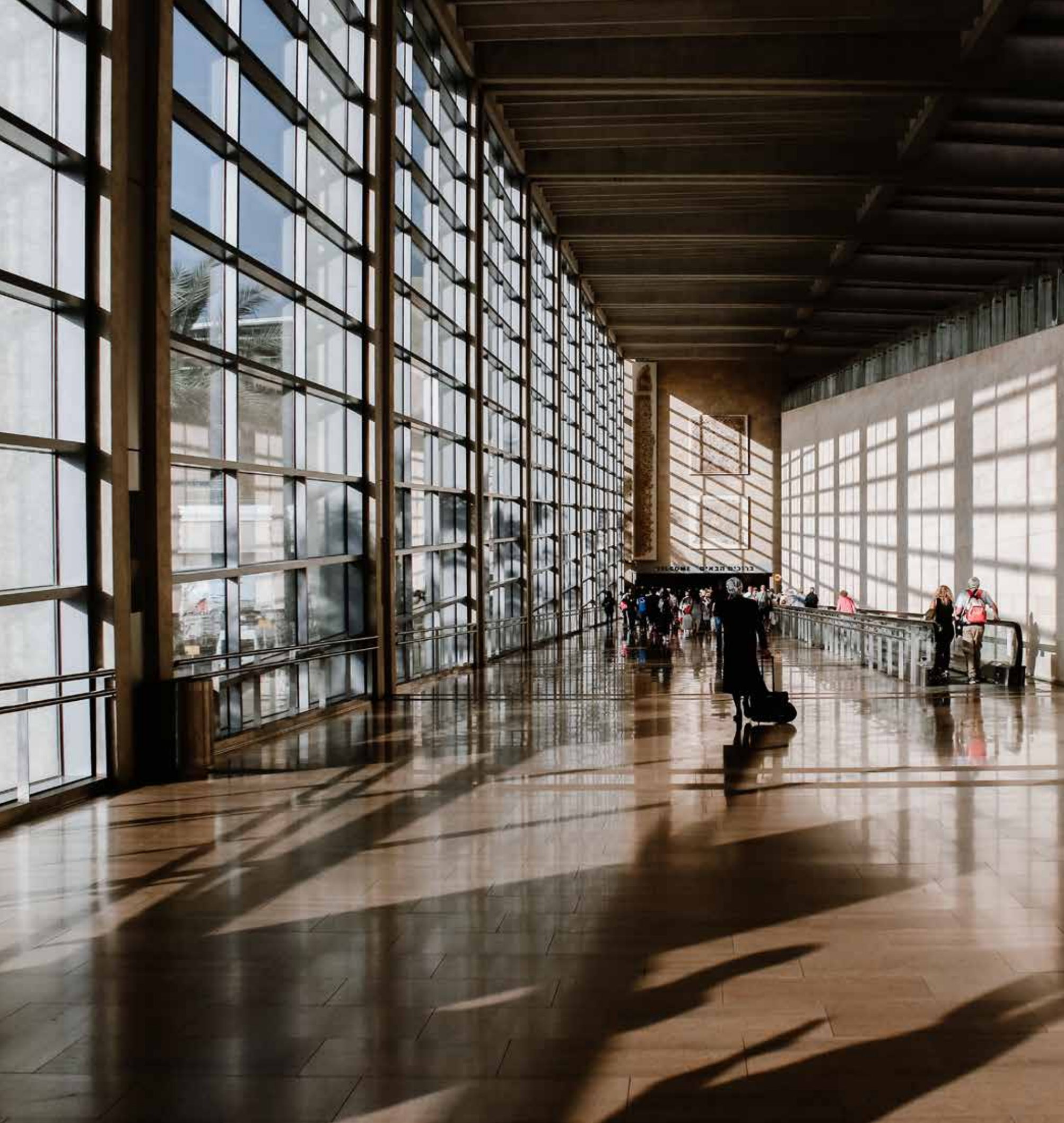


MBS Intelligence

Women in Hospitality, Travel & Leisure 2020 Review

2019 Edition: Collaborating to Achieve Diversity and Inclusion





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Welcome

The WiH2020 (Women in Hospitality, Travel and Leisure 2020) campaign was launched at the end of 2017 to assess whether the sector would achieve the target set by the Hampton-Alexander Review of 33% women in senior executive positions across FTSE350 companies.

The inaugural WiH2020 report published in early 2018 highlighted that while companies across hospitality, travel and leisure were making progress towards increasing gender representation at senior levels and identified pockets of excellence, the industry faced some tough challenges ranging from operational barriers to an outdated cultural mindset. The lack of role models and senior influencers and the significant loss of talented women at middle management level were also highlighted as key challenges.

Since the launch of the 2018 report, the industry has come together with the aim of making a real and lasting difference in gender representation through the WiH2020 collaboration platform. Over 50 of the largest employers in the sector are meeting regularly and sharing best practices, learning from each other, identifying tangible actions for collaboration and amplifying the impact of individual initiatives. In 2018, we launched the Diversity in HTL Charter and some of the largest employers in the sector have now signed up to the Charter. Many CEOs are making a personal commitment in relation to the 10 action points listed in the Charter to both their internal and external stakeholders and I am hugely grateful for their support and participation in the WiH2020 campaign.

Our 2019 report highlights that the progress made so far is encouraging. The sector is making great strides towards the target of 33% women in FTSE 350 leadership teams by 2020 and there are signs that momentum is being built in a sustainable way, with gender diversity amongst Direct Reports (into the Executive Committee) looking particularly promising right across the sector.

However, it is also clear that there remains a great deal of work to do. Over the last year, the gap between companies performing well and those that still have a way to go has widened. Despite an ever-increasing pool of female executives and non-executives to choose from, women occupy just 7% of the CEO, CFO and Chair triumvirate in FTSE 350 HTL businesses, and only 10.4% of CEO roles across the HTL sector are held by women. It looks like this shortage of women in key leadership roles is unlikely to change in the near term.

The spotlight has been on listed businesses for a number of years now, so it is not surprising that FTSE companies in the sector have made strides towards greater gender diversity. However, since our last report, the emergence of mandatory gender pay gap reporting has helped to ensure that the issue is pushed up the agenda even for non-listed businesses who have until now been under less public scrutiny. Our research shows that, while the number of women on Boards is lower for non-listed businesses, they compare well with the FTSE 250 for gender diversity when it comes to their Executive Committees and Direct Reports.

For the first time, the 2019 Review has looked beyond gender and thrown light on the lack of ethnic diversity amongst the sector's senior leaders. BAME (black, Asian and minority ethnic) talent is significantly under-represented, with just 1 in 33 leaders (Combined Board, ExCo and Direct Reports) across the whole HTL sector. This is an area WiH2020 will focus on over the coming months.

Change is happening. However, a sustained and systematic focus is still required, especially on all aspects of recruitment, development and retention. The progression of women remains a key objective, coupled with an emphasis on creating an environment in which all talent can thrive, leadership stereotypes are challenged and individuals are valued for their skills and capabilities. The 2019 report showcases some best in class examples from the most progressive organisations in the industry, as well as some ground-breaking collaboration initiatives where companies, working together under the WiH2020 umbrella, are making a real difference, such as the launch of the first ever cross industry Returners Programme – Comeback to HTL – aimed at attracting and supporting women returning from a career break.

This collective momentum is starting to show clear results and there is a real opportunity for companies in the Hospitality, Travel and Leisure sector to lead the way. I look forward to more CEOs engaging with the WiH2020 campaign, signing the Diversity in HTL Charter and joining the many collaboration initiatives we have planned for this year.

I would like to thank the Sponsors of this Review - Jon Terry at PwC and Elliott Goldstein at The MBS Group and their teams - for their great support throughout the year, as well as a number of visionary CEOs and Senior Leaders across the sector for their time, encouragement and contribution.



Tea Colaianni

Chair and Founder WiH2020
Diversity in Hospitality, Travel and Leisure

Forewords

Delivering a workplace fit for the 21st Century, one which harnesses the power and potential of women, is not only the right thing to do but is good for business. It is estimated that bridging the gender pay gap in work would add £150 billion to the UK economy by 2025¹

This is why the work of the WiH2020 campaign, with its ambition for 33% of executive leadership positions being held by women by 2020, is so vitally important.

It is great to see just how much progress has been made over the past year.

For the first time, there are no all-male FTSE 250 boards in the Hospitality, Travel and Leisure sector (HTL) and the number of women on these boards has increased. Taking an average across the sector, the percentage of women among Direct Reports to the executive committee has already significantly surpassed the Hampton-Alexander target of 33%. It is possible that the same target could be reached regarding the composition of executive committees by the end of 2020, but this will require a concerted, cross-industry effort.

However, the report also makes clear that a step change is still required if the sector is to improve its gender balance at CEO, CFO and Chair levels. There is a large number of women entering the HTL sector at more junior grades, yet this is not reflected within these senior executive roles.

Female role models are key and we need to see more of them filling top executive-level roles within this sector. Our work on the Women's Business Council has also highlighted just how important it is for men to become the agents of change within their sector as well. Everyone has a role to play.

Transparency is also key. The recent gender pay gap reporting regulations are already playing a key role in highlighting gender inequalities. The work of the WiH2020 campaign complements this drive for transparency, supporting companies in assessing where they are on this agenda and then begin to take action to resolve any inequalities in the way their companies are governed.

The HTL sector in the UK must build on the momentum highlighted in this report demonstrating that it is a world leader on this agenda.



Dame Cilla Snowball
Chair of The Women's Business Council

The hospitality sector is one of the most diverse and exciting in the UK. We are the 3rd largest private sector employer in the country, providing employment for 3.2 million people, which is double the number in financial services. Hospitality businesses spend £10 billion on capital each year in local communities around the UK. The sector creates £130 billion in economic activity, more than the automotive, pharmaceutical and aeronautical sectors combined. Our businesses also pay £39 billion in taxes, providing vital funds for national and local public services.

The number of people employed in hospitality is huge and one of our great strengths is that we recruit from every region of the UK across a wide spectrum. The industry is open to anyone, regardless of age, gender or socio-economic background. We pride ourselves on offering opportunities irrespective of background, and provide career opportunities and training across a wide and dynamic range of vocations.

Hospitality businesses already offer a wealth of opportunities, but there is certainly more we can, and should, be doing. Female representation in the hospitality, leisure and tourism sectors at an executive level is still not good enough. Like UKHospitality's recent foodservice management report, this year's WiH2020 review shows there are pockets of improvement and brightspots in the data – but there is also some way to go.

Diversity at a senior level can only be a good thing, not just in hospitality, and there are promising signs that we are heading in the right direction. UKHospitality is committed to promoting diversity in the sector and to help facilitate that, we are a key signatory of the Diversity in Hospitality, Travel and Leisure Charter. The Charter commits us to a ten-point action plan to promote inclusivity

and diversity in the sector. As part of this pledge UKHospitality together with Odgers Berndtson, Elliotts and BT Sport have set up the first industry-wide mentoring initiative which was launched at the BT Tower in London in October. The initiative aims to help female managers working in hospitality and leisure to break through into senior executive and board level roles.

We are also very pleased to throw our full weight behind the Women in Hospitality Travel and Leisure 2020 initiative, which will help us achieve the goal of 33% representation by the end of next year. This will be a crucial foundation for achieving even further progress in the years to come. Diversity and inclusivity is one of the sector's key strengths, allowing us to draw from collective experience and wisdom, and is something we should look to encourage. The Women in Hospitality Travel and Leisure 2020 initiative is a fantastic way to ensure that hospitality continues to provide women with opportunities at the highest level which will, in turn, ensure that businesses are in a better position to offer even more.



Kate Nicholls
CEO UKHospitality

¹ McKinsey, 'The Power of Parity: Advancing Women's Equality in the UK' (2016)

Executive Summary

BY ELLIOTT GOLDSTEIN –
PARTNER, THE MBS GROUP

BUILDING ON MOMENTUM
THROUGH COLLABORATION
AND A RENEWED FOCUS



The MBS Group has been championing diversity in the Hospitality, Travel & Leisure (HTL) sectors for over thirty years, so we were delighted to be asked to join forces with the WiH2020 initiative and PwC to provide the research for this report. Over the last few months, we have spoken with the CEOs, Chairs or HR Directors of over 100 of the most significant businesses across HTL to understand the true picture of diversity in our sectors and to capture examples of practices being implemented to achieve greater diversity.

Positively, our research shows that the sector is making great strides towards the Hampton-Alexander target of 33% women in FTSE 350 leadership teams by the end of 2020 – the target the WiH2020 organisation was formed to help the industry achieve:

- Women now make up 23.6% of leaders in Boards across our sectors
- Larger FTSE businesses have made the best progress: for FTSE 100 businesses in our sector, 32.2% of Board positions are now held by women
- Non-listed businesses have further to go; just 18.2% of Board members are women

Digging beneath these headline figures are some particularly encouraging signs. Within the FTSE 250, diversity has risen by more than 2% since 2018 in 3 out of 4 measures:

| | % WOMEN | CHANGE SINCE 2018 | COMPARED TO CROSS-SECTOR AVERAGE |
|---|---------|-------------------|----------------------------------|
| FTSE 100 board | 32.2% | Up 3.4% | 2% above |
| FTSE 100 combined ExCo & direct reports | 28.0% | Up 2.3% | 1% above |
| FTSE 250 board | 22.4% | Up 2.6% | 2.5% below |
| FTSE 250 combined ExCo & direct reports | 27.8% | Down 0.5% | 2.9% above |

Most positively, when you look beyond just FTSE listed HTL businesses, there is a ground-swell of female talent now operating at the level beneath Board. Indeed, over 37% of Direct Reports (into the Executive Committee) of non-listed businesses are now women.

| | HTL AS A WHOLE | HTL FTSE 350 | HTL NON-LISTED |
|------------------------|----------------|--------------|----------------|
| Board | 23.6% | 25.1% | 18.2% |
| ExCo | 25.4% | 19.7% | 28.0% |
| Direct Reports to EXCO | 35.9% | 35.4% | 37.4% |

In our interviews across the sector, we were very pleased to hear how serious many companies in the HTL sector are at developing and retaining female talent – and some of the investments they are making to achieve this. The above data suggests that many of these initiatives are starting to bear fruit – and certainly bodes well for the future of our sector.

However, it is also clear there remains a great deal of work to do. While some companies are advancing the gender diversity agenda very effectively, the overall figures provide cover for a small number of companies who are lagging behind. Over the last year, the gap between companies performing well on gender diversity and those that aren't, has widened – and from our interviews with these companies, it is clear that advancing female talent isn't a serious agenda item for many of their leaders.

Virtually all companies in the sector need to make significant progress in one metric or another. In particular, the industry as a whole has a severe lack of women in key leadership positions. Women occupy just 7% of the key CEO, CFO and Chair leadership positions in FTSE 350 HTL companies – and that number looks set to remain stubbornly low in the years ahead.

As part of this report, we have also looked at the status of ethnic diversity within our sector. This was by no means an easy task – and not something that has been reported on before – because most companies do not hold accurate data on ethnicity. Our research paints a truly abysmal picture – with just 1 in 33 of the leaders in our sectors coming from a BAME (black, Asian, minority ethnic) background (noting, 1 in 8 people of working age in the UK are BAME).

Since the inaugural Women in Hospitality, Travel and Leisure report was published last year, mandatory gender pay gap reporting has pushed gender diversity higher up the agenda – particularly for non-listed companies that were previously largely shielded from public scrutiny. The potential of ethnic pay gap reporting, currently being consulted on, could well produce a similar effect. As our sector edges towards achieving its diversity goals in gender, it is clear there is still a huge amount to do to achieve ethnic diversity at a leadership level.

All of this serves as a reminder of the need for the industry to come together and collaborate to find sector-wide solutions to diversity challenges. Over the last 18 months, under Tea Colaianni's passionate and committed leadership, over 50 companies have come together under the WiH2020 umbrella to share, learn from each other, join resources to work on tangible initiatives aimed at making long-lasting impact in terms of diversity and inclusion.

The work carried out by the industry for the industry is innovative and humbling as organisations have agreed this is not an area where they should compete against each other. They have realised that it makes business sense to collaborate for the good of the industry and enhance the attractiveness of the sector to a wide talent pool.

To make real progress in diversity and inclusion, businesses need to elevate the issue onto the CEO's agenda and align the D&I strategy to the fundamentals of the business. In this report, PwC's Jon Terry outlines how businesses can turn good intentions into practical progress.

The HTL sector can rightly be proud of the genuine progress it has made to date. But now is not a time to get complacent. We have been buoyed by a groundswell of progress running through the sector. Hopefully, this will act as motivation for us all to redouble our efforts and build on the good work already done.

The Diversity in Hospitality, Travel & Leisure (HTL) Charter

In early 2018, WiH2020 launched the Diversity in HTL Charter. The Charter sets out 10 action points companies are asked to commit to. No specific targets were set as we recognise that each company is on a unique journey, with some being at the early stages of their Diversity and Inclusion journey and others being well advanced.

The Charter encourages companies to set their own objectives and priorities, whatever they may be, in the D&I space: gender, LGBT+, age, ethnic minorities, disability etc. Making a public commitment to the Diversity and Inclusion agenda removes optionality: once you have committed publicly to the Charter you have to take action.

Importantly, the Charter encourages companies to share best practice, collaborate on joint initiatives and participate in industry-wide surveys and projects coordinated by WiH2020.

The companies that have signed the Diversity in HTL Charter to date have proudly announced their commitment to progressing the D&I agenda to their stakeholders, and are actively engaged in learning, sharing and collaborating to move the D&I dial not just for themselves, but for the good of the whole Hospitality, Travel and Leisure industry. To find out more about how to support the WiH2020 campaign and to sign the Diversity in HTL Charter, please visit www.wih2020.com.

THE CHARTER

We ask that companies signing up to The Diversity in HTL Charter commit to a 10 point action plan.

