



# Digital equality?

Women in the digital revolution





---

# Editorial

We all experience it on a daily basis. Digital technologies have profoundly transformed our relationship with work over the past 15-years. This change is not only technical - it is above all social. Among the effects to be credited to all things digital is the better organization of work.

Greater flexibility, a more collaborative managerial culture, better access to information and the possibility of forming and maintaining networks - all the achievements made possible by digital benefit all of us, but especially women, who still struggle over the rigidities of the way work is organized in our societies.

The results of the “Digital equality?” study, conducted with Roland Berger, Numa and La Journée de La Femme Digitale, confirm these developments. 74% of respondents, both men and women, believe digital technologies facilitate women's careers. Furthermore, 60% of women think the digital transformation of companies is beneficial for their career. What better reward for all those who share the conviction that digital is a powerful lever for social transformation?

It would be dangerous to rely on this good news without considering the challenges that still await us. Digital technology certainly allows women to bypass a number of barriers, but we must ensure that it offers them truly new opportunities, and not just the means to circumvent the remaining barriers. Digital also needs to become a resource accessible to all,

with managers more aware of the opportunities that it opens to them. We need to think about how it can be democratized. Finally, efforts must continue to ensure that there are more female coders, developers and entrepreneurs working in tech in the future. Being a user of digital technologies is one thing, but taking part fully in the technical innovations that shape the coming world is also necessary. It is now recognized that female-founded companies often outperform male-founded startups in terms of market valuation growth since first round investments<sup>1</sup>. And yet too few women embark on the adventure.

Roland Berger, Numa and La Journée de La Femme Digitale have joined forces to provide an unprecedented international perspective on how digital transformation is changing women's work lives. We invite you to share these results so that digital is always more empowering - for all!

**Anne Bioulac**

Senior Partner, Roland Berger

**Delphine Remy-Boutang**

Co-founder of JFD, founder of the bureau and of the JFD Connect club

**Marie-Vorgan Le Barzic**

CEO, NUMA

---

<sup>1</sup> “4 Factors That Predict Startup Success, and One That Doesn't” Tucker J. Marion, Harvard Business Review, May 03, 2016

---

## Executive summary

How have digital technologies transformed the place of women in the professional world? Do these technologies create new professional opportunities? Do they reduce inequalities in the workplace? Are these opportunities the same at every stage of professional life? This is what the “Digital equality?” study, conducted by Roland Berger, Numa and La Journée de La Femme Digitale, sought to better understand through an online survey of 3000 people, conducted from October to December, 2016, in more than 60 countries.

Three topics were considered in the survey, corresponding to the key stages of professional lives. Firstly, we look at the entry into working life, including entrepreneurship and intrapreneurship, in order to understand how women rely on digital to launch projects. Secondly, we focus on career development, to see if and how digital supports women's career path evolution. Finally, we assess access to leading positions, to address the question of how digital opens new leadership opportunities to women and helps them correct the gender bias.

The study highlights a broad consensus on the positive effects of digital. 74% of women and men believe digital technologies ease women's professional lives. Women also believe that digital helps them to highlight certain specific qualities. 72% think that digital projects carried out by women differ from those carried out by men, mainly on the management mode. Regarding professional development, 60% of women

and men think the digital transformation of companies is a source of professional opportunity for women. But 81% of women think it is necessary to make professional equality a corporate priority, and not rely only on digital to move things forward. They also strongly support (75%) the implementation of gender equality key performance indicators (KPIs). On leadership, men and women often have opposing views. 62% of women think they do not have equal access to C-level positions - a belief 53% of men disagree with. But women remain confident, 63% believe digital will help them fight gender bias and aid them in progressing professionally. Finally, 73% of women and 61% of men think women have their own part to play in the digital revolution.

Significant differences arise in different geographic areas. The United States and Canada are more optimistic about the digital capabilities of offering professional opportunities to women. But they are less sensitive to gender differences: only 45% think that women's digital projects are specific, and fewer people believe it is important that professional equality be a priority for entrepreneurs (69%). Europeans on the other hand are less optimistic about the opportunities offered by digital, and more sensitive to the gender gap. Asia is characterized by both strong optimism and a very gendered view of the subject (93% of respondents think that projects carried out by women are different). The professional category of respondents is also very significant. Entrepreneurs and managers are more confident in the opportunities offered by digital.



# Digital equality?

## Women in the digital revolution

Getting started on a project, moving forward, accessing top management responsibilities... Through all the key stages in our professional life, whether we are an entrepreneur or an employee, digital is there, accompanying us. How do women seize the opportunities of digital? What do they hope for and achieve through the digital revolution? This is what the *"Digital equality?"* study sought to better understand.

---

**BEGINNING.**

**74%**

"Digital technologies have eased the path for women in the workplace."

**EVOLVING.**

**60%**

"Digital transformation of companies is a source of professional opportunity for women."

**LEADING.**

**73%**

"Women will be key drivers of the digital revolution."

---

---

# Does the digital woman exist?

“What best defines a digital woman?” is the first question we put to our respondents, in order to better understand how they view the topic and what lies behind the term “digital”. Do they see it as the set of digital tools and technologies we use on a daily basis? As an industry? Or rather, as a mindset and a specific culture?

The result is balanced between harder (technology and industry) and softer (culture and mindset) visions of digital. For 40% of respondents, a digital woman is “*somebody who uses digital tools on a daily basis and is always connected*”. It is “*somebody who has a web culture*” for 27%, a “*state of mind*” for 24%, and “*somebody who works at a technology company or founded a startup*” for 9%. Americans have the most clear-cut view of who or what a digital woman embodies. For half of people in the US, it refers to the daily use of digital tools and technologies.

However, the majority of respondents fundamentally believe there is no difference between a digital woman and a digital man. 89% of men and 79% of women hold this view, and the opinion is shared across professions and generations. Surprisingly, women are more likely to believe there is a specificity of the “digital woman”. Some qualitative comments unfortunately indicate that gender stereotypes are still prevalent in the digital world. For example, the idea that the adjective “digital”, when applied to women, refers to a distinct or specific characteristic, for example collaborative, empathic or open. And that it refers to technical skills when applied to men.

“The tools and objectives are different between men and women. **Women tend to use social media and other tools that connect them and have an impact on the world around them**, while men are more interested in the technologies themselves.”

.....

“I think we associate the term *Digital man* with somebody who has IT knowledge. **On the other hand, *Digital woman* is more associated with someone who can connect people together.**”

### In your opinion, which of the following statements best defines a "digital woman"?

... Someone who can use the computer

**Somebody who feels comfortable in the digital world, who is interacting proactively with it, taking and creating the opportunities it offers / new opportunities**

Somebody willing to use digital technology to change management, relationships, business...

**Mix of creative digital technologies together with classic business tools**

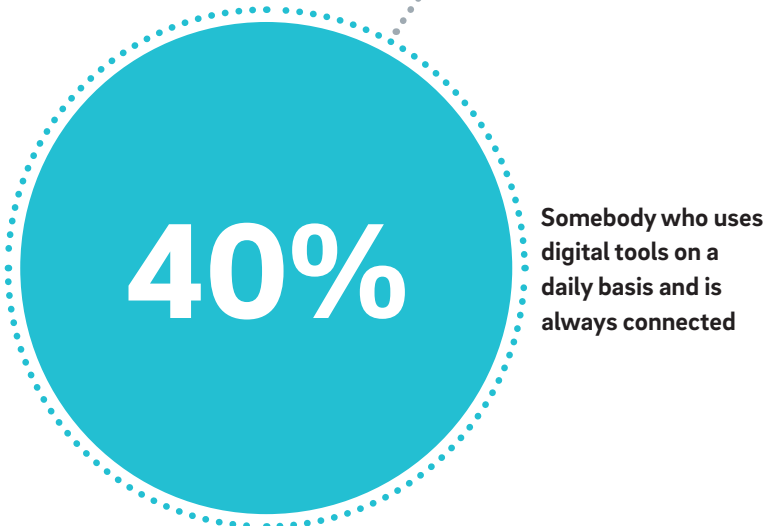
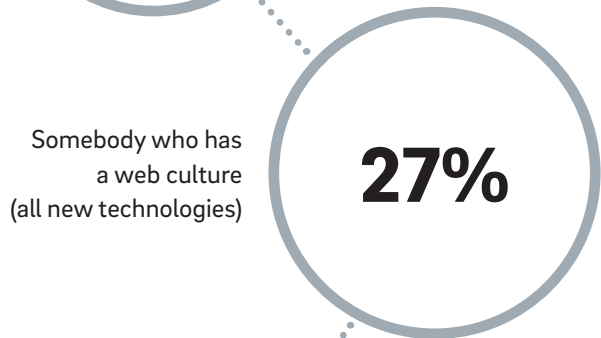
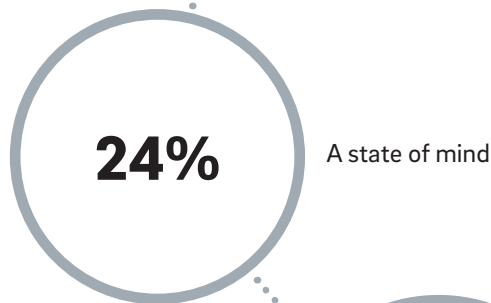
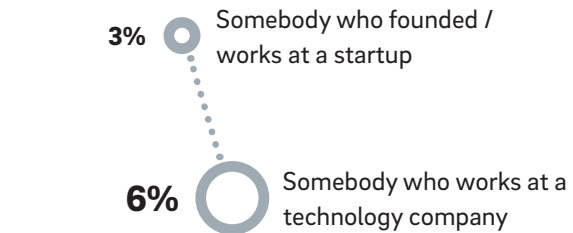
Somebody who uses digital tools to manage work life balance i.e. working from home, connecting with children, organizing daily life.

**Technical knowledge (e.g. skills in programming of any kind)**

Openness and curiosity towards new digital technologies

**A woman defining herself via her social media presence**

A woman that is able to freely work anytime any place because of the digital tools...



# Digital equality?

**BEGINNING.**



# Does digital help women get started?

There is a widespread consensus that digital technologies help women get started professionally, either as entrepreneurs or in companies. 74% of men and women realize digital technologies make life easier for women.

But this does not mean men and women use digital in the same way. Digital projects launched by women remain specific to a majority of respondents - especially women!

## 1. Digital eases the path for women in the workplace: A widely held opinion

The idea that digital is an asset for women has definitely taken hold. 74% of respondents believe digital technologies have eased the path for women in the workplace. This opinion is shared by both men and women.

