

HEALTH WEALTH CAREER

2019 NAMIC-WICT DIVERSITY SURVEY EXECUTIVE SUMMARY



THE NAMIC AIM

In collaboration with **Mercer**

Underwritten by the **Walter Kaitz Foundation**



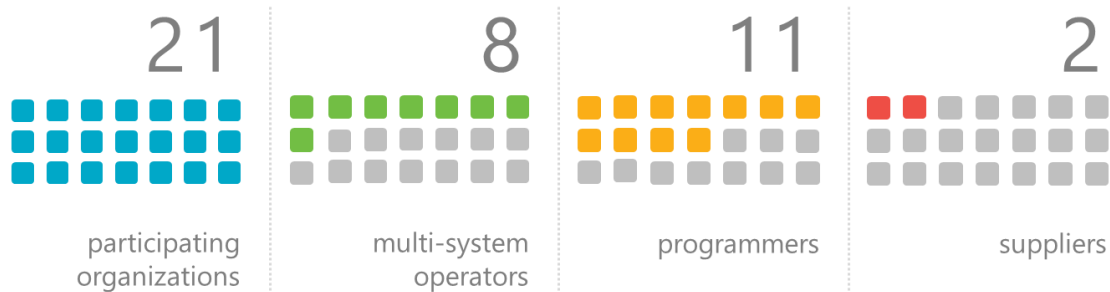
ABOUT THE SURVEY

The National Association for Multi-Ethnicity in Communications (NAMIC) and Women in Cable Telecommunications (WICT) teamed up once again to conduct the 2019 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 2019, survey respondents were asked to report on 2018 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 2019 data. This is consistent with how the surveys have historically been conducted.

SURVEY METHODOLOGY

The primary research methodology for this study was an online survey of cable and communications companies. The survey, which consisted of 53 quantitative and qualitative questions, launched in February 2019 and was open for eight weeks, with periodic reminders sent to non-respondents. Respondents¹ comprised the following:



245,000+

people employed by participating organizations in the U.S., out of roughly 325,000 total directly employed in the industry.²

75.5%

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

¹ Sixteen organizations participated in both the 2017 and 2019 NAMIC and WICT diversity surveys. Some organizations were new to the survey in 2019, and some organizations that participated in 2017 did not participate in 2019. Thus, changes in survey benchmarks between 2017 and 2019 may be due, in part, to different organizations participating in the two surveys. Approximately 100 companies were invited to participate.

² The estimate of the total number of people directly employed in the industry was provided by Bortz Media & Sports Group, Inc. and does not include workforce estimates for suppliers.

Similar to prior years, the 2019 survey covered the following:

01

Diversity at the highest **leadership levels**.

02

Industry-wide Internal Labor Market (ILM) maps showing workforce dynamics—i.e., hires, promotions, and exits—of women and people of color in the industry.

03

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

04

Diversity practices and **commitment** to diversity and inclusion.

05

Non-traditional employee **benefits**.

Unless otherwise stated, the figures in this report reflect full-time employees at participating organizations who were 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, 1983.

OVERVIEW

For more than a decade, NAMIC and WICT have been measuring cable workforce demographics to assist the industry with its efforts to achieve stronger racial/ethnic and gender diversity.

In 2019, the overall workforce of people of color increased from 41 percent to 44 percent, while the percentage of women remained constant at 33 percent. Executives at the senior ranks (senior level officials and managers) rose from 25 percent to 28 percent for people of color and increased for women from 33 percent to 35 percent. As in previous years, Mercer studied the industry Internal Labor Market (ILM) maps to determine which factors most impact career trajectories. The 2019 data found that for women, closing the gaps in hiring and employee retention are central to achieving parity with men. For people of color, improving retention rates is necessary to achieving parity with their white counterparts.

SURVEY HIGHLIGHTS

People of Color³

- Representation of people of color in the industry has increased over the past two years. A look at the 16 organizations that participated in both the 2017 and 2019 surveys (i.e., “survey-over-survey” participants) shows that representation increased at all levels, with percentage point increases ranging from 0.5 to 3.3. The largest gains were among operators, which experienced increases of one percentage point or more across every level examined.

