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# **Voluntary Gender Equality Reporting in Organisations with 150 to 249 Employees**

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## **Institute for Employment Studies**

The Institute for Employment Studies (IES) is an independent, apolitical, international centre of research and consultancy in human resources (HR) issues. It works closely with employers in all sectors, government departments, agencies, professional bodies and associations. IES is a focus of knowledge and practical experience in employment and training policy, the operation of labour markets, and HR planning and development. IES is a not-for-profit organisation.

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**DISCLAIMER:** The views expressed in this report are those of the authors, not necessarily those of GEO and the Home Office, nor do they represent Government policy.

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# Executive Summary

## Introduction

On 2 December 2010, the Government published 'The Equality Strategy – Building a Fairer Britain' (GEO, 2010). In this strategy the Government sets out a commitment to work with businesses and others to address the main challenges to equality in the workplace by developing a voluntary scheme for gender pay reporting in the private and voluntary sectors, particularly for those with 150 or more employees. Transparency on gender pay and equality should assist employers in identifying issues and actions, and also empower investors and individuals to challenge the status quo within organisations, and to take account of gender equality issues when deciding where to invest and work.

## Aim and objectives of the research

The Government Equalities Office (GEO) commissioned the Institute for Employment Studies (IES) and Ecorys to undertake research to:

- Understand transparency on gender pay gaps and workforce diversity in organisations with between 150 and 249 employees.

To achieve this, the project has focused on:

- Providing equivalent information on organisations with 150 to 249 employees, to the baseline research by IFF Research for the Equality and Human Rights Commission (EHRC) (Adams et al., 2010), which focused on organisations employing 250 or more employees.
- Assessing whether organisations employing 150 to 249 employees collect sufficient data to be able to publish meaningful equality information around pay gaps, workforce diversity and other measures.
- Assessing the prevalence of published equality data across these organisations and the motivations and barriers to publishing and collecting this information.
- Determining the nature and quality of the data that are recorded and how comparable they are with other organisations.
- Understanding what support organisations of this size require in order for them to establish transparency on equalities.

## Method of approach

The research combined a quantitative survey of medium-sized employers<sup>1</sup> (those with 150 to 249 employees for this survey) operating in the private and voluntary sectors and in: manufacturing and construction; distribution, hotels and restaurants; banking, finance and insurance; and other private services. The survey set out to achieve 500 interviews although it secured only 185 interviews over a two-month period. A number of factors are likely to have contributed to the lower response rate: the timing of the survey; the economic climate; survey fatigue; and a perceived lack of time to participate. The survey was supplemented by 17 follow-up, in-depth qualitative interviews.

## Key findings

### Employer openness about pay

In medium-sized organisations a degree of secrecy surrounds the issue of pay. In 40 per cent of these employers, staff were free to talk about their pay but the company provided no information on the subject. Staff were discouraged from talking about pay in 12 per cent of medium-sized organisations, and some stated in the employment contract that staff should not discuss pay with colleagues (5% of employers).

Most medium-sized employers offered additional benefits to staff, such as performance bonuses and pensions, although the distribution of these benefits often differed according to staff group, for example, they are payable only to staff at a certain grade or level.

### Prioritising and tackling workforce diversity and the gender pay gap

The majority of medium-sized employers (67%) reported that workforce diversity was a very high or fairly high business priority and over one-half of all medium-sized employers (58%) also attached a similar priority to ensuring there was no gap between men and women's pay. However, a greater proportion of employers identified reducing any gender pay gap as a priority than had a planned approach for implementation: just over one-third of medium-sized employers that reported that reducing the pay gap was a priority said they had a plan to do so. Almost one-half of all medium-sized businesses taking part in the survey reported that someone within their organisation had responsibility for ensuring 'equal pay between men and women' as part of their job role, and two-thirds of all businesses surveyed provided training in equality and diversity awareness.

<sup>1</sup> The Department for Business Innovation and Skills (BIS) definition of employers by size is as follows: micro enterprises (1–9 persons employed); small enterprises (10–49 persons employed); medium-sized enterprises (50–249 persons employed); small and medium-sized enterprises (SMEs) (1–249 persons employed); large enterprises (250 or more persons employed).

## **Analysis of the gender pay gap and workforce diversity data**

The analysis of any gender pay gap relies on the availability of key personnel and pay data. Nearly all medium-sized employers reported that they held human resources (HR) records electronically, although over one-half had separate systems for HR records and payroll (and around one-third of this group thought that combining the two separate systems would be difficult). In almost one-fifth of medium-sized employers, key data on gender and current salary were not held on employees' individual personnel records, meaning any analysis of gender pay gaps would not be possible using their current systems.

Nearly one-third (32%) of all medium-sized employers that collected diversity data on employees' individual personnel records had undertaken some analysis of the gender pay gap. A further 11 per cent planned to do so in the future.

In addition, ten per cent of all medium-sized employers reported that they were in the process of conducting a formal review of the gender pay gap, using a set formula to compare men and women's pay in equivalent job roles, which is a prerequisite of being able to publish gender pay gap results. Just under one-fifth of medium-sized employers (19%) that were not undertaking a formal review at the time of the survey reported that they had plans to do so in the future.

The main reason offered for not carrying out an equal pay review at the time of the survey was the belief that they already provided equal pay (80% of medium-sized employers that were not undertaking a formal review reported this to be the case).

The key push factor that would encourage medium-sized employers to carry out a formal gender pay gap review was to comply with legislation (23% of those not carrying out a formal review reported this as the key influence). A further 12 per cent of medium-sized employers said they would undertake a formal pay gap review if an employee made a complaint or took action against them.

Although most medium-sized employers had not carried out a formal review of the gender pay gap, a lack of information or advice did not seem to be a particular barrier to doing so: one-half (50%) of them said that they would not require any support and a further 16 per cent could not think of any support that they might need.

Only a small number of medium-sized employers had undertaken an analysis of the gap between men and women on non-pay related measures. One in three medium-sized employers that conducted a staff survey analysed the findings by diversity group, such as gender. This indicates scope to encourage employers to make greater use of the workforce diversity data they collect and collate.



## **Reporting the gender pay gap**

In all, 18 per cent of all medium-sized employers were undertaking a formal gender pay gap review at the time of the survey, or had conducted one in the past (34 respondents). Four per cent of all employers (eight respondents) reported the findings of these formal reviews internally. A similar proportion stated that they reported the results of their formal gender pay gap review externally (seven respondents or 4% of all medium-sized employers overall). The incidence of gender pay gap analysis is likely to be slightly higher as approximately one in ten medium-sized employers also said that they had undertaken some informal analysis of the gender pay gap but had not done so formally.

Organisations that reported on the gender pay gap internally or were open to doing so said that they had nothing to hide, or felt that the company culture was to be fair and transparent. Over one-third of medium-sized employers that had not published gender pay gap review data were open to doing so internally but a smaller proportion were open to reporting externally (21%). The main reason offered for not reporting externally or internally on the gender pay gap was that it was not company policy to discuss pay.

The factors that might influence employers to report gender pay gap analysis and review data externally included a range of push and pull factors with around one-half of all medium-sized employers saying they would consider it if: advice on how to report clearly was available; competitors did the same; they were able to report and provide an explanation of the figures; and/or an employee took action or complained.

Just over one-half of all medium-sized employers that did not think these factors would change their reporting behaviour said they would only report externally if they were required to do so by law. Over one in ten of these employers said nothing would encourage them to report gender pay gap analysis externally.

## **Conclusions**

There remains a lack of understanding among many medium-sized employers that equality was more than equal pay for equal value. It is encouraging that many medium-sized businesses have the systems in place to measure and therefore the potential to analyse the gender pay gap and monitor workforce diversity. A first step to more widespread and greater transparency would be to encourage organisations to use their existing data to analyse workforce diversity and the gender pay gap. There remains some way to go before a lot of medium-sized businesses will report gender pay reviews and gaps voluntarily and it appears that many will not do so until legislation dictates it.

# I Introduction

## 1.1 Background

On 2 December 2010, the Government published 'The Equality Strategy – Building a Fairer Britain' (GEO, 2010). In this strategy the Government sets out a commitment to work with businesses and others to address the main challenges to equality in the workplace by developing a voluntary scheme for gender pay reporting in the private and voluntary sectors, particularly for those with 150 or more employees. Transparency on gender pay and equality benefits should assist employers in identifying issues and actions, and also empower investors and individuals to challenge the status quo within organisations, and to take account of gender equality issues when deciding where to invest and work.

As part of the Equality Strategy, the Government stated it would review annually the number of companies releasing information and the quality of the information under the voluntary approach. This would help to assess its success and determine if 'alternatives are required, including using a mandatory approach through Section 78 of the Equality Act 2010' (GEO, 2010, p 14). The Government stated it would not commence, amend or withdraw the gender pay reporting measures in Section 78 while it is working with organisations on how best to support transparency on a voluntary basis (ibid.).

The gender pay gap (differences between men and women's average pay), despite decades of legislation to enforce equal pay for like work and work rated of equal value, still shows that for full-time employees the pay gap between men and women's median earnings is 10.2 per cent, down from 12.2 per cent in 2009. Calculated at the mean rather than the median, full-time women's hourly pay is 15.5 per cent less than men's, down from 16.4 per cent in 2009 (Office for National Statistics, 2010). The gender pay gap is also shown to be greater for women working part-time, many of whom work in small businesses, with median hourly earnings, excluding overtime, of part-time female employees at 36.2 per cent less than the earnings of full-time male employees, or 34.5 per cent less at the mean (ibid.).

The prevalence of the gender pay gap is broadly the result of vertical and horizontal occupational segregation (where women tend to be concentrated into roles that are lower paid and/or in lower paid sectors such as retailing and care). Some 22 per cent of the gender pay gap is due to the different occupations and industries in which men and women work (GEO, 2010).

Behind this sectoral or occupational segmentation lie numerous factors, which explain why women do not occupy higher paid roles in higher paid sectors, or, when they do, why there is still a gender pay gap (Metcalf and Rolfe, 2009). Some of these issues are internal to the organisation and cover problems of equity in promotion, availability of flexibility in working time or in systems of maternity and paternity pay, and difficulties in finding flexible childcare (GEO, 2010), as well as more subtle issues relating to organisational culture, which may result in women deselecting themselves for higher paid jobs (Cox et al., 2005). Others relate to inherently unequal ways in which women's work is valued across the labour market and the prevalence of the 'market factor' defence of unequal pay (Grimshaw and Rubery, 2007) and gendered psychological evidence showing that women are less likely than men to bargain over pay (Babcock and Laschever, 2003).

The Government Equalities Office (GEO), in partnership with others from government, and the private and voluntary sectors, is developing a voluntary reporting framework to encourage employers to report workforce diversity and equality information. The approach aims to obtain consistency across the quality and quantity of reporting and to achieve comparability between organisations. The framework outlines the measures of gender pay and equality reporting in more detail, offering choice and flexibility and reflecting the different types of employers and the different nature of the challenges that transparency may represent to different sized organisations.

In 2009, IFF Research conducted studies for the GEO and the Equality and Human Rights Commission (EHRC), which set out a detailed baseline on gender pay and equality reporting for private and voluntary sector organisations with 250 employees or more (IFF Research, 2009 and Adams et al., 2010). In line with commitments made in the Equality Strategy, this report extends the established baseline position to organisations with between 150 and 249 employees. This will enable progress on voluntary approaches to equality reporting in organisations to be reviewed regularly for all private sector and voluntary organisations with 150 or more employees.

## **1.2 Research aim and objectives**

The overall aim of the research is to:

- Understand transparency on equalities, specifically gender pay gaps and workforce diversity, in organisations between 150 and 249 employees in size.

To achieve this, the project focuses the research areas on:

- Providing equivalent information on smaller organisations with 150 to 249 employees to the baseline research by IFF Research for the EHRC (Adams et al., 2010), which focused on organisations with 250 or more employees.
- Assessing whether organisations with 150 to 249 employees collect sufficient data to be able to publish meaningful equality information around pay gaps, workforce diversity and other measures.
- Assessing the prevalence of published equality data across these organisations and the motivations and barriers to publishing and collecting this information.
- Determining the nature and quality of the data that are recorded and how comparable they are with other organisations
- Understanding what support organisations of this size require in order for them to establish transparency on equalities.

### 1.3 Overview of the methodology

This section provides an overview of the methodology. Further methodological detail is provided in Annex I.

#### 1.3.1 Quantitative employer survey

The survey aimed to achieve 500 interviews with employers with between 150 and 249 employees. The survey was piloted at the end of March 2011, and the main stage ran from 1 April – 31 May 2011. The response rate was much lower than intended: in total 185 interviews were achieved. The fieldwork period covered a number of Bank Holidays and Easter, which made it challenging to secure employer participation. To try to mitigate these factors, and increase the response rate, a web-based version of the survey was created. A link to the survey, along with some introductory text, was emailed to the sample of employers. This was followed up with telephone calls, and a reminder email. In total 24 employers completed the web-based survey. For future similar surveys it would be valuable to consider the timing of the fieldwork period and perhaps build in time for a letter/email to potential respondents setting out the aims and purpose of the research, to try to increase familiarity and trust in the survey with the aim of increasing the response rate.

#### Profile of survey population

In all, 185 businesses responded to the survey: approximately one-third of these were engaged in manufacturing and construction (30%); one-third in other private services (33%) one-quarter were in the distribution, hotels and restaurants sector; and just over one in ten medium-sized businesses taking part in the survey were in the banking, finance and insurance sector (Table 1.1).

**Table 1.1: Sample achieved in Great Britain**

| Main business activity               | 150—249 employees % |
|--------------------------------------|---------------------|
| Manufacturing and construction       | 30                  |
| Distribution, hotels and restaurants | 25                  |
| Banking, finance and insurance       | 12                  |
| Other private services               | 33                  |
| <b>Base (N)</b>                      | <b>185</b>          |

Source: IES/Ecorys survey of medium-sized businesses, 2011

The achieved sample was checked against the profiles provided by the Dun and Bradstreet data and weightings were applied on a sector basis. The country profile was sufficiently accurate for weighting to be unnecessary, and given the relatively narrow size of employers in the survey it was agreed not to weight by size. Further detail of the weighting calculation is included in Annex I.

The majority (85%) of all business taking part in the survey described their organisation as seeking to make a profit whilst 14 per cent said that they operated in the charity/voluntary sector.

### 1.3.2 Qualitative interviews with employers

To secure participants for the qualitative interviews the research team added a question to the quantitative telephone survey asking if employers would be prepared to be contacted to participate in a follow-up, in-depth telephone interview on voluntary reporting on gender equality. The Institute for Employment Studies (IES) followed up these leads and formed a sample aligned into three groups, stratified as follows:

- Group 1 – Organisations that do not analyse data to explore the gap between men and women’s average pay.
- Group 2 – Organisations that analyse data but do not publish it.
- Group 3 – Organisations that analyse and publish equality information.

Details of the size of the sample for each group and the level of response are given below (Table 1.2).

