

retailTRUST[®]

IMPACT REPORT

2020

Championing the
health of retail since 1832



In its almost 200 years, has the mission of the Trust ever been more relevant than now?



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While this impact report deals with a year ending April 2020, when the COVID-19 crisis in the UK was still in its infancy, it is impossible to report on our activities without the health emergency dominating the narrative.

Our industry has been on the frontline of the pandemic both in terms of its devastating impact but also the best of the country's response. There has been so much to admire in how retailers have adapted and continued to keep stores and ecommerce operations open and serving the country. But the pressure on the health and happiness of retail's almost three million colleagues has been significant.

As we seek a path to recovery, it's increasingly clear that business has a significant role to play in how we all successfully face into some of the great health and social issues of our time. And, it is also clear from the response to our campaigning over the last six months that retailers want to look after their people's

health and wellbeing. It's our mission to provide that support. And, I am proud to say that the Trust has risen to that challenge.

For every £1 retailTRUST spent last year, we created £6.81 of social and economic value. Some 160,827 people accessed our helpline and digital self-help support, we facilitated over 7,000 counselling sessions to colleagues from over 200 organisations dealing with rising levels of anxiety, while nearly £400,000 in non-repayable grants were awarded to families struggling with the financial headwinds of the last 12 months. And, these figures will undoubtedly spike as the full extent of COVID-19's effects become clear.

This performance has allowed us to continue to deliver on our purpose to champion the health and wellbeing of retail employees and their families through emotional, physical, vocational and financial support and continue to provide pioneering residential services to former colleagues.

Meanwhile, the outstanding teams on our residential estates have reacted with great compassion and skill to continue to deliver industry-leading care to our retired colleagues in our five estates up and down the country.

As we look forward, the challenge now is to build a coalition of businesses and leaders that recognises the responsibility the industry has to look after the people that contribute to its financial success. In doing so, we will build a healthy, happy, diverse and inclusive workforce that reflects retail's position as the premier industry in the UK economy.

As society resets, our call to everyone passionate about retail is to seize this once-in-a-lifetime chance and get behind the aims of retailTRUST, protect the happiness of our colleagues and put health at the heart of how we work.

Alistair McGeorge,
Chairman, retailTRUST

OUR YEAR IN NUMBERS

160,827

people accessed our helpline and digital self-help support



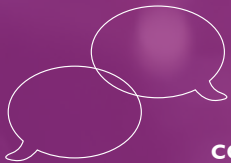
123

critical incidents supported
this year, helping
approximately 850 colleagues



£964,025

raised through donations
Thank you!



7,309

counselling sessions delivered



300 individuals attended
our pre-employment programme

£356,915

provided in non-repayable grants



£35,900

provided in scholarships and
seed funding to assist retail entrepreneurs



£825,000

of apprenticeship levy funds accessed
and reinvested into the industry

OUR MISSION

retailTRUST believes that the health of all our colleagues is a foundation of the ongoing success of British retail. Since 1832, we have been at the heart of how the retail industry cares for, protects and improves the lives of its most valuable asset – its people.

Our vision is to build a coalition of businesses and leaders that recognises the responsibility the industry has to look after the people that contribute to its financial success, and build a healthy, happy, diverse and inclusive workforce that reflects retail's position as the premier industry in the UK economy.

Today, thanks to the support the industry gives us, we help retailers look after the wellbeing of their most vital asset, their people via access to career-changing learning and development; financial, emotional and physical wellbeing services and supported-living estates.

We are for retailers and those working in retail

The Trust helps retailers large and small to prioritise their teams' wellbeing and build a healthy and happy workforce. Emotional, physical, vocational and financial wellbeing all contribute to our overall health at home and at work.

Find out more about our work at retailtrust.org.uk

I feel proud to work in the retail sector, and the support given by retailTRUST is invaluable to myself and the millions of people that work within it. Thank you once again!”

Philip Coates,
Transport Section Leader at Aldi



Because I am a manager, I recommend retailTRUST to my employees all the time. It surprised me that I would be able to get help too. It humbled me, it was fantastic the support I received.”

Karl Ferris, former Operations
Manager at BrightHouse

OUR SOCIAL AND ECONOMIC IMPACT

The Public Services (Social Value) Act 2012, requires people who commission public services to think about how they can improve the social, economic and environmental wellbeing of their local area. Before they start the procurement process, commissioners are asked to look at whether the services they are going to buy, or the way they are going to buy them, could secure these benefits.

