

HEALTH WEALTH CAREER

2017 NAMIC-WICT DIVERSITY SURVEY EXECUTIVE SUMMARY



THE NAMIC AIM

In collaboration with **Mercer**

Underwritten by the **Walter Kaitz Foundation**



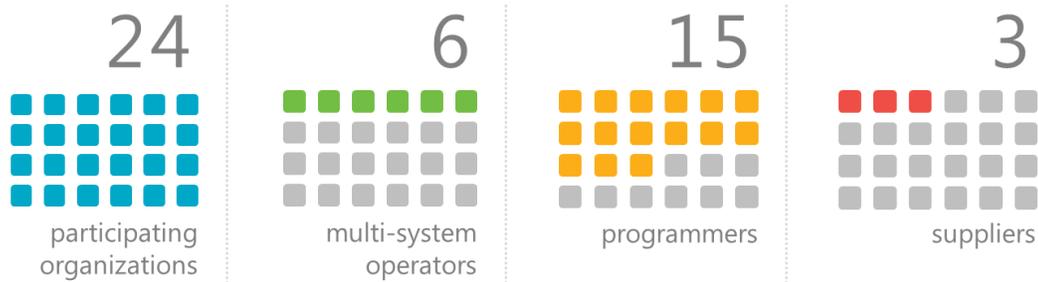
ABOUT THE SURVEY

The National Association for Multi-Ethnicity in Communications (NAMIC) and Women in Cable Telecommunications (WICT) once again teamed up to conduct the 2017 iteration of the NAMIC and WICT Industry Diversity Survey, a combination of NAMIC's AIM (Advancement Investment Measurement) survey and WICT's PAR (Pay Equity, Advancement Opportunities and Resources for Work/Life Integration) Initiative. The survey was conducted by Mercer as a third-party expert. The Walter Kaitz Foundation funded this project.

While the survey was conducted in 2017, survey respondents were asked to report on 2016 workforce demographics by gender and race/ethnicity for a variety of job categories. Therefore, much of the data included in this report are labeled as 2017 data. This is consistent with how the surveys have historically been conducted. The results in this executive summary reflect the most current data available.

SURVEY METHODOLOGY

The primary research methodology for this study was an online survey of cable and communications companies. The survey, which consisted of 51 quantitative and qualitative questions, launched in February 2017 and was open for eight weeks, with periodic reminders sent to non-respondents. Respondents comprised¹ the following:



281,000+ people employed by participating organizations in the U.S., out of roughly 417,000 total directly employed in the industry.

67.5% of the industry workforce covered by the survey, suggesting results are representative of the industry.

¹ Nineteen organizations participated in both the 2015 and 2017 NAMIC and WICT diversity surveys. Several organizations were new to the survey in 2017, and a few organizations that participated in 2015 did not participate in 2017. Mergers also impacted the numbers of companies represented in 2017 vs. 2015. Thus, changes in survey benchmarks between 2015 and 2017 may be due, in part, to different organizations participating in the two surveys. Seventy-one companies were invited to participate.

Similar to prior years, the 2017 survey covered the following:

Diversity at the highest leadership levels.

Industry-wide Internal Labor Market (ILM) maps showing the workforce dynamics—i.e., hires, promotions, and exits—of women and people of color in the industry. Each survey participant received Internal Labor Market (ILM) maps and projections reflecting their organization.

Diversity practices and commitment to diversity and inclusion.

Projections of how representation of women and people of color at management levels can be expected to change over the next ten years.

Selected employee benefits.

THE BUSINESS CASE FOR DIVERSITY

Historically, the rationale for organizational diversity and inclusion efforts focused on the legal and compliance justification, coupled with the moral imperative that “it’s the right thing to do.” More recently, however, the focus has shifted to the business case for diversity. The business case for diversity is clear. An extensive body of trusted research has demonstrated the value of a diverse and inclusive workforce. Catalyst recently reviewed the research on the connection between diversity and business outcomes, demonstrating that diversity—for example, women in leadership, board positions, or workforces; racial and ethnic diversity; and LGBT+ inclusion—is positively associated with important business outcomes.² Most notably, numerous research studies show that diversity is positively related to return on equity, financial performance and employee satisfaction, as well as innovation, creativity, and knowledge formation and patents. Mounting evidence suggests that organizations interested in improving their financial performance, better leveraging their talent, having a workforce that reflects the marketplace, and increasing innovation and group performance, need to make diversity and inclusion a priority.

