



2018 Gender Diversity Study

PESA Gender Diversity Study Overview



Pioneering study to establish a baseline of gender diversity within our sector



Surveyed 35+ companies to collect data on 250,000 working men and women



Analyzed published data regarding workforce issues related to gender diversity



GENDER DIVERSITY MATTERS

Oil & Gas and its service and supply sector continue to lag in unlocking the potential of women



Companies that commit to diversity have been shown to perform better...



48% of companies in the US with more diversity at senior management level improved their market share the previous year, while only **33%** companies with less diverse management reported similar growth

Center for Talent Innovation



Companies with at least **30%** female leaders end up raking-in **6%** higher net margins

The Peterson Institute for International Economics



Companies with a higher percentage of women in executive positions have a **34%** higher total return to shareholders than those that do not.

Catalyst.org

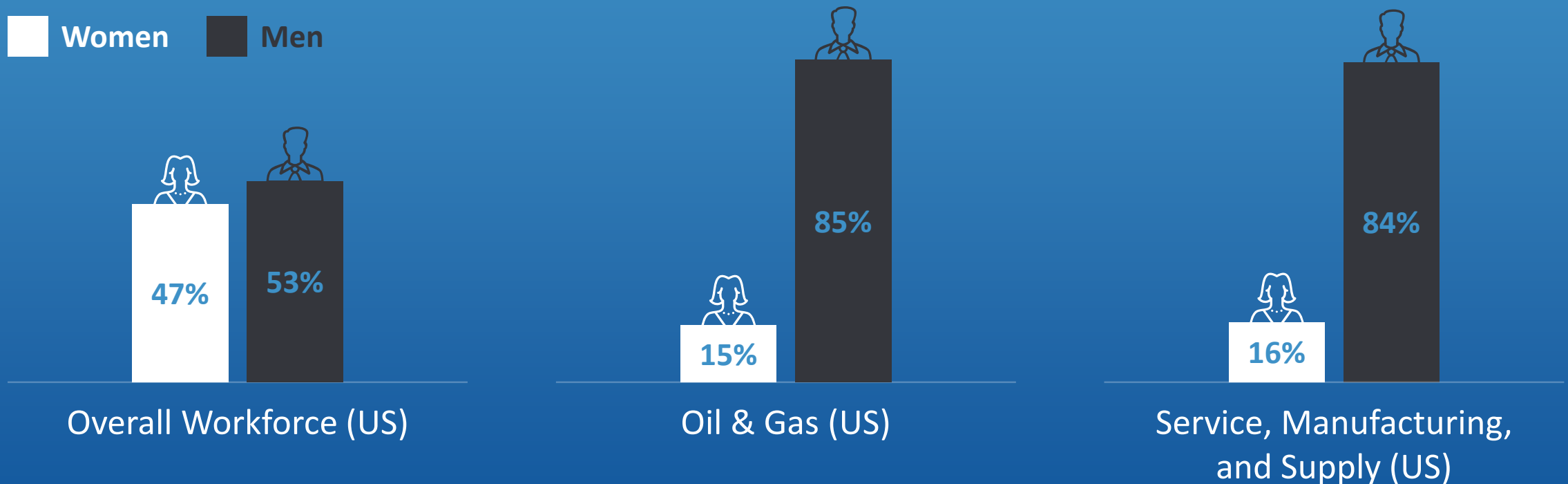
SOURCE:

Morgan Stanley, World Economic Forum
"How Gender Diversity Enhances Society" 2018



...Oil & Gas, in general, can seek to take advantage of the full benefits of gender diversity

