are expected to work longer hours than those with children, compared to 40% of mothers.

Two of the six personas demonstrate how this impacts on different types of women:

Ambitious and anxious

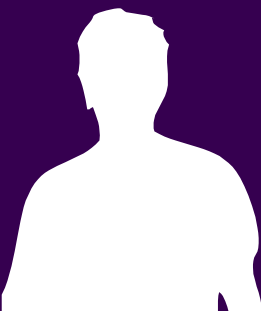


Works full time, single or has no children. Ambitious and able but finds it difficult to climb the career ladder. Not sure if she wants the senior lifestyle.

“Literally it’s almost everything I think about all the time... that I am likely going to have to take a break at some point so I’m conscious I need to reach a particular level before that happens”.

Focus group respondent

Career on hold for now



Flexible worker, but has put career on hold until children are older. May feel under valued.

“I just keep telling myself I am on pause, I haven’t stopped”.

Survey respondent

“We take the view that every single one of our lawyers has been the recipient of a massive amount of investment, whether that is paying their course fees or training over the years. It is just ludicrous not to support them when they come back. We would only have to then go out to a head-hunter and pay a fee to replace them, it is these mothers we are really looking for to progress and become the partners of the future”.

Colin Passmore, Managing Partner, Simmons & Simmons

Flexible working helps work-life balance but is it a career hindrance?

Flexible working is helping with work-life balance but is stigmatised in practice and works against career progression. As a term, 'flexible working' has lost some of its original meaning in organisational contexts, is often seen as a 'mummy track', and as a provision for working mothers alone. Flexible working for the purposes of the survey was defined as flexibility in contracted hours – such as term time working, part time working, job sharing, compressed hours, and so on. However, organisations need to encourage more flexibility around how, when and where employees work.

A more agile approach to work benefits the organisation as well as employees. Globalisation and technology means that talent can be sourced anywhere and put into

virtual teams. New approaches are needed to align the workplace with today's multi-generational worker. Organisations wanting to attract and retain the best talent need to understand what people want at different stages of their life. Moreover, prospective and current employees expect this. One woman's career can have periods of relative inflexibility alongside periods of reduced hours, often following starting of a family or caring for a relative. Agile work patterns would be good for men's engagement and effectiveness as well as women, and encouraging all employees to maximise their agility would help tackle stigma.

The good news – flexible working helps work-life balance

Flexible working in all its forms is considerably more prevalent than a decade ago, thanks in part to legislation as well as

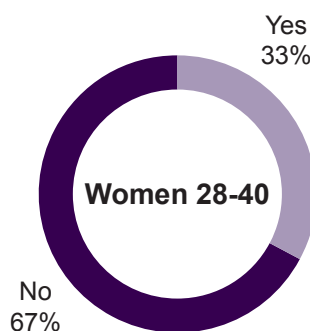
interest from organisations keen to adopt more agile working practices for the benefit of core business, their employees and the environment. Women are still more than twice as likely to be working flexibly compared with their male colleagues, but flexible working is increasing among men too. Encouragingly, the majority of both men (69%) and women (74%) agree that flexible working has enabled them to achieve the balance they want between career and life outside work. Flexible working is not only restricted to parents; one in ten female respondents who do not have children use some form of flexible working.

When we asked women and men to rank employee support programmes that have had an impact on their career progression, both women and men valued home-based working and flexible working within their top seven employee support programmes.

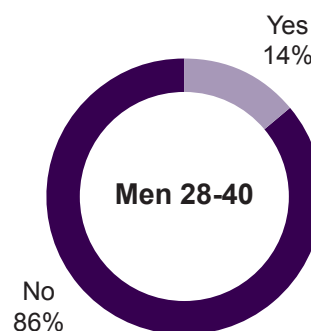
“(Flexible working) allows you to work on your own terms, not feel chained to the desk, and fit work around other things that are important to you, as long as you can achieve the end goal and get the work done”.

Survey respondent

Respondents aged 28-40: do you work flexibly?



Base: 13,329



Base: 906

“Equality of opportunity for ALL and not just those who are either able to work excessively long hours (there is a culture of presenteeism) or those who have not had a career break/family/alternative working arrangements for other reasons”.

Survey respondent

“Work more with managers to ensure that they understand the value of diversity/inclusion and are behaving accordingly...flexible working is up and running successfully across my team but I know that other managers in the organisation block their subordinates from working more flexibly either formally or informally”.

Survey respondent

The bad news – the reality for flexible workers

Two thirds of women agreed that in their organisation flexible working still means working long hours. Flexible workers will often work longer than their contracted hours to display commitment and get the job done, despite being regarded as less committed on account of their flexible work arrangements. Since women are

more than twice as likely to work flexibly as their male colleagues, they are disproportionately affected. Almost half of women respondents agreed with the statement: ‘in my experience people who work flexibly are resented by their colleagues’, a perceived tension between flexible workers and non-flexible workers.

Only 40% of respondents said their organisation values flexible working as a way of working efficiently.

Over a quarter agreed that their organisation’s evaluation process values hours worked more than results achieved. This all indicates a strong culture of presenteeism. Our findings suggest flexible workers are not being valued for their contribution and this is having an obvious impact on their progression.

“Traditional organisation structures with conventional management don’t understand the complexity of modern female lives”.

Survey respondent

“I think the importance of supporting flexible working has to be campaigned for. We require a cultural shift that working flexibly also equates to working effectively and should not be any indication of lower interest in career development”.

Survey respondent

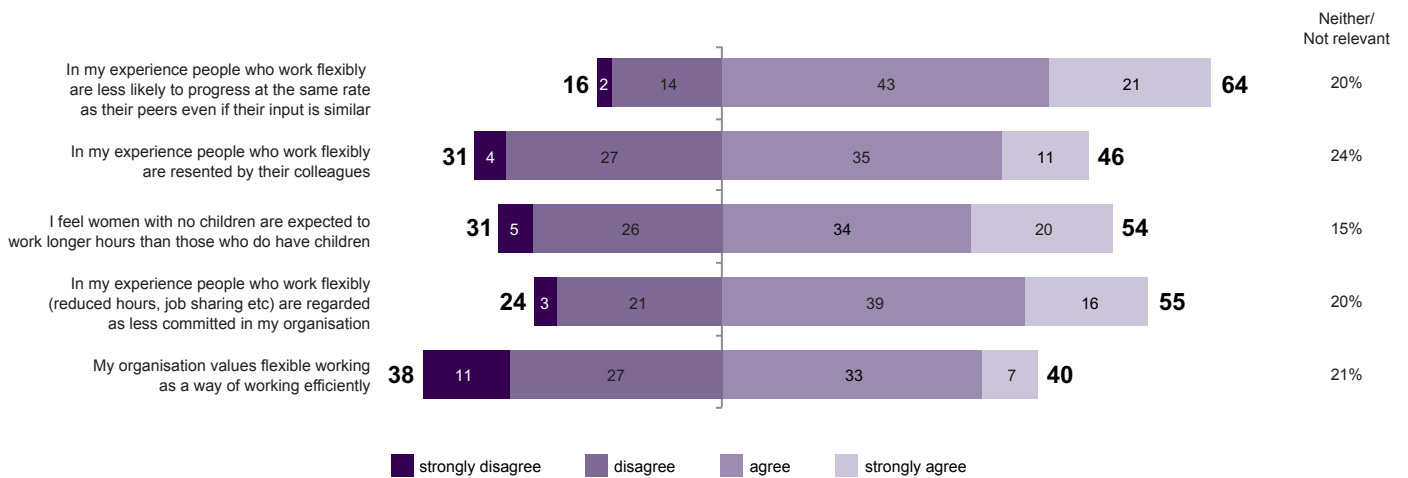
Work-life balance is important to women, so the stigma attached to flexible workers partially explains the lack of progression for women working flexibly and the nervousness of women who want to work flexibly in the future. Two thirds of female respondents believed work has

to be their number one priority in order to advance in their career and less than half believed they could develop their career alongside other interests/commitments.