Qualitative feedback from respondents shows digital technologies are often perceived as a way to circumvent traditional barriers women face in the workplace, such as the difficult conciliation of work and family life, or the lack of a professional network. Because they favor work-life balance (working from home, connecting with family during business travel...) and facilitate access to information and networks, digital technologies are becoming powerful allies for women at work.

But digital is also seen as an opportunity to emphasize women's specific qualities in the professional sphere.

**"More collaborative values encouraged by the digital economy have helped female integration at work."**

**"Digital gives a new platform for women to showcase their skills."**

Respondents

When broken down by professional positions and geography, the results show that entrepreneurs (81%) and corporate managers (74%) are the strongest believers in the support of digital technologies for women in the workplace. Americans are also more confident (81%) in the ability of digital technologies to support women than Western Europeans (71%). One can assume the most "digitally mature" people are also those who have experienced the positive effects of digital technologies, and are therefore more inclined to consider them useful for gender equality.



**BEGINNING.**

# Julia Mouson

Founder of [elueslocales.fr](https://elueslocales.fr)

**"Transparent and disintermediated, digital offers vast opportunities for women to express themselves, and therefore to get started!"**

CEO, professor at the national school of administration (ENA) and graduate from the Polytechnique engineering school, Julia Mouzon began her career at the Ministry of Finance. In 2012, motivated by the desire to encourage women in their accession to power, she founded Women & Power, then the Internet website [Elueslocales.fr](http://Elueslocales.fr).

**“The political world is still hostile to women, who must continuously prove their legitimacy. But digital removes the codes.”**

**Why did you choose to create your business in the political environment?**

Even though the 2001 parity law has rejuvenated our political class (100,000 out of 250,000 women elected in France come from the parity laws), the political world remains one of those in which the stakes of women's access to power are the most important. So there is a need to change things, but also a lot of will: it is a tremendous opportunity!

**Do you think digital makes it easier to develop entrepreneurship?**

Getting into politics is also a form of entrepreneurship! The political world traditionally operated through networks and co-optation. Today, digital tools contribute to transparency and disintermediation, so they are real facilitators for women. For a long time, women have been less encouraged and trained to take power. They can now become more independent and raise their profile with citizens.

**You evolve in a very masculine environment.**

**Do you think it is more difficult for a woman to impose her leadership?**

It is not necessarily more difficult to impose your leadership when you are a woman, but it is difficult not to be classified as a woman! Look at politics: women, especially media personalities, are scrutinized, judged and evaluated. Nothing is spared! Nor forgiven. If you are authoritarian, you are called aggressive; if you are gentle, you will be considered too soft. Everything is playing against you!

**What advice would you give women, especially given the opportunities offered by digital technology?**

Take risks! In life, you have to begin, test, see what works, what does not, and adapt. Women are even more obliged than men to question themselves in order to move on.

For digital, seize the opportunities! Digital makes things easier; that's why I think more and more women are going to seize it. Digital offers a breeding ground for women's expression. It is an open door to a vast field of possibilities, both from a technical point of view and for communication.



## 2. Still, gender matters

Women have indeed embraced digital as a source of opportunity to launch projects and startups - and they are successful. Some recent figures about entrepreneurship speak for themselves. Though women are still rare in the digital entrepreneurship sphere (Germany and Spain are lagging behind the US and France, with less than one out of six entrepreneurs a woman), women starting their own digital startup are often more successful than men. The *Harvard Business Review* recently argued that in the US 63% of female-founded companies outperformed male-founded startups in terms of market valuation growth since first round investments<sup>2</sup>.

One could expect this type of result to reinforce women in the idea that they are playing on equal terms with men in the digital economy. And yet, women still take a gendered look on their own digital practices. When asked if the startups or digital projects launched by women are different to those launched by men, 72% of women answered yes, while only 56% of men did.

Interestingly, the difference lies in the “how” rather than the “what”. For those who consider women's projects as specific, the main differences stem from their managerial approach (33%), and the way they promote themselves on projects (24%). It is therefore above all a question of attitude. The way of understanding the customer experience (21%) and the

offering of products and services (20%) are considered secondary reasons. The responses from both men and women to this question are particularly coherent resounding. Their analysis is the same.

There are nuances, however. Gender determination of entrepreneurship is viewed differently across regions. The majority of Western Europeans think women-led projects are different (71%), when only 48% of North-Americans do. In Asia, it is overwhelmingly considered (93%) that gender matters in entrepreneurship. Stage-of-life also has an impact. 77% of women between 36 and 50-years-old consider women's projects to be different. In comparison, only 69% between 26 and 35-years-old and 67% over 51-years of age think this. In the middle of their career, when they are the most invested, women are more sensitive to the issue of gender and the specificity of women-led projects.

Believing that women's projects are by nature different is not a problem in itself. But it can become one if it comes down to the confinement of women in certain sectors where they feel legitimate. In this respect unfortunately, reality follows representations: 63% of women who start a startup choose the e-commerce sector and only 16% the software or the IT<sup>3</sup>.

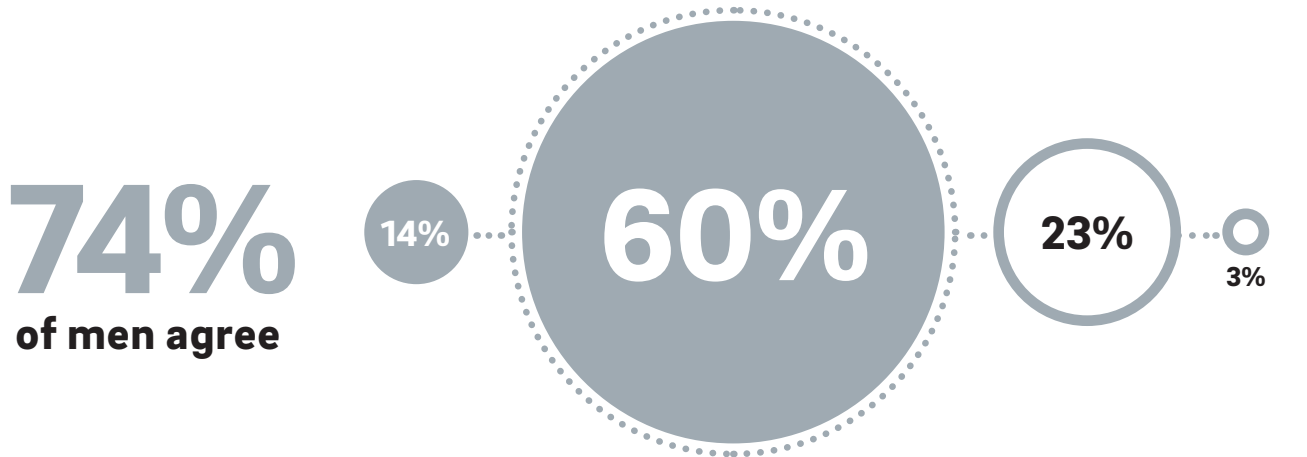
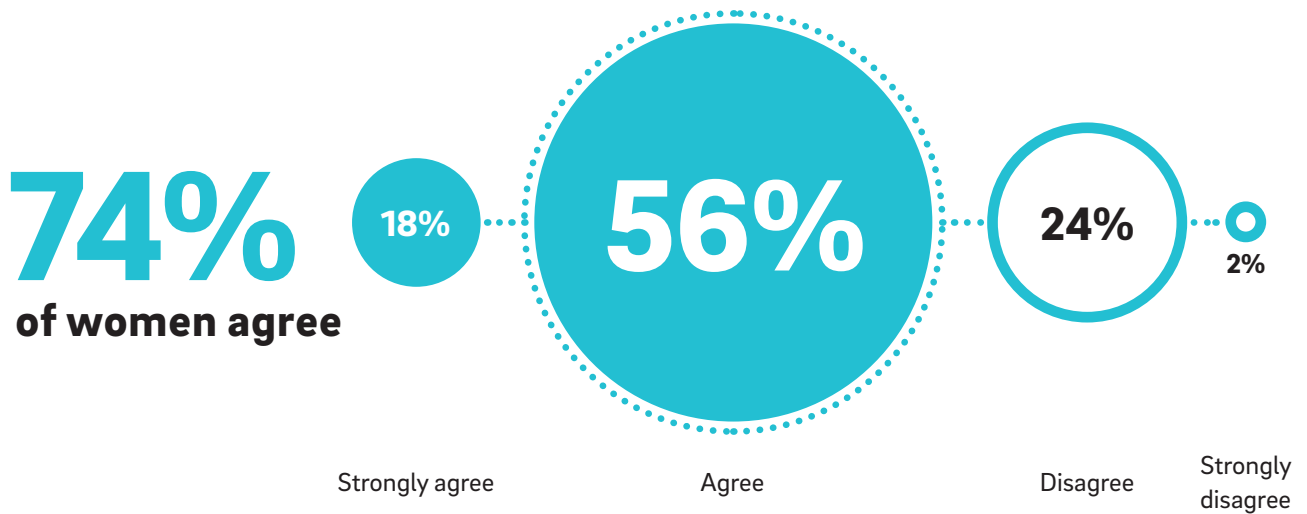
<sup>2</sup> “4 Factors That Predict Startup Success, and One That Doesn't” Tucker J. Marion, Harvard Business Review, May 03, 2016

<sup>3</sup> National Center for Women and Information Technology (NCWIT) : Women in Tech: The Facts (2015-2016 update)



Do you believe that digital technologies have eased the path of women in the workplace?