- 1** My company will have a diversity and inclusion strategy
- 2** My company will review the strategy and progress towards it annually
- 3** My company will set its own diversity goals, aligned to its strategy
- 4** I will include diversity in my personal objectives, aligned to the company's strategy
- 5** My company will review people policies and processes (for all staff) to promote an inclusive culture
- 6** I will support the progression of women into senior roles by focusing on the executive and the mid-tier level pipeline
- 7** My company will publish our Gender Pay Gap annually, and will include an explanation as to the causes and actions to address the issues, in order to promote transparency
- 8** My company will actively contribute to the Diversity in HTL Charter programme and provide constructive feedback
- 9** My company will take part in Diversity in HTL relevant surveys and research initiatives
- 10** My company commits to work collaboratively with others to tackle barriers to diversity

The numbers

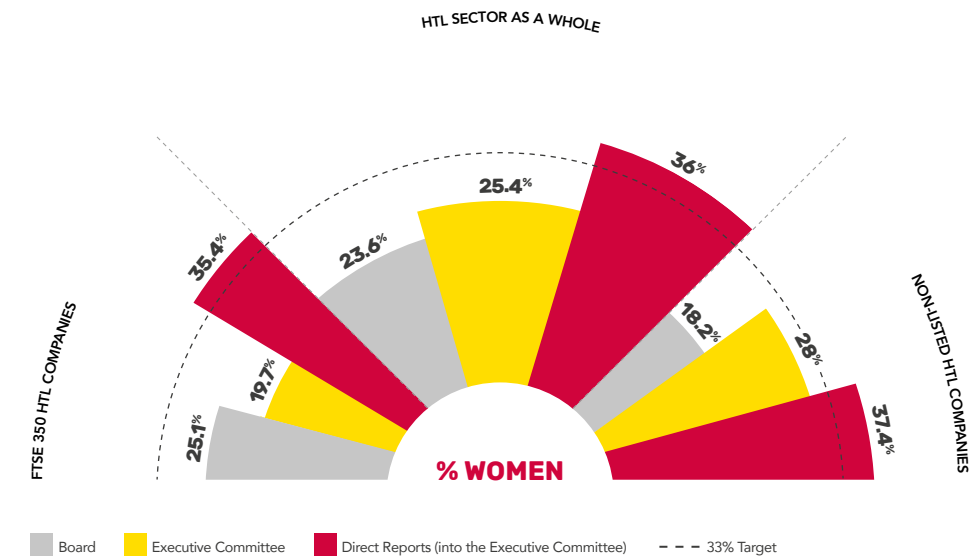
RESEARCH AND ANALYSIS
BY THE MBS GROUP

DIVERSITY IN THE HTL SECTOR

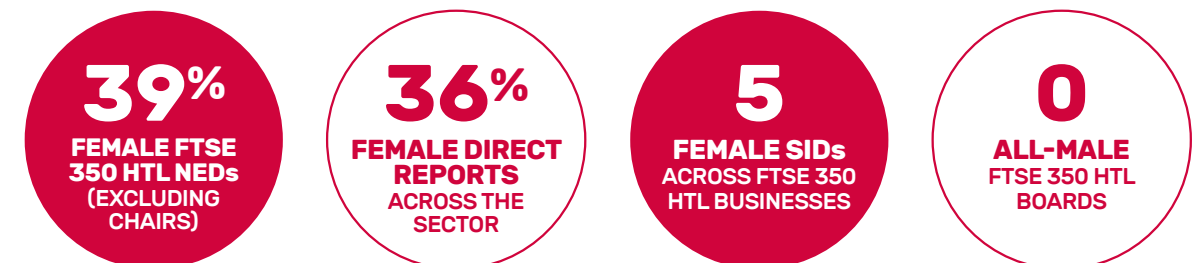
Over the last few months, The MBS Group has conducted extensive research to understand what progress is being made by the Hospitality, Travel and Leisure (HTL) sector towards greater gender diversity. In line with WiH2020's mission, we are seeking to understand how the sector is performing against the targets laid down in the Hampton-Alexander Review – that is a 33% target for women on boards and in leadership teams of FTSE 350 companies by 2020 – and beyond. We have collected data from over 120 companies of scale across all sub-sectors, as well as interviewing over 100 CEOs, Chairs and HR Directors to get under the skin of the issues affecting progress. We have also taken a deeper dive into the FTSE 350 HTL companies that are included in the latest Hampton-Alexander Review, released in November 2018, to understand how the sector is performing versus its peer group.

Over the next few pages, we outline some of the most interesting data, while in the following chapter we delve into some of the key themes that emerged from our conversations.

The Headlines



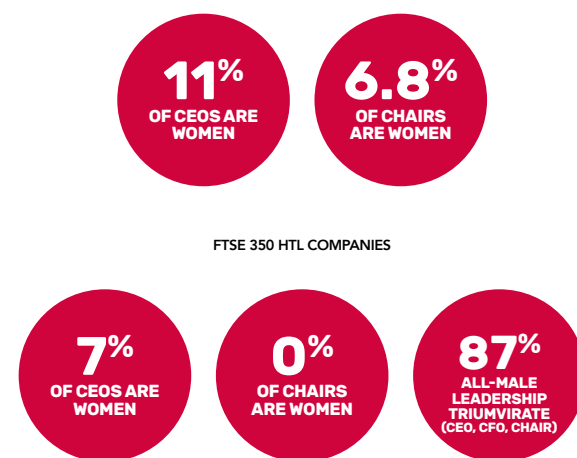
HIGHLIGHTS



REQUIRING IMPROVEMENT



KEY RESEARCH HIGHLIGHTS



COMMENTARY

THERE IS A SEVERE LACK OF WOMEN IN KEY LEADERSHIP ROLES ACROSS THE HTL SECTOR. THIS IS TRUE OF BOTH NON-LISTED AND FTSE 350 COMPANIES.

WHILE THE OVERALL TRENDS FOR DIVERSITY AT BOARD AND IN SENIOR LEADERSHIP ROLES ARE IMPROVING, THIS IS NOT REFLECTED IN THE KEY ROLES OF CEO, CHAIR AND CFO WHERE PROGRESS HAS BEEN POOR.

THE PROBLEM IS NOT UNIQUE TO THE HTL SECTOR. THE LATEST HAMPTON-ALEXANDER REVIEW, PUBLISHED IN NOVEMBER 2018, HIGHLIGHTED IT AS A PERVERSIVE ISSUE THAT NEEDS TO BE BETTER UNDERSTOOD ON A CROSS-SECTOR BASIS.

One, but not done?

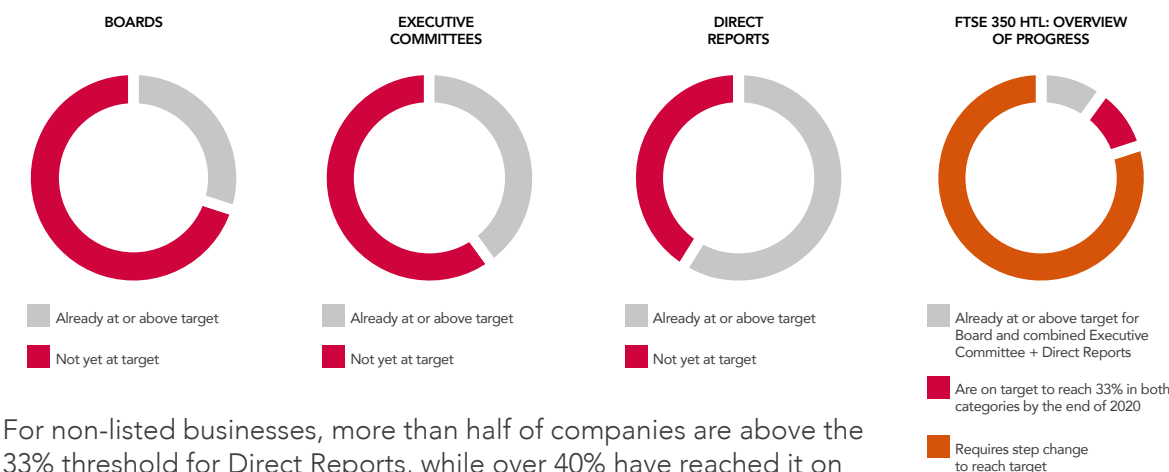
The latest Hampton-Alexander Review has called out 'one and done' companies – that is businesses with just one woman on their Board – who are dragging down overall progress. We have identified seven FTSE 250 HTL companies as being 'one and done'. However, it is worth noting five of those seven companies have either already hit the 33% level for Combined ExCo and Direct Reports or they are on target to do so by the end of 2020, highlighting the different challenges individual companies face.

Outside of the FTSE 350 index, the 'one and done' label applies to 8 companies. However, of these 8 companies with only 1 female board member, 5 have hit (and in some cases, far surpassed) the 33% target for either their Executive Committee or Direct Reports population. This reinforces the point that companies have different approaches to diversity, investing in different parts of the talent pipeline.

NON-LISTED VS FTSE COMPANIES

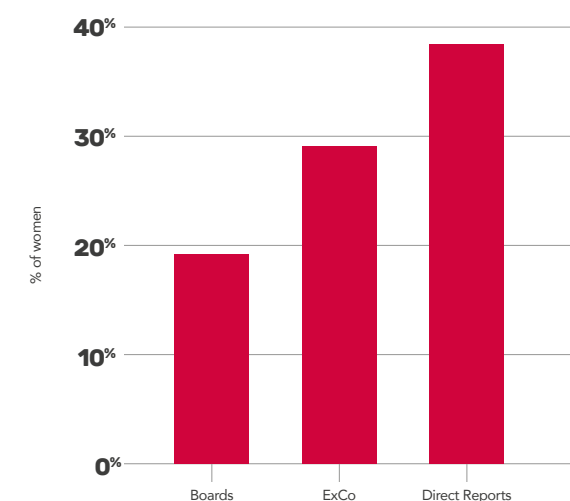
At company level, it is clear most companies have work to do on at least one key metric – whether that's on their board or in their leadership teams.

Non-listed companies: how the composition of each level of leadership compares with the 33% target



For non-listed businesses, more than half of companies are above the 33% threshold for Direct Reports, while over 40% have reached it on the Executive Committee. A third of relevant non-listed businesses have already reached the target at Board level. Across the FTSE 350 HTL, three companies have already achieved the 33% target across the key measures highlighted in the Hampton-Alexander Review – both Boards and Combined ExCo/Direct Reports. A further three appear to be at least on target to do so by the end of 2020. This means that 62.5% of FTSE 100 HTL and 85% of FTSE 250 HTL companies require a step change in diversity in at least one category (Board or Combined ExCo and Direct Reports) to achieve the 33% target by the end of 2020.

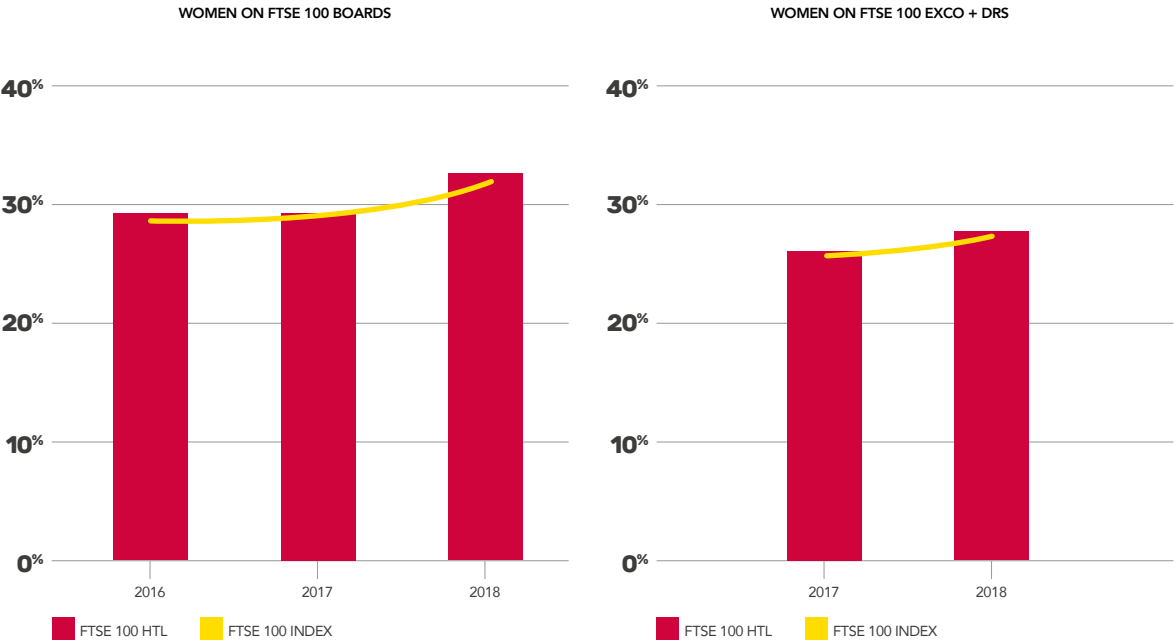
OVERVIEW OF NON-LISTED COMPANIES



COMMENTARY

1. IN NON-LISTED COMPANIES, GENDER DIVERSITY AT BOARD LEVEL LAGS BEHIND PLCs. THIS REFLECTS THE REALITY THAT THE MAKE-UP OF NON-LISTED BUSINESSES OFTEN PROVIDE FEWER STRUCTURED OPPORTUNITIES FOR 'OUTSIDERS' TO BE APPOINTED TO THE BOARD, PARTICULARLY IN PRIVATE EQUITY-BACKED AND FOUNDER-LED OR FAMILY-OWNED COMPANIES
2. HISTORICALLY, NON-LISTED BUSINESSES HAVE BEEN SUBJECTED TO LESS PUBLIC SCRUTINY, MEANING THERE HAS BEEN LESS OF AN IMPETUS FOR CHANGE
3. THERE HAS BEEN SIGNIFICANT PROGRESS IN THE POPULATION OF DIRECT REPORTS INTO THE EXECUTIVE COMMITTEE, WHICH OBVIOUSLY BODES WELL FOR THE FUTURE

FTSE 100



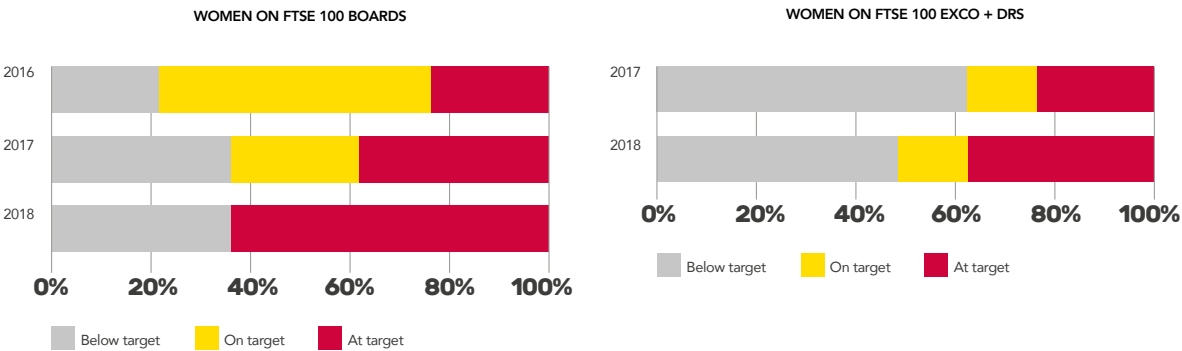
COMMENTARY

- 1.** HTL COMPANIES IN THE FTSE 100 ARE OUTPERFORMING THE INDEX AS A WHOLE ACROSS BOTH KEY METRICS (BOARD AND COMBINED EXCO AND DIRECT REPORTS)

2. FTSE 100 HTL COMPANIES ARE UP YEAR-ON-YEAR IN TERMS OF BOARD AND COMBINED EXECUTIVE COMMITTEE AND DIRECT REPORTS
- 3.** AT BOARD LEVEL, THE HTL SECTOR HAS VERY NEARLY REACHED THE 33% TARGET ALREADY, WHILE IT IS ON COURSE TO DO SO FOR COMBINED EXCO AND DIRECT REPORTS

4. FOLLOWING HIGH PROFILE ATTENTION ON THE INDEX OVER A SUSTAINED PERIOD, THE FTSE 100 COMPANIES IN THE SECTOR ARE GENERALLY THE BEST PERFORMING OVERALL

Tracking progress at company level



A number of FTSE 100 HTL companies have made significant progress in recent years. Nearly two-thirds have already hit the target of 33% women on boards in the latest Hampton-Alexander Review – up from a quarter in 2016. However, there is a widening gap between those who are performing well and those who are not. Those remaining companies are currently not set to reach the target by the end of 2020, unless they see a significant step change in the make up of their boards.

A similar picture emerges amongst the combined Executive Committee and Direct Report communities in the FTSE 100.

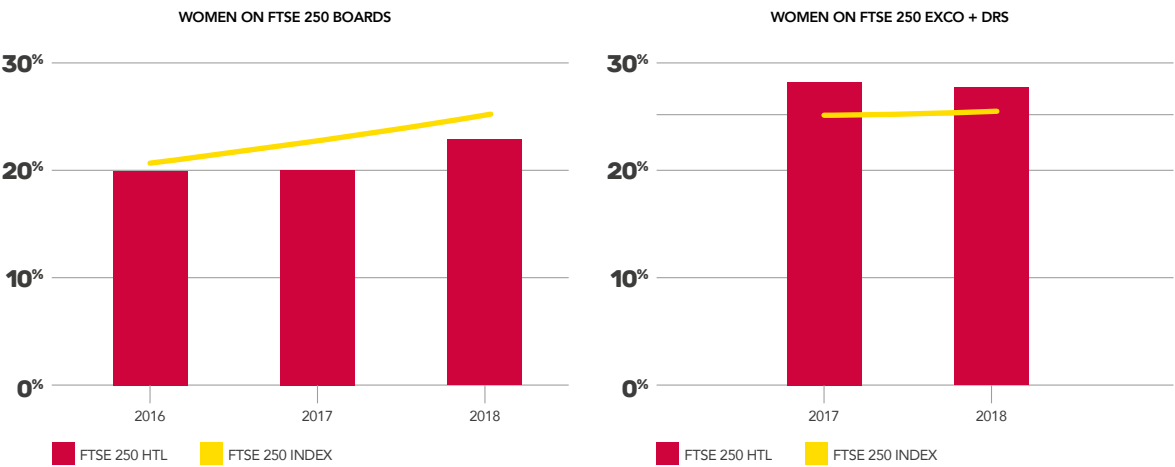
HAMPTON-ALEXANDER REVIEW COMPANY BY COMPANY - FTSE 100

| FTSE 100 HTL | % WOMEN ON BOARDS | % WOMEN ON EXCO + |
|---|-------------------|-------------------|
| Carnival | 27.3% | 17.9% |
| Compass Group | 27.3% | 33.3% |
| Easyjet | 33.3% | 34.3% |
| GVC Holdings | 22.2% | 25.3% |
| Intercontinental Hotels Group | 36.4% | 37.2% |
| International Consolidated Airlines Group | 33.3% | 22.0% |
| Just Eat | 22.2% | 26.9% |
| Paddy Power Betfair | 22.2% | 26.3% |
| TUI AG | 33.3% | 23.0% |
| Whitbread | 44.4% | 30.2% |

Below target On target At target

Source: Hampton-Alexander Review (November 2018)

FTSE 250



COMMENTARY

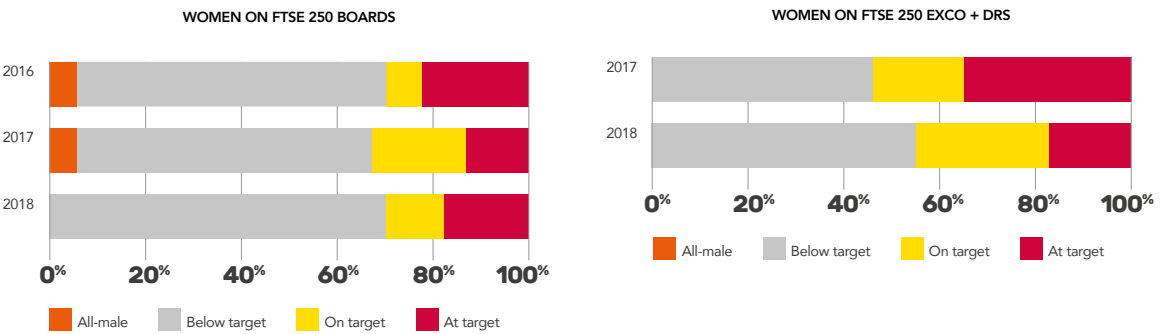
1. COMPARED TO THE FTSE 250 AS A WHOLE, HTL COMPANIES ARE LAGGING BEHIND THE AVERAGE FOR FEMALE BOARD REPRESENTATION, BUT ARE AHEAD FOR COMBINED EXCO AND DIRECT REPORTS

2. FTSE 250 HTL COMPANIES HAVE MADE PROGRESS ON WOMEN ON BOARDS, UP 2.6% SINCE LAST YEAR; THE PERCENTAGE OF COMBINED EXCO AND DIRECT REPORTS HAS FALLEN SLIGHTLY, THOUGH THIS IS IN PART DUE TO DIFFERENT COMPANIES LEAVING AND JOINING THE FTSE 250 INDEX

3. A STEP CHANGE WILL BE REQUIRED FOR FTSE 250 HTL COMPANIES TO HIT THE 33% BOARD TARGET BY THE END OF 2020

4. THE HAMPTON-ALEXANDER 33% TARGET FOR COMBINED EXCO AND DIRECT REPORTS WAS ONLY EXTENDED TO THE FTSE 250 IN 2017. THE FTSE 250 HTL AVERAGE IS VERY NEARLY WITHIN THE 'ON TARGET' RANGE TO MEET THE TARGET, BUT STEADY PROGRESS WILL BE NEEDED OVER THE NEXT TWO YEARS

TRACKING PROGRESS AT COMPANY LEVEL



For the first year, there are now no all-male FTSE 250 HTL Boards. However, the vast majority of companies (71.4%) are below target and the percentage of companies On or At Target has fallen this year. A healthier picture emerges for ExCo/DRs with 45% companies On or At Target, but this has fallen from 53.3% last year.