Despite the perceived stigma and the potential to limit their careers,

women still value flexible working. Organisations need to tackle this stigma to get the best out of all of their talent. Organisations also need to review their approach to flexible working and become more agile in their approach to women’s and men’s working patterns.

Women aged 28-40: views on working flexibly



“We had to change our mind-set to value her capabilities more than the number of hours she could spend in the office. Capabilities are really what’s important. She can do that job in nine days, because she is very talented. That is an example of what we have to encourage and accept that people can do a job well to a flexible agreement”.

Paul Morris, MD Towers Watson

Focus on life outside work



Flexible or full-time worker, has children, not interested in progression. Main focus is life outside work.

“(I would like) an improved attitude, appreciation and recognition of women’s skills who work part time. There is a sense that if you’re working part time, a woman and a parent you’re not totally focused on your role. A more positive attitude that these are people who are amazing at juggling their life and their children’s lives, plus still managing to move things forward with massive pressures on them is a key strength that seems to be missed”.

Survey respondent

Senior leadership, real role models

Women and men see senior roles as highly stressful with long working hours. Female respondents were more likely to be put off senior roles than men, citing among key obstacles a lack of work-life balance at senior levels and a lack of 'real' role models.

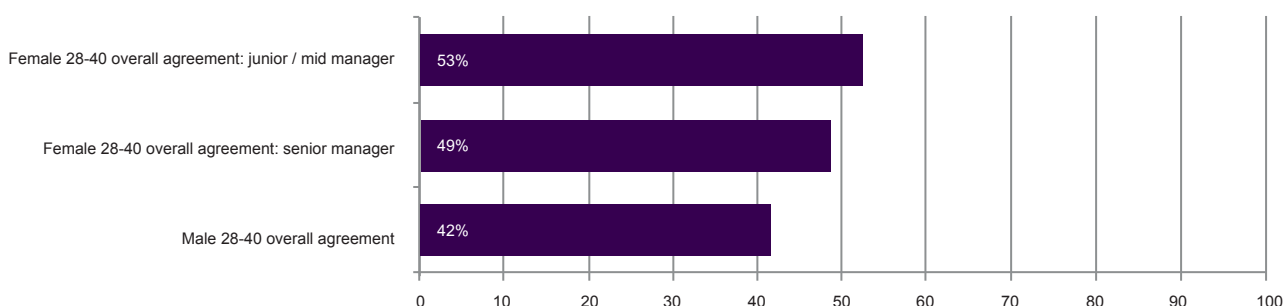
Senior life is off-putting

Working women are ambitious, but are pessimistic, and more pessimistic than men, about what a senior job involves. Long hours and high stress levels are not seen as attractive.

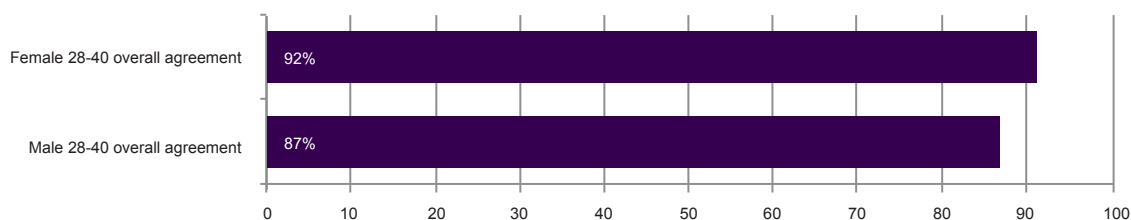
Most working women want to continue developing their careers but are pessimistic about what it

takes to reach the top. 92% of female respondents feel most senior roles involve high pressure, high levels of stress and long hours, as do 87% of men aged 28-40. Furthermore, half of senior (49%) and junior/mid management women (53%) told us they do not want the lifestyle of senior people in their organisation compared with 42% of men aged 28-40 overall.

I don't want the lifestyle of the senior people in my organisation



Most senior roles involve high pressure, long hours and high levels of stress



Our findings show that senior women are more likely to have a partner, or someone else, with the flexibility to make a contribution to home life and any childcare responsibilities. There is hope, as nearly half of female respondents at junior / mid level indicated their partner has 'some flexibility'. Increasingly, both partners need to have the agility they need to take responsibility at work and at home.

"The more senior you are the more you can manage your time anyway, but there are things I can't change – I get enough flexibility to be with the kids but it's not always easy. You have to deal with it, I have less flexibility than I want but I have some. There is no perfect work life balance at this level".

Ruby McGregor-Smith, CEO, Mitie

False perception?

Despite perceptions that senior women only seem interested in their careers, our findings show women directors are more likely to work flexibly (40%) than women from other levels and are more likely to say it has enabled them to achieve a satisfactory work-life balance (35% compared to 29% for junior/mid level). These findings suggest senior women have more autonomy once they are in senior roles, and agile working has enabled them to ‘have the best of both worlds’.

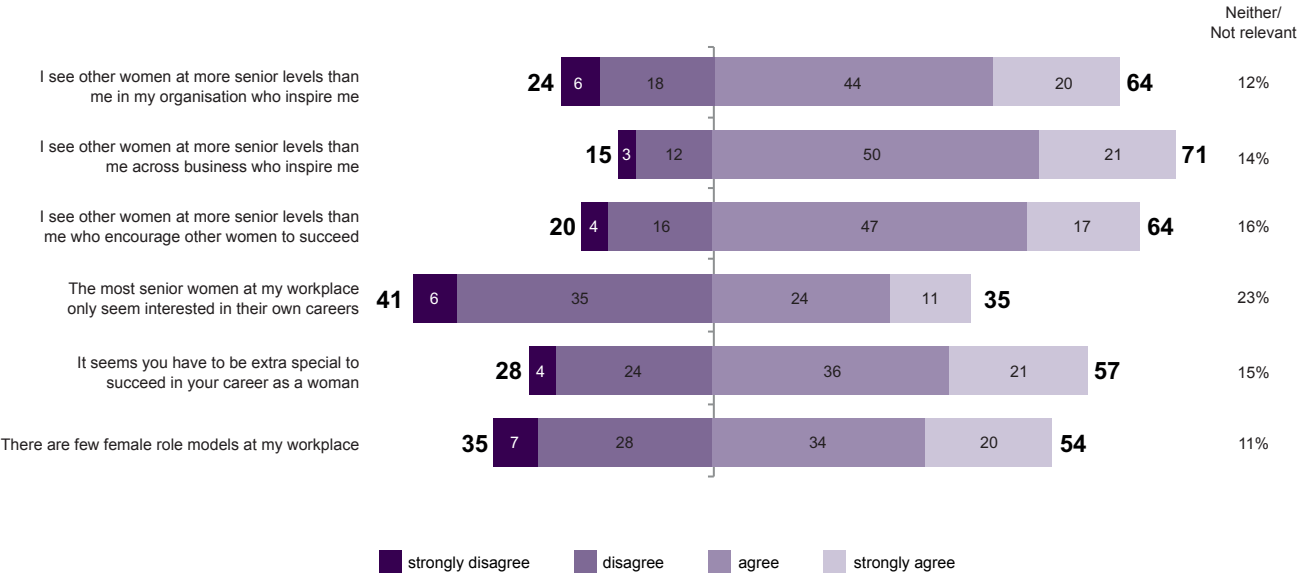
Women are telling us in the survey and focus groups they would benefit from both senior level women and men, as well as role models at all levels, talking about their professional achievements, as well as how they balance work and family commitments.