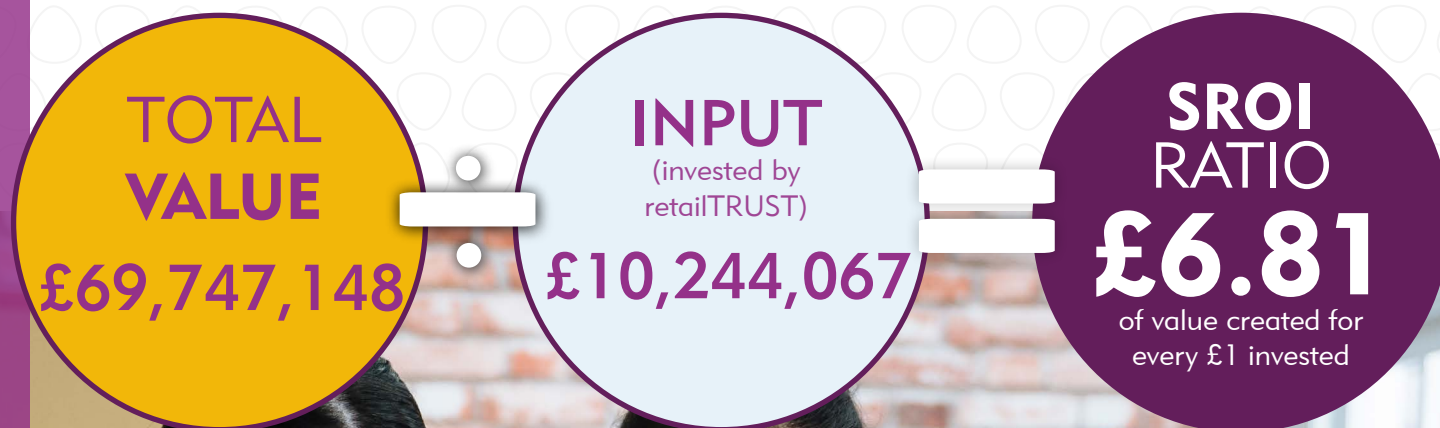
We have worked out the social return on investment (SROI) ratio by calculating the value our services offer to people and their communities, against the cost of delivering those services. We believe that this measurement provides the strongest evidence of the value for money we deliver.

The figures have been calculated by Social Profit Calculator who have used HM Treasury approved methodologies.

retailTRUST delivered over £69 million of social and economic value to individuals and local communities. The total includes savings to the NHS through improved health and wellbeing, reduced welfare benefits, and increased HMRC revenue through supporting people to find employment.

Find out more about our impact at retailtrust.org.uk/impact

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EMOTIONAL WELLNESS

Much-needed help during times of need

We offered counselling, cognitive behavioural therapy and online self-help resources to support the emotional wellbeing of retail workers and their families. An incredible 160,827 people accessed in-the-moment and digital support.

We delivered 7,309 counselling sessions and responded to 123 critical incidents to assist our wellbeing customers. Our trauma specialists helped approximately 850 individuals who had experienced such an event.

£24,280,303
of social and
economic value
created through
emotional
wellness

Improving skills and self-confidence

We supported 300 individuals through our pre-employment programme and 45% moved into employment or an entry-level apprenticeship. Through this initiative, we accessed £600,000 worth of funding via our training provider. Assisting young people to develop the right skills and experience not only helped their future prospects, but improved their self-confidence.

“Rimsha is a prime example of how a traineeship can give a young person the opportunity to ‘shine’! On first meeting her, she lacked confidence in both her abilities and career potential and wasn’t sure she would be any good working within retail – this had come from over a year of knockbacks. Each weekly visit saw her confidence and happiness increase, which was rewarding to see as a tutor.”

Catherine Ackrill, Pre-Employment Manager
at Qube Learning (our training provider)

“My experience was great! I had the chance to turn myself around. Qube Learning and retailTRUST supported me a lot by helping me to gain a job out of the work experience I did. If it wasn’t for them, I would not have been able to find a job. The programme gave me the confidence to be able to work and I am very happy about it.”