HAMPTON-ALEXANDER REVIEW COMPANY BY COMPANY - FTSE 250

| FTSE 250 HTL | % WOMEN ON BOARDS | % WOMEN ON EXCO + |
|-------------------------------|-------------------|-------------------|
| 888 Holdings | 16.7% | 26.7% |
| Cineworld Group | 33.3% | 40.9% |
| Domino's Pizza Group | 14.3% | 31.6% |
| El Group | 28.6% | New to Index |
| FirstGroup | 22.2% | 21.7% |
| Go Ahead Group | 28.6% | 26.6% |
| Greene King | 14.3% | 28.3% |
| Greggs | 42.9% | 31% |
| Merlin Entertainments | 44.4% | 24.7% |
| Millennium & Copthorne Hotels | 11.1% | 29.5% |
| Mitchells & Butlers | 9.1% | 42.4% |
| National Express Group | 16.7% | 29% |
| On The Beach | 20% | 48.5% |
| Playtech | 25% | 17.1% |
| SSP Group | 14.3% | 24.1% |
| Stagecoach Group | 20% | 15.4% |
| The Rank Group | 11.1% | 27.5% |
| Thomas Cook Group | 36.4% | 28.2% |
| Wetherspoon (J.D.) | 37.5% | 29.6% |
| William Hill | 25% | 26% |
| Wizz Air Holdings | 20% | 11.8% |

Behind the numbers

RESEARCH BY THE MBS GROUP

TRENDS, ANALYSIS AND THE VOICE OF THE SECTOR

Through the last quarter of 2018, The MBS Group conducted interviews with over 100 CEOs, Chairs or HR Directors at companies of scale across the Hospitality, Travel and Leisure sectors. Key themes that emerged during our conversations include the outlook for future progress, the need to elevate the diversity agenda to the Board agenda and progress in operations. We also explored some of the nuances different companies face, including ones borne out of company culture and the way businesses are structured. Finally, we look beyond gender to uncover the lack of ethnic diversity among the sector's senior leaders.

Turnover and appointment rates: the outlook for future progress

The Hampton-Alexander Review points to two key drivers of progress in gender diversity: the turnover rate of roles and the appointment rate of women. It's a simple fact that for gender diversity to increase, it can only happen when men are replaced by women or women are appointed into newly-created roles.

For some companies, this means there are opportunities galore with a number of existing senior male leaders set to retire in the coming years and a strong pipeline of female talent coming through behind them.

For other companies, the opportunities to drive significant change in the next few years could be few and far between. For instance, one pub company we interviewed reported that their predominantly male regional leaders were unlikely to move on in the immediate future and in fact the size of that population had just been reduced through a restructure.

To better understand the outlook for future change, we analysed the key roles on the Boards of HTL companies, where the shortage of women is particularly acute.

NEDS

M/F SPLIT IN FTSE 350 HTL BUSINESSES 2018



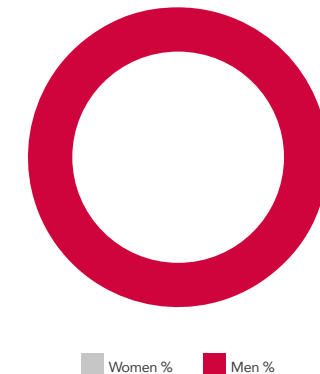
Starting with the positive news, the fastest pace of change can be found amongst the Non-Executive Director community. When you exclude Chairs, women already make up 39% of NEDs across FTSE 350 HTL companies. The UK Corporate Governance Code recommends a normal term limit of six years for non-executives and our analysis shows that nearly 42% of the current NED population will reach six years by the end of 2020.

Over the last five years, the appointment rate for women into NED positions in the HTL industry was 40%, across an average of 27 appointments a year. Excitingly for the future, there is an ever-increasing pool of available female non-executives to ensure momentum is carried through, although they may have very different experiences and backgrounds compared to their male counterparts. Two-thirds of the current pool of FTSE 350 HTL NEDs had no prior sector experience – and there are now 814 female NEDs across the FTSE 350 as a whole.

The evidence of progress amongst the NED population is encouraging. Across the FTSE 350 HTL companies at least, the 33% target has already been comfortably surpassed, and there is strong momentum for this to continue to rise. However, a more concerning picture emerges when you consider the key triumvirate of leadership roles: the CEO, CFO and Chair.

CHAIRS

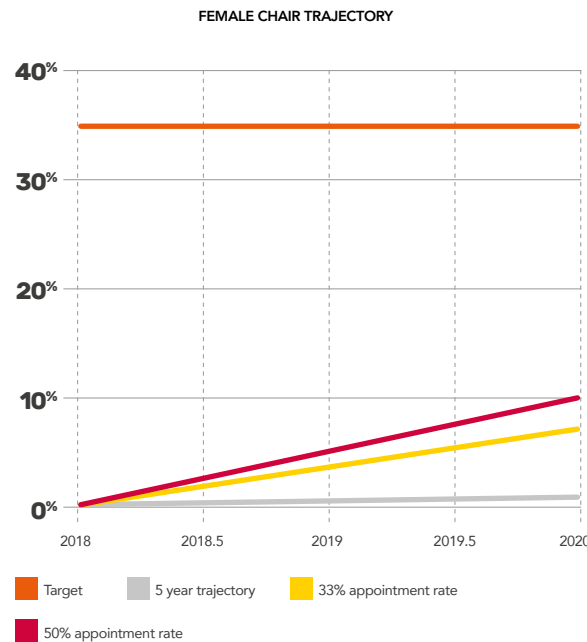
M/F SPLIT IN FTSE 350 HTL BUSINESSES 2018



Despite the increasing number of women in non-executive positions, the number of female Chairs remains stubbornly low. Amongst the FTSE 350 HTL companies there are no female Chairs, while across the index as a whole there are only 22 (6%).

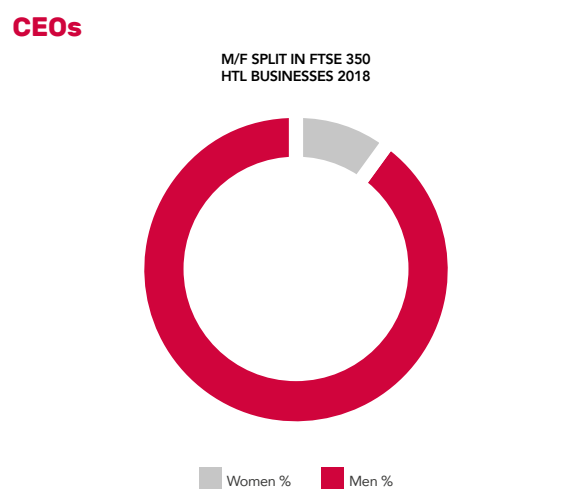
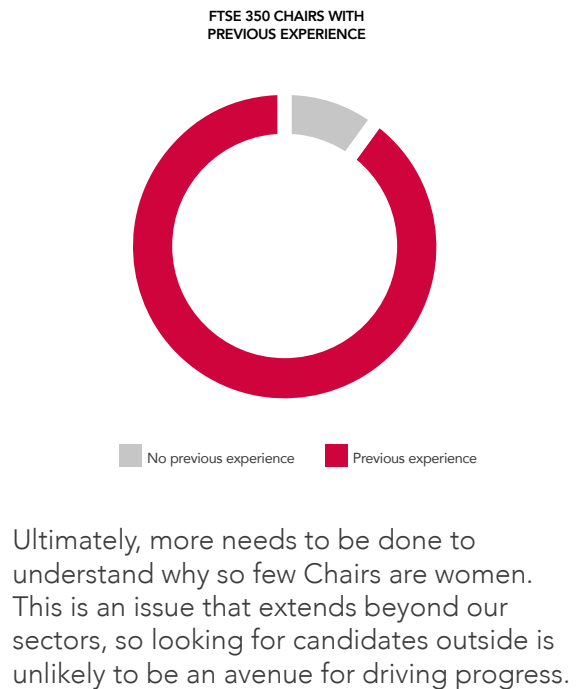
Over the last five years, the average appointment rate for female Chairs across the FTSE 350 has been 7%, with 14 appointments in total over the period. Assuming the same churn rate, even if every other Chair appointment in the HTL sector between now and the end of 2020 was a woman, the percentage of female Chairs would still fall well short of 33% – in fact it, would be less than 10%.

There are some female Chairs across the wider HTL sector – for example Debbie Hewitt at The Restaurant Group, which dropped out of the FTSE 350 in 2018, Karen Jones who was appointed Executive Chair at Prezzo last year, and Penny Hughes CBE, the Chair of FTSE SmallCap business The Gym Group – but it is clear the percentage is very low.

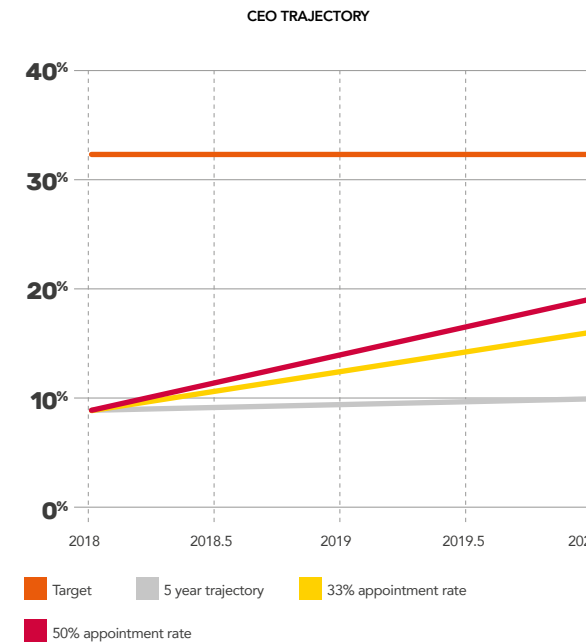


Our research shows that of the FTSE 350 HTL Chairs appointed over the last five years, just one of them did not have prior Chair experience. If we are to see a step change in the number of women chairing companies across the sector, businesses will need to be bolder about hiring first-time Chairs. Companies and senior female leaders should also be looking at other ways 'Chair' experience can be developed, whether that's through chairing Board committees, Joint Ventures or the like.

The role of the Senior Independent Director is often seen as a stepping stone to taking on a Chair role. Since the last WiH2020 review, there has been no increase in the number of female SIDs in the sector. Disappointingly, in the same time frame, none of these women have been appointed to Chair positions. In fact, when Dawn Airey steps back from her SID role on the Board of Thomas Cook in April 2019, the number will actually fall.



At 7%, the number of female CEOs of listed businesses in the HTL sector compares favourably to the FTSE 350 as a whole, where just 12 CEOs are women.



However, the reality shows just how vulnerable the statistics are for CEOs. It is ultimately a very small population, and so even individual changes can have quite a dramatic effect on the overall figures. For example, when Simon Smith formally succeeds Kate Swann as Group CEO of SSP after she steps down on 31 May 2019, assuming all else remains the same, the percentage of female CEOs will drop to 3.8% across the FTSE 350 HTL.

Looking outside of the FTSE index, there is a slightly larger pool of female CEOs in non-listed businesses in the sector, totalling 11%.



Leading from the top

In this report, PwC’s Jon Terry outlines the need for companies to build diversity into the business fundamentals – including through alignment with business strategy and providing clear direction, ownership and tone from the top – to turn good intentions into real progress. Our interviews demonstrated a clear need to elevate diversity onto the CEO and Board’s agenda if we are to see the step change in progress required.

Resources are limited in the sector. High labour costs, changing consumer habits and economic pressures mean the corporate centres of HTL businesses are often much leaner than in other sectors. Illustrating the point, one of the largest businesses in our sector explained to us that their budget is less than a tenth of what an equivalent business in financial services would allocate to tackling diversity.

Nonetheless, outside of the largest listed businesses, few companies we spoke to were able to point to a coordinated Diversity & Inclusion strategy and it was clear that in most companies the diversity agenda is still being driven by the HR Director – some of whom do not sit on the ExCo.

Particularly in smaller companies, a few of the CEOs we engaged with in this process took a defensive tone and automatically referred us to their HR Director for the conversation. For too many companies, diversity continues to be seen as an important issue, but one that necessarily takes the back seat to day-to-day commercial priorities – rather than one that presents a long-term commercial opportunity.

Likewise, outside the larger businesses, where CEOs, NEDs and investors are positively interested in diversity, too few are proactively driving the agenda or providing the Board-level oversight it requires. Meanwhile, the topic is largely not a priority for private equity investors, and therefore their portfolio companies.

However, over the last year, mandatory gender pay gap reporting has ensured the topic is on the agenda in a way it has not been before for non-listed businesses.

As the 2020 target looms ever closer, our research shows that lots of companies can point to bright spots in their gender diversity performance, but equally very few companies have achieved universally good results.

All companies need to do more to improve gender diversity in the key leadership positions in particular - with 87% of FTSE 350 HTL companies having an all-male leadership triumvirate of CEO, CFO and Chair.

To make real and lasting change, the diversity agenda must be elevated to the most senior level.

Driving innovation in operations

The operational nature of the Hospitality, Travel & Leisure sector is an obvious roadblock to gender diversity. Indeed, last year’s edition of this report highlighted this as one of the key reasons why gender diversity has been held back in the sector.

We therefore delved into the topic during our in-depth conversations with over 100 companies to see the current situation – and we were left encouraged by the proactive and innovative approaches many companies are taking.

Women in operations – being flexible out in the field

As one CEO observed, the nature of our sector makes diversity very difficult. Operational roles can cover large geographic areas and inevitably require significant travel. A relentless ‘always on’ culture pervades seven days a week, 365 days a year. More than most industries, the HTL sector is alive - often most active, in fact - at unsociable hours.

It is unsurprising, therefore, that HTL finds it difficult to attract and retain female talent within operations – particularly those with young families and women returners, for whom the work-life balance is so important.

This undoubtedly continues to be an area of the industry that needs to be tackled if we’re to achieve greater gender parity in the HTL sectors - as one HRD put it, ‘the real challenge is in ops’. For those companies that do have a strong pipeline of female operational leaders, the challenge is not losing them.

However, we were encouraged to hear about promising green shoots of progress as companies look at ways of innovating in ops. The first step for many companies is tackling the premise of an ‘always on’ culture. As one HRD asked, ‘large parts of our industry are built on part-time workers, so why can’t we have part-time managers?’

For example, one large pub group is piloting flexible working by introducing a call centre and buddy system to provide more centralised support out of hours, while another hotel chain is considering adapting General Manager roles to cover two sites as a small step to gaining early multi-site experience.

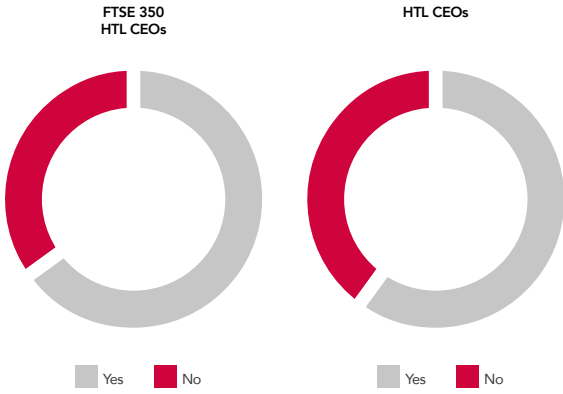
The challenge is not to give part-time managers fewer sites to oversee, but to provide better backup and find different ways to split responsibilities.

Operations preventing further progress

We know operations is a fundamental aspect of the business model for most parts of the HTL sector, and that there is a lack of women in operational leadership roles. So, is a lack of operational experience preventing women from progressing to the most senior leadership roles in HTL businesses?

Our research shows that nearly two-thirds of current FTSE 350 CEOs in the HTL sector have prior operational experience, while across the wider HTL sector, the split is slightly closer to 50:50.

CEOs WITH PRIOR OPERATIONAL EXPERIENCE



While previous operational experience isn’t an essential prerequisite for CEOs in the sector, it is clearly a distinct advantage.

Recognising that fact, as well as tackling some of the fundamental reasons behind the shortage of women in operations, a number of companies are also finding ways to cycle high-potential leaders in and out of the operations function to broaden their experience.

