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**MARCH 2022**  
UK RESEARCH REPORT

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# **THE MCKENZIE-DELIS UK REVIEW**

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IN ASSOCIATION WITH IPSOS  
KPMG  
DIALGLOBAL

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DIALGLOBAL, BRITVIC, ACCENTURE, IPSOS, JDJ, KPMG, LEXISNEXIS RISK SOLUTIONS

# MESSAGE FROM KPMG

## **BINA MEHTA**

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**CO-CHAIR** OF THE MCKENZIE-DELIS REVIEW AND CHAIR OF KPMG UK

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It is clear when I speak to my peers that equality is now a top board priority. As leaders, we are responsible for meeting stakeholders' and our employees' expectations in driving real and lasting change, not just within business but across society.

Organisations that make inclusion, diversity and equity central to their business strategy have a competitive advantage. It is good for business and it is good for society. Profit and purpose are no longer mutually exclusive. Those that don't act and put change agendas in place will miss out on growth and the opportunity to drive societal change.

The holistic approach of this review shines a spotlight on the many facets of diversity. Throughout our lives, we will all relate to one or more of these. And it's important that we recognise the uniqueness which comes from the intersectionality of experience and background. Inclusion is how we choose to embrace these.

Collecting quality workforce data is fundamental to driving change. It may reveal uncomfortable truths, but it is a step closer to turning the dial. Demonstrable progress will come from addressing structural and cultural barriers.

Many businesses are taking significant steps to open up opportunities, create pathways and foster an inclusive environment. But it's not just about numbers, processes and policies. We cannot lose sight of how much further there is to go to improve the experience of all historically underrepresented groups in the workplace.

As part of our journey towards embedding an open and inclusive culture, we have seen success in creating tailored programmes to address specific facets of diversity. We have set stretching targets, including becoming one of the first businesses to set representation targets for people from lower socio-economic backgrounds. We hope that doing so empowers our people and our communities, and encourages other businesses to do the same. Collectively, we can drive sustainable change.

The McKenzie-Delis Review presents an opportunity for businesses to come together to be a greater force for good – sharing best practice and continuing to give all aspects of inclusion, diversity and equity the focus they deserve.

# FOREWARD

## LORD SIMON WOOLLEY

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CO-CHAIR OF THE MCKENZIE-DELIS REVIEW AND PRINCIPAL AT HOMERTON COLLEGE, CAMBRIDGE UNIVERSITY

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The last two years have been traumatic. But the perfect storm created some of the bravest, profound and uncomfortable conversations our society has ever had. People spoke for the first time about their lived experiences and it wasn't pretty. We demonstrated the systemic barriers that lock talent out right in front of our eyes, and lock others in. The past couple of years have changed that.

Big businesses are starting to ask some searching questions when it comes to diversity and inclusion (D&I), but there is so much more that needs to be done, particularly in senior leadership positions.

We need to ensure we create multiple pathways to success and a pipeline of diverse talent so that people know it doesn't matter where you start – you can get to wherever you want to be. Institutions, policy, business and society all benefit if we can get diversity right.

While this report shows companies are beginning to build ethnicity and gender into their leadership teams and succession plans and mental health is now firmly on their agenda, there is still a long way to go to address inequalities in our schools, businesses and communities.

While there is no doubt that we have a lot of work to do before our world is truly equal, there is much to be positive about. This review highlights some of the incredible things that are being done by organisations across the UK to create more diverse and equal workplaces.

We already have so many of the solutions to tackle the issues; they just need to be applied more broadly and driven through with passion, process, and persistence. I urge all leaders and organisations to take this best practice and adapt it for their own workplaces today.

## BEN PAGE

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CO-CHAIR OF THE MCKENZIE-DELIS REVIEW AND CEO OF IPSOS

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Results of the McKenzie-Delis Review show that even those businesses thinking about diversity have blind spots. The fact that legally mandated aspects of diversity like gender and disability get much more attention than areas like age and social background is a reminder that even the most progressive businesses need to keep flexing what they do and being creative.

The pandemic has broken the widespread taboo against remote working, and has increased expectations from employees that employers will provide more flexibility about where and when "work" happens, and a greater focus on their wellbeing. Those employers that do not will be less successful than those who do.

# PREFACE

“The McKenzie-Delis Review is the first review of its kind offering a comprehensive and nationwide analysis across ten key facets of workplace diversity.”

## LEILA MCKENZIE-DELIS

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CEO OF DIAL GLOBAL, FOUNDER OF THE MCKENZIE-DELIS FOUNDATION

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The business case for diversity and inclusion (D&I) is stronger than ever. Companies with more diverse executive teams are now more likely than ever to outperform their less diverse peers on profitability, by up to 35% (McKinsey, 2020) in some cases. If a business was told they could increase their profitability by even a fraction of that, for any other reason other than diversity, they would do it. Organisations are literally throwing away money by ignoring the problem and not encompassing D&I as part of their business strategy.

Additionally, this year companies will be pushed to put even greater focus on D&I as a critical component of the social pillar of environmental, social and governance (ESG). This growing attention from the media and from institutional investors, who are now incorporating ESG considerations within their investment processes, will continue to force everyone to take D&I seriously.

It is vital that disparities are addressed as organisations look to bounce back from the impacts of the pandemic. By fostering a diverse environment, employers can better access and retain new talent pools and bring in different expertise and perspectives into the workplace. This can help organisations be more innovative and agile while promoting a diverse approach to problem solving and future-proofing.

Through our work at the McKenzie-Delis Foundation, I'm pleased to say that some of the biggest companies in the UK are increasingly recognising the economic value that a holistic inclusion strategy can bring, which was highlighted in our 2020 pilot review.

The McKenzie-Delis Review is the first review of its kind, offering a comprehensive and nationwide analysis across ten key facets of workplace diversity. As opposed to looking at only a single facet of diversity, we looked at race and ethnicity, gender, age, disability, sexual orientation, mental health, socio-economic background, nationality, religion, and parenthood.

Through this important study, we are working to make UK businesses understand exactly what the barriers in the way of diversity are, what they can do about it, and hold them accountable to change.

### **Leila McKenzie-Delis**

Founder and CEO

# ABOUT THIS REPORT

The aim of this report is to create an industry standard diagnostic and meaningful report on the many aspects of both visible and invisible diversity.

# GOALS

“Thanks to those leading businesses who contributed and shared their data for the 2021 McKenzie-Delis review – it’s a must read!”

**KARI DANIELS**, CEO, TESCO IRELAND

“This review demonstrates that progress is still being made despite the financial impact of the pandemic. My concern is that many organisations are becoming Diversity Doughnuts - more diverse in the boardroom (driven by the recent acquisition of NEDs from visibly underrepresented and minority communities) and diverse at the junior entry level (mirroring the demographics of Gen Z). But the crucial final pathway to senior executive leadership remains the hole in the doughnut. We need to focus on filling the hole. That is the centre of organisational power.”

**SANJAY BHANDARI**, CHAIR, KICK IT OUT

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## THE GOALS INCLUDE:

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Curate a holistic survey that recognises ten aspects of diversity, inclusion and belonging relating to both visible and invisible diversity.

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Enlist a diverse and inclusive Review Committee from different sectors and backgrounds and chaired by industry leaders.

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Partner with renowned subject matter experts to develop thought leadership and up-to-date expertise on each of the ten facets of the “dial”, and co-create questions for the survey. Ensure that we do not “recreate the wheel” with questioning; ensuring all ten facets are as collaborative and intersectional as possible.

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Collaborate with leading institutions, research and charity partners including but not limited to: UN Global Compact Network UK, Business Disability Forum, Stonewall, the Centre for Ageing Better, Mind, Power of the Parent, and Minds@Work, with the goal being to glean expert advice and support co-creation of the survey.

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Draw upon all research and strategic partners, in addition to the McKenzie-Delis Review Committee, to produce collaborative and inclusive recommendations.

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Name and recognise those who took part and utilise shared knowledge and efforts to promote best practice.

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Utilise shared knowledge and efforts to promote best practice.

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Promote as widely as possible through both involved organisations and the media in order to gain as much traction as possible.

## **Selection of Facets**

The ten facets considered in this review were selected through consultation with diversity and inclusion (D&I) specialists and members of the DIAL Global™ network of business leaders. The final selection led to the prioritisation of ten distinct aspects of D&I – ethnicity, gender, age, nationality, mental health, sexual orientation, socio-economic status, disability, religion, and parenthood. These ten facets are considered by the network to be key areas of attention for organisations dedicated to improving workplace D&I.

## **Social and Business Relevance**

To establish the social and business relevance of the selected facets of the review, we collaborated with the UN Global Compact Network UK. We conducted a mapping exercise, exploring the link between each of the facets and the United Nations Sustainable Development Goals (SDGs). The SDGs constitute an ambitious blueprint to achieve a better and more sustainable future for all, and call on all of society to pool creativity, knowhow, technology, and financial resources to achieve the SDGs in every context.

All ten facets – ethnicity, gender, age, nationality, mental health, sexual orientation, socio-economic status, disability, religion, and parenthood – were found to be linked to SDG 8 (Decent Work and Economic Growth) and SDG 10 (Reduced Inequalities). SDG 8 promotes “sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all”, while SDG 10 aims to “reduce inequality within and among countries”. In addition to SDG 8 and SDG 10, certain facets also connect to SDG 3 (Good Health and Well-being), SDG 4 (Quality Education) and SDG 5 (Gender Equality), as recognised throughout this review.

## **Survey Question Creation**

To ensure the questions in the review adequately reflect the perspectives of marginalised groups and address aspects where organisations can influence change, we consulted with expert research partners to co-create the questions. The following organisations made up our experts: Stonewall, the Centre for Ageing Better, Business Disability Forum, Power of the Parent, Mind, and Minds@Work. We also consulted our review committee to ensure the questions were appropriate and relevant.

## **Recommendations:**

There are many solutions to tackle the issues; however, to succeed, they need to be applied broadly and driven through with passion, process and persistence. At the end of each facet section, we have collated best practice actions from our participating organisations, research partners and our review committee on how organisations can continue to move the dial on D&I.

## **Note on the Data Collection Methodology**

This survey was conducted via a mix of online and video conferencing methodology in collaboration with Ipsos and the McKenzie-Delis Foundation. A survey was sent by Ipsos to UK companies from the private and public sectors, including the FTSE 500, public sector departments and other private companies. An invitation to participate was sent to Chief Executives, Company Secretaries, HR Directors and D&I Leads from UK companies within the FTSE 500 and top UK private companies. Organisations received an information sheet detailing how their data would be used and consented to these terms upon participation. Data were collected between March 2021 and January 2022. Eighty-three organisations participated in total. A list of the organisations that consented to the name of their organisation being published in this report as having participated is included in the Appendix.

Results from the survey are presented unweighted. The margin of error for a sample size of 85 is  $\pm 11\%$ . The sample, by definition of being FTSE 500 companies, is skewed towards larger employers, and therefore is not representative of UK employers as a whole. The overall profile of responses on different dimensions of diversity is, however, worthy of reflection with these provisos. In addition, a total of 18 qualitative interviews were conducted with diversity, equity and inclusion (DEI) and HR leaders of participating companies to uncover further trends and nuances.

## Definition of Leadership Team

Several questions in the survey asked about the leadership team of an organisation. The leadership team was defined in the survey as follows: Members of the Executive Committee and those senior leaders who are Direct Reports to Executive Committee members. Sometimes it's referred to as the 'C-suite plus one'. The Executive Committee is responsible for managing and running a company. It typically comprises the Chief Executive, Chief Financial Officer (CFO) and leaders of other key functions – including Legal and Operations. The Executive Committee's Direct Reports are those individuals that report directly to the Chief Executive, CFO and other functions day to day. The source of this definition is the Hampton-Alexander Review.

## Defining Ethnicity

Throughout the survey and report, we used "Black, South or East Asian, or other ethnic minority" as this is commonly used by companies in data reporting. The difficulties of using this terminology are recognised, as it can mask significant differences between representation of different ethnicities.

## Note from the Editor

This review is made up of primary and secondary research and also drew on the personal experiences and opinions of many experts and leaders in the field. While it was important for us to represent the research and data in a factual, unbiased manner, we also wanted to ensure that our many contributors had the opportunity to candidly express their thoughts and opinions about the research and what is needed to make progress in diversity moving forward. While it may not be traditional to include emotional, personal opinions in these types of reports, we decided to break with convention on this important topic.

"This is a unique, comprehensive and insightful report across the different dimensions of diversity and is a must read for leaders and DEI practitioners. Two areas I'd highlight- I am particularly pleased that the report highlights the lack of comprehensive data on socio-economic diversity, which must be a priority for firms to address and enable positive actions to be implemented.

I am encouraged by the focus on mental health by most companies, however, the lack of focus and structures for neurodiverse individuals is a concern and is an area that must be prioritised in the coming years."

**MDUDUZI MSWABUKI**, PARTNER, EY UK FINANCIAL SERVICES, CO-CHAIR, DIVERSITY AND INCLUSION, PARTNER SPONSOR, EY RACE AND ETHNICITY NETWORK

"It is positive to see organisations committing to engaging and expanding their work on equality, diversity and inclusion across multiple facets. This survey allows a reflective exercise for organisations, where they have the opportunity to better understand what they're doing well, what they aren't doing so well and provides them with ideas on how they might improve. For this agenda and journey to move further forward, it is critical for organisations to begin to recognise and be cognisant of intersectionality and looking at these multiple facets provides the foundation blocks to enable this to happen."

**EDLEEN JOHN**, INTERNATIONAL RELATIONS, CORPORATE AFFAIRS AND CO-PARTNER FOR EQUALITY, DIVERSITY AND INCLUSION DIRECTOR, THE FA GROUP

“The report highlights that progress is being made in terms of succession planning in areas such as ethnicity and gender through organisations having proactive plans in place to address this. It is not a quick fix and a proactive approach to personal development to bridge development needs, as well as ensuring the initiatives are constantly monitored and reviewed will be essential if we are to achieve a sustainable shift.

Mental Health has risen up the agenda during COVID-19 with senior executives admitting they have found the period difficult. I would suggest that leaders who are authentic and open about these issues are likely to have a more engaged and committed workforce. I would also say that authenticity and openness of leaders in areas such as sexual orientation and parenthood will accelerate acceptance of an inclusive culture within the organisation.”

**SAM ALLEN**, MANAGING DIRECTOR, SAM ALLEN ASSOCIATES

“The radical shift to a systemic, flexible working model has the potential to be an inflection point in accelerating the intersectional diversity and inclusivity of organisations in the UK – enabling talent within organisations to more effectively manage disability and mental health, better manage caring provisions, to be less limited by geography.

Have organisations taken full advantage of that moment – the evidence from the Review suggests that whilst leadership commitment and confidence in open dialogue within organisations continues to grow, leaders still approach building more inclusive and diverse organisations as an incremental task vs simply how we create better (for profit, people and planet) businesses.”

**JOANNA ALLEN**, CEO, GRAZE

2021 was undoubtedly a difficult year for many and felt like a long struggle with considerable uncertainty, working from home, businesses fighting to adapt, lack of proper downtime or holidays and the disease itself. In this context, I think it is very encouraging to see the progress made in respect of diversity and inclusion.

Also, it has meant that companies have had to prioritise and that may be why the number of companies participating is lower than I would have hoped in the second year of the review. I also worry that those who have participated are to some extent self-selecting and the results therefore err on the side of optimism.

It is quite clear to me that Boards are increasingly committed to driving gender and ethnic diversity and get the fact that diversity is good for business. In my experience, it is easier to improve both gender and ethnic diversity on Boards, where good progress is being made, than in the executive leadership team and throughout the organisation. In many cases good intentions are not yet turning into focussed action plans with consequent results coming through. The diversity pipeline clearly needs further development in many organisations.

**ANDREW ALLNER**, CHAIRMAN, SIG GROUP PLC AND CHAIRMAN OF SHEPHERD BUILDING GROUP LIMITED

# EXECUTIVE SUMMARY

**The McKenzie-Delis Review encompasses race and ethnicity, age, gender, sexual orientation, mental health, disability, socio-economic background, nationality, religion, and parenthood.**

The annual review is commissioned to broaden the awareness and understanding of visible and invisible segments of diversity and better understand how organisations are reporting, measuring and taking action to become more inclusive and diverse employers.

For the facets of gender, ethnicity and sexual orientation, research partners chose questions which focus on Leadership Teams. For the facets of disability, age, religion, nationality, socio-economic background, mental health and parenthood, the questions ask more broadly about workforce policies and initiatives.

Going forward, our goal is for the McKenzie-Delis Review to be a useful, annual diagnostic tool to help organisations assess their position on each of the facets and identify what their areas of focus should be, as well as measure and report progress on all ten facets.

The results from this survey indicate that there are areas of strength on each of the individual facets, as well as areas where more could be done to move the dial and drive change. What each organisation focuses on will depend on their strategic areas of priority and where they are on their diversity and inclusion (D&I) journey.

At the end of each of the following sections, dedicated to each facet, specific recommendations for action and initiatives are given based on the expertise of the research partners and review committee.

We recommend you consider your organisation's areas of priority and ask, do you have these activities in place, and if not, would focusing on them help you 'move the dial'? Additionally, consider the aspects of D&I you may not have focused on before and start the conversation with your leaders and employees. Are these areas where we need to take more action? If so, then what?

On this basis, the McKenzie-Delis Review will achieve its aim of creating a holistic solution and the standard for the future. A future where companies recognise, report and progress the many different aspects of D&I.

“The McKenzie-Delis Review is a catalyst for moving DEI forward at a global level. Its focus on the ten facets of D&I and tangible recommendations for action will be a powerful trigger to do more, and to accelerate moving the dial. It is equally relevant for all companies however large or small, and however advanced they are on their DEI maturity curve.

The experience of the past two years has provided us with a watershed moment to build on a truly inclusive way of working that benefits under-represented communities, recognising the intersectional nature of their challenges. This Review gives us insight into the actions we can all take to accelerate universal inclusion and deliver sustainable solutions for the future. Barclays is pleased to be part of the Review and to glean so many insights from its recommendations.”

**PAULETTE COHEN**, HEAD OF D&I, UK, EUROPE AND MIDDLE EAST BARCLAYS

# KEY FINDINGS:

## 01

### GENDER

Three in four (76%) participating UK companies say they specify gender diversity in leadership succession planning and seven in ten (72%) track progress towards it. Yet only one in five (19%) have at least 50% female representation on their senior leadership team.

## 02

### ETHNICITY

Two in five (42%) participating UK companies say they have no ethnic minority representation on their leadership team to date. However, two-thirds (67%) of participating UK companies include ethnic diversity in leadership succession planning and six in ten (61%) have stated initiatives against this.

## 03

### SEXUAL ORIENTATION

Only one-quarter (27%) of participating UK companies have LGBTQ+ representation on their leadership team and only 39% have approved an LGBTQ+ strategy in the past 12 months.

## 04

### DISABILITY

One in three (34%) participating UK companies are actively looking to increase the number of disabled staff. Almost all offer workplace adjustments (97%) and nine in ten (91%) have dedicated employee assistance lines.

## 05

### AGE

Three in five (61%) have specific measures in place to reduce age bias in recruitment, but only 15% have training geared toward older workers and a further 15% have a peer support network.

# 06

## RELIGION

Religious tolerance is high with near-universal agreement that companies allow employees to wear religious symbols and clothing (90%), allow them to take time off for religious holidays and holy days (88%), and allow free discussions about religion and belief in the workplace (85%).

# 07

## NATIONALITY

Three-quarters (76%) promote the benefits of a culturally diverse workforce and two in three (64%) offer inclusivity training on how to work in a culturally diverse workplace.

# 08

## SOCIO-ECONOMIC STATUS

Three in five (61%) participating companies say they have specific outreach programmes to target candidates from lower performing schools or socio-economic backgrounds. However, only 21% collect and monitor data on the socio-economic background of their workforce.

# 09

## MENTAL HEALTH

Four in five (82%) have a mental health strategy in place, which often includes access to quality health care (93%) and mental health training (81%).

# 10

## PARENTHOOD

Three in four (76%) companies offer an uplift on statutory maternity pay, dropping to 64% for paternity and 60% for adoption pay. About half (52%) say their line managers get training on how to support expecting or new parents, and slightly fewer (48%) have formal support programs for employees returning from parental leave.

# STRATEGY AND LEADERSHIP

- **Diversity and Inclusion (D&I) Commitment**
- **Benefits of Belonging**
- **Intersectionality**

## **Diversity and Inclusion Commitment**

Most of the UK companies we surveyed say they are focusing on leadership diversity in some way, with many specifying gender and ethnicity as top priorities. And they are committing to improving D&I by having Chief Diversity Officers (CDO) or other Diversity, Equity and Inclusion (DEI) leaders in place (71%). While most of the CDOs in the companies we surveyed have some access to the C-Suite, only one in three say they report directly to the CEO (34%).

When DEI leaders report directly to the CEO, it places DEI at the centre of business strategy and not solely within HR. “Effectively, it means I am able to ensure DEI becomes an integral part of how we deliver our strategy. At dentsu, DEI works in partnership with our people function, and as a member of the executive leadership team I have the ability to inject D&I into the highest level of our operating model.” – Pauline Miller, Chief Equity Officer, EMEA at dentsu.