Women Men

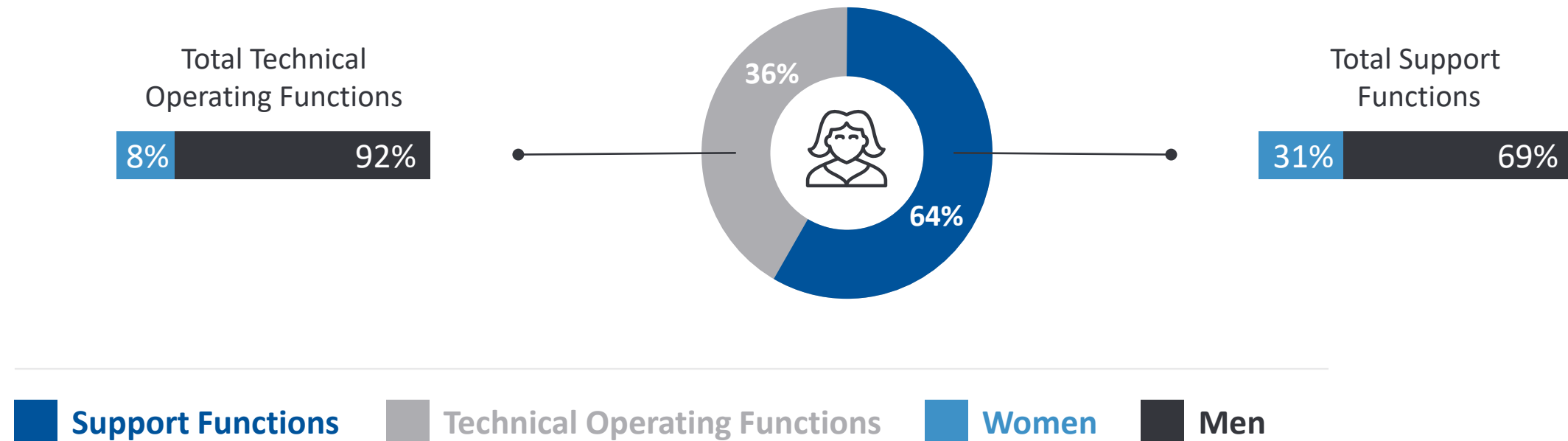


SOURCE:

Overall and Oil and Gas Workforce: Department of Labor Statistics, Oil & Gas related industries (oil and gas extraction, petroleum refining, pipeline transportation, construction, and mining and oil and gas field machinery manufacturing)
Gender Diversity Study 2018, prepared for PESA by Accenture

The challenge of promoting diversity intensifies when examining technical career ladders...

Women in our Sector by Job Discipline



...and promotion into leadership positions

80% of respondents cite women represent...

Emerging & Senior Leaders (first-line and middle/upper management)

Support
Functions



of leadership
ranks

Technical
Operating
Functions



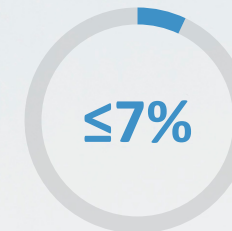
of leadership
ranks

Top Leaders

(highest ranking executives)



of executive
leadership ranks



of executive
leadership ranks

DRIVER #1

DRIVER #2

DRIVER #3

Recognition and awareness that gender diversity matters

Oil & Gas is a male dominated industry?

72% AGREE

13% DISAGREE

10% NEITHER

5% DON'T KNOW

Overall, how important do you think it is that the Oil & Gas industry ensures it is an attractive employment sector for women?

51% IMPORTANT

21% NOT IMPORTANT

26% NEITHER

SOURCE:
BP Rig Zone 2013 Diversity & Inclusion Report
(nine out of ten survey respondents were male)