Culture and change

While progress is being made on gender diversity, we know there is a way to go. One of the most important elements is cultural change. A number of HTL sectors have large workforces working in functions that have traditionally been heavily male dominated and are still, to some extent, seen as ‘jobs for the boys’.

Sources we spoke to pointed to functions such as engineering, airline pilots, train drivers and cruise ship sailors. Even the newest disruptive tech-based businesses, for example in travel and gaming, face a similar challenge, with poor gender diversity in the technology-centric functions.

Some parts of our industry are also seen as being particularly ‘tough’ – especially those that form part of the night time economy where the work can be challenging and confrontational. Clearly women can thrive in such environments at least as well as men, but some HRDs we spoke to wondered what impact it had on the relative attractiveness of a career path in the sector. For example, it was pointed out that a pub manager in London can earn a very healthy salary of £45k – but are there easier ways of earning that in other sectors?

The HRD of one company described their business as a small, nimble and entrepreneurial organisation – something that is often attributed to the HTL sector as a whole – and yet they felt that they had not been creative enough in tackling diversity in the same way they might deal with other business challenges.

Ironically, one theme that emerged in our research is the idea that success in gender diversity can sometimes be a blocker to further progress. Where organisations already have women in key leadership positions, this can sometimes mean diversity is de-prioritised on the agenda.

For some in the sector, there is an additional layer of complexity that can impede progress: trade unions. Particularly in Travel, some companies report that it is difficult to drive change and adapt working practices that could boost diversity due to resistance from trade unions who are nervous of opening the door to other changes. It is notable, for example, that more success has been had in improving gender diversity amongst bus drivers – seen as a less political environment – when compared to train drivers.

Interestingly, we carried out a quick analysis of the National Executive Committees across a sample of trade unions representing our sectors, where we found that just 15% of their committee members are women.

Shining the light on invisible companies

From caravan parks to airlines, regional to global and online to multi-site, the HTL sector is broad. The diversity issues we face are similarly nuanced.

Airlines, for example, are tackling an acute shortage of female pilots, where 95% of the UK pilot population are men, while online businesses are struggling to attract female technology leaders.¹ For global businesses, diversity and inclusion itself is a more complex issue with differing and sometimes competing objectives in different parts of the world.

These differences show that there is no one-size-fits-all solution to improving diversity in the HTL sector. But it also provides opportunities to collaborate and seek out best practice in adjacent industries.

Public companies have been in the spotlight for a number of years, but there is now ever greater pressure on non-listed businesses – not least from the implementation of mandatory pay gap reporting.

In particular, many of the more ‘invisible’ company structures – such as founder-led or family-owned – have not faced much scrutiny in the past. Private equity-backed businesses are also yet to fall under the spotlight in a significant way.

Previous MBS research has shown that fewer than 10% of senior investment positions at private equity firms are held by women.² Speaking to PE investors for this report, we found that positive noises about gender diversity are not being translated into real action. Instead, funds remain singularly focused on the investment cycle.

The very nature of private equity means critical hires in portfolio companies tend to be made over a concentrated period of time and at pace. In other words, they are largely based on who is available at the time and comes with proven experience. Longer-term succession planning and people development does not tend to be high on the agenda, particularly in smaller companies.

Furthermore, with such a gender divide in the investment community, it is inevitable that private equity-backed companies will struggle to improve gender diversity on the Board with relatively few seats going to independent non-executives.

While the headline figures are important, it can also be intimidating for companies that are behind on their diversity agenda looking for somewhere to start. This is why initiatives like WiH2020 are so useful, providing opportunities for collaboration and making small steps in the right direction.

¹ British Airline Pilots’ Association (BALPA) Media Centre, ‘Pilots’ association says gender shouldn’t be a barrier to becoming a pilot’ (March 2018)

² The MBS Group, ‘The Case for Gender Diversity in Private Equity’ (February 2018)

Do we also need to focus on ethnic diversity?

From the Davies Report to the Hampton-Alexander Review, and the 30% Club to mandatory pay gap reporting, gender diversity has been under sustained scrutiny for a period of over eight years now.

That pressure has already delivered real change with gender diversity on FTSE 100 Boards up from 12.5% in 2011 to over 30% today, though of course there remains a great deal of work to do.³

| MCGREGOR-SMITH BAME WORKING AGE POPULATION | MCGREGOR-SMITH BAME LEADERS | BAME HTL LEADERSHIP | BAME HTL BOARD | BAME HTL EXCO | BAME HTL DIRECT REPORTS |
|--|-----------------------------|---------------------|-----------------|---------------|-------------------------|
| 1 in 8 12.5% | 1 in 16 6.25% | 1 in 33 3% | 1 in 56 1.8% | 1 in 50 2% | 1 in 27 3.75% |



Baroness Ruby McGregor-Smith CBE

The McGregor-Smith Review of Race in the Workplace (2017), presents both the business and moral case for developing Black, Asian and Minority Ethnic (BAME) talent in the workplace. The fundamental right of every individual to fulfil their potential in the workplace has been accepted for some time, yet employers’ verbal commitments to racial inequality have yielded few results. The McGregor-Smith Review aims to spur employers (especially PLCs) into action by highlighting the economic benefit of embracing racial/ethnic diversity. Indeed, the BEIS Analysis from 2016 estimated that the British economy could receive a £24bn lift from the full utilization of BAME talent.

The Baroness’s independent review received a follow-up report in 2018, which produced an insight into BAME employees’ experience

of race in the workplace – for example, the struggles that ambitious BAME people face in securing opportunities to use their talents. The report concludes by emphasizing the need for employers to take action with regards to inclusive leadership, opening a dialogue with employees, and investigating the relationship between ethnicity and pay.

A ROADMAP TO SUCCESS:

- 1 Gather data
- 2 Take accountability
- 3 Raise awareness
- 4 Examine recruitment
- 5 Change processes
- 6 Government support

³ The Hampton-Alexander Review, 'FTSE women leaders. Improving gender balance in FTSE Leadership' (November 2018)

The ethnic diversity data presents a bleak picture – and one that we suspect is better than the reality. Many companies were unable to provide us with accurate data on ethnic diversity, as they simply don’t know it themselves. With the potential of mandatory ethnicity pay gap reporting on the horizon, we discussed the issue of ethnic diversity in detail with leaders in our sector. Some of the key themes that emerged are laid out below:

1. What gets measured gets done

Phase one in the McGregor-Smith Review’s Roadmap to Success is to gather data. As we know, ‘what gets measured gets done’, and our interviews showed that most HTL companies simply don’t have the data to drive the necessary change. Some companies were unclear on the legal issues of holding such data, while others have an incomplete picture – for example, data is missing for long-standing employees, or those who have chosen not to disclose their ethnicity. In some of our interviews we found a reluctance to discuss the issue for leaders who don’t have a real handle on the issue. The first step must be to really understand the scale of the problem.

2. Role Modelling and the relative attractiveness of the sector

Last year, Business in the Community (BITC) unveiled its 2018 Best Employers for Race list. Amongst the 70 companies identified, the HTL sector was conspicuous by its absence. This mirrored a sense amongst our interviewees that the sector is perhaps seen as less attractive than others where action taken on ethnic diversity has been more visible – such as professional services, financial services and the public sector. In some of our sub-sectors, there was a sense that the serving of alcohol is also a factor in making our sector less attractive to certain religious groups.

Another CEO in the sector described their customer base as being predominantly ‘White British’, which was therefore reflected in their workforce.

3. Opportunities in franchising

According to figures from the British Franchising Association * around 80% of franchisees describe themselves as white British, suggesting that ethnic diversity is more advanced in franchise businesses than in corporate management teams.⁴ Is there an opportunity to recruit better from within the franchise base?

4. International

Anecdotally, we found that the more international businesses we spoke to – particularly those with exposure to the US market – tended to be more advanced on the ethnic diversity agenda. Diversity objectives are more complex in these businesses, with different aims in different markets, but these companies are able to learn from successes in other territories.

5. Local demographics

While many HTL businesses’ leadership teams don’t reflect national diversity figures, several reported that their head offices reflected the local population from which their employees are drawn. One company saw diversity reduce significantly when it moved its head office from West London to the City of London. The prevalence of head offices based in areas that tend to have a less diverse local population potentially suppresses the availability of senior diverse talent to draw on in leadership roles.

⁴ Elite Franchise Magazine, ‘Why diversity matters for franchises’ (March 2016). Available at: <http://elitefranchisemagazine.co.uk/people/item/why-diversity-matters-for-franchises>

WiH2020 Work Streams: collaboration in action

BY JOANNA AUNON – WiH2020

BY THE INDUSTRY,
FOR THE INDUSTRY

The publication of the first WiH2020 report in 2018 provided a never before seen sector-wide insight into the barriers and opportunities that exist to progress women to the very highest levels within the industry. Key themes that arose included the need for companies to view Diversity and Inclusion as a business-critical issue and be able to measure their performance against clear metrics. The report also identified the need for a more effective and innovative approach to finding and developing talented women, either internally or from other industries, to fuel a pipeline to the most senior positions. The lack of support for women returning from career breaks was also cited as a reason for the dearth of women at the Executive and Board level.

As highlighted in the 'Leading by example' section of this 2019 report, there are pockets of great practice from individual companies, mainly from the FTSE 250 and above. However, meaningful progress across the sector will remain minimal and slow unless organisations are able and willing to work together and share from their learnings for the benefit of the wider industry.

One of the WiH2020 priorities in 2018 was therefore to actively address the highlighted barriers to success through the creation of the five work streams below within the WiH2020 HR Leaders steering group:

1. Data metrics & measurement
2. Talent pools
3. Cross-industry mentoring
4. Best practice
5. Women returner programme

The purpose of the work streams is to identify tangible solutions and output that could be adapted and used across the sector regardless of the organisation's size or where they are in their Diversity and Inclusion journey. Critically any solutions or recommendations would take into account the operational and resource challenges our industry faces.

In summary, all of the solutions would be created by the industry for the industry. Below is an overview of each work stream by the leaders of each group.

Over twenty companies from across the sector are now actively involved with the work streams. Collaborating with other companies from across the sector has proven to be an enlightening and rewarding experience for each of the organisations involved. Most importantly, the groups have come together to produce the beginnings of robust tools and resources that can soon be used across the sector to support organisations in moving the dial forward far more quickly than if the industry continued to work in silos.

In this chapter, the work stream leaders give an overview of each group and describe examples of some of the outputs that have been created. The resources detailed will be available on the WiH2020 website in 2019.

Data metrics & measurement



Catherine Taylor
Stream Leader, Group People
Director, Marston's

The remit of the group was to assess the data underpinning the diversity challenges within our organisations, specifically defining useful data around talent pools and pipelines and defining a dashboard of metrics that will generate relevant insight. Related to this were also measures of success, including how an organisation can use the data already generated by relevant governance requirements to move the dial forward. The shared commitment to the topic has provided both ideas and energy for tackling such an important area.

We were very aware that as a cross section of the sector we were all at different places of evolution on our diversity journey. Rather than being a disadvantage this enabled those with a less well-developed, approach to learn from other members in the group. Regardless of our evolution, the similarity of the challenges experienced provided an opportunity for validation of the issues we are all trying to address.

Given the essential need to ensure that work on diversity must be very relevant to individual organisations, we were careful not to prescribe specific solutions, rather providing a framework and options that others can take from to develop and meet their own business needs.

We have a detailed paper which outlines overarching principles in defining data, potential data and metrics to include, top tips on building a dashboard, as well as target setting. The paper demonstrates that core data will enable an organisation to make some clear decisions around priorities, risks and goals on their Diversity & Inclusion approach.

Many organisations will bemoan the lack of information and their system capability to provide comprehensive and reliable data. This itself tells a story of a risk or a goal to improve, however there is wider data available that is a measure of an organisation and will help to demonstrate a "state of the nation" and should form the basis of a company's D&I focus and resulting strategy. Examples of the data to collect are shown overleaf, a full overview of recommendations will be available on the resources section on the WiH2020 website.

EXAMPLE DATA TO COLLECT

| | |
|---|--|
| EMPLOYEE DEMOGRAPHICS | <p>Understand the make-up of your organisation and cross-reference this with any external data that you can research such as the census (remember, this data is gathered every 10 years).</p> <p>If your HR systems have gaps, scan the internal environment to understand what other information is out there to help fill those gaps - for example, a pulse or engagement survey. These types of surveys should be anonymous to encourage disclosure of sensitive information.</p> |
| RECRUITMENT DEMOGRAPHICS | <p>Does discrimination or unconscious bias exist within your recruitment processes?</p> <p>What language do you use on your recruitment website? Examine your recruitment statistics to establish if there is a “drop off” through the recruitment process? Most ATSs have some form of analytics available to aid the research.</p> <p>If you are working with agencies, what instructions have you given them? Do you, for instance, insist on gender-balanced shortlists?</p> |
| LEADERSHIP SPECIFIC DEMOGRAPHICS | <p>Taking an objective look at the diversity of your leadership and management team will inform your plans.</p> |
| PERFORMANCE DATA - APPRAISAL /INTERNAL PROMOTIONS | <p>Review your appraisal data, internal promotions and applications for internal development programmes in order to highlight any patterns and insight.</p> |
| INCLUSION INDEX | <p>Understanding your workplace culture and behaviours that impact your organisation can show in many different guises.</p> <p>Identify a number of questions (minimum of 4-6 questions) that can help you to measure progress, where your hot spot areas are and where you need to progress knowledge and learning programmes. See the following example.</p> <p>Surveys in general also allow you to pull out good practice. It is also good practice to ask for anonymous Diversity Information from individuals, explaining how this data is going to make an impact</p> |

EXAMPLE OF AN INCLUSION SURVEY

| QUESTION | NO | YES | PREFER NOT TO SAY | YES, BY MANAGER | YES, BY A COLLEAGUE |
|--|----|-----|-------------------|-----------------|---------------------|
| I feel I can be myself always at xxx | | | | | |
| My manager role models our values and ethics in their day to day work | | | | | |
| My manager treats everyone in our team fairly regardless of their individual differences | | | | | |
| I am proud to tell others I work at the xxx | | | | | |
| I feel my personal safety is protected at work | | | | | |
| My manager’s manager creates a climate where colleagues can voice opinions and be heard | | | | | |

Talent Pools



Suzanne Peacock
Stream Leader, Group Talent & Development Director, Merlin Entertainments

The challenge is one of both attraction and retention. We need to attract more female talent to the sector and stop losing valuable talent to other industries by demonstrating that the HTL industry is a great place to work and that it is possible to have a fulfilling career. Doing this will provide a broader base of talent to hire from and address key talent shortages across our industry.

Given the above, the work stream met several times to agree how best to work together to address some of these key challenges and support women’s development and career progression. There is a significant benefit from employers coming together to collaborate on key initiatives to attract and recruit more talent into the HTL industry – including widening the start of the funnel by attracting school leavers and graduates.

We recognised that each organisation may be at a different stage of maturity, so one of the projects we have agreed to take forward is to create a ‘practical guide to building female talent pools’ for employers within HTL to help them progress based on where they are at currently. This guide will include best practice examples, suggestions, ‘how to guides’, templates, case studies and contact details for further information to learn and benefit from the experience across employers. An example is ‘How to develop a culture of flexible working’.

Additionally, we believe there is huge value to be had from ‘marketing’ the HTL industry and demonstrate the wide and varied (and fun and interesting) career paths that exist in our industry, especially those unique to our sector. Changing the current perception of the HTL industry – identify and address negative perceptions whilst shouting about what’s already great – is something that we believe we can work on collaboratively on to attract more talent to our industry. The resources created can then be used by any employer from early careers to senior hires to demonstrate all the great things about the HTL industry, with a particular focus on attracting more women to the sector.

This year, we will launch the ‘Diverse Careers in HTL’ video that will showcase the diverse opportunities available across the industry, from entry to Board level. This is the first tangible project we will have launched since the WiH2020 collaboration platform was created. Over ten companies across the industry have joined resources to make this happen.

Cross-industry Mentoring



Estelle Hollingsworth
Stream Leader, Vice President, Talent & Development, Virgin Atlantic Airways and Virgin Holidays.

The cross-industry mentoring work stream focus is on providing a mentoring programme for women who are currently at ‘middle management’. The reason to focus on this population was to help build and strengthen the talent pool, for roles at Executive Level beyond the HR function, and thereby strengthen the pipeline to a Board appointment. The core aim of the programme is to build the following for women at this level:

- Aspiration
- Network
- Confidence

The previous WiH2020 report highlighted that there is a distinct lack of senior female role models for women to aspire to replicate. Therefore, the proposed mentoring programme firstly aims to help offset this gap by matching mentees with senior mentors from a cross-section of organisations within the HTL industry who, will provide not only practical support and guidance but hopefully also inspire participants to aim for the highest level in their careers. Secondly, by pairing mentees with senior leaders, the programme will also support their confidence by building ‘upwards’ relationships. Finally, by pairing mentors and mentees from different companies across the sector, participants from both sides will gain a wider insight into the sector and develop their own learning, but also help to develop the mentee’s network.

Best Practice



Steve Ryan
Stream Leader, VP HR Consulting Hilton

The group felt that in addition to producing tangible solutions, it was also critically important to take this opportunity to provide some guidance for companies on creating ‘energy and excitement’ about D&I as the building blocks for best practice and engage a wider audience than solely HR.

Working within a group with several different companies in similar but different sectors has provided a great learning opportunity for all involved. The breadth and depth of the knowledge and research shared by the group has created the foundations of tools and resources that will provide benefit to a wide range of HTL companies.

The group is aiming to create a reference guide that provides guidance on diversity and inclusion best practices, which is both user-friendly and engaging to read. The guide will be aligned to the current challenges and changes in the working environment and culture of HTL companies. The aim is to create varying levels of advice, where the reader can ‘pick and mix’ their approach and customise the solution which meets the needs of their individual organisation. The document will reference the levels of ‘Good’, ‘Better’ and ‘Best’ and will highlight ‘quick wins’ and best practice case study examples provided from within our group or from research.

Below is an example included in the guide that showcases the ‘Best’ level and what organisations that aspire to reach this level should be doing to incorporate D&I within the very heart of the company and embrace market-leading practices.

LEADERSHIP:

- The most successful companies have a collective leadership team that supports a culture where diversity and inclusion is central to doing business and consider the D&I impact of all business decisions. Leaders also actively talk about the D&I agenda and become personal sponsors and advocates both internally and externally.
- Coaching, mentoring and sponsorship opportunities are provided, either from more senior members of the leadership team or through external networks.
- The most effective organisations ensure an individual is accountable for the delivery of a company's D&I strategy and action plan.
- Forward-looking organisations see extended longevity and population aging as an opportunity. The longevity dividend enables companies to address a societal issue and tap into a proven committed and diverse set of workers.
- Leading organisations should be developing innovative practices and policies to support extended careers. Open collaboration between business leaders and workers aiming to tackle shared challenges such as age bias and pension shortfalls.