Industry Change in People of Color Representation
Survey-over-survey participants only (2019, 2017)

Level	2019	2017	Percentage Point (%pt) Change
Board of Directors ⁴	16.8%	15.3%	+1.5
Executives/ Sr. Managers ⁵	28.4%	25.1%	+3.3
Managers	31.5%	28.7%	+2.8
Professionals	37.5%	35.3%	+2.2

Operators Change in People of Color Representation
Survey-over-survey participants only (2019, 2017)

Level	2019	2017	Percentage Point (%pt) Change
Board of Directors ⁴	18.9%	16.7%	+2.3
Executives/ Sr. Managers ⁵	16.0%	14.6%	+1.3
Managers	31.6%	28.3%	+3.3
Professionals	33.6%	31.4%	+2.1

Programmers Change in People of Color Representation
Survey-over-survey participants only (2019, 2017)

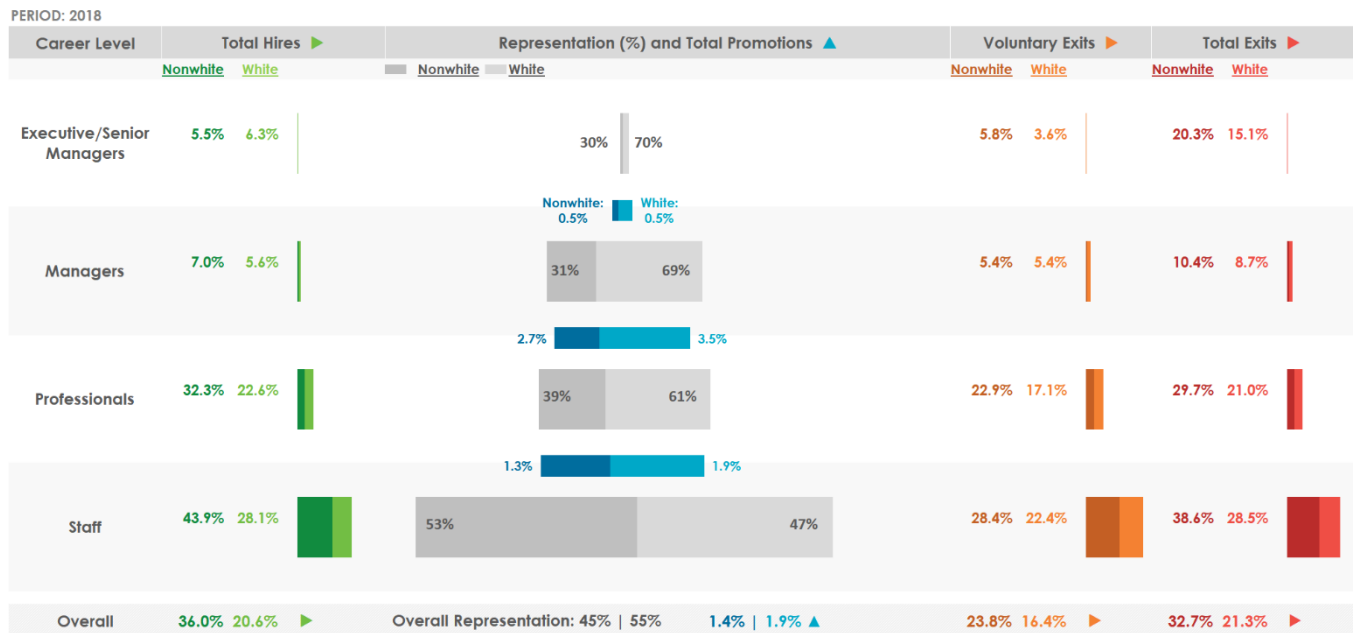
Level	2019	2017	Percentage Point (%pt) Change
Board of Directors ⁴	15.9%	14.6%	+1.2
Executives/ Sr. Managers ⁵	36.6%	36.1%	+0.5
Managers	31.0%	30.5%	+0.5
Professionals	46.1%	44.6%	+1.4

³ 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.

⁴ 10 companies were analyzed for the Board of Directors survey-over-survey comparison due to missing information in either 2017 or 2019 for six companies.

⁵ 15 companies were analyzed for the Executives/Sr. Managers survey-over-survey comparison due to missing information in 2017 for one company.

- As shown in the ILM Map below, the overall industry hire rate for people of color exceeds the rate for whites by roughly 15 percentage points, while the total turnover rate is about 11 percentage



points higher for people of color than for whites. Moreover, total turnover is higher for people of color than for whites at every career level. In addition to total turnover, this year's survey captured voluntary exits. Voluntary turnover rates show a similar pattern with people of color experiencing higher voluntary turnover rates at all but the manager level. The overall promotion rate is lower for people of color as compared to whites (1.4% versus 1.9%, respectively). The patterns for young professionals are similar, except for promotions, where the rate for whites (2.9%) is more than two times the rate for people of color (1.4%).