Some DEI leaders, particularly those in companies with mostly White employees, feel getting traction is tough without senior leadership. When the C-Suite is disengaged, even with voluntary employee resource groups (ERGs), initiatives and associated funding stall.

In the end, the key is access.

## **Benefits of Belonging**

Of the UK companies we spoke with qualitatively, the core principle many rally around is “belonging”, and making sure that everyone can bring their true selves to work. These companies understand that true belonging opens the door to more innovation, creativity, and an understanding and representation of the communities they serve or want to do business with. It is also a key driver for talent recruitment and retention.

## **Intersectionality**

As more focus is given to the many facets of diversity, it has become clear to the companies we interviewed that the next evolution of DEI is on understanding the intersectionality of facets. Of the UK companies we spoke to, many are already looking at different combinations, such as gender and ethnicity, gender and sexual orientation, gender and age, ethnicity and socio-economic status, ethnicity and disability, etc.

“The most important thing is that the CDO has visibility and buy-in from the executive leadership team and can connect directly to the CEO. However, with the complexity in driving this agenda it’s important to have everybody on board, from the CEO to our placemakers.”

**MICHELLE MUNCK BERTELSEN**, GLOBAL DIVERSITY AND INCLUSION MANAGER, ISS

# Ranking of Facets

Participants were asked 'yes' or 'no' questions on a series of statements related to each of the ten facets. These answers were then scored accordingly and given an average index score on a 100-point scale to provide more granularity.

Below is the rank order of each facet, with mental health and religion in first and second place, respectively.

The following report will review the data behind these findings in more detail.

## Index scores of facets – UK

Mental Health	85
Religion	77
Parenthood	69
Nationality	68
Gender	64
Disability	62
Ethnicity	58
Socio-economic Status	53
Age	51
Sexual Orientation	49

Note: See appendix for index score calculation

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## OVERALL KEY FINDINGS

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**71%** of participating UK companies have a Chief Diversity Officer, Head of Diversity and Inclusion (D&I), Diversity Director or equivalent.

Of those, **34%** report directly to the CEO.

**Four in five (81%)** of participating UK companies have a clear strategy for leadership team diversity.

This **strategy** mostly focuses on **gender (97%)** and **ethnicity (90%)**, with **disability** and **sexual orientation** in the second tier (**42% and 36%, respectively**).

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# OVERALL SURVEY RESULTS

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## 01

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**Does your business employ a Chief Diversity Officer (CDO), Head of Diversity and Inclusion, Diversity Director, or an equivalent role in a senior position with responsibility for diversity and inclusion?**

Source Q04  
N=85

Yes **71%**

No **29%**

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## 02

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**Does this person report into the CEO?**

Source Q05  
N=59

Yes **34%**

No **66%**

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## 03

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**Does your business have a clear strategy to ensure the composition of your leadership team is diverse?**

Source Q03A  
N=85

Yes **81%**

No **14%**

Don't know **5%**

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## 04

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**Which, if any, of the following does your strategy on leadership team diversity specifically mention?  
Please select all that apply**

Source: Q03B  
N=67

Gender **97%** Ethnicity **90%** Disability **42%** Sexual Orientation **36%** Age **28%** Nationality **22%**  
Socio-economic Status **22%** Mental Health **19%** Religion **18%** Parenthood **18%**

“There is much to celebrate in this report. The insight and benchmarks it provides across all aspects of diversity, the wealth of resources that can be accessed from the varied case studies and most inspiring is the gradual progress it highlights in embedding diversity and inclusion (D&I) across UK based organisations. There is though still much to do to tackle the inequalities that are inherent in many of our organisations and the comprehensive data of the report highlights just how complex the agenda has become.

As issues of D&I continue to rise in prominence, most organisations recognise that they will seriously limit the attractiveness, sustainability and success of their organisations unless they remain open and attractive to the full diversity of talent.”

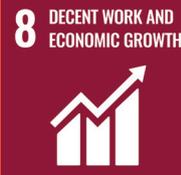
**DEBBIE HEWITT**, PLURAL NON-EXECUTIVE CHAIRMAN AT VISA EUROPE, BGL GROUP, WHITE STUFF AND THE FA

“It is encouraging to see the movement and commitment across organisations to embrace and support diversity. However, diversity on its own is not a means to change representation and belonging. Inclusion is the driver here, ensuring that everyone has a voice, is treated fairly, respected and feels safe, seen and connected. The lack of role models and advancement for diverse talent is not because diverse talent “needs fixing” but due to historic and systemic bias.

Taking action to challenge and have open and meaningful conversations around this and clear bold leadership from the most senior levels in an organisation is the agent of change. Recognising that this is not only the right thing to do but also that it will impact the effectiveness of the business, creating transformative, inclusive leaders benefits everyone.”

**ANDREW PEARCE**, MANAGING DIRECTOR, ACCENTURE

DIVERSITY AND INCLUSION  
ARE AT THE HEART OF THE  
**UNITED NATIONS SUSTAINABLE  
DEVELOPMENT GOALS (SDGs)**



01

# GENDER

**Gender ranks fifth of all ten facets. Although most participating UK companies have focused on gender diversity for years, progress remains slow.**

## Leadership Progress

Gender has been a diversity, equity and inclusion (DEI) focus for many participating UK companies, who report that they have been working on increasing gender parity for at least 5+ years. Often, the companies surveyed say they have set goals of a 50/50 gender balance within the leadership team by the mid-2020s, but many have a long way to go to achieve that aim. Even though women in the UK workforce make up 47% (Catalyst.org, July 2020), only one-quarter (23%) of participating companies have at least 50/50 female representation on their Executive Leadership Team (ELT) and 29% have 50/50 female representation on their board. On average, companies' ELTs and board of directors were one-third women and two-thirds men. Qualitatively, this appears to vary widely by the type of industry with those in marketing, for example, achieving higher rates than those in manufacturing or technology.

## Understanding the Business Value

Having more women in leadership positions drives financial value for companies. According to McKinsey & Company, gender-diverse senior leadership teams outperform others by 21% (2018). Other studies have shown that women drive this value by bringing creativity, empathy and customer focus to the table (Shukla, 2021).

## Gender-focused Succession Planning

Ensuring the pool of future leaders is diverse to enable more women to rise up the ranks needs to start early and look beyond the next review cycle. Some of the companies interviewed have specific women leadership development and sponsorship programs which mentor up-and-coming talent and give them access and visibility. Gender specific talent and succession programs can amplify women's voices in their organisation, allowing women to grow their confidence and overcome imposter syndrome.

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## GENDER KEY FINDINGS

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**23%** of UK companies say they have at least 50% female representation on their ELT, while 29% said the same of their board.

On average, both ELTs and boards were made up of **one-third** women (33% and 34%, respectively).

**Three in four (71%)** have stated initiatives for increasing gender diversity in leadership and track progress toward it, with 75% saying they have stated objectives against this measure. Another 76% say they specify gender diversity when planning for leadership succession.

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## GENDER KEY RESULTS

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### 01

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Does your business have at least 50% representation of female or non-binary members on your senior leadership team?

Source Q3A(5)  
N=85

Yes **23%**

No **77%**

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### 02

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As far as you are aware, what number of your leadership team members **self-identify as female, male, or prefer to use another term?**

Source Q3B  
N=78

**33%** Female

As far as you are aware, what number of your board of director members **self-identify as female, male, or prefer to use another term?**

Source Q3C  
N=76

**34%** Female

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## 03

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**Does your business have stated initiatives for increasing gender diversity within the leadership team?**

Source: Q3A(3)

N=85

**Yes 71%**

**No 27%**

**Don't know 2%**

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## 04

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**Does your business specify gender diversity in leadership succession planning?**

Source: Q3A(2)

N=85

**Yes 76%**

**No 18%**

**Don't know 6%**

# GENDER RECOMMENDATIONS

“In the wake of COVID-19 we cannot rest on our laurels in terms of gender balance. Early reports suggest that women may have been disproportionately impacted and we need to understand why as we emerge. Continuing to monitor representation and progress is key and needs an increased focus on all genders, including transgender and non-binary – for example, only 34% of survey respondents currently ask their employees if they identify as transgender. Success looks like societal representation at all levels, including senior leadership teams and boards.”

**HELEN WEBB**, CHIEF PEOPLE AND SERVICES OFFICER, CO-OP

## 01

### **COMPLETE A DIAGNOSTIC REVIEW – ANALYSE YOUR DATA:**

Take action based on real, measured facts rather than ‘common sense’ or opinion. Bring the same standards of informed decision-making used throughout management to the business of diversity and inclusion (D&I). A full analysis can help your organisation understand where you may have equity issues and provide a data-based foundation in order to set goals and where to focus initiatives related to diversity, equity and inclusion (DEI).

## 02

### **TAKE A HARD LOOK AT YOUR TALENT PIPELINE:**

Look at the representation of women at the manager, senior manager, director, and vice president levels in your pipeline and find out if women are lagging behind. Open a dialogue with your management teams to understand where the pipeline is leaking. Don’t assume you know the answers or solutions. Find out what help is needed and consider all the options you are in a position to offer. Sometimes extra support, training, networking or flexibility is needed.

## 03

### **HOLD YOURSELF AND OTHERS ACCOUNTABLE:**

Parity needs planning. D&I goals are only realised when key decision-makers are accountable. Establishing realistic, achievable and relevant goals tied to accountability serves to drive change and results. Apply a gender lens to recruitment, retention and succession planning to foster the progression of all genders across the organisation. Set targets or goals to increase the representation of women throughout the pipeline.

## 04

### **INVESTIGATE HOW BURNT OUT YOUR WOMEN ARE:**

With lockdowns and working from home, studies continue to show burn out, stress and exhaustion continue to affect more women than men. To take pressure off, companies should consider establishing basic working norms, such as putting guardrails around off-hours communications and clearly setting expectations on response time. Equip managers with the support, training and resources to lead.

## 05

### **MAKE SURE YOU LOOK AT GENDER DIVERSITY VS. GENDER INCLUSION:**

Gender diversity and gender inclusion aren't the same thing. Ensure your organisation is taking a hard look at its culture. Simply raising the number of women that you employ, and ticking off that box, doesn't guarantee that you've built a work environment of equal opportunities. Is your organisation's culture gender-inclusive or does it make some people in the room feel that they don't belong there? Organisations can also revisit and improve their procedures, including flexible working, parental leave, job sharing and many more.

## 06

### **MAKE YOUR GENDER DIVERSITY AGENDA INCLUSIVE OF NON-BINARY OPTIONS:**

Non-binary individuals often experience significant rates of discrimination in the workplace and can feel excluded from a gender diversity agenda. One first step can be ensuring that workplace surveys and forms provide options that use gender-inclusive language (parent/guardian/partner, etc.) and include non-binary as an option for self-reported gender. This allows accurate collection of data and signals acceptance and understanding of gender differences.

"It's encouraging to see the extent to which companies have prioritised gender in their plans, but also disappointing that representation is still relatively low at the leadership level. We need to ask ourselves whether we consider this an acceptable rate of progress overall, and to acknowledge that progress is not spread equitably. Gender advancements have to be viewed through the lens of intersectionality, reflecting the differential experiences and outcomes for women depending on other diversity characteristics, such as ethnicity, socio-economic status and sexuality. I look forward to seeing further progress in future reviews, so that women and non-binary people from all backgrounds have equitable access to opportunities and can contribute to better business outcomes and cultures."

**DR HAYAATUN SILLEM CBE**, CHIEF EXECUTIVE OFFICER, ROYAL ACADEMY OF ENGINEERING

"Taking some time to be reflective on the importance of inclusion and diversity is always time well spent. Being in a position to share LexisNexis® Risk Solutions' outlook on the progression of our gender representation, development and overall inclusion goals and discussing their progress is a great privilege. Reporting and sharing our inclusion goals in this area helps to accelerate action and enables us to move the dial in sponsoring, developing, profiling and promoting women to senior roles. I am empowered by the journey we have begun and looking forward to sharing some of our great initiatives to help encourage other businesses to not be afraid but have courageous conversations on the importance of diversity and how we can remain accountable to achieve equity."

**CHARLENE OKE**, SENIOR DIVERSITY AND INCLUSION PARTNER, LEXISNEXIS® RISK SOLUTIONS

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# CASE STUDY

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# LEXISNEXIS<sup>®</sup> RISK SOLUTIONS

**As a technology, data science and AI business, we knew we needed to do something to address the gender gap in technology, so decided early on to set some inclusion goals aligned to women in line management, senior leadership and women in technology.**

Our goal for 2025 is to reach 41% of women in line management (37% in Jan 2021), 30% of women in leadership (24% in Jan 2021) and 28% of women in technology (26% in Jan 2021).

In order to meet these targets we decided to focus on mentoring, coaching and sponsorship of our female employees, launching Ignite and Accelerate. The program is not about fixing women, but rather to find a better way to elevate, amplify their voices, and give them visibility.

Essentially, it is a 12-month sponsorship journey where each female leader is aligned with an internal and external coach, while linked to a male executive sponsor. Female leaders first go through a 360 review, which allows sponsors and coaches to better understand their strengths and opportunities, helping to guide those ongoing conversations.

We then set up multiple networking events throughout the year and they meet regularly with their sponsor, helping to nurture that important sponsor-sponsee relationship. Some of the networking events also include members from our parent company, allowing this group to spread their wings further.

In addition, each female leader is given executive coaching sessions facilitated by a third party. And the program includes ongoing development sessions which focus on the things we know women struggle with more than men, such as recognising their brand, imposter syndrome, their presence, etc.

After three cohorts with 49 female leaders so far, the program is seeing some incredible results! Since its launch, 86% of the female leaders who participated have stayed on at LexisNexis® Risk and we are well on our way to hitting our gender targets for 2025 early. As of the end of 2021, we closed the gap of women in line management by 5%, [OC(S1)] women in senior leadership by 3% (now 27% of our workforce) and are still well ahead of the industry average for women in technology (27% vs. 17% of the industry average).

With such a successful program we are setting our sights on the intersectionality of diversity, and have launched Black Women Leading, a very similar program but includes some of the unique aspects of being a Black woman working with the challenges in professional environments that have bias.

For anyone looking to focus on gender parity, I would say, remember that every business is different. So make sure you're hearing from your diverse groups, whether that's through surveys, trialling a pilot or something else. You will only know what's right for your business by talking to your employees. Then look through your initiatives through a lens of how you re-ignite visibility and the voice of your current and future female leaders. And hold your leadership accountable by including them in the journey so they can live and breathe it. This is how it becomes so much more than a program and a true culture change.

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# CASE STUDY

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# DIAGEO

**At Diageo we are committed to creating the most inclusive and diverse culture, as well as shaping market-leading policies and practices because it is both the right thing to do, helps our business to grow and ensures we can attract and develop the very best talent.**

Driving change requires ambition and action and a culture whereby the responsibility for change is felt across the whole business. This is why we've set bold goals as part of our Spirit of Progress action plan, which include having 50% women in global leadership roles and 45% from ethnically diverse backgrounds by 2030.

In March 2021, we introduced global Menopause Guidelines which offer strengthened support and flexibility to employees going through the menopause and help all employees, female and male, understand how the menopause can impact individuals. The Guidelines have now launched in 20 countries, with more to follow, and our Spirited Women Network employee group plays a crucial role in helping to open up conversations about what is often a taboo subject.

To be truly gender equal and inclusive we must also make fundamental changes to our policies. Since 2019, when we started offering all female employees a minimum of 26 weeks of fully paid maternity leave, and a minimum of four weeks paternity, our people have taken more than 180,000 days of parental leave. In the last year we've also introduced global Domestic and Family Abuse Guidelines and Flexible Working and Wellbeing philosophies to ensure we foster an environment where all employees feel supported at work.

We're proud of our progress to champion inclusion and diversity with our employees, our suppliers, across our brands and within the communities in which we operate but we are learning every day and we know there is more we can do.

"No one prepares you for the impact menopause can have. I was exhausted, emotional and alienating myself from people at work. There isn't a one-size-fits-all solution, but Diageo's Thriving Through Menopause Guidelines have encouraged me and my colleagues to share our stories and seek the support we need for our careers to progress."

**JULIE-ANN ROONEY**, PERFORMANCE IMPROVEMENT LEAD, DIAGEO

# RACE AND ETHNICITY

**Race and ethnicity performs poorly relative to other facets, taking the number seven spot in our rankings. Many participating UK companies say they are doubling down on their efforts lately by setting targets and filling the new leaders pipeline with talent from more ethnically diverse backgrounds.**

## Renewed Focus

2021 has seen a renewed focus on race and ethnicity for many participating UK companies, often accelerated by the murder of George Floyd, with many saying they have stepped up their support for Black and other ethnic minority employees. Many of these companies have started a new, or reinvigorated their existing ethnic minority Employee Resource Groups (ERGs) to bring forth discussions. Some have reviewed their inclusivity training material to ensure it covers a broader spectrum of unconscious bias as well as more pronounced allyship. That said, only three in five of the companies we surveyed said they had a senior leader act as an executive sponsor for their ethnic minority ERG (59%), suggesting in some cases the efforts are more symbolic than systemic.

## Progress Needed at the Top

Leadership and board of directors groups are still predominantly White among participating companies. In fact, two in five do not have any ethnic minority representation on the senior leadership team (41%), and even when there is, on average only 14% are from a Black, South or East Asian, or other ethnic minority background with the remaining 86% coming from a White background. Board appointments fare slightly better with more companies saying they have at least some representation, but similarly to leadership, when there are ethnic minority members on the board, they make up only 21% on average.

## Building the Pipeline

The key is to not only attract talent from all different backgrounds, but also retain them through their progression within the company. Oftentimes, when Black, South or East Asian or other ethnic minorities are not developed in the same way as their White counterparts, intentionally or through unconscious bias, they leave the company, meaning the next generation of leaders does not include a pool of homegrown, ethnic minority talent. To combat this, just over half of UK companies we surveyed said they had dedicated outreach programs to recruit talent from Black, South or East Asian, or other ethnic minority backgrounds (53%), often in partnerships with universities, colleges and charities to recruit new, diverse talent early, as well as mentoring or sponsorship programs. Some companies, such as Accenture, go a step further and have implemented a sponsorship program for future Black leaders (see case study), with the intent of providing them with visibility and opportunity.

## **Making Commitments**

Over half of the companies we interviewed are publicly setting and tracking targets toward leadership progression, many of those within their annual reports. Some have signed on to Change the Race Ratio, adding external accountability beyond shareholders and employees, and committing to reporting on, and closing, the ethnic minority pay gap.

“Just over half of UK companies we surveyed said they had dedicated outreach programs to recruit talent from Black, South or East Asian, or other minority ethnic backgrounds (54%). These tend to be in partnerships with universities, colleges and charities to recruit new, diverse talent early, and “remove organisational barriers impacting underrepresented talent.””

**PAULINE MILLER**, CHIEF EQUITY OFFICER, EMEA, DENTSU

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## RACE AND ETHNICITY KEY FINDINGS

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**Two in five (41%)** say they have no ethnic minority representation on their leadership team to date, with a further 30% saying the same about their board of directors.

When there is ethnic minority diversity at the top, this makes up only **14%** of senior leaders and **21%** of board members, on average.

**65%** of participating UK companies say they include ethnic minority diversity in leadership succession planning, and another 58% actively monitor that progress.

**61%** have stated initiatives for increasing ethnic minority diversity at the leadership level.

**Three in five (59%)** say a member of the leadership team acts as an executive sponsor in an ethnic minority employee network.

**43%** monitor the pay and progression of ethnic minority employees.

**53%** have outreach programs to recruit talent from ethnic minority backgrounds.

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## RACE AND ETHNICITY KEY RESULTS

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### 01

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**Does your business report progress against measurable objectives for leadership team ethnic diversity across time?**

Source Q1A(1)  
N=85

Yes **58%**

No **40%**

Don't know **2%**

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### 02

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**Does your business specify diversity in leadership team succession planning?**

Source Q1A(2)  
N=85

Yes **65%**

No **28%**

Don't know **7%**

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## 03

---

**Does your business have stated initiatives for increasing ethnic minority diversity within the leadership team?**

Source Q1A(3)  
N=85

**Yes 61%**

**No 37%**

**Don't know 1%**

---

## 04

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**Does your business have members from your leadership team from a Black, South or East Asian, or other ethnic minority background?**

Source Q1A(4)  
N=83

**Yes 58%**

**No 41%**

**Don't know 1%**

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## 05

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**Does your business have a member of your senior leadership team act as an executive sponsor or formal senior champion for a Black, South or East Asian, or other ethnic minority background?**

Source Q1A(5)  
N=85

**Yes 59%**

**No 39%**

**Don't know 2%**

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## 06

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**Does your business have outreach programmes to recruit talent from Black, South or East Asian, or other ethnic minority background?**

Source Q1A(6)  
N=85

**Yes 53%**

**No 43%**

**Don't know 4%**

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## 07

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**Does your business monitor the pay and progression of ethnic minority employees against the rest of the workforce?**

Source Q1A(7)  
N=85

**Yes 43%**

**No 54%**

**Don't know 2%**

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## 08

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**As you are aware, what number of your leadership team members self-identify as being from a Black, Hispanic/Latino, South or East Asian or other minority ethnic background?**

Source Q1B  
N=41

**Yes 14%**

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## 09

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**As you are aware, what number of your board of director members self-identify as being from a Black, Hispanic/Latino, South or East Asian or other minority ethnic background?**

Source Q1C  
N=37

**Yes 21%**

# RACE AND ETHNICITY RECOMMENDATIONS

“McKinsey’s research has said for a long time that having an ethnically diverse board is associated with higher returns, yet the data collected tends to suggest that firms don’t really buy into that conclusion. Even where firms have any ethnic diversity, it is on average only 12% – likely to be one board or leadership team member. While this is the minimum recommended by the Parker Review, that is unlikely to be enough to deliver the sort of upside to business returns that the research shows is possible.”