CULTURE:

- Leading companies build a culture of respect where people are empowered to succeed whoever they are, where difference is valued and everyone can be themselves at work.
- Stakeholders taking an in-depth look at the organisation's impact on society, for example how it affects the community and how employees feel about their job.
- Proactively implementing regular and innovative training to reinforce the culture and help support the organisation's D&I agenda. This could include unconscious bias training to ensure that the workforce embraces how to create a fair and inclusive environment for all workers.

HR PROCESSES & POLICIES:

- The use of HR data in monitoring progress is essential to support leadership in decision-making and tracking progress against the D&I strategy and action plan. Leading organisations will also regularly review HR policies and processes from the perspective of bias and put in changes and interventions to remove or actively manage any bias. For example:
 - Organisations leading the way will develop specific recruitment strategies to remove unconscious bias and promote inclusion through their employer brand to attract diverse talent.
 - Forward-thinking companies establish reward systems that offer a variety of rewards and ways to personalise, to meet the diverse needs and desires of a diverse workforce. This brings a distinct advantage in attracting and retaining talent.

DEVELOPMENT:

- Creating and supporting workplace policies to increase advancement for all.
- Supporting 21st century careers, by developing and implementing a variety of solutions to increase diversity, with a focus on experiences, new career models, data driven tools and Learning and Development.
- Providing opportunities for external development programmes that support the growth of female leaders – focused on targeted mentoring / coaching for female leaders.
- Creating processes which support the need to continually evolve the way talent is engaged within the organisation, ensuring the diversity agenda is a priority.

REPUTATION:

- Advanced organisations create positive perceptions of their culture, identity and treatment of customers and employees. They do this by leveraging all channels, especially through technology such as social media platforms and company websites. What a company does and says about D&I from a wide range of channels, from press releases to a CEO's external and internal profile, is integral to the authenticity of an organisation's commitment.
- The use of internal channels such as an intranet or internal social platforms is vitally important and should be regularly used to showcase actions taken and progress made with the D&I agenda.

The programme will be the first cross-sector Returners programme of its kind and over fifteen companies have already agreed to take part. The programme is incredibly comprehensive and includes face-to-face and online training for the participants, as well as senior mentors to support them and build their confidence. Training for line managers is also provided to enable flexibility and organisational culture change.

A successful programme will help to improve the current negative perception of the sector to potential women returners, opening a previously untapped pool of talent. Most importantly, the outcome of the programme will be a resource and template for companies across the sector to use time and time again, either as a stand-alone venture or as part of future WiH2020 collaborations. Details of Comeback to HTL can be found on www.comebacktohtl.com.

Women Returners Programme



Tea Colaianni
Programme Leader,
Chair WiH2020

The HTL sector is facing a challenge with the attraction and retention of women in middle/senior management, which directly impacts the health of the talent pipeline of female representation at Board level. WiH2020 research shows that women's perception of the sector is one of inflexibility in accommodating changing needs of its employees (career breaks for family or caring) and of a 'laddish' culture. Therefore, Comeback to HTL, the first ever cross-industry Women Returner programme has been created to start addressing these barriers for women to return to the industry after a career break.

What is next?

The WiH2020 work streams are an integral part of the success of cross-industry collaboration. As highlighted earlier, progress has been made in certain areas but there remains a huge amount to do to make a sustainable difference. The work stream initiatives have been designed to be flexible and relevant and will adapt to maintain momentum on existing topics but also ensure a focus on any new areas highlighted by the results of this year's research. All the materials produced by the work streams will be available on www.wih2020.com.

Views from the industry



Jane Bentall

Managing Director, Haven Holidays,
Bourne Leisure

Jane Bentall is managing director of Haven Holidays and former group finance director at Bourne Leisure.

Jane has over 19 years of experience operating at the highest levels of the hospitality industry. She's also a chartered accountant, with a passion for delivering outstanding guest experiences at Haven, which welcomes over 2.5 million visitors per year.

Tell us about your background – how did you end up working for the likes of KPMG and Rank?

I came from humble beginnings, went to a local comprehensive school, and was the first person in my family to go to university. My mother wanted me to be an accountant – she felt it was good to have a professional qualification to fall back on. After I got my master's degree, I took a year off to see the world. I had a job at KPMG in Cambridge to go back to afterwards. I moved to KPMG's strategy department in London as a secondment, where I felt there would be more opportunity. My time there included a piece of work for Rank and on completion, Rank offered me a job in M&A.

What was it that tempted you to join Rank and where did you go from there?

I was fascinated by working with a variety of brands and I thought I could genuinely make a difference. Rank was the first big business I knew that was all about its' guests – it was the people element that fascinated me.

We worked with Bain on a big strategic review and the conclusion was to sell a large part of the business to Bourne Leisure. I met Bourne's founders - the 'old boys' - while working on the deal, and they asked me to come and be an operations director running their caravan parks.

I'd fallen in love with the business – and realised that I didn't know anything about the real nitty gritty of running something, so I saw a move into operations as a chance to get closer to the guest.

And how did you balance moving into an operational role, with having a family at the same time?

I told John Cook, one of the founders, that I was expecting a baby and that it would be impossible to do a nationwide operations role and look after a young family. John said they would make it work for me – even telling me to use the company helicopter to ensure I could get home daily for bedtime! They also promised that I could work flexibly. I was able to take my kids with me all over the place - they were well looked after by the parks I oversaw. It was amazing.

When I came back from my second maternity leave, they were true to their word: they enabled me to work three days a week and moved me from an operations role to become the group finance director, so I could be closer to home.

Why do you think they took such a progressive approach?

John created a small group of people around him who he trusted – and he invested heavily in those individuals. When he identified someone who he thought was a good fit – no matter their gender or ethnicity – they were hugely loyal. Once you were in, you were in the family – and you make things work for family.

The 'old boys' recognised that the decision-maker for holidays and caravans was often mum. Therefore, from a commercial perspective, it was critical to have powerful female voices at the table. The three founders realised they were getting older – and bringing me in with young children, as a young mum – gave a different viewpoint. In fact, I was one of several women involved in shaping the company in that early era. Later, we brought in 'Pretty Little Head' to understand in more detail how women buy and to ensure the voice of women was properly heard in the business.

What more does the sector need to do to attract and retain women?

Having children is a transition point. As a company, you need to find very practical solutions to enable women to return to work after a baby. If you take a long-term approach to talent, including investing in women during critical periods, you ensure that the best people want to stay with you.

Views from the industry



Zoe Bowley

Managing Director UK & Ireland, PizzaExpress

Zoe Bowley is managing director of PizzaExpress UK & Ireland. She joined PizzaExpress in 2009 and has been a member of senior management since 2011.

She was promoted from chief operating officer to MD, UK & Ireland in September 2017 where she leads the UK & Ireland team of over 470 restaurants and 11,000 team members.

Her career in the food and leisure sectors started in 1994 and she has worked for Allied Domecq, Whitbread and Weightwatchers (now WW).

Can you describe how PizzaExpress approaches gender diversity?

Personally, this is an area I have always been passionate about and have always campaigned for in our business.

PizzaExpress tackles diversity in an understated way. We don't shout from the rooftops about it, but it does underpin our strong code of values.

We look at three things when hiring into leadership roles, and this seems to have served us well in creating a diverse workforce:

- Are they bringing a level of functional expertise?
- Their ability to lead and make an impact of the business
- Their ability to step out of function and work at a more strategic level

To attract more women, and this goes for the whole industry, flexibility also needs to be there. Gone are traditional ways of working, and I stamp that right through the organisation. These days, it's just as important to provide flexibility for men as it is for women - it's much more productive to provide flexible working patterns that make everyone, no matter their lifestyle, feel as though they can progress in their career.

When you were still making your way up the ladder, who were you inspired by?

That's a tricky question since I've never worked for a female! There were literally no female operations managers when I was coming up in the ranks. I was also in pubs for a bit, which was even worse! That being said, I imagine that I've made my bosses pay closer attention to female talent.

In terms of role models, I've always admired Angie Risley, now Sainsbury's Group HRD. I always felt supported by her in my years at Whitbread. She's always been a force for good and she's great at spotting and bringing talent through.

Who else do you think is doing interesting work in gender diversity?

Pret are always up there, as are Nando's and Whitbread.

Time and time again, these companies have demonstrated their commitment to being inclusive employers. Whereas, other companies shout about it, but once you kick the tyres, their commitment is not nearly as robust as you think it might be.

Views from the industry



Johan Lundgren

Group Chief Executive Officer, easyJet

Johan joined easyJet as CEO in December 2017. Prior to the airline, he was Deputy Group CEO and CEO of Mainstream Tourism at travel group TUI AG. He previously held a number of senior leadership roles with TUI, including as MD of Northern Europe and CEO of TUI Nordics.

With an acute shortage of female pilots right across the airline industry you have set an ambitious target that by the end of 2020, 20% of new entrant pilots at easyJet will be women. What steps are you taking to meet this target?

When we launched the initiative to attract more women into a career as a pilot in October 2015, women only made up 6% of easyJet's new entrant pilot intake. As a result of the work we have done since then I am delighted that in 2018 we reached the milestone of 15%, firmly on our way to our goal of attracting 20% women by 2020. Additionally when we set out the goal, we expected that 20% would equate to 50 female pilots, however owing to our growth, we have attracted more than 50 female pilots this year and now have more than 200 female pilots flying for easyJet.

We are taking a number of different steps to meet this target and attract more women into this highly rewarding profession. To date this has included high-profile social media campaigns to change perceptions around the career and also practical initiatives like underwriting the loans of some of the female pilots. We also recognise that we need to provide role models for girls and women of all ages as the perception is that this is a male profession. As such, many of our pilots undertake school visits to provide a female role model, with more than 100 undertaken in the past year alone. We also have a partnership with Girlguiding which provides us with the opportunity to introduce 200,000 girls aged between seven and ten to aviation who can undertake the first easyJet sponsored Aviation Badge. I believe no other airline is doing more on this than easyJet.

What is easyJet doing to promote diversity throughout the rest of the organisation?

Our People team have spent a lot of time reviewing our current policies and processes to understand what we currently do and to develop a more in-depth strategy and series of actions on Diversity and Inclusion. This has also included asking for our people's perspectives on what it's like to work here as well as what we can do differently to create a truly inclusive and diverse workplace. This strategy will help us to build on the great work already underway – like the Amy Johnson initiative – and think about how we can further improve ourselves as a young and progressive airline that wants to maximise the power of our people.

Highlighting your personal commitment to the diversity agenda, when you joined easyJet you notably asked the Board to reduce your pay in line with what your female predecessor Carolyn McCall received. What motivates you personally to make diversity such a priority?

I took that decision to demonstrate my personal commitment and I think it is crucial that an issue as important as diversity is led from the top. I want easyJet to build on what we have and to go further to create an environment where people can be themselves at work and where diverse talent can flourish. I think this is critical to our success as a business and it's also the right thing to do to encourage a diverse workforce that reflects the passengers we fly and communities we serve.



Views from the industry



Jillian MacLean

Chief Executive Officer, Drake & Morgan

Jillian MacLean is founder and CEO of Drake & Morgan, which consists of 23 bars and restaurants in landmark locations across London, Edinburgh and Manchester. She spent the majority of her early career in a variety of different roles at Mitchells & Butlers, most notably as operations director.

Jillian has received several industry accolades for her work with Drake & Morgan, which she launched in 2008. In 2013, she was awarded an MBE in the Queen's Birthday Honours List 2013, for services to the hospitality industry.

What's the key to attracting and retaining new talent in hospitality?

Good question!

Hospitality is an industry that requires you to juggle a lot of different skills all at once. It's also a great place to pick up lots of life skills, which is a huge benefit for millennials just starting out. It's an atmosphere where social interaction is a must, which undoubtedly leads to lasting social networks and life-long friendships. However, the new generation have to be prepared to work hard – hospitality is not a walk in the park.

To attract and retain younger people, we have to provide them with the right space to try things out. We need to give them the freedom to try, fail and succeed as part of a helpful and welcoming team. That's where all the best ideas come from – being part of a team. I've always thought that the role of operational leader is 85% following a template, and 15% the chance to 'play' – to try new things for the customer, to experiment and to push boundaries. You only learn by trying different things – not just following the playbook.

Is there a better way hospitality can appeal to more women?

Women value collaboration. We need to promote that and show them it does exist in hospitality. The nature of our work means that it has to. We should also work on creating a networking system for young women to develop their skills and confidence – an informal approach to mentoring is the key.

How would you recommend the industry tries to improve gender diversity?

Well from my experience, quotas are definitely not the answer. People should always be awarded roles based on merit. Otherwise we're doing them a disservice.

I think we can learn from the banking and retail industry – these sectors are bounds ahead. But hospitality is more complex. For example, in retail a company might do a stock take twice a year – in hospitality, it's more like week to week.

It's also important to create an environment that is humble, low on ego and collaborative – and you have to back your people. Celebrate their successes and help them learn from their shortcomings.

Is this what you experienced at Mitchells & Butlers?

Yes, the culture there was incredible. At Mitchells & Butlers it was never about being a woman. You were awarded roles on merit. I never experienced a glass ceiling or any sexism.

You were trusted, empowered – and there was an excellent feedback mechanism. They really wanted you to get to the next level. The training was great – both formal and informal.

Once you got more senior, they gave you autonomy, and space to try new things. Ideas came from the team and often silly little things became big concepts. The best ideas always come from teams. It was an amazing grounding for me.



Views from the industry



Ann-marie Murphy

Director of People and Development,
The Gym Group

Ann-marie is director of people and development at The Gym Group and non-executive director of Wandle Housing Association.

In 2015, Ann-marie was appointed as group HR director for New Look, prior to which, she spent 12 years at TUI and held roles such as head of HR for retail and overseas operations and Sector HR director for the global specialist portfolio business.

What is The Gym Group doing to promote gender diversity?

One of the most important things we're doing is actively identifying the women in the business that have the aspiration and potential for progression.

From talent benchmarking, we have found that there are people in the business with masses of potential but who lack the confidence to put their hand up for senior roles. Now we are working hard to identify these employees and, with coaching and support, make sure they can reach their potential.

We have a great culture and a lot of people have flexible working. We are keen to extend this as I firmly believe you shouldn't have to choose between being a good mum and being a good leader!

Why do you think there are so few women in senior leadership roles in the sector?

I'm not saying it's the only factor but, like any sector, flexibility of the working environment is always going to play a part. It's often the fear that any flexible working will restrict the opportunities for progression.

I am currently the only women on the executive team at The Gym Group, so my appointment is a step in the right direction. This can also be a challenge to make the break into the senior team if it is currently mostly or all men. I have to say that it didn't bother me, I knew before I joined that I would need to make sure I picked a culture where diversity was on the agenda and where I knew I would be able to break through.

In the past, attracting and retaining women has proved difficult for the industry. Is there a better approach?

At New Look, we invited influential women to come in and talk about their careers and journeys. I think women helping other women is really important.

I firmly believe that women should support and empower other women.

And what about black and minority ethnic (BAME) candidates? Is there a better way of attracting them to the industry?

I think it needs the same approach it has taken to drive gender diversity – doing the research to understand what the barriers are. We need to be realistic, take appropriate steps to address issues and challenge the limits that are already in place. These are our values and they lend themselves nicely to encouraging diversity in all forms.

Overall, you have to be clear that being part of the gender or diversity spectrum should not limit your opportunities in any way. Everyone must have fair opportunities.

Views from the industry



Karin Sheppard

Managing Director Europe, IHG

Karin Sheppard is managing director for IHG across its European business.

Karin is responsible for driving the sustainable long-term growth of IHG and the performance of its European hotels. She brings more than 15 years of IHG experience and more than 20 years of broader international experience across technology, telecommunications and hospitality.

Prior to her current appointment, Karin served as chief operating officer of Australasia and Japan, leading the operations and performance of close to 70 hotels. In her three years as COO, Karin oversaw the market debut of the Holiday Inn Express brand and the signing of a portfolio deal to develop EVEN Hotels across Australasia. She was also appointed a board member of both Tourism Accommodation Australia and the Tourism & Transport Forum.

Many women are put off by the lifestyle associated with working in operations, how did you get into it?

My offer to move into operations came off the back of my time as VP of commercial at IHG. The company was incredibly forward thinking and recognised the value of hiring outside of the typical status quo. The day-to-day is quite different to commercial, so I did find it challenging initially.

Contrary to what many aspiring females believe, you don't need to change your lifestyle that much to work in operations. If you build a strong team around you, you'll be fine.

In operations, you're at the front of the business – problems can escalate to crises quickly. In the COO role, you might have to coach a GM who's about to go on TV to address a food poisoning crisis, or you might have to deal with a dispute raised by an owner. There's much more immediacy.

Of course, as a COO I would occasionally need to work out of hours, but that's similar to most professions. What I have needed to do is schedule time, or at least allow the flexibility in my diary, for the unexpected.

Your career has taken you to so many interesting places, is gender diversity catching on elsewhere?

It's been quite a mixed lot really.

Working in the Middle East, where the role of women is somewhat more limited, makes you pause and reflect on your environment. Don't get me wrong, if you're in a senior leadership role, there's a lot of respect out there and I never felt undervalued. But in terms of local talent, gender diversity is a slow burn.

I also saw some fantastic work in the Southeast Asian market, where there's a good culture of hiring locals into GM roles and a high proportion of women in those GM roles. Rather than hiring ex-pats, owners look for local talent who can connect with their teams and guests. This approach has provided IHG with a great pool of local talent.

In contrast, I saw the need for gender diversity initiatives during my time in Sydney. So I launched "Rise" for aspiring female general managers who we felt had ability and aspiration, but needed more support and motivation.

Do you think there's a lot of pressure for senior women to support other women?

I'm not sure that pressure is the right word, but I definitely feel a sense of responsibility. When I have a moment of self-doubt, I remind myself that I have an opportunity to inspire younger female leaders to take those bold steps.

What advice would you give to aspiring female talent?

Typically, I would say be courageous and always remember that leadership is transferable. If you bear that in mind, your leadership skills can take you anywhere.

And don't be afraid to move around – I've seen lots of women move function or region to better suit their ambitions. Don't ever feel restrained, be bold and concentrate on becoming a leader that others can emulate.

Views from the industry



Phil Urban

Group Chief Executive Officer, Mitchells & Butlers

Phil Urban became CEO of Mitchells & Butlers nine months after he joined the FTSE 250 business as its chief operating officer in 2015. A qualified accountant, Phil has previously held managing director roles with Whitbread and Scottish & Newcastle's pub-restaurants. Prior to joining M&B he was managing director of Rank's Grosvenor Casinos.

With more than 1,750 sites, M&B operates more than a dozen of the UK's best-known brands, including Harvester, Toby Carvery, All Bar One, Miller & Carter and O'Neill's, as well as the Innkeeper's Lodge hotel brand.