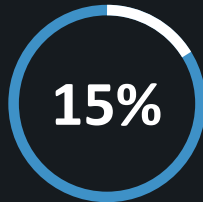
DRIVER #1

DRIVER #2

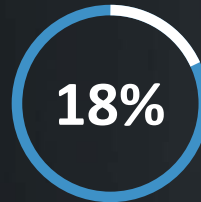
DRIVER #3

Recruiting female talent lags our ambitions

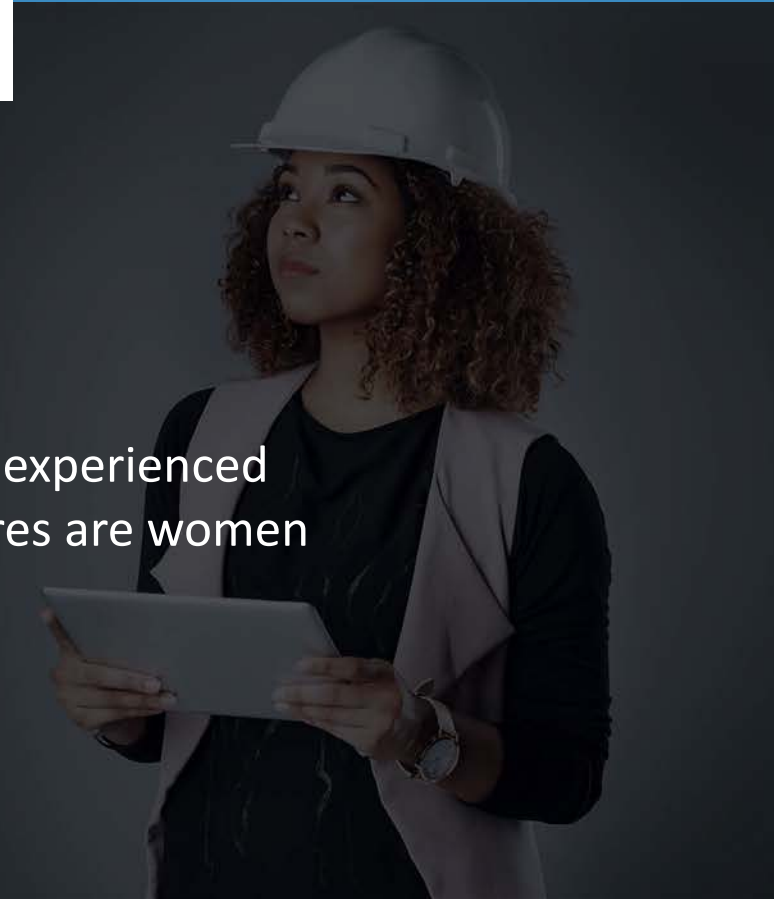
Among PESA sector companies...



of entry-level
hires are women



of experienced
hires are women



SOURCE:
Gender Diversity Study 2018, prepared for PESA by Accenture
USA Employee Figures for 2017 shown

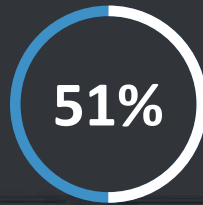


DRIVER #1

DRIVER #2

DRIVER #3

Limited efforts are made to understand why women are leaving and how retention and advancement can be improved



51%

of respondents do not track the drivers of voluntary outflow of women



Lack of flexible work programs
(Work/Life Balance)



Perception of better career prospects elsewhere



Lack of advocacy and sponsorship



SOURCE:
Gender Diversity Study 2018, prepared for PESA by Accenture

To make step changes...

We can start with a focus on proven factors to advance women into greater leadership positions

01 BOLD LEADERSHIP

Diverse leadership team that sets, shares and measures equality targets openly.

02 COMPREHENSIVE ACTION

Policies and practices that are family-friendly, support both genders and are bias-free in attracting and retaining people.

03 EMPOWERING ENVIRONMENT

One that trusts employees, respects individuals and offers freedom to be creative and to train and work flexibly

SOURCE:
Getting to Equal 2018, Accenture (US findings)

When exposed to working environments where factors are more common:



Women are **42% more likely** to advance to manager or above and **five times more likely** to advance to senior manager/director or beyond

FACTOR #1

FACTOR #2

FACTOR #3

Bold Leadership—Gender equality must be a strategic priority for the CEO and executive leadership team

Key Factors That Influence Advancement

01

A diversity target/goal is **shared outside the organization**

02

Gender diversity is a **priority for management**

03

The organization clearly states **gender pay gap goals and ambitions**

PESA Current State Findings



C-Level Gender Diversity Strategy

(eg. gender workforce targets by date)



have C-level endorsed gender diversity strategies

FACTOR #1

FACTOR #2

FACTOR #3

Comprehensive Action—Workplace policies and programs must be created and supported to drive gender equality

Key Factors That Influence Advancement

01

Progress has been made in **attracting, retaining, and progressing women**

02

The company has a **women's network**

03

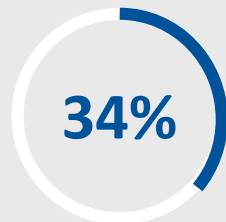
The company has a **women's network open also to men**