² Catalyst. *Diversity Matters*, 2014, available at <http://www.catalyst.org/knowledge/diversity-matters>.

OVERVIEW

If there is one trademark of the American cable industry, it's that you can find its employees in virtually every community. For more than a decade, NAMIC and WICT have been measuring cable workforce demographics to help companies determine the factors that influence the industry's ability to recruit, retain and advance its people.

In 2017, the overall workforce of people of color increased from 39 percent to 40 percent, while the percentage of women remained constant at 34 percent. Executives at the senior ranks (senior level officials and managers) rose from 16 percent to 23 percent for people of color and 32 percent to 38 percent for women. As in previous years, Mercer studied the industry Internal Labor Market (ILM) maps to determine which factors significantly impact career trajectories. The 2017 data found that for women, closing the gap in employee retention remains central to achieving parity with men. For people of color, improving both retention and promotion rates is necessary to achieving parity with their white counterparts.

SURVEY HIGHLIGHTS³

People of Color⁴

- Representation of people of color in the industry has generally increased over the past two years. A look at the 19 organizations that participated in both the 2015 and 2017 surveys (i.e., "survey-over-survey" participants) shows that representation increased or remained flat across all levels. Operators saw increases at every level, while programmers saw mixed results.

Percentage Point (%pt) Change in People of Color Representation
Survey-over-survey participants only (2015, 2017)

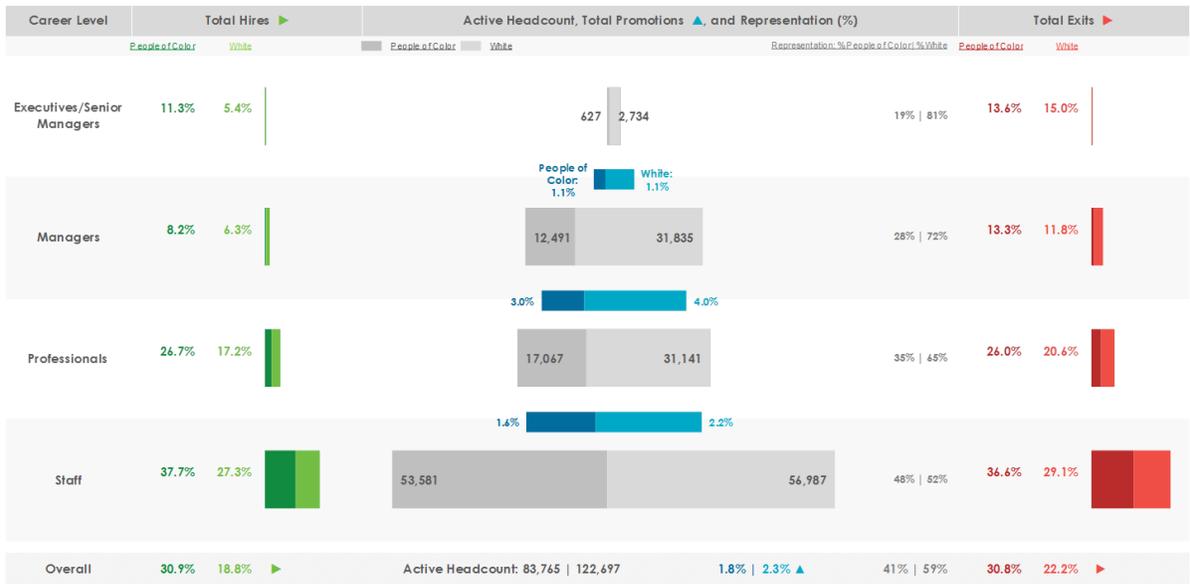
Level	Industry	Multi-System Operators	Programmers
Board of Directors	1.5	3.4	8.7
Executives/Sr. Managers	0.4	2.0	0.7
Managers	1.1	1.7	-1.1
Professionals	0.3	1.7	-2.3
Overall Workforce	1.8	2.1	-1.0

● Increase of 1 %pt or more
 ● Less than 1 %pt difference
 ● Decrease of 1-2 %pts
 ● Decrease of more than 2 %pts

- As shown in the ILM Map on the following page, the overall industry hire rate for people of color exceeds the rate for whites by roughly 12 percentage points, while the turnover rate is about nine percentage points higher for people of color than for whites. The overall promotion rate is slightly lower for people of color as compared to whites. The patterns for young professionals are similar, except for promotions, where the rate for whites (4.1%) is twice the rate for people of color (2.0%).

