



Gathering Diversity Demographic Data in a Global Context

Interim Report - January 2012

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1.0 EXECUTIVE SUMMARY

This research, involving 12 multinational organisations, shows that global companies are taking steps to gather, analyse and report key diversity data. Whilst recognising the legal and cultural constraints that exist, the most progressive companies are clearly determined to have data that enable them to track progress, set evidence-based goals for improvement and transparently report progress.

These demographic data are usually gathered at the recruitment stage and some companies then complement this with a voluntary process by which employees can supply or confirm their own details.

Not surprisingly, companies have more data about gender than any other diversity-related demographic characteristic. All the participating companies report globally on gender, they analyse the profile of their employees by gender, and (where they use them) cut their employee engagement surveys by gender. They also recognise the benefits of gathering qualitative data and use employee networks, focus group and interviews in order to build a more comprehensive picture of progress.

The majority of companies also hold and report data relating to age and nationality. Whilst some companies expressed caution about holding or analysing age-related data in the US, most companies do hold the information in their HR databases and half of them do report the data at least internally.

Nationality data are most frequently gathered in EMEA and APAC countries but less frequently so in South and North America. In total, just under half (5/12) of companies included nationality in their employee survey demographics.

Decisions relating to ethnicity and disability (whether to gather the data and the definitions of the categories involved) were seen by many companies as decisions that were best made locally. Ethnicity data were only widely held in the US (8/11) Canada (5/9) and the UK (5/12.) Disability data were more likely to be held in France (3/10) the US (2/11) and the UK (2/12.) A number of companies used qualitative research in order to supplement this "hard data".

Only one company held data on sexual orientation and, in that case, only in the UK. However, there were some indications that companies were using engagement survey demographics to get a better picture of the situation (2 out of 11 companies with surveys asked for this demographic). Companies also used networks, focus groups and 1:1 discussions to discuss employee perceptions

In line with the move to greater transparency in many other areas of corporate governance, 75% (8/12) of the participating companies in this research are reporting publically on diversity data – in their annual reports and/or Sustainability / CSR reports. In our view (see page 10 of this report) the pressures for increased transparency are only likely to grow.

The benefits of gathering, analysing and reporting diversity data are about helping companies to identify and address barriers to the achievement of their diversity-related ambitions whilst also building trust (externally as well as internally) through this transparent reporting of data.

In this regard, it is perhaps not surprising that some respondents expressed frustration that legal concerns (or cultural sensitivities which manifest themselves as legal concerns) were constraining too tightly the nature and amount of data that they were currently gathering and analysing.

There may be scope for greater co-operation here across multinationals to share their understanding of the legal position and to move towards a more enabling approach – with data being gathered in all but a few countries where the legal obstacles really are insurmountable.

Indeed, as a result of this interim report, participating companies may choose to deepen collaboration in this area – and supplement the analysis of these survey returns with more in depth qualitative discussions.

2.0 RESEARCH AIMS

The aims of this research are to understand:

- The extent to which leading multinational corporations hold data regarding different diversity-related demographic characteristics (for instance, gender, race, disability and sexual orientation).
- How they gather and use these data.

3.0 METHODOLOGY

On the basis of the above research aims, Schneider-Ross developed a survey that asked companies about the diversity-related demographic data they held, where they held them and what they did with them.

This draft survey was reviewed with Google (Eleanor Mulligan and Sarah Stuart) and True Blue (Carlton Yearwood and Catherine Smith). The latter is a membership organisation based in the US.

The final survey is included as Appendix 1 of this report.

A list of target global companies was then approached to participate in the research.

Companies were guaranteed anonymity and therefore, in this report, where particular company practices or views are referred to, the companies are referred to by a letter code.

In alphabetical order (not corresponding to the letter code) the participating companies are:

- Axa
- BBC
- BP
- Cargill
- EDF
- Enterprise Rent-A-Car
- Ernst & Young
- Google
- Henkel
- Phillips
- UBS
- Vodafone

4.0 KEY FINDINGS

4.1 What Information Do Companies Hold In Their HR Databases?

- Most commonly-held diversity-related demographic data are gender, age and nationality.
- All companies hold data about gender in all their countries of operation.
- Age data are held by all companies in all the countries in which they operate – except one (Company L) in Korea and one (Company J) in the US.
- Nationality data are held by companies in most EMEA and APAC countries in which they operate (57% - 100%) about half of the Latin American countries (57% - 50%) but less commonly so in North America (36% in the US and 33% in Canada).
- Ethnicity data are only widely held in the US (8/11) Canada (5/9) and UK (5/12).
- Five companies hold data on disability but only one (Company F) for all the countries in which it operates.
- Veteran status is held by only two companies and only in the US (Companies B and L).
- Only one company holds religion/faith data and then only in the UK (Company G).
- Only one company holds sexual orientation data and only in the UK (Company G).
- Only one company (F) holds caring responsibility data and only in the UK and in France.
- No companies hold gender identity expression in any of their countries of operation.