Role models – superwomen vs ‘real’ women

The lack of women role models in senior jobs compounds the inaccurate, negative perceptions of life at the top.

Over half of respondents agreed that there are few female role models at their workplace and 57% agreed that you have to be extra special to succeed in your career as a woman. Four in five female respondents agreed that the senior women in organisations are portrayed as ‘superwomen’ in the media, making it tougher for women to imagine themselves in those roles.

Women aged 28-40: views on role models in the workplace



“I think we are going to be in a war for talent in the next two years. An individual who has two job offers, one more flexible and accommodating with their work-life balance than the other, is going to take the more flexible job, so I think the issue will be forced open. If you want the best talent – whether its women or men or minorities or people with a disability or any group – we are going to have to be more accommodating”.

Paul Morris, MD Towers Watson

“Be realistic about the ‘having it all’ idea and say actually you can have it all but at a level that is different depending on your life choices as to whether or not you are a parent, a carer, single, have a partner (your partners work/ ambition plays into this) and endless other factors that affect our lives”.

Survey respondent

Line managers should hold regular conversations with team members, regardless of gender, to understand their priorities and aspirations and how they, as a manager, can support them. Women too need to be proactive in informing managers of other priorities and identifying solutions that suit the team, the organisation, as well as their own work-life balance.

Light at the end of the tunnel

We are making progress. Nine out of ten working mothers agreed with the statement ‘being a working mum makes me a good role model, provides balance in my life and helps me provide a good life for my children’. Nearly three quarters of female respondents felt that women have a lot of choices about their

lives today. 85% agreed that better gender balance at senior levels would send a strong signal that it is normal to strive for career success if you are a woman.

“We need more people to talk openly about the challenges they face in combining life with a career, but its important to remember that all women are role models, women from all levels not just the CEOs and Board women. And all business should promote these role models, everyone is a role model for someone! That’s why we [Mitie] make sure that for one day a year our managers go and speak in schools about their career and what they do and about who they are, what’s important to them”.

Ruby McGregor-Smith, CEO, Mitie

Section Three: Reality check

Organisations have not kept pace with significant shifts in employees' priorities and aspirations, with the result that workplaces are not conducive to meeting employees' needs and expectations while organisations do not get the most out of employees' talent. This is especially true for female employees: findings from Project 28-40 emphatically show that workplaces are not working for women.

Two key measures show how skewed and distorted this misalignment has become. The first is the gap between women's and men's perceptions of opportunities for career development. The second is the gap between the workplace envisaged in organisational policies and the reality of those workplaces as experienced by women, including the stories respondents told us about bullying and harassment.

Perceptions gap

There is still a considerable gap between women's and men's perceptions about opportunities for career development and the extent to which workplaces are enabling and supportive of women's career aspirations. The issue is equality of opportunity: women do not think

career development opportunities are fairly distributed or equally accessible, they perceive workplace cultures as male-dominated, and they are more pessimistic about their chances of getting ahead.

- Asked whether opportunities to advance were fair and equal between men and women, less than half of female respondents agreed, 28% less than male respondents. Women were twice as likely as men to disagree.
- Asked whether women find it hard to network with the most senior staff, women were five times more likely than men to agree. Whereas women were evenly split on this question, men were nearly nine times more likely to disagree than agree.

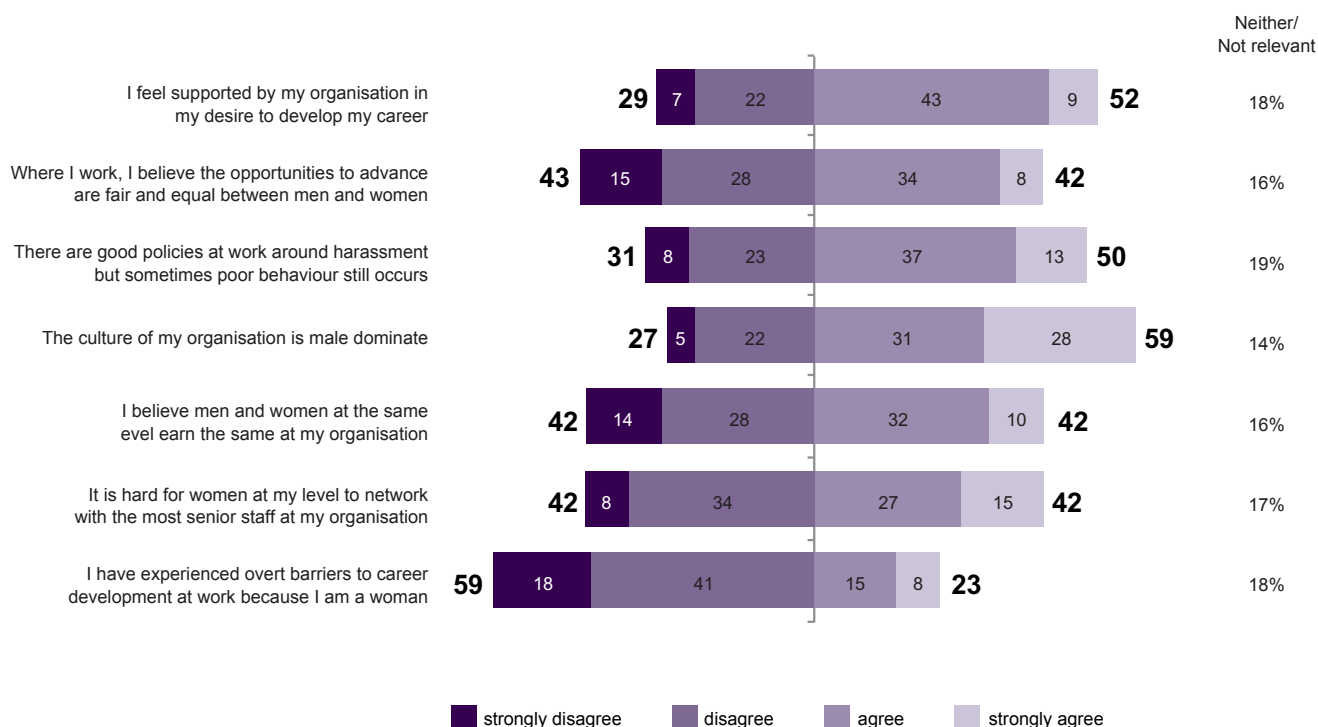
- Less than half of female respondents were confident that women and men at the same level earned the same in their organisation, compared with three quarters of male respondents.
- Most female respondents thought the culture of their organisation was male-dominated, compared with just over a third of male respondents. Half of male respondents disagreed, compared with only a quarter of female respondents.