04

Men are encouraged to take **parental leave**

PESA Current State Findings

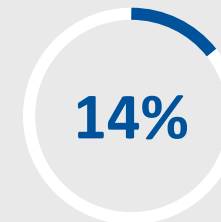
→
Fully Paid Parental Leave



offer 6 or more weeks of paid primary caregiver parental leave



Women in Mentorship/Sponsorship Programs
(eg. leadership development; coaching)



offer mentorship programs and actively track female participation

FACTOR #1

FACTOR #2

FACTOR #3

Empowering Environment—Companies must empower and trust their employees, allowing them to be themselves at work

Key Factors That Influence Advancement

01

Employees have never **been asked to change appearance** to conform to company culture

02

Employees have the freedom **to be creative and innovative**

03

Virtual/ remote working is widely available and is common practice

04

The organization provides **training that keeps skills relevant**

05

Employees can avoid overseas/ long distance travel via **virtual meetings**

06

Employees can work from home on a day when they have a personal commitment

07

Employees are comfortable reporting sexual discrimination/ harassment incident(s) to company

FACTOR #1

FACTOR #2

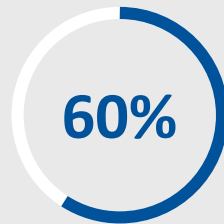
FACTOR #3

Empowering Environment—Companies must empower and trust their employees, allowing them to be themselves at work

PESA Current State Findings



Flexible Work Programs
(telecommuting, 9/80s, Job-sharing)



offer basic flexible work programs, such as telecommuting



Dependent Back-up Care
(e.g., emergency childcare, eldercare)



of companies offer subsidized dependent back-up care or partner with a provider of accessible back-up care options



**Diversity & Inclusion
Learning & Dev. Programs**
(e.g., unconscious bias training)



offer learning & development initiatives targeted at inclusion & diversity

SOURCE:
Gender Diversity Study 2018, prepared for PESA by Accenture

Where do we go from here?



INCREASE OUR UNDERSTANDING

Encourage more PESA members to participate & supplement baseline findings with qualitative interviews of executives and surveys to industry men and women.



DEVELOP PESA SPECIFIC RECOMMENDATIONS

Develop specific recommendations & PESA programs to advance a greater number of qualified women into leadership positions within the oilfield service and supply sector of Oil & Gas.

