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Insights

Leading at the front(line):

Diversity, equity, and inclusion imperatives

Key findings from the 2022 Diversity, equity, and inclusion amongst frontline workers study

August 2022

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Executive summary

INTRODUCTION

Companies in the consumer sector have weathered a plethora of pandemic-related challenges, including the "Great Resignation," which has resulted in historic levels of employee turnover, especially with respect to frontline workers.[1] Often comprised of a group of individuals with diverse backgrounds and experiences, frontline workers play a vital role in driving organizational productivity and customer engagement. However, there has been relatively limited primary research conducted to date that focuses on frontline staff and their experience of diversity, equity, and inclusion (DEI) challenges.

As such, Deloitte has embarked on a research program designed to identify specific barriers and improvement opportunities for companies looking to create more equitable and inclusive experiences for frontline workers. Among other tangible benefits, making DEI "real" for the front line can unlock an individual's full potential to create compelling experiences for customers, driving critical business outcomes, including satisfaction and loyalty.

Efforts to promote and sustain DEI initiatives at all levels of an organization also represent a key opportunity for businesses to differentiate themselves in a hypercompetitive market when it comes to attracting and retaining frontline talent.

The goal of this research effort is to help consumer companies engage in a holistic conversation about building more equitable and inclusive workplaces for all frontline employees.

ABOUT THE STUDY

Deloitte surveyed over 3,000 frontline workers in the United States between April 6 and April 21, 2022. The data gathered represents the opinions of workers across a variety of consumer industries, including automotive, consumer products, retail, travel, food service, and hospitality.

[1] Christine Trodella, "It's time for the C-suite to prioritize frontline workers—or risk losing nearly half of their workforce," *Fortune*, March 29, 2022.

Executive summary

KEY FINDINGS

Only one-third of frontline workers (34%) feel they can always be their authentic selves at work.

Only 64% of frontline workers feel a sense of belonging at their company.

32% of frontline workers have felt discriminated against by a coworker.

Nearly a quarter of women and a third of Black frontline workers report having been discriminated against by either a customer or coworker, on the basis of their gender and race/ethnicity, respectively. Only half of Black and Hispanic workers report having *not* been the victim of some form of discrimination.

Only 56% of frontline workers feel their company provides effective sponsorship whereby established leaders advocate for more junior employees.

Less than a third (31%) of frontline workers feel their company is very accepting of family and/or personal commitments.

Only 38% of frontline workers think their company's DEI initiatives are truly focused on creating a better workplace for all.

The retail sector significantly lags other consumer sectors, including automotive, consumer products, and travel/hospitality, when it comes to the percentage of frontline workers who are satisfied with their job, supervisors, and their company's senior management team.

The path to career advancement within a company is clearer for more men (92%) than women (85%).

Less than half of women (47%) feel their company provides effective sponsorship opportunities compared to nearly two-thirds of men (64%).

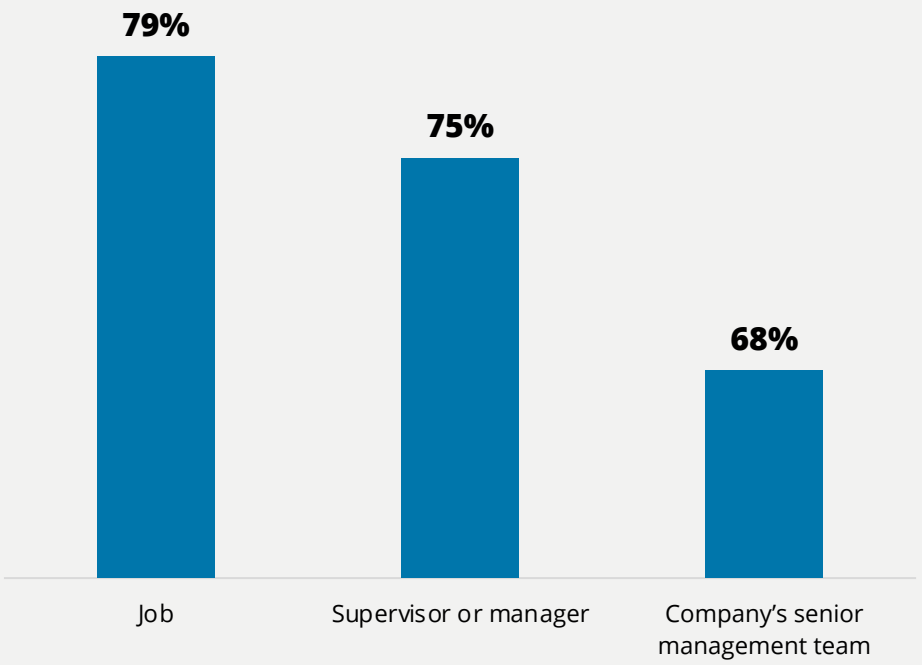
Despite having a similar level of access to necessary tools (74% of women vs. 78% of men), noticeably fewer women report having access to training (68% vs. 78%) or clear lines of communication to obtain timely feedback or share ideas (63% vs. 74%), signaling an important area for improvement to support the career progression of female workers on the front line.

Employee satisfaction and trust

Satisfaction

Eight in 10 frontline workers are satisfied with their jobs. However, they are significantly less satisfied with their company's senior leadership team. Scores also deteriorate as the size of the company increases, making it difficult for frontline workers to buy into cultural changes that flow from the top.

Percentage of workers who are satisfied/very satisfied with their ...



By company size (# of employees)

	250 999	1,000 4,999	5,000+
Job	88%	77%	71%
Supervisor or manager	86%	72%	66%
Company's senior management team	81%	68%	**52%**

By consumer industry

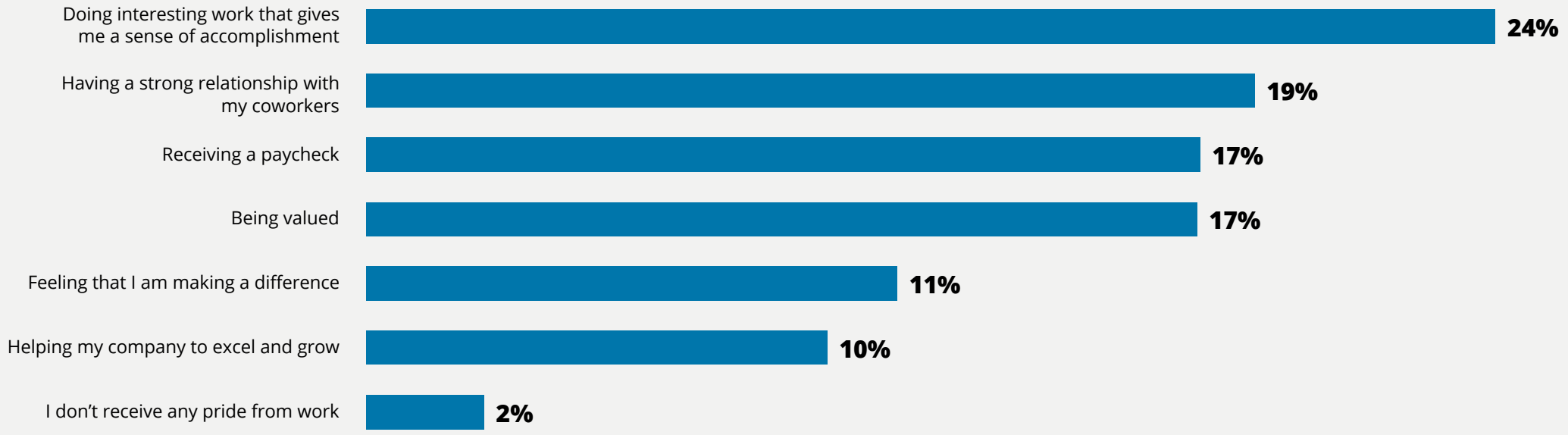
	Automotive	Consumer products	Transportation, travel & hospitality	Retail
Job	86%	83%	79%	74%
Supervisor or manager	79%	79%	75%	72%
Company's senior management team	79%	77%	65%	**59%**

Notes: Prefer not to answer responses not considered | Q27. How satisfied are you with the following? | Sample size: N = 2,805.

Pride at work

Frontline workers find the most pride in doing interesting work, but an emphasis on having a strong relationship with coworkers and a sense of being valued point to the need for a robust company culture rooted in DEI.

Percentage of workers who find the most pride at work from ...