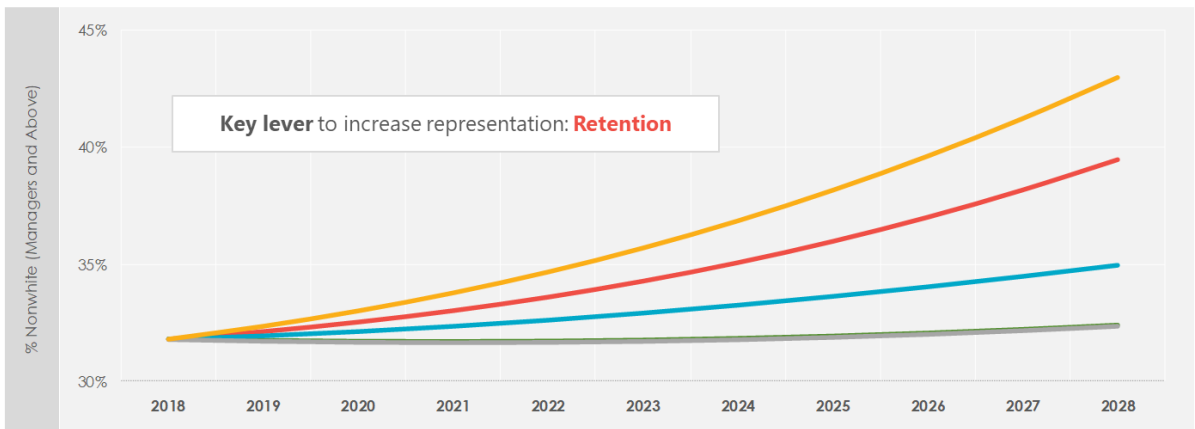
- Projections (see chart below) indicate that if current workforce dynamics persist, the representation of people of color at the manager level and above is expected to remain flat at 32 percent over the next ten years. This outcome could be improved to 43 percent if organizations are able to retain and promote people of color at the same rates as their white counterparts. Similar patterns are observed among young professionals, with one major difference: representation of young professionals of color at management levels is projected to decrease by two percentage points (from 38% to 36%) if current workforce dynamics persist.

Summary of representation changes between 2018 and 2028, baseline vs. simultaneous changes						
Current and Projected Nonwhite Representation %	Current Period: 2018		5-year Projection: 2023		10-year Projection: 2028	
	Baseline Scenario	With All Changes	Baseline Scenario	With All Changes	Baseline Scenario	With All Changes
Managers and Above	32%	32%	32%	36%	32%	43%

Workforce Projections: % Nonwhite – Managers and Above, 2018 to 2028

Legend

- Baseline scenario (i.e., no changes to flows)
- With adjusted turnover
- With adjusted hiring
- With simultaneous adjustments to all flows
- Note: Not all scenario lines may be visible as a result of overlapping projection estimates.



- ILM dynamics for operators are similar to overall industry dynamics, while the dynamics for programmers show less movement in terms of hires and exits. Regarding key levers to increase representation, retention is the most significant lever for both operators and programmers. 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.

Women

- Based on survey-over-survey participant data, industry representation of women increased since 2017 for boards, executives, and professionals, and declined by less than 1 percentage point for managers. Female representation among operators increased at the board and professional levels, and decreased for executives and managers. Looking at programmers, female representation increased at all levels.

Industry Change in Female Representation

Survey-over-survey participants only (2019, 2017)

Level	2019	2017	Percentage Point (%pt) Change
Board of Directors ⁴	25.2%	16.8%	+8.4
Executives/ Sr. Managers ⁵	34.9%	32.7%	+2.2
Managers	34.0%	34.6%	-0.7
Professionals	36.8%	35.6%	+1.2

Operators Change in Female Representation

Survey-over-survey participants only (2019, 2017)