Mitchells & Butlers has a reputation across the industry for having a positive, female-friendly and merit-driven culture. Was this the result of careful planning?

I've been with Mitchells & Butlers for four years and CEO for three, so I can't claim to be the architect. But when I was a competitor, I always felt that M&B had an inclusive culture.

When I arrived, it was exactly as I expected, and I was very lucky to inherit the role at a company with such deeply-ingrained values. It's in the DNA. That was one of the reasons I joined, we spoke the same language.

Our approach to diversity is not something that we overtly state, but our business has become a diverse one as a by-product of the culture.

As a business, do you consciously model yourself as a training ground for women who want to rise up the ranks into leadership roles?

Like most businesses, as part of our culture and in everything we do, we have to actively ask ourselves the question of whether or not we have gone far enough. Through forums and roundtables, we seek to understand the barriers, and how can we make certain types of roles more attractive. How can we make the working environment more flexible, and what can we do to retain our best managers?

I believe that what we have done as a business is to genuinely listen to what the organisation has to say. In the same way as you listen to your customers, you need to listen to the team. It's also about hearing what they have to say and then acting on it to make it a two-way dialogue.

What strategies has your Inclusion and Steering Group put in place to achieve a high level of gender representation amongst your Executive Committee and Direct Reports population?

Culturally, you need to have people in senior positions who genuinely believe in the initiative. That's the starting point – without it, nothing is ever going to happen. Then you need to ensure the leadership team shares the same view. If they do, it's an open door. You go out and speak to people and ask them about the issues.

For example, we have drop-in sessions that are open to everyone. It might be around the topic of mums returning to work and through these forums you pick up a little nugget that you haven't thought of before and can act on.

And what about BAME candidates, is there a better way of attracting them to the industry?

Absolutely, this is firmly on our agenda. Again, we are asking ourselves the key questions to understand what the barriers are and how can we break them down. We don't have all the answers yet, but like anything the crucial thing is you have to genuinely want to do it.



Moving the dial

BY JON TERRY – PARTNER, PWC

TURNING GOOD INTENTIONS INTO REAL PROGRESS ON DIVERSITY AND INCLUSION

The mixed progress on improving diversity and inclusion in the Hospitality, Travel and Leisure (HTL) industry indicates that moving the dial requires more than good intentions.

If diversity and inclusion are strategic priorities, they should be treated in the same way as other business imperatives such as market expansion or managing margins, rather than as a vague set of objectives or isolated policies.

How can your business build diversity and inclusion into your strategic planning, operational management and the culture and values that drive your organisation?

Why diversity and inclusion are strategic priorities

Diverse and inclusive businesses are stronger businesses, gaining in motivation, innovation, talent appeal and customer reputation (see ‘Gaining an edge: Research demonstrates why diverse and inclusive businesses perform better’).

While this is true for all sectors, the need to treat diversity and inclusion as business imperatives is especially strong in an industry like HTL, where the customer experience is dependent on staff motivation and engagement.

It’s important that leaders within your business reflect the diverse make-up of your staff and customers. Without this, you’re likely to miss out on a vital element of customer and employee understanding and your performance will suffer as a result. In turn, diversity and inclusion are increasingly important in shaping brand perception, customer choices and your ability to attract key talent.

A poor reputation on diversity can discourage talent from taking up careers within the industry or choose to work for rival companies within it. It can also put off customers.

This is also an increasingly visible issue, with the introduction of gender pay reporting bringing the lack of diversity among high earners into sharp focus. PwC’s analysis

of the first round of statutory disclosures shows that the HTL industry’s record on gender pay is mixed (see ‘Closing the gender pay gap’). There are far more men than women in senior and technical roles and far more women in lower paid and unskilled positions. The proposed introduction of ethnicity pay gap reporting will heighten the spotlight still further.

Nice to have, not necessarily must have

GAINING AN EDGE:

Research demonstrates why diverse and inclusive businesses perform better.

Diverse businesses create better outcomes.

Diverse businesses create better business returns.

Diverse teams are more innovative and create more value.

Diverse businesses are more attractive to potential and existing employees.

Firms where diversity and inclusion are a business priority improve their reputation and brand.

Source: Diversity is the solution, not a problem to solve, PwC, 2018

As initiatives such as WiH2020 demonstrate, there is a growing commitment within the HTL industry to improving diversity and inclusion. Yet, research in this report shows that while HTL workforces are generally quite diverse, the make-up of senior and better paid positions is often less so. For example, while women are well represented in junior and middle management, a gender gap begins to emerge the further up the organisation you go – only 10.4% of CEOs across the HTL sector are women. And while women now make up 36% of people in leadership teams (executive committee and those reporting

directly to them), many are clustered within support functions such as HR, rather than frontline profit and loss (P&L) drivers. There is also a widening gap between companies who are performing well and those that aren’t.

What’s holding up progress within many organisations? At present, we’re seeing a lot of high-level diversity and inclusion policies and isolated initiatives to promote them. Common examples include employee networks or graduate recruitment drives among underrepresented communities. These can be valuable in themselves and help contribute to pockets of progress across the industry. Yet, oftentimes the piecemeal nature of these efforts means that they’re insufficiently comprehensive or co-ordinated to make a real difference within the business. They may also lack the data and evidence-based underpinning to pinpoint the most pressing issues to be addressed. It’s certainly surprising that while there would be data and analytics covering areas such as the make-up of customers or the productivity of the workforce, there is still very little use of data and analytics in the area of diversity and inclusion.

Moreover, the choice of initiative is often prompted from outside the business. This includes following what peers are doing or taking part in initiatives that have a high PR potential, rather than identifying specific shortcomings within the organisation and tackling them in a systematic, joined-up and measurable way.

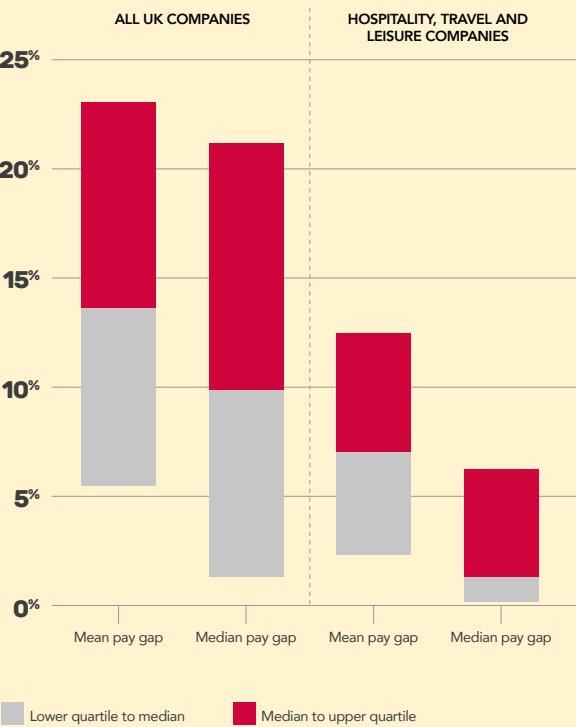
Many businesses also make commitments such as a target percentage of women in senior management without looking at how this is going to be realistically achieved or having appropriate data and analytics to drive progress. It’s hard to see such ‘hit and hope’ approaches being successfully applied to other business priorities such as acquisition, restructuring or new market entry. It’s therefore unsurprising that many approaches to improving diversity and inclusion aren’t particularly effective.

Closing the gender pay gap

The first year of gender pay disclosures in HTL reflect the distinctive nature of these sectors and longstanding pay challenges within them.

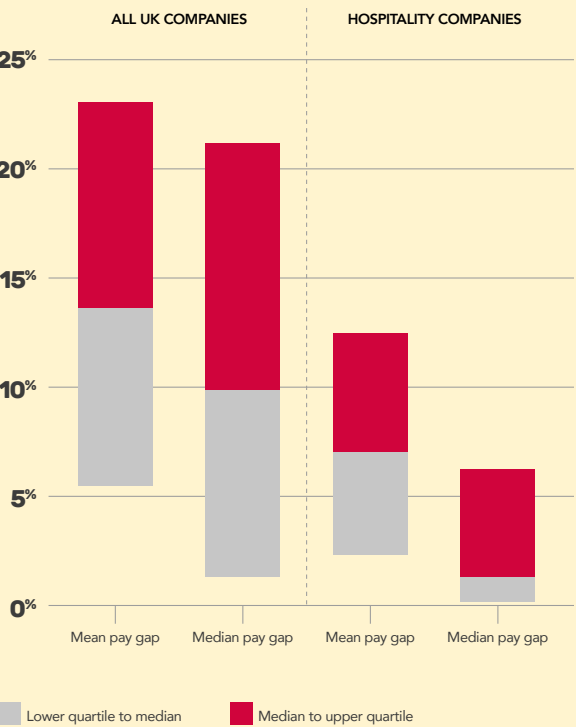
HOSPITALITY, TRAVEL AND LEISURE COMBINED PAY GAP

The chart below shows the median and quartile range of pay gaps for all UK companies compared to hospitality, travel and leisure companies.



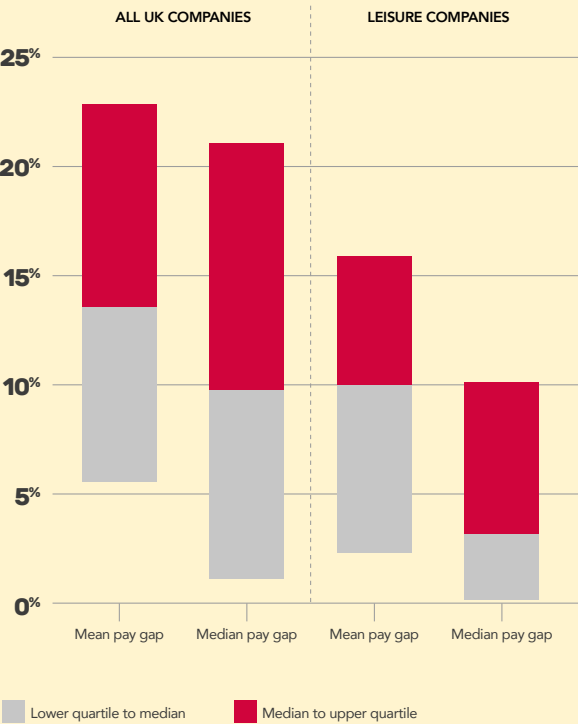
HOSPITALITY PAY GAP

The chart below shows the median and quartile range of pay gaps for all UK companies compared to hospitality companies.



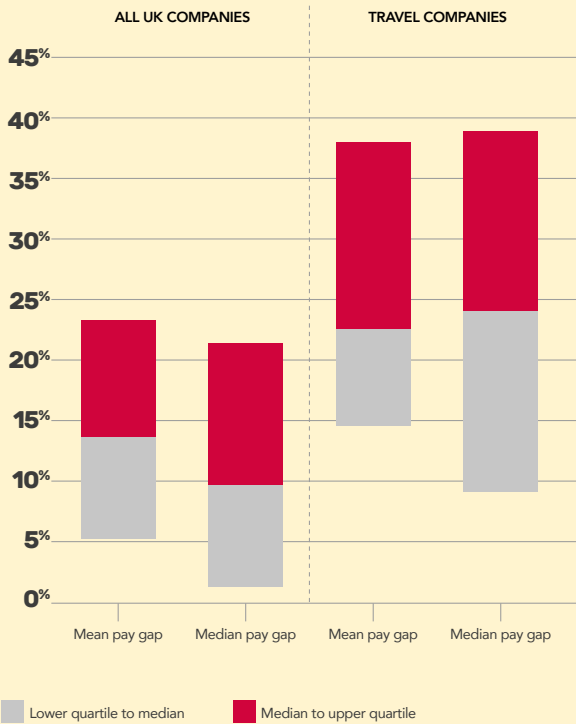
LEISURE PAY GAP

The chart below shows the median and quartile range of pay gaps for all UK companies compared to leisure companies.



TRAVEL PAY GAP

The chart below shows the median and quartile range of pay gaps for all UK companies compared to travel companies.



PwC analysis shows that the median gender pay gaps for hospitality (7%) and leisure (10%) were lower than UK businesses as a whole (14%). However, there continues to be far more men than women in senior and technical roles and far more women in lower paid and unskilled positions. These are also sectors with high staff turnover and a high prevalence of insecure seasonal work.

The median gender pay gap for travel (22%) was higher than the economy as a whole. A key driver is the underrepresentation

of women in senior positions and technical posts such as airline pilots. The demands of the sector also put pressure on work-life balance and make it hard for people with caring responsibilities.

Far from being a one-off exercise, the big test is the second year of disclosures (2018-19) and those thereafter, as HTL businesses come under pressure to show what they’re doing to close the gap and demonstrate progress.

Source: PwC analysis

The way forward: Building diversity into the business fundamentals

So, how can your business move the dial? Our work with companies that are making the most progress highlights the importance of ensuring that diversity and inclusion get the same direction, measurement and accountability that would be applied to any other strategic priority. In practice, this comes down to six key foundations for effective change:

1/ Alignment with business strategy

The strategy and underlying business case for promoting diversity and inclusion are aligned and articulate how the measures support specific business priorities such as strengthening customer satisfaction or attracting hard to secure talent.

One of the organisations that have adopted this approach is Channel 4. As part of its '360° Diversity Charter', Channel 4 seeks to align its diversity and inclusion commitments to all aspects of its business strategy, including its priorities as an employer, a broadcaster, a commissioner and an industry influencer. In seeking to reflect the diversity of British society, for example, the broadcaster has set targets for increasing the on-screen representation of disabled people as actors, experts, presenters or contributors in its biggest shows.

2/ Clear direction, ownership and tone from the top

Executive teams set the tone for the organisation and ensure diversity and inclusion are recognised as business priorities. This requires more than just statements of intent. It's important to ensure that someone within the leadership team is given the job of making it happen, and held to account. This can be supported by building diversity and inclusion metrics into individual performance objectives and incentives as part of an organisation-wide accountability framework.

Shell is backing its aspiration that 30% of senior leaders in the UK will be women by 2020, rising to 35% by 2025, with actions plans, data review and accountability. The UK leadership team meets every three months to monitor the progress being made in diversity across the UK. Leaders also measure the effectiveness of their plans, adjusting them as needed to maximise their impact.

3/ Set realistic objectives

You can't do everything at once. It's therefore important to identify the headline diversity and inclusion objectives that are most important to your business and shortcomings most in need of addressing. This might be strengthening the wellbeing of your workforce, changing attitudes to mental health, improving the experience of women or increasing the representation of people from ethnic minorities in senior and technical positions. As progress advances, you can begin to look at a second set of priority areas.

An example of this clearly directed focus is Simmons & Simmons. The company has worked extensively with Stonewall to develop an innovative approach to engaging with their suppliers to promote LGBT+ equality. In addition to implementing new processes and policies for their own procurement and supply chain, the company also measures and monitors the commitment of its largest suppliers and shares best practice at themed roundtable events.

4/ Turn objectives into an action plan for delivery

Your headline objectives set the direction and help shape the values within your organisation. To deliver, it's important to translate these objectives into an action plan that sets out measurable goals and how they will be achieved. For example, you may have made a commitment to boost female representation within your leadership team. The action plan would focus on specific drivers such as mentoring, sponsorship and promoting role models. It could also look at how to tackle barriers that affect the talent pipeline such as potential biases within selection criteria or cultural issues that can deter women from moving into P&L roles.

Unilever is seeking to accelerate progress on empowering women by not only promoting diversity and inclusion within its workforce, but also active steps to strengthen women's participation in the wider economy. Measures range from support for training within communities to actively challenging stereotypes that can hold women back.

5/ What gets measured gets done

To support the action plan, there should be appropriate data, analytics and tracking to gauge progress, target intervention and drive accountability – what gets measured gets done.

Potential data sources include employee workforce surveys, tracking the career paths of high potential individuals and exit surveys to gauge why key talent is leaving. These sources can feed into a dashboard that brings together quantitative measurement of diversity and qualitative assessments of inclusion, to create a picture of progress and how it can be improved.

Overall, however, diversity and inclusion analytics is fairly limited. For example, while most companies would be able to tell you the number of women in their organisation, only a small percentage could translate this into a dynamic picture of how women join, prosper within and leave the business (what we at PwC term the ‘flow rate’ of women). Even fewer could give the most basic picture of the make-up of their organisation through the lens of ethnicity or disability.

If we look at flow rate analysis as an example of how analytics could help drive progress, this approach would provide data that would help you to understand how women move dynamically through your organisation over time (and, therefore, how female representation is changing). If, say, you want to improve the number of women in senior roles, you have three fundamental ‘levers’ that can influence this:

- The number of women who join your company.
- The number of women who are promoted each year.
- The number of women who leave.

By looking at each of these levers, you can forecast how your employee population will change over time, providing a baseline for any targets. Critically, you can also use this data to identify the ‘cold spots’ in your organisation – where female representation is not progressing – and to test which changes will have the biggest impact on gender balance.

Prominent examples of this data-led approach include Barclays’ Dynamic Working programme, which is designed to help employees balance their work and life priorities more effectively. Barclays is not only monitoring uptake of the scheme, but also its impact on employee engagement and job satisfaction.

6/ Tell it how it is

Rather than simply publicising initiatives or promoting stand out strengths, reporting should focus on plans for addressing identified deficiencies and communicating progress over time.

Your business may be wary of drawing attention to shortcomings. Yet, even if you’re behind the curve on diversity and inclusion now, there are opportunities to get on the front foot by acknowledging that there are issues that need to be addressed and setting out plans for accelerating progress. Such openness and resolve can make a favourable public impression.

Set up to succeed

You can’t resolve all the issues overnight, but treating diversity and inclusion like any other business priority will focus minds and accelerate progress.

We believe that there are a number of key questions that your organisation should consider as it seeks to translate good intentions into real progress:

- 1/ Are diversity and inclusion seen as business priorities or just a nice-to-have within your organisation? If not, how can you successfully make the business case?
- 2/ Are diversity and inclusion goals achievable? If not, what practical steps are needed to move the dial?
- 3/ Are diversity and inclusion built into strategic planning and management? If not, how can they be aligned?
- 4/ Are action plans sufficiently practical and evidence-based? Is progress tracked? Are the results transparent and followed up on? Are managers accountable for progress?
- 5/ Is there sufficient collaboration between senior management, line management and HR in the direction and execution of diversity and inclusion strategy?

The more you address these considerations and the more progress you make, the more you can turn diversity and inclusion into a key differentiator and performance driver – stronger brand, better pick of talent and more satisfied customers.



Leading by example

BY JOANNA AUNON AND
JENNIFER DUTLOW – WiH2020

5 COMPANIES DEMONSTRATING THEIR COMMITMENT TO DIVERSITY & INCLUSION

The HTL industry has some excellent examples of individual organisations that demonstrate ongoing commitment to Diversity & Inclusion. These companies have implemented initiatives and best practice that have had significant impact and can provide a source of inspiration for other organisations across the sector.