---

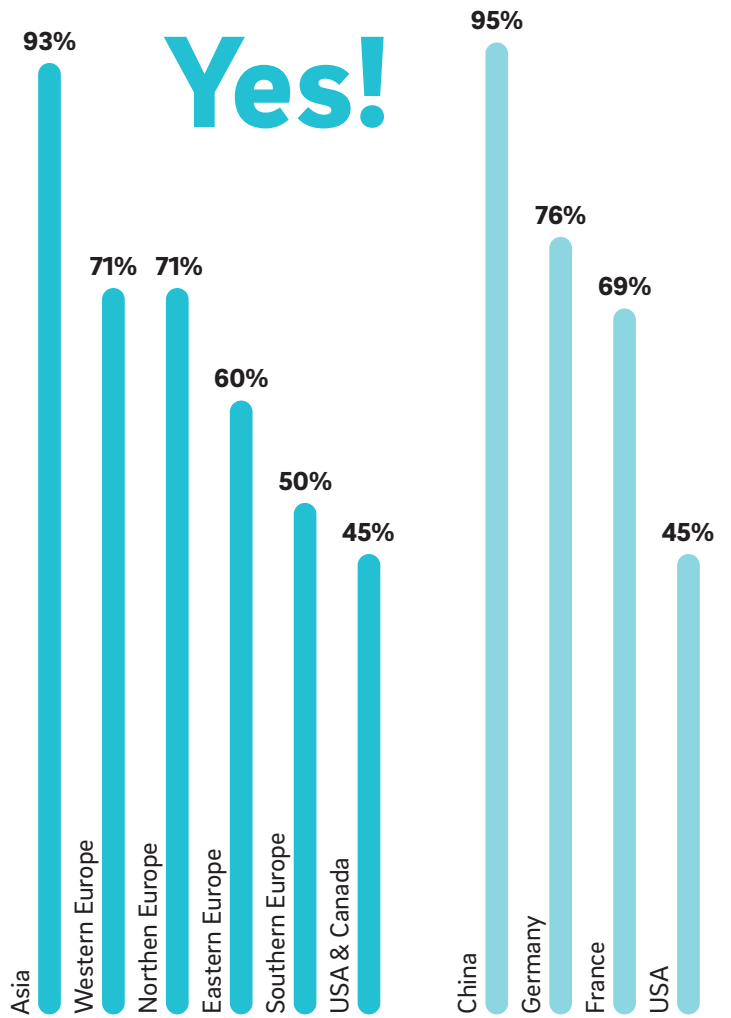
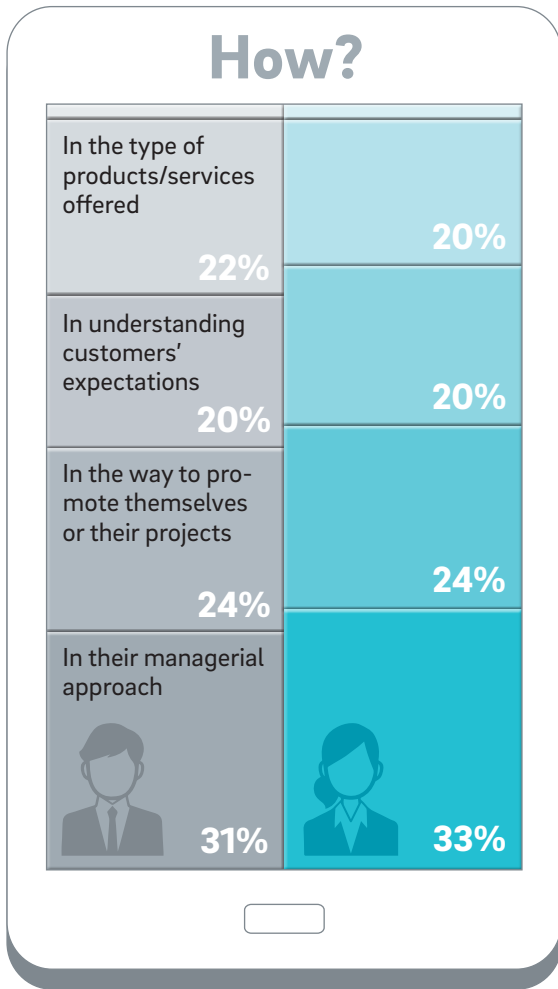




“We need to bring more women into the digital industry. Targeted education programs should therefore be a key priority. Schools, universities, professional education and of course companies must take action so that women can take their fair share of the digital revolution.”

**Oliver Samwer**  
CEO of Rocket Internet AG

**Do you think that startups (entrepreneurs) or digital projects (intrapreneurs) launched by women are different from the ones launched by men?**



Others: 2%

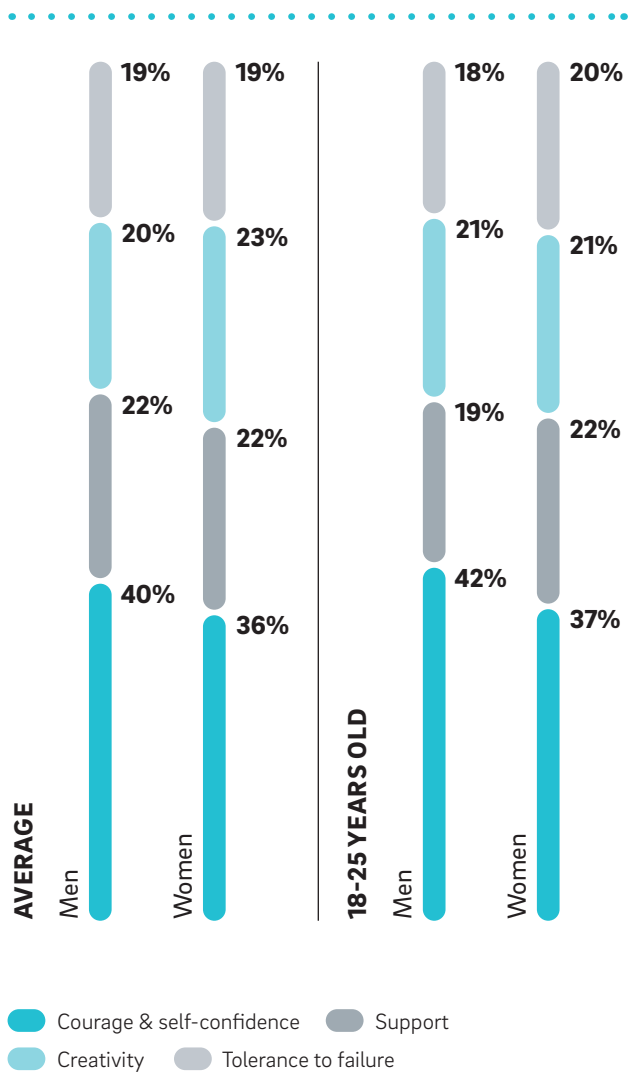


### 3. Young women express greater need for support when starting a project

When asked “what the key factor for success in becoming an entrepreneur is” - both men and women stated courage and self-confidence first. But when broken down by age, the results show a greater sensitivity when it comes to support for young women. 22% of young women said support is a key success factor, compared to only 19% of young men.

The issue of support is central to women, who often lack resources more than men, especially when it comes to accessing coaching, mentoring, and more generally developing a network that can help them and support them during their project. More focused on maintaining the work/family balance, they do not develop their network out of work.

### Today, what does it take to be an entrepreneur / intrapreneur in the digital world?





**BEGINNING.**  
**Lu Li**

Founder of Blooming Founders (UK)

**"75% of female start-ups are solo-founded,  
vs. 30% for men."**

Based in London, Lu Li is a serial entrepreneur and the founder of Blooming Founders, a business social network and support community for early stage female entrepreneurs.

**“Solo-founded companies are known to be more risky and attract less funding. Digital can be a powerful lever for women to overcome the risk of isolation in entrepreneurship. This is what Blooming founder is aiming at.”**

#### **How was the Blooming Founders project born?**

After several years in consulting, I wanted to start up something by myself. I started solo like so many women and failed twice. That’s when I realized that I should not be doing this alone and I decided to create the infrastructure for a female entrepreneur support network. I saw the potential for it when I moved to London which had an increasing number of female start-ups. Blooming founders is about providing the infrastructure for a female founder support network to grow. One to one support is not scalable, which is why I decided to focus on an online infrastructure to support the creation of a network. I also wrote a book *Dear Female Founder* that is a collection of letters from women entrepreneurs because I could not find many female role models. I strongly believe in the motto “*You can’t be what you can’t see*” so I wanted to show aspiring female entrepreneurs that others had been on this journey before them.

#### **How does Blooming Founders support women?**

75% of female start-ups are solo-founded vs. 30% for men who usually prefer to go down the entrepreneurship road by teams of 2 or 3. Solo-founded companies are more risky for investors because there is only one person doing everything. Consequently, these companies tend to attract less funding. The community created through my infrastructure is able to crowdsource answers through the group for their questions, and enables skill-pooling. It helps overcome the solo-founder trap, a huge risk for female entrepreneurs.

#### **Do you think that startups launched by women are different from the ones launched by men? And if yes, is it good news for women?**

I think most differences between startups founded by women and those founded by men are related to education. In Britain over the past few years, the number of female STEM graduates has decreased in the UK. The consequence is that there are less deep tech start-ups that are launched by women. But it is not all about education. It’s also the way women are brought up. And for instance, girls and women are incentivized to have a zero-risk approach, which is contrary to the entrepreneurial spirit.

On the other hand, women are generally more comfortable with social media and putting content in the social sphere. Indeed, many start-ups launched by women are digital in the fields of e-commerce. Digital should be a way for women to leverage their strengths.

# Digital equality?

**EVOLVING.**

# Does digital help women move forward?

To progress professionally, women can definitely count on digital. 60% of women and 61% of men think the digital transformation of companies is a source of professional opportunity for women. But is it enough? The majority think it necessary to make professional equality a corporate priority, and not rely only on digital to move things forward. In the long run though, digital is seen as an effective means to build a long-term career, find new business opportunities, grow a network, or even reinvent oneself.

## 1. Digital transformation: An opportunity for women's professional development

The majority of respondents believe that companies who have undertaken a digital transformation have eased women's career development. 60% of women and 61% of men share this view.

But some categories of believers are larger than others, for example entrepreneurs (63%) and corporate managers (62%) are more enthusiastic than non-managers (59%). This tends to prove that digital transformation benefits those who have already reached good positions and are already empowered. Making digital technologies an empowering tool for everyone, not only managers and high level executives, is therefore a challenge.