Rimsha Rizwan, General Sales Assistant at Matalan



Critical incident support following the fire at The Mall Walthamstow

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On Monday, 22 July 2019, a fire broke out at The Mall Walthamstow which hosted 66 different stores from both national and independent retailers. Over 100 firefighters spent at least four hours tackling the blaze.

Working in partnership with Capital and Regional (the Mall owners), we provided on-site critical incident support to the affected business owners and employees. Our trauma specialists were deployed to deliver counselling and emotional assistance to those in need in the immediate aftermath of the fire.

“A lot of the centre had been damaged through fire and water damage so I put a call in to retailTRUST. We’ve been supporters of retailTRUST for years. We knew the extent of the fire and the impact it would have on our staff.”

Sara Jennings, Director of Guest and Customer Experience at Capital and Regional

“The initial support I received from retailTRUST was having that counsellor there which was really good. To have someone to talk to there and then was really helpful.”

Gonul Kole,
Customer Service Specialist at The Mall Walthamstow



EMOTIONAL WELLNESS

Connected living supports mental health

Our retirement estates in London, Derby, Glasgow, Liverpool and Salford offered supported living in a community setting to 396 residents. We completed the first phase of the development of our Hugh Fraser Retirement Estate in Glasgow. Our 33 new digitally-enabled homes helped our residents to maintain their emotional wellbeing.

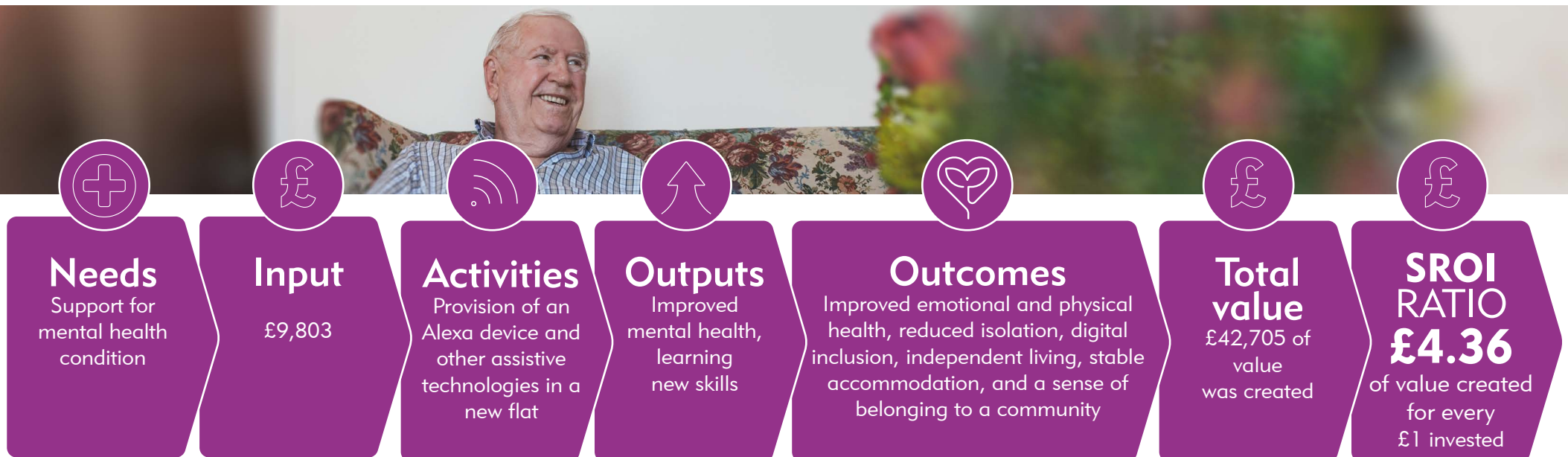
“My exact diagnosis is schizophrenia with paranoia and mood elements. My condition can be very difficult to treat and for me to cope with. My medication, though it has positive effects on all my symptoms, sometimes fails to deal with the extremes

of my condition namely extreme elation and extreme depression. There are rarely triggers for these feelings. They wax and wane for no obvious causes.

“Regarding my present home, it has had a profound effect on all of my symptoms, particularly on the depth of my depression and my paranoia. I feel safe here, something that has been rare in my life.