A number of respondents raised the issue that as people in global positions they were not necessarily sure of the full extent of data that may be held on local databases, as one remarked: “There may be other information held on local systems of which I am not aware” (Company H).

Indeed, there was a recognition amongst many respondents that it is only locally that some decisions can be made about what are the most pertinent demographic characteristics to monitor: “*In Greater China, for example, an important cultural difference where we would want to measure fairness and access to leadership opportunities, is about whether individuals are mainland Chinese or Hong Kong Chinese.*” (Company J).

Clearly, it is vital for companies to understand, and be sensitive to, local cultural issues. However, this can also, of course, represent a major barrier to effective monitoring.

A major concern expressed by a number of respondents was doubt about the impact of different legal jurisdictions and what is or is not allowed in terms of gathering and retaining demographic data.

A further concern about global reporting (on characteristics other than gender) was the difficulty of getting consistency of definitions. Ethnicity and disability were both cited as cases in point.

As one company responded “In some cases our legal team is specifically telling us that we cannot consolidate and track measures beyond gender (e.g. age data) globally due to data protection issues. In other cases, the sheer complex nature of local/cultural variances in definition of ethnicity make it impossible to take a global view” (Company E).

Some companies specifically reported not carrying out desirable monitoring activities because of these (perceived) constraints: “we do not track gender information for applicants to avoid any allegations of discrimination, preventing us from actually tracking whether we might have a bias” (Company B).

One company (I) is trying to take a systematic approach: “As the organisation enters new markets in new countries, demographical data will continue to be collected in line with local legislation. We are in the process of understanding what demographical data across all diversity dimensions (primary and secondary) can be collected in each location in order to increase the spread of dimensions covered.”

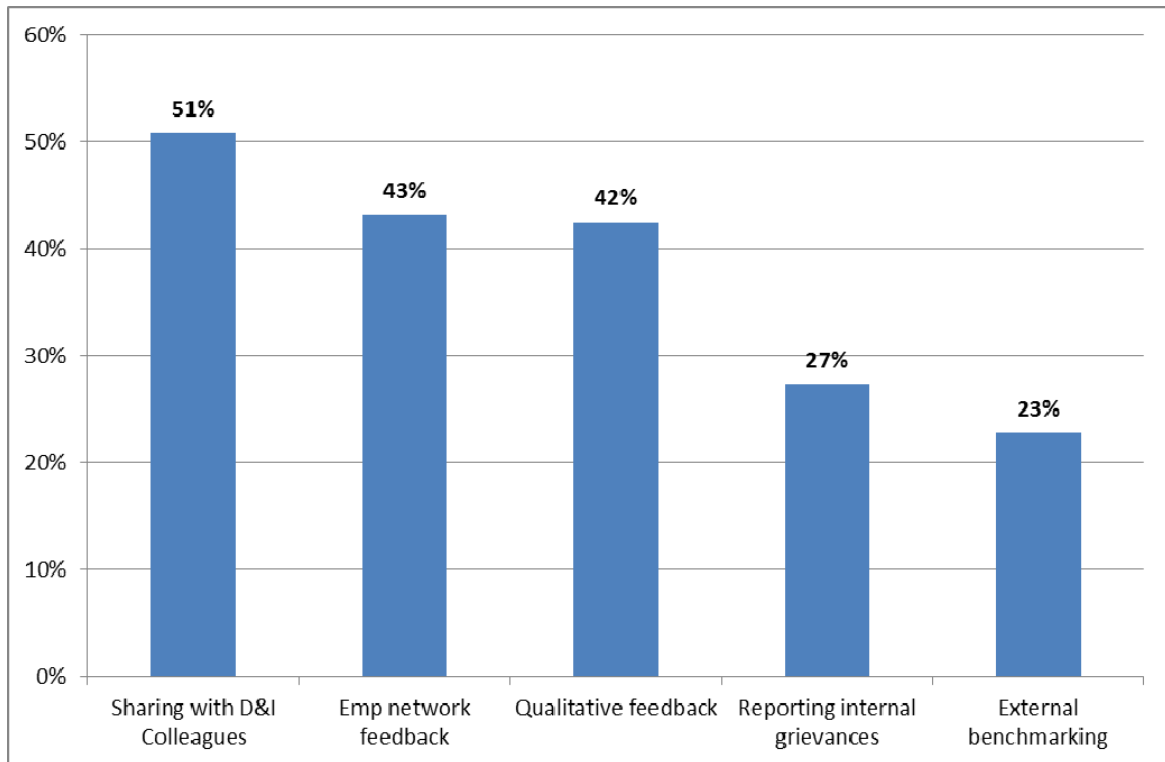
4.2 How Is The Demographic Information In The HR Database Gathered?