**PAUL MONEKOSSO CLEAL OBE**, NED, GUY’S & ST THOMAS’ NHS TRUST, MET POLICE, BOARD ADVISER TO PREMIER LEAGUE

“The lack of ethnic minority representation on 30% of boards and on 42% of leadership positions is a disappointing and sobering reminder of the level of effort still required to achieve broader representation. The fact that companies who are reporting ethnicity pay gaps have no action plans to close the gap further supports my previous comment and draws out the need for executive sponsorship and allyship to drive desired change and outcomes.”

**MDUDUZI MSWABUKI**, PARTNER, EY UK FINANCIAL SERVICES, CO-CHAIR, DIVERSITY AND INCLUSION, PARTNER SPONSOR, EY RACE AND ETHNICITY NETWORK

## **01**

### **COMPLETE A DIAGNOSTIC REVIEW – ANALYSE YOUR DATA:**

Take action based on real, measured facts rather than 'common sense' or opinion. Bring the same standards of informed decision-making used throughout management to the business of diversity and inclusion (D&I). A full analysis can help your organisation understand where you may have equity issues and provide a data-based foundation in order to set goals and where to focus initiatives related to diversity, equity and inclusion.

## **02**

### **LOOK AT YOUR TALENT PIPELINE AND SET MEASURABLE GOALS:**

Identify levels of ethnic diversity using HR data and use this benchmark to explore any structural and cultural barriers that are maintaining workplace inequalities. Apply a race and ethnicity lens to recruitment, retention and succession planning to foster the progression of all minorities across the organisation. Review people processes to retain diversity. Identify barriers in career progression and 'cliff edges' where employees leave and address this. Also consider intersectionalities, such as the combined effect of race and gender, and examine progress from different angles. Ensure there is a link from the achievement of these goals to performance criteria and/or compensation for all senior leaders.

## **03**

### **BUILD AN INCLUSIVE CULTURE:**

Explore whether policies and practices are underpinned by principles that actively celebrate and encourage difference. Identify whether there are mechanisms in place to enable employees to voice issues about inequality and need for change. Take steps to understand how inclusive the workplace currently is, and what could be done to improve inclusivity.

## **04**

### **ENSURE LEADERS MODEL DIVERSITY AND INCLUSION:**

It is critical that senior leadership model D&I. When senior leaders own D&I and make themselves a part of the D&I management process, it sets the tone for the rest of the organisation to follow suit. Ensure leaders sponsor ethnic minority colleagues. Create a reverse mentoring scheme. Visibly use and champion employee resource groups.

## **05**

### **BECOME ANTI-RACIST:**

Don't just signal support – root out racism at your workplace. It's time to go beyond having a no tolerance policy towards racism and prejudice – and become anti-racist. Inaction is a form of action and adopting an anti-racist policy may involve redefining relationships to ensure that an active stand is taken and that leaders are held accountable. Anti-racist policies ensure the message is clear – you do not agree or tolerate any form of racist behaviour.

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# CASE STUDY

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# ACCENTURE

**We would love to see a future where we no longer need diversity and inclusion (D&I) initiatives.**

At Accenture, we would love to see a future where we no longer need inclusion and diversity initiatives, one where every organisation ensures that all employees can grow and develop, have relationships to thrive and have a sense of belonging. And while this is the right thing to do ethically, we also know it's vital for innovation because if everyone looks and thinks the same, new ideas are hard to come by. And an inclusive and diverse workforce can be 40% more productive.

We have tried a few different things over the years, such as leadership development programs for Black employees, but soon realised this isn't the right thing. That's because there is nothing wrong with the talent, no need for remedial training, but we do need to change the workplace culture to really foster that sense of inclusion and belonging for all.

So, this year we started Engage, technically a program but really much more of a journey, focusing on emerging Black talent within our UK business. Here we bring together a small group of high-potential Black employees, their line managers and sponsors (senior leaders who can give them a voice and power within the organisation). And that is what makes Engage so different: it's not just the talent, it is the people leads and sponsors as well, driving a culture shift at numerous levels.

Over the course of six months, sponsees meet with their sponsor and their line manager every month (separately) to build and nurture those relationships. This helps us create advocates who are standing with, not standing by, as well as giving the sponsee that person who talks about them when they're not in the room – the person who can really help guide their journey and make them visible.

All sessions are co-facilitated by one Black and one White facilitator, who can provide guidance through some fairly difficult conversations. For us, it's critical that each facilitator is a good listener with a growth mindset, is able to build connections, is a strong people developer, and is comfortable being vulnerable. And they need to be able to facilitate without teaching.

Our sponsors are predominately White which makes for uncomfortable conversations at times, but that's necessary. It allows the sponsee and sponsor to talk through their fears together and build something very unique and powerful.

When we first started talking about Engage, we encountered a lot of scepticism and questions around what makes this program different. Instead of trying to convince people, we acknowledged their concerns and just asked them to come along on the journey to see for themselves. But now, as we are coming to the end of our first cohort, we are learning and tweaking the program for the next group and have leaders actively asking to be a part of it.

For anyone looking to drive their D&I strategy forward, we would say the most important piece is having buy-in but also active participation from the very top. Too often D&I is seen as HR's problem, or the D&I team's problem, and so on. It is only when everyone has the conversations and understands the challenges and the lived stories that true change can take place.

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# CASE STUDY

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# BRITVIC

**Like many organisations, the murder of George Floyd accelerated the work Britvic was already doing on race and ethnicity.**

In June 2020, the company launched B-Diverse, an employee network for Black, Asian and ethnically diverse colleagues, which was tasked with understanding the current landscape, suggesting improvements and setting targets for increased ethnic diversity in leadership.

To begin, the team knew they needed the right data, so they launched an internal campaign asking all employees to disclose their ethnicity. With an engaging video explaining why this was important and what Britvic planned to do with the data, the team established trust with employees – resulting in a 98% voluntary disclosure rate so far. The data showed that ethnically diverse representation in leadership was limited (2%) and there was no real pipeline in the company to nurture and develop the next generation of leaders. In order to address this, the team set about:

1. Launching a mandatory unconscious bias training course for all employees, with a dedicated module for line managers.
2. Adding critical steps to the recruitment process: mandating that all new hire candidate lists must be diverse before they can be shared with the hiring manager; and stipulating all hiring managers complete a mandatory training module on unconscious bias in recruitment before they can post any roles.
3. Developing its graduate programmes to ensure new hires come from more diverse backgrounds.

In order to hold itself accountable, Britvic set a target of 10% ethnically diverse representation in leadership in Great Britain and Ireland by 2025 (this has already increased from 2% to 5% in 18 months), and the team meets with executive leaders every month to report on progress. But internal accountability was not enough, so the company signed up to the CBI's Change the Race Ratio pledge, which publicly commits the company to this target as well as publishing ethnicity pay gap reporting for the first time in 2022.

All the efforts are paying off. Employee engagement scores have increased, particularly in terms of sense of belonging, and it has helped recruitment. Recent hires have said they joined Britvic because they wanted to be part of a company with this kind of culture – one that is focused on diversity. And it has increased confidence among employees, with the company seeing and hearing more from people who didn't come forward before, uncovering more talent than previously thought. Overall, employees feel more empowered because they have a voice.

# SEXUAL ORIENTATION

**Sexual Orientation fares the poorest among the ten facets we looked at, ranking in last place. Little substantial progress seems to be made, particularly in how participating companies say they support this community beyond Pride month.**

## Little Substantial Progress

While many companies we surveyed support the LGBTQ+ community during Pride month and include training on this as part of wider conscious and unconscious bias materials, it still seems to be somewhat of a taboo topic. It ranks last among all ten facets we researched in 2021, largely driven by the low representation of LGBTQ+ members on senior leadership teams, as well as only two in five participating companies having a defined LGBTQ+ strategy. Given the sensitivity of the data, it is also infrequently tracked through voluntary surveys, leading to a full 37% of participating companies saying they don't know if they have a member of the LGBTQ+ community on their leadership team.

## Providing a Safe Space

Of participating companies, one in three have had senior leaders share personal stories more widely with the company. When they do, it has a positive knock-on effect, with others in the company feeling comfortable to disclose their status as well, or at a minimum feeling they are welcome. In our qualitative interviews, we came across companies who regularly go out of their way to share stories of LGBTQ+ members from all levels of the company, including such personal topics as transitioning genders. Encouraging active role models and fostering an open dialogue allows people to gauge what the reaction might be if they do decide to come out as LGBTQ+.

## Further Fostering Belonging

But our participants are quick to note this is not about getting as many LGBTQ+ employees to come out as possible. Rather, it is to allow everyone the time and space to make this decision themselves, if and when they are ready to do so. Suzie Welch from ODEON Cinemas Group says it's important for everyone to be their authentic self: "Most importantly, we don't want people to feel like they need to be one thing at work and another at home, but we also understand it takes time for people to gauge what their colleagues' reactions may be if they share something so personal." It is when people can truly be themselves that they flourish and provide value to the team and company.

"Despite changing societal attitudes, research shows that many people are still not comfortable being out at work. If we are to really make progress on LGBTQ+ inclusion, businesses need to make more of a concerted effort to ensure there are visible role models and an environment where our differences are valued, throughout the entire year and not just during Pride."

**FIONA VERNON**, SENIOR MANAGER DIVERSITY, EQUITY AND INCLUSION INTERNATIONAL MARKETS, WALGREENS BOOTS ALLIANCE

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## SEXUAL ORIENTATION KEY FINDINGS

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Only **one-third (34%)** of participating companies say they have at least one member from an LGBTQ+ background on their leadership team and another third (37%) don't know if this is the case.

**Two in five (40%)** say their leadership has shared LGBTQ+ stories with the rest of the organisation.

**41%** of companies say their leadership team has approved an LGBTQ+ strategy in the past 12 months.

Just over **one in three (35%)** say they gather and monitor data on the sexual orientation of their leadership team.

Of those who do, **almost all (96%)** include 'Bi' as an option, and **60%** include 'use another term'.

**47%** of participating companies ask if their employees self-identify as transgender.

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## SEXUAL ORIENTATION KEY RESULTS

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### 01

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**Does your business have at least one member of your leadership team from an LGBTQ+ background?**

Source Q2C  
N=85

Yes **34%**

No **24%**

Don't know **37%**

Prefer not to say **5%**

**Has a member of your leadership team done any of the following in the past 12 months?**

Shared the stories of any visible LGBTQ+ role models from the Leadership Team?

Yes **40%**

No **53%**

Don't know **7%**

Reviewed and / or approved an LGBTQ+ inclusion strategy?

Yes **41%**

No **53%**

Don't know **6%**

Source Q2B(3) and Q2B(4)  
N=85

**Has a member of your leadership team done any of the following in the past 12 months?**

(1) Act as an executive sponsor or formal senior champion for an LGBTQ+ employee network?

Yes **53%**

No **45%**

Don't know **2%**

(2) Met periodically with an LGBTQ+ employee network?

Yes **52%**

No **43%**

Don't know **5%**

Source Q2B

N=85

**Does your business gather and monitor data on the sexual orientation of its leadership team?**

Yes **35%**

No **58%**

Don't know **7%**

Source Q2A(1)

N=85

**Does the data gathered on sexual orientation include:**

(1) 'Bi' as an option? **Yes 96%**

(2) 'I use another term' as an option? **Yes 60%**

Source Q2A

N=35

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## **02**

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**Does your business ask your employees if they identify as transgender?**

Yes **47%**

No **51%**

Don't know **2%**

Source Q3A(6)

N=85

# SEXUAL ORIENTATION RECOMMENDATIONS

“I was somewhat surprised by the ranking of sexual orientation in the list of areas or dimensions that organisations are working on. It’s my experience in parlance with other organisations that this area ranks higher, so it tells me that this result indicates a change. While there has been much change and improvement on sexual orientation and equality, it is in my view an area that still needs much more work.”

**MARGOT SLATTERY**, GLOBAL HEAD OF DIVERSITY AND INCLUSION, ISS A/S

## 01

### **PROVIDE YEAR-ROUND SUPPORT – NOT JUST PRIDE MONTH:**

During Pride Month, many large companies take the opportunity to celebrate the LGBTQ+ community in myriad vital and visible ways. But creating a genuinely inclusive culture means taking year-round action. Take a hard look at the signals about whether your workplace is inclusive to the LGBTQ+ community—the type of language used, visuals on the website, options beyond male and female on the job application. Every time you say or do something inclusive, you give a positive signal: this is a safe environment where LGBTQ+ employees are respected and valued.

## 02

### **TAKE A HARD LOOK AT YOUR TALENT PIPELINE:**

The LGBTQ+ community is underrepresented in the workplace, especially at more senior levels. Look at the representation at the manager, senior manager, director, and vice president levels in your pipeline and find out if there is an issue. Don’t assume you know the answers or solutions. Open a dialogue with the community and the management team to truly investigate and understand what the obstacles are. When shaping your culture, representation matters. Seeing members of our community being hired and rising in the ranks of an organisation is crucial to building a culture of inclusion.

## 03

### **VISIBLE LEADERSHIP ACCOUNTABILITY:**

As a senior leader, public statements in support of the LGBTQ+ community set the tone from the top. Demonstrate that everyone will be held accountable for their behaviour and model inclusivity and allyship yourself. If you learn of, or witness behaviours, practices or language that are rooted in homophobia, transphobia or misogyny, acknowledge those wrongs and take immediate action to rectify them. Being LGBTQ+ is not “obvious” or “visible” diversity, so it’s important to make sure leaders’ voices are part of broader discussions about diversity.

## 04

### CREATE A LGBTQ+ NETWORK AND ALLY PROGRAMME:

A network means LGBTQ+ employees can meet in a safe space within their place of work to relate to one another. As a focus group, network members can also help you identify and improve upon issues affecting LGBTQ+ staff, so you can continually improve your approach. Create an ally program - visual signals, like allyship stickers, can really have an influence.

## 05

### MAKE YOUR POLICIES INCLUSIVE:

Ensure that the benefits your organisation offers are inclusive, such as insurance coverage for domestic partners, parental leave for adoptions and pension benefits.

“The numbers of people who come out at work are still low. We need organisations to positively encourage all to be part of this change and to feel free to be their authentic selves. We will also need to do more work globally on areas such as gender transition, transition policy, and intersectional areas to include greater depth in race and ethnicity, social inclusion, disability and education to ensure equality in all aspects of our lives.”

**MARGOT SLATTERY**, GLOBAL HEAD OF DIVERSITY AND INCLUSION, ISS A/S

“Sadly, there remains a lot of work that needs to be done to ensure that sexual orientation is taken into consideration as a true facet on the diversity and inclusion agenda.

It appears to be an issue on the side-lines for some organisations and not even considered by others. Only by incorporating the LGBTQ+ community in to the workforce and truly engaging and encouraging recruitment of LGBTQ+ employees at all levels, developing mentoring programmes, understanding bi-identities and the need for bi-visibility and inclusion in the workplace and creating a workplace that supports wellbeing and mental health, will we truly be formulating inclusive communications and working in truly diverse and inclusive organisations.”

**RUPINDER BAINS**, MD, PINDER REAUX & ASSOCIATES, BOARD MEMBER AT THE FOOTBALL ASSOCIATION AND BOARD MEMBER ON THE WOMEN’S FOOTBALL BOARD

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# CASE STUDY

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# SUPERDRUG

**At Superdrug and Savers, we are committed to being a truly inclusive workplace, with the diversity of our family at the heart of our brand.**

Inclusion and diversity, including our LGBTQ+ community, is at the centre of everything we do, from our internal initiatives to our customer facing brand campaigns. As a brand, we are a long-time supporter and ally of LGBTQ+ individuals both within our business and shopper communities. Internally, we have a long-established network for our colleagues which feeds into and shapes our strategies and brand identity. We want colleagues across our network to know that they can be the real them at work and we are committed to supporting them, either by signposting help available internally – through the network and the people they can talk to, as well as the support available externally.

We have a library of learning resources which includes how to be an LGBTQ+ ally, curated by our LGBTQ+ Network. We encourage everyone to utilise our Inclusion Learning Resources, not just those who identify with the communities they represent.

Each year, we celebrate Pride with our employees and customers, alongside other calendar moments, including National Coming Out Day, LGBT History Month, Trans Awareness Month to name a few. In 2021, we continued our longstanding four-year partnership with Unilever, with donations of £50,000 to Switchboard supporting their essential charity work.

In 2021, we also focused on raising awareness of non-binary and trans identities, with a relaunched and updated Gender Identity & Expression policy and supporting toolkit, to help employees and managers. LGBTQ+ eLearning for all was launched, with an educational session for senior leaders led by LGBT Switchboard. We also ran bespoke training with our Nurse population so that could deliver a better, more inclusive service to our trans customers. We shared educational content across our channels to help people understand why pronouns are important and encouraged our employees, where comfortable, to share theirs. Our exec sponsor and CEO led the way, sharing their pronouns, and we've now launched pronoun badges into store to ensure shoppers feel more comfortable when visiting us on the high street.

Our belief is that we, as individuals, have the right to self-identify and as a business we strive to create an inclusive and diverse environment where everyone can be their authentic self.

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# CASE STUDY

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## MITIE

**With over 75,000 colleagues, Mitie has representation from all ten facets explored in the McKenzie-Delis Review, and strives tirelessly to ensure that diversity, equity and inclusion (DEI) is weaved into everything the company does.**

When its Group HR director, who sits on the executive team, was becoming a mother, a blind spot opened up with regards IVF treatment and same-sex parents.

During the company's executive roadshows, she shared her experience and other barriers she has faced within the working world as someone who identifies as LGBTQ+. Mitie's Group HR Director had undergone IVF and her partner carried their child. Mitie's policy at the time did not include her situation and so at first she did not qualify for leave to attend IVF appointments. Equally, the pronouns in Mitie's parental leave policy did not account for same-sex parenting. As the executive sponsor of the LGBTQ+ network, Proud2Be, she was able to raise the issue with the rest of the executive team, leading to the company reviewing what parental leave looks like for all employees.

In her discussion at the executive roadshows, she opened the door to who she was as a person and showed the hurdles that had to be overcome, including how she helped the business overcome them. Making her a visible role model. In her honesty, she demonstrated vulnerability, which encouraged more people to join the LGBTQ+ network and led to an increase in activity within it.

Her position as the Group HR Director ensures that DEI is a driving pillar of the business culture within Mitie. One of the company's five core values is 'Our diversity makes us stronger' and that strength is demonstrated by the business not shying away from DEI, but always striving towards a more inclusive workplace for all. DEI is not an option at Mitie, it's part of the cultural identity.

To further foster inclusion and belonging, Mitie provides bespoke conscious inclusion training using its own colleagues to deliver thought provoking learning bursts. The training looks at where biases come from and how to challenge them, as well as specifics of what is OK to say and what is not. And the company has clear LGBTQ+ guidelines for managers on how to speak with colleagues who want to share personal information.

The impact on colleagues has been increased confidence and an overall culture that is more open. Colleagues are more willing to share who they are, including beyond sexual orientation, and they are more comfortable to have those discussions with their managers. It has normalised the conversation and equipped line managers with confidence to have related discussions with employees. But Mitie stresses there is more work to do in an ever-changing world of sexual orientation, and diversity more generally. The key for Mitie is to focus on change for its people as its first priority, before deciding how that shows up externally.



# DISABILITY

**Disability ranks in sixth place. While almost all participating UK companies say they offer workplace adjustments, only one in three say they are actively looking to promote or hire new staff with disabilities.**

## Gaining Momentum

Although performing in the bottom half of our ten facets, from our qualitative interviews we heard disability inclusion and diversity is starting to gain momentum for some of the companies we surveyed. The participating companies that focus on disability not only have specific buddying and coaching support for employees with disabilities, but also train line managers on how to best support them. Many said they were increasing their focus on disability in 2022 with the creation of, or further engagement with, a dedicated Employee Resource Group (ERG) and creating awareness and understanding of the many aspects of both visible and invisible disabilities. There is still work to be done however, with only one in three having measures in place to promote and increase the number of disabled staff on the team.

## Visible and Invisible Disabilities

Visible disabilities tend to be easier to spot and often require clear workplace adjustments, such as accessibility options. Our survey participants struggled more often with how to support those with invisible disabilities, both physical and mental. Even clarifying what accounts for an invisible disability, particularly as some converge with mental health, can be a challenge. No matter what types of disabilities employees have, participating companies caution to be mindful that not all those with a disability will be comfortable to be identified as such, and could in fact, have legal implications if identification is made without permission.