**Table 1.2: Qualitative sample structure**

|              | No. of leads from survey | No. of refusals | No. of unreachable contacts | No. of interviews booked but interviewee unavailable | No. of interviews conducted |
|--------------|--------------------------|-----------------|-----------------------------|--|-----------------------------|
| Group 1      | 41                       | 9               | 18                          | 3  | 11                          |
| Group 2      | 22                       | 3               | 12                          | 1  | 6                           |
| Group 3      | 3                        | 2               | 1                           | 0  | 0                           |
| <b>Total</b> | <b>66</b>                | <b>14</b>       | <b>31</b>                   | <b>4</b>   | <b>17</b>                   |

Source: IES, 2011

Despite a number of attempts, it was not possible to secure an in-depth interview with any organisations that analysed and publish equality information. A different discussion guide was produced for each group in the sample and these are provided in Annex 2. The telephone interviews were mostly conducted with the organisation’s human resources (HR) manager and each interview lasted between 15 and 30 minutes.

### **1.3.3 Comparing findings with the large employer survey**

In 2009, a telephone survey was undertaken with 900 employers with 250 or more employees (Adams et al., 2010). The same questionnaire was slightly adapted and used for this study to enable read-across between the findings. When comparing the findings of the survey with organisations with 250 or more employees (large employers) to the findings for organisations with between 150 and 249 employees (medium-sized employers), some caution should be taken because the surveys took place during different time periods. There may also be differences between the two populations other than size that could affect the findings, for example, the proportion of organisations operating in the voluntary sector. In addition, the surveys had different weighting approaches, which may also affect the comparability.

While this report presents the findings from both the surveys together throughout the report, in part because of a lack of published methodological detail for the previous survey, the research team has not undertaken any analysis to assess whether seeming differences between the two surveys are (statistically) significant. The comparisons made in this report should therefore be treated with some caution.

Together the two surveys provide data for all employers with more than 150 employees. In the population there were more businesses with between 150 and 249 employees (8,563 organisations) than there were in the population of businesses with 250 or more employees (6,875 organisations; Adams et al., 2010, p 3). When estimating the likely range of responses for all businesses with 150 or more employees the results are likely to be between the two survey results, but more similar to those for businesses with 150 to 249 employees. Without further information about the methodological approach of the large employer survey it was not possible to provide robust estimates for all employers with more than 150 employees. The future combined survey will provide a more robust benchmark for voluntary equality reporting in businesses for this group as a whole.

### **1.3.4 Reporting conventions**

The level of confidence that may be attached to the achieved sample of 185, at the 95 per cent level, is +/-7.2 per cent. Thus, if a response of 50 per cent is given by the sample, it would be 95 per cent certain that the figure for the whole population would be in the range 42.8 per cent to 57.2 per cent.

Unless noted, all the findings in this report are based on the weighted data. Unweighted bases, which indicate the number of responses to the question, are displayed where appropriate to indicate the robustness of the results. The approach to reporting weighted figures in this report is slightly different to that used in the large employer (250 or more employees survey by Adams et al. (2010). Given the larger population, the lower than anticipated response rate for the medium-sized employer survey, and subsequent impact on the confidence intervals (+/- 7.2%), only unweighted bases are given in the tables throughout the report, and not the grossed up figures, so as not to create undue confidence in the accuracy of the numbers presented.

References to 'size' refer to the number of employees an employer has across all of its sites in Great Britain. The terms used to describe employers in this report are: 'medium-sized employers', which refers here to employers with between 150 and 249 employees' and 'large employers', which refers to employers with 250 or more employees.<sup>2</sup>

Unless otherwise stated, percentages in data tables are column percentages. These indicate the proportion of the column total, rather than the proportion of the total in the row.

## **1.4 Overview of respondents**

### **1.4.1 Structure of the HR function**

More than one-quarter (27%) of all businesses taking part in the survey were owned by companies outside of the UK and 37 per cent of all medium-sized businesses had a corporate headquarters (HQ) located at a separate site. In employers with a separate HQ, the human resources (HR) function tended to be centralised, with over one-half of all businesses (54%) with a separate HQ stating this was the case (N=69).

### **1.4.2 Workforce profile**

Looking at the gender distribution of the workforce, Table I.3 illustrates that women make up ten per cent or less of the workforce in approximately one in ten employers, and more than one-half of the workforce in just under one-third of medium-sized organisations. Even though nearly all of these employers employ people at a management or senior level, Table I.3 also shows that in seven per cent of employers there are no women in managerial or senior posts.

Women take up more than one-half of all managerial/senior positions in only 11 per cent of medium-sized employers.

<sup>2</sup> The Department for Business Innovation and Skills (BIS) definition of employers by size is as follows: micro enterprises (1–9 persons employed); small enterprises (10–49 persons employed); medium-sized enterprises (50–249 persons employed); small and medium-sized enterprises (SMEs) (1–249 persons employed); large enterprises (250 or more persons employed).

**Table I.3: Proportion of the workforce who are women in medium-sized businesses**

| <b>% of workforce who are women</b> | <b>% all posts</b> | <b>% managerial/senior posts</b> |
|-------------------------------------|--------------------|----------------------------------|
| None                                | -                  | 7                                |
| 10% or less                         | 9                  | 28                               |
| 11—25%                              | 20                 | 17                               |
| 26—50%                              | 36                 | 29                               |
| 51—75%                              | 24                 | 8                                |
| 76—90%                              | 5                  | 3                                |
| 91—99%                              | 1                  | -                                |
| 100%                                | 1                  | -                                |
| Don't know                          | 5                  | 7                                |
| <b>Base (N)</b>                     | <b>185</b>         | <b>183</b>                       |

Source: IES/Ecorys survey of medium-sized businesses, 2011

### **1.4.3 Employee compensation**

Over one-half of all medium-sized businesses surveyed (59%) thought that their total salary offer to staff was 'around average' with a further 25 per cent viewing their salary offer as 'a bit above average' and 3 per cent believing their offer was 'significantly above average'. Fewer than one in ten medium-sized businesses believed that their salary offer was below average. Most businesses offered additional benefits to staff. The most common was a pension, offered by 79 per cent of medium-sized employers. Full details of the additional benefits offered to staff are shown in Table I.4.



**Table 1.4: Proportion of businesses offering additional benefits to staff**

|   | <b>N</b> | <b>% of cases</b> |
|---|----------|-------------------|
| Pension   | 146      | 79                |
| Bonuses based on the overall performance of the company | 103      | 56                |
| Company cars  | 96       | 52                |
| Bonuses based on individual performance                 | 79       | 43                |
| Bonuses based on team performance                       | 46       | 25                |
| Other   | 27       | 15                |
| Share options   | 17       | 9                 |
| Private health cover                                    | 14       | 8                 |
| Life Insurance  | 10       | 6                 |
| None  | 8        | 4                 |
| Don't know  | 4        | 2                 |
| <b>Base (N)</b>   |          | <b>185</b>        |

Multiple response variable.

Source: IES/Ecorys survey of medium-sized businesses, 2011

There are marked differences in the distribution of additional benefits according to staff group (Table 1.5). Bonuses based on overall company performance are distributed to all staff in 49 per cent of businesses making these additional payments. However, 29 per cent of businesses making these payments do so only to staff above a certain grade/level and a further 10 per cent make them only to staff who have been with them for a certain number of years.

**Table 1.5: Distribution of additional benefits**

| Staff group  | % of employers offering specific benefits, by staff group |                                 |                           |            |             |
|--|---|---------------------------------|---------------------------|------------|-------------|
|  | Bonus on overall performance                              | Bonus on individual performance | Bonus on team performance | Pension    | Company car |
| All staff with the company for a certain number of years | 10  | 4                               | 3                         | 13         | 2           |
| All staff above a certain grade/level                    | 29  | 37                              | 26                        | 15         | 60          |
| All full-time staff (not part-time staff)                | 2   | -                               | 8                         | 3          | -           |
| Sales teams  | 10  | 29                              | 28                        | -          | 41          |
| All staff  | 49  | 34                              | 35                        | 61         | 2           |
| Other  | 8   | 13                              | 13                        | 2          | 8           |
| Don't know   | -   | -                               | -                         | 7          | 1           |
| <b>Base (N)</b>  | <b>103</b>  | <b>77</b>                       | <b>46</b>                 | <b>146</b> | <b>96</b>   |

Source: IES/Ecorys survey of medium-sized businesses, 2011

All medium-sized employers were asked whether, when reviewing salaries, they used an individual performance-related element. In all, 42 per cent reported that there was an individual performance-related element to salary reviews for all employees; 21 per cent said there was an individual performance-related element for employees within a particular grade/role; and 29 per cent reported that there was no individual performance-related element to their salary reviews for any employees.

Focusing on pay bands, 46 per cent of medium-sized businesses reported that there were set pay bands for each job role into which an employee's salary must fall. Around one-sixth (16%) said this varied by job role whilst 36 per cent of medium-sized businesses said there were no set pay bands. The most common factors on which pay bands were based (for those operating such a system) were: a review of job titles (37% or N=36); a factor-based analytical job evaluation system (31% or N=30); a comparison of job characteristics (28% of businesses used this method or N=27).

#### 1.4.4 Determining pay

Starting pay in medium-sized businesses was determined in different ways, the most common being to start all new recruits on a set rate for the grade or role (43% of businesses). In 30 per cent of all businesses, however, starting pay was determined by the recruiting manager and for a further 20 per cent, pay was determined by a combination of the two methods.

Pay increases for promotions in medium-sized businesses were also determined differentially. More than one-half (54%) reported that promotion increases were set and agreed on a case-by-case basis compared with 27 per cent that stated that they had a set rate increase for each grade/role. Once again, in 12 per cent of businesses a combination of the two methods for determining promotion-related pay increases existed.

#### 1.4.5 Employer openness about pay

As with the survey of large employers, there is little emphasis on openness about pay within medium-sized employers (Table 1.6).

**Table 1.6: Employer openness about pay**

| Employer approach to pay  | % of medium-sized businesses | % of large businesses |
|---|------------------------------|-----------------------|
| Staff are free to talk about it if they wish but there is no information from the company on the matter | 40                           | 31                    |
| Staff know the pay band into which their role falls   | 20                           | 35                    |
| Staff are formally made aware of how much their colleagues in the same role are paid                    | 12                           | 4                     |
| Staff are discouraged from talking about it but there is no information from the company on the matter  | 12                           | 18                    |
| It differs between roles  | 7                            | 8                     |
| Staff have it in their contract that they cannot discuss pay with colleagues                            | 5                            | 2                     |
| Don't know  | 5                            | 1                     |
| <b>Base (N)</b>   | <b>185</b>                   | <b>900</b>            |

Source: IES/Ecorys survey of medium-sized businesses, 2011; Adams et al., 2010, Figure 2.4

The table shows that in 40 per cent of companies staff were free to talk about pay if they wished but the company did not provide information on the matter. In 12 per cent of companies staff were discouraged from talking about pay (and the companies did not provide information on the matter) whilst 5 per cent of businesses reported that staff were told in their contracts that they cannot discuss pay with colleagues. Just 12 per cent of medium-sized businesses stated that staff were made formally aware of how much colleagues in the same role were paid.

#### **1.4.6 Responsibility for ensuring equal pay between men and women**

Almost one-half of all medium-sized businesses taking part in the survey (46%) reported that someone within their organisation had responsibility for ensuring 'equal pay between men and women' as a defined part of their role (compared with 39% of businesses taking part in the survey of large employers in 2009 – see Adams et al., 2010, p 10).

#### **1.4.7 Equality and diversity awareness training**

Approximately two-thirds of all medium-sized businesses provided training in equality and diversity awareness (one-third did not). The types of staff most likely to attend this training were: senior managers (in 94% of cases where this training was provided); staff involved in recruitment (88%); line managers (84%); and staff involved in setting rates of pay (80%).

### **1.5 Report structure**

The remainder of this report is structured as follows:

- Chapter 2 provides the survey findings relating to employer context and cultures, the priority that reducing the gender pay gap receives, and any plans for reducing it.
- Chapter 3 details the survey findings about the extent to which organisations collect and have analysed the data that they hold on the pay of men and women.
- Chapter 4 presents the survey findings about the extent of reporting of gender pay gap data.
- Chapter 5 presents the findings from the qualitative employer interviews.
- Chapter 6 summarises the findings and the implications for the Transparency Framework..

## 2 Employer Contexts and Culture

This chapter explores the extent to which organisations are operating in a context and have a culture that supports gender pay gap analysis and reporting. It considers the priority that reducing the gender pay gap receives in the organisation and any plans organisations have for reducing it and promoting workforce diversity.

### 2.1 Prioritising and tackling workforce diversity and the gender pay gap

All medium-sized employers were asked whether they had an Equal Opportunities and/or Diversity Statement. The majority (79%) said they had both, 15 per cent said they only had an Equal Opportunities Statement, and 1 per cent reported having only a Diversity Statement. There are still 5 per cent that said they have neither.

All medium-sized employers were also asked about the extent to which workforce diversity was a business priority. The majority (67%) said that workforce diversity was either a very high or a fairly high business priority (Table 2.1).

**Table 2.1: Extent to which workforce diversity is a business priority**

|   | %          |
|---|------------|
| Very high priority                          | 42         |
| Fairly high priority                        | 25         |
| Fairly low priority                         | 10         |
| Very low priority                           | 4          |
| Not a priority at all                       | 12         |
| Don't know                                  | 6          |
| <b>Base: All medium-sized organisations</b> | <b>185</b> |

Source: IES/Ecorys survey of medium-sized businesses, 2011

A similar proportion of medium-sized employers also attached a high or fairly high level of business priority to ensuring that there was no gap between men and women's pay (58%) (Table 2.2). This compared with 50 per cent of large employers attaching a very/fairly high level of priority.

**Table 2.2: Level of priority attached to ensuring that there is no gap between men and women’s pay**

|                                | <b>% of medium-sized employers</b> | <b>% of large employers</b> |
|--------------------------------|------------------------------------|-----------------------------|
| Very high priority             | 41                                 | 20                          |
| Fairly high priority           | 17                                 | 30                          |
| Fairly low priority            | 10                                 | 16                          |
| Very low priority              | 5                                  | 6                           |
| Not a priority at all          | 18                                 | 24                          |
| Don’t know                     | 9                                  | 4                           |
| <b>Base: All organisations</b> | <b>182</b>                         | <b>900</b>                  |

Source: Adams et al., 2010, Table 2.1; IES/Ecorys survey of medium-sized businesses, 2011

Just three per cent of medium-sized employers had been presented with an Equal Pay questionnaire by an employee and none of the surveyed organisations had had an equal pay claim filed against them. While this low level is not unexpected, such events are likely to prompt some employers to take action and report gender pay review analysis (see Table 4.4), but the infrequency with which these events occur means that they are likely to have a minimal impact on employer behaviour overall.

## **2.2 Plans for reducing the gender pay gap and increasing workforce diversity**

Those medium-sized employers that said ensuring diversity in their workforce was either a very high or a fairly high priority were asked whether they had a planned approach for increasing workforce diversity. Almost one-third (32%) currently had a planned approach to take forward this business priority, and 24 per cent were informally looking into it (Table 2.3). The majority of medium-sized employers with a planned approach for increasing diversity had set this out to cover the whole workforce (85%) rather than targeting specific job roles or departments.