- 11 out of the 12 companies gather data at the recruitment stage and one company uses a census form only.
- 2 companies (Companies F and I) rely solely on the recruitment data, 2 companies (H and K) rely on these recruitment data and supplement with management identification where data are missing and the other 7 companies use some combination of methods.
- Completing census forms, or similar mechanisms, is a voluntary activity. 7 companies use a census form and of these 1 uses management identification where data are missing. As an incentive to completion of date of birth data, one company (L) offers a “birthday voucher” and most employees opt in to providing this information.
- Completing census forms, or similar mechanisms, is a voluntary activity.

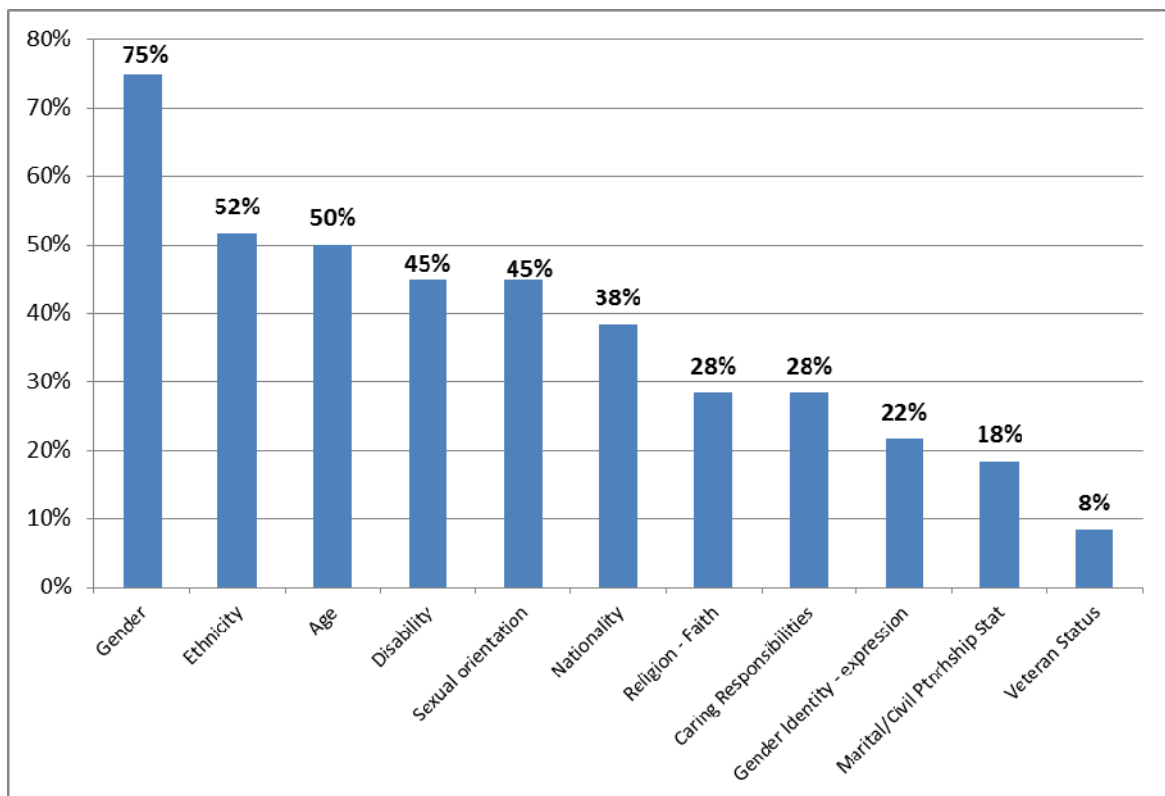
4.3 What Demographic Data Do Companies Gather Through Their People Surveys?