Men do not see the barriers to women's progression that are clear to women themselves. To make progress on fairness at work, that has to change.

"Some of the structures are in place that supports career development for women with children, however how being a woman with children working in the organisation can vary hugely...The cost of childcare almost completely wipes out my salary, but I am prepared to make this investment in my career. However, there are too many senior members of the organisation who have wives who do not work and have not worked since they had children. Very few of these men show any evidence of comprehending the amount of responsibility that many working mothers are taking on".

Survey respondent

Women aged 28-40: views on career development opportunities



Policies gap

Workplace policies are failing to create safe and enabling workplaces for women, despite proliferations of guidance and good practice. One in four female respondents think women in their organisation are treated unfairly. They are three times more likely to think so than their male colleagues. Nearly a third disagreed that there are good policies around harassment at work. Only half agreed.

Flexible work policies are intended to enable employees, usually women, to better manage their hours and

workloads. Still, two thirds of female respondents agreed that in their organisation working flexibly still means working long hours. Only one in five disagreed. Less than a third of female respondents agreed that opportunities to advance in their career were fair and equal between women who have children and women who do not. Nearly half disagreed.

The most striking illustration of the gap between organisations' policies and employees' experiences is bullying and harassment. Shockingly, more than half of female

respondents said they experienced some form of bullying or harassment in their workplace in the previous three years. A further 12% experienced sexual harassment. More than one in four experienced overbearing supervision or misuse of authority, or felt undermined by being deliberately overloaded with work and constant criticism. More than one in six experienced exclusion and victimisation or experienced being prevented from progressing by intentionally blocking promotion or training opportunities.

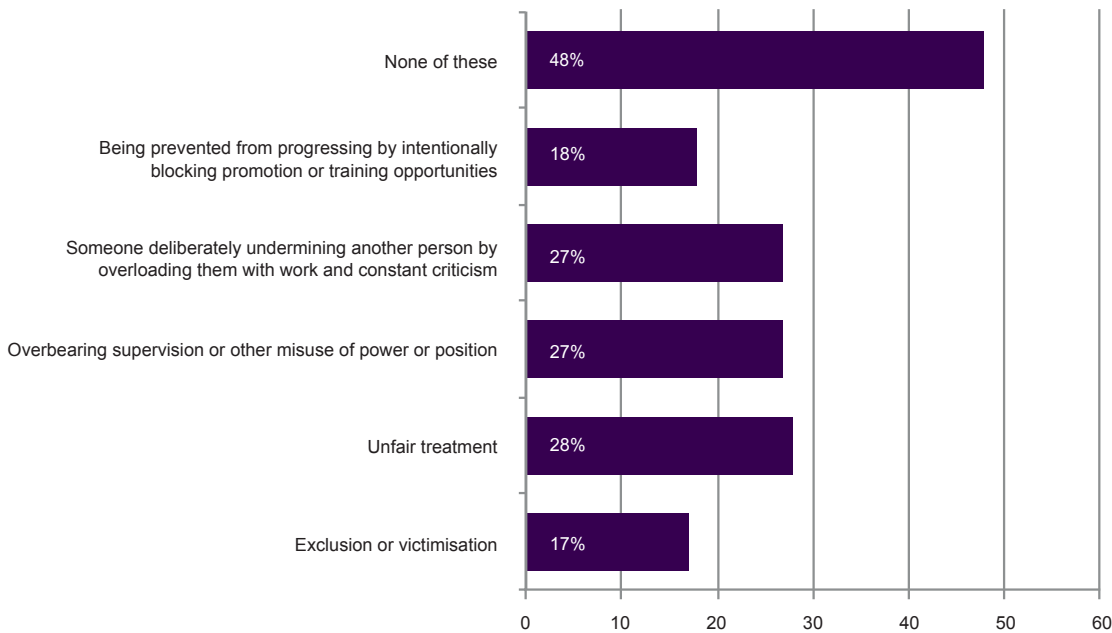
"I was one of the most senior women in the organisation but went off sick when my attempts to deal with a culture of bullying resulted in sidelining and bullying of myself and my team, and the chief exec siding with the bullies".

Survey respondent

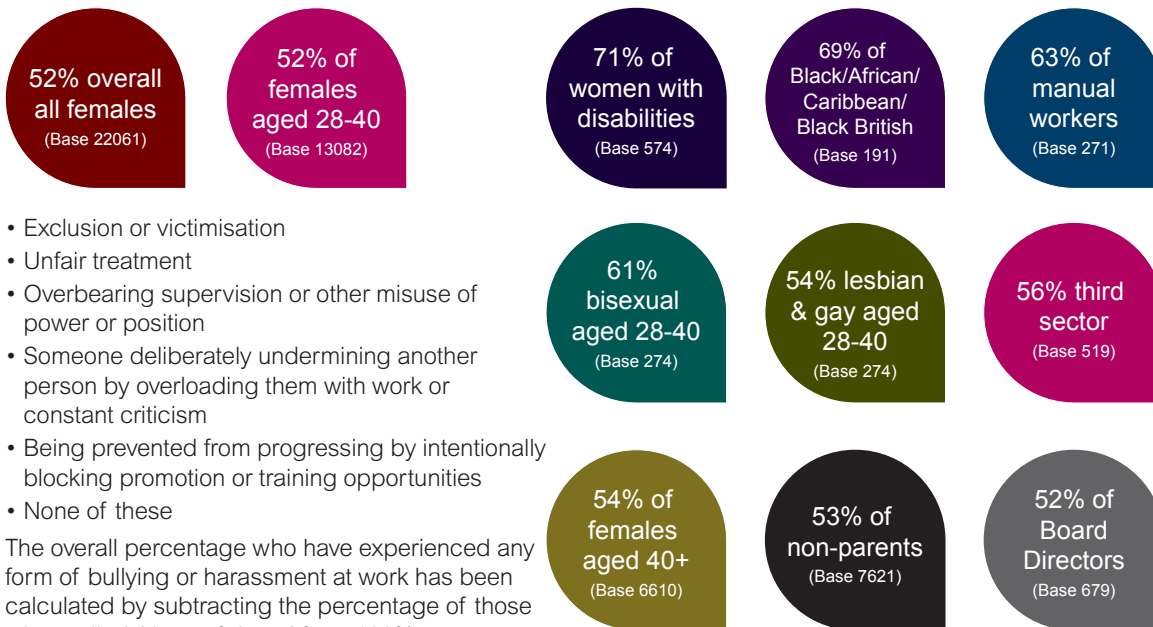
"Senior males in my office are known for going after the younger women, it's a joke, goes on too much for that to be acceptable".

Male focus group respondent

Women aged 28-40: bullying and harassment, not including sexual harassment



All women: who is more likely to have experienced bullying and harassment, not including sexual harassment?



