



Accelerating Diversity in the Irish Food and Drink Sector

2020

The Agrifood Diversity and Inclusion Forum's Pulse Survey

About the AgriFood Diversity & Inclusion Forum (AgDif)

The Agri-Food Diversity & Inclusion Forum (AgDif) is a collaborative initiative with industry, led by Bord Bia and Aon, and in partnership with The 30% Club to drive gender diversity.

Our vision is that the Irish food and drink industry is the sector of choice for the brightest and best talent.

Our purpose is to advance the Diversity & Inclusion (D&I) agenda within the Irish Food and Drink industry, with an initial focus on gender diversity.

In line with Origin Green, we drive awareness and support for the Irish food and drink industry on its D&I journey, so it is best positioned to compete to attract the best talent at all levels and across all fields of discipline.

Introduction

In 2018, Bord Bia and Aon carried out research to measure existing diversity and inclusion metrics across the industry¹, and to understand current challenges for women.

The 2020 Agri-Food Diversity & Inclusion Forum (AgDif) Pulse Survey expands on this 2018 research. The 2020 Pulse Survey is a check-in with industry to measure awareness and progress within the sector by capturing key D&I metrics 18 months after the initial research.

While we are acutely aware that the Covid-19 pandemic has created a changed and more challenging economic environment from when this research was originally conducted, there are salient insights that still bare true. We believe that these insights will ultimately help lead the Irish food and drink industry on a road to recovery through innovation and diversity of thought and leadership.

It compares the views of both employees and business leaders, showing important differences in perceptions and attitudes.

The 2018 research indicated that diversity and inclusion was a strong focus for CEOs. In 2020 this continues, although it is clear that there is still much to do. This Pulse Survey provides a useful snapshot of D&I activity in the Irish food and drink sector, and offers an insight into the additional actions business leaders should be taking.

Building a diverse and inclusive company means that firms can draw from across the talent pool, attracting the skilled employees they need, supported by a strong employee brand and recruitment proposition. Attracting and retaining female employees is key to that; business leaders need to identify what female employees want; identify any gaps between demand and what the organisation can currently offer; and work towards closing them if they want to fulfill their talent requirements.

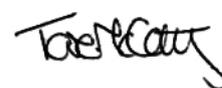
At the time the survey was issued, Ireland was at full employment. Today's context is different due to the disruption caused by COVID-19. However, the evidence suggests that the incentive is as strong as ever for organisations to improve their performance when it comes to diversity and inclusion.

Conclusion

Business Leaders should assess their current skills base and identify ways that improved approaches to D&I will help them to meet their emerging talent needs. Diverse input and new ways of thinking are essential in helping the industry to progress: proactive D&I strategies will help firms to achieve this diversity of thought and approach. With the difficult economic challenges Covid-19 poses, business leaders will need to balance their short term needs with a longer term vision of how diversity can contribute to strengthening the resilience of their business.



Ciara Jackson
EMEA Food & Drink
Industry Leader
Aon



Tara McCarthy
CEO
Bord Bia

¹ Diversity & Inclusion in the Irish Food and Drinks Sector:
Women in business (September 2018)



Key Takeaways

85% of business leaders state that attracting, retaining and developing talent either somewhat or significantly impacts their growth prospects.

Flexibility still matters most to employees. Making flexibility work for your organisation can be a key recruitment win and employers should explore options that make sense for them.

There is a disconnect between business leaders and employees on the importance of the D&I agenda:

- 84% of business leaders state that gender equality and D&I are priorities for their organisation, yet only 63% of employees believe this is true where they work.
- 20% of employees believe that gender equality and D&I seem like ‘a box to be ticked’ by organisations.

Industry leaders should know;

- There remains a risk that the talent gap will not be closed, adversely affecting the reputation and sustainability of the sector. The AgDif Pulse Insight 2020 offers insight into the views of key talent working in the sector and lessons for organisations to consider.
- Employees in the Irish food and drink sector believe that the most attractive aspects of the industry are the sector growth and the presence of strong brands. These insights can be used by organisations to develop an employer brand which is attractive to talent, for example ‘a sustainable, home grown business that feeds the world’.