“I am extremely proud of my flat. Everything about it helps me feel secure. This includes the design and layout of it and the technology – mainly Alexa. While nothing can entirely alleviate the difficulty of managing my condition, security can lessen the extremes.

“I have had good periods and bad periods in my time here. I feel that it has had particularly positive effects on the depth of my periods of contentment and indeed happiness. I feel nothing but gratitude towards retailTRUST for the opportunity to enjoy my home.”



“In summary – my experience here has benefited my health profoundly. I have what feels like solid ground to walk on, something that has been rare previously in my life.”

PHYSICAL WELLNESS

Improving health through smart homes

The design and layout of our smart homes has improved the physical wellbeing of our residents.

The open-plan design allows for ease of access. Residents have the ability to use voice-activated heating and lighting which gives them greater control over their lives. Individuals have stated that they can manage better, and have more choice over the products and services to enable them to live independently.

Residents have experienced fewer accidents and hospital admissions, and have required less medical intervention since they moved to our estate.



£13,350,295
of social and
economic value
created through
physical wellness

Find out more about our impact at retailtrust.org.uk/impact

Digital innovation that changes lives

Mags lives with multiple sclerosis, scoliosis and asthma, and relies on a wheelchair to complete day-to-day tasks. In the past she has had falls and accidents while struggling to do simple tasks like reaching for light switches or her heating controls. These incidents knocked her confidence which took a huge toll on both her physical and emotional wellbeing.

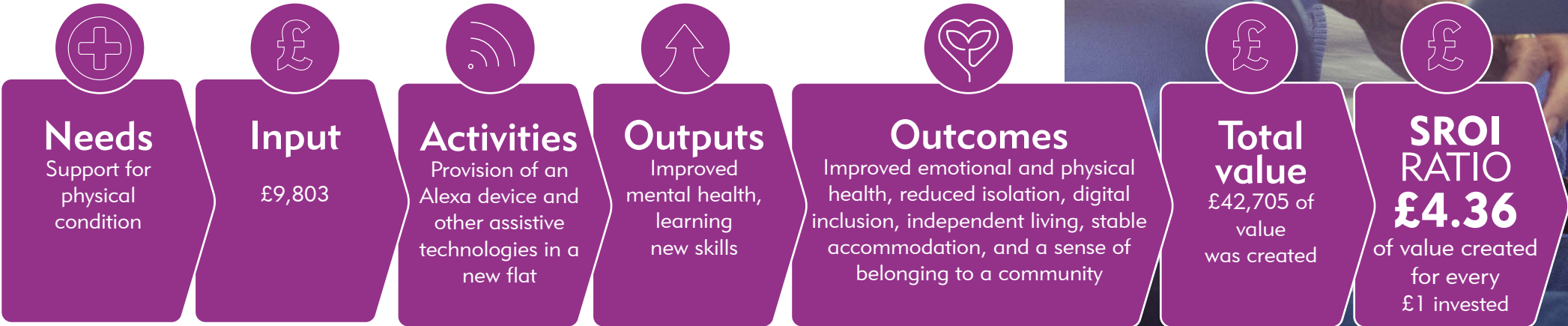
“I am not physically able to get around as I do not have the power of my legs and I require an electric wheelchair. Where I used to live I would struggle with switches and trying to turn on my lights as my hands are numb a lot of the time. I have even had to sleep with the lights on all night or the opposite and have had to fumble around in the dark if I can’t get them on.”

The flat in Don McCarthy Court is wheelchair accessible and fitted with smart home technology. This includes an Amazon Echo Show with Alexa, a smart heating system and a video doorbell.

“I was offered an Alexa, and to tell you the truth I was not that keen as I had never used this before - but boy how this has changed my life!

“I can just ask her to put my lights on and off, and my heating, which is important, as I tend to feel warm at certain parts of the day. I can video call the staff at the reception area and video call the housing support workers in their office. I can set reminders and I do not find myself disorientated with time of day anymore. I am hoping to be able to do this with my family soon as they are getting an Amazon Echo Show too. I can then see my grandchildren.

“Alexa keeps me amused and keeps my brain engaged as I always do quizzes, play my favourite music, and listen to the news – I ask her lots of things. Alexa is like having a helper or a friend. As a disabled person it really has helped give me back some control over my life. There is a lot more that she can do and I am still learning.”