- All companies included gender demographic questions, 9 (75%) included age, and 5 included nationality
- Some companies have deliberately used the people survey demographic questions to get at what the issues might be for demographic groups where it might be more sensitive (or, in some countries, illegal) to hold the demographic data.
- Ethnicity is a characteristic that half the companies (6) chose to include in some locations – including some where holding ethnicity data are deemed to be particularly sensitive (and therefore it may be helpful that the data remains with the survey company not with the organisation itself.)
- Of the six less common characteristics, 3 companies included disability, 3 caring responsibilities, 2 sexual orientation, 2 religion / faith, 1 marital status and 1 gender identity
- One company (J) included five of the additional characteristics, another (Company D) four of the six and one company (G) two of the characteristics.
- Anonymity is protected but where they have asked demographic questions, companies (B, C, D, E, F, G, H, J, K) analyse results by any of the above characteristics and one clear purpose is to identify any variations in engagement levels.

4.4 What Other Ways Do Companies Have Of Measuring Progress?



Graph 1: Other measures of progress (See Appendix 3, page 17 for full results and methodology for calculation of percentages.)

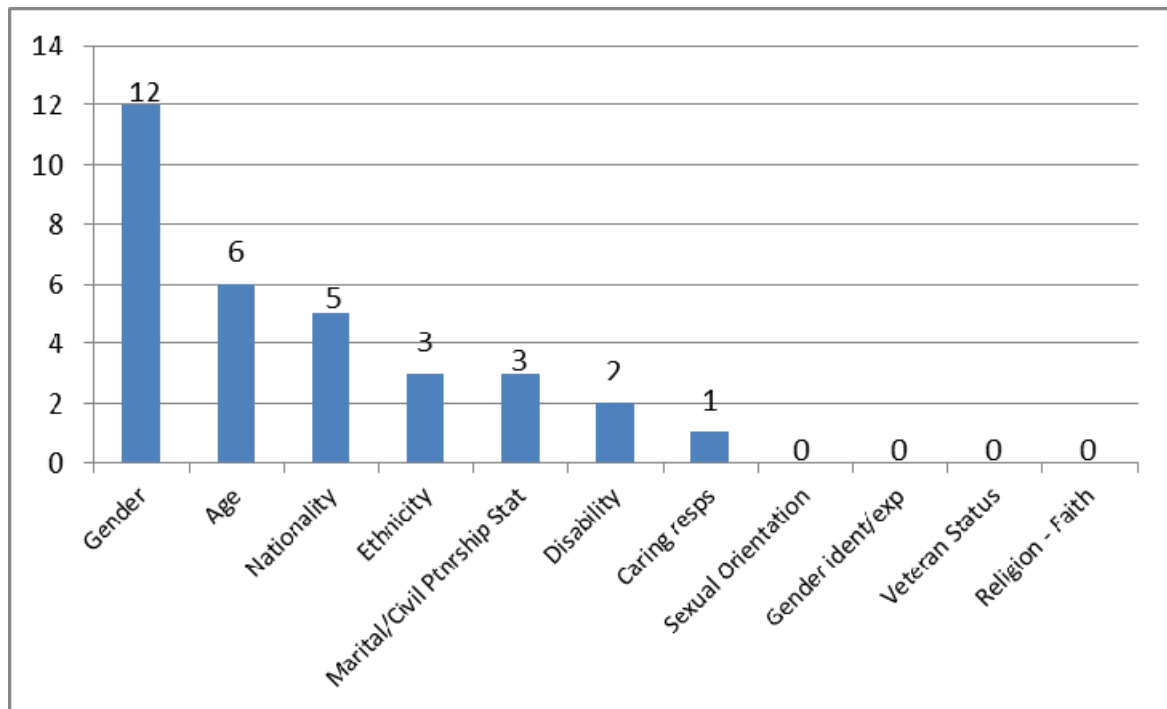


Graph 2: Measures of progress x diversity demographics. (See Appendix 3, page 17 for full results and methodology for calculation of percentages.)