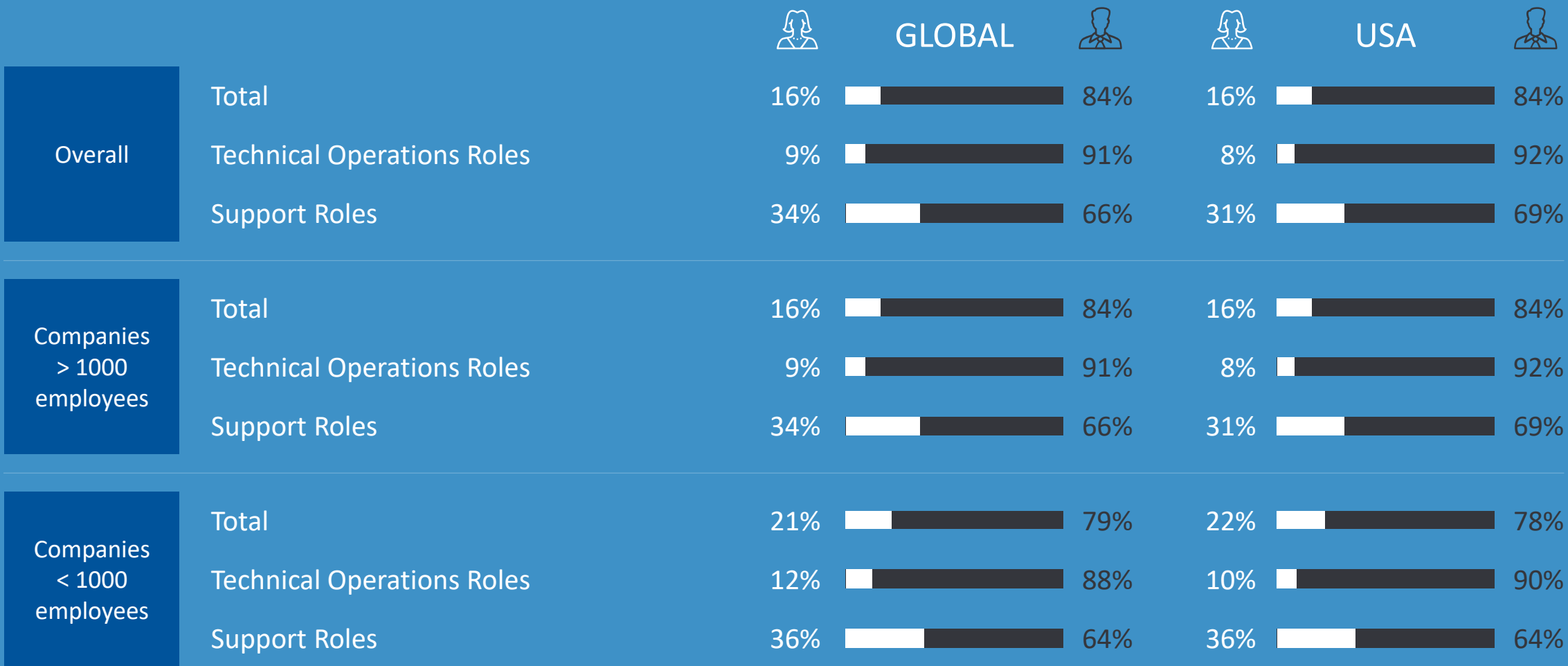


EXPLORE ADDITIONAL FACETS OF DIVERSE WORKPLACES

Overtime, expand beyond gender diversity to other topics of Diversity & Inclusion such as race, nationality, age, and linkage to important topics such as digital innovation and safety cultures.