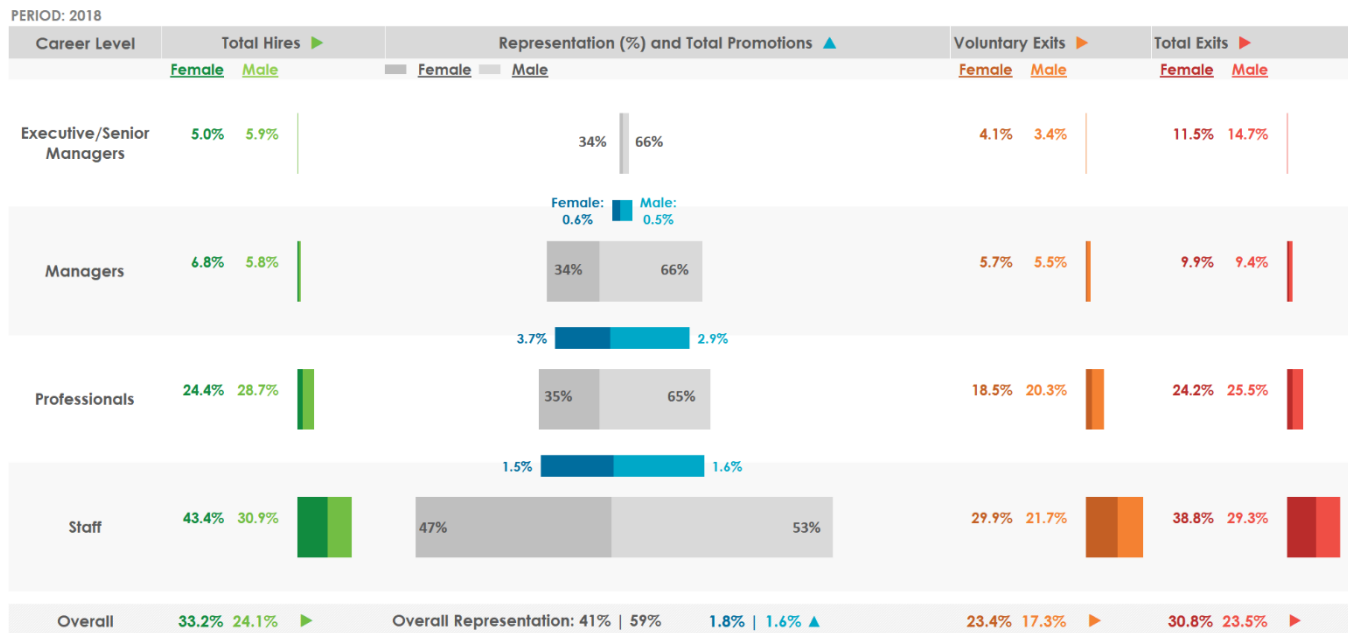
Level	2019	2017	Percentage Point (%pt) Change
Board of Directors ⁴	13.5%	11.9%	+1.6
Executives/ Sr. Managers ⁵	26.3%	26.6%	-0.3
Managers	30.6%	31.6%	-1.0
Professionals	32.7%	31.7%	+1.0

Programmers Change in Female Representation

Survey-over-survey participants only (2019, 2017)

Level	2019	2017	Percentage Point (%pt) Change
Board of Directors ⁴	30.5%	19.1%	+11.4
Executives/ Sr. Managers ⁵	40.6%	39.1%	+1.6
Managers	49.1%	48.4%	+0.8
Professionals	45.6%	44.9%	+0.7

- As shown in the ILM Map below, the overall industry hire rate for women exceeds the rate for men by roughly nine percentage points, while the total turnover rate is more than seven percentage



points higher for women than for men. Similarly, the voluntary turnover rate for women is more than six percentage points higher than the rate for men. The overall promotion rate is higher for women as compared to men (1.8% versus 1.6%, respectively). The hire, turnover, and promotion patterns for young professionals are similar.

- Projections (see chart below) indicate that if current workforce dynamics persist, female representation at the manager level and above is expected to increase by one percentage point over the next five years, and increase by three percentage points in the next ten years. This outcome could be improved if organizations are able to hire and 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 remain flat over the next five and ten years. The key lever to increase the representation of young professional women is hiring, particularly at the professional level.

Summary of representation changes between 2018 and 2028, baseline vs. simultaneous changes						
Current and Projected Female Representation %	Current Period: 2018		5-year Projection: 2023		10-year Projection: 2028	
	Baseline Scenario	With All Changes	Baseline Scenario	With All Changes	Baseline Scenario	With All Changes
Managers and Above	34%	34%	35%	36%	37%	40%

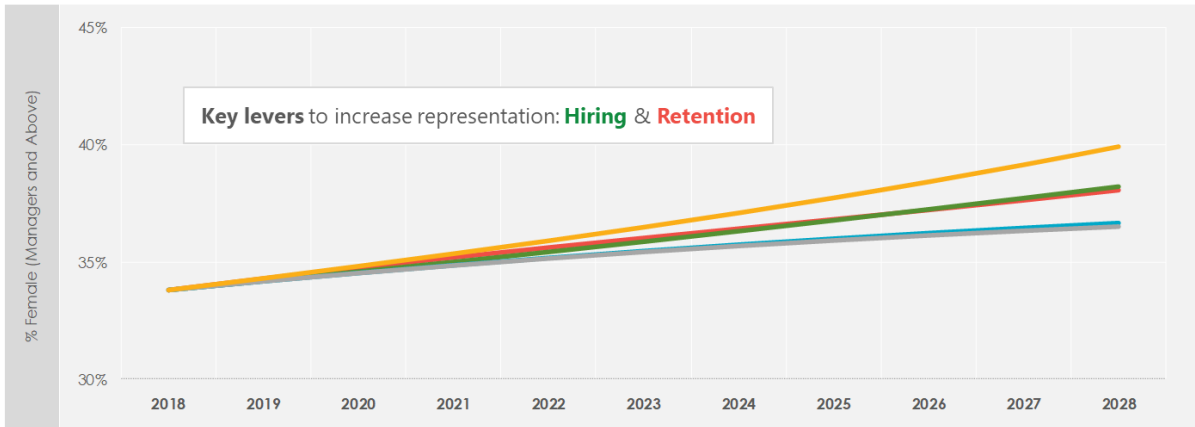
Workforce Projections: % Female – Managers and Above, 2018 to 2028