In terms of geography, the positive perception of digital transformation on gender equality is tied to women's inclusion in the ICT<sup>4</sup> industry in general. Again, the more acculturated to digital, the more inclined one is to perceive its positive impacts. We could say about digital transformation: **Try it and adopt it!**

### Women

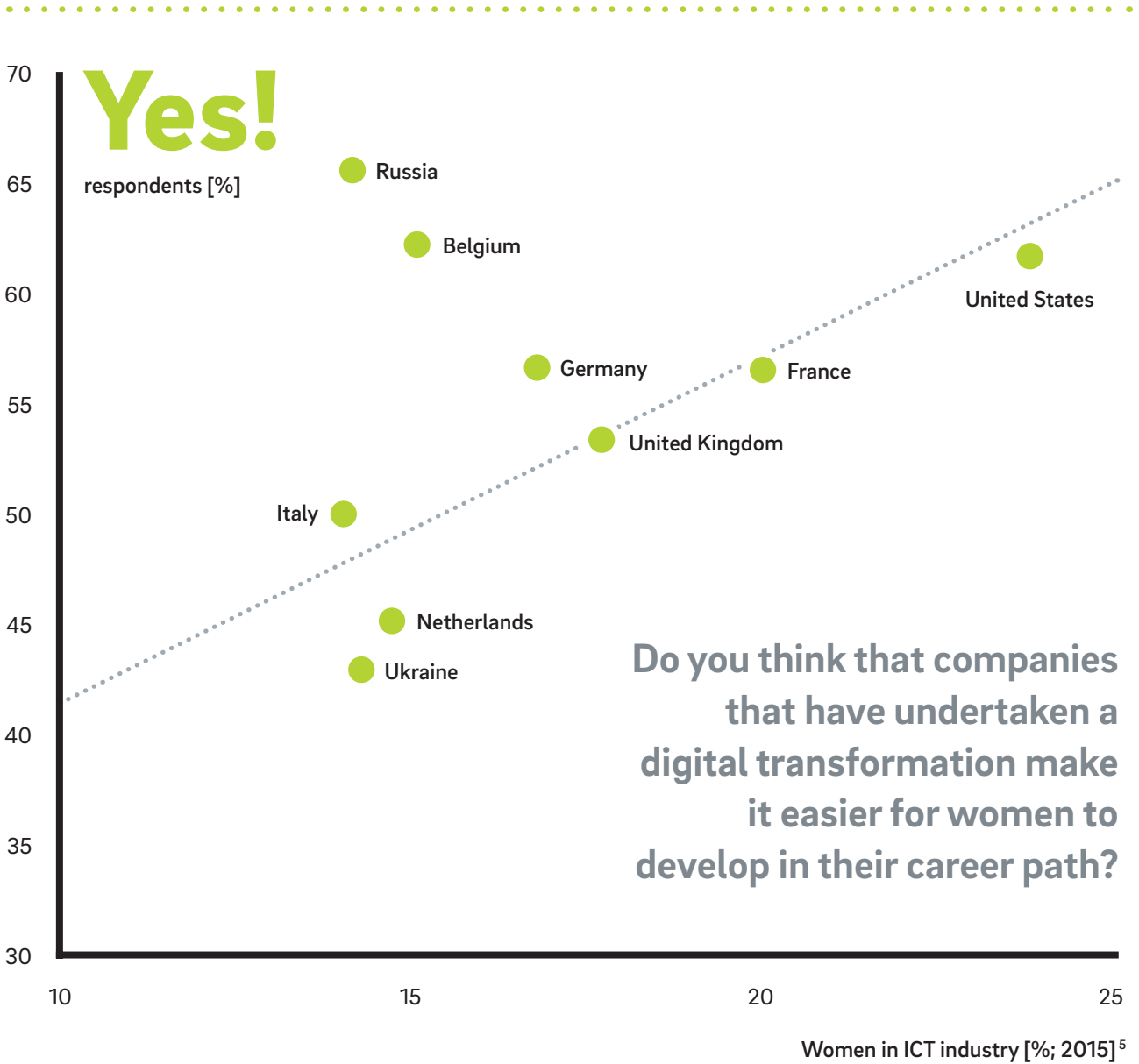
60%

think that companies that have undertaken a digital transformation make it easier for women to develop in their career path.

61%

of men agree

<sup>4</sup> Information and Communications Technology



<sup>5</sup> Eurostat, US Census Bureau, hh.ru





“Digital transformation is the future of equality between men and women. This is a great opportunity to accelerate the diversity agenda. We need to seize it to change the future.”

**Delphine Remy-Boutang**

Co-founder of JFD, founder of the bureau and of the JFD Connect club



A black and white portrait of David Lacomble, a man with short, dark hair and a light beard, wearing a dark leather jacket. He is standing in a modern interior with a large, geometric, sunburst-like structure behind him. The lighting is dramatic, highlighting his face and the texture of the leather.

**EVOLVING.**  
**David Lacomble**

President of the Think-Tank "La villa numeris" (Paris)

**"In the company, digital enables women  
to regain power."**

David Lacombed is the president of the think tank La Villa Numéris, whose mission is to promote the digital economy. He is also President of IAB France and until recently was Delegate Director for Content Strategy for the Orange Group. Fervent advocate of a fair representation of women in the governing bodies, he established a strict parity within IAB France's board of directors.

**“Digital makes it possible for women to create networks, and also transforms the culture of companies, which then need to move away from a purely masculine mode of management. After that, it's up to them to jump in!”**

**Where does this very strong commitment to gender equality come from?**

I have four children, two boys and two girls. I find it unfair that the only advantage my daughters enjoy is to live longer than their brothers! Being a woman in a country like ours is a disadvantage and I think it is important that men commit themselves to this fight, along with women. If the two parties engage for parity, this engagement becomes a cause; if they do not, women can always be criticized for lobbying for their own benefit.

**Is digital a career development facilitator for women?**

Digital is a factor of liberation because it allows women to regain power. Firstly, it offers them the opportunity to create and animate their own networks. Digital also conveys values and modes of operation traditionally considered feminine, for example intuitiveness, simplicity, ergonomics and

multitasking. Women therefore have all the opportunities to prosper there.

On the digitization of companies as such, it also facilitates the career of women. Because digitization brings a new culture and new ways of managing, it also creates new expectations with regard to the know-how of a manager. The way women work is a perfect answer to what companies need today: innovation, a great capacity for openness, collaborative management based on listening and influence. The opposite of the “Jupiterian” and top-down power typical of a dominant male, which is not adapted to a world in which the company is no longer just a hierarchical organization, but a co-construction with partners, employees and customers. Women also accept the sharing of their power; which is rarely the case when it comes to men.

**Does digital transformation create new career opportunities for women?**

Yes, but they often have a syndrome of illegitimacy in the opportunities that are available to them and a time of hesitation. They must be encouraged to fully assume their prerogatives in companies. They need to be pushed beyond their limits, by role models, testimonies and exemplarity.



## 2. Digital alone can't stand on its own

Most respondents are aware that relying on digital transformation is not enough to promote gender equality in the workplace. Women overwhelmingly believe gender equality should be a corporate priority. 81% say it should be in the top 5 priorities for a CEO. Men are also convinced that gender equality should be a priority, but only for 62% of them. Men and women generally agree, but their degree of belief is not the same. And this gap widens over the span of their careers. In the 36-50 age group men are convinced to 58 and women to 82% - reaching a gap of 24 points.

For women, not only should gender equality be a corporate priority, it must also be closely monitored. They strongly support (75%) the implementation of gender equality key performance indicators (KPIs). In other words, they don't want to rely on good will alone. The number of men in favor of gender equality KPI is lower, but the majority (60%), are in favor of KPI implementation. 37% of women and 29% of men think KPIs should primarily monitor internal promotions and performance review, rather than employee attitude.

Not surprisingly, geography makes a difference. North American respondents are less convinced of the importance of setting up KPIs (69%), while Western Europe is the most favorably inclined region

(75%). "Latin" countries favor quantitative indicators, whereas the US focuses more on attitude, and less on quantitative metrics to boost gender equality.

.....

**Women**

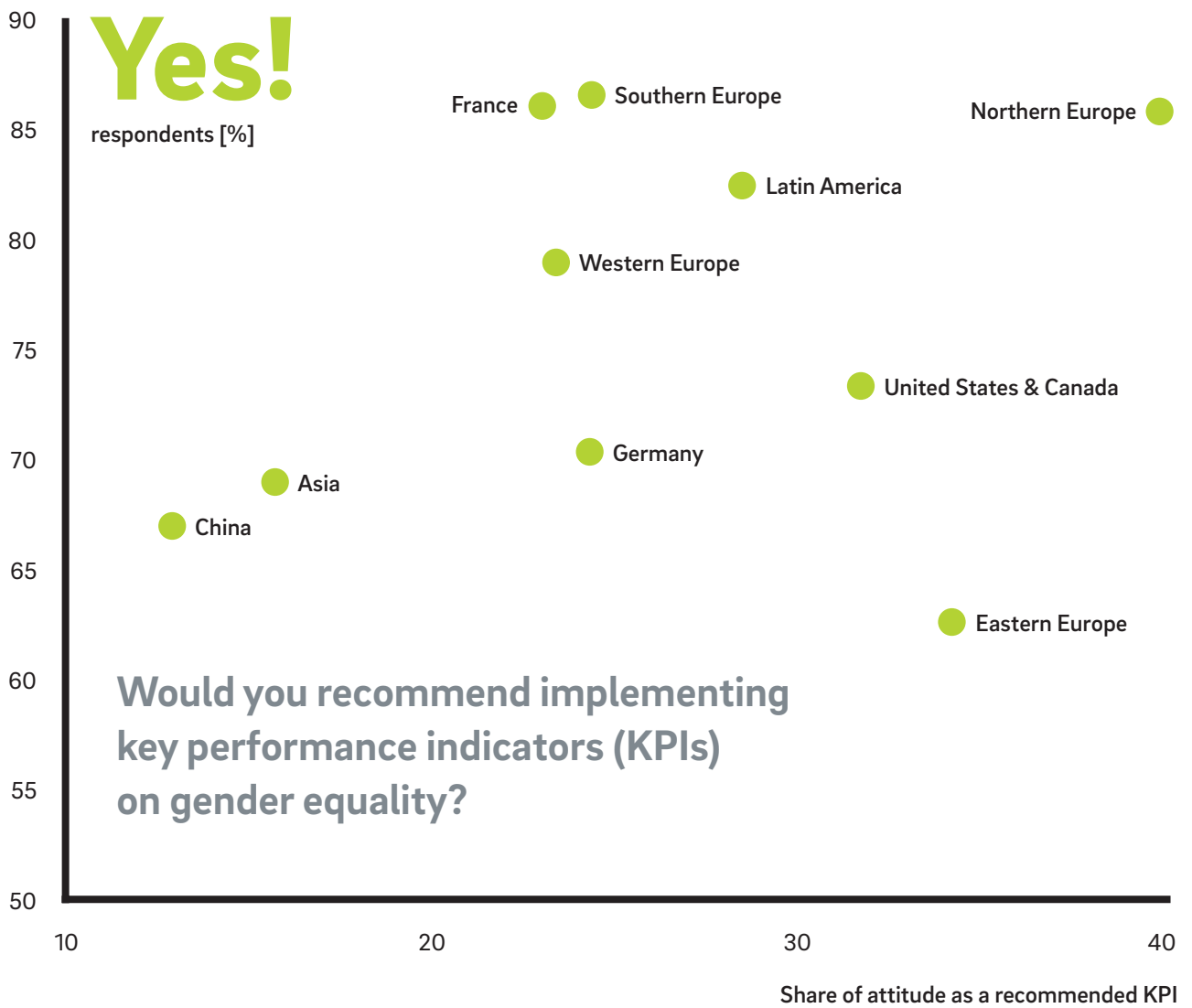
**75%**

would recommend implementing key performance indicators (KPIs) on gender equality.