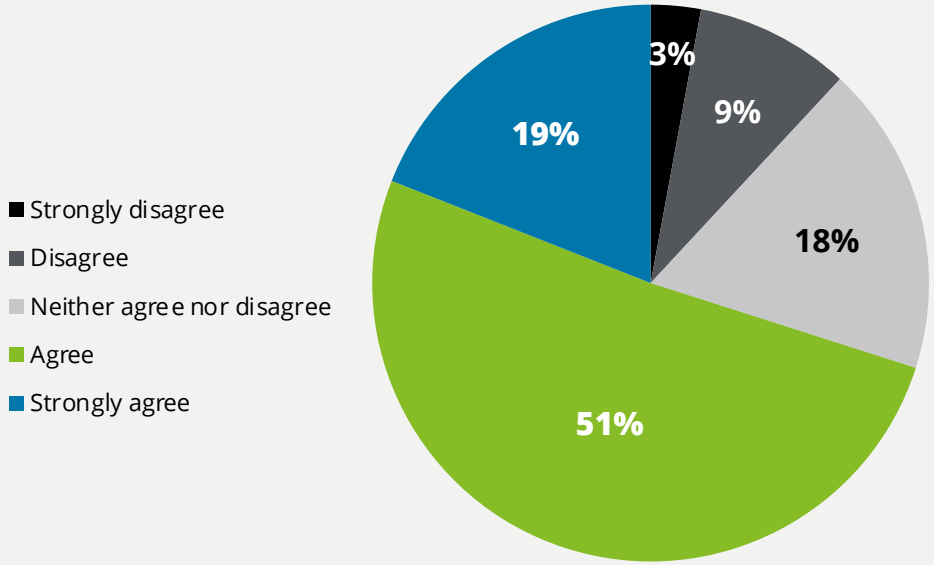


Notes: Q29. I find the most pride at work from the following... | Sample size: N = 3,005.

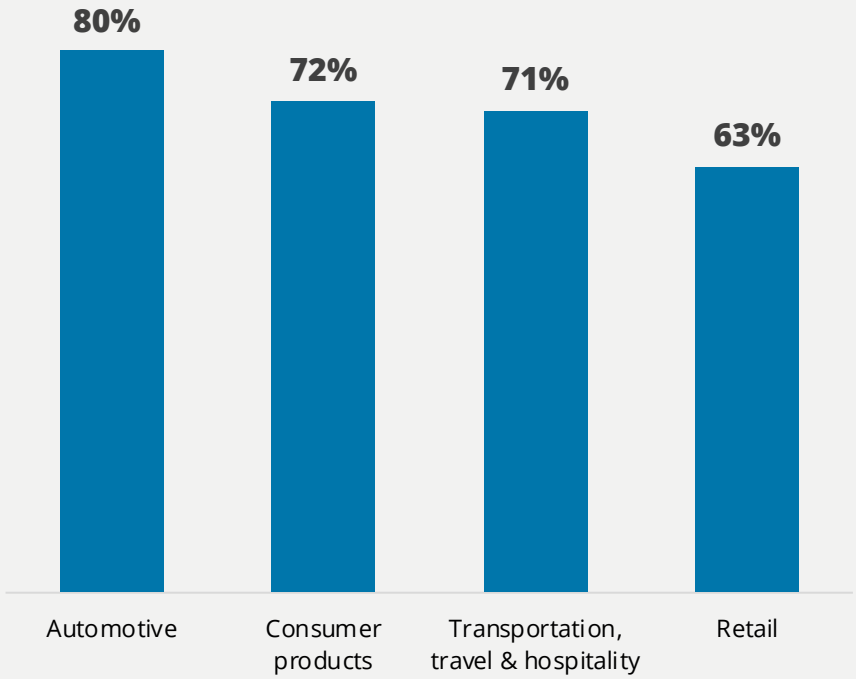
Challenge and satisfaction

Seven in 10 frontline employees find their work challenging and interesting. However, this is only one facet of creating employee engagement, and not all consumer industries are equal as the retail sector lags, perhaps contributing to relatively lower employee satisfaction scores in that sector.

Percentage of workers who agree or disagree that their work is challenging



By industry (% agree/strongly agree)

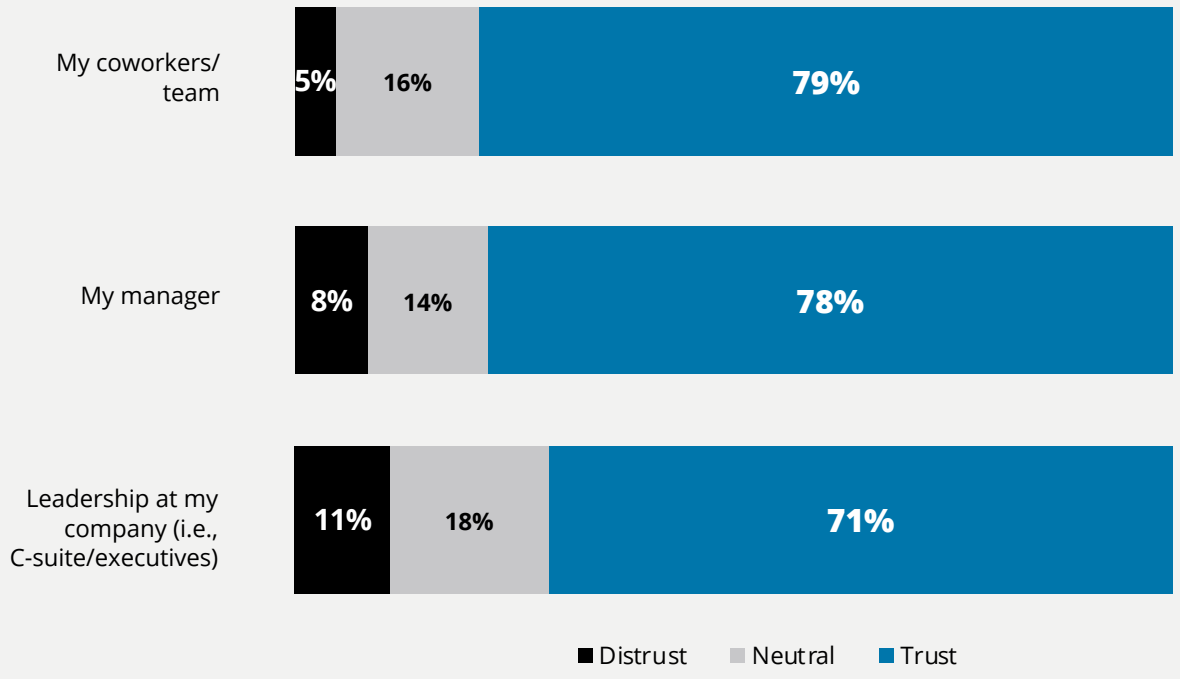


Notes: Q18. How much do you agree or disagree with this statement, "I find my day-to-day work challenging and interesting"? | Sample size: N = 3,005.

Organizational trust

Satisfaction scores also align with the level of trust that frontline workers feel for different groups within their organization—a key opportunity for companies to leverage in order to make positive change. Unsurprisingly, trust diminishes as the organizational distance from the employee increases.

Extent of trust frontline workers place in ...



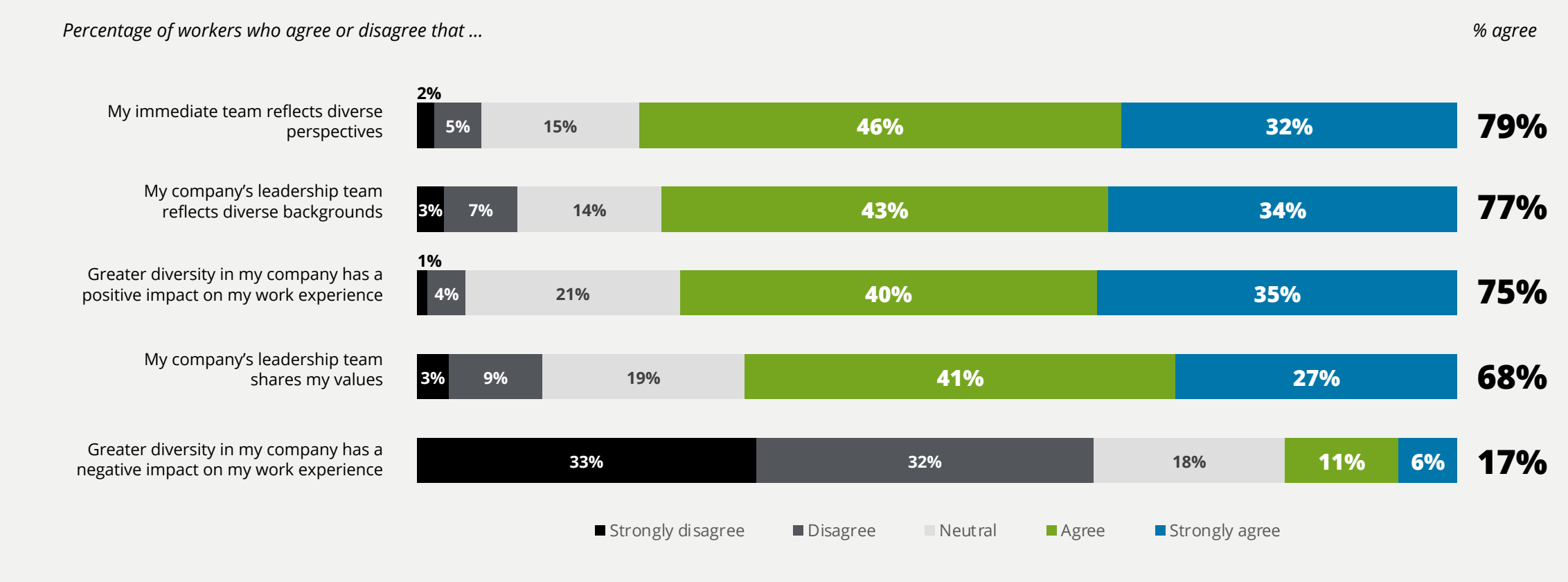
By company size (# of employees)