- Companies used a wider variety of measures to review progress on gender than any of the other categories (i.e. 45 out of a maximum score of 60) – see page 17 of Appendix 3 for more details).
- For every characteristic, however, companies recognised the benefits of having multiple measures of progress.
- Perhaps not surprisingly, sharing perceptions with D&I colleagues in other companies was the most commonly chosen option.
- Next most frequently chosen options were different forms of qualitative feedback – either employee networks or focus groups or 1:1 discussions.
- Qualitative discussions were seen as particularly helpful with regard to ethnicity and sexual orientation (perhaps more sensitive demographics?) and focus groups were the most commonly used measures for each of those characteristics
- Qualitative research of this nature obviously works on the basis of volunteers coming forward and one company (L) has a series of mailing lists – eg associated with sexual orientation, religion or carers
- Reviewing of internal grievances was (with the exception of gender) less frequently used
- External benchmarking was clearly more highly developed for gender than other areas – although some did use it for other characteristics.

4.5 What Data Do Companies Report Internally?

- All companies report progress explicitly on gender
- Three companies (H, I, L) just report globally on gender and 9 report on at least one other characteristic
- Three companies (A, D, F) report globally on all three characteristics (gender, age and nationality), three companies (C, E, J) on gender and age, two companies (B, K) report on gender and nationality



Graph 3: Internal reporting of demographic data

- In total half (6/12) of the companies report globally on age, 5/12 on nationality, 3 out of 12 on ethnicity, 3 out of 12 on marital/civil partnership status, 2 out of 12 on disability, 1 out of 12 on caring responsibilities).
- Clearly as a follow up to this report, it might be very useful for companies to have some qualitative discussions comparing the way in which they report and analyse this data.

4.6 What Data Do Companies Report Externally?

- Only three companies (D, K and L) do not report any data externally.
- Most companies report data in either their Annual Reports or in their CSR/Sustainability reports (or in both).
- Gender is the most commonly reported characteristic - usually including representation at different levels and sometimes recorded as progress against declared targets or goals for improvement (Company B).
- Some companies also report publically on nationality (companies B, C, E, H) with a few covering other characteristics – perhaps just in specific locations (Company C on age and disability, Company H on ethnicity and for Company G against all diversity demographics in the UK).
- Some companies also report on specific activities or processes – for instance, Company B on promotions and attrition by gender, Company I on employee networks.

4.7 The Benefits Of, & Increasing Pressures for, Greater Reporting Of Diversity Data

As companies widen their focus beyond gender on diversity, it is not surprising that they start to look to gather data in other diversity-related demographic characteristics. Otherwise external and internal stakeholders would naturally assume that actually the company is only really interested in making progress on gender.

From the range of responses received, it is possible to summarise the main purposes that companies have for gathering diversity-related data as follows:

- To identify progress being made on a regular basis (on a monthly, quarterly or annual basis)
- To identify any possible bias or discrimination against “under-represented” populations
- To identify root causes of (say) different representation patterns or engagement levels
- To set evidence-based improvement target or goals
- To hold leaders to account for progress (often using a “dashboard”)
- To provide transparency, internally and externally, and build trust in the company’s intent to improve.

Whilst they are not perhaps the main purpose having demographic data there are a number of other benefits that companies are realising.

Having an identified group of employees from a particular diversity-related demographic characteristic enables the company to engage those employees in discussions about particular HR policies (for instance, relating to possible benefit changes or recruitment practices.)

In addition, companies with a strong consumer orientation are also finding it useful to consult with different demographic groups of employees about new products or services.

There are, therefore, a number of strong benefits that are driving companies to: (1) widen the range of diversity data that they gather and (2) report both internally and externally. In our view, the benefits are in themselves strong enough to drive this trend. In addition, however, we would also argue that the external (governmental and social) pressures for increased transparency are only likely to grow. The trend is clear on gender and, in time, may well widen to other demographic characteristics.

A number of countries either now already have, or are actively considering introducing, quotas for the representation of women on boards. Public reporting of data goes hand-in-hand with quotas. Even where countries have not introduced quotas, there is increased pressures for transparency – both Denmark and Sweden have an approach described as “comply or explain” and in the UK, as part of his argument for FTSE 100 companies to move towards 25% representation of women on Boards, Lord Davies called for disclosure of the representation of women on Boards, in the Senior Executive and in the company as a whole.

Nor, of course, is this just confined to Europe. There have long been requirements for reporting of diversity data in the US and South Africa and in Australia, from July 2010, reporting guidelines require data about gender diversity.

APPENDIX 1: The Final Survey

Data Tracking Benchmark 2011

All information in this survey will be treated as confidential. If you have any queries about this questionnaire please email alexis.w@schneider-ross.com.

Please provide your name, organisation and contact details

Q1 On which of the following diversity dimensions do you report explicitly on progress globally?