## Creating Equality

From our qualitative interviews, it is clear that the participating companies who have taken concrete steps to increase diversity, equity and inclusion (DEI) for persons with disabilities are not underestimating this group. The same standards are set for persons with disabilities as others, albeit with some additional support and mentoring as needed, meaning stigma or any feelings of preferential treatment by non-disabled employees is mitigated. In turn, a culture shift is created wherein persons with disabilities are not seen as a separate group of people with special consideration, a de facto exclusion as per Dr. LaMondre Pough from Billion Strong, but rather a true integration within the workforce. Dr. Pough stresses the need to build environments where people can develop a sense of belonging.

## Go to the Experts

Of the UK companies we interviewed who were focusing on disability, all said they enlisted the help of the community and / or experts to first gain an understanding of the many complex issues involved. Some started with asking employees with disabilities to share experiences and workshop the most effective strategies required for a more inclusive workplace, while others enlisted the help of dedicated organisations to help them navigate the many potential pitfalls. Either way, Dr. Pough cannot emphasise enough that the community must be involved when driving decisions: “Nothing about us without us.”

“It is with concern and disappointment that so few organisations are seeking to increase the representation of employees with disability within their talent pool and indicates a lack of understanding and appreciation of the unique skill set and experiences that people with disabilities bring to an organisation.”

**JOANNA ALLEN**, CEO, GRAZE

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## DISABILITY KEY FINDINGS

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**88%** of participating UK companies say they encourage honest discussions around disability in the workplace.

Of the UK companies surveyed, **close-to-all** organisations support their staff with disabilities with the most vital aspects to do their jobs, with **97%** offering workplace adjustments and **91%** having employee assistance lines or occupational health services geared toward employees with disabilities.

However, only **two in five (39%)** provide further support in the form of mentoring, coaching, or buddying for employees with disabilities. And only **33%** train and equip staff and line managers with specific training around disability, with many others saying they do so “on requirement” as the need arises.

**Just over half (55%)** say they identify and share best practices for recruiting and retaining staff with disabilities, but only **34%** say they are actively looking to promote or increase the number of staff with disabilities.

**37%** train line managers to recognise and support those who are neurodiverse.

**One in three (37%)** have a written policy on digital accessibility.

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# DISABILITY KEY RESULTS

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Does your business do any of the following?

## 01

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Encourage open discussions about disabilities and health conditions?

Yes **88%**

No **12%**

Source Q6A(3)  
N=85

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## 02

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Provide staff with specific training around disability?

Yes **33%**

Provide mentoring, coaching, buddying or other support networks for employees with disabilities?

Yes **39%**

Provide occupational health service or employee assistance lines for disability concerns or issues?

Yes **91%**

Offer workplace adjustments?

Yes **97%**

Source Q6A  
N=85

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## 03

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Identify / share good practices for recruiting and retaining staff with disabilities within the organisation?

Yes **55%**

No **45%**

Have measures in place to promote and increase the number of staff with disabilities?

Yes **34%**

No **66%**

Source Q6A  
N=85

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## 04

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Have written policies on digital accessibility?

Yes **39%**

No **49%**

Don't know **12%**

Source Q6A(8)  
N=85

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## 05

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Provide training to line managers on how to recognise and support employees with mental health vulnerabilities or who are neurodiverse?

Yes **35%**

No **55%**

Don't know **10%**

Source Q9A  
N=85

# DISABILITY RECOMMENDATIONS

“Just over half of respondents say they identify and share best practices for recruiting and retaining disabled staff, so there is a significant way to go. And only 34% say they are actively looking to increase the number of disabled staff members with specific measures.

Ultimately, this is about talent. We see that diverse teams – with people who bring different life experiences, skills and who think differently (literally for people who are neurodiverse) are more creative, more innovative and ultimately, more successful. And, with skills shortages in many sectors – exacerbated by Brexit – business simply cannot afford to exclude a significant talent pool.”

**DIANE LIGHTFOOT**, CEO, BUSINESS DISABILITY FORUM

## 01

### **MAKE SURE YOU HAVE A DISABILITY EMPLOYEE RESOURCE GROUP CHAMPIONED BY A SENIOR EXECUTIVE:**

Assemble a cross-functional team from across the business to join the ERG. Over 90% of disabled people have conditions which are not immediately visible. Creating a supportive network where people feel able to ask for the support they need is key to employee productivity and enabling everyone to bring their “whole selves” to work.

## 02

### **TAKE TIME TO UNDERSTAND PERSONAL CIRCUMSTANCES:**

No two disabilities are the same and taking time to understand individual strengths and barriers is critical to success. Ensure targets, training and development plans are personalised in order to help people achieve, progress and ultimately lead.

## 03

### **EVALUATE YOUR RECRUITMENT STRATEGIES AND PROCESSES:**

People with disabilities represent one of the world’s largest untapped talent pools. With companies facing distressing levels of turnover, broadening your recruitment strategies can pay big dividends.

## 04

### **DRIVE INCLUSIVE DESIGN AND COMMUNICATIONS:**

Design with disability in mind. Involve disabled people from the start and build in “road bumps” and user testing so that as you develop a new product, policy or process, you review it with an accessibility and inclusivity lens. Commit to reviewing external and internal communications and developing easy-read/accessible communications and use video and audio to communicate key messages simply and with clarity.

## 05

### **BUILD AND SUPPORT NEURODIVERSITY IN THE WORKPLACE:**

Adjust your hiring practices to reframe their idea of what makes a “good candidate.” Soft skill training is a critical part of building a neurodiverse workforce, not just for neurodiverse employees, but for all employees and especially managers, who need to be educated about what it’s like to be on the spectrum. Individuals with neurodiversities may be sensitive to things like temperature, sound, and lighting. Be prepared to provide accommodations such as noise-cancelling headphones, privacy rooms, or flexible work schedules, so employees can be their most productive.

“The findings show that 97% of respondents offer workplace adjustments. This is encouraging; often an effective workplace adjustment is the difference between a disabled employee thriving or simply surviving (or not) at work. However, what this headline figure does not tell us is whether disabled employees are aware of adjustments that are available, or whether they are effective once made. As 90% of disabilities are not immediately visible, it is likely that many businesses have a significant issue with “covering” and people not feeling able to self id and share a disability or long-term condition. Organisations that are truly “Disability Smart” need to equip managers with the tools, skills and confidence to have supportive conversations with every member of their team and to create a culture where people feel safe to ask for the support they need.”

**DIANE LIGHTFOOT**, CEO, BUSINESS DISABILITY FORUM

“For organisations seeking to fulfil their commitment to support employees with disabilities, the immediate opportunity is to do that by launching a disability ERG. It can bring multiple benefits including sharing lived experiences across organisations, operating as an insight forum to understand how to proactively better serve people with disabilities as an employer and a business, and function as a test bed for technology accessibility which can benefit all employees.”

**JOANNA ALLEN**, CEO, GRAZE

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# CASE STUDY

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# SOFTCAT

## **Softcat started tackling disability from a diversity and inclusion (D&I) perspective in earnest mid-2021.**

The company already had Employee Resource Groups (ERGs) for gender, ethnicity, LGBTQ+, family, faith and armed forces, but not for disability. Knowing how important this is to those affected, either directly through visible or invisible disabilities or neurodiversities, or being a care giver, family member, friend or colleague for someone who does, the team decided to set up an additional ERG. The first step was reaching out to all employees, those who identify within this community in addition to those who don't identify but have a keen interest to support, to ask if they wanted to help define the strategy of the group.

Out of 1,800 employees, 32 came forward, becoming the founders of this network called Empowering Disability and Neurodiversity (EDN). This group came together in multiple workshops to share their experiences and specifically how having a disability or neurodiversity impacts their experience at work. Out of the workshops came three main aims of the network: to empower members and colleagues through education and awareness, to support our people by maintaining a community that allows us all to thrive, and to celebrate our differences and what makes us unique. Other focuses became clear in reviewing recruitment practices, physical office improvements to enable better accessibility, and finding IT solutions or programs to help those with different learning styles or needs.

The EDN team went straight to work on those aims, earning Softcat the accreditation of being a disability confident employer. This has helped with recruiting the right talent, but the network is also making strides internally. When the EDN team launched to the rest of the company, an online panel discussion of four founding members was seen by a large portion of the company, helping to raise awareness of the topic and aid in normalising the conversation within the workplace.

It has executive sponsorship from the company's Services Operations Director who has a personal connection to the network. Being willing to share that openly with the wider community has helped grow EDN to 80 members. Being a role model from the senior management team who candidly speaks of his own experiences has meant other employees who may not have come forward before are now sharing very personal stories. Many have said they have never felt so welcomed or that this is the first company they have felt safe to speak openly about this topic.

While EDN has made great strides in just six months, the work is not over. The team is continuing to tackle processes, creating awareness across the company and incorporating disability and neurodiversity into Softcat's wider allyship programme. And for 2022, some EDN members are being trained as mental health first aiders to be that extra support for those within the community who need it.

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# CASE STUDY

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# PAGEGROUP

**At PageGroup, diversity and inclusion (D&I) is not just a responsibility; it's a way of life.**

It all started ten years ago and we have never looked back. PageGroup is all about people. The people that work here, the companies we do business with, the candidates whose lives we change daily for the better and the communities and individuals we help as we give back to others.

**2021 has been an incredible year for us when it comes to disability inclusion. We made Disability Confident Leader, and won the award Getting Started within the Recruitment Industry Disability Initiative (RIDI).** In addition, we launched Clear Talents, a platform to support all employees with any workplace adjustments, so that they can thrive at work. Taking the time to make sure that people with disabilities can self-advocate is vital. We have a wheelchair user leading our disability inclusion strategy with our clients; we hired an intern from Ambitious about Autism for our D&I team and within Business Technology, our accessibility is being reviewed by an employee who is visually impaired. By doing this, we have been able to gain their unique and authentic perspectives on the work we are doing with/ for people with disabilities.

Our CEO, Steve Ingham is a wheelchair user, and the care and understanding he brings has allowed us to make giant leaps with our D&I. He is a senior sponsor and has led the launch of our 'Hidden Talents' campaign promoting our commitment to disability inclusion externally and collaborating with Lord Shinkwin to drive parliamentary action.

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# CASE STUDY

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## AVIVA

**AvivAbility is one of Aviva's six employee communities, this one focusing on persons with visible and/or invisible disabilities.**

With two dedicated co-chairs and two executive sponsors, the community set its goal to gain accreditation from the Business Disability Forum. Over the course of 2021, the team set out to understand the experiences of colleagues who are differently-abled, review current processes and policies, and speak with stakeholders across the business to understand challenges and barriers.

Through this work, the AvivAbility team has been embedding inclusivity in the business by implementing these key initiatives:

- Setting up the Accessibility Champions Group which conducts weekly workshops on how to make Aviva's communications and products more accessible – a group open to anyone in the company
- Ensuring all offices are fully accessible and instituting a workplace adjustment passport – this is a document summarising any reasonable adjustments made for an employee, accessible to the employee and respective line manager
- Training employees on how to speak to vulnerable customers – led by doctors who shared how they respond with empathy in difficult situations, such as providing a cancer diagnosis to a patient
- Creating a dedicated module for managing employees who are neurodiverse and making reasonable adjustments
- Setting up an anonymous mailbox to connect employees looking for support with those who are experiencing or have experienced something similar

The team is also collaborating with other employee resource groups to encourage intersectional progression. For example, in August 2021 the AvivAbility and Pride communities came together to run a joint event on the parallels of coming out about one's disability and coming out about one's sexual orientation, in the hope of creating more human connections and shared experiences. Feedback from participants signalled it was a success, with comments akin to "I didn't feel I was gay enough / disabled enough, but your session made me realise that I can participate."

The team's work has been paying off externally as well. Aviva has recently been awarded a Silver Standard Employer by the Business Disability Forum, one level higher than the team's ambition to be awarded Bronze. However, the team knows this is no place to stop. The AvivAbility community are working with the Inclusion team to look at the gaps in the disability space and do more to support differently-abled colleagues and achieve a Gold Standard Employer accreditation.



# AGE AND GENERATION

**Age ranks in second-last place of our ten facets. While more general policies such as flexible working benefit older workers, the number of participating companies who say they focus on older workers through line management training, knowledge sharing or peer support networks is low.**

## Supporting Older Workers

Older workers of participating UK companies are benefiting from wide-ranging work flexibility, often instituted or expanded during the pandemic, including work from home, part-time or reduced hours and opportunities to change roles or retrain. However, further dedicated support once older workers come onboard is less common. Only one in three companies surveyed provide specific age diversity training to line managers, and very few have any sort of peer support network for older workers.

## Reducing Age Bias

That said, the participating companies who are taking steps to reduce age bias are tackling recruitment, training, awareness and other support. In our qualitative interviews, companies shared how they re-evaluated their recruitment process by blinding CVs, including banishing years of experience as an example. We heard of companies who included age-specific modules in their learning platforms to reduce bias. Others turned to sharing stories to better understand lived experiences. One company has a reverse mentoring program, so all generations, regardless of level within the organisation, can benefit and learn from each other.

## Important Topics for Older Workers

Some participating companies tapped into important topics for this group, such as feeling valued, retirement and menopause. In our qualitative interviews, we heard how older workers, particularly in companies with a younger workforce, can feel self-conscious, forgotten or less skilled. These issues were tackled with specific training, reverse mentoring and open forums where they could be raised. Other companies created learning sessions dedicated to older workers in the likes of “As You Approach Retirement”, setting them up for a successful transition, while others set up employee resource groups and support dedicated to menopause. For one company we interviewed, supporting employees at important life stages was key, particularly for women who take a leave of absence. In the case of menopause, this company updated its leave policy to support women who need to take time off and created guidelines for managers so they can be mindful of what women might be experiencing.

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## AGE AND GENERATION KEY FINDINGS

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Work flexibility is high among participating companies, with most saying they allow all to work from home (**96%**), part-time or reduced hours (95%), the opportunity to change roles and / or retrain (90%), or take sabbatical leave (75%).

**All participating companies** support employee wellbeing, such as having an occupational health service.

Data collection on age diversity is high, with **88%** saying they collect and monitor this data.

**63%** of participating companies have specific measures in place to reduce age bias in recruitment, as well as ensuring best practice sharing and learning across generations (66%).

However, further support once older workers come onboard is less common, with only **one in three** (33%) providing specific age training to line managers on how to support age-diverse teams, and few saying they have a peer support network for older workers (19%) or training specifically for older workers (15%).

Of participating companies who disclosed age, on average **72%** of board members were 50 years or older, and only **1%** were 35 or younger.

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## AGE AND GENERATION KEY RESULTS

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### 01

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Which, if any, of the following opportunities does your business offer? Please select all that apply

Opportunity to work from home **Yes 96%**

Opportunity to gradually reduce working hours / work part-time **Yes 95%**

Opportunity to change role types (re-train) **Yes 90%**

Opportunity to take sabbatical leave **Yes 75%**

Source: Q5B  
N=85

Does your business support employee health and wellbeing, for example, by providing access to an occupational health service?

**Yes 100%**

Source: Q5A(5)  
N=85

Does your business gather data to monitor the age diversity of your workforce?

**Yes 88%**

**No 11%**

Source: Q5A(1)  
N=85

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## 02

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### **Does your business:**

Provide opportunities for knowledge and skills sharing between different generations? **Yes 66%**

Have measures in place to reduce age bias in recruitment? **Yes 63%**

Provide training to line managers on how to support age-diverse teams? **Yes 33%**

### **Which, if any, of the following opportunities does your business offer? Please select all that apply**

Peer support network for older workers **Yes 19%**

Training and development programmes specifically for older workers **Yes 14%**

Source: Q5A(5) and Q5B  
N=85

### **How many of your Board of Director members in the UK fall into each of the following age brackets?**

35 and younger **1%**

36-49 **27%**

50 and older **72%**

Source: Q5C  
N=57

# AGE AND GENERATION RECOMMENDATIONS

“It’s good to see so many employers are monitoring their age diversity. Now they need to put the culture and training in place to make the most of it.”

**CAROLE EASTON**, CEO, CENTRE FOR AGEING BETTER

## 01

### **ADD AGE TO THE COMPANY’S DIVERSITY, EQUITY AND INCLUSION STRATEGY:**

Ensure that age is a key area to track and measure in recruitment, talent development and succession planning. Develop age diversity training for managers and staff to address issues related to ageism. Assess workplace policies, practices and protocols to ensure that they are meaningful to employees regardless of their age or life stage.

## 02

### **USE DATA TO UNDERSTAND YOUR WORKFORCE:**

Employers need to analyse their data by age to understand whether they are treating older candidates and employees fairly when it comes to recruitment, performance, training and progression. Use strategic workforce planning to understand the diversity and skills profile of the workforce and the extent it is equipped to meet the organisation’s future skills and labour requirements. Use this data to inform recruitment and people management and development practices.

## 03

### **IMPROVE RECRUITMENT PRACTICES TO ELIMINATE BIAS:**

Test the wording of your job adverts to see how it affects who applies. Group and anonymise CVs when reviewing them. Pre-commit to a set of interview questions that are related to performance on the job. Focus interviews on collecting information, not making the decision.

## 04

### **INTRODUCE REVERSE MENTORING SCHEMES:**

Encourage a learning and development culture organisation wide. Encouraging the relationships between different generations, levels and diversities across the workforce promotes professionals to share their knowledge and experience while creating a harmonious and more engaging environment within which to work.

## 05

### **OFFER FLEXIBILITY AND PHASED RETIREMENT OPTIONS:**

Have open and honest conversations with older workers without making assumptions about their retirement intentions. Offer flexible working. Changes in working arrangement can support those with changing health, energy or caring responsibilities.

“Although many companies do not have dedicated policies specific to age. There is no doubt that the equality act and specifics to age discrimination which prevent the request for age have meant that individuals are being selected or deselected by their ability to do the job as opposed to their age.

I am confident that this will continue and therefore feel less concerned that dedicated policies are in place. There is still some stereotyping in existence but think this will change in time.”

**SAM ALLEN**, MANAGING DIRECTOR, SAM ALLEN ASSOCIATES

“As an older employee, I consider myself very privileged to still be working. I am a firm believer in the value older employees can bring to an organisation and the need for ongoing support and development. I also continue to worry about those at the other end of the scale, those that have recently started employment, the lack of contact with colleagues, learning from others, feeling part of a team, etc.”

**ANDREW ALLNER**, CHAIRMAN, SIG GROUP PLC

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# CASE STUDY

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# SAGA

**Saga is well known as the UK's specialist in products and services for people over 50, but we also aspire to be an employer of choice for older workers too - championing age at work and challenging ageism in society.**

Earlier this year we relaunched our brand to take this a step further, celebrating 'Generation Experience'. Through a new advertising campaign called 'Experience is Everything', and a suite of policies and initiatives, over time our aim is to change the way people think about age and show the more positive side of getting older.

Towards the end of 2021, we identified a policy that we knew would resonate with experienced workers, and help drive a debate externally on the value we as a society place on them. That policy is Grandparents Leave, giving all colleagues up to one week of paid leave each year, upon the arrival of a new grandchild. There are no eligibility requirements or strings attached – just a week off for our colleagues who become grandparents (or great-grandparents), to spend precious time with their new family member. When we announced the policy in December 2021, we were taken aback by the positive response – including mass media coverage and support from the likes of Gransnet, Harriet Harman MP and Esther Rantzen. The media debate continues to this day.

Grandparents Leave is not only about supporting our colleagues in their personal lives, it is also about recognising the huge contribution older people have at home with caring responsibilities. We enhanced our maternity and paternity policies earlier this year, and recognising the contribution of grandparents felt like a natural next step. Our hope is that other companies introduce this leave and that we continue to collectively shape the conversation around age at work.

In addition to Grandparents Leave, we are also championing experience in the workplace by actively recruiting workers over 50 – recognising the huge value that experience brings into our business. We regularly hold diversity discussion groups, and a recent session we held on 'age at work' brought to life the impact of employment on some of our older colleagues. These colleagues shared that they faced real challenges in securing work before joining Saga, and described the hugely positive impact that employment and ongoing learning opportunities have brought to their lives.

We are also a member of the Menopause Friendly Accreditation Programme and are working with our new partners to be an accredited employer. We introduced a Menopause Policy last year with a brilliant external speaker joining us for the launch, and we intend to further highlight menopause awareness during our celebrations for International Women's Day in March.

We have no intention to rest on our laurels and we know there is much more to do to improve diversity in the workplace and the value we place on experience. You can expect lots more from us in 2022, as we press on with our brand campaign and continue a new, positive conversation on age.

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# CASE STUDY

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# CENTRE FOR AGEING BETTER

**Flexible working** – Employers don't need bespoke flexible working policies for different generations. Research conducted by the Centre for Ageing Better shows that explicitly promoting generic policies to older workers is enough to make a big difference. Flexible working is the key change that retired workers say would have encouraged them to stay in work for longer – and it should be part of all our working lives. Having the right to request flexible working from day one in a job will help to change the culture within workplaces, making it easier and more comfortable for people to discuss their working patterns. This will ultimately broaden the roles that over 50s consider applying for or help older workers remain in work for longer.

**Occupational health** – Occupational health policies are important to have – but too often they are poorly applied by line managers, or little used by older workers who fear being 'written off'. If employers signal that access to adjustments is a normal part of working life, and train their managers to offer it, they will retain valuable staff – and ward off the risk of discrimination.