	250 999	1,000 4,999	5,000+
My coworkers/ team	84%	78%	74%
My manager	86%	78%	70%
Leadership at my company (i.e., C-suite/executives)	84%	72%	57%

Notes: Distrust includes “highly distrust” or “distrust”; trust includes “highly trust” or “trust”; prefer not to answer responses not considered. Small/medium companies = 250–999 employees, large companies = 1,000–4,999 employees, very large companies = 5,000 or more employees. | Q13. Each of us trusts various people to different extents. How much do you trust the following people? | Sample size: N = 2,988.

Diversity and values

Only 68% believe their leaders share their values, making it challenging for company management to connect with frontline workers to better understand their lived experience.

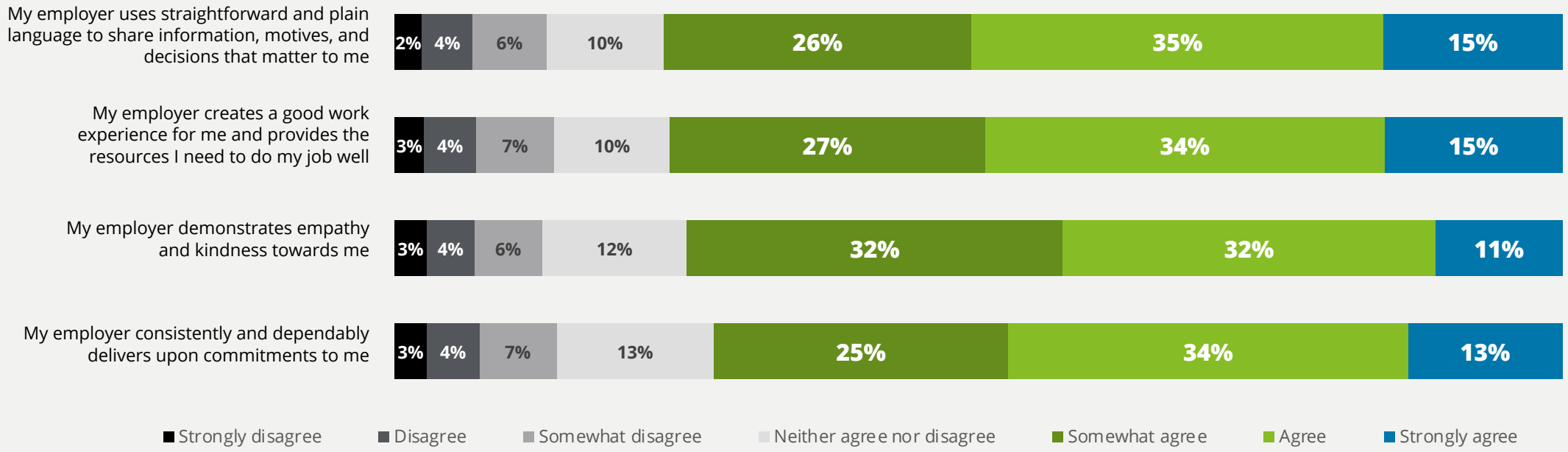


Notes: Prefer not to answer responses not considered | Q26. To what extent do you agree or disagree with the following statements? | Sample size: N = 2,986.

Satisfaction and trust drivers

Three-quarters of frontline workers agree or somewhat agree that their employer is empathetic, straightforward, meets commitments, and provides a good work experience, but only around one in 10 strongly agree with these statements, signaling room for improvement.

Percentage of workers who agree or disagree that …

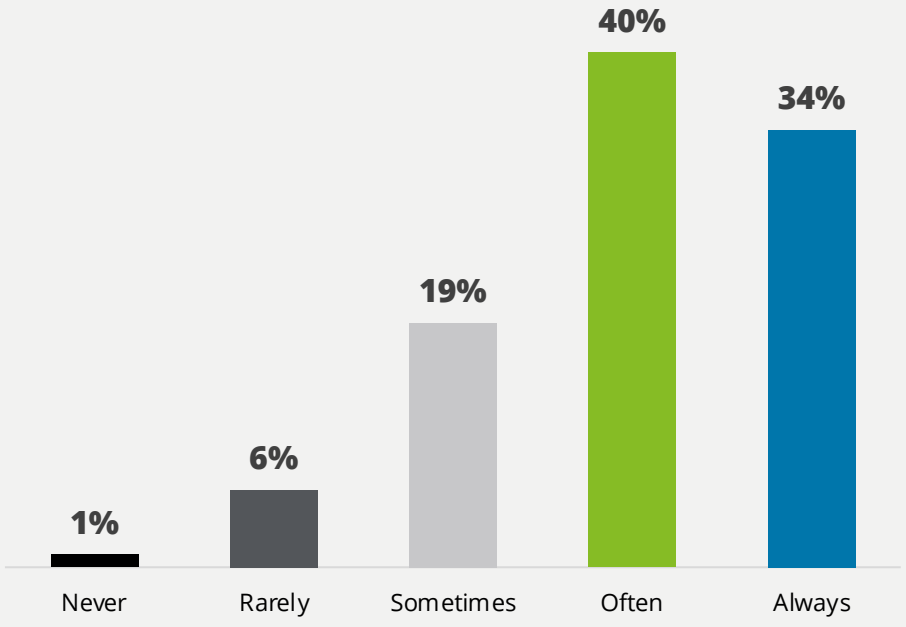


Notes: Prefer not to answer responses not considered | Q15. Do you agree or disagree with the following? | Sample size: N = 3,005.

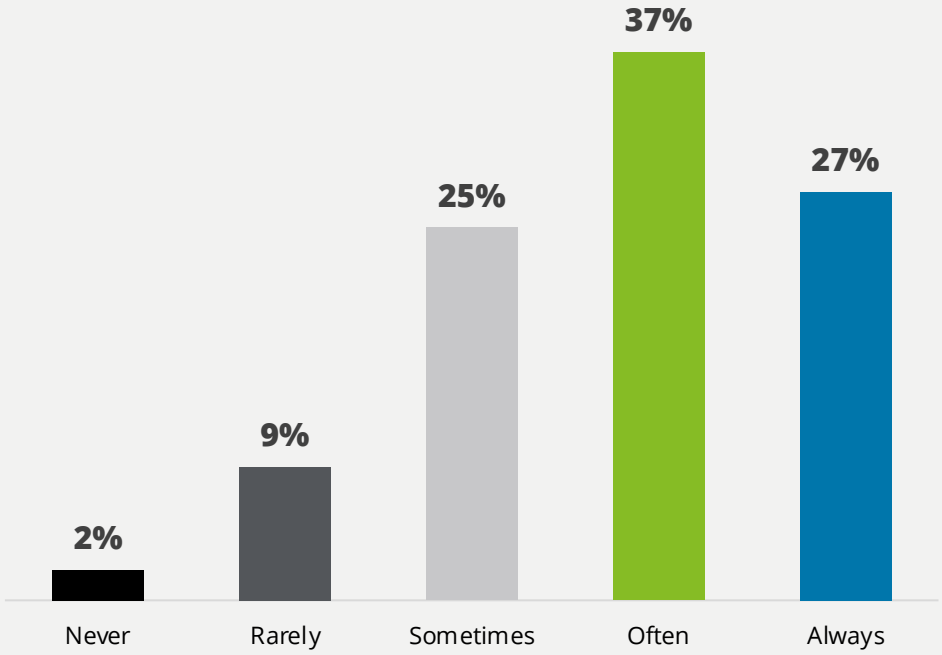
Authenticity and belonging

However, only a third of frontline workers feel they can always be their authentic selves at work and only a quarter feel a sense of belonging, which may lead them to employ “covering” techniques to fit in, diminishing their ability to bring their full set of talents and enthusiasm to the workplace.