**Table 2.3: Whether organisations where workforce diversity is a high or a fairly high priority have a planned approach for increasing workforce diversity**

|   | %          |
|---|------------|
| Yes   | 32         |
| No, not a planned approach but are informally looking into it | 24         |
| No, not at all  | 40         |
| Don't know  | 5          |
| <b>Base (N)</b>   | <b>122</b> |

Source: IES/Ecorys survey of medium-sized businesses, 2011

Medium-sized employers that indicated reducing the gap between men and women's pay was either a high or a fairly high business priority were asked whether they had a planned approach to support this priority (Table 2.4); just over one-third (35%) did. The majority of employers with a planned approach for reducing the gender pay gap had set this out to cover the whole workforce (62%) rather than targeting specific job roles (22%) or departments (9%).

**Table 2.4: Whether organisations where reducing the gender pay gap is a high or a fairly high priority have a planned approach for reducing it**

|   | %          |
|---|------------|
| Yes   | 35         |
| No, not a planned approach but are informally looking into it | 25         |
| No, not at all  | 33         |
| Don't know  | 7          |
| <b>Base (N)</b>   | <b>106</b> |

Source: IES/Ecorys survey of medium-sized businesses, 2011

A greater proportion of employers identified reducing any gender pay gap as a priority, than had a planned approach for implementation. This could indicate a gap between attitude and actions for employers that say that increasing workforce diversity and reducing any gender pay gap is a priority.

# 3 Analysis of Gender Pay Gap and Workforce Diversity Data

This chapter examines the extent to which medium-sized employers collect and have analysed the data that they hold on the pay of men and women to explore any differences. The findings include whether organisations undertake staff surveys and analyse the findings to examine differences between diversity groups, whether they conduct formal or informal analysis of gender pay gaps and any support needs they have to help them conduct formal gender pay gap reviews. First this report explores the structure and alignment of payroll and human resources (HR) systems and then looks at data collection, to assess the extent to which these may facilitate or cause barriers to conducting gender pay gap analysis.

## 3.1 Structuring and alignment of payroll and HR systems

The ease of analysing gender pay gap data can be affected by HR and payroll systems. To ease the process employers would ideally have their HR and payroll data on a combined electronic system. Similar to large employers (with 250 or more employees), nearly all medium-sized employers with between 150 and 249 employees kept their HR records electronically (Table 3.1).

**Table 3.1: HR and payroll structure, by size**

| Number of employees | Employers with separate systems % | Employers with a combined system % | Employers with a manual system % | Employers that don't know % | UWtd base |
|---------------------|-----------------------------------|------------------------------------|----------------------------------|-----------------------------|-----------|
| 150—249             | 55                                | 39                                 | 3                                | 4                           | 185       |
| 250—499             | 60                                | 39                                 | -                                | 1                           | 364       |
| 500—999             | 56                                | 43                                 | -                                | 1                           | 238       |
| 1,000+              | 45                                | 52                                 | -                                | 3                           | 298       |
| All (250+)          | 55                                | 43                                 | -                                | 1                           | 900       |

Note: Row percentages

Source: Adams et al., 2010, Table 2.8; IES/Ecorys survey of medium-sized businesses, 2011

Those employers with separate or manual HR and payroll systems were asked how easy it is, or would be, for them to combine the systems. More than one-half (57%) said that it would be very or fairly easy for them to combine the two; while 32 per cent said that it would be fairly or very difficult (12% did not know).

Of all medium-sized employers nearly one in five (17%) said they had separate or manual HR systems, which meant that it would be difficult, but not impossible, for them to combine HR and pay data. This does, however, present a barrier to easily analysing their gender pay data.



### 3.2 Data collection

Regardless of whether their HR system was separate or combined with payroll data, or electronic or manual, all medium-sized employers were asked which pieces of diversity data were recorded on each employee's individual personnel/HR record. Some pieces of diversity data were more likely to be collected than others. Age/date of birth (89%), working hours (87%), contract status (86%), gender (81%) and current salary (81%) were collected by more than four out of five employers. Diversity characteristics such as religious beliefs (19%), gender reassignment (17%), sexual orientation (15%) were least likely to be collected (Table 3.2). Most employers (91%) collected some kind of diversity data on their employee's individual personnel/HR record; 8 per cent reported that they didn't know whether they did or not. Clearly gender pay analysis will be impossible for those employers that do not hold gender or current salary information on HR records.

**Table 3.2: Information kept on employee's individual personnel/HR record**

|  | <b>Base (N)</b> | <b>%</b> |
|--|-----------------|----------|
| Age/date of birth                          | 164             | 89       |
| Working hours                              | 162             | 87       |
| Contract status (temporary or permanent)   | 159             | 86       |
| Gender                                     | 150             | 81       |
| Current salary                             | 149             | 81       |
| Previous salary/details of pay rises       | 142             | 77       |
| Periods of maternity leave                 | 141             | 76       |
| Periods of paternity leave                 | 134             | 72       |
| Marital status                             | 116             | 63       |
| Periods of adoption leave                  | 109             | 59       |
| Ethnicity                                  | 100             | 54       |
| Whether or not they have a disability      | 96              | 52       |
| Religious beliefs                          | 36              | 19       |
| Whether a gender reassignment has occurred | 32              | 17       |
| Sexual orientation                         | 27              | 15       |
| Don't know                                 | 15              | 8        |
| <b>Base: all organisations</b>             | <b>185</b>      |          |

Note: Row percentages and multiple response variable.

Source: IES/Ecorys survey of medium-sized businesses, 2011

Those medium-sized employers that held information on employee's rates of pay on personnel/HR records were asked further details about where data on employee's rates of pay are kept. The majority (75%) kept these data on both the HR record and payroll, and only 14 per cent of employers held rates of pay data solely in payroll (N=149).

In addition to data collected on employee's personnel/HR records, 23 per cent of medium-sized employers collected information on the proportion of mothers returning to work after taking maternity leave.

### **3.2.1 Staff survey**

Employers with between 150 and 249 employees were asked whether they conducted a staff survey, of which one-half (51%/N=94) said they did. The employers that conducted a staff survey were asked whether they included questions about employee's satisfaction with pay (77% said yes); satisfaction with opportunities to work flexibly (61% said yes); perceptions of fair treatment at work (81% said yes); experience of discrimination and experience of harassment (50% and 42% respectively said yes).

## **3.3 Analysis of workforce diversity data**

Workforce diversity was reported by most medium-sized businesses to be a very high or fairly high business priority (see Section 2.1) and one-third of these employers had a planned approach for taking this forward (see Section 2.2). In addition to this most medium-sized organisations collected diversity data about their workforce (see Section 3.2). This indicates that many employers have the necessary data and willingness to monitor and try to increase workforce diversity. However, relatively few employers reported that they analyse these data to look at differences in non-pay measures by gender.

Employers that collected diversity data (N=169) were asked whether their organisation ever analysed data to explore the gap between men and women on a variety of pay-related characteristics. They were also asked whether they looked at a gender gap by any other employee characteristic for which the organisation held data. Only six per cent of these employers reported undertaking this type of analysis. This included analysing shift allowances and other additional payments, analysing the age profile of the workforce, looking at access to training by diversity characteristics and the proportion of employees in senior roles by diversity groups.

Employers that carried out a staff survey were asked whether they analysed the results by diversity groups. Nearly one in three employers that conducted a staff survey (28%) analysed the findings by diversity groups (Table 3.3:). Comparing this analysis to the types of diversity data held on the HR record, similar proportions of medium-sized employers analysed their staff survey by diversity groups and held data about the different strands of diversity, such as gender, ethnicity, and disability. Although these two sources of data are separate this could suggest that employers analysing their staff survey by workforce diversity groups do so across a range of diversity measures.

**Table 3.3: Proportion of employers with a staff survey analysing results by diversity groups**

|               | Frequency | %  |
|---------------|-----------|----|
| Yes           | 27        | 28 |
| No            | 60        | 64 |
| Don't know    | 7         | 8  |
| <b>Base N</b> | <b>94</b> |    |

Source: IES/Ecorys survey of medium-sized businesses, 2011

### 3.4 Analyses of pay

This section explores the extent to which medium-sized employers analyse pay data. Using the same approach as that used in the large employer survey (Adams et al., 2010), the survey looked at two ways of analysing pay data: formal and informal. Formal analysis uses a set formula to compare the difference between men and women's pay in equivalent job roles, the outcome of which is a figure or set of figures showing the percentage or numeric difference. Informal analysis is typically less rigorous, and may simply comprise a member of the HR team looking at pay data, or using basic analysis to compare men and women's pay. Informal analysis may not result in an actual figure of the difference; it is most likely to be a quick check of whether there are any obvious anomalies.

Employers that collected diversity data on their employee's individual personnel/HR record (N=169) were asked whether they ever analysed these data to explore the gap between men and women's average pay. Nearly one-third (32%) of medium-sized organisations had conducted some analysis of the gender pay gap (43% of large employers had done any analysis), and a further 11 per cent of medium-sized employers had definite plans to do so in future (compared with 14% of large employers) (Table 3.4)

**Table 3.4: Proportion of employers collecting diversity data that analyse the gender pay gap**

|  | %          |
|--|------------|
| Yes                                      | 32         |
| No, but have definite plans to in future | 11         |
| No, have no definite plans at present    | 49         |
| Don't know                               | 8          |
| <b>Base (N)</b>                          | <b>169</b> |

Source: IES/Ecorys survey of medium-sized businesses, 2011

The incidence of gender pay gap analysis among medium-sized organisations is lower than for large organisations, a trend also found within the large employer survey (Table 3.5). Among employers with 250 or more employees there were variations in the incidence of gender pay gap analysis by size. Organisations employing fewer employees in this group (250 to 999 employees) were less likely to have done or to be undertaking a gender pay gap analysis and more likely not to have done this analysis or have plans to do so than employers with 1,000 or more employees.

**Table 3.5: Incidence of any type of gender pay gap analysis**

|   | <b>% all employers 250+ employees</b> | <b>% 250—499 employees</b> | <b>% 500—999 employees</b> | <b>% 1,000+ employees</b> |
|---|---------------------------------------|----------------------------|----------------------------|---------------------------|
| Currently doing or have done gender pay gap analysis (formal or informal) | 43                                    | 40                         | 41                         | 52                        |
| Have plans to do gender pay gap analysis, never have previously           | 14                                    | 15                         | 15                         | 12                        |
| Have never done and have no plans to do gender pay gap analysis           | 33                                    | 38                         | 33                         | 24                        |
| Don't know  | 10                                    | 8                          | 11                         | 13                        |
| <b>Base: All organisations</b>  | <b>900</b>                            | <b>364</b>                 | <b>238</b>                 | <b>298</b>                |

Source: Adams et al., 2010, Table 3.2

### **3.4.1 Informal gender pay gap analysis**

All medium-sized organisations that collected diversity data on their employee's individual personnel/HR record were asked whether they ever analysed the data to explore the gap between men and women's pay by various characteristics, such as starting salaries upon recruitment and new salaries on promotion to a higher grade. Nearly one-quarter (23%) said they conducted analysis of the gender pay gap for starting salaries upon recruitment (Table 3.6), and 30 per cent of employers undertook one or more type of analysis.

**Table 3.6: Proportion of employers collecting diversity data that explore the gender pay gap, by various characteristics**

| Characteristics by which gender pay gap analysis undertaken | %<br>Yes | %<br>No | %<br>Don't know | %<br>Base (N) |
|---|----------|---------|-----------------|---------------|
| Starting salaries upon recruitment                          | 23       | 63      | 15              | 169           |
| New salaries on promotion to a higher grade                 | 22       | 64      | 14              | 169           |
| Performance-related pay increases                           | 16       | 70      | 14              | 169           |

Note: Row percentages and only asked of those employers collecting diversity data.

Source: IES/Ecorys survey of medium-sized businesses, 2011

### 3.4.2 Formal gender pay gap analysis

All employers were asked whether they were currently in the process of conducting a formal review to examine the gap between men's and women's pay or had done so in the past. This is an important question as undertaking some kind of formal analysis is a prerequisite for being able to publish gender pay gap results. In all, 10 per cent of medium-sized employers were in the process of conducting a formal review at the time of the survey (compared with 12 per cent of large employers), and 12 per cent of medium-sized employers had conducted a formal review in the past (compared with 23% of large employers) (Table 3.7). The proportions for medium-sized organisations are not mutually exclusive, as three per cent of all respondents were conducting a formal review at the time of the survey and had also done so in the past.

Employers that were not undertaking a formal review of the gender pay gap at the time of the survey were asked whether their organisation had plans to do so in the future. One in five (19%) said that they planned to conduct a formal gender pay gap review in the future (Table 3.7). This compares with 28 per cent of large employers.

**Table 3.7: Proportion of employers currently or previously conducting a formal review of the gender pay gap or that plan to do so in future**

|                 | Medium-sized organisations that are currently in the process of conducting a formal review % | Medium-sized organisations that have ever conducted a formal review % | Medium-sized organisations that plan to conduct a formal review in the future % |
|-----------------|--|---|---|
| Yes             | 10   | 12  | 19  |
| No              | 83   | 79  | 68  |
| Don't know      | 7  | 9   | 13  |
| <b>Base (N)</b> | <b>185</b>   | <b>185</b>  | <b>167</b>  |

Source: IES/Ecorys survey of medium-sized businesses, 2011

### 3.5 Reasons for not undertaking formal gender pay gap reviews

Employers that were not conducting an equal pay review at the time of the survey and employers with no plans to do such analysis were asked about their reasons for not examining any gender pay gap in their organisation. Employers were able to give more than one answer (Table 3.8). The most common reason, given by 80 per cent of medium-sized employers, was that the organisation considered that they already provided equal pay. This was also the reason cited by most large employers that were not undertaking or had not undertaken a gender pay review.<sup>4</sup> Large employers were more likely to cite their analytical job evaluation system as a reason for not undertaking formal gender pay gap reviews (29%) than medium-sized employers (6%).

<sup>4</sup> Adams et al. (2010), Figure 3.3.

**Table 3.8: Reasons for not undertaking formal gender pay gap review**

|   | %          |
|---|------------|
| You consider you already provide equal pay                | 80         |
| You do not have time to do so                             | 7          |
| You have an analytical job evaluation system              | 6          |
| You do not have the financial or other resources to do so | 6          |
| You have concerns about what you would find               | 4          |
| Other   | 9          |
| <b>Base (N)</b>   | <b>131</b> |

Multiple response variable.

Question only asked of those employers not conducting an equal pay review at the time of the survey and with no plans to do so.

Source: IES/Ecorys survey of medium-sized businesses, 2011

### 3.6 Factors that would encourage formal gender pay gap reviews

Employers that were not conducting an equal pay review at the time of the survey and those with no plans to do so were asked what might encourage them to undertake such analysis. They were asked to list the factors that would be any influence, and if they gave more than one were then asked which of those would be the main influence (Table 3.9). Just over one-third of medium-sized employers (37%) said that the question was not applicable to them as they already had equal pay in their organisation. The two main motivators were reported to be that they would have to do so to comply with legislation (23%) or as a result of one or more employees making a complaint or taking action (12%). Both of these influences could be seen as ‘push’ factors, being an influence that required the employer to take action. Possible ‘pull’ factors were weak: influences such as it being good business sense, or wanting to be seen as a good practice employer were cited infrequently as the main factor that would encourage the organisation to undertake a gender pay gap review (1% and 5% respectively). The relatively large influence of ‘push’ and weak influence of ‘pull’ factors was also found in the large employer survey (Adams et al., 2010, Figure 3.4).