Legend

- Baseline scenario (i.e., no changes to flows)
- With adjusted turnover

- With adjusted hiring
- With simultaneous adjustments to all flows

Note: Not all scenario lines may be visible as a result of overlapping projection estimates.

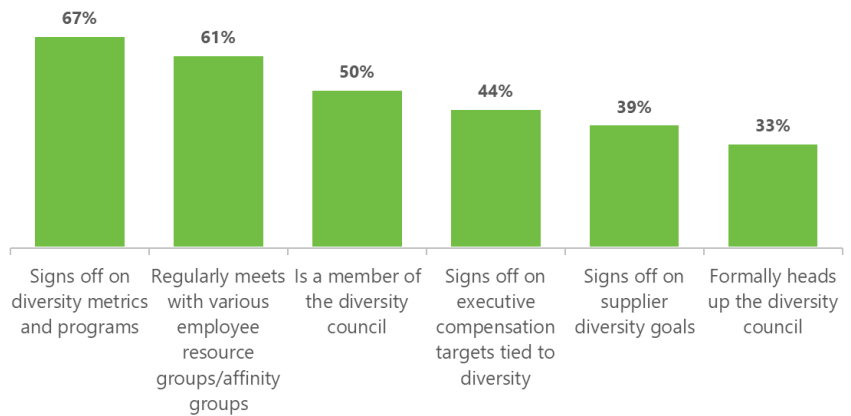


- ILM dynamics for operators and programmers are similar to overall industry dynamics, with the exception that for programmers, women are promoted at higher rates than men. Hiring and retention are the key levers for increasing female representation at the senior levels for the industry as a whole, and 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 identified as the most important factor 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 four 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 57 percent (higher than 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 regularly meeting with various employee resource/affinity groups. Operator CEOs engage in these activities more than programmer CEOs.

Ways CEOs Demonstrate Support for D&I



- A senior HR leader is most commonly identified as the person responsible for spearheading diversity and inclusion initiatives for the industry as a whole (37% selected), with Chief Diversity Officer as the second most common selection (32%). Among operators, an equal percentage (38%) reported the head of HR and Chief Diversity Officer as responsible for leading such initiatives. Among programmers, 44 percent identified the head of HR as spearheading diversity and inclusion initiatives and 22 percent identified the Chief Diversity Officer. Note that multiple responses were allowed.
- Fifty percent of participating organizations have staff dedicated exclusively to diversity and inclusion, while 80 percent have an internal group that focuses on diversity and inclusion (both up from 2017). More operators (75%) indicate they have staff dedicated to diversity and inclusion than do programmers (40%), while both sectors report having an internal group focused on diversity and inclusion (88% for operators vs. 70% for programmers).
- The most common and least common diversity and inclusion practices among survey participants are shown on the following page. The vast majority of organizations engage in community outreach, foster diversity awareness via cultural events, check for and act to close gender and race/ethnicity gaps in hiring, and offer targeted leadership opportunities to increase diversity in higher levels. Relatively few organizations have programs with a focus on global/international diversity or sponsorship programs for women and people of color. Across the most and least common diversity and inclusion practices, operators are more likely than programmers to engage in these practices.