**60%**

**of men agree**

CEO should have gender equality as their top 5 priority







**EVOLVING.**

# Guy Mamou-Mani

Vice-president of French National Council of Digital  
and founder of #JamaisSansElle

**"Quotas are only a part of the solution  
to more gender equality in the workplace:  
Women also need to change their own minds!"**

Guy Mamou-Mani co-chairs the group Open with Frédéric Sebag, supporting the digital transformation of French companies. He is also Vice-president of the French National Council of Digital. He created the French movement #JamaisSansElle, which aims to not provide assistance to French meetings if there is not at least one woman in the assembly.

**“Women are blocked in their career path due a prevalent chain of censorship. We have to break the codes in organizations to promote gender equality, but women also need to break theirs!”**

**Where does your commitment for gender equality come from?**

First of all, digital is an industry where we are strongly looking for talent in terms of quantity. To find more talent, women have to be available as candidates, in order to enrich the digital industry and improve digital prospective. When I chaired the French organization Syntech Numérique there were only 15% of women working in digital! While on my part I deeply believe in diversity: there is nothing worse than a room full of men developing their projects and making sexist jokes. Naturally, I don't think men and women are strongly different. Nevertheless, I can't prevent myself from admiring how women can do two things at the same time. I also think that women act less from their ego and in the end, they don't bring themselves forward. It doesn't serve their interests, or ours!

**According to you, is there any difference between the projects launched by men and women?**

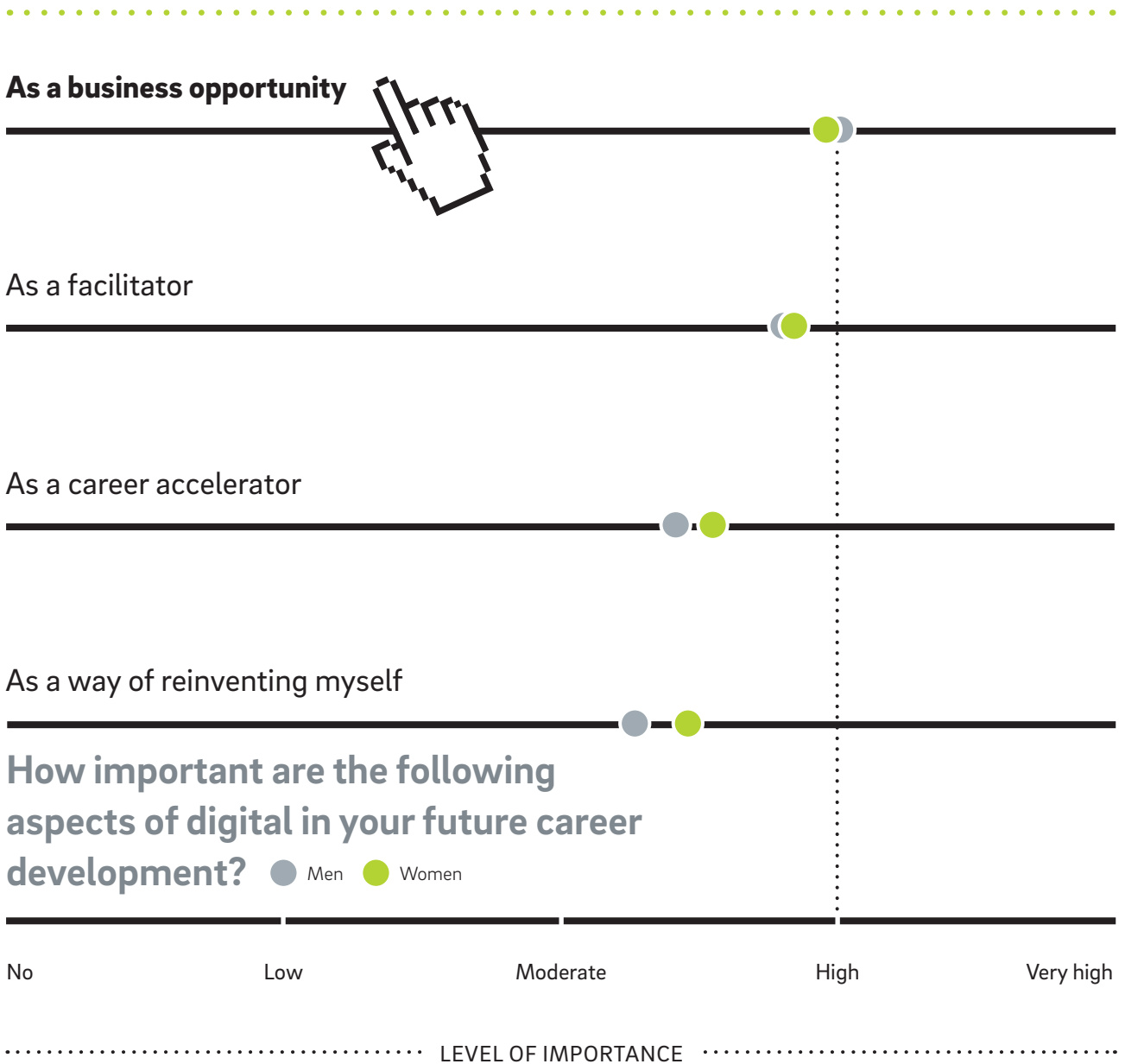
Digital brings in a difference in the workplace whether you are a female or a male, and takes part in changing minds concerning working behaviors. Digital has given women a great opportunity to reduce distance and makes presenteeism meaningless. These new habits are leading to professional and social balance for everyone. We have all gained more independence thanks to digital: one week you can work for 20 hours and the other one for 50 hours. The workplace has become oriented toward results rather than tasks. Digital induces transformation, no matter the industry or the gender. La Journée de La Femme Digitale #JFD17 belongs to this general movement in favor of change perceptions.

**What do you think about female leadership?**

**Is it for you something different than male leadership?**

Leadership is wrongly conceived because of structural stereotypes: we have to stop saying to ourselves that a woman can't be a leader. There is no such thing as female skills or male skills. There are too few women leaders because there is a whole chain of censorship from parents, teachers, young people, and girls themselves. We have to break the codes and create a new workplace outside the pyramidal hierarchy, which completely excludes women. So for women to become leaders is the policy of quotas the best solution? A part of me realizes that we have to go through this to look forward. But another part of me believes that it also has to come from women themselves. They have to start by changing their own minds. I take part in a lot of conferences but organizers hardly find women speakers!





### 3. Planning the next move: Digital paves the way

Men and women are fully aware that their professional success is not only built within the company for which they work. 93% of women think professional networks are essential to their career development. They are thinking of their next move, and digital can be very helpful for that.

When asked how digital may help them in the future, women (72%) think of business opportunities first, as do men (73%). Digital as a facilitator then comes next for both women and men. But women are more confident than men in the idea that digital may help them reinvent themselves (55% versus 45%).

**Women**

**72%**

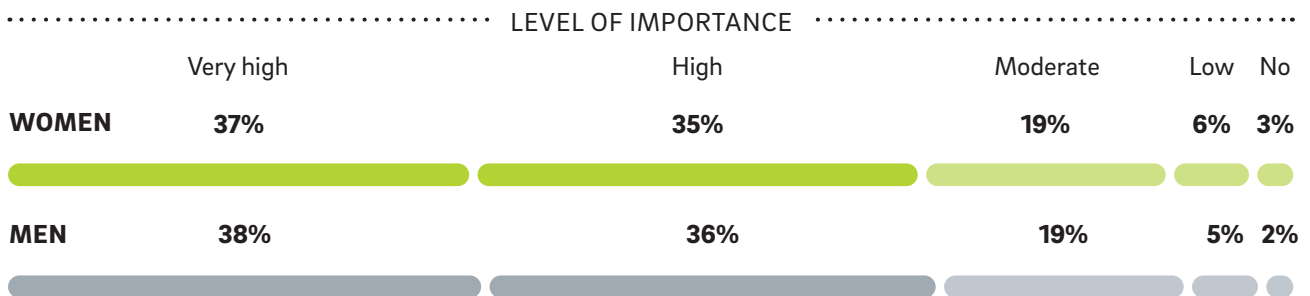
**think of business opportunities first.**

**73%**

**Men**

#### Digital for career development

## Business opportunities first!



**“One of the most important aspects of digital is its effect on the corporate culture. Digitalization makes communication processes faster and easier and provides opportunities for remote work and better work-life balance management, which is in favor of working women. At the same time, digital culture changes the team dynamics – competition is being replaced by team-work focused environment where women, being more sociable than men and having more emotional intelligence, can better reveal their strengths.”**

Margarita Kucherenko, CEO, RT-Roznichnye Sistemy (leading Russian telecom company)



**“Focus of the existing female professional networks should be moved from a simple demonstration of some women’s successes to a proactive development of succession. There are already many female leaders that can inspire and share their experience and know-how with their younger colleagues and topic of the female leadership should be part of the agenda of corporate events and internal and external communication.”**

Ella Sytnik, Managing Partner, Ward Howell

“Companies that have undergone digital transformation have changed their business approach and have made their approach to evaluation more objective. They have more flexible mentality, which favors women both on the recruitment step and during their career development.”

Vasilina Vdovina, CEO and co-founder, LeadsScanner (potential clients search in social networks)



**“Given that digital is still recent, we need more time to achieve the required cultural change: culture still need to evolve.”**

Tamara Leemans, CTO at Voo

“Women do things differently. In these economic times, where organizations are flat and more diversified, female competencies are more successful to manage a company.”

Saskia Van Uffelen, CEO of Ericsson Belux



"It is important for women to have a sponsor within their organization to support them and help to open doors. Some people are used to work in a stereotyped approach. This is very hard to break."

Tamara Leemans, CTO at Voo

**"Digital it is more than technology. It is about transformation and the creation of a new operating model, where real and virtual worlds come together."**

Saskia Van Uffelen, CEO of Ericsson Belux

**"Women entrepreneurs have a different managerial approach and are more oriented towards end customers, focusing on developing products or services that will really serve them."**

Anne Collet, Le Wagon founder

"Women tend to be more risk averse, they expect a significant number of training and information before considering making a first investment."