**Table 3.9: Factors that would encourage formal gender pay gap reviews**

|  | Employers reporting factor is an influence % | Employers reporting factor is main influence % |
|--|--|--|
| Not applicable — we already have equal pay                                     | 39   | 37   |
| You would have to do so in order to comply with legislation                    | 27   | 23   |
| As a result of one or more employees making a complaint or taking action       | 18   | 12   |
| Don't know   | 13   | 11   |
| For other reasons  | 6  | 6  |
| You want to be a good practice employer  | 14   | 5  |
| As a result of government policy or publicity                                  | 9  | 2  |
| As a result of equal pay cases being raised in your organisation or sector     | 7  | 2  |
| As a result of leadership from employer bodies                                 | 4  | 1  |
| You see it as good business sense  | 6  | 1  |
| You were responding to a request from trade unions                             | 4  | 0  |
| As a result of Equality and Human Rights Commission (EHRC) policy or publicity | 5  | 0  |
| <b>Base (N)</b>  | <b>131</b>                                   | <b>131</b>                                     |

Source: IES/Ecorys survey of medium-sized businesses, 2011

### 3.7 Support that would encourage formal gender pay gap reviews

Employers that were not currently undertaking a formal gender pay gap review and that had not done so in the past were asked on an unprompted basis what support they might need to encourage them to measure any gap between men and women's pay. Organisations were able to cite more than one source of support. Overall, 50 per cent of employers reported that they would not require any support and a further 16 per cent were unable to think of any support that they might benefit from (Table 3.10).



**Table 3.10: Support that would encourage formal gender pay gap reviews**

|   | %          |
|---|------------|
| A website with advice on how to measure the gap | 15         |
| Help-line advice                                | 8          |
| Having extra internal resources                 | 7          |
| Hard copy written materials to aid you          | 4          |
| External consultancy advice                     | 3          |
| Would not need any support                      | 50         |
| Other   | 5          |
| Don't know                                      | 16         |
| <b>Base (N)</b>                                 | <b>131</b> |

Multiple response variable.

Only asked of organisations that have not/are not conducting a formal gender pay gap review.

Source: IES/Ecorys survey of medium-sized businesses, 2011

Employers that had no involvement in measuring the gender pay gap and that noted some form of support that would encourage them to undertake this type of analysis were asked where they might go for help to measure the difference between men and women's pay (N=46). The sources of support that were most cited were the Advisory, Conciliation and Arbitration Service (ACAS), and the Chartered Institute of Personnel and Development (CIPD), cited by 49 per cent and 27 per cent of employers respectively. These organisations were also the most likely sources of support among large employers (Adams et al., 2010, p 39).

# 4 Reporting of Gender Pay Gap Data

This chapter looks at the extent of reporting of gender pay gap data among medium-sized employers. It makes a distinction between the reporting of data internally within the organisation and reporting externally, outside of the organisation.

## 4.1 Reporting of formal gender pay gap reviews

At the time of the survey 18 per cent of medium-sized organisations were conducting a formal gender pay gap review, or had conducted one in the past (N=34). They were asked whether they had reported the findings of the review internally, for example, on the company intranet or in the staff handbook. Most said they did not report the review findings to staff. In total four per cent of all medium-sized employers reported gender pay gaps internally (N=8). This is a similar proportion to that of employers with 250 or more employees (Adams et al., 2010, Table 4.1).

The employers conducting a formal gender pay gap review at the time of the survey, or that had conducted one in the past, were also asked whether they had reported the findings of the review externally, for example, on the company website or in an annual report. Once again, four per cent of all medium-sized employers reported gender pay gaps externally (N=7). Given the margins of error in this survey the findings are broadly similar to the total for large employers (ibid., Table 4.1).

There were a proportion of employers that have undertaken some informal analysis of the gender pay gap, but have not done so formally (approximately one in ten medium-sized employers). There could therefore be some additional employers that could report on informal analysis of gender pay gaps that were not asked about their reporting activities in this survey.

Among all employers that conducted analysis of pay data (whether formal or informal), the findings were most likely to be shared with the board or senior managers (Table 4.1). This reflected a similar pattern among large employers (ibid., Table 4.1).

**Table 4.1: Type of staff gender pay analysis results are shared with**

|   | <b>N</b> | <b>% of cases</b> |
|---|----------|-------------------|
| At board level                          | 50       | 74                |
| To senior managers                      | 35       | 53                |
| To line managers                        | 23       | 34                |
| To all salaried staff                   | 9        | 13                |
| Not communicated outside HR team        | 6        | 9                 |
| To contractors and agency workers/temps | 3        | 5                 |
| Don't know                              | 3        | 5                 |
| Other                                   | 1        | 2                 |
| <b>Base (N)</b>                         |          | <b>67</b>         |

Multiple response variable.

Source: IES/Ecorys survey of medium-sized businesses, 2011

Organisations that had reported the findings of gender pay analysis or that were open to the idea of reporting tended to be positive about reporting their findings internally as they felt they had nothing to hide, or felt that the company culture was to be fair and transparent.

Due to the small number of organisations reporting or publishing an analysis of differences between men and women's pay internally, it was not possible to report on the proportions publishing or reporting different types of information.

#### **4.2 Non-reporting of data**

Employers that had not published gender pay gap review data internally and/or externally were asked about their openness to do so (Table 4.2). More than one-third (38%) of medium-sized employers would be open to reporting gender pay gap analysis **internally**. A smaller proportion said they would be open to reporting their gender pay gap analysis **externally** (21%).

**Table 4.2: Employer openness to reporting the gender pay gap internally and externally**

|                                | %<br>internal | %<br>external |
|--------------------------------|---------------|---------------|
| Would be open to it            | 38            | 21            |
| Would be indifferent to it     | 31            | 36            |
| Would be against it            | 13            | 20            |
| It would depend on the figures | 1             | 2             |
| Don't know                     | 18            | 20            |
| <b>Base (N)</b>                | <b>174</b>    | <b>177</b>    |

Source: IES/Ecorys survey of medium-sized businesses, 2011

The proportion of medium-sized organisations open to the idea of reporting the gender pay gap internally is lower than the proportion of large employers that are open to the idea (47 %). Nearly one-third (30%) of large employers<sup>5</sup> were open to the idea of reporting gender pay gap data externally, again higher than the proportion among medium-sized employers (21%).

Those organisations that indicated they were against external reporting of gender pay review data were asked why (Table 4.3). The main reason was the same as that given for not wanting to report internally, with employers saying that it was company policy not to discuss pay. The 'other' reasons given by employers were varied. They included a lack of clarity about the value and purpose of undertaking such an activity, some employers also reiterated that it would lack purpose because they did not have a gender pay gap, and others reported that they viewed such data as private company business.

<sup>5</sup> Adams et al. (2010), Figure 4.2.

**Table 4.3: Why organisations are against external reporting of gender pay review**

|  | <b>N</b>  | <b>%<br/>of cases</b> |
|--|-----------|-----------------------|
| Company policy is not to discuss pay                 | 10        | 28                    |
| Do not see gender pay gaps as an issue to address    | 9         | 25                    |
| Do not have the resource or manpower to do this      | 6         | 16                    |
| Worries/concerns about uncovering problems           | 3         | 10                    |
| Previous negative experience of reporting externally | 2         | 7                     |
| Don't know   | 2         | 6                     |
| Not sure how to do this in the right way             | 1         | 2                     |
| Other  | 12        | 34                    |
| <b>Base (N)</b>                                      | <b>36</b> |                       |

Multiple response variable.

Asked to those organisations indicating they were against reporting externally.

Source: IES/Ecorys survey of medium-sized businesses, 2011

Employers that were not reporting gender pay review data externally were asked what might encourage them to do so (Table 4.4). For all the options, such as advice on how to report, the proportion of employers agreeing or strongly agreeing that they could encourage a change in behaviour ranged from 46 to 50 per cent, and the proportion disagreeing or strongly disagreeing ranged from 25 to 28 per cent. This indicates that there could be merit in all of the proposed factors, and interestingly 'push' and 'pull' factors got similar levels of agreement in contrast to the factors that would encourage organisations to undertake gender pay gap reviews (see Table 3.9).

**Table 4.4: Factors that might encourage employers to report gender pay review analysis externally**

|                            | <b>Employers encouraged by advice on how to report clearly %</b> | <b>Employers encouraged by competitors doing the same %</b> | <b>Employers encouraged by being able to report with an explanation of the figures %</b> | <b>Employers encouraged by an employee taking action or complaining %</b> |
|----------------------------|--|---|--|---|
| Strongly agree             | 10   | 10  | 10   | 15  |
| Agree                      | 37   | 36  | 37   | 35  |
| Neither agree nor disagree | 18   | 19  | 20   | 16  |
| Disagree                   | 17   | 17  | 16   | 16  |
| Strongly disagree          | 11   | 9   | 10   | 9   |
| Don't know                 | 8  | 9   | 9  | 10  |
| <b>Base (N)</b>            | <b>175</b>   | <b>175</b>  | <b>175</b>   | <b>175</b>  |

Source: IES/Ecorys survey of medium-sized businesses, 2011

Those employers that disagreed with all of the factors that might encourage them to report gender pay review analysis externally, were asked an open-ended question about what might encourage them (N=85). Of these just over one-half (55%) said that they would only report externally if required by law, and 13 per cent said that nothing would encourage them. This indicates that for a group of employers only 'push' factors would encourage them to take action on reporting externally.

# 5 Findings from Qualitative Interviews

## 5.1 Sample size

As stated in the methodology (Section 1.3.2) the qualitative interviews were aligned into three groups: organisations that do not analyse their pay data to explore the gap between men and women's average pay (Group 1); organisations that analyse data but do not publish it (Group 2); and, organisations that analyse and publish equality information (Group 3). In Group 1 17 in-depth interviews were carried out with 11 employers, and 6 interviews were carried out with employers in Group 2. No employers were interviewed from Group 3, although several attempts were made to do so. This chapter looks in more detail at employers within these groups and explores their behaviour in relation to gender pay gap analysis and reporting.

## 5.2 Employer context

### 5.2.1 Structure of the HR function

Within the participating organisations, the human resources (HR) function was small, with almost all of the employers having only one or two people dedicated to an HR role. One organisation outsourced their entire HR function. There was little difference in the size of the HR function and the difference in the extent of analysis of equality data.

Where organisations were conducting analysis of pay data by gender (Group 2), this was completed by HR at all of the organisations, with the exception of one employer. At this organisation the gender pay analysis was put out to tender every three years and an external consultancy conducted the work.

The analysis of gender pay was commonly a process driven by HR, as opposed to senior management. At none of the organisations was the analysis first conducted because of internal equal pay concerns.

## 5.3 Prioritising and tackling the gender pay gap

### 5.3.1 The importance of the achievement of equal pay

References to equality and equal pay do not explicitly appear in the business objectives of the organisations interviewed, with the exception of one organisation (from Group 2). However, despite equality references being absent from business objectives, most organisations felt the achievement of equal pay in the organisation was important.

Within Group 1, despite not having conducted any analysis of gender pay, organisations held the view that they did not have an equal pay issue because the same salary was paid to individuals in equivalent roles regardless of gender. There was perceived to be little flexibility in pay levels, which could cause a gender bias, and organisations seemed to be unaware that ensuring equality stretches beyond equal pay for work of equal value. There was a failure to acknowledge any other factors within pay systems that can lead to inequalities: for example, employees being appointed to different points on the salary scale; bias in the access to shift work or bonuses or training; and different job titles used to describe similar roles.

Some organisations in Group 2 demonstrated a relatively more sophisticated awareness of the value of ensuring equal pay. For example, one organisation wanted to demonstrate equal pay in order to achieve 'outstanding' ratings and be placed in 'best companies' lists.

#### **5.4 Plans for reducing the gender pay gap and increasing workforce diversity**

All organisations interviewed felt that a pay gap in an organisation was something that should be addressed. The reasons given included 'culturally we strive to be as fair as we can'; 'it's better to deal with {a gap} before it blows up into a grievance'. However, as all the organisations considered that they had equal pay, there was no action planned to address gender pay inequality.

Action to increase workforce diversity was not seen as an area of priority among the organisations interviewed. They tended to describe recruiting the 'best person for the job' regardless of the candidate's diversity characteristics. Only two of the employers interviewed within Group 1 had taken any action or had any action planned to address workforce diversity. One employer in Group 1 described how they had used positive discrimination and recruited a candidate from an ethnic minority background in one round of recruitment where they had two appointable candidates with equivalent levels of skills and experience.

The same organisation had tried to engage girls in engineering through career fairs and working with local schools, but admitted that it had seen little return on these efforts. Another organisation tried to target under-represented groups in its recruitment in an attempt to represent better the local community. In Group 2, there was slightly more evidence of trying to increase the diversity of the workforce through monitoring of workforce characteristics and applications, for example, through considering where to advertise vacancies to ensure a diverse range as possible of candidates applying. Employers in sectors such as manufacturing and construction sometimes mentioned a lack of applications from women and felt that this had led to their workforce being relatively homogeneous. Other employers explained their relative diversity in relation to the demographic characteristics of their recruitment area.

#### **5.5 Analysis of the gender pay gap**

##### **5.5.1 Reasons for non-analysis of data**

The reasons for not analysing data on the differences in equality and diversity within the organisations taking part in the qualitative interviews were broadly grouped into three main themes:

- Assumptions that because the salary structure offers little flexibility in earnings, there was 'no reason to analyse it as men and women in the same position get paid the same' (five organisations).
- Organisations have heavily male-dominated workforces and therefore few female comparators; or the women employed perform completely different jobs to the men (three organisations).
- A lack of adequate HR systems, which makes it difficult to collate information for analysis (three organisations).



The interviews also revealed that several organisations that did not conduct analysis of gender pay lacked internal knowledge about how to accurately measure a gender pay gap and the skills required to conduct the analysis. Despite this lack of knowledge all organisations stated they would resource the task internally if they were to start reporting on the gap. This lack of knowledge about how to approach the analysis could also be a contributing factor to why these organisations do not conduct work in this area. Three organisations stated they would seek advice from an external organisation and two organisations specifically stated they would contact their trade body for advice on reporting.

### **5.5.2 Data analysis**

Of those organisations conducting the analysis, they were doing so yearly or on an ad hoc basis, with the exception of one organisation that monitored the gap every three years. The type of data that are analysed varied across the organisations, but the most common measure used was the full-time and part-time comparison, although an analysis of total pay was also mentioned. Only two organisations conducted any analysis on maternity leavers. This captured whether maternity leavers returned to their same job, whether they returned part-time and salaries on return.

Respondents in Group 2 were informed about how to conduct the analysis through both internal and external sources, such as the Chartered Institute of Personnel and Development (CIPD) and XpertHR, and internally, with help and advice from accounts.