Gender	<input type="checkbox"/>	Gender identity / expression	<input type="checkbox"/>
Age	<input type="checkbox"/>	Veteran Status	<input type="checkbox"/>
Nationality	<input type="checkbox"/>	Religion / Faith	<input type="checkbox"/>
Disability	<input type="checkbox"/>	Marital/Civil Partnership Status	<input type="checkbox"/>
Ethnicity	<input type="checkbox"/>	Caring responsibilities	<input type="checkbox"/>
Sexual Orientation	<input type="checkbox"/>		

Q2(a) In which of the countries listed below do you hold demographic data in your HR database on any of the diversity dimensions
(Please tick all that apply)

EMEA	Gender	Age	Nationality	Disability	Ethnicity	Sexual Orientation	Gender identity/ expression	Veteran Status	Religion / Faith	Marital / Civil Partnership Status	Caring Responsibilities
UK	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ireland	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
France	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Germany	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Switzerland	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Italy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Spain	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Netherlands	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Scandinavia	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Poland	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Russia	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Israel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Kenya	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Turkey	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
South Africa	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

APAC	Gender	Age	Nationality	Disability	Ethnicity	Sexual Orientation	Gender Identity/ expression	Veteran Status	Religion / Faith	Marital / Civil Partnership Status	Caring Responsibilities
India	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
China	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Japan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Australia	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Korea	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Singapore	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Malaysia	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Taiwan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
North America	Gender	Age	Nationality	Disability	Ethnicity	Sexual Orientation	Gender Identity/ expression	Veteran Status	Religion / Faith	Marital / Civil Partnership Status	Caring Responsibilities
USA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Canada	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
LatAm	Gender	Age	Nationality	Disability	Ethnicity	Sexual Orientation	Gender Identity/ expression	Veteran Status	Religion / Faith	Marital / Civil Partnership Status	Caring Responsibilities
Argentina	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Brazil	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mexico	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Any other country of operation where you gather a range of demographic data relating to diversity.

Q2(b) Please add any comments about the geographical spread of this data and the coverage of different diversity dimensions. Are you keen to increase the spread of countries? Increase the spread of dimensions covered? What experience if any have you had of trying to do this? What has been helpful in trying to track this additional data? What concerns do you have about doing this? (Please comment)

Q3 How do you use these data? What reports do you produce - analysis of representation at different levels? Salaries? Performance grades? Promotions? Employee satisfaction/engagement? (Please comment)

Q4 How do you gather these data? (Please tick all that apply)

Employees respond to a census form

At the recruitment stage

Management identification where the data is missing

Other (Please describe)

Q5 (a) **Do you hold any of this demographic data on other HR or management systems?** (eg one associated with recruitments or with succession planning and high potential/talent management processes)

Yes

No

Q5(b) **If yes, which systems do you have and what do you analyse or report on?**

Q6(a) **Which of the following diversity dimensions (that are relevant) are included in the demographic questions in your global people survey?**
(Please tick all that apply)

Gender	<input type="checkbox"/>	Gender identity / expression	<input type="checkbox"/>
Age	<input type="checkbox"/>	Veteran Status	<input type="checkbox"/>
Nationality	<input type="checkbox"/>	Religion / Faith	<input type="checkbox"/>
Disability	<input type="checkbox"/>	Marital/Civil Partnership Status	<input type="checkbox"/>
Ethnicity	<input type="checkbox"/>	Caring responsibilities	<input type="checkbox"/>
Sexual Orientation	<input type="checkbox"/>		

Q6(b) **By which of these dimensions do you currently analyse your survey results?** (Please comment)

Q6(c) **Are survey responses linked to individual employees or fully anonymous?** (Please comment)

Q7 **How else do you seek to measure internal progress on different diversity dimensions?**

	Gender	Age	Nationality	Disability	Ethnicity	Sexual Orientation	Gender identity/ expression	Veteran Status	Religion / Faith	Marital / Civil Partnership Status	Caring Responsibilities
Rigorous external benchmarking completed independently	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sharing perceptions with D&I colleagues in other companies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reporting of internal grievances or cases	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Feedback from employee networks/resource groups	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Qualitative feedback - 1:1 discussions and/or focus groups, ombudsman	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q8 **What data do you find most helpful in developing your Diversity & Inclusion strategies for different diversity dimensions?** *(Please comment)*

Q9 **Which, if any, of these data do you report publically - eg in Annual Reports, Diversity & Inclusion Reports, Social Responsibility, Sustainability Reports or on your website?** *(Please comment)*

Q10 **Please add any other comments or observations about this project. What would you like to know from other companies in order to make this exercise beneficial to you.** *(Please comment)*

Thank you for your participation. Please email your completed questionnaire to alexis.w@schneider-ross.com

APPENDIX 2: Profile Of Each Company With Key Aspects Of What They Do?