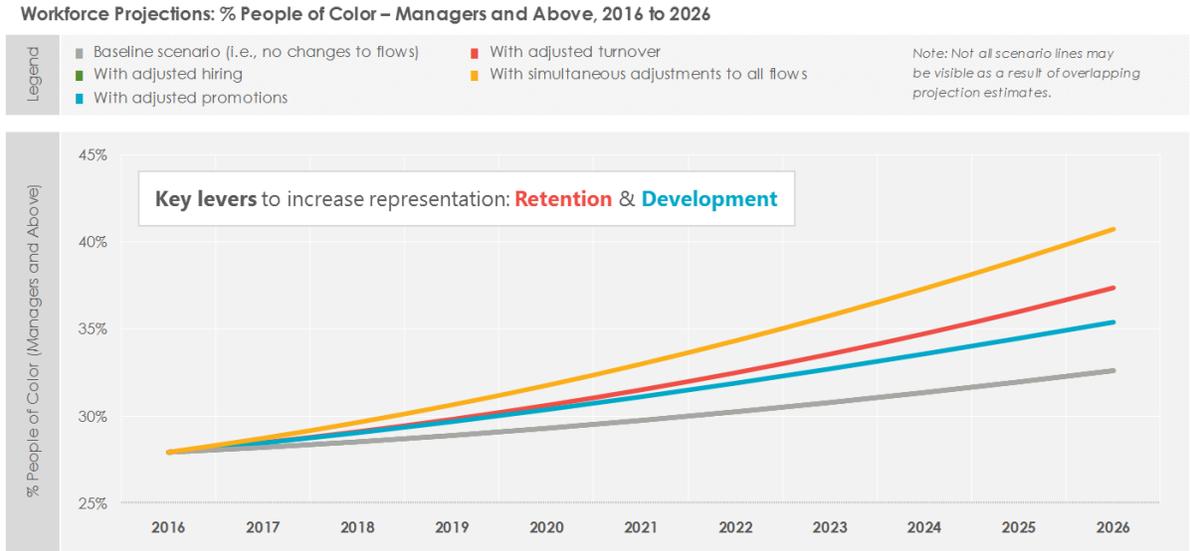
³ Unless otherwise stated, key highlights for people of color and for women reflect full-time employees at participating organizations who are active, on disability (STD & LTD), or on leave of absence, excluding temporary/contingent employees and employees who reside and work outside the United States and its territories. | Hire rates, promotion rates, and turnover rates in this document refer to rates at the Staff level and above (i.e., Staff, Professionals, Managers, and Executives/Senior Managers) and exclude Blue Collar workers. | Young professionals include employees who were born on or after January 1, 1981. Projections discussed here refer to this cohort of the workforce.

⁴ People of color include those classified as Hispanic/Latino, Black or African American, Native Hawaiian or Other Pacific Islander, Asian, American Indian or Alaskan Native, or Two or more races.



- Projections indicate that if current workforce dynamics persist, the representation of people of color at the manager level and above is expected to increase by roughly two percentage points in the next five years and five percentage points in the next ten years. This outcome could be improved if organizations are able to retain and promote people of color at the same rates as their white counterparts. Similar patterns are observed among young professionals.

Summary of representation changes between 2016 and 2026, baseline vs. simultaneous changes						
Current and Projected People of Color Representation %	Current Period: 2016		5-year Projection: 2021		10-year Projection: 2026	
	Baseline Scenario	With All Changes	Baseline Scenario	With All Changes	Baseline Scenario	With All Changes
Managers and Above	28%	28%	30%	33%	33%	41%



- ILM dynamics for operators are very similar to overall industry dynamics, while the dynamics for programmers show less movement. In terms of key levers to increase representation, retention is the most significant lever for operators, while development is the most important lever for programmers, followed by retention. The patterns observed for young professionals of color

amongst operators mirror the patterns for operators overall. Similarly, the patterns observed for young professionals of color amongst programmers mirror the patterns for programmers overall.