### **5.5.3 Difficulties in analysis**

The organisations analysing gender pay information reported few difficulties in conducting the analysis, mainly due to the presence of adequate HR systems. One organisation reported that they did not encounter difficulties in conducting the analysis, but that the real challenge was 'getting the senior team engaged with it'.

## **5.6 Causes of the gender pay gap**

None of the organisations interviewed reported the existence of a current gender pay gap. Where organisations had done an analysis in the past that had revealed gender pay differentials, these were found to be justifiable due to occupational segregation and more men in higher-paid positions. However, looking at the reasons behind occupational segregation in organisations and looking at what could be done internally to encourage female employees to seek promotion into more senior roles could be a focus of future work for these organisations. There was evidence from one organisation that results from the analysis prompted re-evaluation of posts, which potentially could have prevented costly equal pay cases.

## 5.7 Factors and support that would encourage formal gender pay gaps reviews

Organisations were asked what would encourage them to report voluntarily the gender pay gap and other equality data. The strongest messages from the participants about voluntary reporting were:

- Participants would not report this information unless they were legally required to do so. The role of legislation was a common theme across the responses. Organisations were aware that achievement of equal pay was important to comply with equal pay legislation and to ensure they did not have vulnerabilities in this area, but they commonly agreed that they would only begin reporting if legislation deemed it necessary. One organisation also thought that mandatory reporting would help engage senior managers reflecting that ‘when things fall in the context of employment law they become easier to sell to the senior people’.
- A requirement for more guidance was also expressed by organisations: for example, in how to undertake a gender pay analysis; how to communicate the appropriate message; and examples of organisations that have shared information. Several organisations thought that being able to compare pay gap and diversity information with other organisations would be useful for benchmarking purposes.

## 5.8 Reporting of the gender pay gap

### 5.8.1 Measures for reporting

Employers taking part in the in-depth interviews reported that it was important that any data on gender pay gaps was easy to use. Some employers thought that they might consider measuring and reporting the full- and part-time gender pay gap, and/or provide a written account of gender pay, which puts any identified gaps into context and explains any disparities. Within this written account respondents felt that including information on the organisation, its business and HR strategy, and wider diversity and human capital information would be useful to include, alongside explanations of any gender pay gaps identified.

### 5.8.2 Reporting internally and externally

#### Reporting to the board/and or management team

A report to the board was considered to be the most likely way of reporting findings of men and women’s representation at different levels and/or the gender pay gap. However, getting the board engaged with the findings was thought to be a significant challenge.

#### Reporting internally to staff

The level of reporting internally was thought to depend on what the analysis showed: ‘we would tell them if it’s good and won’t tell them if it’s bad’. Organisations in Group 2 were generally not reporting to staff and were considering this. The main reason for this was that they had not considered sharing this information with staff, and it was generally assumed that staff would not be interested in this type of analysis.

Only one organisation in Group 2 already reported the findings of its gender pay and equality analysis to staff. This was done through a Staff Joint Negotiating Body and therefore this relies on representatives discussing the findings with staff members.

#### Reporting externally

Six organisations stated they would consider reporting findings externally, although some of these did not currently undertake any analysis of gender pay gap data. The assumption that these organisations had established equal pay was the common driver for this willingness to share externally as they supposed they had 'nothing to hide'.

### **5.8.3 Voluntarily publishing information externally**

There were mixed opinions expressed about whether organisations should voluntarily publish information on gender pay externally.

#### Against voluntarily publishing

The reasons participants gave for not thinking organisations should publish gender pay information included the burden of significant existing reporting requirements; participants lacked an understanding of the benefits of transparency; and it was regarded as 'reporting for reporting's sake'.

#### Reasons for voluntarily publishing

Some organisations in Group 1 thought that they should voluntarily publish information on gender pay externally, the reasoning being to support their current transparent organisational cultures and confidence in their own position on demonstrating equal pay. A few organisations in Group 2 also thought that this information should be voluntarily reported; these organisations also felt confident in their own position on equal pay.

### **5.8.4 Reporting results of formal gender pay gap reviews externally**

The perceived costs of greater transparency on equality and wider availability of information on equality were mainly related to time and resources and protecting the organisation's competitive position. The benefits for the organisation were broadly connected to helping with recruitment and retention and achieving a competitive advantage. More detailed comments on the costs and benefits of greater transparency are given in Annex 3.

# 6 Conclusions

This research set out to establish the quantity and quality of transparency on equalities, specifically gender pay gaps and workforce diversity, in medium-sized organisations with between 150 and 249 employees. The main conclusions coming from the research are listed below.

## 6.1 Thinking about diversity and equality

The research found that most medium-sized employers have some formal equality and diversity policies. The majority (67%) said that workforce diversity was a high business priority and a similarly high proportion also attached a high priority to ensuring there was no gap between men and women's pay (58%). However, whilst it is encouraging that many employers reported the importance of diversity and equality, a far smaller proportion had planned approaches either to increase diversity in the workforce or to reduce the gender pay gap. Attitudes and actions within medium-sized organisations did not always match.

Many medium-sized businesses have the data available to perform gender pay gap analysis and most kept their human resources (HR) and payroll records electronically. However, many do so on separate systems and nearly one in five (17%) said that they would find it difficult to combine them. A lack of combined electronic systems was not the only barrier to analysing gender pay data: some pieces of diversity data were more likely to be collected as part of the personnel record than others and in almost one-fifth of medium-sized organisations data were missing on gender and/or current salary, making gender pay analysis impossible.

Openness about pay was rare, with less than one in twenty medium-sized organisations making staff aware of how much colleagues in the same role were paid. In a similar number of businesses, staff were not allowed to discuss pay with colleagues at all. This lack of transparency in relation to pay may influence how a business approaches gender pay gap analysis and reporting.

## 6.2 Acting on diversity and equality

While many organisations collected the data necessary to analyse workforce diversity and the gender pay gap, the incidence of gender pay gap reporting was not as high. The research found that nearly one-third (32%) of medium-sized employers had conducted some analysis of the gender pay gap in the past and a further 11 per cent had plans to do so in future. In addition, ten per cent of medium-sized employers were in the process of conducting a formal gender pay gap review at the time of the survey, and a similar proportion had conducted a formal review previously.

## 6.3 Reporting on diversity and equality

The incidence of reporting on the gender pay gap among medium-sized employers was low (although at similar levels to larger employers with 250 or more employees); four per cent of these employers reported findings internally and a similar proportion reported their findings externally. The main internal audience for gender pay gap data were board members and senior managers. When prompted, 38 per cent of employers that had not reported gender pay gap review data said they would be open to doing so internally, and 21 per cent said they would be open to reporting their gender pay gap analysis externally.

## 6.4 Barriers to undertaking and reporting gender pay gap reviews and increasing workforce diversity, and how to overcome them

The most common reason given by medium-sized employers for not conducting a gender pay gap review was not a lack of data, knowledge or skills to undertake such analysis, or even awareness, but that organisations considered that they already provided equal pay. Overcoming the belief among employers that pay reviews and equality reporting are not relevant to their organisation, because they believe they already provide equal pay, presents a real challenge. There remained a lack of understanding among many medium-sized employers that equality was more than equal pay for work of equal value. The qualitative research also illustrated the importance of getting buy-in to undertaking gender pay gap analysis and reporting at a senior level.

A small number of employers said that they would like additional web-based support to advise them on how to measure the pay gap, and/or an advice line but in the main, employers reported that they did not require additional help to undertake gender pay gap reviews.

Two of the main motivators that might make organisations analyse the gender pay gap in future were legislation or an employee making a complaint or taking action. Both of these influences could be seen as 'push' factors, and may be beyond the scope of a voluntary approach. The 'pull' factors, such as to be a good practice employer were cited by far fewer employers.

Barriers to internal reporting of gender pay gaps were discussed in the qualitative interviews and seem to be partly due to a perceived lack of interest among staff about equality reporting and simply because HR have never thought to share the information with staff, rather than a strong desire to keep the analysis confidential. These were encouraging findings for a voluntary approach, and by promoting the purpose and benefits of gender equality reporting in organisations, this may encourage more organisations to share findings with staff.

It appeared that encouraging external reporting will continue to be a challenging area. The factors that might influence employers to report gender pay gap analysis and review data externally again included a range of push and pull factors with around one-half of all medium-sized organisations saying they would consider doing so:

- if advice on how to report clearly was available;
- if competitors did the same;
- if they were able to report and provide an explanation of the figures; and/or
- if an employee took action or complained.

This suggests an openness to this activity in future among some employers and policy could explore ways to make external reporting more of a norm. However, just over one-half of all medium-sized employers that did not think these factors would change their reporting behaviour said they would only report externally if they were required to do so by law. Over one in ten of these employers said nothing would encourage them to report gender pay gap analysis externally.

Despite many medium-sized organisations being committed to workforce diversity and equality in policies, and to collecting relevant data, there remains some way to go before a lot of medium-sized employers would undertake workforce diversity and gender pay gap analysis and report these findings. A first step would be to encourage organisations to analyse their existing data and support them in doing this, for example, through professional organisations or networks. This would be an initial step towards voluntary reporting and start to turn employer thinking into action. It seems clear from this research that there will still be those who will not do so until there is a stronger compulsion or legal requirement to comply.

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# Annex I: Methodology and Questionnaire

## Detailed survey methodology

This survey was conducted by Ecorys Survey by means of telephone interviews with human resources (HR) professionals or the person within the company having responsibility for HR matters. In the course of the survey the methodology was extended to include a web version, the rationale for which is shown below.

## Sample and sampling

The target population was defined as companies in England, Scotland and Wales employing between 150 and 249 people. Public sector organisations were to be excluded. To make the survey comparable with the earlier work with companies employing 250 or more people, the same sectors were defined: manufacturing and construction; distribution, hotels and restaurants; banking, finance and insurance; and other private services. The target sample was 500 achieved interviews.

It was agreed that the sample was to be broadly representative by sector and country but that there would be no further sub-division by size.

A database was purchased from Dun and Bradstreet (also used as a source for the earlier sample of larger companies). Initially 3,194 records were purchased: 2,838 for England, 242 for Scotland and 114 for Wales (the two latter being slightly increased to ensure sufficient records to obtain the required sample numbers). Priority was given to records with named HR contacts and to those with telephone numbers – beyond that, a random sample was taken. Dun and Bradstreet claim to have more than 99 per cent coverage of those countries so the research team could be confident that the sample was as representative as possible.

## Pilot stage

A small pilot of ten interviews was conducted and some minor amendments made to the questionnaire. Interview time was around 20 minutes and it was decided that it was manageable.

## Inclusion of a web version

Once the main survey interviewing began progress was much slower than expected. The relevant people in the contacted companies proved difficult to speak to directly, and often did not keep firm appointments. The main reason given was lack of time; at this stage few overtly declined due to the subject matter. In companies of this size, it was sometimes found that the person with HR responsibility also had other responsibilities, such as finance, which may have contributed to the lack of time.

It was also found that a larger than expected proportion did not have the necessary number of employees; when the interviewing was complete 21 per cent had been excluded because they had too many or too few employees. The more likely reason was that the organisations had contracted during the recession. The timing of the research may also have had an effect on the response rate because it was close to the Easter period, which also included the May Day and Royal Wedding bank holidays and it was found that many people were taking holidays



To boost response, it was agreed to set up a web version and send an invitation out to take part. It was not possible to obtain email addresses for all the contacts but invitations were sent to more than 900 contacts by email and 500 by letter. This produced fewer than ten responses. This was a very disappointing response and caused the research team to conclude that, as well as the other reasons given, it may have been that the subject matter was putting people off from taking part.

The email content and the introduction used by the telephone interviewers was revised by the Institute for Employment Studies (IES) to make it more 'bland' and less likely to cause people to refuse; references were made to 'fairness' rather than 'equality' or the gender pay gap. Two email reminders were sent out using the amended wording but the total number of responses via the web survey was only 24. Of the 185 responses 161 were completed by telephone and 24 by web.

### Final sample

Telephone interviewing continued until the planned time and budget was exhausted, resulting in a final sample of 185. To achieve this, the interviewers made 8,958 calls and undertook over 597 hours of interviewing. There were 626 refusals. The table below outlines how the sample was used.

**Table A.1: Outline of how the sample was used**

|  | <b>Number of organisations</b> |
|--|--------------------------------|
| Interview achieved   | 185                            |
| Non-qualifier (too many or too few employees)                            | 677                            |
| Unreachable/unusable numbers   | 205                            |
| Refusals   | 626                            |
| Unfinished numbers, i.e. no conclusion at the time interviewing finished | 1,501                          |
| <b>Total</b>   | <b>3,194</b>                   |

### Confidence levels

The level of confidence that may be attached to the achieved sample of 185, at the 95% level, is +/-7.2 per cent. That is if a response of 50 per cent is given by the sample, it would be 95 per cent certain that the figure for the whole population would be in the range 42.8 per cent to 57.2 per cent.

## Weighting the data

**Table A.2: The population of organisations with 150-249 employees**

|                                      | <b>Organisations<br/>with<br/>150—249<br/>employees</b> |
|--------------------------------------|---|
| Manufacturing and construction       | 2,349   |
| Distribution, hotels and restaurants | 2,240   |
| Banking finance and insurance        | 1,213   |
| Other private services               | 2,791   |
| <b>Total</b>                         | <b>8,593</b>  |

Source: Dun and Bradstreet Market Insight figures

Table A.2 shows the population of organisations with between 150 and 249 employees by broad sector, as detailed in the Dun and Bradstreet database that provided the sample source for this research.

The achieved sample was checked against the profiles provided by the Dun and Bradstreet data and weightings were applied on a sector basis. The weighting approach broadly reflected the sectoral distribution within the population, but drew precisely on the distribution within the sample frame, as this excluded some peripheral businesses. The country profile was sufficiently accurate for weighting to be unnecessary. The table below shows the weighting calculation.

**Table A.3: Weighting Calculations**

|                        |                                      |                  |
|------------------------|--------------------------------------|------------------|
|                        |                                      | <b>Frequency</b> |
| <b>Sample frame</b>    | Manufacturing and construction       | 1,451            |
|                        | Distribution, hotels and restaurants | 1,188            |
|                        | Banking, finance and insurance       | 594              |
|                        | Other private services               | 1,554            |
|                        | <b>Total</b>                         | <b>4,787</b>     |
|                        |                                      | <b>Frequency</b> |
| <b>Achieved sample</b> | Manufacturing and construction       | 76               |
|                        | Distribution, hotels and restaurants | 38               |
|                        | Banking, finance and insurance       | 20               |
|                        | Other private services               | 51               |
|                        | <b>Total</b>                         | <b>185</b>       |
|                        |                                      | <b>Frequency</b> |
| <b>Adjusted sample</b> | Manufacturing and construction       | 56               |
|                        | Distribution, hotels and restaurants | 46               |
|                        | Banking, finance and insurance       | 23               |
|                        | Other private services               | 60               |
|                        | <b>Total</b>                         | <b>185</b>       |
|                        |                                      | <b>Weighting</b> |
| <b>Weight used</b>     | Manufacturing and construction       | 0.738            |
|                        | Distribution, hotels and restaurants | 1.208            |
|                        | Banking, finance and insurance       | 1.148            |
|                        | Other private services               | 1.178            |

The weighting approach used in this report is different to the weighting approach used in the large employer survey by Adams et al. (2010), in part because there was no technical Annex for the previous survey. The reporting of the large employer survey gives unweighted base figures throughout the report, and the findings are extrapolated to the population by giving weighted bases. Given the lower than planned response rate for the medium-sized employer survey, the larger population and subsequent impact on the confidence intervals (+/- 7.2 %), only unweighted bases are given in the tables throughout the report, and not the grossed up figures, so as not to create undue confidence in the accuracy in the numbers presented.