Base: All females

"I don't feel bullied but I do feel I am treated differently... male clients will talk to the leading male automatically regardless if I am the actual lead on the job.... Another one [client] just assumes I'm the PA ...he always asks for a male colleague first".

Focus Group respondent

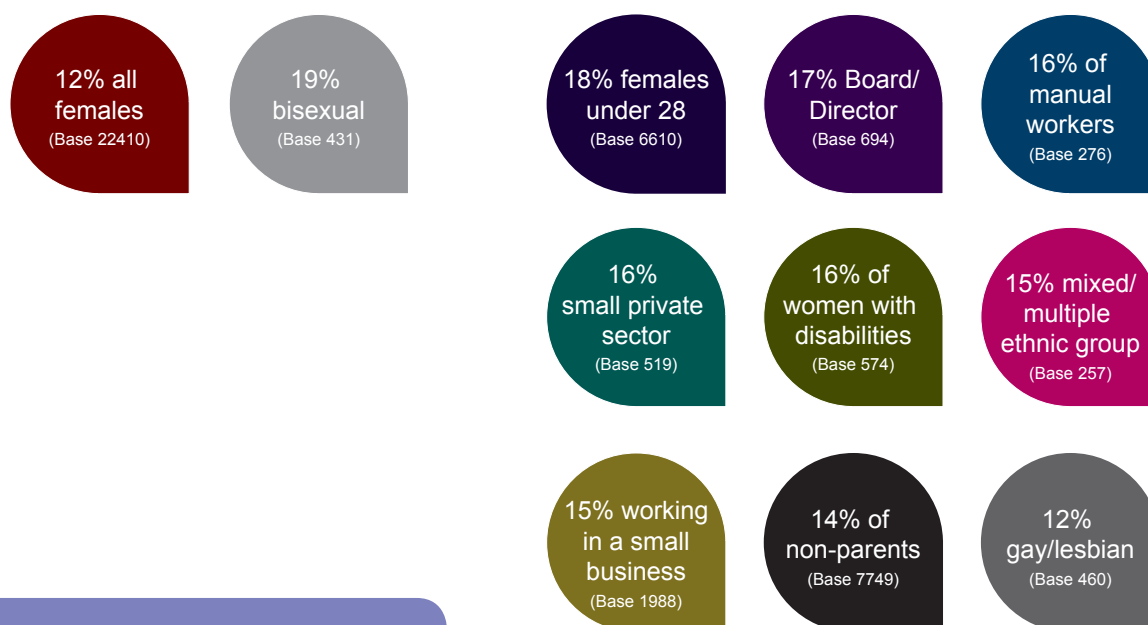
The figures are still more disturbing when disaggregated for women's diversity. Among the 52% of women who have experienced workplace bullying and harassment during the previous three years, the rates were highest for Black British / African / Caribbean women (69%), women with disabilities (71%), bisexual

(61%) and lesbian and gay women (55%).

These bullying and harassment figures exclude sexual harassment, which we asked about separately. Among female respondents, 12% said they had experienced sexual harassment in the workplace during

the previous three years.¹ Again, LGBT women, ethnic minority women and women with disabilities were more frequently targets of sexual harassment. Non-parents were more likely than parents to have experienced bullying and harassment.

All women: sexual harassment



Base: All females

"I am horrified actually but I think there are a number of things we can do about it: Zero tolerance, you have to take decisive action. You have to make examples (of people) you really do and I have no fear at all of doing that!"

Debbie White, CEO, Sodexo

"Bullying will always happen – but there needs to be an effective and open way of dealing with it. In mishandling what happened to me, so badly, the organisation completely destroyed my faith in it and any belief I had that such a situation would not happen, again".

Survey respondent

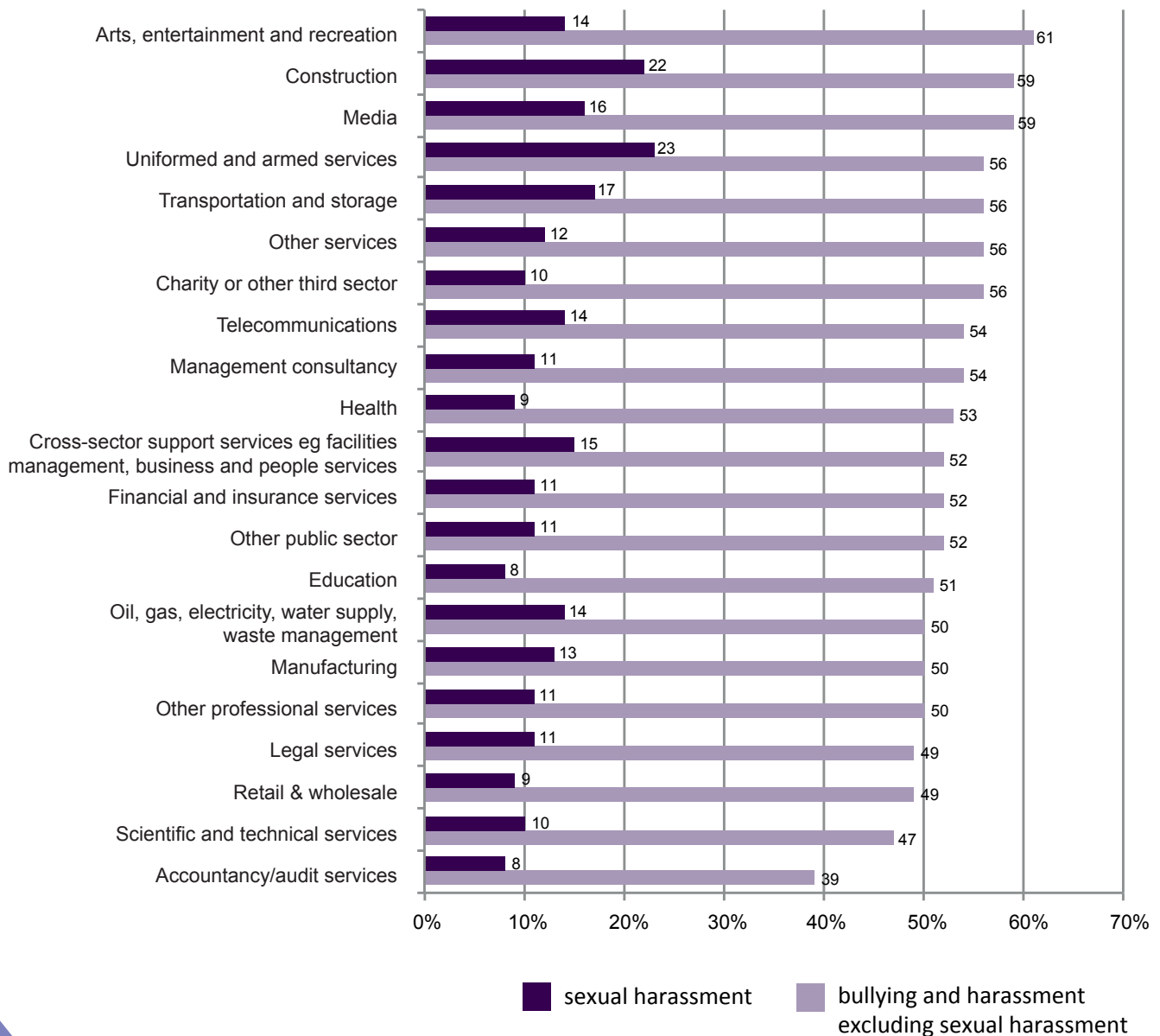
Although targeted groups were roughly similar for respondents to both the sexual harassment question and bullying and harassment excluding sexual element, the picture was more mixed when disaggregated by sector. Women in sectors that typically employed

more men experienced sexual harassment more frequently and above the 12% average – sometimes substantially so. By contrast, female respondents experiencing bullying and harassment excluding sexual harassment were more evenly spread across different sectors.