PHYSICAL WELLNESS

“Since my daughter was diagnosed with a brain tumour, our life has completely changed.”

When senior sales assistant Lavinia Elena Cretul stopped working to support her family, they soon began to feel the financial strain.

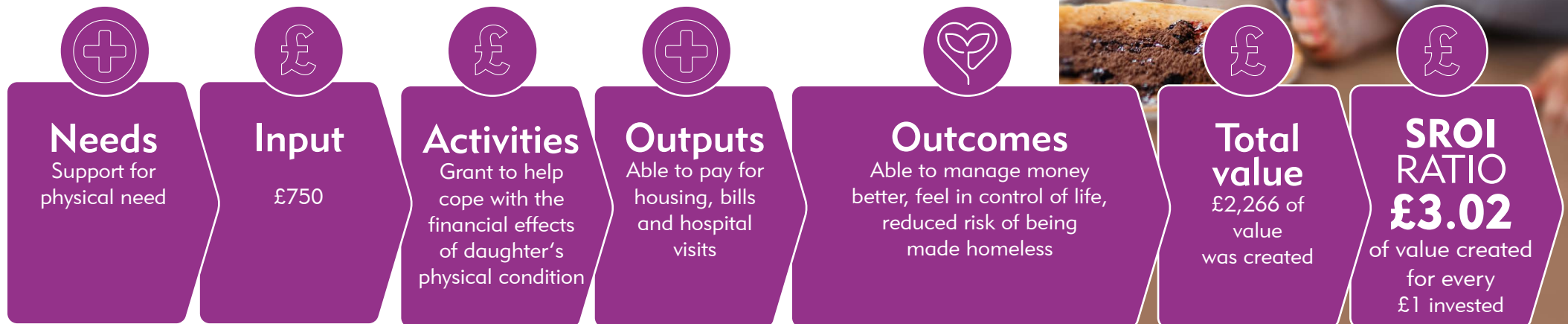
Lavinia’s three-year-old daughter Maya was diagnosed with a brain tumour. Lavinia and her family were coping with increased hospital visits as well as the financial worries of not working.

“As soon as Maya was diagnosed, I stopped working. And soon we started to have financial difficulties on top of everything else that was going on with my daughter. Maya will be given 18 months of chemotherapy treatment.

“This is going to be the most difficult time for her and for us as she is only three years old and the treatment will be strong.

“I learned about retailTRUST from my store manager. This is the first time I’ve asked for help and to be honest I wasn’t expecting to get financial help so quickly especially during this pandemic. At this point we started to worry about rent, bills and the amount of trips that we make to the hospital. This grant will be used to pay for petrol and food for my daughter as she is struggling with side effects from the chemotherapy.

“I would recommend retailTRUST to any of my colleagues that are going through a difficult time in life because, for me, it will make all the difference.”



“I would recommend retailTRUST to any of my colleagues that are going through a difficult time in life because, for me, it will make a difference.”



VOCATIONAL WELLNESS

We helped individuals get into work, progress their careers, access resources and develop new skills.

Developing the knowledge and digital skills of our residents

We surveyed residents at our Hugh Fraser Retirement Estate and 80% stated that they have been able to learn new skills through the smart homes initiative. They commented that their quality of life has improved as their abilities have increased through the use of digital technology.

“I feel I have made the best decision ever coming to the estate and it’s a big thumbs up for me. I would recommend this estate to anyone who is looking for somewhere that is beautiful, staff at hand and you learn new things every day through the digital world.”

Mags, resident at our Hugh Fraser Retirement Estate

Find out more about our impact at retailtrust.org.uk/impact



£6,305,892
of social and
economic value
created through
vocational wellness

Creating the next generation of retail leaders

150 retail colleagues completed the first year of the Retail Leader Apprenticeship Degree, which was the first initiative of its kind for the sector. Employers accessed £825,000 worth of apprenticeship levy funds from this programme.

“I chose this degree because it has helped open up loads of opportunities in my career. I have learned so much in regards to the business and how it works. I am also learning so much more about myself and what I am capable of. I am enhancing so many skills that I never even knew I had, whether that be management skills, or general people management. I feel extremely lucky to be in the position I am in and I would recommend it to anyone who has an interest in retail management!”