## **Analytical approach**

Due to the sample size frequencies were calculated for the data. Differences in responses by other characteristics, such as sector, were not undertaken due to the size of the sample.

## **Potential limitations and biases**

The response rate was relatively low. The potential reasons could include the fieldwork taking place during a holiday period, and the challenging economic environment. This could have limited the number and types of businesses able to respond. There were a number of instances where there were 'gatekeepers' who declined to participate, rather than the person with responsibility for HR. In other instances there were businesses that refused straight away as it was not their policy to participate in surveys. There could be some bias introduced through non-responses.

Some businesses were screened out of the survey as they did not have the required number of employees. In some instances this was due to recent staff reductions. It is likely that the lag in the sample may have affected its accuracy and that some businesses with 250 or more employees, and therefore excluded in the criteria when the sample was purchased, could have been in the population at the time of the survey.

## **Future surveys**

The failure to achieve the target 500 interviews can be attributed to a number of factors, including the timing of the research (near to the end of the financial year and close to holiday periods) and perhaps the nature of the HR function in companies of this particular size (often combined with other roles). The researchers also think that the nature of the topic was off-putting, as evidenced by the lack of response to the web survey approach when people had the opportunity to see the explanation of the survey but still showed a lack of interest.

For future surveys the researchers suggest: a different timescale (maybe autumn when there are fewer demands on time); conducting the survey across a wider size range of companies (21% of the sample were lost because they were the 'wrong' size, if all sizes were surveyed the success rate would have been higher), finding a way to make the topic more relevant/appealing to HR personnel (the experience of the web approach suggests that a simple advance email may not be sufficient. Perhaps a small qualitative research element at the beginning of future surveys would uncover the real attitudes of HR people in companies of this size and help to prepare for a wider scale approach).

## Questionnaire

The questionnaire numbering reflects that used in the large employer survey (Adams et al., 2010) for comparability. The large employer questionnaire was slightly reduced and restructured for use with medium-sized employers, and therefore the question numbers are not always sequential.

### **Type CATI introduction text**

#### **Text Voluntary Equality Reporting In Medium-sized Businesses: Baseline survey 2011**

Good morning/afternoon, my name is <%~\_IterName\_%> calling from Ecorys, an independent research company on behalf of the Government Equalities Office.

Please can I speak to <%~Name%> / IF NO NAME: your Human Resources or Personnel Manager or Director] ?

INTERVIEWER NOTE: IF NO HR MANAGER / DIRECTOR – ASK TO SPEAK TO MOST SENIOR PERSON WITH RESPONSIBILITY FOR HR. Please enter the name and Job title of the respondent.

ALL: We are conducting a project on behalf of the Government Equalities Office to help them to understand how, if at all, businesses such as yours are analysing and reporting equality and diversity issues such as the pay gap between men and women.

INTERVIEWER ADD IF NECESSARY: The GEO is responsible for co-ordinating policy on women and gender equality issues in Government.

INTERVIEWER ADD IF NECESSARY I.E. ONLY IF ASKED SPECIFICALLY ABOUT WHY CONDUCTING INTERVIEWS: This is your opportunity to inform government – we would like to get your views on the wider issues and we will explain the relevant areas you need to know about.

Can I just check that you are an appropriate person to speak to regarding your company's HR strategy, including your remuneration and equality & diversity policies?

The interview should take between 15 and 20 minutes, depending on your answers. Are you available to speak now?

REASSURE IF NECESSARY: GEO is not checking up on companies, and you are under no legal obligation to be doing anything in this area at present. The study is to look at current business practice among organisations of your size in terms of the extent of analysis and transparency on equality data, specifically around gender pay gaps, and on workforce diversity.

All your responses will be treated in the strictest confidence, and nothing will be attributed to any individual or company. The GEO will not be told the names of organisations participating in the survey.

### A3

|                     |   |                                     |                |                      |
|---------------------|---|-------------------------------------|----------------|----------------------|
| <b>Questiontype</b> | Single response   |                                     |                |                      |
| <b>Text</b>         | Would you classify your organisation as one MAINLY seeking to make a profit, as a charity / voluntary sector organization, as a local-government financed body, or as a central government financed body? |                                     |                |                      |
| <b>Items</b>        | <b>Code</b>   | <b>Description</b>                  | <b>Routing</b> | <b>Open category</b> |
|                     | 1   | Seeking a profit                    |                |                      |
|                     | 2   | Charity / voluntary sector          |                |                      |
|                     | 3   | Local government financed body      | endI           |                      |
|                     | 4   | Central government financed body    | endI           |                      |
|                     | 5   | None of the above / other (SPECIFY) |                | •                    |
| <b>Routing</b>      | A4  |                                     |                |                      |

### A4

|                     |  |                     |
|---------------------|--|---------------------|
| <b>Questiontype</b> | Numerical  |                     |
| <b>Text</b>         | How many employees does your company currently employ in Great Britain?<br>IF NECESSARY: Please include all full and part time staff, but exclude agency workers or self-employed contractors. |                     |
| <b>Properties</b>   | <b>Property</b>  | <b>Value</b>        |
|                     | Whole numbers only   | Yes                 |
|                     | None/don't know  | Yes                 |
|                     | None title   | Don't know/ Refused |
| <b>Routing</b>      | A4a  |                     |

## A4a

|                     |  |                    |                |
|---------------------|--|--------------------|----------------|
| <b>Questiontype</b> | Single response  |                    |                |
| <b>Text</b>         | INT: IF DK PROMPT WITH RANGES / IF ANSWER GIVEN PLEASE CODE RANGES ACCORDINGLY |                    |                |
| <b>Items</b>        | <b>Code</b>  | <b>Description</b> | <b>Routing</b> |
|                     | 1  | Over 250           | end I          |
|                     | 2  | Between 150-250    |                |
|                     | 3  | Less than 150      | end I          |
|                     | 4  | Don't know         | end I          |
| <b>Routing</b>      | gr I   |                    |                |

## A5

|                     |   |                                 |
|---------------------|---|---------------------------------|
| <b>Questiontype</b> | Single response   |                                 |
| <b>Text</b>         | I have <BusinessActivities> as a description of your main business activity. Is this correct? |                                 |
| <b>Items</b>        | <b>Code</b>   | <b>Description</b>              |
|                     | 1   | Yes CHECK QUOTAS AND MOVE TO A6 |
|                     | 2   | No                              |
|                     | 3   | Don't know                      |
| <b>Routing</b>      |   |                                 |

## A5a

|                     |  |
|---------------------|--|
| <b>Condition</b>    | (A5 = 2) or (A5 = 3)   |
| <b>Questiontype</b> | Open ended   |
| <b>Text</b>         | Please could you describe to me your main business activity?<br>WRITE IN |
| <b>Routing</b>      |  |

## A5RAN

|                     |  |  |
|---------------------|--|--|
| <b>Questiontype</b> | Single response  |  |
| <b>Text</b>         | INTERVIEWER: CODE TO SECTOR BASED ON DESCRIPTION OF MAIN BUSINESS ACTIVITY |  |
| <b>Items</b>        | <b>Code</b>  | <b>Description</b>   |
|                     | 1  | Manufacturing and construction CHECK QUOTAS AND MOVE TO A6 |
|                     | 2  | Distribution, hotels and restaurants                       |
|                     | 3  | Banking, finance and insurance                             |
|                     | 4  | Other private services                                     |

## A6

|                     |  |                    |
|---------------------|--|--------------------|
| <b>Questiontype</b> | Single response                                    |                    |
| <b>Text</b>         | Does your company ownership lie outside of the UK? |                    |
| <b>Items</b>        | <b>Code</b>  | <b>Description</b> |
|                     | 1  | Yes                |
|                     | 2  | No                 |
|                     | 3  | Don't Know         |
| <b>Routing</b>      | A7   |                    |

## A7

|                     |  |                    |                |
|---------------------|--|--------------------|----------------|
| <b>Questiontype</b> | Single response  |                    |                |
| <b>Text</b>         | Does your organisation have a corporate headquarters located at a separate site? |                    |                |
| <b>Items</b>        | <b>Code</b>  | <b>Description</b> | <b>Routing</b> |
|                     | 1  | Yes                |                |
|                     | 2  | No                 | A9             |
|                     | 3  | Don't Know         | A9             |
| <b>Routing</b>      | A8   |                    |                |



## A8

|                     |   |                    |                      |
|---------------------|---|--------------------|----------------------|
| <b>Questiontype</b> | Multiple response   |                    |                      |
| <b>Text</b>         | Are business decisions typically made at corporate headquarters, or are decisions taken at a local level? |                    |                      |
| <b>Items</b>        | <b>Code</b>   | <b>Description</b> | <b>Open category</b> |
|                     | 1   | Taken at HQ level  |                      |
|                     | 2   | Local level        |                      |
|                     | 3   | Don't know         | •                    |
| <b>Routing</b>      | A9  |                    |                      |

## A9

|                     |   |                    |  |
|---------------------|---|--------------------|--|
| <b>Questiontype</b> | Single response   |                    |  |
| <b>Text</b>         | Is there a trade union presence within your organisation? |                    |  |
| <b>Items</b>        | <b>Code</b>   | <b>Description</b> |  |
|                     | 1   | Yes                |  |
|                     | 2   | No                 |  |
|                     | 3   | Don't Know         |  |
| <b>Routing</b>      | B1  |                    |  |

## BI

|                     |   |  |                  |
|---------------------|---|--|------------------|
| <b>Questiontype</b> | Multiple response   |  |                  |
| <b>Text</b>         | <p>UNDERSTANDING THE BUSINESS</p> <p>I'm interested to get a bit of an understanding of the nature of your workforce –Does your organisation employ any staff in the following job roles?</p> <p>READ OUT IN FULL; CODE ALL THAT APPLY</p> <p>INTERVIEWER NOTE – IF ANSWERED 'NONE' TO ALL PARTS OF BI:<br/>THE INTERVIEW IS ABOUT TO BE TERMINATED BECAUSE YOU HAVE ANSWERED 'NO' TO ALL TYPES OF JOB ROLES. DO YOU WISH TO RE-ASK BI, OR CLOSE THE INTERVIEW?</p> |  |                  |
| <b>Items</b>        | <b>Code</b>   | <b>Description</b>   | <b>Exclusive</b> |
|                     | 1   | Managerial or senior official posts  |                  |
|                     | 2   | Professional or technical roles  |                  |
|                     | 3   | Administrative or secretarial  |                  |
|                     | 4   | Skilled Trades (Such as electricians, mechanics, chefs)  |                  |
|                     | 5   | Customer Facing (Sales, customer service, personal service)                                    |                  |
|                     | 6   | Blue Collar or Manual Labour (Elementary occupations, or process, plant or machine operatives) |                  |
|                     | 7   | None of the above  | •                |
| <b>Routing</b>      | B1count   |  |                  |

## BIA

|                     |  |                         |  |
|---------------------|--|-------------------------|--|
| <b>Condition</b>    | B1Cnt > 1  |                         |  |
| <b>Questiontype</b> | Single response  |                         |  |
| <b>Text</b>         | <p>IF EMPLOY STAFF IN MORE THAN ONE OCCUPATIONAL CATEGORY</p> <p>I would like to find out how your workforce is distributed across these categories. Would you prefer to talk about this in terms of numbers of staff, or percentages of your workforce?</p> |                         |  |
| <b>Items</b>        | <b>Code</b>  | <b>Description</b>      |  |
|                     | 1  | Prefer numbers of staff |  |
|                     | 2  | Prefer percentages      |  |
| <b>Routing</b>      | B2   |                         |  |

## B2

|                     |  |
|---------------------|--|
| <b>Condition</b>    | (B1Cnt > 1) and (B1A = 2)  |
| <b>Questiontype</b> | Numerical  |
| <b>Text</b>         | <p>IF EMPLOY STAFF IN MORE THAN ONE OCCUPATIONAL CATEGORY (AT B1) AND PREFER TO GIVE PERCENTAGES (B1A=2)</p> <p>Please could you tell me the approximate percentage of your workforce that fall into each of these categories? If you are not sure a “best guess” will do.</p> <p>DP NOTE: PLEASE ADD ‘RUNNING TOTALS’. SHOW ONLY OCCUPATIONS MENTIONED AT B1</p> <p>IINTERVIEWER NOTE:There is [% REMAINING] remaining to allocate between [NUMBER OF OCCUPATIONAL CATEOGORIES REMAINING] categories% [DP ALLOW 0-100 FOR EACH]</p> <p>CATI CHECK SUMS TO 100%. IF NOT GO BACK TO B2(1) TO CHECK ANSWERS.</p> |
| <b>Items</b>        | Inclusion from B1  |
| <b>Routing</b>      | B3DUM  |

## B2a

|                     |  |
|---------------------|--|
| <b>Condition</b>    | (B1Cnt > 1) and (B1A = 1)  |
| <b>Questiontype</b> | Numerical  |
| <b>Text</b>         | <p>IF EMPLOY STAFF IN MORE THAN ONE OCCUPATIONAL CATEGORY (AT B1) AND PREFER TO GIVE NUMBERS (B1A=1)</p> <p>Please could you tell me the approximate numbers of staff that fall into each of these categories? If you are not sure a “best guess” will do.</p> <p>INT: Please note the Total should match &lt;~-A4%&gt;, or &lt;~-A4%&gt;.</p> |
| <b>Items</b>        | Inclusion from B1  |
| <b>Routing</b>      | B3DUM  |

**B3DUM**

|                     |  |
|---------------------|--|
| <b>Condition</b>    | BICnt > 1  |
| <b>Questiontype</b> | Single response  |
| <b>Text</b>         | <p>INT: DON'T ASK. SELECT LARGEST EMPLOYEE GROUP FROM PREVIOUS QUESTION.</p> <p>IF TWO OR MORE ARE EQUAL, PICK ONE OF THOSE AT RANDOM TO BE "LARGEST" –<br/>           PRIORITISE Codes 2-6 OVER MANAGERIAL / SENIOR (1)</p> <p>Managerial or senior official posts-----&lt;%~B2_1%&gt;<br/>           &lt;%~B2a_1%&gt;</p> <p>Professional or technical roles-----&lt;%~B2_2%&gt;<br/>           &lt;%~B2a_2%&gt;</p> <p>Administrative or secretarial-----&lt;%~B2_3%&gt;<br/>           &lt;%~B2a_3%&gt;</p> <p>Skilled Trades -----&lt;%~B2_4%&gt;<br/>           &lt;%~B2a_4%&gt;</p> <p>Customer Facing -----&lt;%~B2_5%&gt;<br/>           &lt;%~B2a_5%&gt;</p> <p>Blue Collar or Manual Labour-----&lt;%~B2_6%&gt;<br/>           &lt;%~B2a_6%&gt;</p> |
| <b>Items</b>        | Inclusion from B1  |
| <b>Routing</b>      | B4   |

