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C-Suite Survey - Executive Summary

December 12, 2017 – The 49th edition of the C-Suite Quarterly Survey was conducted on behalf of KPMG, published by the *Globe & Mail's Report on Business*, and broadcast by BNN. Telephone interviews were conducted with 153 C-Suite executives at ROB1000 companies between Nov. 11 & Dec. 6, 2017. This quarter's survey asked the C-Suite about:

- The state of the retail sector in Canada
- Sexual harassment in the workplace

Sexual Harassment in the Workplace

- Most in the C-Suite said they have not witnessed or heard of specific cases of sexual harassment in their companies. About one in three (31%) said they were aware of specific cases in their own company.
- Most agreed that the majority of sexual harassment cases go unreported.
 - Almost none believe sexual harassment in the workplace is reported most of the time.
 - They are somewhat more likely to believe harassment cases are reported in their own companies than in the workplace generally; even so, only 25% believe most cases in their companies are reported.
- Far fewer agreed that their company has a sexual harassment problem.
- In a forced choice, executives were more likely to say sexual harassment in the workplace is “infrequent and rare” than “common and frequent.”
- Most believe sexual harassment in the workplace is less of a problem than it was 15 years ago – with 69% saying this, and almost none saying it is more of a problem today.
- The clear majority of the C-Suite believes their companies have:
 - appropriate policies to respond to sexual harassment
 - a culture that responds to sexual harassment
 - well-communicated policies on reporting/responding to sexual harassment
- Representatives of larger employers are more likely to agree strongly they have well-communicated policies to prevent sexual harassment. They were also more likely to be aware of cases or incidents in their company.
- Representatives of larger employers were also more likely to stress education and training programs as important measures to prevent and respond to harassment.

TORONTO
65 Queen Street West, Suite 510
Toronto, ON M5H 2M5
T 416.644.4120

info@gandalfgroup.ca | gandalfgroup.ca

OTTAWA
116 Albert Street, Suite 300
Ottawa, ON K1P 5G3
T 613.699.8910

- Most believe recent, high-profile harassment cases will have at least some impact on policies and measures Canadian businesses take to prevent and respond to sexual harassment.
- One in five (22%) said their companies have updated policies and measures to help prevent and respond to sexual harassment in the past year.
- Yet almost all in the C-suite believe culture and leadership are more important than policies and procedures at helping prevent and respond to workplace harassment.

The State of Retail in Canada

- While they see clear challenges, Canada's business community is optimistic about the potential of Canadian-based retailers.
- They agree that digital disruption and e-commerce are serious threats:
 - 86% agreed digital disruption is a serious threat to Canadian retail
 - 46% of the C-Suite is very or somewhat concerned about digital disruption in respect of their own business
- And they believe retailers must do more than they have done to adjust to the online marketplace, with 77% agreeing that Canadian retailers are not adopting e-commerce fast enough.
- Yet most (64%) believe the high-profile case of Sears Canada's demise was mostly a result of unique challenges facing that company.
- And almost all (96%) agreed Canadian retail companies can compete if they evolve and adopt digital strategies and embrace e-commerce more effectively.
- Most agreed Canada's workforce is well-placed to compete in e-commerce (74%)
- And while competition from online competitors is a clear threat, many believe Canadian retailers have to adjust their offering in different facets – i.e. differentiation through marketing strategies, product niches or better service:
 - 77% agreed traditional Canadian retailers can survive in a competitive marketplace because of their ability to provide outstanding customer service.
- When it comes to Amazon's proposed second headquarters (HQ2), most in the C-Suite believe Canada would be as good a location as the US, if not better. Only one in three believes Amazon would be worse off locating its proposed HQ2 in Canada as opposed to the US.
- For this reason and others, most in the C-Suite agreed it would be worthwhile for Canadian governments to try to lure firms such as Amazon here. More important though is that governments should be trying to ensure Canadian retailers can compete with the right business environment. A stronger majority agreed this should be the priority of governments than agreed it should be trying to attract high-profile targets such as Amazon.

More detailed information and data pertaining to additional questions including a presentation of this quarter's findings will be available in PowerPoint from Gandalfgroup.ca.

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