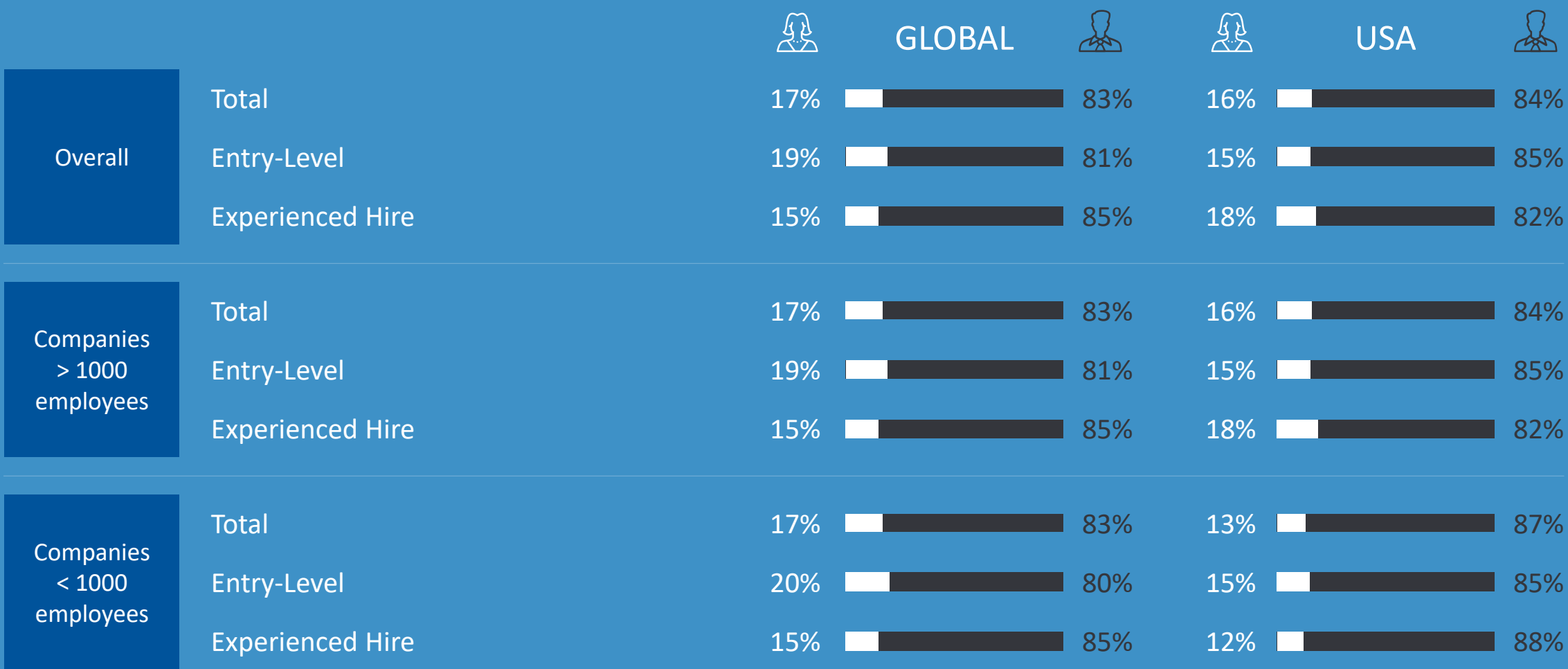
Appendix

SURVEY FINDINGS: WORKFORCE COMPOSITION



SOURCE:
PESA Gender Diversity Study 2018, prepared for PESA by Accenture
NOTES:
36 Respondent Companies Total (35 USA)
Technical Operations Roles – Engineering, Field, Research, Etc. Support – IT, HR, Legal, Finance, Etc.

SURVEY FINDINGS: RECRUITMENT

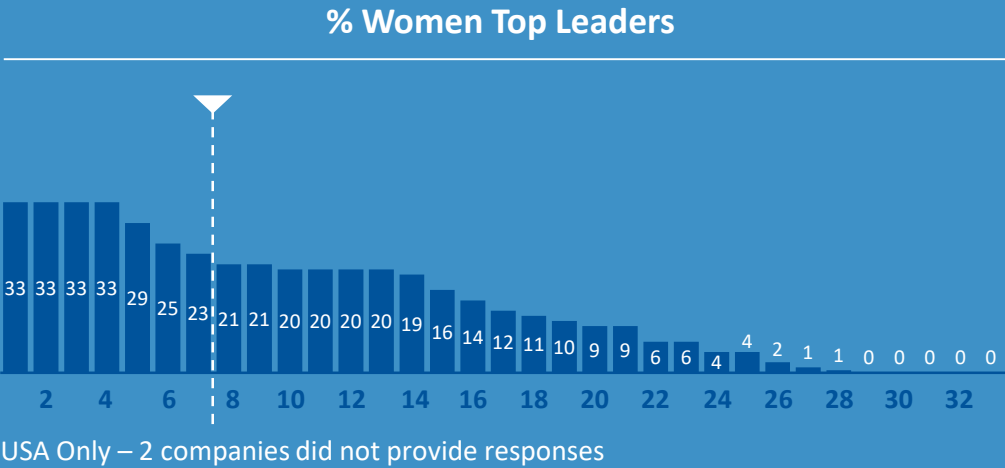
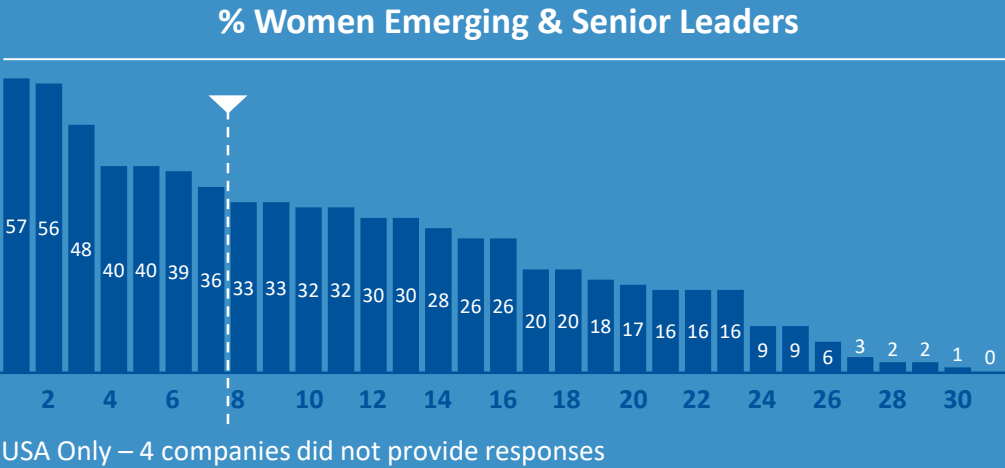