More information available at: bordbia.ie/agdif/

Acknowledgements

Bord Bia and Aon would like to thank the Chairpersons of the Forum’s Advisory Group, Alastair Blair (Accenture) and Taskforce, Caroline Littleton (Kerry Group) and David O’Flynn (Dawn Meats) for leading these groups in 2019. We welcome Michelle Walshe (Ribworld) and Tom Tully (Bord Bia) as co-chairs of the Taskforce in 2020. We would also like to acknowledge the support, dedication and hard work of all the members of the Advisory Group and the Taskforce. Special thanks is also reserved for The 30% Club for its ongoing support of the Forum and for sharing its insight and expertise. Finally, thank you to the respondents to the survey both this year and in 2018, whose insight and generous input make this project possible and worthwhile.

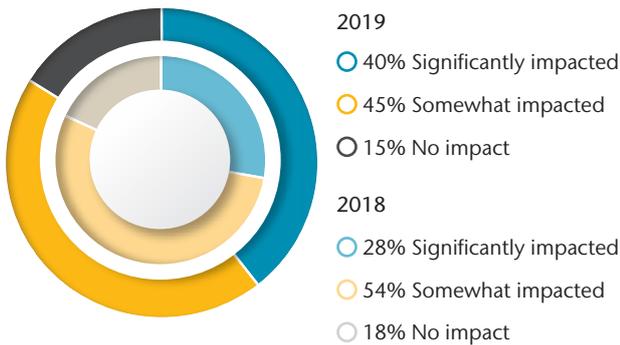
	Advisory Group	Taskforce
Accenture (Chair)	●	
Aon	●	●
Arthur Cox (The 30% Club)	●	
Aryzta	●	
Bord Bia	●	●
Ceres		●
Dawn Meats	●	●
Department of Agriculture, Food and the Marine	●	●
East Coast Bakehouse	●	
Errigal Bay	●	●
Glanbia	●	●
Greencore	●	●
IBEC		●
Irish Distillers	●	
Keelings	●	●
Kepak	●	
Kerry Group	●	●
Oliver Carty		●
Ornua	●	●
Ribworld	●	●
The 30% Club	●	●

Survey Insights: Attracting Talent

Employers were asked about their organisation's approach to attracting, nurturing and retaining talent.

Ability to Grow

Business leaders - To what extent is your ability to grow your business hindered by your challenges in attracting, retaining and developing your people?



- Through the business leaders' lens, the scarcity of talent is a clear issue: 40% believe their ability to grow their business is significantly impacted by their challenges in attracting, retaining and developing talent.

Recruitment Challenges

- The biggest challenge when recruiting new employees is competition from other sectors, a change from 2018 when 'salary' was the biggest challenge, which may be indicative of the fact that employees are very much in the driving seat when it comes to choosing where to work.
- Competition within the sector and a scarcity of suitable applicants and skills are also key challenges for Irish agri-food employers.
- Organisations with a dedicated HR function have a clear view of the factors most challenging their recruitment goals, stating that competition from other sectors and lack of qualified applicants are their biggest issues. Those without a dedicated HR function state a variety of reasons with no single factor identified as the primary barrier.

What are the key recruitment challenges to your business?

Participants could choose more than one response.



Differentiating the Irish Food & Drink Sector

When asked what makes working in the Irish food and drinks sector attractive, employees top answers were;

- Company brand / reputation
- It's a growth industry
- It offers the opportunity to use their qualifications

Attractiveness of working in the Irish food and drink sector

Participants could choose more than one response.



Key Takeaways

- 85% of business leaders believe difficulties in talent acquisition and retention are a risk to their business growth
- Competition from other sectors, within the sector and a lack of suitable applicants drive the talent shortage according to both business leaders and employees.

AgDif Insight

Although employers see recruitment of talent as a struggle, in fact employees are telling them exactly what they want by way of support, as we see later in the survey. If employers can deliver on these areas, employers should see their talent attraction and retention become easier.

Implementing measures to improve the attractiveness of an organisation seems like a quick win for employers, as the talent pool is open about the D&I initiatives which would be a draw. Yet there is a danger that employers are simply paying lip service to D&I and failing to deliver on tangible measures that employees value; initiatives like flexible working. In some cases, the image presented by companies is not matched by the reality of D&I in practice and this may be one of the reasons they experience difficulty in attracting top talent.