Rowan Chaplin,
Retail Management Apprentice
at Dixons Carphone

“Before starting this apprenticeship degree, I felt like I was constantly struggling in a job that I didn't feel like I was going anywhere in. This apprenticeship has not only been beneficial to my career development but also my personal development too. I couldn't ask for a better opportunity to finally break the loop of feeling worthless.”

James Rudge,
Retail Management Apprentice
at Dixons Carphone



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“When I first joined the company, I had no self-confidence, now I am able to lead teams into top three in the region.”

Find out more about our impact at retailtrust.org.uk/impact

VOCATIONAL WELLNESS

Mentoring that enables career progression

Our elevator mentoring programme supported 20 mentees. The 12 mentors contributed 120 hours to help senior retail managers navigate their careers.

12

mentors



20

mentees



120

hours



Jual Ahmed has been working in retail since the age of 17 and we have assisted him throughout his career.

In 2018, Jual was awarded a full scholarship to attend Oxford Summer School and in 2019, he was accepted onto the elevator mentoring programme. Jual had the opportunity to be coached by Liz Evans, chief executive of FatFace. The mentoring enabled him to progress his career and secure a new role as franchise manager at Debenhams.

Find out more about our impact at retailtrust.org.uk/impact



I came across the elevator mentoring programme on LinkedIn. The thing that appealed the most was to be coached by a senior level executive. I chose Liz to be my mentor because her experience was one I could personally relate to. She is a great role model, very well respected and known within the industry. It is by networking within her circle that I managed to land my new role as franchise manager at Debenhams.”

FINANCIAL WELLNESS

We provided £356,915 worth of non-repayable grants to help vulnerable colleagues remain in their own homes, feed their families or make essential hospital visits.

£16,993,795
of social and economic value created through financial wellness

Improving career prospects through educational grants

We also offered £60,000 worth of educational grants to assist 24 retail employees and their families with training needs or university costs.

“I am currently studying a business management degree through The Open University, a qualification once completed will provide many future career opportunities with my current employer Aldi Stores Ltd.

“While the degree itself is a hugely rewarding course for me personally, it is also a massive financial commitment. I became aware of the possibility of a retailTRUST grant to help me with the cost of this through another colleague and I was extremely fortunate enough to be accepted.

“I have just completed my study for this year and despite the uncertain times we currently find ourselves in, my study was a success and I gained a distinction for the year. The materials I have studied in the past year have proved to be hugely beneficial for my current day-to-day responsibilities at work and will no doubt stay with me as I progress in my career with Aldi.

“I cannot express how much I appreciated the grant, and the success of my studies in the past year are largely because of the financial support I received from retailTRUST – allowing me to concentrate fully on my studies.

“Thank you once again!”

Philip Coates,
Transport Section Leader, Aldi



I feel proud to work in the retail sector, and the support given by retailTRUST is invaluable to myself and the millions of people that work within it.”

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FINANCIAL WELLNESS

A woman with blonde hair, wearing a bright pink blazer over a white t-shirt with a graphic, stands in front of a black backdrop. The backdrop features the text 'pplrstrange.CO.UK' and 'RANGE' in white. There are also social media icons for Instagram and Facebook at the bottom. A large quote is overlaid on the image.

“Your advice and belief in me and my concept was the stepping stone I needed to make my dream a reality.”

Helping the next generation of entrepreneurs

Working in partnership with Glasgow Caledonian University (GCU) and Hammerson, we provided £35,900 in the form of scholarships and seed funding to help 15 retail entrepreneurs.

“I got into fashion because it is creative and exciting. But, starting out on your own is scary, particularly in retail. I feel lucky to have had the support from retailTRUST, Hammerson and GCU. I wouldn’t be where I am today if it wasn’t for you. I’ve always been motivated and hardworking but your funding, advice and belief in me and my concept was the stepping stone I needed to make my dream a reality. I honestly can’t thank you enough. Knowing that retailTRUST, thanks to the support of the sector itself, is giving young start-ups like me a helping hand is unbelievable and it is a very special programme. I am proud and honoured to be part of it.”

Emma Russell, Founder of pplrstrange

Supporting businesses and families affected by the fire at The Mall Walthamstow

Working closely with Capital and Regional, and Waltham Forest Council, we launched an appeal to support the longer term needs of those businesses and employees who would face hardship as a result of the fire. A magnificent £66,000 was raised to assist colleagues with financial and emotional needs.