Claire Munck, CEO and administrator of Be Angels

**"DIGITAL EASES THE ROAD TO ENTREPRENEURSHIP FOR WOMEN, AS IT ENABLES TO TAKE THE STEP BY TAKING ON LESS RISK."**

Tamara Leemans, CTO at Voo

**"Digital enables the creation of a new operating model, where real and virtual worlds come together."**

Martine Tempels, senior vice-president business at Telenet

"The communication style and empathy that tend to be more female competencies are enablers to successful collaboration of teams."

Saskia Van Uffelen, CEO of Ericsson Belux

# Digital equality?

**LEADING.**

# Does digital help women access leadership positions?

So far, men and women have generally been in agreement. Differences were of degrees, not nature. But this is no longer the case when it comes to the question of leadership, where opposing views often arise. While professional equality has increased over the past few years in mid-management positions, many women find C-level positions remain difficult to access – a belief men disagree with.

But women remain confident, believing digital will help them fight gender bias and aid them in progressing professionally.

## 1. Access to C-level positions: Still a pain point

53% of women think men and women don't have equal access to top management positions. Men strongly disagree - 66% think women have the same opportunities as men.

The most optimistic are, logically, those who have already reached a certain level of seniority and responsibility. Managerial positions are associated with higher confidence in the regard that men and women have access to equal opportunities. Only 47% of professionals with managerial positions think access to top management positions is unequal (vs. 53% for non-managerial positions). Non-managers are the least likely to think that women have equal access to top management positions.

But geography matters too. Western Europeans (54%) strongly feel that women are discriminated against on their pathways to success, along with Southern Europeans (51%) and Latin Americans (65%). Surprisingly though, at a national level, the share of women sitting at the boards of large companies does not seem to impact perceptions on women's access to leading positions.

.....

**Women**  
**No!** 53%

**In your organization, would you say that women and men have equal opportunities to access to Top Management positions?**

**Men**  
**Yes!** 66%



<sup>6</sup> European Commission: Women in decision making database, Spencer-Stuart, Deloitte, Forbes

## 2. Digital's potential to counter gender bias

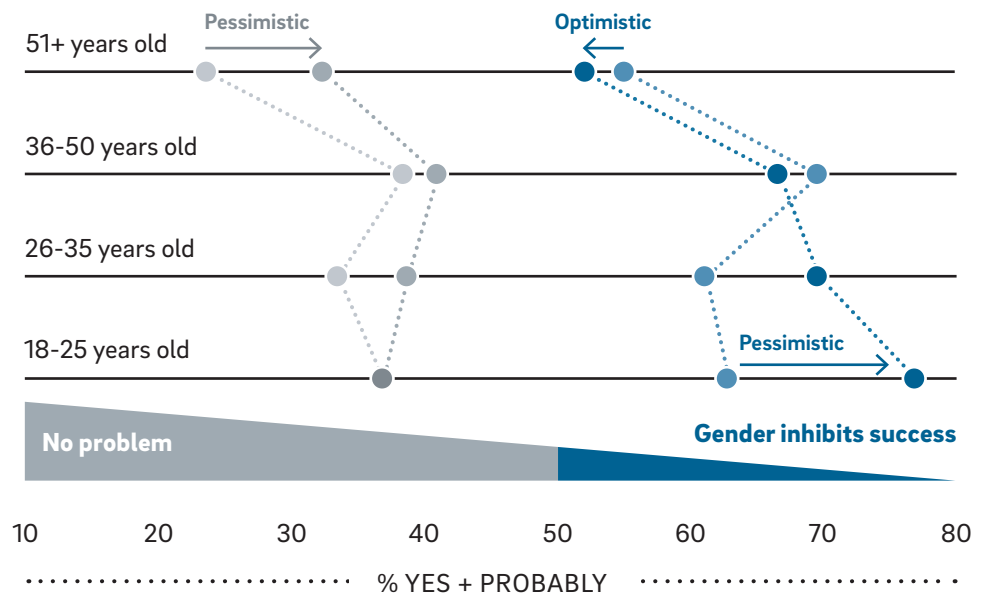
64% of women think their gender has probably or certainly inhibited their professional success (34% of men also think their gender has inhibited them). But they are more and more optimistic about the future as they grow older, whereas men follow the exact opposite logic. There is a constant divide between men and women on this question. At least one out of every two women believe gender stands in their way of career success, compared to a maximum of 40% of men. In the meantime, women trust digital to help them fight gender bias. 59% of women who think

they have been hindered professionally because of their gender also think that digital technologies have supported them. This proportion is higher for corporate managers (60%) and entrepreneurs (68%).

And they are confident about the future as well. 74% believe digital will positively contribute to greater success. Women are, in general, more optimistic than men about the positive impact of technology on their career. There is one moment in their career, however, between 36 and 50-years-old, when they are more pessimistic than men. This is a key moment in a woman's professional development, when challenges are the greatest, and the path to the top seems the hardest, which may explain this fading optimism.

### Is your gender inhibiting your success – in your experience to date and in the future?

- Women**
- In the past
- In the future
- Men**
- In the past
- In the future

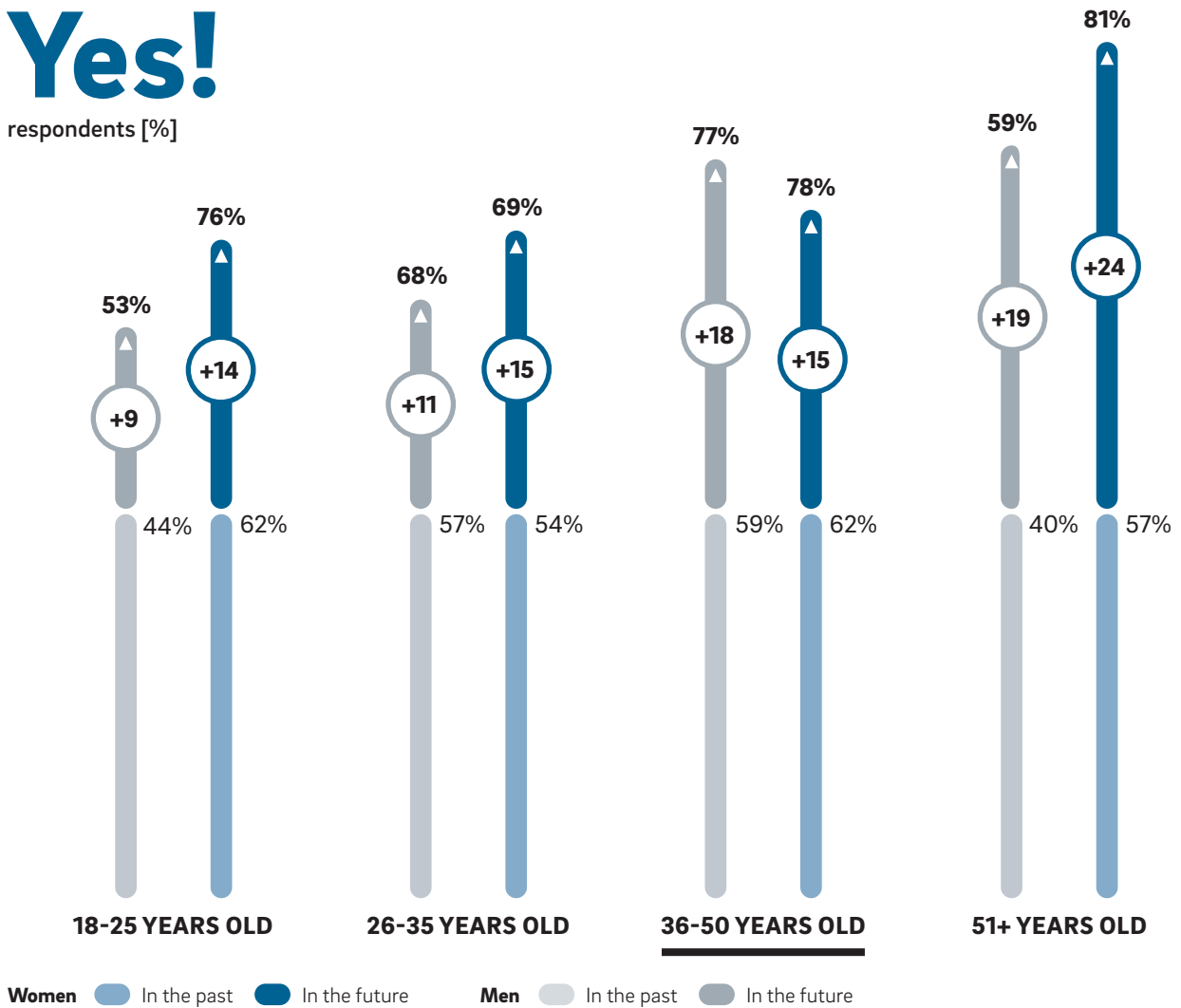




If your gender is inhibiting / will inhibit your success, have / will digital technologies positively contributed to your success?

**Yes!**

respondents [%]



### 3. Women have their own part to play in the digital revolution

Do women have a specific part to play in the digital revolution? Will they be key players? 73% of women and 61% men certainly think so. Western Europeans are significantly more confident (70%) in the role of women in the digital revolution than Americans (62%). The more a country believes there is no gender equality, the more it believes the rules of the game will change in the digital era.

These results are double-edged. If women expect more than men from digital, it is because they are aware that they still have a long way to go before they have the same opportunities. Similarly, the belief that women have a specific role to play in the digital revolution is stronger in countries where women feel they are lagging behind men. The awareness that a situation can and must change gives hope and energy. There can be no doubt that digital holds the potential to bring about transformation when it comes to leadership issues.

**"For too long, digital was the domain of male nerds who think more about their technology than their clients."**

.....