Diversity & Inclusion Maturity and Business Priority

Diversity & Inclusion Maturity

How Employees view D&I Maturity

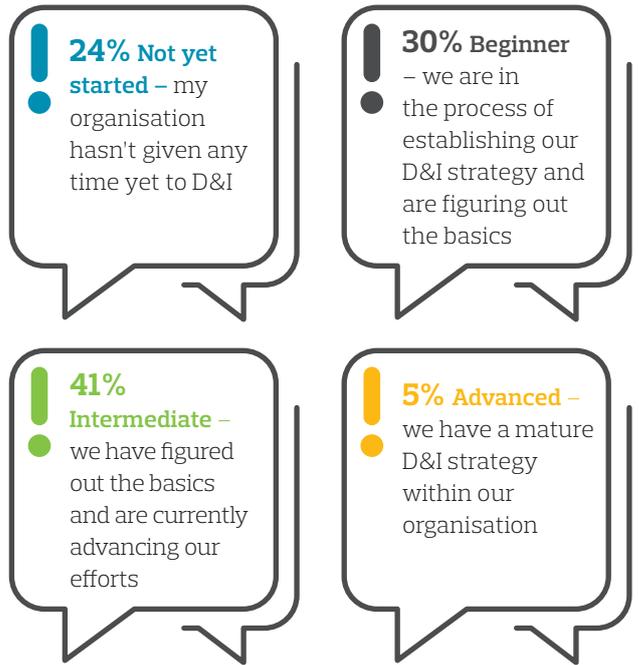
When asked where their organisation is on the D&I maturity spectrum employees identified the organisation where they work as follows.

- 15%** believe their employer has not started work on a D&I strategy. This figure is higher than in the 2018 survey (10%).
- 39%** of employees chose the ‘beginner’ phase; employer is in the process of establishing a strategy and figuring out the basics.
- 33%** of employees chose the ‘intermediate’ phase; employer has figured out the basics and is currently advancing efforts.
- 13%** of employees chose the ‘advanced’ phase; employer has a mature strategy in place.

Again there is evidence of a perception gap, with 13% experiencing an advanced D&I strategy where they work, yet only 5% of Business Leaders share this view.

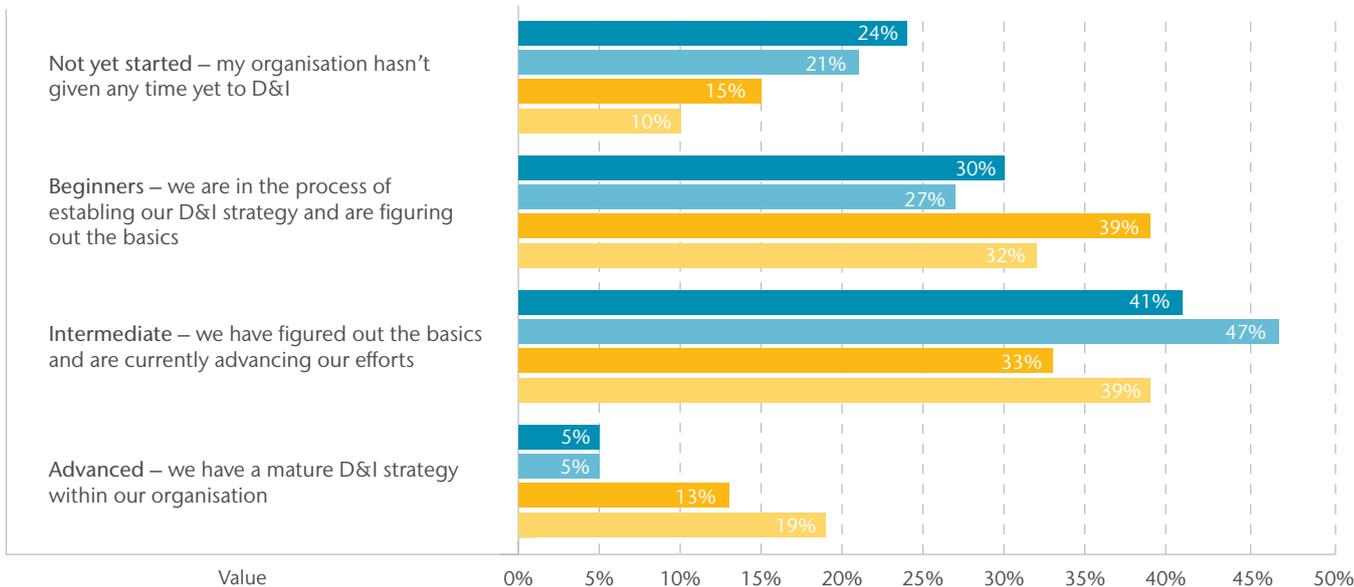
The data suggests regression in D&I maturity when compared to 2018 results, this may be a result of the different mix of respondents. Or potentially, that expectations are higher of D&I initiatives as both employers and employees are more aware of good practices in this area.

