



Impact report 2023

Creating hope, health and happiness
for everyone in retail



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Our impact in a snapshot

It's been another strong year for the Retail Trust as we continued our mission to create hope, health and happiness for everyone who works in retail. Against a backdrop of a deepening cost-of-living crisis and a sharp increase in theft and customer intolerance, we supported, inspired and advocated for the industry. These are just some of the numbers that illustrate our social impact during the 12 months from 1 May 2022 to 30 April 2023.



*The combined total of in-the-moment helpline support and multiple session brief therapy

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The Retail Trust's purpose

Our mission is to create hope, health and happiness for everyone who works in retail.

This purpose is at the heart of why the Retail Trust exists and has been part of our DNA since we were established in 1832. Whether at the beginning or the end of their retail career, we put our colleagues at the heart of everything we do.

The retail industry continues to face a huge wellbeing challenge. According to our own research, the ongoing cost-of-living crisis, increasing customer intolerance and the struggle to achieve work-life balance, have left retail workers feeling anxious, unable to sleep and overwhelmed.

We believe that health and happiness should be accessible to the many, not the few and in order for industry and society to flourish, business must play a pivotal role in tackling health inequality. By helping to set standards and working alongside retailers of all sizes we are building a coalition that champions the notion that happy, healthy people create thriving businesses.

Our 'for retail, by retail' proposition means we are uniquely placed to make a difference and drive better wellbeing in retail and beyond. Addressing the causes of poor workplace wellbeing, as opposed to dealing with the symptoms, is a key focus.

We will continue to build tools and expertise to enable colleagues to look after their mental, physical and financial health and empower leaders to better support the health and happiness of their teams.



Calculating social value

Our partner in creating our social value calculations is Loop. Loop is a consultancy that applies HM Treasury Green Book calculations of social value to our activities.

This is the first year we have used new and more accurate measures of social value that conform to the Wellby standard. The Wellby is a measure backed by the Government's Social Impact Task Force that takes as its base a one-point change in life satisfaction for one year.

We have moved to the new KPIs because they are now the only accepted measure of social value.

Using the new measure of social value, the Retail Trust delivered over £91 million of social and economic value to individuals and local communities. The numbers reflect in financial terms the impact we have had on the lives of the colleagues we have supported. The total includes savings to the NHS through improved health and wellbeing benefits, better life opportunities and a reduction in sick pay claims.



Wellbeing: supporting retail colleagues when they need it most

Through our 24-hour helpline, counselling, critical incident support and financial aid we've been there for retail colleagues during a year which saw a sharp rise in retail theft, an increase in assaults and abuse directed at retail colleagues and the ongoing cost-of-living crisis deepen.



We were there for retail colleagues at crisis point

The combined total of in-the-moment helpline support and multiple session brief therapy saw us deliver 17,497 counselling sessions. The majority were taking proactive measures to support their wellbeing, with 74% making contact before taking sick leave. However, at the point they got in touch 88% said their home life had already been impacted and 77% told us their work life had been affected. Of those who were already off sick, 39% contacted us within a week but, worryingly, 27% left it four weeks or more to get in touch.



We helped teams cope with critical incidents

While everyone hopes they won't have to deal with a critical incident at work, when the worst happens, we were there to help teams via remote or on-site one-to-one or group support. Across 59 critical incidents we supported 452 individuals, the majority of which involved the death or suicide of a colleague or customer (74%). Robbery, theft and assaults on colleagues made up 10% of the critical incidents.



We provided essential cost-of-living support

The ongoing cost-of-living crisis has left thousands struggling financially, which can have a huge impact on mental health. We helped 1088 people and their families via financial aid, with an average award of £521.88. The top reasons for people requesting financial aid remained rent, utilities and council tax, however requests for support with food leapt from the tenth to the sixth most common reason for people getting in touch, accounting for 6.9% of requests, nearly three times the previous year (2.4%).



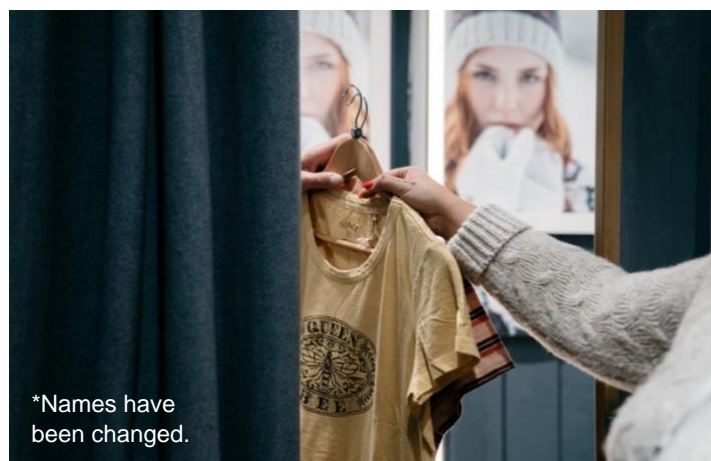
We upskilled managers and retail colleagues

Our health of retail report found that managers are still under pressure to support their teams' wellbeing, with 46% saying they had at least one team member experience a mental health issue they didn't feel equipped to deal with. While most (70%) have access to tools to support their teams' wellbeing, 83% would welcome more training on how to use them. Addressing this ongoing need, we facilitated mental health and wellbeing training for 2,319 managers and retail colleagues but, clearly, more needs to be done. Our CPD certified course **Taking stock of wellbeing in retail** is a great place to start.