Percentage of workers who feel they can be their authentic selves at work…



Percentage of workers who feel a sense of belonging at their company …

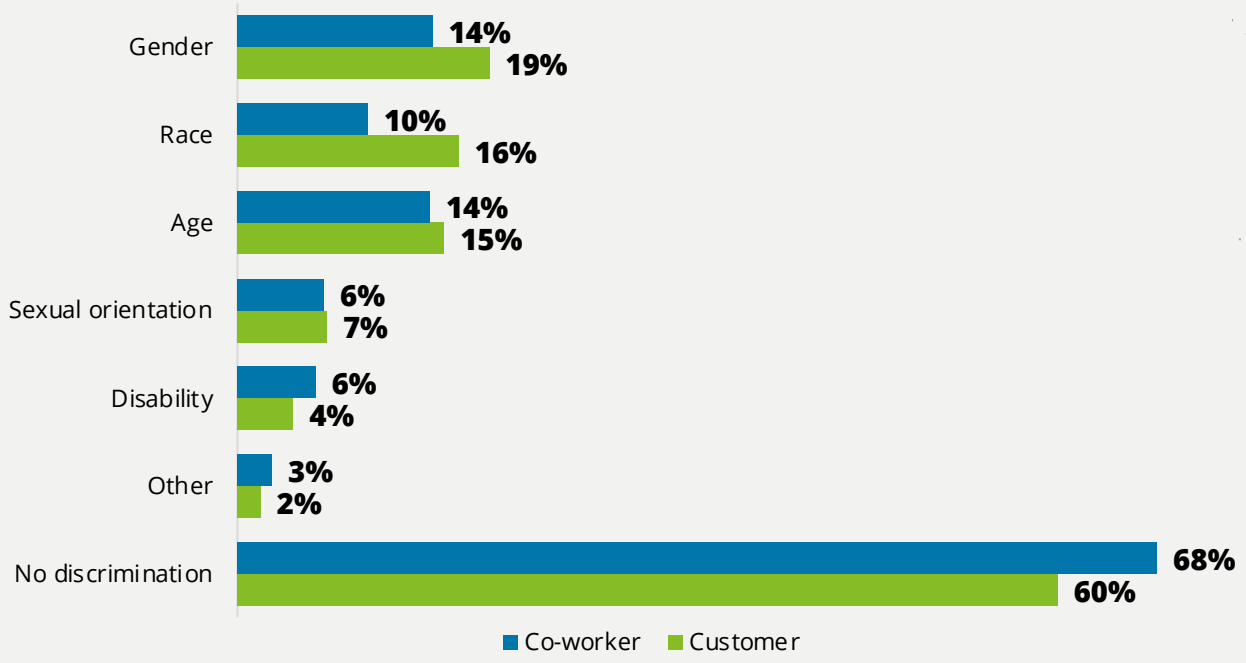


Notes: Q28. I can be my authentic self (i.e., all of who I want to be) at work; Q36. How often do you feel a sense of belonging at your company? | Sample size: N = 3,005.

Discrimination and support

One-third of frontline workers report having been discriminated against by coworkers or customers. Nearly a third did not feel supported by another colleague when they were discriminated against by a coworker (rising to four in 10 at companies with at least 5,000 employees).

Percentage of workers who felt discriminated against (by customer/coworker) based on ...



Percentage of workers supported by another colleague when they felt discriminated against by a coworker

		By company size (# of employees)		
	Study avg.	250 999	1,000 4,999	5,000+
Yes	71%	80%	74%	60%
No	29%	20%	26%	40%

Notes: Responses do not add to 100% as it is a multiselect question | Q37. Have you ever felt discriminated against by a coworker based on one or more of the following (select all that apply); Q38. Have you ever felt discriminated against by a customer based on one or more of the following (select all that apply); Q39. Did you feel supported by another colleague (i.e., an ally) in that moment? | Sample size: N = 3,005 [Q37]; 2,257 [Q38]; 970 [Q39].

Ethnicity discrimination

Nearly a quarter of women and a third of Black frontline workers report having been discriminated against by either a customer or coworker, on the basis of their gender and race/ethnicity, respectively. Only half of Black and Hispanic workers report having *not* been the victim of some form of discrimination.

		Age group			Gender		Race/ethnicity			
Percentage of frontline workers who felt discriminated against (by customer/coworker) based on ...	**Study avg.**	**18 34**	**35 54**	**55+**	**Women**	**Men**	**Asian/Pacific Islander**	**Black/ African American**	**Hispanic/ LatinX**	**White**
Race/ethnicity	12%	14%	13%	9%	15%	11%	21%	**33%**	19%	8%
Gender	16%	22%	16%	8%	**23%**	10%	16%	18%	17%	16%
Age	15%	20%	12%	14%	15%	14%	14%	15%	16%	14%
Sexual orientation	6%	8%	7%	3%	6%	7%	5%	7%	9%	6%
Disability	5%	6%	5%	2%	5%	5%	2%	4%	8%	5%
Other	2%	2%	2%	4%	3%	2%	1%	0%	3%	2%
I have not felt discriminated against	65%	57%	67%	71%	60%	69%	63%	**56%**	**52%**	68%

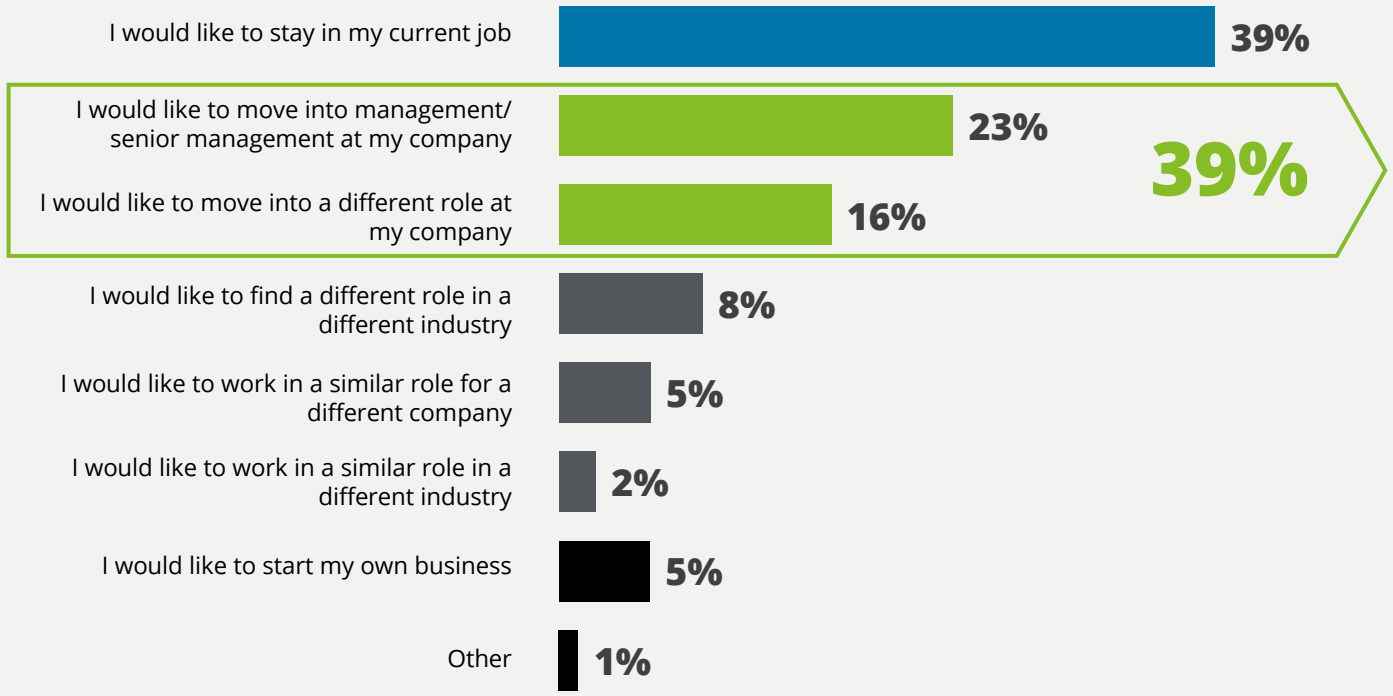
Notes: Q37. Have you ever felt discriminated against by a coworker based on one or more of the following (select all that apply); Q38. Have you ever felt discriminated against by a customer based on one or more of the following (select all that apply) | Sample size: N = 3,005 (overall); 868 (18–34); 1,643 (35–54); 494 (55 and above); 1,272 (women); 1,704 (men); 81 (Asian/Pacific Islander); 300 (Black/African American); 324 (Hispanic/LatinX); 2,217 (White/Caucasian).