“Thank you for your support.
I will rest much better now
that I know I can keep a
roof over my three boys
and feed them.”

Beneficiary who was affected by the fire at
The Mall Walthamstow

Find out more about our impact at retailtrust.org.uk/impact

SUPPORT DURING UNPRECEDENTED TIMES

Offering a lifeline to retail's frontline

The COVID-19 pandemic brought significant challenges for our sector. To support the wellbeing of frontline retail workers, we launched an appeal in partnership with RWRC (the home of Retail Week and World Retail Congress) and the British Retail Consortium.

The fundraising campaign, 'CaRe20 – Caring for Retail during COVID-19', aimed to provide the emotional, physical, vocational and financial support that would desperately be needed by retail workers and their families who may be ineligible for government assistance during the health emergency.

A number of businesses supported the campaign in its initial weeks, including the John Lewis Partnership, TJX Europe, Pets at Home, and IMRG.

“TK Maxx and HomeSense have long partnered with the amazing retailTRUST and used the essential services they provide for our UK employee assistance programme.

“Our thoughts now turn to people around the world who have been affected by the COVID-19 outbreak and so, in this time of unprecedented need, we are very pleased to be able to give additional support to this dedicated fund, CaRe20, which will provide critical help to the most vulnerable across our industry.”

Louise Greenlees, President at TJX Europe

By the end of April 2020, the appeal had raised a staggering £316,326. The funds are being used to provide much-needed assistance to colleagues in need.

We awarded 187 grants from the start of lockdown to the end of April 2020.

Find out more about our impact at retailtrust.org.uk/impact



Coping with the emotional, physical and financial effects of COVID-19

When Eric received a positive COVID-19 test, it not only put his health at risk, but also his home. Eric works as a customer service manager at B&M. Eric's diabetes, along with the positive COVID-19 diagnosis, meant that he was seriously unwell and unable to work.

To protect the community and his family, Eric had to self-isolate. This put him under huge emotional and financial strain.

As Eric lives with bipolar disorder, the virus significantly affected his physical and mental health. Isolation reduces the risk of infection to others, but it can have a detrimental effect on our emotional wellbeing.

This, coupled with recovery and the stress of a reduced income, meant that Eric needed support to cope with everyday living.

When a B&M colleague suggested Eric contacted retailTRUST, he was struggling to pay his rent and some of his essential bills. Eric was awarded a non-repayable grant from the CaRe20 fund to help him maintain his rent payments, and secure his home. This eased some of the financial and emotional stress, allowing him to fully recover.

“Without you I would have had so many problems.”



Needs

Support with financial need



Input

£300



Activities

Grant to help cope with the financial impact of COVID-19



Outputs

Able to pay for housing



Outcomes

Able to manage money better, feel in control of life and reduced risk of being made homeless



Total value

£850 of value was created

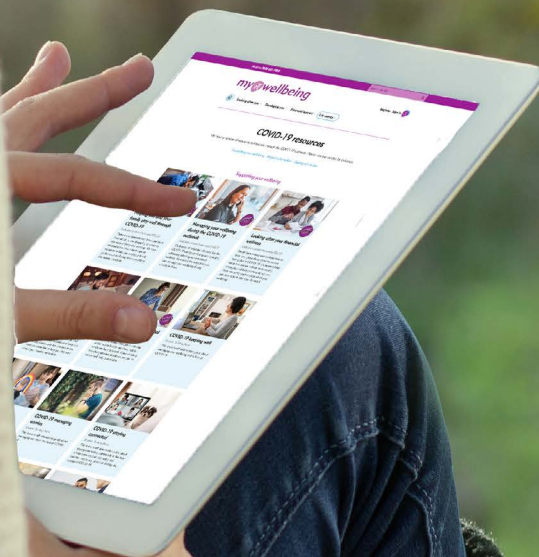


SROI RATIO £2.83

of value created for every £1 invested

SUPPORT DURING UNPRECEDENTED TIMES

“Easy to navigate, it is a great resource to help signpost where they may get the professional support, if needed.”



Find out more about our impact at
retailtrust.org.uk/impact

Meeting wellbeing needs through personalised digital support

As a direct response to the crisis, we created a dedicated area on our wellbeing site to support affected retail colleagues. The content addressed a range of issues focusing on the emotional, physical, vocational and financial aspects which COVID-19 and the associated lockdown created.