**Recruitment** – It's good to see so many participating employers reporting that they have policies to remove age-bias from recruitment. But with one in six older workers (one in three from a Black, Asian and minority ethnic (BAME) background) reporting direct experiences of age discrimination in recruitment, we have to ask – are they working? Effective practice means scrutinising your recruitment data, de-biasing job adverts, and taking dates out of job applications. Those employers who introduce such policies – and make sure they translate into everyday practice within their organisations – have much to gain, and we hope that others will follow suit.

**Data** – Executives might look around their top team and conclude that their organisation has no problem with age diversity. But the experiences of people in the most senior posts may not translate further down the organisation. That means scrutinising the data is key: not just looking at the headline age profile of the organisation, but at where older workers are based, and how many are getting opportunities to progress, and how many are getting recruited vs how many apply.

“One in three workers in the UK is aged 50+.

The older workforce is the backbone of the workforce, and employers who don't adapt will find themselves unable to manage or retain their people. This challenge is being further intensified by the pandemic, which is seeing thousands of over 50s workers leaving the workforce prematurely, a phenomenon being referred to as 'the Great Retirement'.

This is bad news for the economy and for employers, exacerbating labour and skills shortages. The good news is that there are some simple steps employers can take to help them retain this experienced and important part of their workforce and enjoy the benefits of effective multigenerational working, including increased productivity. This includes promoting flexible working, removing age-bias from recruitment and making sure that workers of all ages are updating and building their skills.”

**CAROLE EASTON**, CEO, CENTRE FOR AGEING BETTER

# RELIGION OR BELIEF

**Religion takes the number two spot in 2021. This is mainly driven by most participating companies saying they encourage open discussion related to religion and promote the benefits of different beliefs.**

## Religious Tolerance is High

Participating companies scored second-highest in their efforts on religious inclusivity and diversity, with almost all saying they allow open discussions about religion and beliefs and most agreeing their workplace recognises the benefits of a wide range of religions. Similarly, the majority of companies surveyed allowed religious clothing or symbols, and time off for religious holidays. While most companies ask employees to take annual leave days for holy days, one company we interviewed has gone further by allowing employees to exchange bank holidays for any religious days they may need.

## Balancing Religion and Interpersonal Relationships

As most participating companies do allow open conversations on religion and appreciate the diversity this brings, it can also create tension when religious or non-religious beliefs clash. The companies we spoke with said they avoid conflict by encouraging employees to be open about their faith and associated values, but setting clear guidelines on what constitutes professional business conduct at the same time. This means that oftentimes religious conversations are centred around holy days and celebrations, which tend to be happy occasions and less controversial.

## Education and Awareness

Many participating companies openly celebrate different religions and create awareness around key aspects. These activities tend to centre around festivals and holy days. Some send out newsletters around specific dates or months to create awareness of such holidays as Ramadan and fasting, encouraging fellow colleagues to accommodate and be mindful. Primark shares facts about religious holidays as part of its go-to-market strategy, generating healthy discussion among employees but also demonstrating an understanding and respect for its customers and the communities it serves. Others make a conscious effort to be inclusive all-around, from smaller gestures such as wishing someone a happy holiday, to creating themed menus and decorations in onsite cafeterias for special days.

“It is pleasing to see that there is a high base level of religious tolerance and that some businesses are going beyond. I particularly liked dentsu’s policy of enabling colleagues to select public holidays according to their personal faith. As we saw in 2021 with the highlighting of players breaking fasts during specially scheduled breaks in televised Premier League football matches during Ramadan, such initiatives are important because they normalise respect for individuals’ beliefs.”

**SANJAY BHANDARI**, CHAIR, KICK IT OUT

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## RELIGION OR BELIEF KEY FINDINGS

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Religious tolerance is generally high among the UK companies we surveyed, with most saying they strongly or somewhat agree that their workplace recognises the benefits of a wide range of religions (**90%**) and another 91% saying they strongly or somewhat agree employees can speak openly about their religion.

On the flip side, most strongly or somewhat disagree that their workplace is considered a secular place with religious discussions not allowed (**84%**), or that their employees have raised religious grievances which are difficult to resolve (59%).

**93%** of participating companies allow open discussions about religion and beliefs.

**94%** allow religious clothing or symbols in the workplace, and 90% allow specific time off for religious holidays and holy days.

**Two in three (69%)** provide a dedicated prayer space and cater to different dietary requirements (65%).

**Half (53%)** take specific steps to ensure managers are aware of their staff's religious needs.

Data on religion is collected less often as some other facets of diversity, with **just under half (46%)** saying they do not collect any of this data.

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## RELIGION OR BELIEF KEY RESULTS

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### 01

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To what extent, if at all, do you agree or disagree with the following statements?

**Our employees have raised religious or belief grievances that are difficult to solve**

Strongly Agree **2%**

Somewhat Agree **5%**

Somewhat Disagree **12%**

Strongly Disagree **47%**

**My business considers the workplace to be a secular space and discussion about beliefs are not allowed**

Strongly Agree **1%**

Somewhat Agree **4%**

Somewhat Disagree **11%**

Strongly Disagree **73%**

**My business recognises the benefits of a diverse workforce with a wide range of religions or beliefs**

Strongly Agree **63%**

Somewhat Agree **27%**

Somewhat Disagree **1%**

Strongly Disagree **2%**

Our employees are able to speak openly about their beliefs in the workplace

Strongly Agree **63%**

Somewhat Agree **28%**

Somewhat Disagree **7%**

Strongly Disagree **2%**

Source Q8B

N=85

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## 02

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**Does your business do any of the following?**

Allow employees to openly discuss their religion or belief in the workplace?

Yes **93%**

No **2%**

Don't know **5%**

Source Q8A(1)

N=85

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## 03

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**Does your business do any of the following?**

Permit employees to wear religious symbols and religious clothing in the workplace **Yes 94%**

Allow employees to take time off work for religious holidays and holy days **Yes 90%**

Provide a dedicated prayer room for employees with a religion or belief **Yes 69%**

Ensure that the dietary requirements of religion or belief groups are met at work **Yes 65%**

Source Q8A

N=85

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## 04

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**Does your business take steps to ensure that managers are aware of the religion and belief needs of its employees?**

Yes **53%**

No **36%**

Don't know **11%**

Source Q8A(2)

N=85

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## 05

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**Does your business collect and monitor employee data by religion or belief?**

Yes **49%**

No **46%**

Don't know **5%**

Source Q8A(7)

N=85

# RELIGION OR BELIEF RECOMMENDATIONS

“Alfa recognises the importance of individually held religious beliefs to persons within its workforce. Our supportive approach to religious diversity is detailed in our equal opportunity policies. We provide spaces for those who wish to carry out religious activities during the working day and flexibility for people to respect their religious practices. We celebrate various religious holidays internally via awareness blogs and events and use our corporate voice externally to raise awareness.”

**ANDREW DENTON**, CEO, ALFA

## 01

### **ENSURE YOUR DIVERSITY AND INCLUSION (D&I) POLICY HAS RELIGION AND BELIEF EMBEDDED:**

Your D&I policy should be a holistic and inclusive framework. It is vital to offer training to all employees and to discuss what is acceptable in terms of discussing faith in the workplace. Include more in-depth leadership training to support their teams in the most inclusive way. Ensure religious diversity is taken into account in recruitment, selection, promotion, training and development, reward and retention. Consider a dedicated D&I discussion with new recruits to ensure any occupational or religious requirements are addressed from day one.

## 02

### **CELEBRATE DIFFERENCES – BELIEF AND NON BELIEF:**

Celebrating the variety of cultures, customs and religious beliefs throughout the calendar year provides great opportunities for employees to come together, celebrate their colleagues and learn something new. Try marking holidays in internal communications messages, providing leadership support for employee-led religious celebrations and showcasing diverse employees and the work of ERGs. Where possible, ensure religious practices are encouraged by enabling colleagues to flex the working day to carve out prayer time or to schedule annual leave with respect to religious festivals and celebrations. Colleagues are also encouraged to embrace diverse religious beliefs, cultures and identities through self-education.

## 03

### **SAFE SPACES AND FAITH NETWORKS ARE IMPORTANT:**

In addition to dedicated spaces for prayer and other religious practices, organisations can establish Employee Resource Groups (ERGs) or Faith networks that bring together various communities, including religion. These ERGs not only provide mentoring, networking and informal pastoral support for other employees; they also provide employers with a valuable source of feedback for ways in which the organisation can boost its diversity and inclusion. Membership should be open to all and the networks provide a great opportunity to learn about and respect difference.

## **04**

### **BE OPEN AND TRANSPARENT ABOUT DIVERSITY AND INCLUSION:**

These measures sit within a broader need to showcase the company's values on D&I. A codified D&I policy that is easily accessible both externally and internally sends an important message, whilst creating a virtual training programme to ensure all employees understand the policy further reinforces the importance of D&I to the organisation. Lastly, ensuring there is a clear and simple process for reporting any instances of bullying, harassment or discrimination provides the reassurance for employees that they have a voice and that their voice will be heard.

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# CASE STUDY

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# DENTSU UK

## Celebrate who we are

At dentsu we are committed to create a culture where all our people can thrive, and the ultimate goal with our new **flexible public bank holiday policy is to make it possible for everyone to celebrate who they really are.**

At dentsu we want to encourage an inclusive workplace and with that also support everyone in serving their religion, personal choices, and lifestyle. We believe providing a flexible public bank holiday entitlement will further support this. It is a powerful step towards building a culture of inclusion that puts equal value in and celebrates everyone's culture, heritage and traditions. The idea for this choice was put forward by **REPRESENT**, our network for employees from ethnically diverse backgrounds and those who champion diversity and inclusion across our organisation.

In the UK we have employees from different nationalities and backgrounds, and we recognise not everyone's beliefs are aligned with some of the bank holidays in the UK calendar. Specifically, the four days centred around the Christian calendar (Good Friday, Easter Monday, Christmas Day, and Boxing Day) as well as New Year Day. Our new approach will provide everyone in the UK with the choice to work on these five bank holidays, and then take an alternative day off in the calendar year instead – one that better fits with their values and beliefs, whether this is to observe a religious or cultural celebration or one that is of personal significance to them.

In addition to the outlined benefits, we hope that this also removes any sense of discomfort employees may currently have in asking for time off for religious holidays or important traditions.

# NATIONALITY

**In fourth place, nationality benefits from most participating companies agreeing they promote the benefits of a culturally diverse workplace.**

## Celebrating Differences

Through our qualitative interviews, it is clear that participating companies value the differing perspectives other cultures bring, spurring innovation and creativity. Four in five say their company actively promotes a culturally diverse workforce, often through regular education campaigns, lunch and learns or sharing culturally appropriate dishes. Participants with global reach also cite the critical need for strong cultural and community understanding of the local markets they operate in. Being locally relevant by matching the workforce to the local population unlocks that market's potential.

## Training and Support

But the companies we surveyed know food alone can't bridge cultural gaps. Most include cultural-sensitivity modules within the wider diversity, equity and inclusion (DEI) training they mandate. Some say this includes differences in how other cultures communicate to mitigate misunderstandings and targets negative cultural stereotypes. Support for non-citizens also comes in the form of language training to boost the confidence of those who may be less comfortable speaking English, and ensuring line managers are monitoring active participation in team discussions, allowing all voices to be heard.

## Understanding Nationality Makeup

Many participating companies currently collect the nationality of their employees, however, it is unclear to what degree this data is used. One in three say they do not know what percentage of their workforce are non-UK citizens. When the data is leveraged, it often highlights that lower paid roles over-index in non-UK citizens. Exacerbating this, our survey found sponsorship of non-UK citizens is rare for participating companies, suggesting that there is a wealth of overlooked talent in the market. Suzie Welch from ODEON encourages businesses to understand the cultures within their organisation and use it to drive overall success of the business. This includes creating sponsorship schemes or, in global businesses, cross-country collaboration and leadership.

*"As a European business, we have many different nationalities working for us. Over the last few years we have dedicated more time to collaboration and working across countries to bring together different ways of thinking. We have put in place workshops to support leaders who lead different cultures and to maximise the ways of thinking and approaching their work to enable productivity."*

**SUZIE WELCH**, CHIEF PEOPLE OFFICER, ODEON CINEMAS GROUP

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## NATIONALITY KEY FINDINGS

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**Three in four (73%)** companies say they collect data on what countries their employees come from.

**Three in ten (31%)** say 10% or less of their workforce is from abroad.

**Most** participating UK companies promote the benefits of a culturally diverse workforce (**82%**) and **seven in ten** (69%) offer inclusivity training on how to work in a culturally diverse workplace.

**72%** of participating companies feel they take steps to ensure hiring practices are fair for non-UK applicants, with **three in five** (60%) offering visas and sponsorships.

**39%** offer support or guidance to non-UK workers for any challenges or discrimination they may face.

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## NATIONALITY KEY RESULTS

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### 01

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Does your business collect data on the nationality (i.e. country of origin) of employees?

Yes **73%**

No **20%**

Don't know **6%**

Source Q7A  
N=85

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### 02

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Approximately what percentage of your workforce is from outside the UK? Please give your best estimate

30%+ **11%**

11-30% **25%**

10% or less **31%**

Don't know **33%**

Source Q7A(1)  
N=85

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### 03

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Does your business:

Promote and communicate the benefits of a culturally diverse workforce? **Yes 82%**

Offer inclusivity training to line managers and staff to help them work in culturally diverse team? **Yes 69%**

Source Q7B  
N=85

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## 04

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### Does your business:

Ensure that recruitment processes are accessible and fair to non-native applicants? **Yes 72%**

Offer support and sponsorship to staff trying to attain a visa? **Yes 60%**

Source Q7B

N=85

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## 05

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Does your business offer support and guidance to non-UK workers for any challenges or discrimination they may face whilst integrating into teams?

Yes **39%**

No **47%**

Don't know **14%**

Source Q7B

N=85

# NATIONALITY RECOMMENDATIONS

“Cultural diversity and nationality is recognised and established as a key facet of diversity driving breadth of background, experiences and beliefs. What the survey tells us is that there is much more progress to make in terms of mutual understanding and respect to enhance the inclusion of this talent

to maximise and drive effectiveness of this talent. This would ensure this talent is developed, sponsored and both the workplace and culture is more effective for it to thrive.”

**DEAN CURTIS**, GROUP MANAGING DIRECTOR – RISK AND BUSINESS ANALYTICS, RELX

## 01

### **CELEBRATE YOUR ORGANISATION’S BREADTH OF CULTURE AND DIFFERENCES:**

The best way to show your colleagues that you respect and appreciate them is by being open to the traditions and values of all cultures. This means avoiding promoting or embracing only one culture in the workplace. Every culture has its own feelings about work, authority, time and what each person’s relationship to the employer or organisation should be. Failing to understand or respect how these cultural priorities, such as time to pray or time with family, affect a team member’s lifestyle can lead to an ineffective team.

## 02

### **USE DATA TO UNDERSTAND YOUR WORKFORCE:**

Invest time in learning what different nationalities are represented in your organisation across all levels. Use this insight to understand if you have areas that are a singular nationality and where there is more of a mix. Use these insights to form an inclusion action plan that recognises and respects the makeup of the workforce.

## 03

### **CONSIDER CULTURAL TRAINING:**

Spend time opening minds and changing mindsets by educating your workforce about the different cultures of their colleagues. Think about more formal cultural training, dependent on your workforce make up, to immerse the teams in the values and norms of the different cultures they will interact with.

## 04

### **BE RESPECTFUL OF LANGUAGE BARRIERS:**

A common challenge when working with different nationalities is language barriers between employees, especially if they have different mother tongues or strong accents. Remember to give those speaking a different language the time and space required to communicate effectively. Encourage people to get to know their colleagues beyond the surface assumptions by learning about their personal as well as work lives.

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# CASE STUDY

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# ROYAL MAIL

## One Royal Mail

### Our difference makes us great

As part of Black History month celebrations in 2021, Royal Mail rebranded its BAME employee network group to EmbRace after an open vote among all colleagues.

The main purpose of the rebrand and relaunch, of the EmbRace network, was to move away from the outdated 'BAME' terminology, make employees aware of the network's existence and objectives and give everyone an opportunity to join in.

With a diverse employee base of around 140,000 people across 3,000 locations, it was clear to EmbRace network members that their brand should explicitly welcome everyone and be reflective, not just of racial and ethnicity differences, but also of the vast array of differences within Royal Mail's employee base and in the communities it serves.

The EmbRace network focuses on four main areas of work:

- Communication – building awareness and engagement
- Training and Development – enabling career development and progression
- HR and Recruitment – ensuring equality and fairness in recruitment and retention
- Wellbeing – supporting employees to manage their physical and mental wellbeing

Black History Month 2021 was officially launched by Simon Thompson, CEO and many of the activities drew participation and support from hundreds of Royal Mail colleagues. With a focus on showcasing the outstanding contributions and talents of colleagues of all nationalities, the BHM campaign created a positive 'buzz' across Royal Mail.

The work of the EmbRace network is set to go from strength to strength, supporting Royal Mail to redouble their focus on Diversity, Equality and Inclusion. With the passion, energy and dedication of the network and its allies, there are exciting times ahead as the EmbRace network push to normalise 'inclusion' and inspire colleagues at all levels to play a part and get involved to build a business where everyone can be themselves and strive to achieve their full potential.

**Sasha Monique-Henry Crawford** (EmbRace network)

# SOCIO-ECONOMIC STATUS

**Ranking in the bottom half at eighth place, socio-economic status is slowly gaining ground, particularly in participating companies with traditionally white-collar roles.**

## Gaining Ground Slowly

While socio-economic status is not top of mind for many of the companies we surveyed, it is gaining traction, particularly in more traditional white-collar professions. Participating companies in industries with lower representation of those from lower socio-economic backgrounds say they are beginning to understand that including and nurturing this talent amplifies all voices, drives innovation, and accurately represents the community they or their clients often wish to target.

Some participating companies with a higher proportion of those from a lower socio-economic background are focusing on social mobility. In early 2021, Co-op launched the Co-op Levy Share program, where organisations who do not use all of their allocated apprenticeship levy can transfer up to 25% into a central pot instead of it being returned to HMRC. The donated funds can then be used by non-levy-paying organisations to pay for apprenticeship training and assessment costs, allowing more apprentice positions to be created, benefiting the wider community.

## Targeted Recruitment

Three in five of the companies we surveyed said they have specific outreach programmes to recruit talent from lower performing schools or socio-economic backgrounds. Often these programmes are run in partnership with universities and other organisations. KPMG in the UK, for example, has been focused on social mobility since 2006 as an active partner of the Real Living Wage movement and one of the first businesses to be an accredited Living Wage employer in 2011. Internally, the company has been collecting data on the socio-economic background of its workforce since 2016 and working with a wide range of schools, universities and organisations to target talent from historically underrepresented groups. Mark Russell, a Manager in the Inclusion, Diversity and Equity team from KPMG in the UK, says these kinds of outreach programmes are critical as they “help to level the playing field to provide a pathway to those students.”

## Hard to Measure

Gathering the data on socio-economic status is tricky. The companies we interviewed cite hesitancy of the workforce to disclose such information, as employees feel they may be disadvantaged further or discriminated against, or even feel they are being disloyal to their family. When the data is collected, participating companies say they are able to set targets, monitor progress and make adjustments along the way. The key to increasing voluntary disclosure is to establish trust through open communication on why the data is important, how it will be used, and what benefits it will bring to employees.

“Socio-economic background relies on data, but there is confusion about what is required to make informed decisions. The government and the Social Mobility Foundation both provided questions with a lot of companies relying on the question about the occupation of the main household earner when individuals were aged 14. This gives a static picture which may be helpful but individual circumstances change so this may no longer be relevant. So, what are companies going to do with the data when they have it and what is the impetus for collecting it in the first place?”

**DENISE KEATING**, CEO, UMBRELLA HR

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## **SOCIO-ECONOMIC STATUS KEY FINDINGS**

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**86%** of companies say they do not require undergraduate education for trainee positions.

**Very few (12%)** look at college/university backgrounds of leadership candidates or promotions.

Only **25%** collect and monitor data on the socio-economic background of their workforce, making it difficult to understand the size of the issue.

**63%** of participating companies say they have specific outreach programmes to target candidates from lower performing schools or socio-economic backgrounds.

**33%** say they are using contextual recruitment practices to support these applicants, with only **6%** using the REAL rating contextualisation tool.

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## **SOCIO-ECONOMIC STATUS KEY RESULTS**

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### **01**

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**Does your business require applicants for trainee positions to be educated to at least undergraduate level?**

Yes **8%**

No **86%**

Don't know **6%**

Source Q4A(5)  
N=85

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### **02**

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**Does your business take into consideration the college / university background of employees you recruit / promote to your leadership team?**

Yes **12%**

No **76%**

Don't know **12%**

Source Q4A(6)  
N=85

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## 03

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Does your business collect and monitor data on socio-economic background (e.g. parental qualifications, types of school attended, eligibility for free school meals)?

Yes **25%**

No **69%**

Don't know **6%**

Source Q4A(2)  
N=85

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## 04

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Does your business actively promote internships and entry-level positions to young people from lower socio-economic backgrounds? **Yes 63%**

Does your business use contextual recruitment practices to support applicants from underperforming schools and less advantaged backgrounds? **Yes 33%**

Does your business use the Relative Education Attainment Level (REAL) contextual recruitment tool? **Yes 6%**

Source Q4A  
N=85

# SOCIO-ECONOMIC STATUS RECOMMENDATIONS

“I continue to be a great supporter of apprenticeships as a way into the workplace for those from all socio-economic backgrounds.”