All of the case studies covered in this chapter share the fundamental criteria that Diversity & Inclusion, and particularly the advancement of women, is viewed as a business-critical initiative at the very senior levels of the organisation. It is undeniable that vision and commitment at the Board and Executive level is needed to make meaningful and sustained change with the greatest impact.

From a commercial standpoint, it is clearer now than ever that the organisations embracing a progressive approach to D&I are gaining a competitive advantage by accessing potentially untapped or undeveloped sources of talent. The initiatives covered in this chapter and the awards that have been achieved by organisations in the industry clearly demonstrate that advancements have definitely been made and the dial is starting to move. However, there is still a lot to do and it is imperative to maintain the focus, collaboration and momentum that are spreading throughout the HTL industry.

IHG

One of the world's leading hotel companies, IHG unites its brands and more than 375,000 colleagues around a purpose of providing 'True Hospitality for everyone'. Underpinning this purpose is a culture that celebrates difference and ensures that everyone feels welcome and valued, regardless of their gender, background, faith, sexuality, age, nationality or beliefs.

IHG understands that its approach to diversity and inclusion is important to an increasingly wide range of stakeholders – from sharing the same values as its millions of guests and thousands of third-party hotel owners, to its reputation as an employer with colleagues and tomorrow's talent. The company is clear that D&I is also integral to its success today and to its future growth. Without the perspectives and innovation that a diverse and inclusive culture brings, it wouldn't be able to achieve great things.

Over several years, IHG has established a series of successful programmes in different markets around the world, which have helped build high levels of colleague engagement, and seen the company recognised externally for having an increasingly diverse leadership group. The number of women working in senior roles at IHG has more than trebled over the last five years, and in the 2018 Hampton-Alexander Review it was listed in the top 10 of FTSE 100 companies for female representation across its Executive Committee and their direct reports for a second successive year. Review it was listed in the top 10 of FTSE 100 companies for female representation

To ensure it continues to meet expectations in this important space, IHG created a global D&I Board in 2018, chaired by its CEO, Keith Barr. One of its first actions was to commission Accenture on an insights exercise, which involved interviewing IHG colleagues to identify the real and perceived barriers to women progressing into Hotel General Manager and senior level corporate roles. These insights are shaping several initiatives prioritised by IHG's D&I Board around further strengthening its culture of inclusion; increasing the diversity of its leadership and talent; and putting the right decision-making processes around its actions.

In addition, as part of its 2018-2020 Responsible Business Targets, IHG has published clear commitments to increasing the level of diversity among its senior leadership in terms of gender and nationality or ethnicity, and to increasing the number of females working in General Manager and operations roles within its managed hotels.

Over the next 12-18 months, IHG's focus involves expanding existing Employee Resource Groups to more of its markets globally. These include Lean In circles, which provide peer support for women at IHG, and Rise, a local market talent programme focused on providing tailored development plans and mentoring for females aspiring to become General Managers in IHG hotels.

In addition, IHG will embed new initiatives, such as a rollout of new mentor matching technology; the creation of local D&I councils that represent colleague voices and market-specific priorities; and a review of its practices and policies, including its hiring processes and flexible working arrangements.

Bourne Leisure

Founded in 1964, Bourne Leisure operates in the leisure and holiday sectors in the UK through its Haven, Butlins and Warner Leisure Hotels brands.

Bourne has more than 6,000 team members that work across their three brands, which rises to 17,500 during peak periods. Bourne has a clear mission to: "Give our guests a great time with memories that last a lifetime." We also want to create amazing career opportunities for our team and we bring this to life through a deal for every team member: "Give our guests a great time and we'll give you the opportunity of a lifetime".

Bourne Leisure has utilised the research and findings of a global cross-industry 2016 Mercer Report (Mercer) when looking at how to progress diversity and inclusion in the organisation. Key findings of this survey have been that Women continue to be under-represented in the workforce at all career levels and that organisations are failing to build future female talent pipelines.

Bourne believes that opportunities should be open to all. We have therefore developed and implemented a programme to encompass the following components:

- Talent reviews – robust approach to reviewing our talent across the business including diversity.
- Investment into a cloud-based, world class HR platform to encompass a careers hub, learning hub and talent hub to bring visibility of opportunities to all our team. The analytic capabilities from this will also be crucial to measure progress on our talent strategy.
- Launch of 'Grow to General Manager' Programme to develop more home-grown GMs.
- Actively profile role models and share career stories via 'Your leadership story'.

This is a journey for us and we want to involve all our leaders in helping us be even better at growing our team and this includes our approach on diversity and inclusion. We're building our foundations first around career plans for all our team and alongside this we're rolling out our 'grow to' programmes that align with our career pathways and support our team to achieve their full potential. We're also investing in our technology to embed diversity into our digital experience for our team.

Our CEO and Exec Team are ultra-supportive of everything we are doing to be a place where all our talent can thrive so that we give our guests a great time with memories that last a lifetime every minute of every day.

Hilton Hotels

With more than 5500 properties in over 100 countries, Hilton Hotels stands as one of the most recognised brand names in the hospitality industry. Hilton is committed to building an inclusive workforce that fully represents many different cultures, backgrounds and viewpoints, and that allows every team member to thrive and achieve their personal goals and full potential. Hilton elevated the focus on its Diversity & Inclusion priorities in 2010 by building a framework of Culture, Talent and Marketplace initiatives to place D&I at the core of their Vision, Mission and Values.

The cornerstone which was identified for any such programmes was accountability from executive leadership and the strong ongoing support and commitment from all senior leaders. To this end, the Hilton Executive Inclusion Council (EIC), chaired by the President and CEO Chris Nassetta, was created in 2011.

The overall D&I strategy has been multifaceted; it has included creating Women's Team Member Resource Groups (WTMRG) around the world and establishing the Executive Committee Networking



programme (ECN) to elevate mentorship, sponsorship and networking.

Both the WTMRG and the ECN are sponsored by senior leaders in the business. These groups foster an inclusive and innovative business culture by driving meaningful professional development, and they empower their members through leveraging mentorship opportunities and providing business insights.

D&I programmes are further augmented by the Leadership Development portfolio and additional events such as Women in Leadership conferences, designed to support and advance more women into senior leadership positions.

Significant progress has been made in strengthening the female talent pipeline over recent years. However, Hilton remains continuously focused on developing and introducing new initiatives to promote and support the D&I agenda and inspire and engage women to achieve their full potential within the business.

Merlin Entertainments

As a global organisation of 9,000 employees, rising to 29,000 (dependent on seasonal variations), at Merlin our people are the biggest single reason for our success. We are therefore always striving to make life at Merlin better for all of them by offering an inclusive working environment, where difference is valued. Diversity is a crucial part of this. We look for the best people and are committed to ensuring all diverse groups are fully and properly represented at all levels of our organisation.

Gender diversity and inclusion is not a new focus for Merlin but a subject we continue to enhance and extend. Therefore, to ensure progress at all levels of our business, we have recently established a Diversity Council which extends ownership for diversity and inclusion beyond the remit of HR, with representatives from across our business.

Together with the Diversity Council we recently created our 'All Together' Diversity and Inclusion strategy to ensure that "Merlin will be the most inclusive and flexible employer within our industry, truly international in its make-up" and which retains focus on gender but includes other elements of the overall diversity too.

The four (4) pillars of this programme comprise:

- Finding the best people and making it work for them
- Cultural and ethnic leadership reflecting our customers
- Gender balance in all teams
- Encouraging people with disabilities to join and grow with Merlin.

To support our D&I programme, several development programmes are underway to provide reinforcement from 'Managing Inclusively' training for our managers

and recruiters, to ensuring balanced shortlists for external recruitment to offering greater support and development to talented women within our organisation

We are proud to be recognised as number 7 in the Hampton-Alexander Top 10 Best Performers in the FTSE 250 - improving diversity of our PLC Board to ensure it is representative by gender and nationality (in terms of the countries in which we operate) which has been a key priority. Specifically, most recently we have made progress on our ExCo with 25% female representation (compared to 18% in 2017) including the appointment of our first female Managing Director for our Resort Theme Parks division – a key appointment. We have once again increased the percentage of female permanent employees by 1% to 49% (2018: 4,412, 2017: 4,182, 2016: 4,226).



ODEON CINEMAS GROUP

ODEON Cinemas Group is Europe's largest cinema operator with cinemas in 14 countries. In 2016, our Group was growing fast and, to avert a potential talent gap, we needed all our people fully mobilised, energised and engaged.

It was timely to refresh our Diversity and Inclusion strategy. While it resonated with our values, we wanted a clear line of sight between the activities we undertook and increasing career opportunities for all colleagues.

We started with gender - as our highest diversity population it had the potential to have the greatest impact. Using our evidence-based, collaborative approach, we did a deep dive into our metrics. This confirmed gender gaps at senior levels and that women were performing as well as men, but less likely to be promoted. Our teams told us that confidence, role modelling and training were wanted.

From the beginning, our Executive team supported strategy development and were first to receive inclusion training. We enhanced our metrics and created tools to help spot talent and challenge unconscious bias. We developed programmes supporting our high potential women and spent 1000 hours in inclusion awareness and training for colleagues. We created online self-service tools for colleagues with families to access support and information quickly and easily.

Our long-term strategy: Our Incredible Differences was launched by MD Mark Way, and CPO Kathryn Pritchard, in 2017, bringing our leaders together to talk about the gender imbalance. It was important to include men in developing solutions, so we created the professional 'plus one' concept - connecting women leaders with a male colleague to support each other's career journeys. We want everyone to play their part in changing the status quo. That's why we invited equal numbers of men and women leaders to the

launch. The responsibility to make changes has been shared all through our business.

In just a short time, the conversation in the business is changing. Our Incredible Differences is now part of our vocabulary, managers use tools to tackle unconscious bias and identify potential and we're collecting stronger data to monitor and accelerate our progress.

The changes are clear to see - three women on the Executive (21% up from 9%); more women in senior roles (23% up from 19%) and progress in our seven territory senior teams – from four all-male teams to just one. 55% of 2018 promotions are women and four leaders were named in Celluloid Junkie's 2018 International Women's Day lists.

Game-changers for us in building our inclusion culture were:

- Our talent promises were critical in turning inclusion into everyone's responsibility
- Strong leadership presence all the way
- Organisational-wide changes to career planning to ensure inclusion
- Splitting engagement survey results by gender gives better insight
- A clear Group-wide identity and branding for maximum impact

We know we have a long way to go. In 2019, we'll launch an Inclusion Board (a colleague network), diversity calendar, and more visibility of inclusion in career stories. We'll continue improving through our 'ask, listen, plan, act' cycle and keep the conversation going to build a robust and sustainable culture of inclusion.

"Our Incredible Differences programme has had a huge impact on inclusivity. Not only have we seen a growth in confidence across our future female leaders, we've also seen a refreshing change in mindset and development of different genders and ethnicity. Given our diverse guest profile, this is supporting our business growth."

A focus on hiring

BY ELLIOTT GOLDSTEIN –
PARTNER, THE MBS GROUP

A KEY DRIVER OF PROGRESS

Our research has shown a mixed picture overall. While a number of metrics show good progress has been made towards greater gender diversity, that progress is not universal, and it is clear there remains a lot of work to do.

Looking ahead, we see plenty of green shoots. An ever-increasing number of women at Direct Report and non-executive levels means there is an exciting new talent pool to draw new leaders from. Perhaps more excitingly, today we can point to inspiring female role models across virtually all functions within the HTL sector, as you can see illustrated in the promotions and moves in the next chapter.

Hiring is one of the key drivers of progress in diversity. This chapter outlines some of the ways companies can hire and develop more diverse leadership teams, as well as some of the innovations in recruitment more generally.

Bridging the gap: tackling the lack of women in key leadership roles

Reports and reviews like Hampton-Alexander and initiatives like WiH2020 set out to make a meaningful, lasting impact. Far from seeking one-off gains, the hope is that a rising tide of progress will carry momentum for a long time to come – until we start to see something close to genuine gender parity in the workplace.

While we can hope it will in the long term, that rising tide has not yet washed over the key leadership roles. So what can we do to improve the chances of female leaders taking the top spot?

TRANSITIONING FROM OUTSIDE THE SECTOR

One way we can broaden our horizons is to look outside of the sector.

Highly successful examples of HTL leaders who have transitioned from outside the sector include Whitbread's Alison Brittain and Kate Swan at SSP.

Alison joined Whitbread in 2015, where she succeeded Andy Harrison as Group CEO, from a career in retail banking. She was latterly Group Retail Director of the Retail Division at Lloyds Banking Group and had previously held roles at Santander and Barclays Bank. In 2017, Alison was announced as Business Woman of the Year in the prestigious Veuve Clicquot Awards and was awarded a CBE in the 2019 New Year's Honours List.

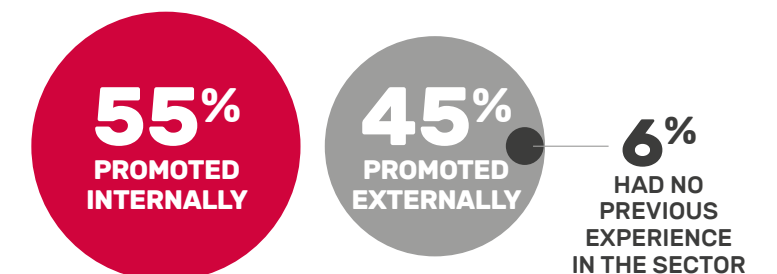
Kate Swann has been the Group CEO of SSP since 2013 (it has been announced that she will leave at the end of May 2019). She was previously CEO of WHSmith, where she is credited with turning the business around and setting it up for future success by growing its travel retail offer. Her earlier retail experience included roles at Tesco, Dixons and Argos.

Particularly for the larger HTL businesses, Dame Carolyn McCall has proved that coming into the sector can continue to be a springboard for further roles outside it. Having joined easyJet as CEO in 2010 after 24 years at Guardian Media Group, Carolyn returned to the media industry as CEO of ITV last year.

Alison, Kate and Carolyn share something else in common: alongside their executive careers, they have all held NED roles that have broadened their sector experience. Alison has sat on the Board of Marks & Spencer since 2014, while Carolyn has held a number of NED roles in consumer-facing businesses including Tesco, New Look and Burberry. Kate, meanwhile, has sat on the Boards of non-consumer businesses including British Land and Babcock International.

At the time of writing this report, 55% of current CEOs across the wider HTL sector were promoted internally. Of the remaining 45% appointed externally, just over 6% had no previous experience in the sector.

CEOS - INTERNAL VS EXTERNAL APPOINTMENT



There are also opportunities to look outside the sector for other key leadership roles. Our research shows that around 40% of Chairs and 57% of CFOs across the FTSE 350 HTL did not have prior experience in the sector.

On the one hand, Alison Brittain, Kate Swann and Carolyn McCall demonstrate just how successful key hires from outside the sector can be. Yet, the data shows that just a tiny fraction of current CEOs have been appointed from adjacent sectors.

Building balanced shortlists is a perennial challenge for employers and search firms alike, but looking beyond the sector is one of the tools we can use to widen the pool.

Since January 2018, four women have been appointed to chief executive officer roles in HTL companies in the UK. Both Emma Woods (CEO – Wagamama) and Janette Bell (CEO – P&O Ferries) were promoted internally, whereas Sonia Davies (CEO – Scott Dunn) and Karen Stone (Managing Director – Leon Restaurants) were external appointments. All four had previous sector experience.

CROSSING FUNCTION

Turning our attention to the internal hires in the sector, one interesting trend we are seeing is a change in the shifting paths high-potential leaders are taking to the top.

As discussed elsewhere in this report, the operational nature of most HTL businesses is seen as a potential roadblock to progress in gender diversity.

So it is interesting to see a host of companies finding ways to cycle their high-performing leaders in and out of the different functions.

Highly regarded for their excellence in developing future leaders, this is something businesses like Yum! have been doing for some time.

This kind of approach can make a real difference in all of the key leadership roles – whether that’s developing future CEOs, putting potential CFOs into more commercial roles or finding ways of giving NEDs experience that will set them up as future Chairs, such as chairing committees, joint ventures or divisional boards.

Thinking differently in recruitment

During our discussions with HRDs, CEOs and Chairs, we learned of many grassroots initiatives that companies are implementing to boost gender diversity in their organisations. One hotel group explained how they are working with a local recruiter who specialises in finding women returners in the area around their head office. The initiative is relatively new, but is said to have produced some excellent results already.

Many companies are boosting training and awareness amongst their leadership teams - from unconscious bias training for hiring managers to reverse mentoring. Others are putting extra pressure on internal and external recruiters, demanding that longlists

or shortlists comprise of a minimum number of women or are delivered to the client ‘blind’.

A few companies we spoke to have paid particular attention to the way they market opportunities. One group planned its graduate recruitment very carefully, from the imagery they used to execution. Another found that when they changed a job title from ‘Driver Manager’ to ‘People Manager’, they saw the number of applications they received from women triple.

Tackling a ‘jobs for the boys’ culture, some companies are insisting that HR teams are involved in all hiring decisions, while others are centralising site hiring decisions. For example, one company explained that they have taken kitchen recruitment away from head chefs who have historically tended to hire from a pool of friends and family.

At a macro level, one of the most interesting initiatives we’ve seen on gender diversity in the recent years comes from across the Atlantic. A number of US states, counties and cities have quietly enacted new salary history bans. They build on existing legislation outlawing pay inequality and are specifically designed to prevent hiring processes entrenching existing disparities.

The evidence suggests that women in the US are typically paid 80¢ for every \$1 a man earns in the same job¹. Salary history bans prohibit employers and their agents (ie headhunters and external recruiters) from asking prospective candidates for the details of their current and historic compensation details, forcing employers to enter into pay negotiations based on the value of a role, rather than what a candidate was paid previously.

The objective of these salary history bans is to be applauded, particularly for putting the issue on the global agenda. It is clear to see how this legislation could have a positive impact on reducing the gender pay gap, but what does it mean for improving gender diversity in hiring?

The most important lesson we draw from the initiative is a reminder to deprioritise salary data as a way of assessing a candidate’s suitability for a role.

We’re all accustomed to using salary to determine the scale, scope and seniority of a candidate’s experience - and more often than not, it is a useful indicator. But often enough, it is not - particularly with candidates who may have taken some time out of the workplace or have followed a less traditional career path.

Companies should work hard to ensure robust hiring processes that do not over-index on salary data. This should prevent otherwise viable candidates – who will very often be women – being wrongfully rejected from the process.