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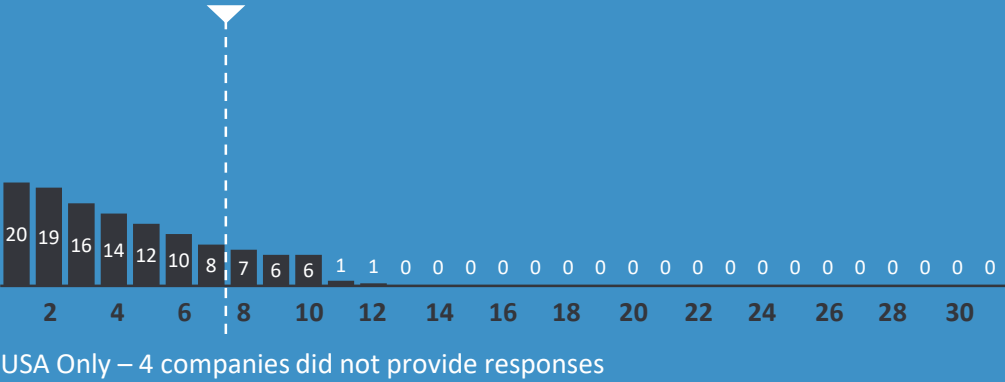
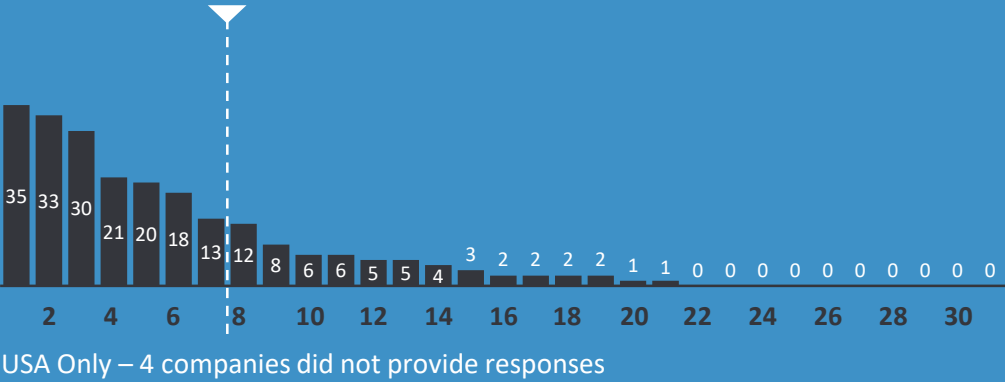
SURVEY FINDINGS: WOMEN IN LEADERSHIP