Most Common D&I Practices % of responding organizations with practice	Industry	Multi-System Operators	Programmers
Community outreach is related to diversity (e.g., links between organization and educational institutions, government, etc.)	95%	100%	90%
Diversity awareness is celebrated in the form of different cultural events (e.g., Black History Month, Hispanic Heritage Month, etc.)	85%	88%	80%
Routinely checks for and acts to close gender and race/ethnicity gaps in hiring rates	85%	100%	70%
Targeted leadership development opportunities (e.g., mentoring, coaching, etc.) are designed to increase diversity in higher-level positions within the organization	80%	88%	70%
Employee attitude/satisfaction/engagement survey includes items that relate to organizational diversity and inclusion	75%	100%	50%
Aligns diversity strategy with business goals and objectives	70%	75%	60%
Routinely checks for and acts to close gender and race/ethnicity gaps in promotion rates	70%	100%	50%

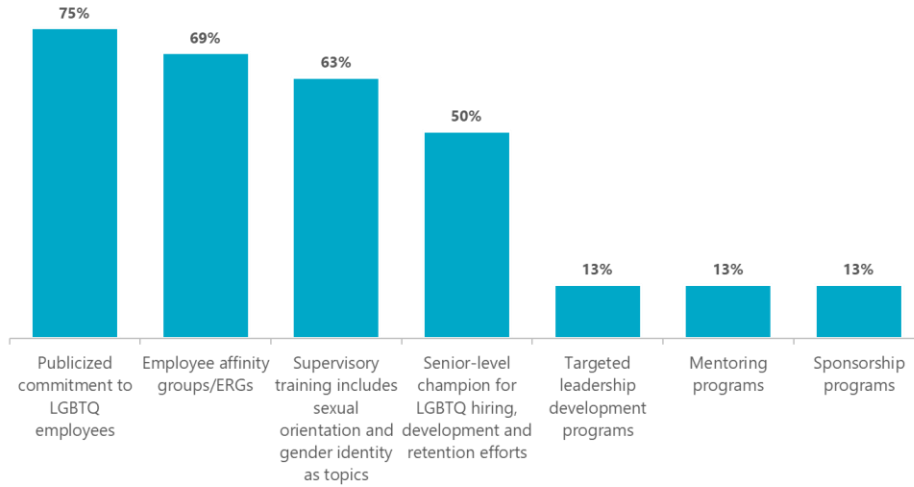
Least Common D&I Practices % of responding organizations with practice	Industry	Multi-System Operators	Programmers
Mentoring programs for women and people of color	45%	63%	40%
People managers are held accountable for diversity-related tasks or outcomes in the performance management process	40%	50%	30%
Bonus/incentive pay for management is linked to the achievement of organizational diversity goals	35%	50%	30%
Routinely checks for and acts to close gender and race/ethnicity gaps in performance ratings	35%	50%	20%
Sponsorship programs for women and people of color	30%	38%	30%
Programs with a focus on global/international diversity exist in the organization	30%	38%	30%

- Fifty-three percent of respondents indicate they conduct pay equity analysis by gender either annually or more frequently, and 56 percent indicate they conduct the analysis by race/ethnicity on an annual or more frequent basis. Eighty-six percent of operators report conducting pay equity analyses by gender and race/ethnicity annually or more frequently, whereas 30 percent of programmers report they are conducting such analyses annually or more frequently. Moreover, 73 percent of organizations that conduct pay equity analyses rely on a robust statistical approach (e.g., multiple regression), and 63 percent have a formalized remediation process in place to address pay equity risks identified in the analysis.
- More than two-thirds of participating organizations report offering diversity and inclusion training in 2018, with over half of participating organizations listing their 2018 diversity training as mandatory.

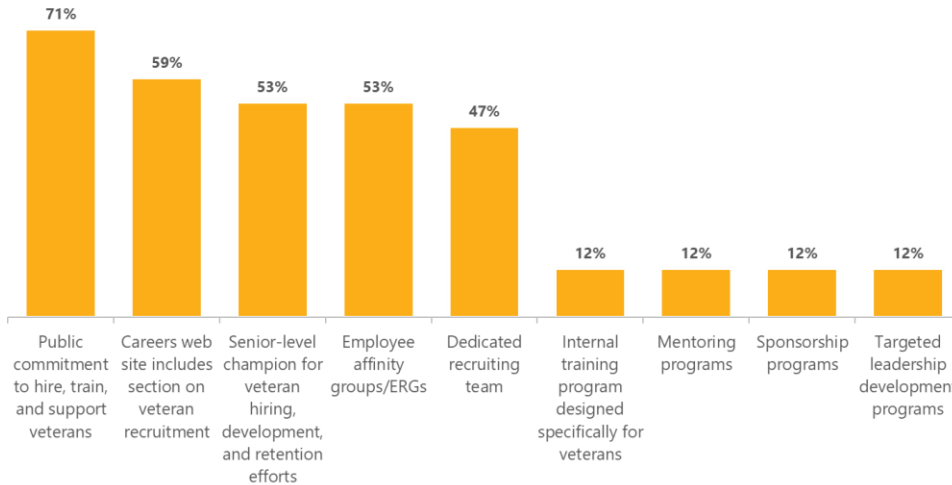
Other Dimensions of Diversity

Survey respondents were asked to provide information on the ways in which their organizations support LGBTQ employees in the workplace, veterans returning to the civilian workforce, and people with disabilities. The most common way in which participating organizations support these groups is via a publicized commitment of support.