**ANDREW ALLNER**, CHAIRMAN, SIG GROUP PLC

## 01

### **LEADERSHIP ADVOCACY:**

Asking a senior leader to speak out or share a personal story relating to privilege or their specific upbringing can inspire others and help break down barriers associated with socio-economic factors. This can break down taboos that come with people who have had different upbringings. Work to change negative stereotypes people may have relating to social and economic factors, such as income, education, employment, community or housing. Having leaders respect and embrace different economic backgrounds can allow others to feel safe to share their own stories and experiences and feel proud of their background, regardless of where they have come from.

## 02

### **COLLABORATE WITH LOCAL AND GLOBAL COMMUNITIES TO RAISE SKILLS AND ASPIRATIONS:**

Work with your local or global communities where there are more commonly lower socio-economic backgrounds. Find training and solutions that can support these communities to raise skills, support recruitment and talent through this work. Programmes can include apprenticeships, educational support systems such as talks in local schools or educational establishments to support skill growth and show the opportunity.

## 03

### **INTRODUCE APPRENTICESHIP PROGRAMMES:**

Apprenticeships are a tried and tested way that employers can drive socio-economic diversity within their organisation. Apprenticeships provide a unique solution to help attract people from a wider talent pool. Creating an apprenticeship programme shows a commitment to developing a fair, diverse and inclusive workplace in which people feel welcome and can just be their true selves.

## 04

### **DEVELOP ROBUST EVIDENCE AND PRACTICAL ACTION:**

Understand your socio-economic data. Collecting the data will provide the evidence required to take action and remove any potential barriers facing those from lower socio-economic backgrounds.

#### **That action could include:**

- new recruitment programmes focused on 'inclusive hiring techniques' dedicated to bringing in talent from lower socio-economic backgrounds at middle management and senior levels, such as blind screening / removal of educational background
- development of reverse mentoring programmes that can break down misconceptions and be mutually beneficial on the exchange of skills and experience
- the introduction of mandatory socio-economic mobility training focused on raising awareness on socio-economic exclusion
- performance development programmes inclusive of colleagues from lower socio-economic backgrounds

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# CASE STUDY

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## KPMG

### Driving social mobility

At KPMG, we're committed to creating an inclusive environment where all colleagues thrive and reach their full potential, whatever their identity or background. This is fundamental to our success as a business.

As a firm, we've been committed to improving social mobility for over a decade. This includes working with our local communities to raise skills and aspirations, challenging our recruitment and promotion processes and being the first firm to publish comprehensive socio-economic background workforce data in 2016. This level of transparency has allowed us to understand the barriers that exist and to hold ourselves to account to change.

In 2021, we continued to challenge ourselves to go further by reporting our socio-economic background pay gaps for the first time. We're one of the first organisations to do so. We've worked with experts in the field of social equality, the Bridge Group, to advise us on the chosen method of calculation (parental occupation groups), explain the reasoning for this, the definition of socio-economic background and the terminology used. We know pay gaps are just one part of the picture. What's important is what we do with that data. That's why we're also publishing a social mobility action plan to set out how we're addressing our pay gaps.

We've also set an ambitious target that aims to see 29% of our partners and directors from a low socio-economic background by 2030. We are proud to have been ranked second in the Social Mobility Employer Index in 2021, continuing our history of being ranked in the top three since the index was first introduced in 2017.

"Social mobility is all about creating a fairer, more equitable society. And that work starts within our own firm. We've been committed to improving social mobility for over a decade and are extremely proud to be leading in this space.

The past year alone has seen the roll out of our Employability Award, the launch of our now thriving national social mobility network and the publication of our socio-economic background pay gaps for the first time, including ambitious new targets as part of our new social mobility action plan."

#### **KPMG SOCIAL MOBILITY NETWORK CHAIRS**

# KPMG: EMPLOYABILITY AWARD

Research shows that where you come from and what your parents do has an impact on work experience opportunities and career aspirations. And the COVID-19 pandemic impacted this further, with students from lower socio-economic backgrounds more likely to face challenges such as lack of technology at home or limited access to quality career advice.

In 2021, we launched our Employability Award, aimed at giving university students the opportunity to increase their employability skills and build confidence. The programme was also designed to be a gateway to applying to KPMG – empowering participants to apply to our graduate or formal work experience programmes.

Over 500 students applied, with 96 students chosen to attend the sessions, which covered topics such as resilience and commercial awareness, as well as providing support with applications and mock interviews. Each student was also given a dedicated contact within the Student Recruitment Team to keep in touch with.

Since the programme ended, 33% of participants have made an application to KPMG's graduate or work experience programmes. And given that 92% of participants were first- or second-year students, we hope to see even further applications in the coming years.

“Social equality is the defining challenge for the UK. The link between socio-economic background and adult outcomes is stronger here than in any developed country; and this has consequences for everyone. It is estimated to cost the UK £39 billion per year and research by The Bridge Group (2020) showed that within financial services, employees from lower socio-economic backgrounds took 25% longer to progress through grades.

At KPMG, this has been an area of focus for over a decade, and we continue to challenge ourselves. Most recently we published our socio-economic pay gaps for the first time and aim to have 29% of our Partners and Directors from a lower socio-economic background by 2030. We still have a long way to go, but we are working with policy makers, clients and within our communities to accelerate that change.”

**SENDA KAVINDELE**, INTERIM HEAD OF INCLUSION, DIVERSITY AND EQUITY, KPMG UK

“In the UK this year we once again saw a further widening of GCSE results. Fewer than 14% of grades for students on free school meals were Level 7 (A) or above compared with over 31% for pupils who are not eligible for the benefit. In our world today, so much talent, potential and innovation is lost at an early age based on the circumstances of how life started for them. It is encouraging to see that whilst challenges remain in measuring socio-economic status in the workplace, business is doing more to support the realisation of this talent and becoming more innovative in its acquisition.”

**DEAN CURTIS**, GROUP MANAGING DIRECTOR – RISK AND BUSINESS ANALYTICS, RELX

“Positively surprised at the openness of UK companies to non-degree holding job candidates but disappointed to see that just 18% of surveyed employees have a focus on socio-economic status as a component of their leadership diversity strategies, reflected also in a total lack of data collection or monitoring of socio-economic data (21% of surveyed employees). Despite these findings, 61% of surveyed employees claim to actively promote internships for people from lower socio-economic backgrounds. However, there is clearly an intention-behaviour gap present because just half of these employees actually use contextual recruitment practices.”

**JALI PACKER**, RESEARCH FELLOW, MCKINSEY GLOBAL INSTITUTE

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# CASE STUDY

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## CO-OP

### **At Co-op we know that socio-economic status is a hidden facet of diversity and inclusion**

As our workforce includes a large percentage of frontline workers who are often from a lower socio-economic background, ensuring opportunities for social mobility is critical to us. We believe that talent is everywhere but opportunity is not and we have signalled our commitment to this through the creation of a new role in our organisation: Social Mobility Lead.

To create an internal social mobility strategy and identify priorities of focus, we started with the data. To determine the socio-economic background of colleagues, the Social Mobility Commission recommends asking what the occupation of the main earner in your household was when you were 14. This question zeros in on the formative years of employees and removes the stigma of terms such as “underprivileged.” We embedded this into our annual engagement survey for 2021 as a way of testing colleague engagement with the questions ahead of making changes to our online HR data.

Ahead of receiving the full results from the survey, we wanted to take a snapshot of our leaders. A recently-completed pilot survey with our 150 most senior leaders across the company is shining a light on the socio-economic background of this population for the first time. By combining this data with their length of service at Co-op, we can start to understand if rising up through the ranks is as easy as starting at Co-op, regardless of background. The data will allow us to see the scale of the issue and help us identify the biggest blockers to progression for colleagues.

It is important to note that while we are focusing on social mobility, we are not prescribing what success looks like for our employees - whatever the background, our people should be able to progress in the way they would like to. Our strategy aims to serve everyone from all communities, not just a few chosen people who have been identified as future leaders.

While we build out our plans we have uncovered some immediate opportunities. One is to overcome concerns employees may have around disclosing this information, which we are doing by explaining that the data is being used to look at equity, not equality. Another is to support our employees with lower levels of English skills (sometimes as a result of it being a second language) with training, boosting their capability and confidence. In addition, we encourage more work on social mobility externally with our suppliers and wider business through our external campaigning work.

None of this would be possible without data. For any company looking to start their journey on socio-economic status, we believe that data is fundamental to understanding. We highly recommend following existing frameworks and advice, such as those from the Social Mobility Commission, as they are grounded in the research and best practice needed to move forward.



# MENTAL HEALTH

**Mental health sits at the top of the 2021 rankings. As the awareness of mental health has expanded significantly over the last two years, participating companies say they are supporting their employees with mental health care access and training.**

## Affects All

Mental health has been a big topic for our participating companies, with four in five saying they have a mental health strategy. With the increase of depression and anxiety due to the stresses of the ongoing pandemic, most of these strategies include both preventative measures and proactive support for those immediately impacted. The companies we interviewed understand that there must be a foundation of positive mental health that is continuously nurtured as it fluctuates. As Dr. Jenn Gandhi from The FA states: “Wellbeing is the foundation of high performance.” Some participating companies make sure that people at all levels of the organisation, including senior leaders, are open about their own mental health.

## Support Systems

The types of support systems vary. Many of the companies we interviewed publish regular newsletters encouraging activities that drive positive mental health. Some have mental health first aiders, a group of employees trained on mental health support. Others go the extra step of training line managers as part of wider wellbeing programmes so they can have the right conversations with employees and take care of their team. Havas, for example, has a comprehensive wellbeing strategy focused on preventative care. The company gives each employee four mental health days a year over and above any holiday allocation. It also manages hybrid working and helps prevent burnout by setting protocols to protect people’s time throughout the week, such as stipulating times when no internal meetings can be booked, and operating core office hours of 10 am to 4 pm, giving employees flexibility to design work around personal commitments, enhance productivity and promote positive wellbeing.

## Remote Working

Many studies have shown that, after the initial novelty wore off, remote working during the pandemic has increased employee stress and burnout, exasperating the mental health crisis we find ourselves in. What’s more, remote working means employees miss the daily informal interactions they used to have with colleagues, making it more difficult to check in or spot someone who could use help. To combat this, some of the companies we interviewed make sure managers have daily check-ins with remote employees, even if it is as simple as sending a “Hello” over chat. To Dr. Gandhi, it is all about making and nurturing the human connection. To really support colleagues and friends, we need to “build relationships and learn how to truly listen.”

“Wellbeing is the foundation of high performance.”

**DR. JENN GANDHI**, THE FA

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## MENTAL HEALTH KEY FINDINGS

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**84%** of participating companies say they have a mental health strategy.

**Almost all** participating UK companies are keen to support their employees with access to quality mental health care (93%) and by providing mental health training (88%).

Just over **three in five (64%)** take steps to eliminate discrimination in the workplace against employees with mental health vulnerabilities.

**Seven in ten (70%)** dive into their data to track and monitor absenteeism, leavism and presenteeism in order to understand that impact of mental health on the workforce and organisation.

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## MENTAL HEALTH KEY RESULTS

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### 01

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Does your business have a mental health strategy / plan for all employees which includes education, awareness and tackling stigma?

Yes **84%**

No **12%**

Don't know **4%**

Source Q9A(1)  
N=85

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### 02

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Does your business provide employees with access to quality mental health care, services and support?

Yes **93%**

Does your business provide mental health training? Yes **88%**

Source Q9A(1)  
N=85

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### 03

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Does your business take steps to eliminate discrimination against employees with mental health vulnerabilities or developmental disability in your workplace?

Yes **64%**

No **28%**

Don't know **8%**

Source Q9A(5)  
N=85

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## 04

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Does your business track and monitor absence, presenteeism, and leavism to understand the impact of mental health, wellbeing and mental illness on individuals and the organisation?

Yes **70%**

No **23%**

Don't know **7%**

Source Q9A(3)

N=85

# MENTAL HEALTH RECOMMENDATIONS

“As mental health becomes a more prominent issue, many leaders are having to rethink the employment relationship, specifically how they provide the appropriate support remotely and in a timely and meaningful way. Those organisations who embrace the need for a new welfare contract with colleagues and embed it into ‘the way work gets done’ will be the winners in the race for talent.”

**DEBBIE HEWITT**, REVIEW COMMITTEE MEMBER AND PLURAL NON-EXECUTIVE CHAIRMAN, VISA EUROPE, BGL GROUP, WHITE STUFF AND THE FA

## 01

### **LEADERSHIP VULNERABILITY AND SAFE SPACES:**

The pandemic has driven mental health needs to record levels irrelevant of role, level, and past history. Asking a senior leader to speak out or share a personal story relating to mental health can inspire others and help break down barriers. It also has the effect of allowing others to feel safe to share their own stories and experiences. With trends such as male suicide hitting a two decade high, it's even more important to create an open leadership culture where people feel they can share their worries, anxiety and stress.

## 02

### **COMPASSIONATE LEADERSHIP:**

Ensure all leaders are trained and have access to resources and confidential support for themselves and their teams. These should be visible and promoted internally and externally to reinforce the organisation's intentions when it comes to mental health. Internal or external workshops and webinars delivered by experienced and qualified mental health professionals can educate and engage staff. Sessions could range from how to manage anxiety, stress or depression to how to support others through bereavement.

## 03

### **MENTAL HEALTH AND WELLNESS TRAINING NEEDS TO CONTINUE TO SCALE:**

Invest the time and resources by upskilling mental health and wellness champions within the workforce. Mental health first aid is a good place to start as it teaches people how to identify, understand and support a person who may be starting to develop issues, thus potentially eliminating them later on down the line.

## 04

### **PROMOTING HEALTHY LIFESTYLE CHANGES ALONGSIDE MAKING MENTAL WELLNESS AN EMPLOYEE PRIORITY:**

This can be simple tactics that support their work/life balance or social interaction in our new virtual reality, as well as education tools and resources on mental wellness and healthy lifestyle options. Supporting well known initiatives such as World Mental Health Day is a great way to show interest in improving mental health and wellness at work. Campaigns such as these often allow further access to resources such as tools, marketing and banners to support your organisation's initiatives.

“Protecting and improving the health of our colleagues benefits our people and our organisation. Royal Mail is one of the UK’s largest employers, investing in the wellbeing of our people also delivers economic and social benefits to the communities we serve.

Throughout the pandemic, we have continued to share health and wellbeing campaigns, communications, guidance and signpost colleagues to support including to our employee assistance programme. This includes for physical and mental health; domestic abuse; suicide; bereavement; isolation; financial wellbeing and the impact of being a key worker.

We have provided equipment and have shared guidance on work stations and a range of guidance to ensure home based colleagues are looking after both their physical and mental health and feel connected to their colleagues.”

**ZAREENA BROWN**, CO-CHAIR OF THE MCKENZIE-DELIS FOUNDATION AND CHIEF PEOPLE OFFICER OF THE ROYAL MAIL

“Over the last two years, the awareness of mental health has expanded significantly.

There has been pressure on managers to be more aware and to support in ways that many have not been used previously. The need for mental health training has never been more important to support employees where needed.

Ensuring people at all levels, including leaders, can be open about their own mental health will continue to build confidence in people’s ability to acknowledge issues and get the right support whether that is short term or a longer term change to a way of working.”

**SUZIE WELCH**, TRUSTEE OF THE MCKENZIE-DELIS FOUNDATION AND GROUP CHIEF PEOPLE OFFICER AT ODEON CINEMAS GROUP

“Mental health certainly appears to be a growing issue. There is no doubt that the prolonged periods of uncertainty, sense of isolation from working from home, lack of face-to-face time, impersonal nature of virtual meetings, home space and child pressures, being always online, etc is taking a significant toll on mental health.

It is encouraging that many companies recognise this and mental health policies and programs are being put in place. A key issue is recognition so support can be provided at an early stage before the position becomes too acute. Further training and other actions are necessary in this area to improve awareness and knowledge of how to address potential concerns. Importantly, ensuring the right culture remains a key focus and responsibility of boards and is critical to protecting mental health.”

**ANDREW ALLNER**, CHAIRMAN, SIG GROUP PLC

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# CASE STUDY

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## THE FA

### **Progressive organisations understand that positive mental health is a key enabler to healthy culture and high performance.**

If we want to talk about high performance and resilience, positive mental health and wellbeing have got to be the foundation upon which these qualities emanate, recognising that mental health and wellbeing are on a continuum that fluctuates and needs daily investment.

The FA has always taken mental health seriously, but in mid-2020 the leadership team went a step further and created a brand-new role of a Mental Health and Wellbeing Manager responsible for leading a comprehensive, bespoke mental health strategy across the entire organisation encompassing not only the England national teams, but also employees at Wembley and St George's Park, the national and league football teams, and the grassroots communities.

The strategy's goal is to ensure that individuals have the opportunity to experience positive mental health and wellbeing irrespective of where they work, the types of stresses they experience or the current support they have in place. The strategy built this support around a pyramid.

The top 2-10% of the pyramid focuses on those who require immediate support, and The FA does that by ensuring everyone has access to professional support when they need it, be it through private medical insurance, occupational health programs, or employee assistance lines. The FA also partners with Sporting Chance to support not just players or on-the-pitch participants but also HR and Events teams. Through this offering, frontline employees, alongside those going through certain disciplinary investigations, can access services including 1:1 confidential support to help them with specific issues and receive advice.

The middle layer of the pyramid is about building on understanding of the stresses that employees are exposed to across their different roles and in different contexts at work. Here there is collaboration between the Mental Health and Wellbeing Manager and the Health and Safety Manager to understand how to effectively mitigate some of those stresses, noting which touch-points and triggers it might be critical to be aware of.

Finally, the bottom section of the pyramid focuses on preventative care, where The FA proactively supports people to look after their mental health through a combination of awareness programmes, education, training and development, and peer support. As part of this a programme is being launched to train and support 30 mental health ambassadors across Wembley and St George's Park. Their role is to raise awareness of mental health and wellbeing, signpost support for people who may be struggling, make sure that conversations between people are happening, and help to change the language around mental health more broadly.

It hasn't been easy, and the pandemic has only elevated the importance of mental health. The FA's senior leadership team has really stepped up and talked openly and honestly about mental health, prioritising wellbeing and creating safe spaces for people in various forums – this has placed the human at the heart and centre of everything that is done (#humanfirst).

The key will be for all employees across the organisation to keep building relationships and learn how to truly listen to each other within and across the ecosystem, recognising the different challenges people are facing every day. Everyone has a responsibility to approach every conversation with curiosity and build trust so that there is the continued development of a psychologically safe space.

Positive mental health is not an overnight thing or a tick-box exercise. It is an effort and requires energy every single day. However, the power of maintaining positive mental health should never be underestimated as there is huge power even in a single conversation.

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## CASE STUDY

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# BUPA

**Bupa is a global healthcare organisation serving more than 31 million customers and partners every day, committed to our purpose of helping people live longer, healthier, happier lives and making a better world.**

Our Diversity and Inclusion (D&I) strategy is underpinned by our values and is key to our desire to look after our people and provide an environment where all our people can thrive and feel they belong. At Bupa we're taking a holistic approach to D&I through acknowledging and celebrating the fact that we are all individual and difference makes us stronger. Bringing our collective experiences together to be more innovative, generating ideas to solve the complex problems of a diverse and fast-changing world, better, faster, together.

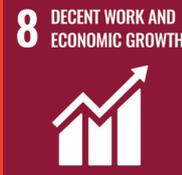
To deliver on our strategy we need to bring out the best in our people. If we take care of ourselves, we can take care of others - that's why wellbeing at Bupa is so important, in the context of inclusion, this means we strive for an environment where people feel psychologically and physically safe.

Our Group CEO Iñaki Ereño is signatory of the Global Business Collaboration for Mental Health pledge. The pledge is a clear commitment to continuing to reduce the stigma around mental health in society.

Through 2021 across all our businesses globally we continued to support colleagues with their mental and physical health through the pandemic, as well as navigate what "Hybrid" working has meant for office-based roles in Bupa. We also focus on providing support to our people's wellbeing with an evidence-based tool called Personal Energy which enables people to take purposeful steps to manage energy and wellbeing, providing self-awareness, self-care, guidance and support to taking positive actions.

As a global healthcare organisation, we are fortunate to have incredible expertise across all aspects of wellbeing, clinical, and health and safety. We ensure we maximise this for our people with a particular focus on doing this sustainably, alongside how we protect the planet as we improve human health.

DIVERSITY AND INCLUSION  
ARE AT THE HEART OF THE  
**UNITED NATIONS SUSTAINABLE  
DEVELOPMENT GOALS (SDGs)**



10

# PARENTHOOD

**In third place, parenthood ranks highly with many participating companies saying they support working parents with flexible benefits and wage uplifts for parental leave.**

## Flexible Work Benefits

The pandemic and home working has put a spotlight on working parents and other carers. It has increased the need for employees to pivot from professional to personal more frequently, and companies who we surveyed have largely responded by allowing flexible working. “We spend a lot of time talking about family across our cinemas and in our support offices. We want people to have flexibility to work in a way that works for them. Whether that is enabling them to watch their child in a school play, for example or changing shifts with someone to do something important to them.” Suzie Welch, ODEON Cinemas Group.