Retention and advocacy

Career plans

Nearly four in 10 frontline workers want to shift their role or move into management at their current company. However, seeing a clear path to achieve these career goals can be a challenge for some (particularly women).

Plan for role/career



Percentage of workers who see a path to reach their goals within their current company

	Study avg.	Women	Men
Yes	89%	85%	92%
No	10%	14%	7%
Already achieved	1%	1%	1%

90% of frontline employees of companies with 250–999 workers say they can see a path to achieve their career goals with their current employer (including those people that would like to stay in their current role). This percentage drops to 82% of frontline employees at companies with an overall workforce of 1,000–4,999 individuals, and 74% among workers at very large companies (5,000 employees or more).

Notes: Q19. What is your plan for your role/career? | Sample size: N = 3,005 | Q21. Do you see a path to get to your goal(s) within your current company? | Sample size: N = 2,332.

Career plans

A significantly lower percentage of younger frontline workers want to stay in their current job and a higher proportion of them would like to find a different role in another industry altogether, highlighting the key challenge of retaining talent.

		Age group			Gender		Race/ethnicity			
Plan for role/career	Study avg.	18 34	35 54	55+	Women	Men	Asian/Pacific Islander	Black/ African American	Hispanic/ LatinX	White
I would like to stay in my current job	39%	28%	38%	59%	35%	41%	33%	23%	37%	41%
I would like to move into management/ senior management at my company	23%	24%	28%	7%	20%	25%	22%	26%	34%	21%
I would like to move into a different role at my company	16%	17%	17%	11%	15%	17%	23%	17%	11%	16%
I would like to find a different role in a different industry	8%	13%	6%	7%	12%	5%	14%	14%	7%	8%
I would like to work in a similar role for a different company	5%	6%	5%	5%	7%	4%	5%	7%	3%	5%
I would like to work in a similar role in a different industry	2%	2%	2%	3%	2%	2%	0%	1%	2%	2%
I would like to start my own business	5%	8%	4%	4%	7%	4%	2%	11%	5%	5%
Other	1%	1%	0%	4%	1%	1%	0%	1%	0%	1%

Notes: Q19. What is your plan for your role/career? | Sample size: N = 3,005 (overall); 868 (18–34); 1,643 (35-54); 494 (55 and above); 1,272 (women); 1,704 (men); 81 (Asian/Pacific Islander); 300 (Black/African American), 324 (Hispanic/LatinX); 2,217 (White/Caucasian).

Critical career objectives

Competitive pay and work/life balance are the most critical career objectives for frontline workers, but a focus on “working with great people” signals the importance of creating better work environments for all employees.

Most important career objectives

Notes: Responses do not add to 100% as it is a multiselect question. | Q22. Thinking about your career in general, which of the following objectives are most important to you? (please select all that apply) | Sample size: N = 3,005.

Critical career objectives

Below the surface, both women and Asian workers are comparatively more focused on income and benefits, work/life balance, and the quality of their relationships with coworkers, which may inform a more nuanced strategy when creating talent acquisition and retention programs.

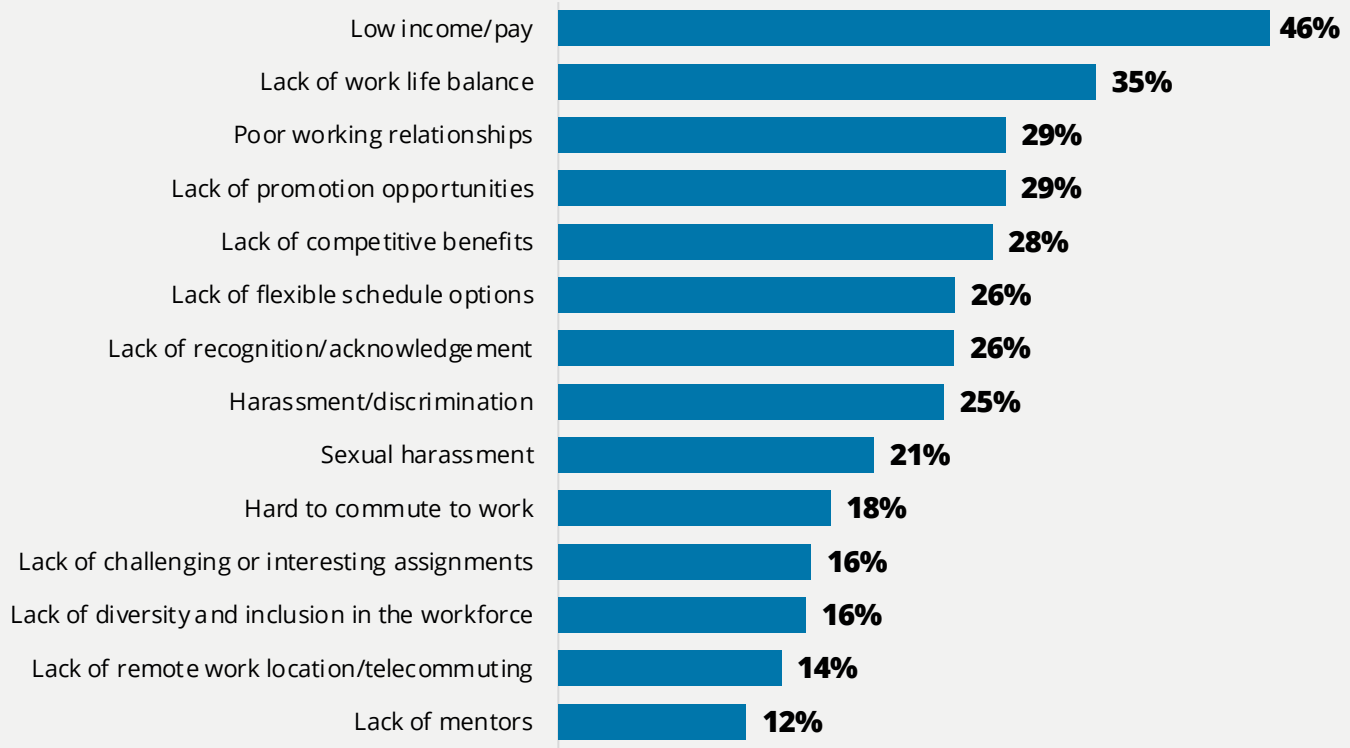
		Age group			Gender		Race/ethnicity			
Most important career objectives	Study avg.	18 34	35 54	55+	Women	Men	Asian/Pacific Islander	Black/ African American	Hispanic/ LatinX	White
Competitive income/pay	57%	53%	54%	74%	66%	51%	69%	54%	48%	58%
Work/life balance	57%	60%	52%	68%	66%	51%	63%	54%	45%	59%
Attractive benefits	50%	50%	47%	63%	55%	46%	59%	58%	38%	50%
Working with great people	50%	52%	46%	57%	59%	43%	62%	53%	44%	49%
Flexible schedule	47%	52%	43%	54%	59%	38%	54%	51%	41%	47%
Career progression opportunities	37%	45%	38%	21%	40%	36%	42%	42%	40%	36%
Learning and development opportunities	36%	39%	38%	22%	40%	33%	42%	44%	37%	34%
Opportunities for challenging and interesting responsibilities	35%	37%	34%	32%	37%	33%	36%	37%	32%	34%
Flexible work location	31%	32%	32%	25%	34%	29%	44%	36%	35%	29%
Company culture	31%	32%	30%	34%	33%	29%	40%	30%	33%	31%
Opportunity to work at a “household name” company	13%	12%	13%	13%	11%	14%	25%	14%	15%	12%

Notes: Q22. Thinking about your career in general, which of the following objectives are most important to you? (Please select all that apply) | Sample size: N = 3,005 (overall); 868 (18–34); 1,643 (35–54); 494 (55 and above), 1,272 (women); 1,704 (men); 81 (Asian/Pacific Islander); 300 (Black/African American); 324 (Hispanic/LatinX); 2,217 (White/Caucasian).