**B4**

|                     |  |                       |                      |
|---------------------|--|-----------------------|----------------------|
| <b>Questiontype</b> | Single response  |                       |                      |
| <b>Text</b>         | <p>I'd like now to understand how your employees are split by gender; Please could you tell me what percentage of your workforce OVERALL are women? If you do not know a "best guess" will do.</p> <p>WRITE IN NUMBER [DP ALLOW 0-100%].</p> <p>IF DK PROMPT WITH RANGES</p> |                       |                      |
| <b>Items</b>        | <b>Code</b>  | <b>Description</b>    | <b>Open category</b> |
|                     | 0  | Enter Percentage %... | •                    |
|                     | 1  | 0%                    |                      |
|                     | 2  | 10% or less           |                      |
|                     | 3  | 11-25%                |                      |
|                     | 4  | 26-50%                |                      |
|                     | 5  | 51-75%                |                      |
|                     | 6  | 76-90%                |                      |
|                     | 7  | 91-99%                |                      |
|                     | 8  | 100%                  |                      |
|                     | 9  | Don't know            |                      |
| <b>Routing</b>      | B5   |                       |                      |

**B5**

|                     |  |                       |                      |
|---------------------|--|-----------------------|----------------------|
| <b>Condition</b>    | B3DUM <> 1   |                       |                      |
| <b>Questiontype</b> | Single response  |                       |                      |
| <b>Text</b>         | <p>EXCLUDE IF CORE GROUP IS 'Managerial or senior official posts' (B3DUM=1)<br/>         And of all those working as &lt;%~B3DUM%&gt;, what percentage of these are women?</p> <p>WRITE IN NUMBER [DP ALLOW 0-100%].</p> <p>IF DK PROMPT WITH RANGES</p> |                       |                      |
| <b>Items</b>        | <b>Code</b>  | <b>Description</b>    | <b>Open category</b> |
|                     | 0  | Enter percentage %... | •                    |
|                     | 1  | 0%                    |                      |
|                     | 2  | 10% or less           |                      |
|                     | 3  | 11-25%                |                      |
|                     | 4  | 26-50%                |                      |
|                     | 5  | 51-75%                |                      |
|                     | 6  | 76-90%                |                      |
|                     | 7  | 91-99%                |                      |
|                     | 8  | 100%                  |                      |
|                     | 9  | Don't know            |                      |
| <b>Routing</b>      | B6   |                       |                      |

**B6**

|                     |  |                       |                      |
|---------------------|--|-----------------------|----------------------|
| <b>Condition</b>    | B1 contains [1]  |                       |                      |
| <b>Questiontype</b> | Single response  |                       |                      |
| <b>Text</b>         | ASK IF BI_1=1 (IF ORGANISATION HAS MANAGERS OR SENIOR OFFICIALS)<br>And of all those working in Managerial or other senior official posts, what percentage of these are women? |                       |                      |
| <b>Items</b>        | <b>Code</b>  | <b>Description</b>    | <b>Open category</b> |
|                     | 0  | Enter percentage %... | •                    |
|                     | 1  | 0%                    |                      |
|                     | 2  | 10% or less           |                      |
|                     | 3  | 11-25%                |                      |
|                     | 4  | 26-50%                |                      |
|                     | 5  | 51-75%                |                      |
|                     | 6  | 76-90%                |                      |
|                     | 7  | 91-99%                |                      |
|                     | 8  | 100%                  |                      |
|                     | 9  | Don't know            |                      |
| <b>Routing</b>      | B9   |                       |                      |

**B9**

|                     |   |                       |                      |
|---------------------|---|-----------------------|----------------------|
| <b>Questiontype</b> | Single response   |                       |                      |
| <b>Text</b>         | <p>Approximately what percentage of your workforce work part time, that is, fewer than 30 hours per week on average?</p> <p>WRITE IN NUMBER [DP ALLOW 0-100%].<br/>           ***INT: Please click on the relevant code if 0 or 100<br/>           IF DK PROMPT WITH RANGES</p> |                       |                      |
| <b>Items</b>        | <b>Code</b>   | <b>Description</b>    | <b>Open category</b> |
|                     | 0   | Enter percentage %... | •                    |
|                     | 1   | 0%                    |                      |
|                     | 2   | 10% or less           |                      |
|                     | 3   | 11-25%                |                      |
|                     | 4   | 26-50%                |                      |
|                     | 5   | 51-75%                |                      |
|                     | 6   | 76-90%                |                      |
|                     | 7   | 91-99%                |                      |
|                     | 8   | 100%                  |                      |
|                     | 9   | Don't know            |                      |
| <b>Routing</b>      | B10   |                       |                      |



**B10**

|                     |  |                       |                      |
|---------------------|--|-----------------------|----------------------|
| <b>Condition</b>    | (B9 <> 1) and (B9 <> 9)  |                       |                      |
| <b>Questiontype</b> | Single response  |                       |                      |
| <b>Text</b>         | <p>IF B9&gt;0 And approximately what percentage of these part time workers are female?</p> <p>WRITE IN NUMBER [DP ALLOW 0-100%].</p> <p>IF DK PROMPT WITH RANGES</p> |                       |                      |
| <b>Items</b>        | <b>Code</b>  | <b>Description</b>    | <b>Open category</b> |
|                     | 0  | Enter percentage %... | •                    |
|                     | 1  | 0%                    |                      |
|                     | 2  | 10% or less           |                      |
|                     | 3  | 11-25%                |                      |
|                     | 4  | 26-50%                |                      |
|                     | 5  | 51-75%                |                      |
|                     | 6  | 76-90%                |                      |
|                     | 7  | 91-99%                |                      |
|                     | 8  | 100%                  |                      |
|                     | 9  | Don't know            |                      |
| <b>Routing</b>      | B11  |                       |                      |

**B I I**

|                     |  |                       |                      |
|---------------------|--|-----------------------|----------------------|
| <b>Questiontype</b> | Single response  |                       |                      |
| <b>Text</b>         | <p>What proportion of employees within your organisation have other flexible working arrangements (excluding part-time working)?</p> <p>NOTE TO INTERVIEWER: if clarification is needed around 'flexible working' the term can include the following: flexi-time, compressed working hours, job sharing, term-time working, zero hours contracts, annualised hours and home working.</p> <p>WRITE IN NUMBER [DP ALLOW 0-100%].</p> <p>IF DK PROMPT WITH RANGES</p> |                       |                      |
| <b>Items</b>        | <b>Code</b>  | <b>Description</b>    | <b>Open category</b> |
|                     | 0  | Enter percentage %... | •                    |
|                     | 1  | 0%                    |                      |
|                     | 2  | 1-4%                  |                      |
|                     | 3  | 5-10%                 |                      |
|                     | 4  | 11-25%                |                      |
|                     | 5  | 26-50%                |                      |
|                     | 6  | 51-75%                |                      |
|                     | 7  | 76-90%                |                      |
|                     | 8  | 91-99%                |                      |
|                     | 9  | 100%                  |                      |
|                     | 10   | Don't know            |                      |
| <b>Routing</b>      | SECTIONC   |                       |                      |

## SECTION C

|                     |  |
|---------------------|--|
| <b>Questiontype</b> | No question  |
| <b>Text</b>         | <p>UNDERSTANDING THE STYLE OF THE BUSINESS</p> <p>Changing the subject slightly now, I'd like to understand a bit about how HR is organised and approached in your organisation.</p> |
| <b>Routing</b>      | c1   |

## C1

|                     |  |                              |
|---------------------|--|------------------------------|
| <b>Condition</b>    | A7 = 1   |                              |
| <b>Questiontype</b> | Single response  |                              |
| <b>Text</b>         | <p>Is your organisation's HR function all based centrally or are any responsibilities devolved to individual sites?</p> <p>READ OUT; CODE ONE ONLY</p> |                              |
| <b>Items</b>        | <b>Code</b>  | <b>Description</b>           |
|                     | 1  | All central                  |
|                     | 2  | Most central, some devolved  |
|                     | 3  | Some central, most devolved  |
|                     | 4  | None central, all devolved   |
|                     | 5  | DO NOT READ OUT – Don't know |
| <b>Routing</b>      | c1a  |                              |

## C1a

|                     |  |  |                      |
|---------------------|--|--|----------------------|
| <b>Condition</b>    | (c1 != 2) or (c1 = 3)  |  |                      |
| <b>Questiontype</b> | Multiple response  |  |                      |
| <b>Text</b>         | Which functions are not determined centrally?<br>READ OUT; CODE ALL THAT APPLY |  |                      |
| <b>Items</b>        | <b>Code</b>  | <b>Description</b>                           | <b>Open category</b> |
|                     | 1  | Pay determined at site level                 |                      |
|                     | 2  | Recruitment done at site level               |                      |
|                     | 3  | Training organised at site level             |                      |
|                     | 4  | Appraisals at site level                     |                      |
|                     | 5  | Pay reviews at site level                    |                      |
|                     | 6  | Benefits administered at site level          |                      |
|                     | 7  | Other functions done at site level (SPECIFY) | •                    |
|                     | 8  | Don't know                                   |                      |
| <b>Routing</b>      | c2   |  |                      |

## C2

|                     |  |                    |  |
|---------------------|--|--------------------|--|
| <b>Questiontype</b> | Single response  |                    |  |
| <b>Text</b>         | Does anyone have “ensuring equal pay between women and men” as a defined part of their role? |                    |  |
| <b>Items</b>        | <b>Code</b>  | <b>Description</b> |  |
|                     | 1  | Yes                |  |
|                     | 2  | No                 |  |
|                     | 3  | Don't know         |  |
| <b>Routing</b>      | c3   |                    |  |

### C3

|                     |  |                    |
|---------------------|--|--------------------|
| <b>Questiontype</b> | Single response  |                    |
| <b>Text</b>         | Does your organisation provide training in equality and diversity awareness in fair treatment of different types of staff, ie gender, race, age etc? |                    |
| <b>Items</b>        | <b>Code</b>  | <b>Description</b> |
|                     | 1  | Yes                |
|                     | 2  | No                 |
|                     | 3  | Don't know         |
| <b>Routing</b>      | c4   |                    |

### C4

|                     |  |  |
|---------------------|--|--|
| <b>Condition</b>    | c3 = 1   |  |
| <b>Questiontype</b> | Items popup  |  |
| <b>Text</b>         | Which of the following groups attend this training?<br>READ OUT; CODE ALL THAT APPLY |  |
| <b>Items</b>        | <b>Code</b>  | <b>Description</b>                     |
|                     | 1  | Senior managers                        |
|                     | 2  | Staff involved in setting rates of pay |
|                     | 3  | Staff involved in recruitment          |
|                     | 4  | Line managers                          |
|                     | 5  | Other staff members (SPECIFY)          |
| <b>Labels</b>       | <b>Code</b>  | <b>Description</b>                     |
|                     | 1  | Yes                                    |
|                     | 2  | No                                     |
|                     | 3  | Don't know                             |
| <b>Routing</b>      | C4OT   |  |

### C4OT

|                     |  |  |
|---------------------|--|--|
| <b>Condition</b>    | C4_5 = 1   |  |
| <b>Questiontype</b> | Open ended   |  |
| <b>Text</b>         | Which other staff members attended this training... PLEASE SPECIFY |  |
| <b>Routing</b>      | SECTIOND   |  |

## SECTION D

|                     |   |
|---------------------|---|
| <b>Questiontype</b> | No question   |
| <b>Text</b>         | UNDERSTANDING REMUNERATION STRUCTURES<br><br>I'd like to think now about the pay and benefits package you offer your staff. |
| <b>Routing</b>      | D1  |

## D1

|                     |   |                             |
|---------------------|---|-----------------------------|
| <b>Questiontype</b> | Single response   |                             |
| <b>Text</b>         | In terms of the total salary (excluding any other benefits such as bonuses, share options, health insurance etc) you offer your staff, how do you think you compare to other organisations in your industry?<br>READ OUT; CODE ONE ONLY |                             |
| <b>Items</b>        | <b>Code</b>   | <b>Description</b>          |
|                     | 1   | Significantly above average |
|                     | 2   | A bit above average         |
|                     | 3   | Around average              |
|                     | 4   | A bit below average         |
|                     | 5   | Significantly below average |
|                     | 6   | DO NOT READ OUT: Don't know |
| <b>Routing</b>      | D2  |                             |

## D2

|                     |  |   |                      |                  |                  |
|---------------------|--|---|----------------------|------------------|------------------|
| <b>Questiontype</b> | Multiple response  |   |                      |                  |                  |
| <b>Text</b>         | Do you offer any of the following benefits on top of salary? IF YES: Which benefits do you offer?<br>READ OUT; CODE ALL THAT APPLY |   |                      |                  |                  |
| <b>Items</b>        | <b>Code</b>  | <b>Description</b>                                      | <b>Open category</b> | <b>Exclusive</b> | <b>Inclusion</b> |
|                     | 1  | Bonuses based on the overall performance of the company |                      |                  |                  |
|                     | 2  | Bonuses based on individual performance                 |                      |                  |                  |
|                     | 3  | Bonuses based on team performance                       |                      |                  |                  |
|                     | 4  | Pension   |                      |                  | -                |
|                     | 5  | Company cars  |                      |                  |                  |
|                     | 6  | Share options   |                      |                  |                  |
|                     | 9  | Other ...please state                                   | •                    |                  |                  |
|                     | 8  | DO NOT READ OUT – Don't know                            |                      | •                | -                |
|                     | 7  | DO NOT READ OUT – None                                  |                      | •                | -                |
| <b>Routing</b>      | block1   |   |                      |                  |                  |

## D3

|                     |  |  |                      |                  |   |
|---------------------|--|--|----------------------|------------------|---|
| <b>Questiontype</b> | Multiple response  |  |                      |                  |   |
| <b>Text</b>         | And what staff members qualify for <%~_InclItem_%>?<br><br>READ OUT. MULTICODE ON CODES 1-3 and 5. |  |                      |                  |   |
| <b>Items</b>        | <b>Code</b>  | <b>Description</b>   | <b>Open category</b> | <b>Exclusive</b> |   |
|                     | 1  | All staff who have been with the company for a certain number of years |                      |                  |   |
|                     | 2  | All staff above a certain grade / level                                |                      |                  |   |
|                     | 3  | All full time staff (not part time staff)                              |                      |                  |   |
|                     | 4  | Sales teams  |                      |                  |   |
|                     | 5  | All staff  |                      |                  | • |
|                     | 6  | Other (SPECIFY)  | •                    |                  |   |
|                     | 7  | DO NOT READ OUT – Don't know   |                      |                  | • |
| <b>Routing</b>      | <EndOfBlock>   |  |                      |                  |   |

## D4

|                     |   |   |
|---------------------|---|---|
| <b>Questiontype</b> | Single response   |   |
| <b>Text</b>         | When you review salaries, is there an individual performance-related element? |   |
| <b>Items</b>        | <b>Code</b>   | <b>Description</b>  |
|                     | 1   | For all employees there is an individual element                        |
|                     | 2   | For employees in a particular grade/role there is an individual element |
|                     | 3   | There is no individual performance element for any employee             |
|                     | 4   | DO NOT READ OUT – Don't know  |
| <b>Routing</b>      | D5  |   |