Women⁵

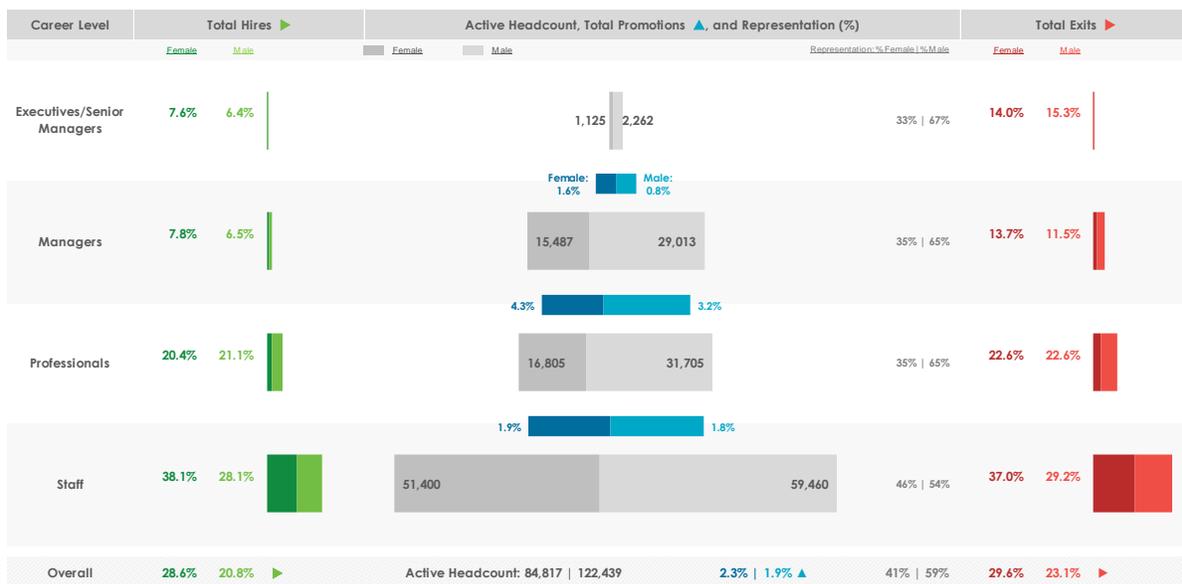
- Based on survey-over-survey participant data, industry representation of women increased over five percentage points from 2015 for executives and remained constant at other levels. Female representation among operators is down or flat, and among programmers is up for certain levels and down or flat for others.

Percentage Point (%pt) Change in Female Representation
Survey-over-survey participants only (2015, 2017)

Level	Industry	Multi-System Operators	Programmers
Board of Directors	0.5	-2.8	7.2
Executives/Sr. Managers	5.2	0.7	>10
Managers	-0.6	-0.3	-1.5
Professionals	0.1	-0.1	1.1
Overall Workforce	-0.4	-0.4	0.5

● Increase of 1 %pt or more
 ● Less than 1 %pt difference
 ● Decrease of 1-2 %pts
 ● Decrease of more than 2 %pts

- As shown in the ILM Map below, the overall industry hire rate for women exceeds the rate for men by roughly eight percentage points, while the turnover rate is 6.5 percentage points higher for women than for men. The overall promotion rate is slightly higher for women as compared to men. The hire, turnover, and promotion patterns for young professionals are similar.