Case studies

Critical incident case study: “Without the Retail Trust I’d be in a very dark place”

Last summer two groups of men with machetes ran into the high street store Annie* manages. Luckily no one was hurt but the terrifying incident left the staff shaken. The head of HR reached out to the Retail Trust and a specialist trauma responder was sent to support Annie and her team.



“We’re a close-knit group but we were struggling. My deputy felt angry, another team member was worried they’d come back, I didn’t want to leave the house and couldn’t stop thinking about the what ifs. A week after the incident Peter* came to see us. He was a tonic; lovely and calming. He explained how to park our thoughts and gave us lots of tools. Three weeks later we had a second session and talked about what had helped us. The counselling was invaluable. If I hadn’t spoken to anyone I’d be in a very dark place. I’ll take the tools with me through the rest of my life.”

Financial aid case study: “Thanks to the Retail Trust Connor will get the help he needs”

It costs £10,000 to train an autism support dog and so when Emily Wilkinson’s son Connor passed his assessment the family started fundraising with coffee mornings, a raffle, a sponsored bike ride and more.



“My manager at work asked if I’d approached the Retail Trust for help with fundraising. I filled in an application form online and a few weeks later received a call telling me we’d been awarded £700. It was a massive boost and because we’d raised enough money to pay for the early stages of training, we were told we’d been allocated a puppy, who we named Rollo. Connor doesn’t really understand Rollo will live with us one day, but we’re excited to welcome him into our home when he is fully trained.”

Financial aid case study: “I could focus on looking after my terminally ill mother”

Retail worker Maria* contacted us after falling behind on her rent and council tax. We provided financial support, alleviating her worries and allowing her to focus on caring for her sick mother.



“I took a career break to help care for my mother, who was diagnosed with a terminal illness. I contacted the Retail Trust for financial help towards my council tax and rent arrears and was awarded a grant. I felt like a massive weight had been lifted from my shoulders. It was bit of good news in an incredibly bleak time in my life and meant that I had one less thing to worry about.”

Training case study: “Our managers feel equipped to have wellbeing conversations”

In partnership with the Retail Trust, Phase Eight ran three different training programmes between May 2022 and April 2023: taking stock of wellbeing in retail, wellbeing warriors and menopause training for line managers.



“As a business, we understand the importance of supporting our colleagues’ wellbeing. Following the wellbeing warriors training that we ran in December 2022, we launched our wellbeing warriors programme. Our wellbeing warriors are made up of central team colleagues and store managers and the initiative is one that we speak about regularly within the business. Our warriors feel well supported with the roundtable aftercare and the communication they receive from the Retail Trust.”

Rachel Carr, head of HR, Phase Eight

Events and campaigns: helping the retail industry to thrive

It's been a year of innovating, campaigning and bringing people together to be inspired and debate the big issues impacting retail today.

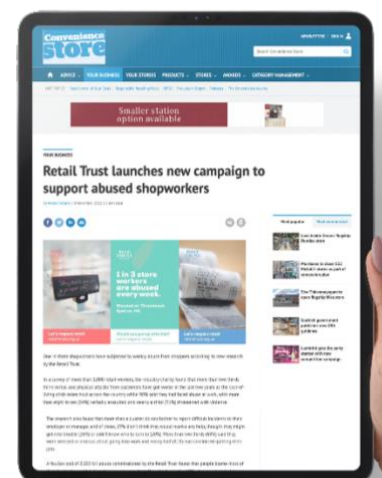
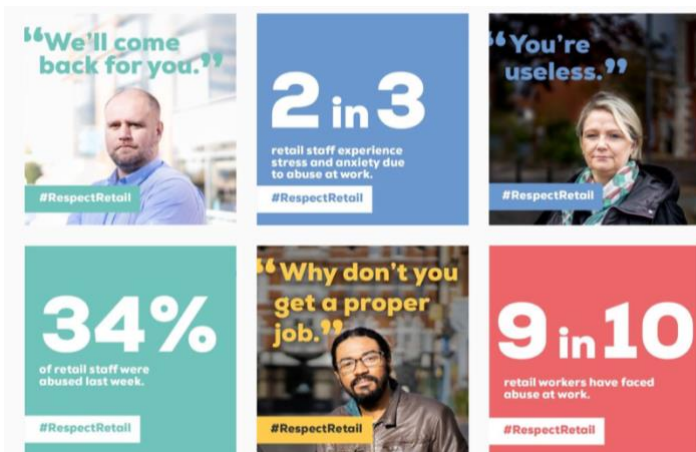
We held our first wellbeing festival for retail colleagues

In May, 600 attendees from nearly 100 partners gathered in London's Truman Brewery for Together Fest, the first UK wellbeing festival for retail colleagues. The thoughtfully curated one-day programme featured workshops to energise the mind, spaces to relax the body and speakers to inspire action, including headliners Jamie Laing, Nicola Roberts and Roman Kemp and experts including burnout coach Jayne Morris, anxiety expert Joshua Fletcher and Lucas Whitehead from Andy's Man Club.