How Business Leaders view D&I Maturity



Which one of the following statements best describes where your organisation is on the D&I maturity spectrum?

● Business leaders ● Business leaders 2018 results ● Employee ● Employee 2018 results

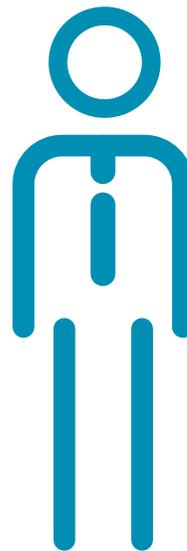


Diversity & Inclusion as a business priority

Business leaders and employees were asked if gender equality and Diversity & Inclusion are priorities in the organisation in which they work. Their responses reveal stark differences in the business leaders and employee experience.



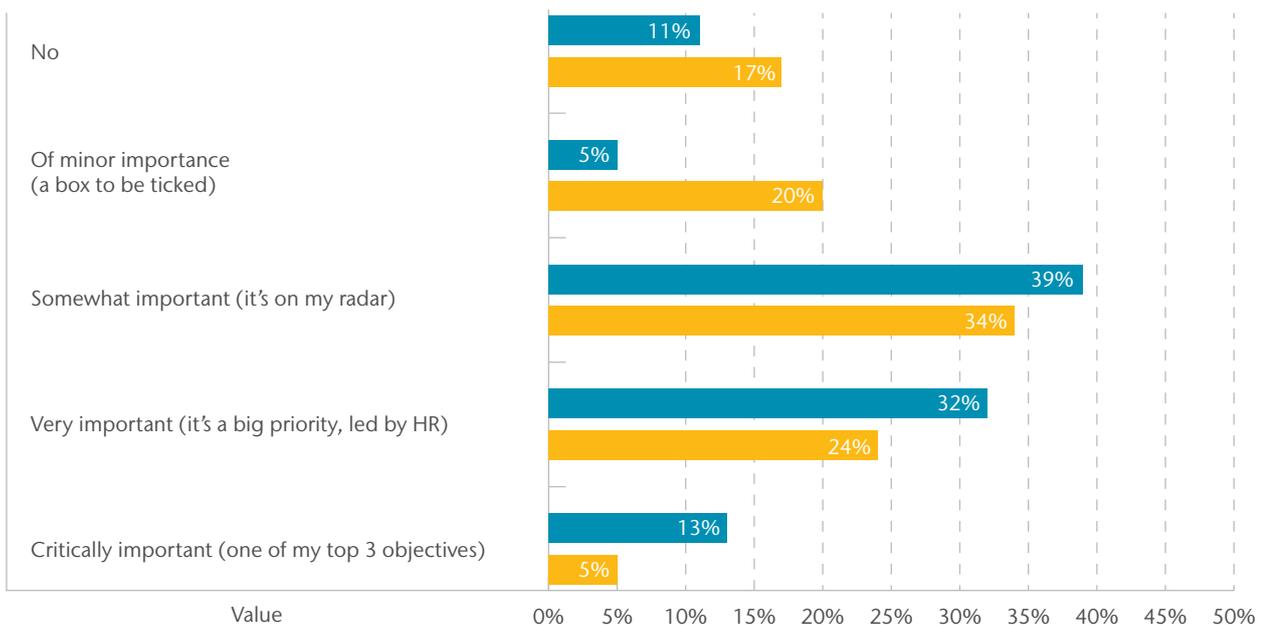
29% of employees believe that D&I is critically or very important to their organisation, while **34%** think it is somewhat important. **37%** believe it is of minor importance or not a priority at all.



In contrast, **45%** of business leaders think diversity and inclusion is a high priority (critically or very important) within the organisation. **16%** say it is of minor or no importance.

Is gender equality and diversity a priority for your organisation?

● Business leaders ● Employee



D&I in Action

Employees were asked a series of questions about their understanding and experiences of D&I initiatives within their organisation. Business responses reveal that there is a significant disconnect between the employee experience and the business leader view:



86% of Business Leaders believe progress has been made in attracting, retaining and progressing women to senior management. Employees fundamentally disagree, with only **65%** believing that progress has been made.