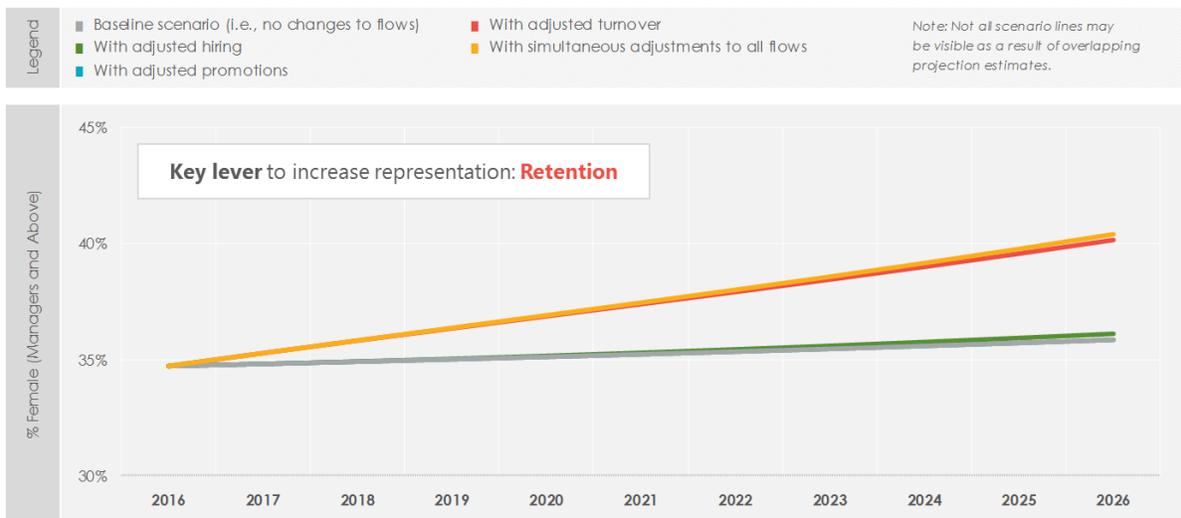


⁵ The greater than ten percentage point increase of women at the executive/senior manager level among programmers was influenced by an internal shift in how one organization reported it from 2015 to 2017.

- Projections indicate that if current workforce dynamics persist, female representation at the manager level and above is expected to remain flat over the next five years, and increase by one percentage point in the next ten years. This outcome could be improved if organizations are able to retain women at the same rates as their male counterparts. Assuming no changes to the ILM dynamics, the representation of young professional females at the manager and above levels is expected to increase by four percentage points over the next five years, and by eight percentage points over the next ten years. Key levers to further increase the representation of young professional women are retention and hiring.

Summary of representation changes between 2016 and 2026, baseline vs. simultaneous changes						
Current and Projected Female Representation %	Current Period: 2016		5-year Projection: 2021		10-year Projection: 2026	
	Baseline Scenario	With All Changes	Baseline Scenario	With All Changes	Baseline Scenario	With All Changes
Managers and Above	35%	35%	35%	37%	36%	40%

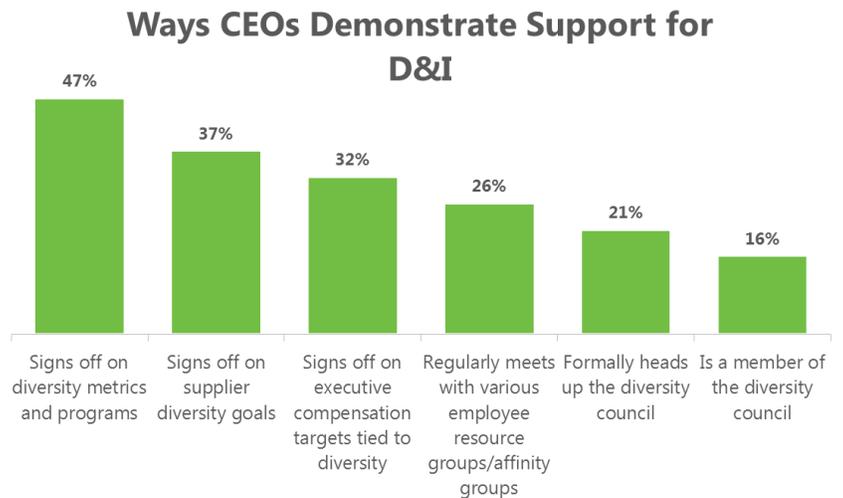
Workforce Projections: % Female – Managers and Above, 2016 to 2026



- ILM dynamics for operators and programmers are very similar to overall industry dynamics. Retention is the key lever for increasing female representation at the senior levels for the industry as a whole, and for operators and programmers alike. Among operators, the representation of young professional females at the manager and above levels is expected to increase, with hiring and retention identified as the most important factors to increase the representation even further. Among programmers, the representation of young professional females at the manager and above levels is expected to decrease by three percentage points over the next ten years unless improvements are made in retention and hiring. However, it is important to note that within young professionals working at programmers, the representation of females at the manager and above levels is currently 56 percent (higher than gender parity).

Policies and Practices

- The top ways in which survey participants' CEOs demonstrate support for diversity initiatives include signing off on diversity metrics and programs, and signing off on supplier diversity goals. Across the board, operator CEOs engage in these activities more than programmer CEOs.