Ranking of Company Responses – High to Low

Support Functions



Technical Operations

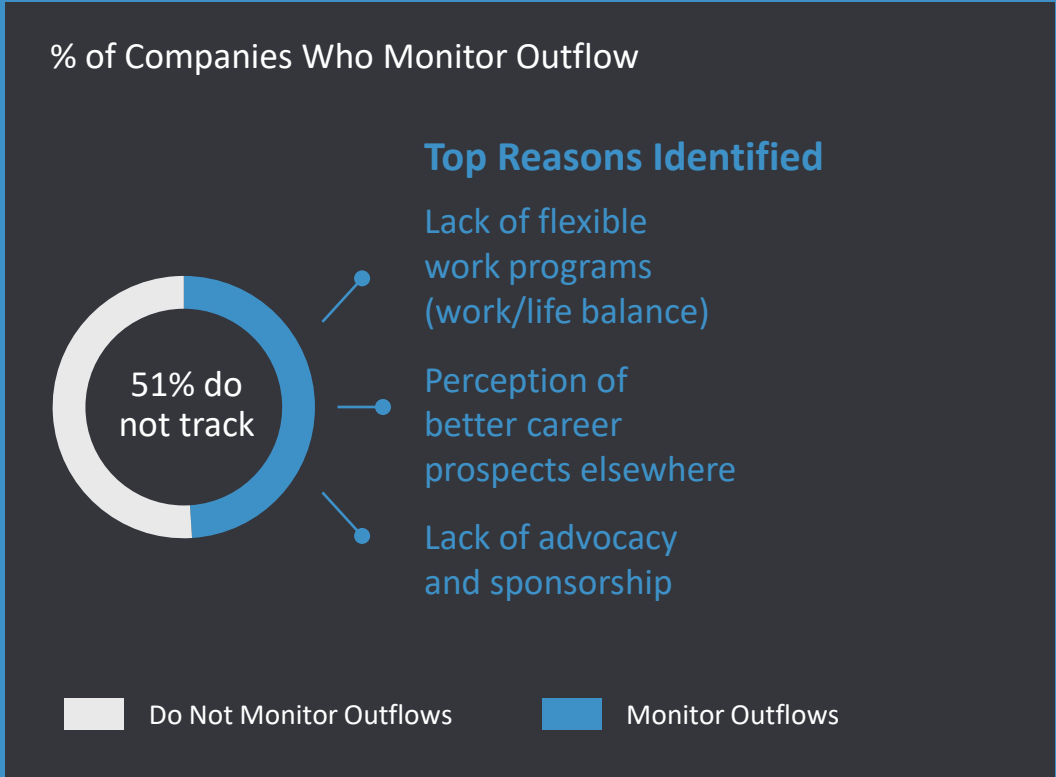


SOURCE:
PESA Gender Diversity Study 2018, prepared for PESA by Accenture
NOTES:
36 Respondent Companies Total (35 USA)
Emerging & Senior = First Line and Middle/Upper Management; Top = Highest-Ranking Executives

SURVEY FINDINGS: OUTFLOW & RETENTION STRATEGY

USA SPECIFIC

OUTFLOW OF WOMEN



STRATEGY & PROGRAMS

	Company Size		
	<1000	>1000	Overall
Paid Parental Leave ¹	47%	25%	34%
Flexible Work	73%	50%	60%
Dependent Back-up Care	0%	0%	0%
Sponsorship / Mentorship Programs	13%	15%	14%
Diversity & Inclusion Learning & Development Initiatives	13%	45%	31%
C-Level Diversity Strategy	13%	25%	20%

SOURCE:
PESA Gender Diversity Study 2018, prepared for PESA by Accenture
NOTES:
36 Respondent Companies Total (35 USA) 1. ≥6 weeks fully paid

ABOUT THE RESEARCH

36

Total Companies Participating



16 <1000 Total Employee Headcount



20 >1000 Total Employee Headcount



22 Reported Non-US Employee Headcount

249,226

Combined Employee Headcount



102,553
US Headcount



146,713
Rest of World Headcount

29,286

Combined 2017 Recruits



16,171
Total US Recruits



62%
Entry-Level US Recruits

SOURCE:
Gender Diversity Study 2018, prepared for PESA by Accenture
NOTES:
PESA contacted over 200 sector companies during February-April 2018, of which 36 responded, representing 250,000 men and women in the sector

ABOUT PESA

The Petroleum Equipment & Services Association (PESA) is the unified voice for the energy industry's service, supply and manufacturing organizations, advocating for and supporting this sector's achievements in job creation, technological innovation, and economic stability. PESA is a trusted resource, advancing member priorities on key industry issues.

Vision: To promote the oilfield service and supply sector of the energy industry and provide our membership with opportunities to network, elevate issues critical to their businesses and effectively train their workforce.

Within PESA there are 16 committees working to advance PESA's mission.

ABOUT ACCENTURE

Accenture is a leading global professional services company, providing a broad range of services and solutions in strategy, consulting, digital, technology and operations. Combining unmatched experience and specialized skills across more than 40 industries and all business functions – underpinned by the world's largest delivery network – Accenture works at the intersection of business and technology to help clients improve their performance and create sustainable value for their stakeholders. With approximately 442,000 people serving clients in more than 120 countries, Accenture drives innovation to improve the way the world works and lives.

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