Company A:

Reports globally on Gender, Age and Nationality – gathering data at the recruitment stage and with a census form. These demographic categories are also included in their people surveys. Data on these categories are reported annually in a Sustainability report and a quarterly report on progress is circulated internally.

Company B:

Reports globally on Gender and Nationality – gathering data at the recruitment stage and with a census form. However data on Age are also held across their areas of operation. Only a demographic question on Gender is included in their people surveys. Progress on the representation of women at different levels of the organisation, together with details of the nationality of executives is included in public reports.

Company C:

Reports globally on Gender, Age and Disability – gathering data through a census form. Demographic questions on Gender, Age and Nationality are included in their people surveys. Data on Gender, Age and Disability are reported publically in one specific country of operation and other public reports include Nationality.

Company D:

Reports globally on Gender, Age, Nationality, Ethnicity and Marital/Civil Partnership Status – gathering the information via a census form, at the recruitment stage and through management identification where data are missing. Their people surveys include demographic questions on Gender, Age, Disability, Ethnicity, Sexual Orientation, Religion/Faith and Marital/Civil Partnership Status. However, no demographic data are currently reported publically.

Company E:

Reports globally on Gender and Age. Data on Nationality and Ethnicity are also held for their areas of operation (where applicable). Data are gathered at the recruitment stage. Their people surveys includes demographic questions on Gender, Age and Nationality. Public reports include data on Gender and Nationality only.

Company F:

Reports globally on Gender, Age, Nationality, Disability and Marital/Civil Partnership Status with data gathered at the recruitment stage only. Their people surveys include demographic questions on Gender, Age and Caring Responsibilities. Dependent on the country of publication some or all of the information above is included in public reports on Social Responsibility and Sustainability.

Company G:

Reports globally on Gender and Ethnicity although data are also held on Age, Disability, Sexual Orientation and Religion/Faith for one area of operation. Data are gathered via recruitment and a census form. Demographic questions on Gender, Age, Disability, Ethnicity and Caring Responsibilities are included in people surveys. Data published publically is dependent on the location although some (Gender) is included in global reports.

Company H:

Reports globally on Gender but additional data on Age, Nationality and Ethnicity is held in for some of their areas of operation. Data are gathered at recruitment and through management information where data are missing although this applies to the top 500 employees only. People surveys include demographic questions on Gender, Nationality and, Ethnicity. They report publically on representation in the top 500 for Gender, Ethnicity and Nationality.

Company I:

Reports globally on Gender although additional data on Age, Nationality and Ethnicity are held dependent on the area of operation. Data are collected at the recruitment stage and plans are in place to report on gender and age at a high level in future people surveys. Their Annual Report includes data on Gender.

Company J:

Reports globally on Gender and (in most areas of operation) Age. Other dimension data are held at local level and information is collected at the recruitment stage and via a census form. Dependent on the location, their people surveys might include Gender, Age, Nationality, Disability, Ethnicity, Sexual Orientation, Gender identity-expression, Religion/Faith and Caring Responsibilities. Some data on Gender are included in Annual Reports dependent on location.

Company K:

Reports globally on Gender, Nationality, Ethnicity and Marital/Civil Partnership Status. However data on Disability is also held in some locations. Dependent on the location, their people surveys include questions on Gender and Ethnicity. No demographic data are published publically.

Company L:

Reports globally on Gender only although data are also held on Age, Nationality and Marital/Civil Partnership Status dependent on the area of operation. Data are gathered at the recruitment stage, via a census form and through management identification (but only where errors are identified). Their people surveys include demographic questions on Gender, Age and Ethnicity. No demographic data are published publically.

APPENDIX 3: Aggregated Results For Quantitative Questions

Q1 On which of the following diversity dimensions do you report explicitly on progress globally?

	Frequency
Gender	12
Age	6
Nationality	5
Ethnicity	3
Marital/Civil Partnership Status	3
Disability	2
Caring resps	1
Sexual Orientation	0
Gender ident/exp	0
Veteran Status	0
Religion - Faith	0

Q2(a) In which of the countries listed below do you hold demographic data in your HR database on any of the diversity dimensions?