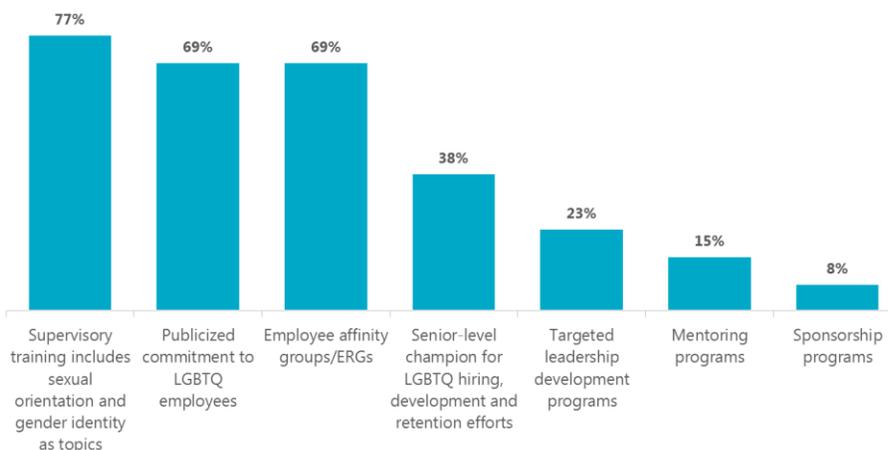


- The head of HR is most commonly identified as the person responsible for spearheading diversity and inclusion initiatives for the industry as a whole (60% selected) as well as for programmers (64% selected). Operators report the head of HR and the head of Diversity & Inclusion equally as responsible for leading such initiatives (50% selected both. Note that multiple responses were allowed).
- Just under 40 percent of participating organizations have staff dedicated exclusively to diversity and inclusion (down from 2015), while 65 percent have an internal group that focuses on D&I (up from 2015). More operators (67%) indicate they have staff dedicated to diversity and inclusion than do programmers (33%). Both sectors report having a group focused on D&I (67% for operators vs. 71% for programmers).
- The most common and least common diversity and inclusion practices are shown below:

Most Common D&I Practices	Industry	Multi-System Operators	Programmers
<small>% of responding organizations with practice</small>			
Community outreach is related to diversity	79%	100%	80%
Routinely checks for and acts to close gender and race/ethnicity gaps in hiring rates	75%	83%	73%
Diversity awareness is celebrated in the form of different cultural events	71%	100%	73%
Routinely checks for and acts to close gender and race/ethnicity gaps in turnover rates	71%	83%	73%
Routinely checks for and acts to close gender and race/ethnicity gaps in promotion rates	71%	83%	73%
Develops strategies to ensure diversity in suppliers, contractors, etc.	63%	67%	60%
Least Common D&I Practices	Industry	Multi-System Operators	Programmers
<small>% of responding organizations with practice</small>			
Sponsorship programs for women and people of color	21%	67%	7%
Programs with a focus on global/international diversity exist in the organization	21%	17%	20%
Bonus/incentive pay for management is linked to the achievement of organizational diversity goals	25%	50%	20%
People managers are held accountable for diversity-related tasks or outcomes in the performance management process	29%	50%	27%
Routinely checks for and acts to close gender and race/ethnicity gaps in performance ratings	33%	83%	13%
Mentoring programs for women and people of color	33%	33%	33%

- Six in ten respondents indicate they conduct pay equity analysis by gender either annually or more frequently, and five in ten indicate they conduct the analysis by race/ethnicity on an annual or more frequent basis. Virtually all operators report conducting pay equity analyses by gender and race/ethnicity annually or more frequently, whereas fewer than half of programmers report they are conducting such analyses annually or more frequently. Moreover, just under half of organizations that conduct pay equity analyses rely on a robust statistical approach (e.g., multiple regression), and have a formalized remediation process in place to address pay equity risks identified in the analysis.
- Almost 60 percent of participating organizations report offering diversity and inclusion training in 2016. More operators report providing training than programmers (83% vs. 53%).

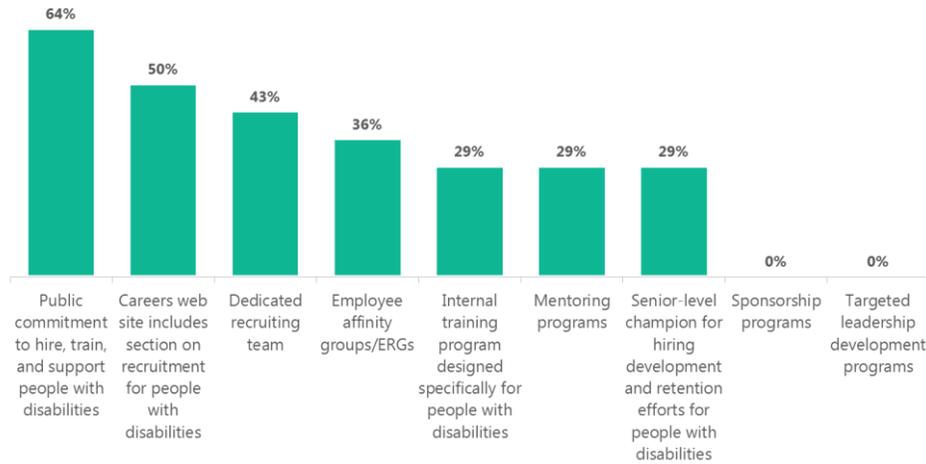
Ways Organizations Support LGBTQ Employees