We launched our respect retail campaign

In response to the shocking rise in abusive customer behaviour aimed at frontline workers, and backed up by robust research, we launched a campaign to protect the wellbeing of colleagues and stop the intolerance epidemic. The campaign secured coverage across national TV, radio, print and online, including BBC News, Daily Express, Daily Mirror, BBC Radio 2, and Retail Week, reaching one billion views. 75 companies pledged their support.



We brought 200+ people leaders together

We kicked off 2023 with our second Leaders' Summit. More than 200 leaders from over 100 organisations attended the one-day event at the Pan Pacific hotel in London. Mental health trailblazers, industry change makers and forward-thinking retailers debated the most urgent topics impacting the retail industry today.



We reported from the retail frontline

The second annual health of retail report gave clients valuable insight, identified the need for further colleague wellbeing support and identified trends to springboard key client content.



Event feedback

Leader's Summit feedback

"Great day, well worth attending, lots of takeaways and next steps."

Julia Lyles, Sally Beauty

"The domestic abuse session was such an impassioned and inspiring talk. Having a domestic abuse policy is something that we will be implementing within our organisation."

Clare Skitmore, TFG brands

Together Fest social buzz

"What a great way to spend a Thursday in mental health awareness week. Reconnecting with colleagues, listening, learning and thinking."

Donna Jenkins, Clarks

"We had a great day talking about mental health and wellbeing in the workplace, sketching flowers laughing at the stand-up comedy, taking part in facial yoga, listening to interesting talks and had a bit of a dance! We left feeling energised and inspired! Thanks so much for having us."

Harvey Nichols team

Supported living: promoting healthy, happy aging

Our five supported living estates across the UK provide a safe haven and happy community for more than 450 residents. This year we've continued to upgrade central buildings and older housing stock, to ensure our estates meet our residents' needs.

We completed upgrade work at our London estate

£1.7 million has been invested in the refurbishment of Marshall Hall, a beautiful, listed building in the centre of Marshall Estate. The refurbishment created ten new smart flats. Residents of our smart flats benefit from voice-activated power sockets, heating controls and light switches giving them more control over their lives and supporting them to live independently in their own homes for longer, which has a profound effect on wellbeing levels. We also introduced super-fast fibre optic broadband to all the other 72 properties within the estate.



Chris Brook-Carter, CEO, the Retail Trust, with Edward Bentall and daughter Holly Hunter, trustees of the Rowan Bentall Charitable Trust, a funder of the Marshall Hall development.

We started refurbishment at our Glasgow estate

Crookfur House is the central core of the Hugh Fraser Retirement Estate in Glasgow. Built in 1964 the building is in need of a full refurbishment including new plumbing, heating and electrical system infrastructure. The building includes a conservatory restaurant, lounge and activity space where a host of events and activities take place, all of which will be fully upgraded to provide comfortable and flexible spaces for residents to enjoy.

Case studies

Extra-care case study: “Moving to Moores House gave me back my independence”



Dorothy Hill with daughter Tracey

Following a brain tumour, Dorothy Hill, 80, moved in with daughter Tracey to recover. A few months later, keen to regain her independence, she moved into an extra care flat, in Moores House, Salford.

“Before moving in with Tracey I lived in sheltered accommodation, with no warden, just a buzzer, but I needed more help, then Tracey heard about Moore’s House. My flat is perfect, on the first floor so I can have a window open at night and near a lift as my mobility isn’t great. When I moved in the flat had been decorated, new carpets fitted and all my furniture set up. The staff are amazing and the entertainment is fantastic. I’m pleased Tracey has peace of mind knowing I am safe and well looked after.”

Supported living case study: “I feel safe and secure after years of chaos”



After moving out of his marital home due to the deterioration of his wife’s mental health, Ian, 71, was eventually placed in a hostel by a homeless charity. The manager told Ian about the Marshall Estate. He was one of the first to move into the renovated flats in Marshall Hall in February 2023.

“After two years of chaos, I feel safe and secure and rejuvenated beyond measure. Life feels orderly, calm and peaceful. Barring a lottery win, this will do magnificently to see out my days. My flat is well laid out, ideal for a single person and the facilities are excellent. It feels like home and allows me to be me.”



For more information on the Retail Trust's services please contact:

Mike Chiswell, head of wellbeing commercial

mchiswell@retailtrust.org.uk | 07725 672461

Author **Miranda Eason**

Analysis **Seye Sampson**

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