From working at home and managing teams remotely, through to looking after your family and maintaining your physical wellness, we created over 40 pieces of content to offer help and preventative support. Some of the articles and videos were produced in partnership with organisations who wanted to assist our efforts. We would like to thank DeltaV Partners, Pets at Home, OC&C Strategy Consultants, and the British Retail Consortium for their assistance.

We have been overwhelmed by how our retail customers and beneficiaries have engaged with the content. An incredible 53,923 users accessed the wellbeing site in March and April 2020, and we received 132,320 page views in those two months alone. This is a 122% increase in users and 81% increase in page views when compared to January and February 2020.

“The wellbeing site is a fantastic tool to help any line manager who suspects a colleague or team member’s wellbeing is affected. And once registered, the colleague can access the site and any of the self-help material confidentially.”

Tim Beer, Retail HR Business Partner at Matalan

Protecting our residents during the health emergency

As restrictions were introduced across the country, our estates were already in a state of lockdown to keep our residents and colleagues safe and well.

We introduced foodbanks and redeployed employees to ensure that residents were able to access essential supplies, including medication. A team of helpers also delivered lunchtime meals from restaurants on our estates.

“I think it has all been handled very well with residents, staff and carers protected as well as they could by providing a safe environment for us all – thank you!”

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“Many thanks to the wonderful staff and support team who have been there for us all from the very start.”

“Thank you for keeping us safe!”



CHAMPIONING THE HEALTH OF RETAIL



“To win the marketplace you must first win the workplace.”

Ever since our founder Thomas Helps held court in a coffee shop in London in 1832 and announced his desire to “promote the happiness and interests” of those working in our trade, retailTRUST has continuously innovated to ensure it cares for, protects and improves the lives of those that make up this most human of industries.

It’s a vision that I am pleased to say has gained in traction in recent years as the link between the health of a company’s employees, their happiness and its financial performance have become proven to be intertwined.

As the great American businessman and CEO of Campbell Soup Company Doug Conant once said: “To win the marketplace you must first win the workplace.”

This year, in light of the COVID-19 crisis and the impact this has had on the industry, placed into the context of the fight for survival many companies in the sector are engaged in, that sentiment and the work of the Trust has never been more relevant.

The future health of retail runs in parallel to the health of its workforce.

Let’s be under no illusions to the challenges that face retail colleagues working through these tough times. Financial instability, uncertainty, constant change and social disconnection has made everyday life ever more challenging.

But, let’s also be clear of the huge opportunity too for positive action and the momentum that’s building to create generational defining change. The world is waiting for us to respond.

We at retailTRUST are responding by pledging to be the catalyst for that change, the centre of the ecosystem that debates and builds best practice and the trusted provider of the tools the industry needs to build this future.

But, we can’t do it without your help.

Those companies who partner with us to ensure their teams have access to our industry leading services are helping us develop pioneering ways to reach those in need and the development of our digital wellbeing services have enabled us to serve an incredible 115,706 individuals this year.

Meanwhile, the generosity of those companies and individuals who have raised a magnificent £964,025 have provided much-needed financial support and helped retail employees to improve their career prospects.

With your help, we have been able to transform our estates to enable residents to stay connected to their loved ones during these uncertain times. We have tackled issues like social mobility and youth unemployment through our apprenticeships and pre-employment programme.

We have also been involved in the creation of two new standards (the Level 4 and Level 6 Assistant Buyer and Merchandiser Apprenticeships) because we recognise the importance of having apprenticeship programmes to plug the youth unemployment gap that has been a result of the pandemic.

In 1832 our founders were pioneers in how the industry collectively looked to promote the health of those it employed. With your support, we have continued to lead the way, ensuring as many people as possible have access to the help they need when they need it. As the true scale of the impact of COVID-19 on retail becomes clear, that ongoing partnership between the industry and retailTRUST will be critical in ensuring the ongoing health of retail's three million colleagues and the ongoing success of the industry.

**Together we can champion
the health of retail.**

Thank you.

Chris Brook-Carter
Chief Executive, retailTRUST

Together we can champion
the health of retail.

But, we can't do it
without your help.

retailtrust.org.uk/impact