66% of employees can work from home when feasible, yet Business Leaders call out that **78%** offer working from home.



58% have access to virtual technology to reduce commuting and long-distance travel, yet **67%** of Business Leaders believe this to be the case.



Two thirds (**67%**) of leadership versus over half (**52%**) of employees who participated in the research say that employees have never been asked to change appearance to conform to company culture.



25% of respondents from leadership think the organisation has a dedicated budget to support D&I activity, yet **34%** of employees believe this to be the case.



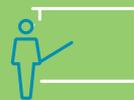
25% of those working in the sector believe that the organisation clearly states gender pay gap goals and ambitions, yet leadership places this metric at **33%**.

D&I Policies in the Irish Food & Drinks Sector

Employees were also asked about measures in place to support diversity and inclusion at their organisation:



A health and wellness agenda is the most commonly offered measure (**86%** say their employer offers this, for all or some employees).



Leadership development programmes or skills training are provided by **85%** of employers, with **79%** of firms offering graduate specific programmes.



Flexibility of working hours for start/finish time is offered to all/some by **79%** of employers.



Part-time working is offered to **76%**, while job share or working from home is offered by **72%**.



Least likely to be offered are LGBTQ networks (offered by just **12%**) and parent and carer networks (offered by **17%**).

Business Leaders stated that:



96% offer flexible (part-time) working and **83%** offer flexibility around start/finish times. **80%** offer job share or working from home options.



86% provide leadership development programmes or skills training.



77% provide corporate social responsibility initiatives.



77% offer mentoring.



74% have a health and wellness agenda.

Employers have a more positive view of the practical D&I steps that have been taken than employees, who feel fewer D&I supports are being offered than industry employers report.

Many of the measures employees are looking for have already been taken by industry leaders but the research tells us that employers are not communicating their D&I efforts effectively, potentially at a cost to their reputation and employer brand.

Do you believe that these factors are true of your organisation?

	Yes	
	Business leaders	Employee
There is a dedicated budget in place to support D&I activity	25%	34%
A diversity target/goal is shared outside the organisation	25%	31%
The organisation clearly states gender pay gap goals and ambitions	33%	25%
Progress has been made in attracting, retaining and progressing women to senior management	86%	65%
The company has a women's network open only to women	14%	10%
The company has a women's network that is open to both women and men	20%	15%
Men are encouraged to take parental leave	47%	53%
Employees have never been asked to change appearance to conform to company culture	67%	52%
Employees have access to virtual technology to reduce commuting and long-distance travel	67%	58%
Employees have the facility to work from home where their role can facilitate it	78%	66%

AgDif Insight

When it comes to Diversity & Inclusion, we see continued discrepancy between the business leaders and employee views. There is a clear mismatch between employer and employee perceptions of the organisation's approach to D&I. The business leaders claim it is a far higher priority than employees believe they are experiencing.

On the other hand, employees are more likely than their business leader counterparts to be of the view that there is a D&I budget, that there is a D&I strategy at all, and that it is reasonably advanced in their organisation.

Although as a strategic approach, employers say they are struggling when it comes to D&I, in terms of practical measures, many already have quite a number of initiatives in place, but the survey results suggest that these are not being promoted effectively.

Business leaders are more aware than employees of many of the initiatives and approaches the firm undertakes. Employers think that working from home is more prevalent than employees do, for instance.

There is a 20% gap between the employee and employer view on whether progress has been made in attracting, retaining and progressing women to senior management – 86% of business leaders believe this is the case, but only 66% of employees.

Sometimes these differences are a result of perception, demonstrating a business leaders approach that has failed to convey itself to employees. While senior leaders may feel they are tackling an issue, the reality 'on the ground' can look very different.

In areas where this discrepancy exists, employers need to clearly communicate their D&I strategies to ensure that employees are aware of and value their efforts.

There is a clear call from employees for pragmatic steps to tackle D&I issues. Organisations may be best advised to also review their flexible working and other policies and work to ensure they are universally available across role levels and locations. The good news is that employers can take many of these steps relatively easily and quickly, rapidly advancing their D&I efforts.

The Agri-Food Diversity & Inclusion Forum has created a D&I toolkit for the industry, and is also supporting businesses to understand best practice in D&I through the Masterclass series.