**Women**

**73%**

**think that women shift (own and transform) digital.**

**61%**

**of men agree**

**"Creative and driven people own digital, not a gender related topic."**





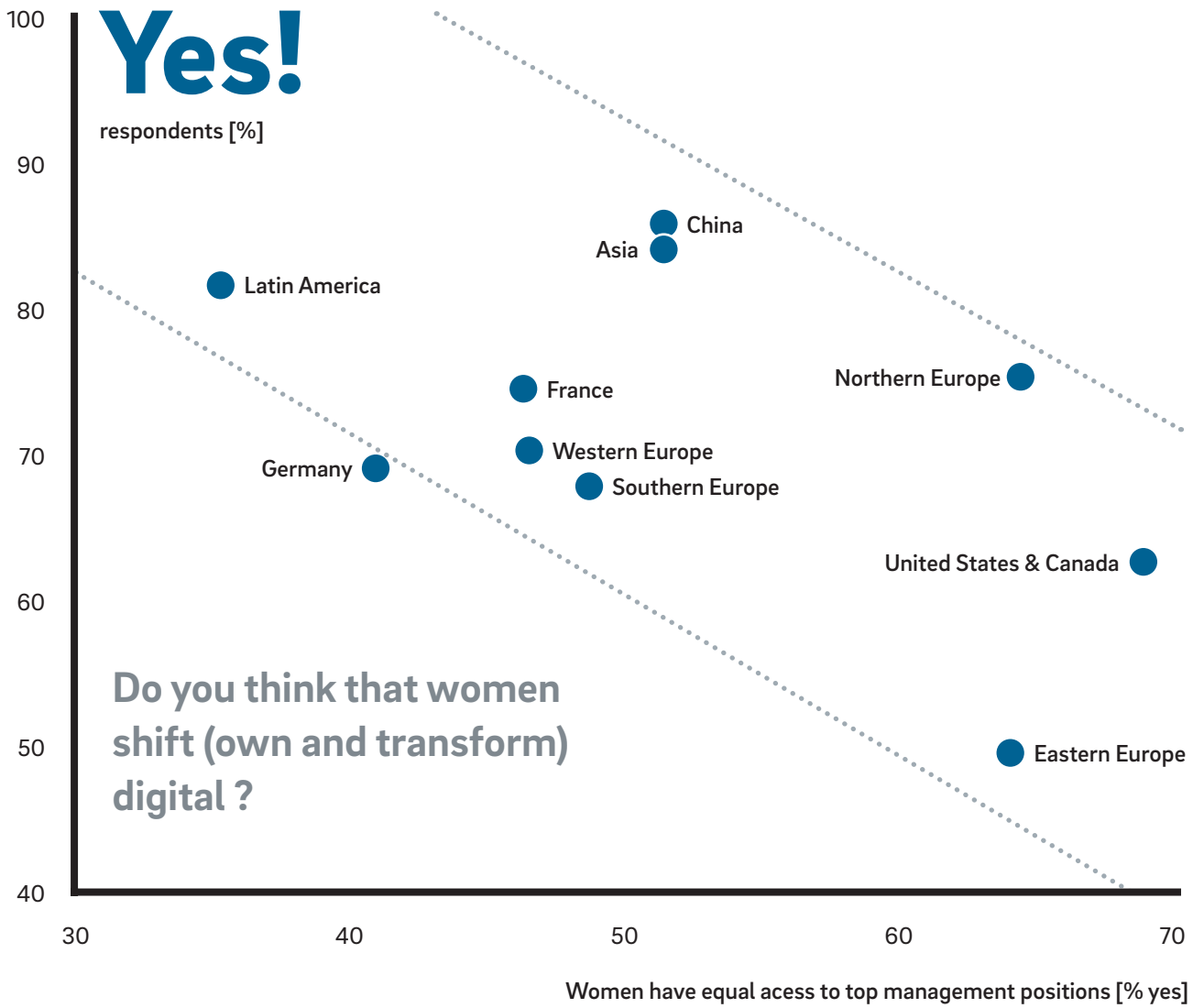
“What seems to work best for me is to learn from the past, not live in it. Never let fear get in the way! Don’t be afraid to continue even when things appear to be impossible, even when the so-called ‘experts’ say it is impossible. Don’t be afraid to stand alone, to be different, to be wrong, to make and admit mistakes; for only those who dare to fail greatly can ever achieve greatly.”


**Margaret Hamilton**

Computer Scientist awarded the Presidential Medal of Freedom by U.S. President Barack Obama for her work leading the development of on-board flight software for NASA's Apollo Moon missions.



Women shift digital





“The digital woman is a reality and an asset for the future of leadership. Let’s not get stuck with gender stereotypes.”

**Anne Bioulac**  
Senior Partner, Roland Berger





**LEADING.**

# Aurélie Jean

Computational Scientist, CEO and founder of In Silico Veritas

**"With coding, everything is possible!"**

Aur lie Jean is a computational scientist. After 7 years pursuing her research in computational biomechanics at Pennsylvania State University and at MIT, she is now a senior software developer and scientist at Bloomberg in NYC. In 2016, she founded In Silico Veritas, to sensitize both companies and people to the challenges of digital and the importance of coding. It aims to raise awareness and attract women to this sector.

**“Girls too often want to circumvent the technical dimension of digital. They perceive it as too complicated and not sexy enough. But this is where the salaries and jobs of the future are.”**

**What skills do companies need in the digital transformation process?**

At In Silico Veritas, I have begun to have requests from companies about what digital transformation really is and how it becomes digital-analytical. What technical skills will we need? For example, marketing that has become digital marketing, now also becomes analytical. It requires knowing how to truly manipulate data. Most often, the technical knowledge of the marketing departments on the subject remains very superficial. We must demystify and democratize all of this and find a way to simplify what is complicated.

**How can women benefit from these transformations?**

When we talk about digital, we often have in mind a culture, a state of mind... But digital is above all a set of technologies. Women are all too often presented as digital consumers. They must become producers. They need to be aware of what they can do with code. Girls too often circumvent the technical dimension

of digital. Because they perceive it as too complicated, not sexy enough... But the salaries and the jobs of the future are there.

**How to attract more women to these sectors?**

I believe in bottom-up approaches, coaching and mentoring. At MIT, in the digital mechanics research team to which I belonged, I tried to attract young women, giving them a good image of the discipline. Above all, they need to understand the potential of coding. The uses of data are exploding. I quickly realized that as a coder I could do everything, work in all sectors. After 7 years in digital medicine, I now work in the finance sector, and in the future I hope to go to other universes, sociology, agriculture... With coding, everything is possible!

**Does digital make it possible to truly reshuffle the cards between men and women at work?**

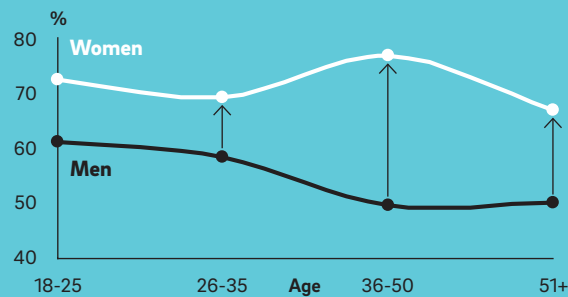
Absolutely. Since women are as well educated as men today, they can be as successful as they are. This environment has only just started to be explored. I sincerely believe that digital is a strong tool to evolve faster professionally, to have more opportunities. Coding represents the best social lift at the moment.



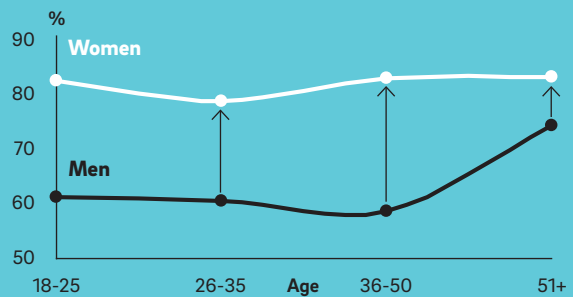
# Gender differences are exacerbated when competition for leadership is fiercest in the workplace

Generational perception of gender equality [% Yes respondents]

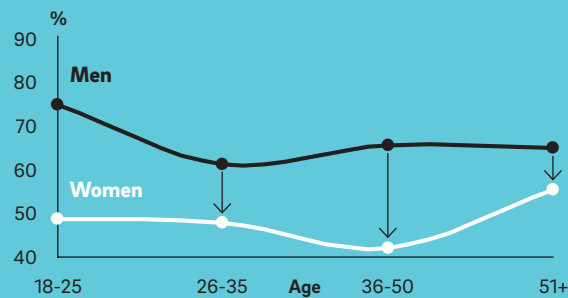
Do you think that start-ups / projects launched by women are different from the ones launched by men?



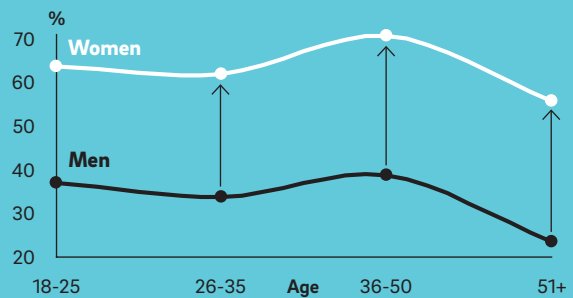
Should gender equality be one of a CEO top-5 priorities?



Would you say men & women have equal access to top management positions?



Has your gender inhibited your career in your experience to date?



Between 36 and 50-years-old the gap between male and female answers is the widest. Indeed, in this age range, 82% of women believe gender equality should be one of the top 5 priorities for a CEO (vs. 58% of men); 58% believe that women do not have access to top-management positions (vs. 35% of men) and 70% assert that their gender has inhibited their career so far (vs. 38% of men). There is a bolder perception of the gender gap between 36 and 50-years-old, when competition is at its fiercest in the workplace. Subsequently, women tend to exaggerate gender differences as

a way to express their resentment. 77% of women believe projects founded by women are different to those founded by men.

It is worth noting that women tend more to neglect the gender gap and differences early on, because they have not faced it already. But they also tend to neglect them more as they grow older (51-years-old and above), when their career is ending, and they are reflecting on what stood in their way.



---

# Conclusion

The positive effects of digital on women's working lives now seem obvious to all. Digital facilitates entry into the workforce, strengthens the place and legitimacy of women in companies, and allows the building of long-term strategies through the consolidation of networks. But the results of the study highlight a number of important issues.

The impact of digital is not so much in the transformation of the content of work, rather in its means and organization. Its benefits lie in the flexibility, openness and horizontality of the modes of work it promotes. This is an essential first step. But we must go even further and make digital become a source of new professional areas for women to explore, not just a resource to get around the rigidities of the world of work. For that, women need to invest more in the technical dimension of digital - coding, computer science, development, and tomorrow artificial intelligence. It is only in this way that they will be able to participate on equal footing with men in the technological conquests that contain the professional opportunities of tomorrow. The implementation of active policies to recruit, promote and retain women in the most promising sectors is an essential prerequisite for genuine professional equality.