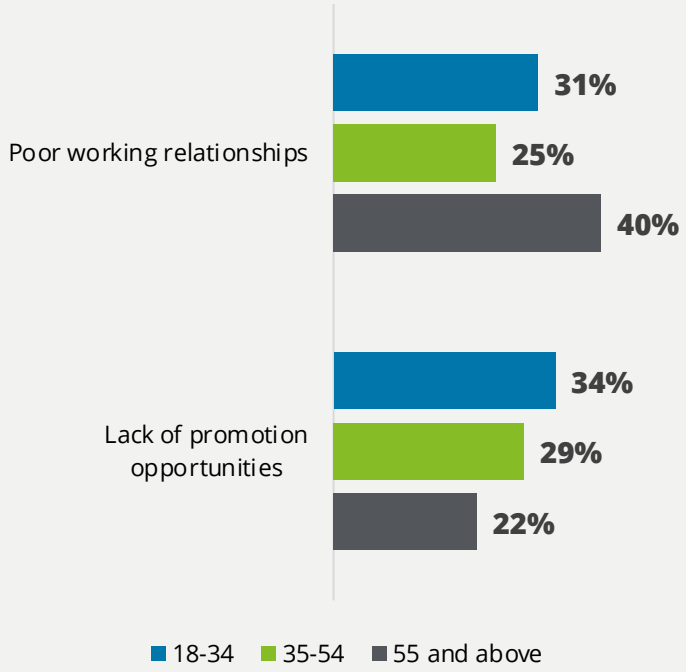
Industry withdrawal

Aside from compensation, a lack of work/life balance and poor working relationships are among the top issues that would cause frontline workers to leave their industry.

Top issues that would cause you to leave your industry



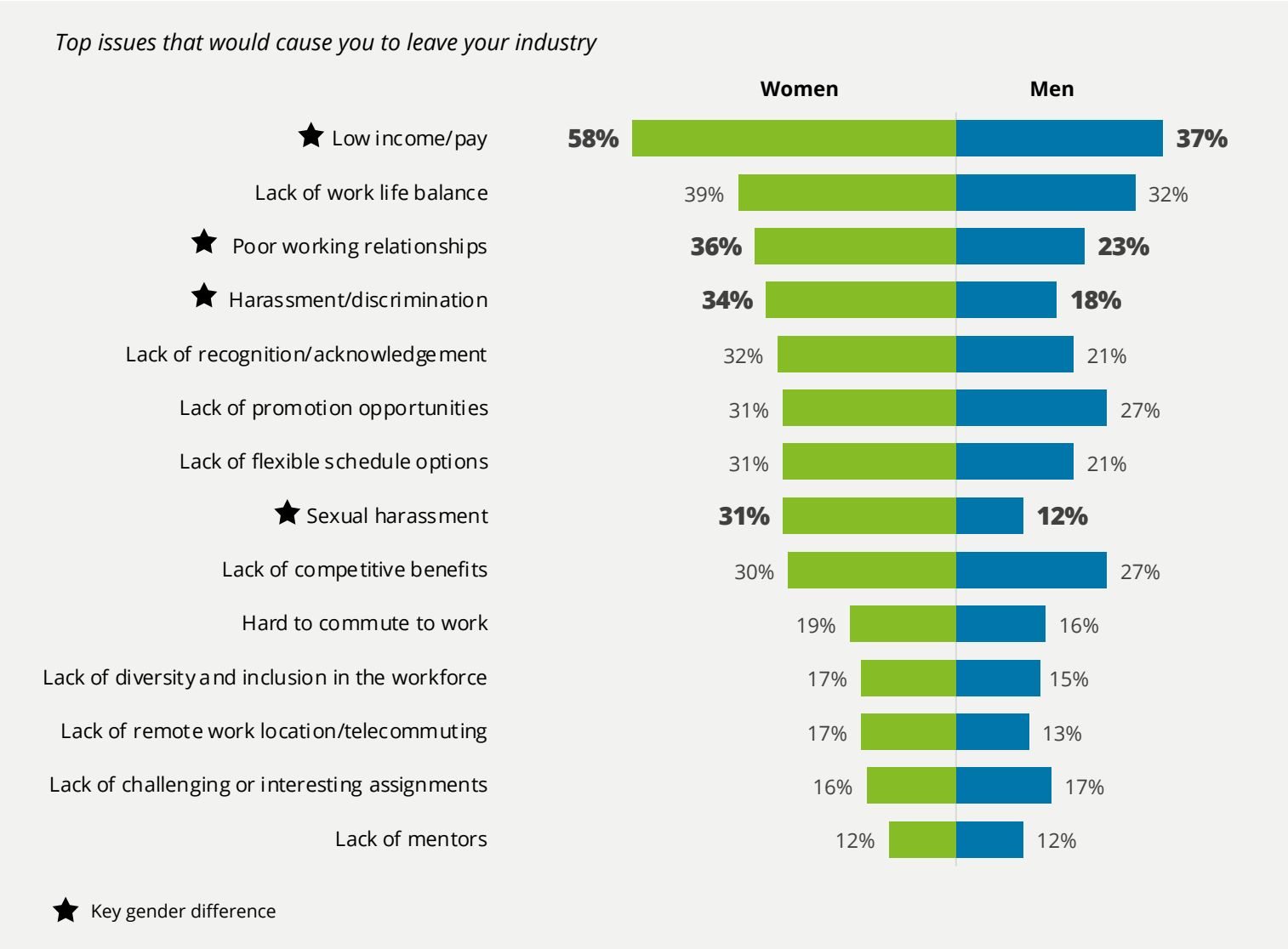
Younger workers are relatively more likely to leave for lack of career growth while poor working relationships make older workers leave.



Notes: Responses do not add to 100% as it is a multiselect question. | Q24. In your opinion, what are the top issues that would cause you to consider leaving your industry? (please select all that apply) | Sample size: N = 3,005 (overall); 868 (18–34); 1,643 (35–54); 494 (55 and above).

Industry withdrawal

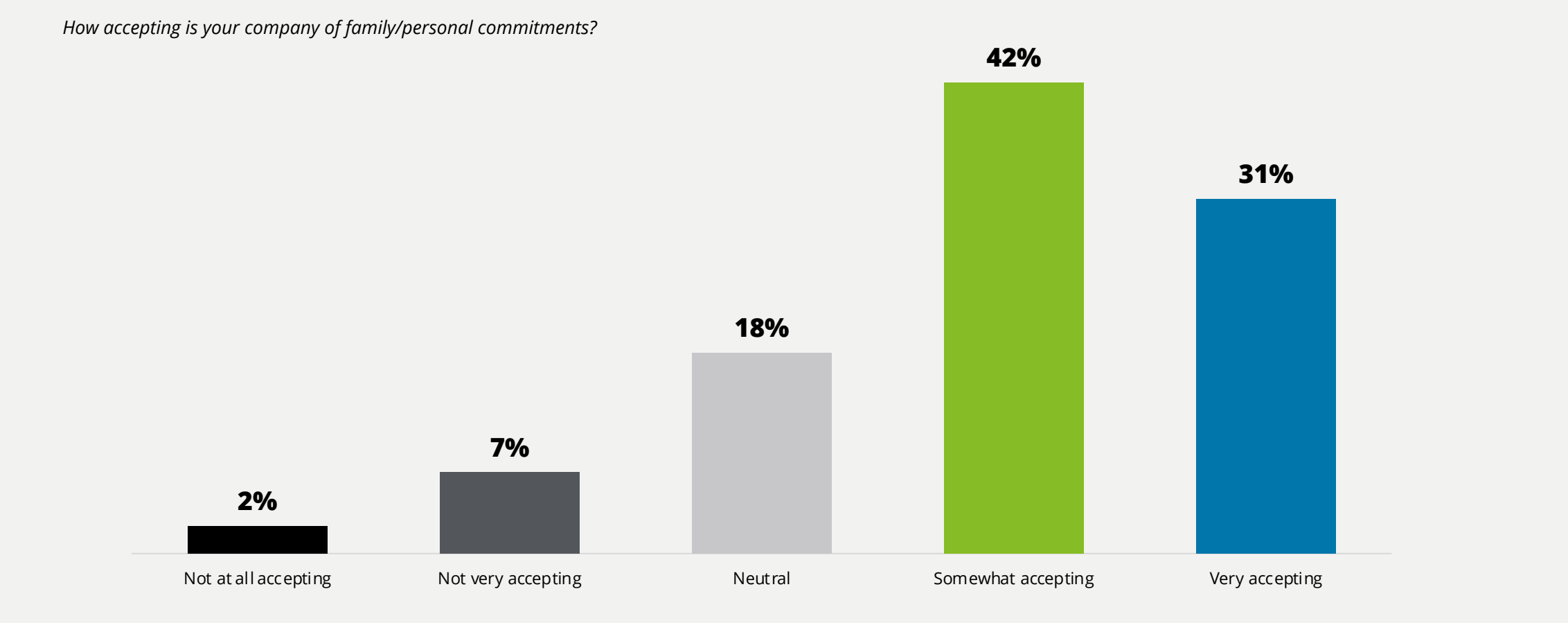
Issues related to pay, quality of working relationships, discrimination, and sexual harassment are significantly more likely to drive women to leave their industry than men.