More information available at: bordbia.ie/agdif



AgDif – The Agri-Food Diversity and Inclusion Forum

The Agri-Food Diversity & Inclusion Forum was established in 2017, as a collaborative initiative with industry, led by Bord Bia and Aon. The objective is to position the Irish food and drinks sector as the industry of choice for Ireland’s best talent at all levels and across all fields of discipline.

AgDif focuses on the business case for D&I. Its basic hypothesis is that a mix of experience, background, capability and perspectives at all levels of an organisation drives better business results (and this fact is supported by a myriad of research). The current priority is to develop a framework to promote D&I in the Irish Food, Agribusiness and Drinks sector, with an initial focus on gender balance, in partnership with The 30% Club, throughout 2017-2020.

As the Irish employment landscape evolves, the Food and Drink sector must compete for people with relevant skillsets. AgDif works to secure the future success of the Irish food and drinks sector by recognising the need to attract and retain the best talent, and the group recognises that this is dependant on an inclusive and diverse culture.

Advisory Group

This group is composed of selected CEO, Managing Director and Senior Leadership participants of Irish food and drink companies and relevant bodies. The Advisory Group is responsible for developing the strategic direction of the initiative, including the management and coordination of the activities of the Taskforce. A core objective of this group is to guide the development of a work programme, including the development of a practical Toolkit of D&I activities for implementation by companies in the sector. The Advisory Group is chaired by Alastair Blair, Country Managing Director, Accenture Ireland, and a prominent D&I advocate.

Taskforce

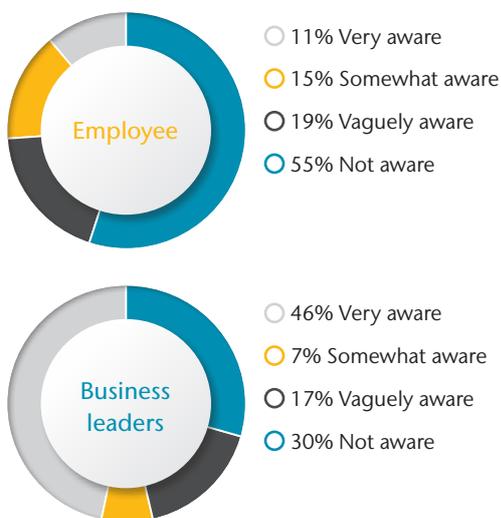
This group is made up of a wider group of senior company representatives of food and drinks manufacturers representing an array of responsibilities in their respective companies including sales, finance, business development, legal, sustainability and HR. The Taskforce is responsible for implementing the strategy designed by the Advisory Group. The Taskforce is responsible for advancing the work of the initiative, and shall develop an adequate evidence base and prepare positions, strategies and actions to be submitted to the Advisory Group for decision. The 2019 Taskforce was co-chaired by Caroline Littleton (Kerry Group) and David O’Flynn (Dawn Meats). The 2020 Taskforce co-chairs are Michelle Walshe (Ribworld) and Tom Tully (Bord Bia).

Awareness of the Agri-Food Diversity & Inclusion Forum

Respondents were asked about their awareness of the AgDif D&I Forum. While the business leaders response was encouraging it is clear that the group has more work to do in promoting itself to those in the Irish Food and Drink industry throughout 2020 and beyond.

Awareness of AgDif overall

How aware are you of the Agrifood D&I Forum (AgDif)?

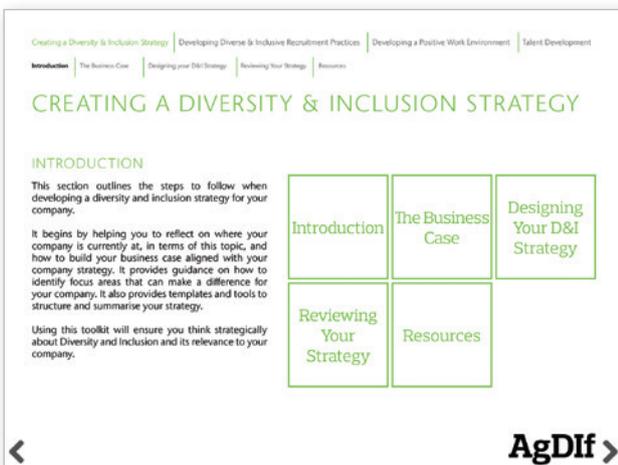


Supporting Industry with the AgDif Toolkit

This Toolkit provides guidance on building the business case for your diversity & inclusion strategy and help in defining your measures of success. It offers advice on how to implement diversity & inclusion considerations into recruitment processes covering topics such as:

- Achieving a balanced slate of candidates
- Writing a gender-neutral role profile
- Interview techniques
- Ensuring a balanced interviewing panel

The Toolkit serves as a handbook to guide your thinking on talent development in all its guises: mentoring, coaching, training and creating the right conditions in your work environment to foster and nurture diversity & inclusion.