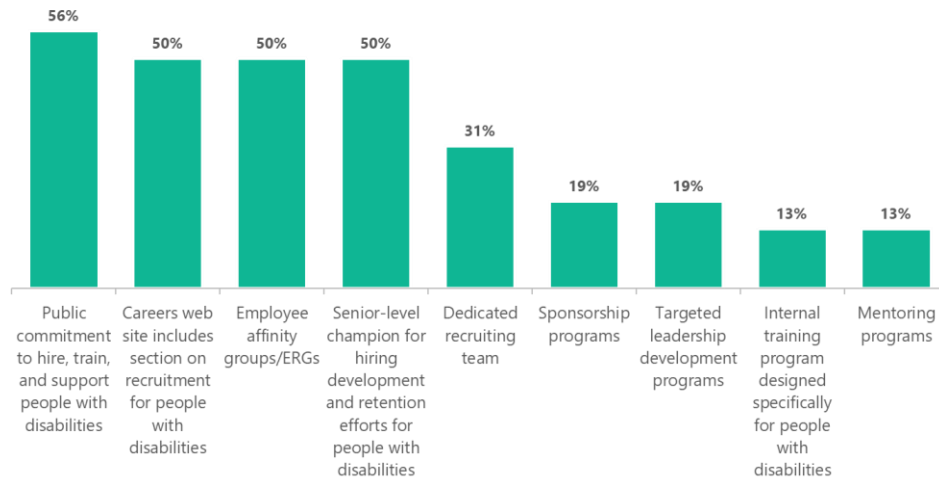
Ways Organizations Support LGBTQ Employees



Ways Organizations Support Veterans



Ways Organizations Support People with Disabilities

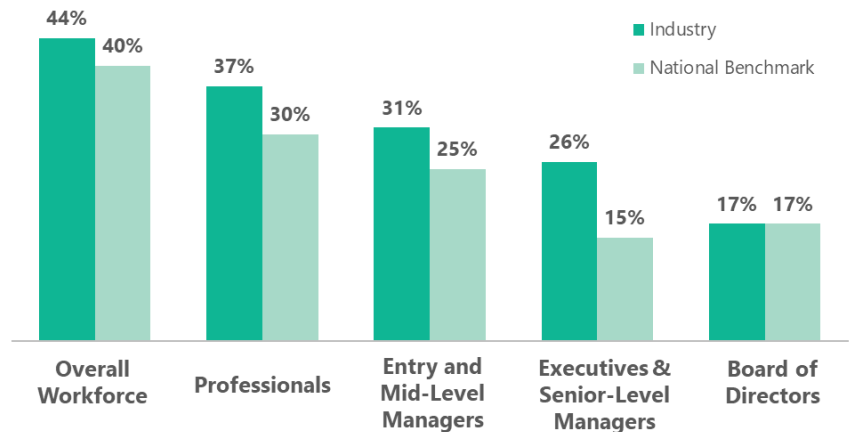


NATIONAL BENCHMARKS

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 17 percent. The largest differences are for executives and professionals, for whom industry representation outpaces the national benchmark by 11 percentage points and seven percentage points, respectively.

% People of Color

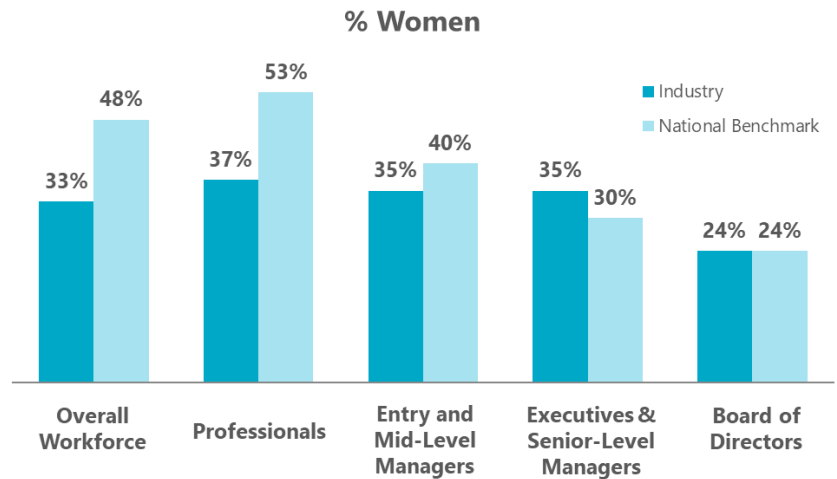


- Representation compares favorably to the national benchmark for both operators and programmers, with all figures on par or exceeding the benchmark, with the exception of board of directors for operators and the overall workforce for programmers.