Ways Organizations Support Veterans



Ways Organizations Support People with Disabilities

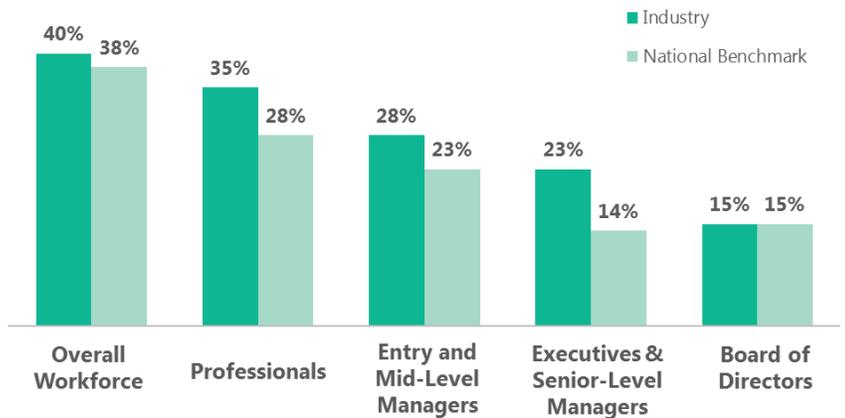


NATIONAL BENCHMARKS

People of Color

- Industry representation of people of color exceeds the national benchmark at all levels, with the exception of Boards of Directors, for whom representation is on par with the national benchmark at 15 percent. The most notable differences are for executives and professionals, for whom industry representation outpaces the national benchmark by nine percentage points and seven percentage points, respectively.

% People of Color

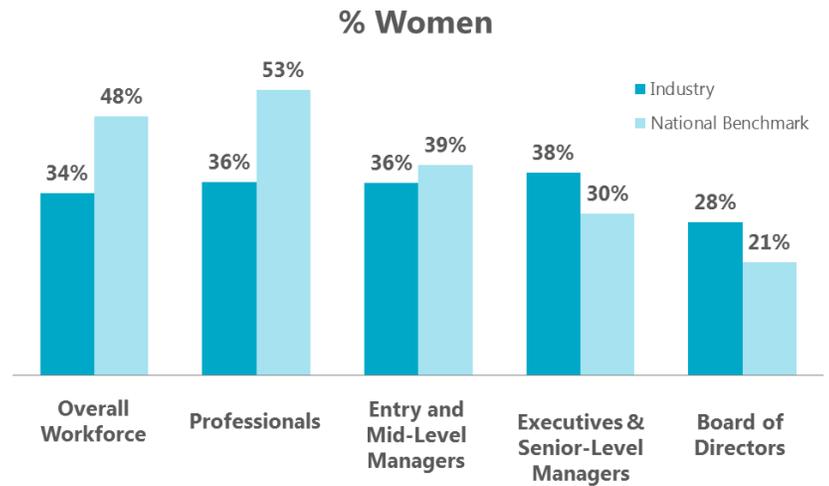


- Representation compares favorably to the national benchmark for both operators and programmers, with all figures on par or exceeding the benchmark, with the exception of the overall workforce for programmers.

% People of Color	National Benchmark	Industry	Multi-System Operators	Programmers
Board of Directors	15%	15%	17%	16%
Executives/Sr. Manager	14%	23%	15%	32%
Managers	23%	28%	29%	26%
Professionals	28%	35%	32%	38%
Overall Workforce	38%	40%	42%	33%

Women

- Industry representation of women exceeds the national benchmark for executives and Boards of Directors; however, it trails the national benchmark at the lower levels. The most notable differences are for professionals and the overall workforce, for whom industry representation is lower than the national benchmark by 17 percentage points and 14 percentage points, respectively.



- Operators and programmers trail the benchmark by ten percentage points or more at the Professional level. By sector, representation of women⁶ consistently compares negatively to the national benchmark for operators, while the comparison is mixed for programmers.