US SALARY HISTORY BANS



Salary history bans have been enacted across a number of US States, Counties and Cities, designed to end the cycle of pay discrimination. Though the details vary by location, the bans generally prohibit potential employers asking of a candidate for their current or previous remuneration details. Regions where this legislation has been implemented include:

- New York City
- California
- Illinois
- New Jersey

Source: HR Dive, January 2019

¹ The American Association of University Women (AAUW), ‘The Simple Truth About the Pay Gap’ (October 2018)

Senior Female Leader Promotions

2018 saw a significant number of new female leaders appointed to key leadership roles across the sector. The non-exhaustive list below highlights some examples of recent promotions / moves – and clearly illustrates positive momentum achieving more diverse leadership:

| Company | Name | Position |
|---|--------------------------|--|
| Accor | Karelle Lamouche | Senior Vice President Sales and Distribution, Marketing and Guest Experience |
| American Express Global Business Travel | Joanna Macleod | Chief Transformation Officer |
| Arriva Group | Hilary Tysoe | Human Resources Director, Arriva Trains UK |
| Arriva Group | Liz Benison | Managing Director, Mainland Europe |
| Arriva Group | Jana Siber | Managing Director, Mainland Europe |
| Bills | Sarah Hills | Executive Operations Director |
| Bourne Leisure | Jane Bentall | Managing Director, Haven |
| Burger King | Tamara Griffin | Human Resources Director |
| Carlson Wagonlit Travel | Catherine Maguire-Vielle | Executive Vice President & Chief Human Resources Officer |
| Casual Dining Group | Claire Clarke | Human Resources Director |
| Camelot | Jennelle Tilling | Non-Executive Director |
| Cineworld Group | Renana Teperberg | Chief Commercial Officer |
| Cineworld Group | Camela Galano | Non-Executive Director |
| Compass Group | Alison Yapp | Group General Counsel/Company Secretary |
| Compass Group | Karen Witts | Group Chief Financial Officer* |
| easyJet | Ella Bennett | Human Resources Director |
| easyJet | Lis Blair | Chief Marketing Officer |
| easyJet | Julie Southern | Non-Executive Director |
| easyJet | Flic Howard-Allen | Chief Communications Officer |
| EAT. | Holly Oades | Customer Director |
| EAT. | Esther Arnanz | Operations Director |
| EAT. | Fran Carpenter | Human Resources Director |
| EI Group | Jane Bednall | Non-Executive Director |
| Elior | Esther Gaide | Group Chief Financial Officer |
| Flybe | Heather Lawrence | Non-Executive Director |
| Fuller's | Juliette Stacey | Non-Executive Director |
| GVC Holdings | Lindsay Beardsell | Group General Counsel |
| GVC Holdings | Virginia McDowell | Non-Executive Director |
| Holiday Extras | Margaret Rice-Jones | Non-Executive Director |

| | | |
|---|-------------------------|---|
| Holiday Extras | Anna Divers | Product Director |
| International Consolidated Airlines Group (IAG) | Nicola Shaw | Non-Executive Director |
| International Consolidated Airlines Group (IAG) | Deborah Kerr | Non-Executive Director |
| IHG | Laura Miller | Chief Information Officer |
| JPJ Group | Andria Vidler | Non-Executive Director |
| Just Eat | Helen Weir | Non-Executive Director |
| Leon | Karen Stone | Managing Director |
| Marriott | Rena Reiss | Executive Vice President & General Counsel |
| Merlin Entertainments | Fiona Eastwood | Division Managing Director, Resort Theme Parks |
| On The Beach | Elaine O'Donnell | Non-Executive Director |
| Paddy Power | Aine Flanagan | Group Chief Strategy Officer |
| Pizza Express | Isabel Greiner | Group Strategy and Programme Director |
| Playtech | Susan Ball | Non-Executive Director |
| Prezzo | Karen Jones | Executive Chair |
| Pure Gym | Rebecca Passmore | Chief Operations Officer |
| P&O Ferries | Janette Bell | Chief Executive Officer |
| Scott Dunn | Sonia Davies | Chief Executive Officer |
| Sodexo | Sophie Etchandy-Stabile | Independent Director |
| SSP Group | Rachel Howarth | Regional Managing Director for The Netherlands (in addition to previous Group HRD role) |
| SSP Group | Carolyn Bradley | Non-Executive Director |
| The Gym Group | Ann-marie Murphy | People and Development Officer |
| The Rank Group PLC | Luisa Wright | Group General Counsel/Company Secretary |
| Trainline.com | Victoria Biggs | Vice President, Brand and Communications |
| Travelopia | Sally Cowdry | Managing Director Tailormade & Group Chief Customer Officer |
| TUI AG | Birgit Conix | Chief Financial Officer |
| Wagamama | Emma Woods | Chief Executive Officer |
| Wizz Air Holdings PLC | Marion Geoffroy | Chief Corporate Officer |
| Wizz Air Holdings PLC | Maria Kuyriacous | Non-Executive Director |

Enabling work and family

BY JENNIFER LISTON-SMITH –
DIRECTOR, MY FAMILY CARE

EMOTIONAL, CULTURAL AND PRACTICAL STEPS

Having a child can be a watershed moment in a career, especially in sectors which move fast and require the returner to hit the ground running. It can all be fairly daunting and too easy to fall off the track to leadership while juggling multiple demands at work and home. But the business case for stopping up this leak in the talent pipeline is already understood by leading employers in the Hospitality, Travel and Leisure sectors, and examples of best practice are emerging.

Before we look at these, let's get two things straight: firstly, having children is not part of life for every working woman (though over 80% of UK women do have children at some point). Secondly, caring for children is an increasingly gender-neutral role: men are expecting – and expected – to be more involved as fathers. That said, the Gender Pay Gap still widens sharply during the child-bearing years. Empowering working parents and carers and encouraging male caring plays a part in levelling the playing field.



A Three-Part Plan

Progressing to the top in HTL brings challenges for working parents, and it can help to focus the mind on three areas for action as an employer.

Culture is vital. Working parent role models matter: or 'real models', that are down-to-earth, achievable examples. These need to be diverse, spanning roles and seniority and shared creatively, using technology for reach. Guidance for line managers helps, including what to say (and not to say) when a team member becomes a parent or a carer of adult dependants. Promoting and enhancing shared parental leave also breaks down barriers that exclude women from work and men from the home.

Practical enablers are just that. High performers want the flexibility to be always on: delighting relentless customers, avoiding or managing critical incidents, motivating

field workers or multilocation operational teams. This requires creative and bold thinking about what flexible and agile working means, pairing focus on customer satisfaction with the presumption that flexibility is possible. Shift workers can find vastly better ways of arranging holidays and working patterns together if they feel motivated to make it work. Marketing teams still launch the big campaign, sales people still chase their commission even while the team flexes together. A parent goes home for children's bedtime, logging on later and the team still feels good. But it's not just about flexible/agile working. It might be advice on navigating the care maze for a career returner (or a senior cross-sector hire) or backup care for the days when nothing quite works out.

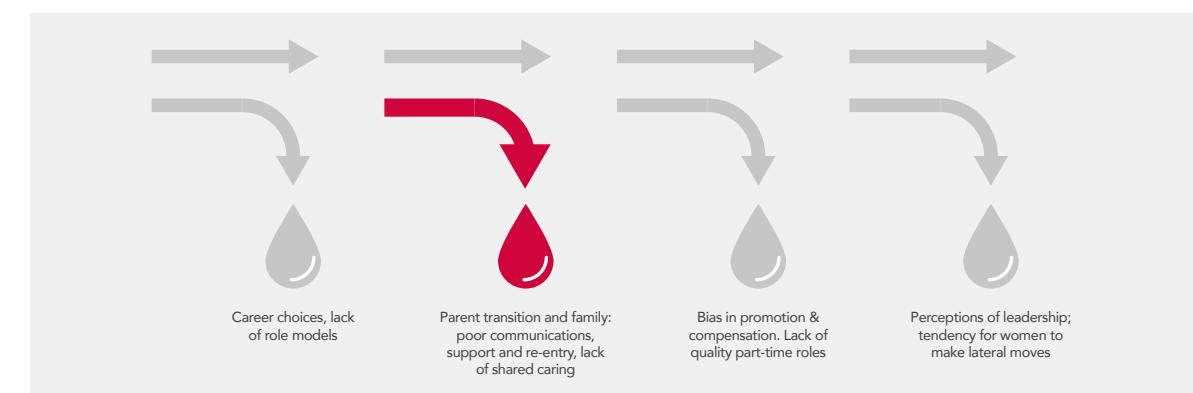
The development and wellbeing side might include access to networks, using clever technology while managing costs across a large employee base. Covering popular topics through webinars helps extend reach whether you're addressing understanding dementia or career progression.

Small steps, big impact

One beverage and events company has put in place an aptly named 'blended' solution providing individuals and line managers with a timeline of prompts and tips as they go through the maternity or paternity journey. An app pushes out this 'just-in-time' information to their high-performing, sales-driven population, while access to internal

coaches gives extra thinking space when needed. The app also reaches out to line managers to encourage them to have timely conversations. There's great value in nudging both individual and manager to have a well-planned handover, keep in touch as much as they want to during leave and then have the confidence to make an influential return. It's a small step, but access to tools and also shared insights from other working parents can make all the difference. It normalises the challenges and offers new perspectives.

Another great example in the entertainment and leisure industry has seen an internal parents network take charge of hosting events for parents of any gender, family structure and stage of parenting. The popularity and engagement value of the network was noted in the C-suite, and a budget allocated, so as well as their ongoing events, they have commissioned external coaching for new parents to support that crucial transition and return. Some of the biggest impact seems to come when peers step forward and share advice on combining career with family through networks. Suddenly the whole culture looks more enabling. Whether the employee is serving customers or working in business development, desk-based or out in the field, the message is: balancing family life with work can of course be challenging but also rewarding, and the employer 'gets it' and wants to help, knowing that the support it provides has a tangible impact on engagement and retention.



Executive mentoring

BY JAMIE WILSON –
MANAGING DIRECTOR,
GROUP SERVICES, CRITICALEYE

BRINGING THE OUTSIDE IN

The challenges and opportunities organisations are exposed to in today's fast-moving and digitally-fuelled business climate have made leadership tougher than ever. The pressures currently being faced within Hospitality, Travel and Leisure businesses are equally seen across other sectors.

Our recent research amongst CEOs, conducted at the annual Criticaleye CEO Retreat 2018, found the majority (86%) of businesses are facing disruption. It also found that less than one-fifth (23%) were fully confident in the executive team's ability to deliver on strategy, and that 50% thought management became too focused on short-term goals when they were tactical rather than strategic.

So how should leaders respond in a world with disruption around every corner? How do they keep their heads above the parapet, keeping one eye on the outside world as well as managing and motivating teams internally? And what is required to develop leaders who are capable of moving into CEO and Board-level positions?

There are plenty of women in management-level roles but numbers do dwindle in the c-suite and boardroom. There are very few female CEOs and Chairs across the sector and women who have been appointed to board positions tend to be NEDs from other industries. Often, in the Hospitality, Travel and Leisure industry especially, women can become very isolated at the top without many obvious role models in sight.

Exposure to people, conversations and ideas outside of our immediate organisation and industry networks have never been more vital to successful management and leadership. Learning from the experiences of others has become as, if not more, important than formal training or learning from academics and experts. There is as much to be gained from an hour with a seasoned executive with reams of experience and stories to tell as there is with a high-end consultancy or industry analyst.

Mentoring has a key role to play in helping leaders overcome the unique leadership challenges they face. A true and effective mentor should be someone who has walked in the shoes of their mentee, who can advise and inspire on the basis of experience and understanding.

The power of mentoring

Mentoring can be invaluable at any stage of your career, but especially when you reach a senior management position. For female leaders who have the capability to move on to an executive committee or CEO role, such support can prove vital. While internal mentoring programmes play a vital role, it's essential not to forget the value of external viewpoints. This becomes especially important as you progress up the leadership ladder and the number of senior individuals internally who can offer advice on leadership style and approach is reduced.

Mentors provide a safe and impartial sounding board – they aren't there to instruct, but rather guide their mentee, make suggestions, tease out questions and ultimately enable them to make their own decisions. They can offer access to their own networks and the benefit of their experience, having faced similar challenges and situations in their own careers.

When, for example, a woman is experiencing imposter syndrome, their mentor may be able to recognise and address the issue, especially if they have been through the same experience. Addressing such roadblocks head-on may help dispel feelings of self-doubt and remove obstacles that might prevent a woman from visualising herself in a more senior role. We believe the most effective mentoring for leaders and senior executives can only be delivered by individuals who can offer experience leaders can relate to. When it comes to mentoring senior executives, both female and male, providing valuable diversity of thought and challenge should enable the mentee to self-reflect and outperform.

External viewpoints

Encouragingly, we know that leaders and executives fully appreciate and understand the value of gaining external insight. In our research, seeking inspiration and fresh thinking from other sectors was the number one area where CEOs felt they needed to improve. Similarly, 94% of CEOs told us business performance is improved when executives have access to reference points outside their organisation and sector. A clear message from the top about the value of bringing the outside in.

Also in the research, 94% said that external mentoring improves the performance of senior executives. It reinforces what is discussed frequently within our peer to peer community – that understanding the world outside your business, how other organisations and sectors are tackling challenges and which disruptors could potentially challenge your operation is more important than ever.

Crucially, external mentoring should encourage high-potential female employees to believe in themselves and in their ability to contribute to the success of their organisations.

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WiH2020
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Upcoming WiH2020
Masterclasses

- 11th March 2019**

Positioning and preparing: securing your first Executive Committee role and CV refresher

Elliott Goldstein (Partner, The MBS Group) and Tea Colaianni (Chair, WiH2020)
- 14th March 2019**

7 reasons why being on a Board is good for your career

Fiona Hathorn (Managing Director, Women on Boards UK) and Tea Colaianni (Chair, WiH2020)
- 30th April 2019**

Be conscious of your unconscious bias

Kirsty Rogers (Partner, DWF LLP) and Tea Colaianni (Chair, WiH2020)
- 14th May 2019**

Retaining and attracting women: enabling parents and careers

Jennifer Liston-Smith (Director, My Family Care) and Tea Colaianni (Chair, WiH2020)
- 12th June 2019**

Measure diversity and inclusion for maximum business impact

Jon Terry (Diversity and Inclusion Consulting Leader, PwC) and Tea Colaianni (Chair, WiH2020)
- To book your place or find out more details about the upcoming WiH2020 masterclasses, please visit: www.wih2020.com/news-events

About WiH2020

WiH2020 is the most influential collaboration platform of leaders across the Hospitality, Travel and Leisure sector and is devoted to increasing women's representation and diversity as a whole in leadership positions across the HTL sector. We believe that through collaboration we can amplify the impact of individual diversity initiatives, together we can have a bigger, louder voice for the good of the industry. For more information, please visit: <https://www.wih2020.com>

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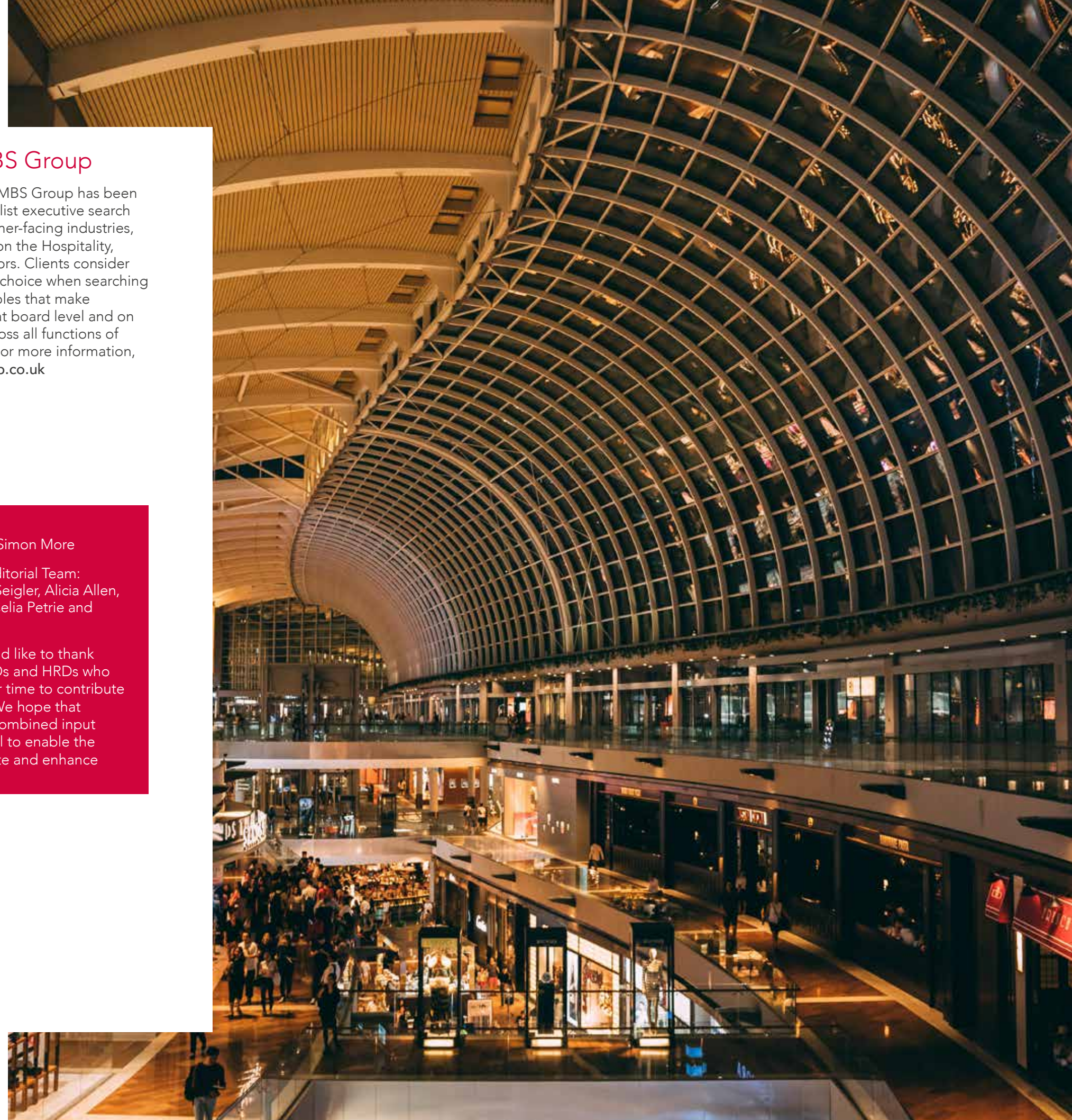
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For over 30 years, The MBS Group has been a leading sector-specialist executive search firm advising all consumer-facing industries, with a particular focus on the Hospitality, Travel and Leisure sectors. Clients consider us to be the partner of choice when searching for critical leadership roles that make a difference. We work at board level and on executive positions across all functions of strategic importance. For more information, visit www.thembsgroup.co.uk

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