EMEA countries	Gender	Age	Nationality	Disability	Ethnicity	Sexual orientation	Gender Identity - expression	Veteran Status	Religion - Faith	Marital - Civil Partnership Status	Caring Responsibilities
UK	12	12	8	2	5	1	0	0	1	5	1
Ireland	8	8	6	0	1	0	0	0	0	2	0
France	10	10	6	3	0	0	0	0	0	2	1
Germany	11	11	7	0	1	0	0	0	0	3	0
Switzerland	9	9	7	0	1	0	0	0	0	3	0
Italy	9	9	6	1	1	0	0	0	0	2	0
Spain	9	9	6	0	1	0	0	0	0	2	0
Netherlands	8	8	5	1	1	0	0	0	0	2	0
Scandinavia	7	7	4	0	1	0	0	0	0	1	0
Poland	9	9	6	1	1	0	0	0	0	2	0
Russia	8	8	5	0	1	0	0	0	0	2	0
Israel	5	5	3	0	0	0	0	0	0	0	0

Kenya	5	5	3	0	0	0	0	0	0	1	0
Turkey	9	9	7	0	1	0	0	0	0	2	0
South Africa	8	8	5	0	2	0	0	0	0	2	0

APAC countries	Gender	Age	Nationality	Disability	Ethnicity	Sexual orientation	Gender Identity - expression	Veteran Status	Religion - Faith	Marital - Civil Partnership Status	Caring Responsibilities
India	10	10	6	0	1	0	0	0	0	2	0
China	10	10	6	0	1	0	0	0	0	2	0
Japan	10	10	6	0	1	0	0	0	0	2	0
Australia	10	10	6	1	2	0	0	0	0	2	0
Korea	6	5	4	0	0	0	0	0	0	0	0
Singapore	9	9	6	0	1	0	0	0	0	2	0
Malaysia	8	8	5	0	1	0	0	0	0	1	0
Taiwan	6	6	4	0	0	0	0	0	0	0	0

North America	Gender	Age	Nationality	Disability	Ethnicity	Sexual orientation	Gender Identity - expression	Veteran Status	Religion - Faith	Marital - Civil Partnership Status	Caring Responsibilities
USA	11	10	4	2	8	0	0	2	0	5	0
Canada	9	9	3	0	5	0	0	0	0	2	0

LatAm	Gender	Age	Nationality	Disability	Ethnicity	Sexual orientation	Gender Identity - expression	Veteran Status	Religion - Faith	Marital - Civil Partnership Status	Caring Responsibilities
Argentina	7	7	4	0	0	0	0	0	0	1	0
Brazil	8	8	4	1	1	0	0	0	0	1	0
Mexico	8	8	4	0	1	0	0	0	0	2	0

Q4 How do you gather these data

	Frequency
Employees respond to a census form	7
At the recruitment stage	11
Management identification where the data are missing	3
Other please describe	3

Q5(a) Do you hold any of this demographic data on other HR or management systems? (eg one associated with recruitments or with succession planning and high potential/talent management processes)

	Frequency
(Not answered)	1
Yes	8
No	3

Q6(a) Which of the following diversity dimensions (that are relevant) are included in the demographic questions in your global people survey?

	Frequency
Gender	12
Age	9
Nationality	5
Disability	3
Ethnicity	6
Sexual Orientation	2
Gender identity/expression	1
Veteran Status	0
Religion – Faith	2
Marital/Civil Partnership Status	1
Caring resps	3

Q7 How else do you seek to measure internal progress on different diversity dimensions?

	Gender	Age	Nationality	Disability	Ethnicity	Sexual orientation	Gender Identity - expression	Veteran Status	Religion - Faith	Marital - Civil Partnership Status	Caring Responsibilities
External benchmarking	8	2	2	3	5	4	1	0	2	1	2
Sharing with D&I colleagues	11	9	6	8	7	6	4	2	5	4	5
Reporting internal grievances	6	5	4	4	4	3	2	1	3	2	2
Employee net-work feedback	10	6	6	5	8	8	3	1	3	2	5
Qualitative feedback	10	8	5	7	7	6	3	1	4	2	3

The table above represents the data used for Graphs 1 and 2 on page 8.

The percentages shown in Graph 1 for each alternative method of measurement have been calculated by aggregating all the different demographic categories indicated for each method of measurement and dividing by a max score of 132 (that being 12 organisations x 11 demographic categories).

The percentages shown in Graph 2 represent the total number of responses for all methods by each demographic category divided by a maximum possible score of 60 (that being 12 companies x 5 different measurement options).

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