The Toolkit is aligned to the Origin Green Charter and freely available for all companies in the sector, and it is split into 4 themes:

1. Creating a diversity & inclusion strategy
2. Developing diverse and inclusive recruitment practices
3. Developing a positive work environment
4. Talent development

Each theme includes a description of the topic, business case, resources, thought leadership and case studies, as well as practical templates and structures that companies can use.

More information available at: bordbia.ie/agdif

Use of AgDif Diversity & Inclusion Toolkit

Have you used the free online Toolkit from AgDif?



The AgDif Masterclass Series

Informed by the research findings, the aim of the Masterclass series is to equip companies with the knowledge and know-how to implement (D&I) initiatives in the workplace to attract and retain the best talent for our industry.

In 2019, 3 Masterclasses took place:

1. How to grow your talent pool – hosted by Bord Bia
2. Creating a culture of flexible working – hosted by Aon
3. Overcoming recruitment challenges – hosted by Kerry Group

The Masterclass series will continue in 2020, with topics based on the insights from this pulse survey.

For more information, www.bordbia.ie/agdif. The forum welcomes input on D&I topics, and is open to new members from the food and drink sector. If you are interested in participating in the forum, please e-mail AgriFoodDiversity@aon.ie.



Conclusion

There is a clear disconnect between the business leaders and their employees on some of the key issues around diversity and inclusion.

Largely, employees think that the organisations they work for are further advanced in their D&I journey than Business Leaders say they really are. In other areas there is a gap in perception only, with employers already providing many of the support and development tools employees say they are still seeking. Recruitment of talent is a clear struggle for the business leaders – but the findings of this survey not only give a clear view of the things employees want, but also show that in many cases, employers are already offering them.

Communication should be central to all employers' strategies around Diversity & Inclusion. In many cases, the foundations are in place but now they must be communicated to employees who seem unaware of their existence.

Communication is not the only challenge, however. More than 80% of business leader respondents to the survey say they are only embarking on their D&I journey, a figure that hasn't seen significant change since 2018. The industry should be more advanced than this, and action here is a priority.

For those not yet providing the support employees seek, in many cases a few small, practical steps would go a long way towards closing the gap between desired and current state and therefore make it far easier to recruit talent in this competitive sector.

85% of business leaders believe their challenges in attracting, retaining and developing talent are a risk to the business's growth; a figure that has shown no improvement since the 2018 survey. The business leaders need to prioritise Diversity & Inclusion if they want to overcome this risk.

The sector needs to define its current talent needs and identify ways to work towards delivering on them, so that firms can put in place the measures needed to support Diversity & Inclusion.

Business Leaders should assess their current skills base and identify ways that improved approaches to D&I will help them to meet their emerging talent needs. Diverse input and new ways of thinking are essential in helping the industry to progress: proactive D&I strategies will help firms to achieve this diversity of thought and approach.

"It is clear from the findings of this survey that employees want to see their employers 'walking the talk' when it comes to actions to promote diversity and inclusion. Small, practical changes can make a huge difference when it comes to D&I. The results clearly show the need for action, and for industry-wide support from groups like the Agri-Food Diversity & Inclusion Forum."

– **Survey participant**

Survey Methodology and Research Objectives

Survey Methodology

The survey, conducted in Q4 2019, gathered information from both an organisational and an individual perspective.

The survey targeted CEOs, Senior Leaders and employees working in the sector. Both groups were surveyed to capture their respective views and insights on Diversity & Inclusion. In order to complete the survey, access to a computer / laptop was required. Responses from 46 CEOs and Senior Leaders were received, and 204 employees working in the sector completed the survey.

These web-based surveys addressed both qualitative and quantitative D&I issues. Aon conducted this survey on behalf of the Agri-Food Diversity & Inclusion Forum. The Advisory Group and Taskforce had the opportunity to provide feedback and suggestions on the draft survey question set developed by Aon, with input from Bord Bia.