## Dedicated Support

About half of the companies we surveyed have dedicated parental support beyond the flexible work that is now standard. This often comes in the form of parent training workshops, and ensuring line managers are equipped to support. One of the companies we interviewed launched a series of workshops, spanning from when the employee first discloses they are expecting (are pregnant, partner is pregnant or adopting), through to returning to work, often including their line manager. In fact, this company has made a concerted effort to set guidelines and train line managers on how to support expectant parents and their transition, ensuring all employees have the same experience.

## Parental Policies

Only half of the companies we surveyed publicly state their offering for parental leave. Those who do have told us qualitatively it enables them to attract the best talent. Most of the companies we surveyed offer an increase in statutory maternity pay, with slightly fewer saying the same of paternal or adoption pay. This discrepancy in who qualifies for an uplift in pay highlights the need for parental policies to be reviewed, as many are outdated and focused primarily on expecting mothers, with some consideration to expecting fathers. Understanding that family makeup is more dynamic is now essential. One company we interviewed recently updated its parental leave policy to include anyone growing their family, including expecting partners of any gender or sexual orientation, and adoptive parents.

“We spend a lot of time talking about family across our cinemas and in our support offices. We want people to have flexibility to work in a way that works for them. Whether that is enabling them to watch their child in a school play, for example or changing shifts with someone to do something important to them.”

**SUZIE WELCH**, TRUSTEE OF THE MCKENZIE-DELIS FOUNDATION AND GROUP CHIEF PEOPLE OFFICER AT ODEON CINEMAS GROUP

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## PARENTHOOD KEY FINDINGS

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**52%** of participating UK companies say they publicly state their offering for parental leave.

**Almost four in five (78%)** offer some form of an uplift on statutory maternity pay, with **three in five** doing the same for paternity and adoption (63% and 61%, respectively).

**About half (55%)** train line managers on how to support returning parents or those who are expecting, and slightly fewer provide formal support for returning staff in the form of workshops, mentoring or otherwise (49%).

Flexible working is **embraced by nearly all (94%)** organisations we surveyed.

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## PARENTHOOD KEY RESULTS

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### 01

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#### Does your business:

Externally publicise your offer to parents around maternity, adoption, shared parental and paternity leave?

**Yes 52%**

Offer maternity pay? **Yes 78%**

Offer paternity pay? **Yes 63%**

Offer adoption pay? **Yes 61%**

Source Q10A

N=85

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### 02

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#### Does your business:

Provide formal support for someone returning from parental leave (for example, coaching, returner workshops, mentoring)? **Yes 49%**

Train and equip line managers to be able to support team members who are expecting a child or returning from parental leave? **Yes 55%**

Source Q10A

N=85

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### 03

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#### Does your business:

Offer flexible working to parents returning from leave? **Yes 94%**

Source Q10A(6)

N=85

# PARENTHOOD RECOMMENDATIONS

“Whilst some organisations and industries are already extremely “family-friendly” and therefore might not need formal support, if trends seem to be in existence that highlight retention challenges for those with parent/caring responsibilities this is a proactive intervention that organisations can make for individuals, managers and wider teams.”

**EDLEEN JOHN**, INTERNATIONAL RELATIONS, CORPORATE AFFAIRS AND CO-PARTNER FOR EQUALITY, DIVERSITY AND INCLUSION DIRECTOR, THE FA GROUP

## 01

### **ROLE MODEL BEHAVIOUR FROM THE TOP:**

Ensure leaders are ‘work-life-friendly’ role models for employees. If managers in your company are responding to emails while on holiday, it sends a message to employees that they are expected to do so as well. Be sure to respect the balance and privacy of your employees and avoid contacting them after normal work hours. With the impacts of COVID-19 hitting parents hard where work, schooling and parental care clashed into one location it’s never been more important to address work life balance and the impacts virtual working can have to ever extend the working day.

## 02

### **IMPROVE AND EXTEND PARENTAL LEAVE PROGRAMS:**

These programs should represent parental, caring, fertility and baby loss needs of your workforce. Review and enhance your parental leave and pay offer, including paternity leave and shared parental leave (SPL), to give parents choice. Your parental leave policies should also be extended to capture caring responsibilities and leave options for fertility and baby loss issues – leading practice should extend to the father as much as the mother – the trauma of baby loss is as traumatic for both. Provide clear and easy to understand information on your parental policies and the support available, on your internal and external websites. Encourage fathers to take paternity leave and SPL, and support them to take their full entitlement of leave.

## 03

### **COMMIT TO FLEXIBILITY:**

One of the positives from the pandemic is that it has proved virtual working can deliver although it can never replace human face-to-face interaction. The old school view of five days a week in the office is no longer best practice or necessary, especially with the parents or carers in your organisation. The best way to help parents and carers at your workplace is allowing them to work a flexible schedule. Add flexible working to job adverts so people know that it will be considered or is part of the role. Flexibility could include flexible work from home days, work hours outside the typical nine-to-five, and opportunities for remote work.

## 04

### CREATE A TRANSPARENT AND EMPATHETIC CULTURE FOR BOTH PARENTS AND CHILDFREE EMPLOYEES:

Knowing you have permission to work flexible hours and actually feeling like you can do it is another issue entirely. Clarifying to your whole company how employees can use benefits will help everyone feel more comfortable and appreciate having them in place, including employees without children who plan to raise them in the future or maybe supporting extended family with childcare responsibilities. Also recognising some employees are childfree out of personal choice or fertility issues is critical so being open and transparent is as important to drive inclusion for parents as well as childfree employees.

“Whilst the continued focus on gender diversity is encouraging (albeit more progress needs to be made!) I believe a key enabler to making progress is more focus and support for parenthood. Only half of companies confirmed support for new parents.

Training and return to work support is critical to help new parents continue to progress their careers and in doing so this will surely support business’s gender diversity ambitions.”

**KARI DANIELS**, CEO, TESCO IRELAND

“For many individuals in the workforce, choosing to become a parent is one of the most important life-decisions that can be made and for organisations to continue to recruit, retain and develop top talent supporting and respecting this aspect of someone’s life is vital.

Being a parent or carer isn’t something employees can “park at the door” and therefore organisations understanding this and supporting individuals and their teams to adjust before, during and after caring responsibilities helps to create a more inclusive organisational environment.

Whilst the employment landscape on flexibility has changed due to the COVID-19 pandemic, it is positive to understand that the significant majority of organisations now embrace flexible working and highlights that this is then embedded and part and parcel of the culture. This in itself can help to create a more inclusive environment by not singling out work flexibility as something that only parents/carers are entitled to and thus minimising any negative stigma associated with increased flexibility.

It is positive to see that most organisations offer uplifts on maternity, paternity and adoption pay and as society develops, I hope this becomes the established norm across the board if organisations are truly to support employees throughout transitional life stages.”

**EDLEEN JOHN**, INTERNATIONAL RELATIONS, CORPORATE AFFAIRS AND CO-PARTNER FOR EQUALITY, DIVERSITY AND INCLUSION DIRECTOR, THE FA GROUP

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# CASE STUDY

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# ALFA FINANCIAL

**Alfa has 350+ staff around the world, providing leading asset finance software.**

During the first lockdown of 2020, Alfa colleagues grouped together to form the Parents' Community – a place to support, share experiences and pass on tips. To help team members further during such a challenging time, Alfa made enhancements to Parental Leave policies.

Flexible working was the order of the day for everyone from that time onwards, but we went one step further in 2021 and introduced smart working across the organisation. We know employees have commitments and lives outside work, which is why everyone can now choose, as part of their team, where they're based on work days. Be it in the office or at home, we keep everyone connected and make sure we're all pulling together.

During school holidays and periods of home-schooling we have laid on activities for families, including a virtual tour of Jimmy's Farm, where the Head Keeper introduced us all to the animals. We've also hosted 'Bake Along' online events for creating cakes with the kids.

Whilst we have responded to events around us, our efforts are not always reactive. Flexibility is an ethos that has underpinned the Alfa culture forever and we're proud that our/many individuals take up SPL.

We're always listening to what our people need, and will always do what we can to be inclusive, diverse and family friendly.

"Shared parental leave has been a fantastic opportunity to split the parenting equally within our family. From an early age our child has known us both to be primary care givers. The availability of shared parental leave has started to shift and balance the perceptions of male and female employees in the company. Alfa is showing all employees that being a parent can help you develop in your job and not have an impact on your career."

**GREG DUNNING**, FINANCIAL TECHNOLOGY PROJECT MANAGER, ALFA

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# DIFFERENCES BETWEEN THE UK AND US:

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Given the small samples sizes in both markets it is difficult to provide specific statistics between the UK and US, but there are some differing trends worth mentioning. With the exception of some aspects of mental health or religion, the US companies we surveyed outperform or perform similarly to their UK counterparts. Participating US companies outperform those in the UK on ethnicity, sexual orientation, nationality and parenthood.

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## RACE AND ETHNICITY

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The US companies we surveyed have made more progress than those in the UK with regards to race and ethnicity. This facet ranks first in the US, while it is seventh in the UK, which is largely driven by **nine in ten** participating US companies saying they have at least one member of an ethnic minority background on their leadership team, compared to **two in five** of UK companies who say the same. Similarly, **almost all** US companies say they have at least one member on their Board of Directors, while **three in ten** UK companies say their Boards are 100% White.

Participating US companies are also **twice as likely** to say they monitor the pay and progression of ethnic minority employees, and **almost twice as likely** to say they have specific outreach programs to recruit talent from ethnic minority communities.

And participating US companies are **more likely** than those in the UK to measure progress and support employees with executive sponsorships of ERGs.

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## SEXUAL ORIENTATION

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On sexual orientation, the US companies surveyed are **twice as likely** than those in the UK to say they have at least one member who self-identifies as LGBTQ+ on their leadership team, and **almost twice as many** say they have approved an LGBTQ+ strategy in the last 12 months.

US companies interviewed are also **more likely** to say they share stories of senior leadership with employees and provide executive support to ERGs.

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## NATIONALITY

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**Almost all** US companies say they promote the benefits of a diverse culture, with **three in four** UK companies saying the same. And non-US employees are more likely to receive support for any discrimination they may face, than non-UK employees in that country.

However, tracking the nationality of employees is **more likely in the UK than the US**.

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## PARENTHOOD

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Financial support for new parents is **more common** in the US than it is in the UK, and is more often publicised as an employee benefit in the US.

**Almost all US** companies surveyed say they provide maternity pay, compared to **three in four UK** companies who say the same. Paternity pay is also more common in the US than the UK.

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## RELIGION

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UK companies we surveyed **fare better** than their US counterpart when it comes to religion, with **almost all** saying they allow and encourage open discussion on religion or belief, compared to **three in four** US companies.

**Half** of UK companies participating track data on religion, while this is not tracked by the US companies surveyed.

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## MENTAL HEALTH

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**A similar number** of employers surveyed across the US and UK say they have a mental health strategy and provide mental health support.

UK companies, however, are **more likely** to say they provide mental health training than their US counterparts.

UK companies are also **twice as likely** to say they track absenteeism than those in the US.

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# INTERSECTIONALITY AND THE SHIFT TOWARDS HOLISTIC DIVERSITY:

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**A holistic view of diversity goes beyond gender and ethnicity and looks at these factors as well as sexual orientation and disability (visible and invisible), age, generation, parenthood and caring responsibilities, mental health and wellness, socio-economic status and religion or beliefs. Each of these facets represent populations that also face discrimination and barriers in their lives.**

The problem is that most companies often don't take a holistic view of their employees. A human being's identity is made up of different, intersecting aspects. An employee might be a 42-year-old, Black, transgender woman with two school-age children. Each of those factors is important in understanding the complete flesh-and-blood person and how those intersecting identities relate to the organisation and wider society.

And not only are employees made up of these different facets of diversity – so are organisations' customers, suppliers, and investors. Yet it seems hardly anyone is taking the time to understand and develop a workplace where all can thrive.

We are wired biologically with the need to belong. Often, if we don't feel that we belong, and therefore aren't included and not accepted for who we are and what we do, then we don't want to be productive.

Ensuring you have a happy work force is morally the right thing to do, of course, but it makes good economic sense as well. While it's important to have numbers, data and diagnostic tools to "measure and manage", at the heart of all change is the human will for it to happen.

For true, authentic change to occur then hearts and minds company-wide need to be engaged. If we don't change the minds of leadership teams in a positive way, then those interventions that are so badly needed won't be put in place and we are never going to get anywhere.

"It is encouraging to see such a holistic data set on inclusion and diversity, providing valuable insights on the current state of play across UK businesses. While businesses continue to make progress in many areas, the results also highlight the work we still have to do to achieve greater equality. We know that our identities, backgrounds and circumstances are multi-faceted, so by taking a holistic approach to inclusion, across the ten areas outlined in the report, we can ensure intersectional impacts are visible and that we pursue an integrated response so that everyone is able to thrive and reach their full potential."

**KEVIN HOGARTH**, PARTNER – CHIEF PEOPLE OFFICER, KPMG UK

“Across the facets, the findings reinforce some of the things we see in our work at Business Disability Forum: the importance of senior leadership and the need to balance a consistent global approach with what resonates locally. Whether diversity, equity and inclusion (DEI) leaders report directly into the CEO or not (and most often they do not) is far less important than the CEO being willing to listen and change things as a result. Values-based leadership is critical. Wherever DEI sits, when the CEO is the right type of inclusive leader, it is still being driven by the passion and motivation to improve experience that the CEO is pushing throughout every area of the organisation. We also see that businesses which are truly moving the dial on inclusion are combining a coherent global strategic approach with local flexibility; the flexibility to use local drivers, cultural motivators and communication channels to effect lasting change.”

**DIANE LIGHTFOOT**, CEO, BUSINESS DISABILITY FORUM

“The MD Review provides an opportunity for organisations to take a step back and reflect with their peers on how they are doing against a broad range of diversity facets that holistically reflect the modern communities they serve. We must all be prepared to look in the mirror and truly understand how much we are progressing in order to take the action that is needed to make a difference. This report provides us with rich insight.”

**HELEN WEBB**, CHIEF PEOPLE AND SERVICES OFFICER, CO-OP

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## CASE STUDY

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# BARCLAYS

### Employee Resource Groups

For over 15 years in Barclays, diversity networks have provided a space for colleagues to celebrate diversity and foster belonging. More recently, we have noticed that they are playing an ever-increasing role as a sounding board for the business, driving a better understanding of the needs of our customers, clients and the communities we serve, as well as supporting our colleagues of all dimensions of difference. To recognise this important role, in 2021 we began an evolution of these diversity networks to fully-fledged Employee Resource Groups (ERGs), with an official relaunch early in 2022. We focused on elevating some of our Forums, and clarifying some of our communities, expanding to 12 ERGs (up from 7). We are proud to say that we now have ERGs with over 25,000 unique members, allies and sponsors globally.

In addition to supporting our business objectives, we know that the voice of our colleagues is incredibly important. Through our ERGs, we have a powerful channel that enables us to listen to, understand and support the multiple dimensions of difference of our colleagues locally, nationally and internationally. They work collaboratively to strengthen our focus on intersectionality, helping us to drive our D&I objectives. The ERGs amplify the unique challenges of diverse groups at Barclays, providing insight into colleague sentiment and experience. They also actively help the bank make the right decisions for its customers, clients and communities, and support with the development of products and services that are truly inclusive.

Our ERG's also reflect the importance of allyship to drive diversity, equity and inclusion, and therefore many of our ERGs also have an allyship initiative, including Male Allies, Race Champions, Spectrum Allies and Reach Purple Champions.

Our ERG's are of made up the following:

- **Asian Professionals Resource Group**
- **Barclays Military Resource Group**
- **Black Professionals Resource Group**
- **Emerge**, the Early Careers Resource Group
- **Evolve**, the Progressing Careers Resource Group
- **Inspire**, the Social Mobility Resource Group (Pilot)
- **Latin Professionals Resource Group**
- **Multicultural Resource Group**
- **Reach**, Disability, Mental Health and Neurodiversity Resource Group
- **Spectrum**, the LGBT+ Resource Group
- **Win**, the gender resource group
- **Working Families Resource Group**

"The McKenzie-Delis Review continues to push the boundaries for a deeper and more action-focused commitment to DEI. Its emphasis on the power of a commitment from leadership at the very top resonates with my own experience of conversations with leaders from across our business, and encourages a more progressive approach that can truly move the dial.

The insights from this Review will really help to drive progress. Across all facets, and with a strong focus on intersectionality, the McKenzie-Delis Review emphasises the importance of accountability. It encourages companies to drive progress just as in any other part of the business, with clear goals and measures. This is the approach we are taking at Barclays – we've set clear and challenging ambitions. Our leadership recognises the power of diversity as a catalyst for performance and value, and as part of the universal language that drives our business. The Review is a powerful asset that will enable other businesses to do the same."

**RAY DEMPSEY**, GROUP CHIEF DIVERSITY OFFICER, BARCLAYS

# CONCLUSION

**The McKenzie-Delis Review is not only a comprehensive diagnostic tool but a significant step forward in how diversity and inclusion (D&I) is measured. The review provides a unique level of insight into where your organisation is, and what more you need to do.**

The McKenzie-Delis Review encourages all organisations to take action based on real, measured facts rather than ‘common sense’ or opinion. An open and honest analysis can help your organisation understand where you may have equity issues and provide a data-based foundation in order to set goals and where to focus initiatives related to diversity, equity and inclusion.

The stories and best practice shared in this report can easily be translated to any organisation large or small and our hope is that it will equip business leaders around the world with the insight, inspiration and best practice needed to make real, measurable change.

This review and diagnostic tool are the future, the start of a new industry standard where companies recognise and report on many different aspects of D&I.

“I have reviewed the report and findings from this year and there are certainly some very encouraging aspects to the report and we can see progress being made. However, when we break down each of the facets, there is clearly a long way to go. Diversity and inclusion is clearly on the agenda for many organisations and we appear to be alive to this issue but it is important that the conversations and discussions continue – especially from the top levels of the organisations. Only if there is clear engagement with the C-Suite will change take place at all levels within organisations.”

**RUPINDER BAINS**, MD, PINDER REAUX & ASSOCIATES, BOARD MEMBER, THE FOOTBALL ASSOCIATION AND BOARD MEMBER ON THE WOMEN’S FOOTBALL BOARD

“It is good to see that almost all those responding say they have ethnicity as part of their diversity strategy and that more than half the organisations reported having leadership diversity initiatives. However, there is no evidence as yet that this is actually enough to change the face of the leadership of organisations. Organisations need to be clear about the outcomes that they are trying to achieve and put in place the incentives to deliver those.”

**PAUL MONEKOSSO CLEAL OBE**, NED, GUY’S & ST THOMAS’ NHS TRUST, MET POLICE, BOARD ADVISER TO PREMIER LEAGUE

“While the intentions around diversity and inclusion in UK companies are clearly positive and forward-looking, there still remains a significant intention-behaviour gap which, combined with historical inequities in the workplace, leads to low representation of ethnically and sexually diverse employees in leadership positions.

There is a clear lack of understanding of the benefits of diversity in the workplace in the form of disability, with two-thirds of employers not looking to increase the number of disabled staff. This is very disappointing to see and does not demonstrate appreciation of the value of different perspectives and backgrounds within the workplace. Positive findings for many facets, including nationality, religion, age and gender (to some extent) and parenthood, though parenthood appears far more geared towards maternity than paternity leave.”

**JALI PACKER**, RESEARCH FELLOW, MCKINSEY GLOBAL INSTITUTE

# FINAL WORDS

“This survey confirms that companies react to media and government pressure with gender and ethnicity scoring the highest levels of focus. All other facets are left wanting, probably because companies or individuals are not being held to account for performance in these areas.”

**DENISE KEATING**, CEO, UMBRELLA HR

## **LEILA MCKENZIE-DELIS**

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**FOUNDER OF THE MCKENZIE-  
DELIS REVIEW**

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One of the oldest pieces of management advice is ‘what gets measured gets done’. We’re seeing this approach to ring true from the companies that have taken part in the McKenzie-Delis Review. They are actively tracking their progress to demonstrate if, and how, they are moving the needle, and are able to identify areas they need to put more focus on.

Companies that choose to track and measure holistic diversity show a commitment to a better workplace without bias. Taking diversity and inclusion tracking and measurement seriously, as they do every other aspect of their business, will see their reputation benefit among current and prospective employees, customers and shareholders, and will set them apart as true vanguards in the space.

Some companies are already doing some great things, but there are plenty of others that haven’t done enough or even scratched the surface. I believe the UK’s biggest companies have a responsibility to lead by example and we need to see more organisations blazing a trail to lead the way.

Diversity and inclusion are complex subjects, but understanding the ten different facets as we see them and shining a light on best practices is one way that we will be able to shift the dial. Not just for the short term, but for good. It’s an ongoing battle, but one which is certainly worth the fight.