Notes: Responses do not add to 100% as it is a multiselect question. Nonbinary/nongender conforming responses not shown (insufficient sample size). | Q24. In your opinion, what are the top issues that would cause you to consider leaving your industry? (please select all that apply) | Sample size: N = 1,272 (women); 1,704 (men).

Personal commitments

Less than a third of frontline workers think their company is *very accepting* of family commitments, potentially contributing to a lack of work/life balance and subsequent employee churn.

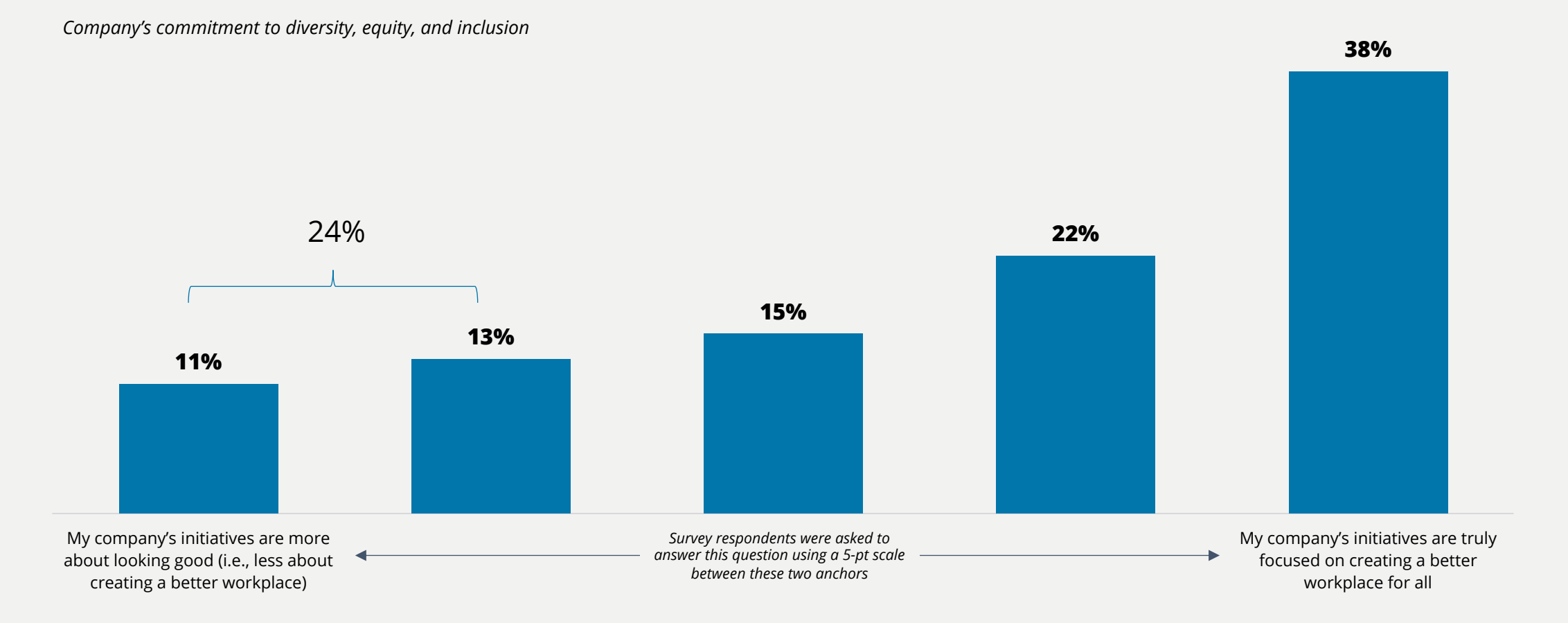


Notes: Q50. How accepting is your company of family/personal commitments? | Sample size: N = 3,005.

Charting a path forward

Company DEI commitment

Only 38% of frontline workers think their company's DEI initiatives are truly focused on creating a better workplace for all, while a quarter think these efforts are more about looking good, clearly signaling a need for improvement across consumer industries.

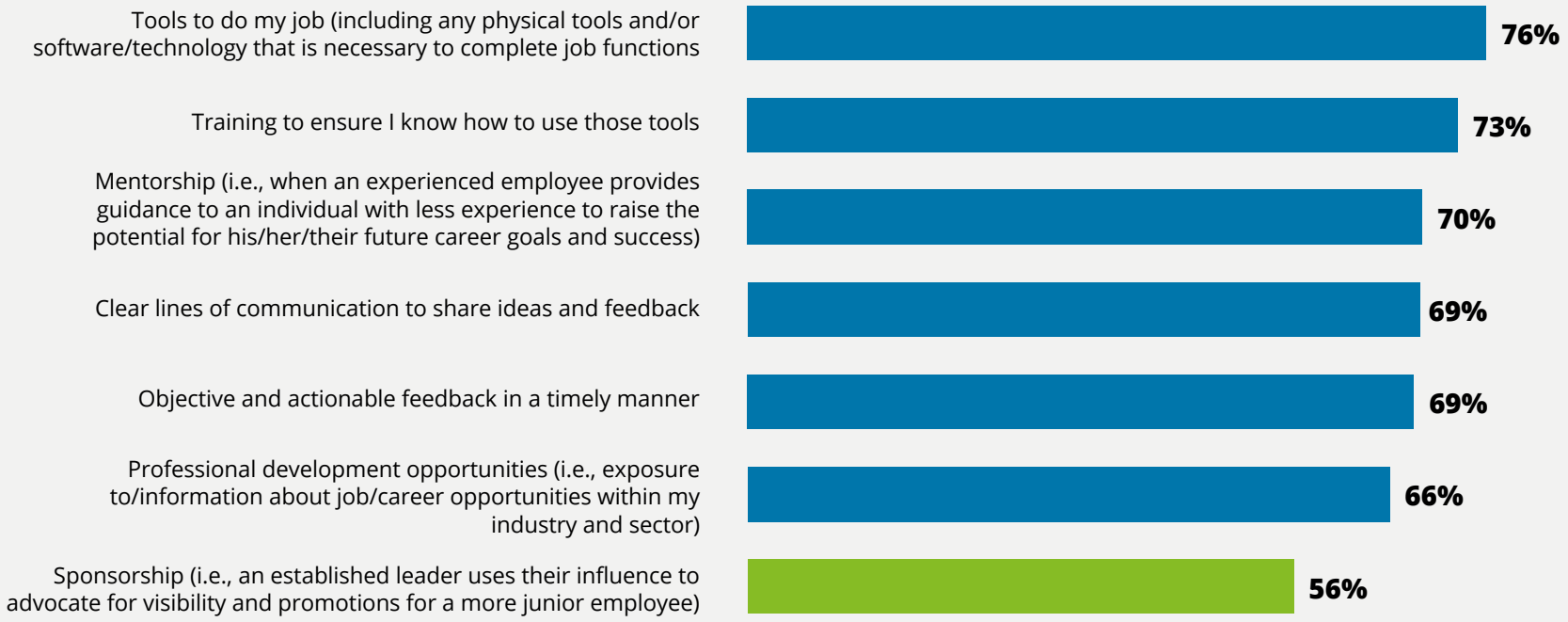


Notes: Q55. Which best represents your company's commitment to diversity, equity, and inclusion? | Sample size: N = 3,005.

Sponsorship vs. mentorship

Only half of frontline workers think their company provides effective sponsorship programs, pinpointing a critical miss to offer tangible career advancement support for historically marginalized people.

Percentage of workers who agree that their company effectively provides …



Only 55% of frontline employees of very large corporations (5,000 employees or more) indicate their company provides effective mentorship programs compared to 85% of workers whose companies employ 250–999 people.

This difference is even more acute when it comes to sponsorship programs, where only 39% of people working for very large companies feel sponsorship programs are effective (vs. 73% of people working for companies employing 250–999 workers).

Notes: Q47. To what extent do you agree your company effectively provides you with the following? | Sample size: N = 2,986.

Sponsorship vs. mentorship

Sponsorship opportunities are not geared to all frontline workers equally as less than half of women give their company a passing grade on this front, compared to nearly two-thirds of men.