% People of Color	National Benchmark	Industry	Multi-System Operators	Programmers
Board of Directors	17%	17%	14%	20%
Executives/Sr. Managers	15%	26%	16%	32%
Managers	25%	31%	31%	30%
Professionals	30%	37%	33%	43%
Overall Workforce	40%	44%	45%	39%

Women

- Industry representation of women exceeds the national benchmark for executives and senior-level managers by 5 percentage points and meets the national benchmark for board of directors. However, representation trails the national benchmark at the lower levels, with the largest differences for professionals and the overall workforce (lower by 16 and 15 percentage points, respectively).



- By sector, representation of women is consistently lower than the national benchmark for operators. By comparison, programmers exceed national benchmarks in three areas and trail behind national benchmarks at the professional level and the overall workforce.

% Women	National Benchmark	Industry	Multi-System Operators	Programmers
Board of Directors	24%	24%	17%	31%
Executives/Sr. Managers	30%	35%	26%	39%
Managers	40%	35%	31%	49%
Professionals	53%	37%	32%	45%
Overall Workforce	48%	33%	31%	46%

- Currently, 17 percent of the industry workforce are women of color, which is lower than the national benchmark of 20 percent. Representation of women of color among operators stands at 17 percent, while representation of women of color among programmers stands at 20 percent. Looking at the executive level shows that the representation of women of color is 12 percent for the industry, 5 percent for operators, and 16 percent for programmers, all of which meet or exceed the national benchmark of 5 percent.

% Women of Color	National Benchmark	Industry	Multi-System Operators	Programmers
Board of Directors	5%	4%	3%	4%
Executives/Sr. Managers	5%	12%	5%	16%
Managers	11%	13%	11%	17%
Professionals	16%	16%	13%	21%
Overall Workforce	20%	17%	17%	20%

NATIONAL BENCHMARK DATA

The national benchmarks in this report are based on three publicly available data sources. The first is 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. The figures reported reflect all industries in the US collectively. The second is the *2018 U.S. Spencer Stuart Board Index* report (retrieved from <https://www.spencerstuart.com/research-and-insight/ssbi-2018>). The third is the *Missing Pieces Report: The 2018 Board Diversity Census of Women and Minorities on Fortune 500 Boards* (retrieved from <https://www2.deloitte.com/us/en/pages/center-for-board-effectiveness/articles/missing-pieces-fortune-500-board-diversity-study-2018.html>).

ABOUT NAMIC

NAMIC (National Association for Multi-ethnicity in Communications) is the premier organization focusing on cultural diversity, equity and inclusion in the communications industry. More than 4,000 professionals belong to a network of 18 chapters nationwide. Through initiatives that target leadership development, advocacy and empowerment, NAMIC collaborates with industry partners to expand and nurture a workforce that reflects the cultural richness of the populations served. Please visit www.namic.com or follow @NAMICNational on Twitter for more information about NAMIC and its many opportunities.

ABOUT WICT

WICT is a global organization whose 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 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 10,500 members strong, WICT is the largest and oldest professional association serving women in cable media. **Charter Communications** and **Comcast NBCUniversal** are WICT's Strategic Touchstone Partners. Please visit www.wict.org or follow @WICTHQ on Twitter for more information.

ABOUT MERCER

[Mercer](http://www.mercer.com) delivers advice and technology-driven solutions that help organizations meet the health, wealth and career needs of a changing workforce. Mercer's more than 23,000 employees are based in 44 countries and the firm operates in over 130 countries. Mercer is a wholly owned subsidiary of [Marsh & McLennan Companies](http://www.marshmclennan.com) (NYSE: MMC), the leading global professional services firm in the areas of risk, strategy and people. With 75,000 colleagues and annualized revenue approaching \$17 billion through its market-leading companies including [Marsh](http://www.marsh.com), [Guy Carpenter](http://www.guycarpenter.com) and [Oliver Wyman](http://www.oliverwyman.com), 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 advances diversity, equity and inclusion in the media and entertainment industries. The Foundation provides targeted grants to key organizations within the industry, supports vital industry research and initiatives that promote diversity and inclusion in the workforce and collaborates with key stakeholders to procure diverse content curation. The Foundation also develops unique programs and initiatives designed to educate and facilitate collaboration between partners and benefactors that align with our mission. Please visit www.walterkaitz.org and subscribe to our newsletter to learn more about our organization.