**Leila McKenzie-Delis**

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# CONTRIBUTORS

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## McKENZIE-DELIS FOUNDATION TRUSTEES

### McKENZIE DELIS FOUNDATION

The McKenzie Delis Foundation is a charitable organisation committed to driving research and insight into how businesses are moving the dial on diversity, equity, inclusion and belonging in the workplace. The Foundation's mission is to create a more open, diverse and inclusive society and help organisations grow authentic cultures to unlock more innovation, more creativity and more profitability.

<https://www.mckenziedelisfoundation.com>

### LEILA McKENZIE-DELIS

FOUNDER OF THE McKENZIE-DELIS FOUNDATION AND CEO OF DIAL GLOBAL

Leila McKenzie-Delis is a British Chinese millennial activist and CEO of DIAL Global. Leila leads multiple businesses including DIAL Global (Diverse, Inclusive, Aspirational Leaders) a peer learning network designed to move the dial on diversity, inclusion and belonging.

In June of 2021, Leila established the McKenzie-Delis Foundation, a UK charity, whose mission is to create a more open, diverse and inclusive society and help organisations grow authentic cultures to unlock more innovation, more creativity and more profitability.

The McKenzie-Delis Foundation was born out of Leila's experiences, desire and absolute determination to move the dial on diversity to create a more equitable and inclusive society. Leila's vision is one in which all are welcome to the boardroom in business and beyond in a world that harnesses the power of intersectionality and difference in moving the dial.

### ZAREENA BROWN

CO-CHAIR OF THE McKENZIE-DELIS FOUNDATION AND CHIEF PEOPLE OFFICER AT ROYAL MAIL

With over 20 years' experience, Zareena is an expert in leading the whole people agenda, transformation/change management, culture and values change, talent and leadership at some of the UK's largest organisations. She is passionate about talent development, diversity and building companies where colleagues can bring their whole selves to work.

"I believe that our organisations, economies and society are strongest when we embrace equality and inclusion to its fullest and that means opening the door to possibility and opportunity to everyone."

### SUZIE WELCH

TRUSTEE OF THE McKENZIE-DELIS FOUNDATION AND GROUP CHIEF PEOPLE OFFICER AT ODEON CINEMAS GROUP

A skilled and passionate HR professional, Suzie has more than 20 years' experience working in top global hospitality and leisure organisations.

"I am passionate about inclusion because I believe that every opportunity should be available to all, whoever you are and whatever your circumstance. We should celebrate difference as it gives richness to the environment around us and enables all of us to achieve more."

## **PAULINE MILLER**

TRUSTEE OF THE MCKENZIE-DELIS FOUNDATION AND CHIEF EQUITY OFFICER, EMEA AT DENTSU INTERNATIONAL

An experienced senior leader and business psychologist across Diversity, Equity and Inclusion, Culture transformation and Leadership and Learning, building inclusive and high performing cultures that create meaningful impact for colleagues, clients, communities and external stakeholders.

## **ANDREW DENTON**

CO-CHAIR OF THE MCKENZIE-DELIS FOUNDATION AND CHIEF EXECUTIVE OFFICER AT ALFA FINANCIAL SYSTEMS

An experienced global leader, Andrew is responsible for driving growth, profitability and success at Alfa Financial Systems with over 30 current clients and 26 countries served.

“Diversity and inclusion are fundamental. Excluding, suppressing, or aggressing someone just because they are different to you is fundamentally wrong; any form of prejudice or bigotry is fundamentally wrong. I believe that sincerely and passionately. Which is why I believe that we all have a responsibility to take tangible actions that move us towards lasting change in the form of a more inclusive, equal and equitable workplace and wider society.”

## **DEAN CURTIS**

TRUSTEE OF THE MCKENZIE-DELIS FOUNDATION AND GROUP MANAGING DIRECTOR – RISK AND BUSINESS ANALYTICS AT RELX

Dean serves as CEO across the firm’s portfolio of companies and provides executive leadership to all functional areas of the Cirium and ICIS businesses, serving customers in more than 140 countries.

“It is my belief that you become the people you touch and life is short. Spend time on something which has your passion and surround yourself with inspiring people that are totally committed and enable you to be at your best too. So far in my career I have worked for, and with, some remarkable people and feel I am blessed. As part of this it is an obligation to give back and work on different charitable initiatives like the McKenzie-Delis Foundation.

All high performance and successful teams, businesses, communities and nations have inclusion at their heart and a high degree of psychological safety. Without inclusion, sustainable diversity cannot exist. Inclusion is imperative to promote breadth of thought, innovation and best outcomes, driven from difference in experience, backgrounds and beliefs and ensuring everyone can be the very best version of themselves, always.”

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# UK REVIEW COMMITTEE

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**Lord Simon Woolley (Co-Chair)**

Principal at Homerton College, Cambridge University

**Bina Mehta (Co-Chair)**

Chair, KPMG UK

**Ben Page (Co-Chair)**

CEO, Ipsos

**Sam Allen**

Managing Director, Sam Allen Associates

**Joanna Allen**

CEO, GRAZE

**Andrew Allner**

Chairman, SIG Group Plc

Chairman, Shepherd Building Group Limited

**Shoku Amirani**

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**Paulette Cohen**

Head of Diversity and Inclusion, Barclays Bank

**Rupinder Bains**

MD, Pinder Reaux & Associates, Board Member, The FA, and Board Member, Women's Football Board

**Sanjay Bhandari**

Chair, Kick it Out

**Lianna Brinded**

Director | Creative Content Development, Yahoo

**Kari Daniels**

CEO, Tesco Ireland

**Carole Easton**

CEO, Centre for Ageing Better

**Debbie Hewitt MBE**

Plural Non-Executive Chairman, VISA Europe, BGL Group, White Stuff, The FA

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**Nancy Kelly**

CEO, Stonewall

**Steve Kenzie**

Executive Director, UN Global Compact

**Ruwan Kodikara**

Vice President, Corporate Comms, International, Sony Music Entertainment

**Diane Lightfoot**

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Global Head of Diversity and Inclusion, ISS A/S

**Fiona Vernon**

Senior Manager Diversity, Equity and Inclusion International Markets, Walgreens Boots Alliance

**Helen Webb**

Chief People and Services Officer, Co-op

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# ABOUT THE CONTRIBUTORS

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## **MICHELLE AUDETTE**

MANAGING DIRECTOR OF THE MCKENZIE-DELIS FOUNDATION, EDITOR OF THE MCKENZIE-DELIS REVIEW AND CHIEF MARKETING OFFICER OF DIAL GLOBAL

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Michelle is a senior strategic marketing professional with over 20 years' experience of driving global marketing and strategy in both FMCG and B2B arenas in large corporate and agile SME entities. She is passionate about equality and splits her time working across the McKenzie-Delis Foundation and DIAL Global.

Originally from the Boston area, Michelle is an American who has lived in the UK for over 20 years. She is an experienced and motivational leader who grows capability and thrives when working with high performing teams.

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## **CLARISSA VALIQUETTE**

INTERIM RESEARCH DIRECTOR OF THE MCKENZIE-DELIS REVIEW

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Clarissa has over 20 years of experience in research and insights, both on the vendor and client side across two continents. She specialises in building strategies using a bottom-up, insight-led approach, customer needs identification and prioritisation, journey mapping workshops, and Net Promoter Score systems and governance. Clarissa helps companies bring their brand to life with purposefully-designed customer experiences and data-driven insights.

Born in Germany, she moved to the UK via Canada six years ago. She now lives in Southwest London with her "lets-go-to-the-beach" husband, 9-year old "always-cartwheeling" daughter, 4-year old "what-are-we-cooking" son, a cuddly cat and a very noisy goldfish.

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## **FLICK COLLINGWOOD**

CHIEF OF STAFF OF DIAL GLOBAL AND THE MCKENZIE-DELIS FOUNDATION

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With over 20 years in FMCG, Flick is a trusted team leader with extensive commercial operations experience motivating and developing teams to be their best to make things happen. She has a strong track record of adding sustainable bottom-line value through programme and project delivery across diverse functions within a business with a genuine passion to deliver while remaining authentic. Driving and building a diverse workforce with inclusion at its heart to deliver a high performance culture through all her teams has always been core to Flick's values.

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# ACKNOWLEDGEMENTS

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This report would not have been possible without the help and support of so many people who care deeply about creating change in the world.

A special thanks goes out to:

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## COSTA DELIS

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whose support always goes above and beyond.

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## THE DIAL GLOBAL TEAM

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Michael Rossi

Kate Williams

Jodie Buck

Amy Baker

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## IPSOS TEAM

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Ellie Shaw

Trinh Tu

Harry Williams

Simona Banerjee

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# STRATEGIC PARTNERS

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## DIAL GLOBAL™

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DIAL Global™ is a global community for Diverse Inclusive Aspirational Leaders. Our purpose is to create a more open, diverse and inclusive society and help organisations grow authentic cultures to unlock more innovation, more creativity and more productivity.

Our DIAL Global™ community brings together diversity and inclusion (D&I) change agents to access exclusive connections, perspectives and knowledge that help us stay ahead in the ever-evolving D&I landscape and achieve workplace D&I faster. Our community supports the sharing of personal stories, experiences and best practice for our community to collectively lead measurable change across all ten facets of D&I.

DIAL Global™ facilitates the sharing and transferring of best practice methodologies and knowledge through our world-class network and global summits.

[www.dialglobal.org](http://www.dialglobal.org)

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## KPMG

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KPMG LLP, a UK limited liability partnership, operates from 21 offices across the UK with approximately 16,000 partners and staff. The UK firm recorded a revenue of £2.3 billion in the year ended 30 September 2020.

KPMG is a global organisation of independent professional services firms providing Audit, Legal, Tax and Advisory services. It operates in 147 countries and territories and has more than 219,000 people working in member firms around the world. Each KPMG firm is a legally distinct and separate entity and describes itself as such. KPMG International Limited is a private English company limited by guarantee. KPMG International Limited and its related entities do not provide services to clients.

<https://home.kpmg>

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## LEXISNEXIS® RISK SOLUTIONS

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LexisNexis® Risk Solutions provides customers with solutions and decision tools that combine public and industry specific content with advanced technology and analytics to assist them in evaluating and predicting risk and enhancing operational efficiency.

We use the power of data and advanced analytics to help our customers make better, timelier decisions. Our innovative solutions enable organisations to manage risks like identity theft, fraud, money laundering and terrorism, and prevent financial crimes, and insurance and government benefit scams. We help those without traditional credit histories obtain access to funds, assist agencies to find uncollected revenue, and research ways to improve business outcomes for healthcare companies. We also work with law enforcement to solve crimes.

By bringing clarity to information, we ultimately help make communities safer, insurance rates more accurate, commerce more transparent, business decisions easier and processes more efficient.

LexisNexis® Risk Solutions is part of LexisNexis® Risk Solutions Group (RSG), a portfolio of brands that span multiple industries providing customers with innovative technologies, information-based

analytics and decision tools and data services that provide market-specific solutions. Approximately 8,700 employees in offices throughout the world support RSG brands by serving customers in more than 180 countries. RSG is part of RELX, a global provider of information and analytics for professional and business customers across industries.

For more information, please visit [www.risk.lexisnexis.com/group](http://www.risk.lexisnexis.com/group) and [www.relx.com](http://www.relx.com).

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## IPSOS

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At Ipsos, we firmly believe that the diversity and range of skills, experiences, backgrounds and ideas creates richer working environments for us all. As an organisation, we want to be as diverse as the people and issues we research, to better reflect and understand the world, and ultimately deliver better research and insight to our clients. The team believe wholeheartedly in the aims of the MD Review and wanted to contribute our skills to deliver insights from the participating organisations. We look forward to continuing our support of the MD Review in the years to come.

Ipsos is one of the world's leading market research companies, present in 90 markets and employing more than 18,000 people. Our passionately curious research professionals, analysts and scientists have built unique multi-specialist capabilities that provide a true understanding and powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. Our business solutions are based on primary data from our surveys, social media monitoring, and qualitative or observational techniques.

[www.ipsos.com/en-uk](http://www.ipsos.com/en-uk)

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## BRITVIC

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Britvic is one of the leading branded soft drinks businesses in Europe. The company combines its own leading brand portfolio including Fruit Shoot, Robinsons, Tango, J2O, Teisseire and MiWadi with PepsiCo brands such as Pepsi, 7UP, Rockstar Energy and Lipton Ice Tea which Britvic produces and sells in Great Britain and Ireland under exclusive PepsiCo agreements.

Britvic is the largest supplier of branded still soft drinks and the number two supplier of branded carbonated soft drinks in GB. Britvic is an industry leader in the island of Ireland with brands such as MiWadi and Ballygowan, in France with brands such as Teisseire, Pressade and Moulin De Valdonne and in Brazil with Maguary, Bela Ischia and Dafruta. Britvic is growing its reach into other territories through franchising, export and licensing. Britvic's management team has successfully developed the business through a clear strategy of organic growth and international expansion based on creating and building scale brands. Britvic is listed on the London Stock Exchange under the code BVIC and is a constituent of the FTSE 250 index.

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## UN GLOBAL COMPACT NETWORK UK

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The United Nations Global Compact is a global platform for business and non-business entities to proactively network and engage in areas of human rights, labour, environment, and anti-corruption. Participation in the UN Global Compact is a widely visible commitment to the implementation, disclosure, and promotion of its ten universal principles.

Local Networks, such as the UK Network, are clusters of UN Global Compact participants who come together to advance the UN Global Compact and its principles within a particular geographic context. Our role is to help organisations engage in the UN Global Compact with respect to implementation of the Ten Principles, and create opportunities for multi-stakeholder engagement and collective action.

[www.unglobalcompact.org.uk](http://www.unglobalcompact.org.uk)

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## ACCENTURE

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Accenture is a global professional services company with leading capabilities in digital, cloud and security. Combining unmatched experience and specialised skills across more than 40 industries, we offer Strategy and Consulting, Interactive, Technology and Operations services – all powered by the world’s largest network of Advanced Technology and Intelligent Operations centres. Our 674,000 people deliver on the promise of technology and human ingenuity every day, serving clients in more than 120 countries. We embrace the power of change to create value and shared success for our clients, people, shareholders, partners and communities.

**[accenture.com](https://www.accenture.com)**

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## JDJ CREATIVE

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JDJ Creative is a graphic design agency that goes further. Our mission is to enable our clients to communicate more effectively and improve their brand reach by taking complex ideas and making them effortless to understand, visually.

**<https://jdjcreative.co.uk/>**

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# RESEARCH PARTNERS

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## BUSINESS DISABILITY FORUM

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Business Disability Forum is a not-for-profit membership organisation which brings business leaders, disabled people, and government together to improve the lives and increase the economic participation of disabled people.

They do this by bringing business leaders, disabled people, and government together to understand what needs to change to improve the life opportunities and experiences of disabled people in employment, economic growth, and society more widely.

Their 300+ Members and Partners represent a huge cross sector of UK and global business, employing an estimated 20% of the UK workforce and eight million people worldwide. They provide them with a wealth of practical advice and support, thought leadership and networking opportunities so that they can share what works – and what doesn't.

In turn, they share this feedback and experience with government and policy makers to help shape disability policy that works.

<https://businessdisabilityforum.org.uk/>

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## STONEWALL

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Stonewall was founded in 1989 by a small group of people (including Sir Ian McKellen) who had been active in the struggle against Section 28 of the Local Government Act. Section 28 was an offensive piece of legislation designed to prevent the so-called 'promotion' of homosexuality in schools; as well as stigmatising lesbian, gay and bi people, it galvanised the LGBT community.

The aim from the outset was to create a professional lobbying group that would prevent such attacks on lesbians, gay and bi people from ever occurring again. Stonewall has subsequently put the case for equality on the mainstream political agenda by winning support within all the main political parties and now has offices in England, Scotland and Wales. In 2015, and following a six-month consultation with trans communities, Stonewall became trans inclusive.

<https://www.stonewall.org.uk/>

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## CENTRE FOR AGEING BETTER

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The UK's population is undergoing a massive age shift. In less than 20 years, one in four people will be over 65. The Centre for Ageing Better is working to ensure that everyone can have a good later life. It aims to support people to work for as long as they want and are able to by helping employers create age-friendly workplaces and by improving support for older jobseekers. Ageing Better is also working to change wider policy and practices to improve health, housing and communities.

<https://www.ageing-better.org.uk/>

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## MINDS@WORK

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Minds@Work is a community-led charity which works to inspire and equip organisations to eradicate the stigma of mental illness and create a healthier working world.

In a landscape burgeoning with “experts” on mental health, they stand proudly as a community of “learners” in relentless pursuit of the most progressive ideas and solutions.

They don’t sell products or services and so are completely independent. They occupy the space of connector, curator, convener, collaborator and a catalyst for the difficult conversations on mental health topics that are still taboo.

<https://www.mindsatworkmovement.com/>

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## POWER OF THE PARENT®

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Charlotte Speak is the founder at Power of the Parent® where she collaborates with businesses who are wanting to proactively support their teams and drive engagement throughout what is a period of significant change for everybody involved.

The mission at Power of the Parent® is about generating conversations that positively challenge some of the negative narrative that parents in the workplace can face, as well as helping businesses build on what they’re already great at. Parents return to work with so many untapped skills, drive and experiences, and Charlotte thrives on showing all the amazing things that can happen for employers when they have working parents on their side.

Using a strengths-based approach to workshops and coaching, Charlotte understands first-hand the positive impact this way of working can have on productivity, engagement, confidence and wellbeing.

<https://www.power-of-the-parent.com/>

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## MIND

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Mind is a mental health charity in England and Wales. Founded in 1946 as the National Association for Mental Health (NAMH), it celebrated its 70<sup>th</sup> anniversary in 2016.

Mind provide advice and support to empower anyone experiencing a mental health problem and they campaign to improve services, raise awareness and promote understanding.

It also works to raise public awareness and understanding of issues relating to mental health. Since 1982, it has awarded an annual prize for “Book of the Year” having to do with mental health, in addition to three other prizes. Since 2008 Mind has hosted the annual Mind Media Awards, celebrating the best portrayals and reporting of mental health across the media.

<https://www.mind.org.uk/>

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# APPENDIX

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## Scoring the facets

Participants were asked yes or no questions on a series of statements related to each facet. Each “yes” answer scored 2 points, “don’t know” scored 1 point and “no” scored 0 points. The average score across all statements per facet was then calculated, followed by extrapolating this average out over a 100-point scale to provide more granularity.

\*Exception: The following questions scored 2 points for each “no” and 0 points for each “yes”:

- Take into consideration the college background of employees you recruit or promote to leadership.
- Require applicants for trainee positions to hold an undergraduate degree.

## Demographics

How many people does your business employ in the UK including subsidiary companies?

1-999 **34%**

1,000-4,999 **31%**

5,000+ **35%**

Source QSize  
N=85

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Which of the following best describes the industry sector in which your business operates?

Technology / media / telecoms **14%**

Services / retailing **14%**

Financial / banking / insurance **14%**

Manufacturing **13%**

Professional services **8%**

Healthcare / medical **5%**

Utilities **5%**

Construction **5%**

Real estate **4%**

Hospitality / leisure / entertainment **4%**

Mining / minerals / natural resources **2%**

Transport / distribution **2%**

Other **10%**

Source QSector  
N=85

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# TOP PERFORMERS

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Accenture

Autotrader

Aviva

Barclays

Bupa

Co-op

dentsu

Diageo

Hilton

Investec

KPMG

LexisNexis®

Marks & Spencer

Mitie Group

National Grid

Network Rail

PageGroup

Reach Plc

Rentokil

Sage

Softcat

Spirit Energy

Tate and Lyle

The FA

Unilever

\*Note: one top performing company chose not to be named

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# THE MCKENZIE-DELIS REVIEW PARTICIPATING ORGANISATIONS

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**This is a selection of the full sample of participating organisations as not all respondents consented to being publicly listed.**

Accenture

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Alfa

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Autotrader

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Aviva

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Balfour Beatty Plc

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Barclays

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Beazley

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Boots

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Britvic

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Bupa

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Cala Group

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Capital & Regional Plc

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Capital 7 Counties

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Co-op

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CVC Credit Partners

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dentsu

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Diageo

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Direct Line Insurance

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Elementis

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Eurostar

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Fresenius Kabi

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Graze

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HALMA

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Harworth Group

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Havas

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Helios Towers

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HH Global

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Hilton

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Hostel World

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Investec

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Ipsos

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ISS

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Jaguar Land Rover

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KPMG

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Land Securities Group

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LexisNexis®

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Liontrust Assets

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Lookers Plc

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Marks & Spencer

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Medica Group

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Mitie Group

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National Grid

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Network Rail

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Newriver Reit Plc

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o2 Virgin

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ODEON Cinemas Group

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PageGroup

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Pendragon Plc

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Pennon Group

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Post Office

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Reach Plc

---

Rentokill

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Rio Tinto

---

RPS Group Plc

---

Saga

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Sage

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Samworth Brothers

---

Severfield

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Severn Trent Plc

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Smurfit

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Softcat

---

Southwest Water

---

Spirit Energy

---

Stobart Group

---

Superdrug

---

Tate and Lyle

---

The FA

---

The Gap Partnership

---

The Rank Group Plc

---

Unilever

---

William Hill

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## **MCKENZIE DELIS FOUNDATION**

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Warwickshire, United Kingdom, CV32 4EA

UK Registered Charity # 1194798.

**[www.mckenziedelisfoundation.com](http://www.mckenziedelisfoundation.com)**