Women often experience bullying by female colleagues and line managers, a point echoed by focus groups participants who thought female bullies felt threatened by potential and ability and so exploited their position or authority to undermine.

¹ We defined sexual harassment as unwelcome comments of a sexual nature, unwanted physical contact or leering, asking for sexual favours, displaying offensive material such as posters, or sending offensive emails or texts of a sexual nature.

Women aged 28-40: bullying and harassment by sector



“It’s a challenging area definitely, it’s important to have a very open culture where these things can be discussed and addressed. But this is difficult when you have a very large organisation, as a leader or CEO you can’t be everywhere all the time. You have to rely on your line managers in a large organisation to ensure this is not going on and that you have an open culture which encourages reporting. Reporting is so important, we must ensure this is happening, in an open way so we can address problems when they arise”.

Ruby McGregor-Smith, CEO, Mitie

The overall picture should galvanise organisations into action. Indeed, only half of female respondents agreed that their workplaces have good policies around harassment. Nearly a third disagreed. When we asked participants an open ended, unprompted question about what their organisation could do or could have done to improve the culture in their workplace, addressing bullying and harassment was the most frequent suggestion: one in six women recommended it.

Read together, these gaps indicate the extent to which workplaces are not working for women. They are consequences of organisations' failure to keep pace with employees' changing priorities, aspirations, and expectations, and indicate fundamental challenges if workplaces are to work better for all employees, especially women. More significantly, however, these gaps are also measures of the dysfunctional, inefficient and fundamentally unjust ways workplaces do work. As such they also indicate key constraints that

impede organisations' capacities for creating more engaging, stimulating, and rewarding workplaces, especially for women. In other words, organisations that struggle to close these gaps between policies, perceptions and realities will have a much more difficult time responding to the three key challenges outlined in Section 2: reducing work-life conflicts; gaining widespread acceptance of flexible working models; and developing role models whose experiences and behaviours connect with female employees.

How can business address the fact men seem less aware of the barriers women face?

"The problem is that businesses are not addressing it. We need more inclusive leadership – it's important to understand how people work and what motivates them. Managing a diverse group of people is challenging but there are ways to equip managers through training and involvement in discussion groups".

Inga Beale, CEO, Lloyds of London

"There is an 'automatic protectionism' amongst senior men, and that's why we need to push diverse people to challenge the status quo. At the moment we have guys protecting each other, it's a club, they will look out for each other and if something goes wrong they will defend each other, they don't want to rock the boat. Women traditionally have not had that network of support that men tend to have, so in that sense they have nothing to lose by rocking the boat and challenging the way things are.

Do you see yourself in this role? Yes I do, I see myself as a challenger, I am generally quite outspoken and candid!"

Inga Beale, CEO, Lloyds of London

Section Four: Get the basics right

Organisations need to get the basics right. Women want better management of their talent and stronger support for their career development. Regular, fair and transparent performance reviews, clear definition of roles, better role-models, along with mentoring and coaching opportunities all featured strongly in Project 28-40 survey responses. To this extent, women are no different to men. However, we have already seen that women and men experience workplace policies and realities very differently. Line managers therefore play a crucial role in organisations' capacities for responding to the challenge of ensuring workplaces work for women.

Women are actively seeking training and development opportunities – three in four female respondents said so. When we asked them to rank their preferred employee support initiatives in order of importance, objective-setting and performance appraisals along with clear role definition were their priorities. Respondents tell us that organisations are not getting this right. Asked an open ended question about what they would like their organisation to introduce to improve career development opportunities,

fair and transparent promotion and appraisal processes topped the list. The implication is that a significant portion of women in work – 22% of female respondents – feel they would benefit but are not offered this most basic of good talent management practices.

Similarly, women ranked technology-supported home-based working third on their list and 13% of female respondents to our open ended question mentioned better agile working arrangements as a career-

enabling opportunity they would like introduced in their workplace. These organisations and their employees are seeing benefits, especially where flexible working arrangements are not reserved for women with children, and instead are open to both women and men regardless of parental or other caring responsibilities. Role suitability should be the most important criterion for determining who can work flexibly and the parameters of flexibility.

“More transparency about what is expected of someone in my role, support and guidance about how to proceed to the next level, etc”.

Survey respondent

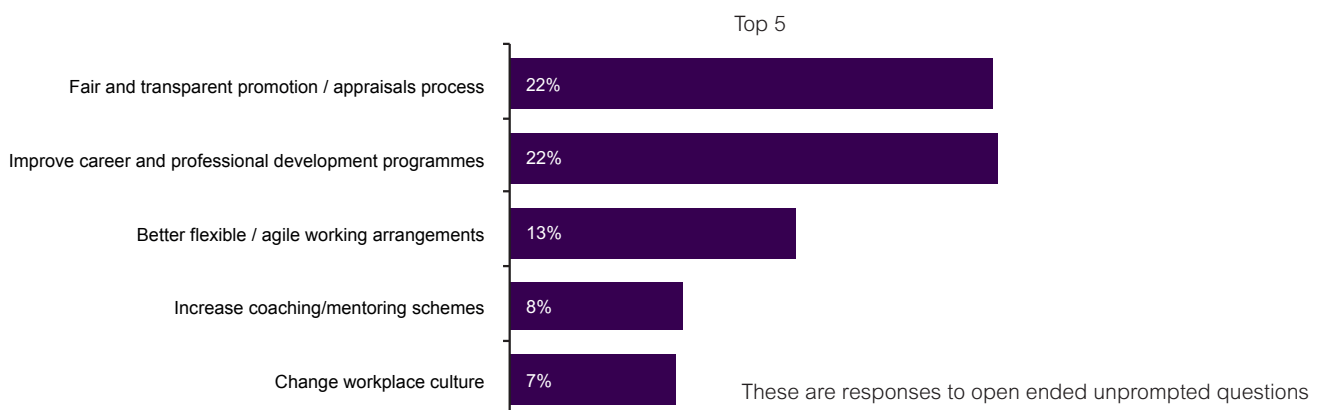
“Organisations need to support and encourage women employees to look at progressing in their current role. No job I have ever done has given me any guidance on how to progress to the next level”.