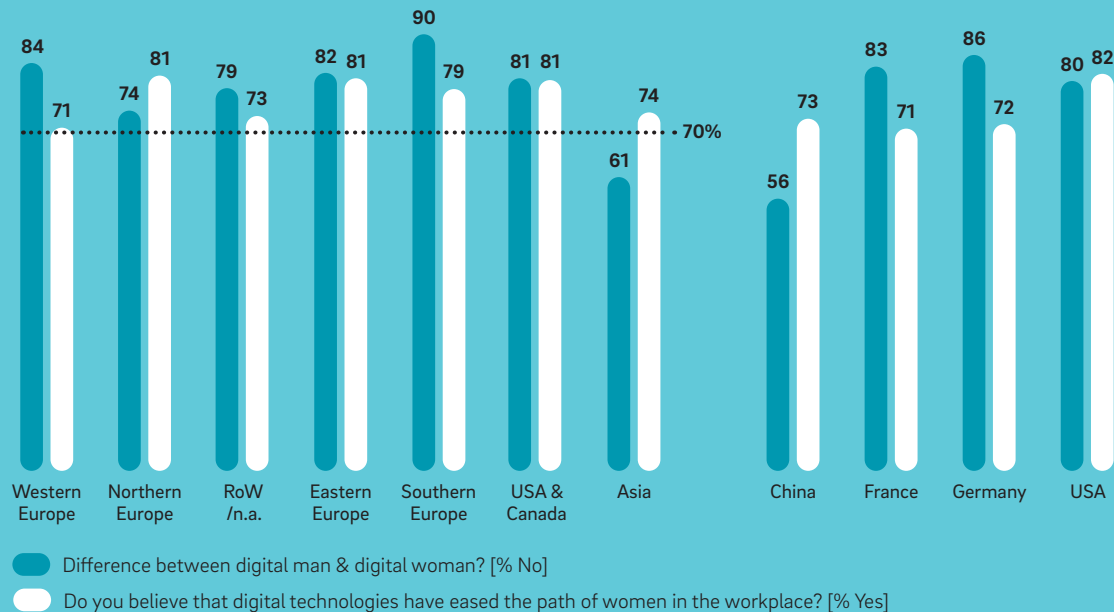
Another major take away of the study is that people who are the most familiar to digital - entrepreneurs and managers - are the most convinced of its value, and therefore those who benefit most from it. There is therefore a major challenge for HR policies to familiarize all workers with digital tools, beyond the

higher categories alone, in order for digital empowerment to become a reality for all.

Finally, the study shows that our relationship to digital is predominantly conditioned by cultural, social or economic factors. Digital is not a world apart, disconnected from the rest. It is in touch with cultures and world views that influence how we use it and what we do with it. There is no one size fits all recipe. The way American or Chinese women invest in digital cannot serve as an unsurpassable model. In every country women must invent the digital uses that will allow them to progress, in line with the culture and ideals that make up their history and strength. The field of possibilities is therefore as vast as the number of women in the world ready to invest in it!

# A global consensus in some areas - with visible cultural differences

Worldwide consensus, global perception



Overall, there was a global consensus that a digital woman is no different from a digital man from over 80% of respondents across all geographies (except China). Likewise, for over 70% of respondents worldwide, digital has indeed eased the path for women in the workplace.

However, some geographical differences, tied to cultural factors, systematically emerge. In the US, the gender gap is considered less problematic or even less salient (69% believe gender equality should be one of the top 5 priorities of a CEO vs. 79% in Western Europe; 69% think KPIs should monitor gender equality vs. 75% in Western Europe; 45% believe there is a difference between female and male-launched start-ups vs. 71% in Europe and 69% believe women have equal access to top management positions vs. 46% in Western Europe).

At the same time, the digital impact on gender equality encounters greater enthusiasm. 78% of Americans believe digital transformation enhances gender equality in a company, vs. 56% in Europe.

A more pragmatic approach is taken in North America, where digital is perceived more as a tool than a new culture. For 49%, a digital woman is primarily someone who is always connected, vs. 39% in Western Europe. In comparison, Europeans tend to view digital as a new field for women to gain leadership in. 70% believe that women shift digital vs. 62% in the USA.

Asia is characterized by both strong optimism and a very gendered view of the subject : 93% of respondents think that projects carried by women are different.

# Methodology

## The “*Digital equality?*” study relies on an online-based survey of ~3,000 people worldwide, conducted from October to December 2016.

73% of respondents are women and 27% are men.

39% are aged between 26 and 35-years-old, 25% are between 18 and 25-years-old and 27% are between 36 and 50-years-old.

20% of the panel is composed of students, 8% are entrepreneurs and 63% are employed, equally distributed between managerial and non-managerial positions.

Respondents are employed in all industrial sectors, top areas being consulting (23%), Technology & Internet (10%), Financial Services (10%) and Telecom & Media (7%).

More than 60 countries are represented in the panel, the bulk coming from Western Europe (62%), followed by North America (13%) and Asia (11%). The countries represented the most in the panel are France (33%), Germany (19%), USA (12%) and China (9%).

### Respondents nationality [# respondents<sup>7</sup>]

#### USA & CANADA

US: 12%

Canada: 1%

#### LATIN AMERICA

Brazil: <1%

Others: <1%

#### WESTERN EUROPE

France: 33%

Germany: 19%

Switzerland: 2%

UK: 2%

Belgium: 3%

Austria: <1%

Others: 1%

#### NORTHERN EUROPE

Sweden: 1%

Others: <1%

#### EASTERN EUROPE

Russia: 2%

Czech Republic: 1%

Romania: 1%

Poland: <1%

Ukraine: <1%

Others: <1%

#### SOUTHERN EUROPE

Spain: 1%

Italy: 1%

Portugal: 1%

Others: <1%

#### ASIA

China: 9%

India: 1%

Singapore: <1%

Japan: <1%

Indonesia: <1%

Others: 1%

#### REST OF WORLD

Morocco: <1%

Australia: <1%

UAE: <1%

Others / n.a.: 3%

<sup>7</sup> For countries with over 5 respondents

**PUBLISHER****Roland Berger**

62-64, Rue de Lisbonne  
75008 Paris  
+33 1 53 67 03 20  
[www.rolandberger.com](http://www.rolandberger.com)

**AUTHORS****Roland Berger**

Anne Bioulac, Senior Partner  
[anne.bioulac@rolandberger.com](mailto:anne.bioulac@rolandberger.com)

**La Journée de la Femme Digitale**

Delphine Remy-Boutang  
Co-founder of JFD, founder of the bureau and of the  
JFD Connect club  
[delphine@thebureau.fr](mailto:delphine@thebureau.fr)

**NUMA**

Marie-Vorgan Le Barzic, CEO  
[marie.lb@numa.co](mailto:marie.lb@numa.co)

**CONTRIBUTORS****Roland Berger**

Mylène Astier	Katharina Maier
Aurélie Bekaert	Anna Mangold
Henri Brebant	Maria Mikhaylenko
Astrid Bohlke	Gillian Morris
Viktoriya Bondarets	Paloma Pardineille
Rebecca Fu	Alexandra Romanova
Héloïse d'Heilly	Martin de Roux
Audrey Lacombe	Ina Wietheger

**the bureau**

11 Boulevard Delessert  
75016 Paris  
+33 1 42 15 73 85  
[www.thebureau.fr](http://www.thebureau.fr)

**EDITOR****Roland Berger**

Anne Dujin  
[anne.dujin@rolandberger.com](mailto:anne.dujin@rolandberger.com)

**PRESS CONTACT****Roland Berger**

Dephine Missud  
+33 1 70 39 41 15  
[delphine.missud@rolandberger.com](mailto:delphine.missud@rolandberger.com)

**the bureau**

Catherine Reichert  
+33 6 62 01 58 04  
[catherine@thebureau.fr](mailto:catherine@thebureau.fr)

**Agence 14 septembre**

Laura Sergeant  
+33 6 08 75 74 24  
[laurasergeant@14septembre.fr](mailto:laurasergeant@14septembre.fr)

**NUMA**

Arnaud Chaigneau  
+33 6 63 73 12 78  
[arnaud.c@numa.co](mailto:arnaud.c@numa.co)

**MARKETING, TECHNICAL  
& PUBLICATION CREDITS****Roland Berger**

Aleksandar Dzhamurov  
Eric Foynard  
Shawn Gao  
Kang Ke  
Agathe Lélou

**ACKNOWLEDGEMENTS**

Roland Berger thanks all the men and women, clients, consultants, entrepreneurs, alumni, the ~3,000 respondents, and all those who have contributed to the Women & Digital survey.



# FURTHER INFO

## About Roland Berger

Operating in France since 1990, Roland Berger is the world's leading management strategy consulting firm of European origin and boasts 2,400 employees at 50 offices in 36 countries. Our Paris office employs some 300 of them, including 240 consultants and 29 partners, and advises major French and international corporations on key business issues. Roland Berger is the creative force behind the Terra Numerata™ digital network, an open and non-exclusive partnership platform pooling skills and expertise that industry, associations and public institutions can draw on for their digital projects.

## About La Journée de la Femme Digitale

La Journée de la Femme Digitale – the Digital Women's Day – is an event co-founded by Delphine Remy-Boutang in 2013 that celebrates and connects women willing to revolutionize the world through digital. Free annual event open to the general public, the JFD aims to inspire and encourage women to dare, innovate and build. Focusing on networking, sharing of knowledge and experiences, the JFD honors with kindness the synergy of talents and the initiatives of women and men of today. Under the theme "For A Better World", the 5<sup>th</sup> edition offers to think and explore the routes to build a more creative and equal world thanks to digital.

JFD is also a club: JFD Connect. Created in 2016 by Delphine Remy-Boutang, the club gives to its members the opportunity to meet all year long and to develop their networks during conferences and exclusive events. JFD and JFD club are produced by the bureau digital agency.

## About NUMA

A major player in the digital ecosystem for the last 15 years, NUMA brings together inventors, entrepreneurs and startup founders with the aim of enhancing and showcasing innovation. With offices in Paris, Moscow, Bangalore and Casablanca, NUMA pursues three main goals: the event-driven nurturing and structuring of communities (it is the founder of the "Cantine Numérique" ("Digital Canteen") and staged 1,500 events attracting 80,000 people in 2015); the acceleration of startups (having provided such a service to 104 of them since 2011, and over 200 mentors); and the digital transformation of companies (NUMA supports one third of CAC 40 companies in their digitalization and also set up the first public/private multi-partner program) through open innovation and experimentation.



In collaboration with