All responses are held confidentially, with only the consolidated data being incorporated into this report. Percentages for some of the responses may not add up to 100 percent due to rounding or respondents being able to select more than one answer.

Research Objectives

The initial remit of the Advisory Group and Taskforce was to conduct research to measure current gender equality metrics across the industry, and to understand current challenges with progressing the D&I agenda. In 2018 AgDIf published the results of an industry survey and this research represents the second phase of that work.

The key strategic research objectives in conducting the 2020 survey are as follows:

1. Enable the D&I conversation – raise the profile of the gender equality agenda and encourage industry to participate in the research.
2. Provide a forum for both individuals and companies to provide input to AgDIf, and specifically share their views on gender diversity.
3. Generate robust data, both qualitative and quantitative, to measure the current stage of gender diversity in the sector.
4. Capture key sentiments, quantitative benchmarks and performance.
5. Compare the responses from CEOs to responses from employees to identify whether there is a perception gap in the sector's D&I maturity.
6. Publish a report to document the findings and insights gleaned from the research.
7. Share and debate the survey findings with the sector.
8. Evolve the D&I conversation in the Irish Food and Drink sector beyond the introduction of D&I concepts to incorporate recommendations for meaningful action.
9. Leverage the research results to inform the work plan for the AgDIf group.

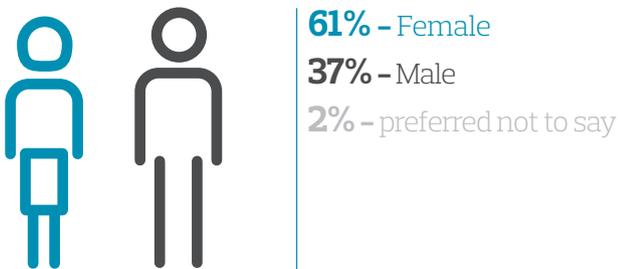
Profile of Respondents

Participating organisations in the survey ranged in size from small companies to Ireland’s largest food and drink businesses, both in terms of turnover and employee numbers. A broad mix of roles and seniority levels participated in the research, from entry level and junior staff to Board of Director and CEO. There was excellent cross-sectoral participation from both the company and individual surveys ensuring that a representative range of views have been captured.

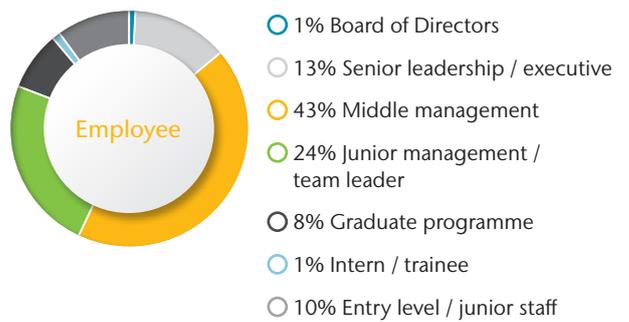
What is your total annual revenue (turnover) for the most recent financial period?



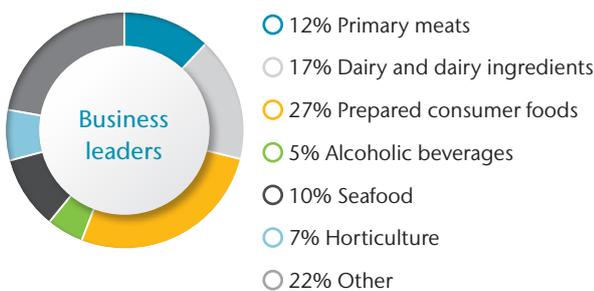
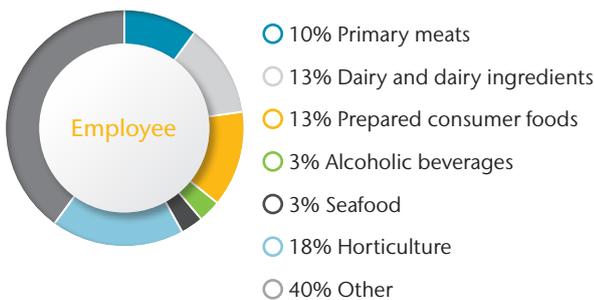
Employee - What gender are you?



Which of the following levels best describes your role level in your organisation?



Please select the main industry sector that applies to your organisation





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