Survey respondent

Respondents aged 28-40: employee support programmes ranked by importance

Statements	Female 28-40	Male 28-40
Regular and transparent performance review, objective setting and appraisal processes	1	1
Clear definition of roles/levels to help you understand what is expected at the next level, ... for promotion	2	2
Home based working supported by technology	3	5
Core competency/skills assessment to help you understand your strengths and development areas	4	3
Mentoring, sponsorship and coaching programmes focused on career progression	5	4
Flexible working programmes (e.g. part time working, term time working, reduced days per year etc)	6	7
Subsidised childcare e.g. childcare vouchers	7	8
Access to enhanced maternity programmes, beyond the statutory minimum	8	10
Access to networking opportunities with more senior staff	9	6
Keeping in touch programmes to keep you linked in during maternity leave	10	12
Job sharing opportunities	11	9
Return to work programmes to support you after a career break	12	11

Women aged 28-40: the one thing my organisation can do to improve career development opportunities



“Clear support from line management regarding objectives, PDP and career path and allowing me to take secondments and provide necessary guidance so that I can maximise my potential”.

Survey respondent

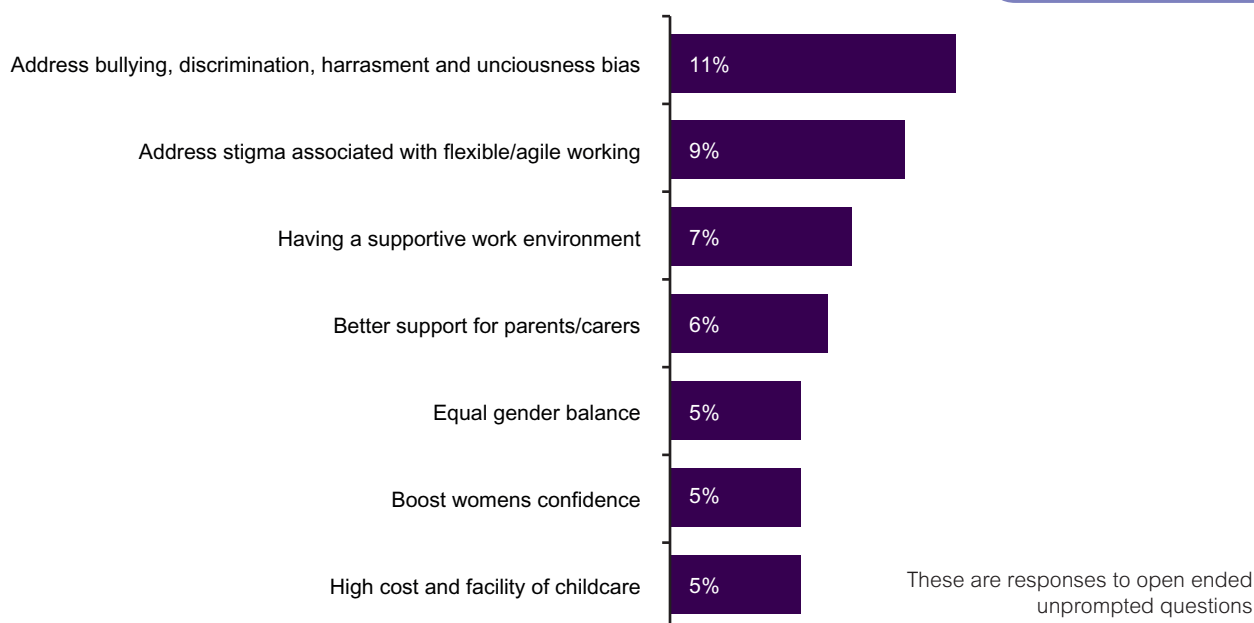
Respondents also felt employers are not getting the basics right for parents. Although a majority agreed that their employer is supportive of working mothers, still one in five disagreed. The concluding question of the survey asked participants whether they had any further comments about how to accelerate

progress for women in their careers. It is telling that support for parents and carers, high cost and facility of childcare, post-maternity return-to-work programmes, as well as wider acceptance of men's role in childcare and parental leave were all among the most frequently mentioned suggestions.

“Talented women need support from their organisation in making their talent and success visible beyond the immediate line manager. The organisation needs to proactively push and stretch women”.

Survey respondent

Women aged 28-40: further comments



Line managers

The strong message coming from Project 28-40 respondents is that they want more support from their line managers. A recurring theme in focus groups and open-ended survey responses was appraisals and performance reviews and the role of line managers in ensuring these were in place and were effective. Women repeatedly said these should be available to all staff, and should be focussed on career development and progression rather than simply targets or objectives related to specific work programmes. Women wanted more transparency around appraisals, coupled with clarity and specific details about decision-making criteria and progression processes. Women wanted to see different kinds of appraisals to supplement the traditional annual performance review, suggesting project-

based, one-to-one, or continuous assessments as examples. More generally, women felt it was incumbent on line managers to actively seek opportunities to develop their teams.

Women also wanted to see more support for their line managers. They wanted to see line managers trained in how to manage teams with diverse needs and aspirations, how to conduct performance appraisals, and ensure they are having regular conversations with them about their job satisfaction and career development. They wanted line managers to be better people managers and better able to recognise when team members' needs and aspirations are changing. These women felt better manager training would help improve consistency, accountability and counter the problem of the 'accidental manager' who develops

authority and influence as they progress in their career but not the skills to use it in ways that are most beneficial for their team, themselves and the organisation. Conversely, female respondents gave us countless examples of line managers whose managerial limitations were severely detrimental not only to the women they managed, but to the organisations they worked for. The findings presented in Section Three, particularly regarding bullying and harassment, illustrate this point.

Managers are the front line in organisations' engagement with their employees. They are a lynchpin for organisations committed to narrowing the gap between policy and reality, ensuring equality of opportunity for all their employees, and effectively responding to the key challenges emerging from Project 28-40.

Recommendations

- **If you are serious about change, you as CEOs and senior leaders need to take the lead on women's progression, moving this from a diversity initiative to a core business priority. Set aspirational targets for the numbers of women you want to see at each level in your organisation.**
- **Set aspirational targets for the numbers of women you want to see at each level in your organisation.**
- **Prioritise the development of excellent managers at every level of your organisation.**
- **Create a truly agile organisation, with women and men able to work in a way that makes them productive and engaged. Look at job design, technology, agile teams, and defeat the flexible working stigma that holds women back. Allow for non-linear careers – your top talent will have times in their lives they need to take a step back.**
- **Recognise that harassment and bullying still occur, despite well-meaning policies. Call it out, deal with perpetrators, and make it simple and straightforward to report.**
- **28-40 women: Build your network – be in a position to know about opportunities as they come up. Get real on sponsorship – identify senior people who will advocate for you. If you want a mentor, ask them.**

Detailed recommendations and guidance on how to tackle the issues raised in this report are available to Opportunity Now members online.

About Opportunity Now

Opportunity Now is the campaign on gender diversity from Business in the Community. Opportunity Now aims to increase women's success at work, because it's not only good for business but good for society too. Opportunity Now empowers employers to accelerate change for women in the workplace. We work

with our membership of employers, from private, public and education sectors to offer tailored, practical and pragmatic advice on workplace issues.

Founded in 1991, the original aim of Opportunity Now was to maximise the potential of female employees

and improve their recruitment and retention prior to the start of the new millennium. Over 20 years on the need for the work of Opportunity Now is just as strong.

www.opportunitynow.bitc.org.uk

Methodology

The intention of this project was to listen to what women aged 28-40. With this in mind, an online survey was designed to elicit women's actual experiences of work – including women who have left the workplace, whether they are planning to return or not. As well as women aged 28-40, we targeted women under 28, women over 40 and men in order to provide control groups against which we could compare and contrast attitudes and experiences and test the validity of the findings. Where critical differences occurred between groups, these have been highlighted in the research report.