% Women	National Benchmark	Industry	Multi-System Operators	Programmers
Board of Directors	21%	28%	12%	23%
Executives/Sr. Manager	30%	38%	27%	49%
Managers	39%	36%	32%	46%
Professionals	53%	36%	32%	43%
Overall Workforce	48%	34%	31%	46%

- Currently, 12 percent of entry and mid-level managers are women of color, which is slightly higher than the national benchmark (10%). Representation of women of color among operators stands at 11 percent, which is likewise slightly higher than the national benchmark. Representation of women of color among programmers stands at 15 percent, which considerably exceeds the national benchmark.

⁶ Board of directors industry figure (28%) is skewed upwards by the relatively high representation of women on the boards of non-profit organizations that participated in the survey.

NATIONAL BENCHMARK DATA

Publicly available data sources were used to generate four national representation benchmarks: all industries in the U.S. (shown in this executive summary); the Information sector; and the Broadcasting and Telecommunications industries, which are both part of the Information sector. The Information sector includes organizations involved in publishing (including software publishing), motion picture and sound recording, broadcasting, telecommunications, data processing and hosting, and other information services such as internet publishing and web search portals. These national benchmarks are based on the Equal Employment Opportunity Commission's Jobs Patterns for Minorities and Women in Private Industry database. The database provides aggregated information on the distribution of women and minorities by EEO-1 job classification for private employers with more than 100 employees. Data are available by geographic area and industry. For this study, 2015 information was captured for all industries, for the Information sector (NAICS 51), and for the Broadcasting (NAICS 515) and Telecommunications (NAICS 517) industries.⁷ Total industry workforce estimates come from Bortz Media & Sports Group, Inc.'s *Unleashing Connectivity and Entertainment in America, 2017* (retrieved from <https://www.ncta.com/impact>). The national benchmarks for Boards of Directors come from the *Spencer Stuart U.S. Board Index 2016* report (retrieved from <https://www.spencerstuart.com/research-and-insight/spencer-stuart-board-index-2016>).

ABOUT NAMIC

NAMIC (National Association for Multi-ethnicity in Communications) is the premier organization focusing on multicultural diversity, equity and inclusion in the communications industry. More than 3,500 professionals belong to a network of 18 chapters nationwide. Through initiatives that target leadership development, advocacy and empowerment, NAMIC collaborates with industry partners to grow and nurture a workforce that reflects the cultural richness of the populations served. Please visit www.namic.com for more information about NAMIC and its many opportunities.

ABOUT WICT

Women in Cable Telecommunications (WICT) | WICT's mission is to create women leaders who transform our industry. We do this by providing unparalleled professional development programs, commissioning original gender research, and supporting a B2B network that helps advance women. For nearly 40 years, WICT has partnered with cable and technology companies to help build a more robust pipeline of women leaders. Founded in 1979, and now over 10,000 members strong, WICT is the largest and oldest professional association serving women in cable media. **Comcast NBCUniversal, Charter Communications, and Turner** are WICT's Strategic Touchstone Partners. Please visit www.wict.org or follow [@WICT](https://twitter.com/WICT) on Twitter for more information.

ABOUT MERCER

Mercer delivers advice and technology-driven solutions that help organizations meet the health, wealth and career needs of a changing workforce. Mercer's more than 22,000 employees are based in 43 countries and the firm operates in over 130 countries. Mercer is a wholly owned subsidiary of Marsh & McLennan Companies (NYSE: MMC), the leading global professional services firm in the areas of risk, strategy and people. With more than 60,000 colleagues and annual revenue over \$13 billion, Marsh & McLennan helps clients navigate an increasingly dynamic and complex environment. For more information, visit www.mercer.com. Follow Mercer on Twitter [@Mercer](https://twitter.com/Mercer).

ABOUT THE WALTER KAITZ FOUNDATION

The Walter Kaitz Foundation advocates for diversity and inclusion across the media and entertainment industries. In addition, the Foundation provides targeted funding to key organizations within the industry that support vital programs and initiatives that promote the contributions of women and people of color. The Foundation also curates programs which are designed to bring together various partners and stakeholders who work towards the diversification of the industry's workforce, expanding its supplier diversity base and promotes diversity in its programming content. Please visit www.walterkaitz.org or follow [@WalterKaitz](https://twitter.com/WalterKaitz) on Twitter for more information about the organization.

⁷ More detail on the NAICS industry classification can be found at <http://www.census.gov/eos/www/naics/>.