		Age group			Gender		Race/ethnicity			
Percentage of consumers who agree that their company effectively provides …	**Study avg.**	**18 34**	**35 54**	**55+**	**Women**	**Men**	**Asian/Pacific Islander**	**Black/ African American**	**Hispanic/ LatinX**	**White**
Mentorship	70%	71%	74%	53%	63%	75%	63%	75%	73%	69%
Tools to do my job	76%	77%	78%	69%	74%	78%	74%	82%	81%	75%
Training to ensure I know how to use those tools	73%	73%	77%	62%	68%	78%	76%	79%	76%	72%
Clear lines of communication to share ideas and feedback	69%	69%	73%	59%	63%	74%	70%	71%	73%	69%
Objective and actionable feedback in a timely manner	69%	68%	73%	55%	63%	74%	59%	72%	73%	68%
Professional development opportunities	66%	66%	71%	51%	60%	71%	63%	73%	68%	65%
Sponsorship	56%	54%	64%	36%	**47%**	64%	49%	62%	62%	55%

Notes: Q47. To what extent do you agree your company effectively provides you with the following? | Sample size: N = 857 (18–34); 1,636 (35–54); 491 (55+); 1,270 (women); 1,689 (men); 79 (Asian/Pacific Islander); 296 (Black/African American); 319 (Hispanic/LatinX); 2,195 (White/Caucasian).

Summary

Where are consumer companies falling short when it comes to implementing effective DEI programs for frontline workers?

Employee satisfaction scores and trust in leadership **deteriorate** as the size of company increases, making it difficult for frontline workers to buy into changes in corporate culture that flow from the top of the organization.

Frontline workers who don't feel they can be their **authentic selves** at work may feel compelled to employ "covering" techniques as a coping mechanism to fit in, which may impede their ability to bring their full talent to the workplace and negatively impact the customer experiences they create.

One-third of frontline workers have been **discriminated against** by a coworker and nearly a third of those individuals did not feel supported by another colleague in that moment (rising to four in 10 people who work at companies with at least 5,000 employees).

Only **28%** of younger frontline workers want to stay in their current job and another **30%** would like to leave their current company, highlighting the key **challenge of retaining frontline talent.**

Aside from **compensation**, a **lack of work/life balance** and **poor working relationships** are among the **top issues** that would cause frontline workers to leave their industry.

Only **38%** of frontline workers think their company's DEI initiatives are **truly focused** on creating a better workplace for all, while a quarter think these efforts are more about **looking good**, clearly signaling a **need for improvement** across consumer industries.

Only **half** of frontline workers think their company provides **effective sponsorship programs**, pinpointing a **critical miss** to offer tangible career advancement support for historically marginalized people.

Here are a few things to consider:

As consumer companies struggle to meet a long list of challenges, more can be done to promote and sustain DEI at all levels of an organization to provide a compelling proposition when it comes to attracting and retaining frontline talent.

1

Make DEI come alive for all workers

DEI programs and initiatives designed at the corporate level may not be flowing down to workers on the frontline. Build a DEI program specifically with the needs of frontline staff in mind and engage them throughout the design.

2

Recognize and align to organizational differences

Equip field managers to activate and drive DEI at the regional and individual business unit level of the company to account for organizational differences that can affect critical outcomes.

3

Elevate DEI accountability

Company leadership should communicate DEI as a priority and shared responsibility for all departments in the organization (i.e., send a clear signal DEI is more than simply an HR issue by tying performance management to DEI goals).

4

Focus on sponsorship vs. mentorship

Move beyond a focus on mentorship programs to have senior leaders engage in more impactful sponsorship behavior to actively support the career progression of diverse employees on the frontline.

5

Live the DEI mission

Align the lived experience among frontline employees with external messaging around DEI to build trust with the company's workforce. This can lead to better employee engagement, support productivity gains, and help create more compelling customer experiences.

What informs the workforce experience?

As companies strive to better understand the lived experience of their frontline staff, more focus could be placed on the following eight key relationships that affect how a person feels throughout their journey with an organization.

THE PEOPLE I WORK WITH

The people I serve, manage, report to, collaborate with, partner and team with, and engage with

THE TECHNOLOGY I USE

The technology that connects me to my work, workforce, and workplace

THE PLACES I DO WORK

The places where I do work and the physical space in which work gets done

THE SENSE OF BELONGING I FEEL

The sense of belonging and worthiness that my organization creates as a diverse, equitable, and inclusive community and as a member of our broader world

THE WORK I DO

The work I do, my ways of working, the norms, methods and tools I use to get work done, the teams I work with, and how my work strengthens me

HOW WORK AFFECTS MY LIFE

The well-being of my personal life, rewards and well-being, goals, and worldview, and how my worthiness is reflected by the organization

THE COMPANY MISSION

The mission, purpose, culture, and leadership behaviors of the organization and how my organization helps connect me with society

HOW I GROW AS A HUMAN

The education, experiences, and exposure I receive support my growth and identity, align to my values, and give me purpose and a sense of belonging

Deloitte's DEI maturity model

One of the first steps consumer companies can take is to conduct a self-assessment of performance on DEI to set a baseline understanding of current positioning and establish a roadmap for improvement.

The **COMPLIANT** organization is largely focused on risk mitigation, with a basic understanding of diversity (representation), and does not have a DEI strategy.

"What do we have to do to stay out of trouble?"

The **EMERGENT** organization has incorporated diversity and inclusion inconsistently throughout the organization. DEI strategy exists but is not tied to strategic outcomes.

"What are the most immediate areas to promote diversity and inclusion within the walls of my organization?"

The **EMBRACING** organization has a diverse mix of employees with differences in visible and invisible identities. DEI strategy is linked to business strategy, with preliminary efforts to optimize its diversity and advance equitable outcomes.

"How do we design for the unique needs of our intersectional workforce?"

The **INTEGRATED** organization has begun to embed equitable practices throughout its business with intentional focus. Diversity is represented broadly throughout the organization and in key leadership positions.

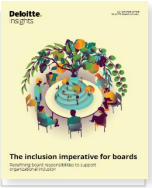
"How can we embed and drive equity in all of our behaviors, systems, policies, and processes?"

The **EQUITABLE** organization leverages diverse backgrounds, capabilities, viewpoints, etc. to drive business results and value, and monitors key indicators to understand and correct for inequitable outcomes. Employees and leaders feel like diversity, leveraged through inclusion, is integral to business success.

"How can we drive value from diversity, equity, and inclusion internally?"

Deloitte's DEI eminence

Deloitte's DEI solutions are backed by research and published thought leadership. Our select publications help organizations understand what DEI means today, how it impacts business outcomes, and what leadership behaviors can help to unleash employee and business potential.



The Inclusion Imperative for Boards

Management teams—their efforts often led by chief diversity, inclusion, or human resources officers—have started to recognize that focusing on diversity without also focusing on inclusion is not a winning strategy. This paper explores the role of the board of directors in building an inclusive enterprise.

Published: Apr 2019 | Read more

The Equity Imperative

Challenge the status quo. Transform long-held beliefs and behaviors. Build a more equitable future, together. Businesses can help lead the way toward racial equity and our perspective can help you drive the change.

Published: Feb 2021 | Read more

Activating Health Equity: A moral imperative calling for business solutions

Disparities in health outcomes should not, and do not have to, be driven by racism and bias. Here's what life sciences and health care organizations can do to advance equity in the pursuit of health and well-being for all.

Published: Apr 2021 | Read more

The purpose premium: Why a purpose-driven strategy is good

An integrated purpose strategy—one that's focused on the differentiated role a company serves in society—can provide organizations with a "purpose premium," driving long-term value and creating competitive advantage.

Published: Apr 2021 | Read more

Government's equity imperative

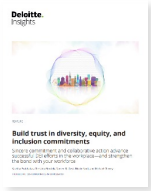
Inequity and bias impacting the use and delivery of federal services is a systemic problem requiring a systemic response. To build an equitable future, government leaders should address inequities across all parts of their organizations and beyond.

Published: Sept 2021 | Read more

Ethical technology and trust

Those companies that develop an ethical technology mindset—demonstrating a commitment to ethical decision-making and promoting a culture that supports it—have an opportunity to earn the trust of their stakeholders.

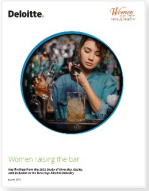
Published: Sept 2021| Read more



Building trust in DEI

Sincere commitment and collaborative action can be instrumental to garnering trust from stakeholders and progressing toward more equitable outcomes.

Published: Jan 2022 | Read more



Women raising the bar

How can companies build more diverse, equitable, and inclusive workplaces for women in the alcohol industry? This study explores the biggest challenges facing the industry today and strategies to help alcohol companies make positive progress toward their DEI goals.

Published: Mar 2022 | Read more

For the latest eminence: Check out our DEI services website, the Deloitte Insights DEI eminence collection, and our DEI perspectives website.

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