The research included focus groups to further tease out early survey findings and gather further insight. Interviews with senior business leaders were also conducted to elicit views on early findings and suggested recommendations for business.

The combination of methods allowed for results to be triangulated to maximise the reliability and validity of the research findings.

The questionnaire

The questionnaire was designed by Opportunity Now and PwC's research and insight team (r2i), with support from the Project Steering Group. The survey was organised into the following thematic areas, determined from a literature review as key themes emerging from previous research:

- Attraction and ambition of women
- The importance of career development opportunities and support
- Reality of workplace culture and barriers
- Role models in the workplace
- Leaving: why and where do they go?

The questionnaire was piloted across a range of organisations including Talking Talent, PwC and other Opportunity Now contacts, to provide initial feedback on the questions. The online survey was hosted by PwC and Opportunity Now and the weblink distributed by email and social media in the following ways.

- Opportunity Now members
- BITC members
- Opportunity Now external stakeholders
- Opportunity Now social media, website and Member Bulletin
- BITC social media, website and member newsletter
- National Press

Using a snowball sampling method, initial contact with women in the 28-40 age group from the above sources lead to distribution of the survey link to more women in the target age group. Opportunity Now members were encouraged to seek responses from men as well as women.

The survey launched on 15 November and closed on 17 December 2013. A total of 25,199 people responded to the survey, for the purposes of this report, analysis has been focused on women aged 28-40 with men aged 28-40 as a control group.

There is potential for 'self-selection bias' in the data, as this was a self-selecting survey targeting Opportunity Now and BITC member organisations for the sample.

The figures below reflect the margin of error of the survey data and should be taken into account when reading this report. The industry norm for market research is +/- 4%, thus the high response rate of approx 25,000 responses has provided a very narrow margin of error:

ALL respondents	+/-1%
ALL Female	+/-1%
ALL Male	+/-2%
Female 28-40	+/- 1%
Male 28-40	+/-3%

The survey responses to the questions were cross-analysed by different groups responding, including (but not limited to) the following characteristics:

- Gender
- Age
- Race
- Sector
- Parents/non-parents

Focus groups and interviews

PwC carried out ten focus groups in order to gather further insight on the themes emerging from the survey findings. In order to provide further comparability for the age group being tested in the survey (women aged 28-40) four of the focus groups were with those who are older or younger than the main target group:

- Women aged under 28 years
- Women aged over 40 years
- Men aged 28-40 years
- Men and women aged 28-40 years

Opportunity Now carried out 10 in depth interviews with CEOs/ Senior Directors from our member organisations to gather their insight and views on themes emerging from the survey. The themes to be tested by the focus groups and interviews were determined by Opportunity Now and PwC following analysis of the initial findings from the survey.

Analysis and write-up

At the outset of the project, Opportunity Now and PwC determined a set of hypotheses to test in the survey. PwC carried out the first stage of the quantitative analysis to uncover the emerging themes and provide 'headline' findings against the original hypotheses. These findings were used to determine the themes for the focus groups and interviews. PwC also conducted preliminary analysis of the 'open text' responses to the survey and the analysis of the focus group findings.

Opportunity Now authored the final report using the quantitative and qualitative data analysis from PwC. Post launch, there will be further detailed analysis of the quantitative and qualitative data by Opportunity Now and PwC.

Appendix

Employment status	
Employed full time	79%
Employed part time	16%
Self employed, employed in the past	3%
Unemployed, but been employed in last 3 years	2%

Organisational seniority	
Business owner/partner	3%
Board level	1%
Director level	4%
Senior management, professional or technical	14%
Mid-level management, professional or technical	37%
Junior level managerial, professional or technical	31%
Supervisor of manual workers	1%
Skilled manual worker	2%
Semi-skilled or unskilled manual worker	1%
Other	7%

Sexual orientation	
Bisexual	2%
Gay/lesbian	2%
Heterosexual/straight	91%
Other	0%
Prefer not to say	4%

Disability	
Do you consider yourself to have a long-standing limiting illness or disability that affects your daily life?	
Yes	7%
No	91%
Prefer not to say	1%

Ethnicity	
White: English/Welsh/Scottish/Northern Irish/British	77%
White: Irish	3%
White: Gypsy or Irish Traveller	0%
White: Other white	10%
Mixed/multiple ethnic groups: White and Black Caribbean	0%
Mixed/multiple ethnic groups: White and Black African	0%
Mixed/multiple ethnic groups: White and Asian	1%
Mixed/multiple ethnic groups: Other mixed	1%
Black/African/Caribbean/Black British: African	1%
Black/African/Caribbean/Black British: Caribbean	1%
Black/African/Caribbean/Black British: Other Black	0%
Asian/Asian British: Indian	2%
Asian/Asian British: Pakistani	0%
Asian/Asian British: Bangladeshi	0%
Asian/Asian British: Chinese	1%
Asian/Asian British : Other Asian	1%
Other ethnic group: Arab	0%
Other ethnic group: Any Other ethnic group	0%
Prefer not to say	2%

Sector	
Agriculture, forestry, fishing, mining, quarrying	0%
Oil, gas, electricity, water supply, waste management	5%
Manufacturing	3%
Construction	1%
Retail & wholesale	2%
Transportation and storage	1%
Hotels and catering services	0%
Telecommunications / Information Technology	3%
Financial and insurance services	20%
Real estate services	1%
Legal services	7%
Accountancy/audit services	5%
Management consultancy	3%
Other professional services	3%
Scientific and technical services	4%
Arts, entertainment and recreation	1%
Education	9%
Health	5%
Uniformed and armed services	4%
Other public sector	9%
Charity or other third sector	4%
Cross-sector support services eg facilities management, business and people services	2%
Other services	3%
Media	4%

Number of employees your employer has	
Less than 25	6%
26-50	2%
51-100	3%
101-250	4%
251-500	5%
501-1000	7%
1001-5000	21%
More than 5000	48%
Don't know	5%

Total number of females overall	22576
Total number of women aged 28-40	13388
Total number of men overall	2166
Total number of men aged 28-40	910

Not all figures add up to 100% due to rounding and/or the exclusion of 'neither/nor' and 'don't know' responses

Acknowledgements

To the 25199 people who completed the survey which took over 20 minutes to complete on average, thank you. Without you, none of this would be possible. We will make sure your voices are heard.

Thank you to our project steering group for leading this project and making something on this scale happen – Helena Morrissey, Suzanne Baxter, Evelyn Bourke, Tony Prestedge.

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Roland Aurich, Chief Executive, Siemens Plc

Inga Beale, CEO, Lloyds of London

Steve Holliday, CEO, National Grid

Ruby McGregor-Smith, CEO, Mitie

Simon Michaels, Managing Partner and Mark Sherfield, Managing Director, BDO

Paul Morris, Regional Leader – Europe, Middle East & Africa, Towers Watson

Colin Passmore, Senior Partner, Simmons & Simmons

Dave Webster, CEO, Natural England

Debbie White, CEO, Sodexo

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Awaiting appointment

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