## D5

|                     |  |                             |
|---------------------|--|-----------------------------|
| <b>Questiontype</b> | Single response  |                             |
| <b>Text</b>         | Are there set pay bands for each job role into which an employee's salary must fall? |                             |
| <b>Items</b>        | <b>Code</b>  | <b>Description</b>          |
|                     | 1  | Yes                         |
|                     | 2  | No                          |
|                     | 3  | It varies by job role       |
|                     | 4  | DO NOT READ OUT: Don't know |
| <b>Routing</b>      | D6   |                             |



**D6**

|                     |  |  |                      |
|---------------------|--|--|----------------------|
| <b>Condition</b>    | (B3DUM <> 1) and ((D5 = 1) or (D5 = 3))  |  |                      |
| <b>Questiontype</b> | Multiple response  |  |                      |
| <b>Text</b>         | IF IT VARIES (D5=3) EXCLUDE IF CORE GROUP IS 'Managerial or senior official posts' (B3DUM=1)<br>IF D5=1 or 3 Are these pay bands based on? |  |                      |
| <b>Items</b>        | <b>Code</b>  | <b>Description</b>   | <b>Open category</b> |
|                     | 1  | A review of job titles   |                      |
|                     | 2  | A factor based analytical job evaluation system (INTERVIEWER: INCLUDES HAY EVALUATION) |                      |
|                     | 3  | A comparison of the job characteristics  |                      |
|                     | 4  | Another grading method (SPECIFY)   | •                    |
|                     | 5  | None of the above but intend to in future  |                      |
|                     | 6  | None of the above  |                      |
|                     | 7  | DO NOT READ OUT – Don't know   |                      |
| <b>Routing</b>      | D7   |  |                      |

**D7**

|                     |  |   |  |
|---------------------|--|---|--|
| <b>Questiontype</b> | Single response  |   |  |
| <b>Text</b>         | Is there a set starting pay for new recruits in each grade/job role? |   |  |
| <b>Items</b>        | <b>Code</b>  | <b>Description</b>  |  |
|                     | 1  | Yes, all new starters recruited onto set rate for appropriate grade/role                                    |  |
|                     | 2  | No, starting pay is determined by recruiting manager  |  |
|                     | 3  | For some roles/grades there is a set rate for other roles/grades managers have discretion to fix the salary |  |
|                     | 4  | Don't know  |  |
| <b>Routing</b>      | D8   |   |  |

**D8**

|                     |   |   |
|---------------------|---|---|
| <b>Questiontype</b> | Single response   |   |
| <b>Text</b>         | Is there a set percentage/flat rate increase for all promotions in each grade/job role? |   |
| <b>Items</b>        | <b>Code</b>   | <b>Description</b>  |
|                     | 1   | Yes, there is a set rate for each grade/role  |
|                     | 2   | No, promotion increase is determined on a case by case basis  |
|                     | 3   | For some roles/grades there is a set rate for other roles/grades managers have discretion to fix the salary |
|                     | 4   | Don't know  |
| <b>Routing</b>      | D10   |   |

**D10**

|                     |  |   |
|---------------------|--|---|
| <b>Questiontype</b> | Single response  |   |
| <b>Text</b>         | Which ONE of the following statements best describes how open your organisation is when it comes to salary levels.Would you say that ...?<br>READ OUT; CODE ONE ONLY |   |
| <b>Items</b>        | <b>Code</b>  | <b>Description</b>  |
|                     | 1  | Staff are formally made aware of how much their colleagues in the same role are paid                    |
|                     | 2  | Staff know the pay band into which their role falls   |
|                     | 3  | Staff are free to talk about it if they wish but there is no information from the company on the matter |
|                     | 4  | Staff are discouraged from talking about it but there is no information from the company on the matter  |
|                     | 5  | Staff have it in their contract that they cannot discuss pay with colleagues                            |
|                     | 6  | It differs between roles  |
|                     | 7  | DO NOT READ OUT – Don't know  |
| <b>Routing</b>      | D11  |   |

## D11

|                     |  |   |
|---------------------|--|---|
| <b>Condition</b>    | (B3DUM <> 1) and (D10 = 6)   |   |
| <b>Questiontype</b> | Single response  |   |
| <b>Text</b>         | IF IT DIFFERS BETWEEN ROLES (D10=6) EXCLUDE IF CORE GROUP IS 'Managerial or senior official posts' (B3DUM=1)<br><br>How open is your organisation when it comes to salary levels within <%~B3DUM%>?<br>READ OUT; CODE ONE ONLY |   |
| <b>Items</b>        | <b>Code</b>  | <b>Description</b>  |
|                     | 1  | Staff are formally made aware of how much their colleagues in the same role are paid                    |
|                     | 2  | Staff know the pay band into which their role falls   |
|                     | 3  | Staff are free to talk about it if they wish but there is no information from the company on the matter |
|                     | 4  | Staff are discouraged from talking about it but there is no information from the company on the matter  |
|                     | 5  | Staff have it in their contract that they cannot discuss pay with colleagues                            |
|                     | 6  | DO NOT READ OUT – Don't know  |
| <b>Routing</b>      | D12  |   |

## D12

|                     |  |   |
|---------------------|--|---|
| <b>Condition</b>    | (BI contains [1]) and (D10 = 6)  |   |
| <b>Questiontype</b> | Single response  |   |
| <b>Text</b>         | IF IT DIFFERS BETWEEN ROLES AND HAVE MANAGERS OR SENIOR OFFICIALS (D10=6 & BI_1=1)<br><br>And how open is your organisation when it comes to salary levels within Managerial and Senior roles? READ OUT; CODE ONE ONLY |   |
| <b>Items</b>        | <b>Code</b>  | <b>Description</b>  |
|                     | 1  | Staff are formally made aware of how much their colleagues in the same role are paid                    |
|                     | 2  | Staff know the pay band into which their role falls   |
|                     | 3  | Staff are free to talk about it if they wish but there is no information from the company on the matter |
|                     | 4  | Staff are discouraged from talking about it but there is no information from the company on the matter  |
|                     | 5  | Staff have it in their contract that they cannot discuss pay with colleagues                            |
|                     | 6  | DO NOT READ OUT – Don't know  |
| <b>Routing</b>      | EIA  |   |

## E1A

|                     |  |                              |
|---------------------|--|------------------------------|
| <b>Questiontype</b> | Single response  |                              |
| <b>Text</b>         | Section E. COLLECTING, MONITORING AND MEASURING SALARY INFORMATION<br><br>I'd now like to ask a few questions about how your organisation records information about your employees' pay. Do you keep your HR and payroll information on a computerised system? |                              |
| <b>Items</b>        | <b>Code</b>  | <b>Description</b>           |
|                     | 1  | Yes on a combined system     |
|                     | 2  | Yes on separate systems      |
|                     | 3  | No, entirely manual          |
|                     | 4  | DO NOT READ OUT – Don't know |
| <b>Routing</b>      | EIC  |                              |

## EIC

|                     |  |                              |
|---------------------|--|------------------------------|
| <b>Questiontype</b> | Single response  |                              |
| <b>Text</b>         | ASK IF RECORDS SEPARATE (EIA=1)<br>How easy is it, or would it be, for you to combine these HR and payroll records to look at data across the two? |                              |
| <b>Items</b>        | <b>Code</b>  | <b>Description</b>           |
|                     | 1  | Very easy                    |
|                     | 2  | Fairly easy                  |
|                     | 3  | Fairly difficult             |
|                     | 4  | Very difficult               |
|                     | 5  | DO NOT READ OUT – Don't know |
| <b>Routing</b>      | E2   |                              |

**E2**

|                     |  |  |                  |                       |
|---------------------|--|--|------------------|-----------------------|
| <b>Questiontype</b> | Multiple response  |  |                  |                       |
| <b>Text</b>         | Which of the following pieces of information are recorded on each employee’s individual personnel/HR record?<br>READ OUT; CODE ALL THAT APPLY. |  |                  |                       |
| <b>Items</b>        | <b>Code</b>  | <b>Description</b>   | <b>Exclusive</b> | <b>Fixed position</b> |
|                     | 1  | Gender   |                  |                       |
|                     | 2  | Age / Date of birth  |                  |                       |
|                     | 3  | Current Salary   |                  |                       |
|                     | 4  | Previous salary / details of pay rises   |                  |                       |
|                     | 5  | Contract status (temporary or permanent)                                       |                  |                       |
|                     | 6  | Working hours  |                  |                       |
|                     | 7  | Ethnicity  |                  |                       |
|                     | 8  | Whether or not they have a disability  |                  |                       |
|                     | 9  | Religious beliefs  |                  |                       |
|                     | 10   | Sexual orientation   |                  |                       |
|                     | 11   | Marital status   |                  |                       |
|                     | 12   | Whether a gender reassignment has occurred                                     |                  |                       |
|                     | 13   | Periods of maternity leave   |                  |                       |
|                     | 14   | Periods of paternity leave   |                  |                       |
|                     | 15   | Periods of adoption leave  |                  |                       |
|                     | 16   | DO NOT READ OUT – Don’t know   | •                | •                     |
|                     | 17   | DO NOT READ OUT – None of these / Do not hold individual records for employees | •                | •                     |
| <b>Routing</b>      | E2a  |  |                  |                       |

## E2a

|                     |  |                               |                      |
|---------------------|--|-------------------------------|----------------------|
| <b>Condition</b>    | E2 contains [3]  |                               |                      |
| <b>Questiontype</b> | Single response  |                               |                      |
| <b>Text</b>         | IF KEEP CURRENT SALARY (E2=3)<br>And are data on individual employee's rates of pay kept...<br>READ OUT; CODE ONE ONLY |                               |                      |
| <b>Items</b>        | <b>Code</b>  | <b>Description</b>            | <b>Open category</b> |
|                     | 1  | On the HR record ONLY         |                      |
|                     | 2  | On payroll ONLY               |                      |
|                     | 3  | On both HR record and payroll |                      |
|                     | 4  | Or somewhere else? SPECIFY    | •                    |
|                     | 5  | DO NOT READ OUT – Don't know  |                      |
| <b>Routing</b>      | E3   |                               |                      |

I'd like to ask some questions now about exploring any gap between men and women's pay. Even if you have an Equal Pay Policy in your organisation we would like to learn about any action you may take to implement your policy.

## E3

|                     |   |  |                |
|---------------------|---|--|----------------|
| <b>Condition</b>    | E2 contains [1,2,3,4,5,6,7,8,9,10,11,12,13]   |  |                |
| <b>Questiontype</b> | Single response   |  |                |
| <b>Text</b>         | IF HAVE RECORDS (E2=1-13)<br>Do you ever analyse any of your pay data to explore the gap between men and women's average pay? PROBE FULLY |  |                |
| <b>Items</b>        | <b>Code</b>   | <b>Description</b>                       | <b>Routing</b> |
|                     | 1   | Yes                                      |                |
|                     | 2   | No, but have definite plans to in future |                |
|                     | 3   | No, have no definite plans at present    |                |
|                     | 4   | DO NOT READ OUT – Don't know             |                |
| <b>Routing</b>      | E3a   |  |                |

### E3a

|                     |  |  |             |           |           |
|---------------------|--|--|-------------|-----------|-----------|
| <b>Condition</b>    | E2 contains [1,2,3,4,5,6,7,8,9,10,11,12,13,14,15]  |  |             |           |           |
| <b>Questiontype</b> | Single response  |  |             |           |           |
| <b>Text</b>         | <p>IF HAVE RECORDS (E2=1-13)</p> <p>Does your organisation ever analyse data to explore the gap between men and women on any of the following characteristics?</p> |  |             |           |           |
| <b>Items</b>        | <b>Code</b>  | <b>Description</b>   | <b>Yes</b>  | <b>No</b> | <b>DK</b> |
|                     | 1  | Starting salaries upon recruitment                                 | Routing E3D |           |           |
|                     | 2  | New salaries on promotion to a higher grade                        | E3D         |           |           |
|                     | 3  | Performance-related pay increases                                  | E3D         |           |           |
|                     | 4  | Any other employee characteristic for which you have data: SPECIFY | E3D         |           |           |
| <b>Routing</b>      | E4   |  |             |           |           |

### E3d

|                     |   |                                 |                      |
|---------------------|---|---------------------------------|----------------------|
| <b>Questiontype</b> | Single response   |                                 |                      |
| <b>Text</b>         | <p>ASK FOR EACH TYPE OF ANALYSIS IF E3A = YES</p> <p>How frequently do you run [INSERTTYPE OF ANALYSIS FROM E3-E3a] analysis?</p> <p>READ OUT CODE ONE ONLY</p> |                                 |                      |
| <b>Items</b>        | <b>Code</b>   | <b>Description</b>              | <b>Open category</b> |
|                     | 1   | Every month or two              |                      |
|                     | 2   | Quarterly                       |                      |
|                     | 3   | Twice per year                  |                      |
|                     | 4   | Annually                        |                      |
|                     | 5   | Less often                      |                      |
|                     | 6   | DO NOT READ OUT Other – SPECIFY | •                    |
|                     | 7   | DO NOT READ OUT – Don't know    |                      |
| <b>Routing</b>      | E4  |                                 |                      |



**E4**

|                     |  |   |                      |                  |
|---------------------|--|---|----------------------|------------------|
| <b>Condition</b>    | (((E3 = 1) or (E3a = YES)))  |   |                      |                  |
| <b>Questiontype</b> | Multiple response  |   |                      |                  |
| <b>Text</b>         | IF EITHER E3 TO E3e=1<br>Is this sort of information shared with staff through corporate communications at any of the following levels?<br>READ OUT, CODE ALL THAT APPLY |   |                      |                  |
| <b>Items</b>        | <b>Code</b>  | <b>Description</b>                        | <b>Open category</b> | <b>Exclusive</b> |
|                     | 1  | At board level                            |                      |                  |
|                     | 2  | To senior managers                        |                      |                  |
|                     | 3  | To line managers                          |                      |                  |
|                     | 4  | To all salaried staff                     |                      |                  |
|                     | 5  | To contractors and agency workers / temps |                      |                  |
|                     | 6  | Not communicated outside HR team          |                      |                  |
|                     | 7  | DO NOT READ OUT: Other (WRITE IN)         | •                    |                  |
|                     | 8  | DO NOT READ OUT: Don't know               |                      | •                |
| <b>Routing</b>      | E5   |   |                      |                  |

## E5

|                     |  |                    |
|---------------------|--|--------------------|
| <b>Questiontype</b> | Single response  |                    |
| <b>Text</b>         | Does your organisation collect any information on the proportion of mothers who return to work after taking maternity leave? |                    |
| <b>Items</b>        | <b>Code</b>  | <b>Description</b> |
|                     | 1  | Yes                |
|                     | 2  | No                 |
|                     | 3  | Don't know         |
| <b>Routing</b>      | E6   |                    |

## E6

|                     |  |                    |                |
|---------------------|--|--------------------|----------------|
| <b>Questiontype</b> | Single response                                |                    |                |
| <b>Text</b>         | Does your organisation conduct a staff survey? |                    |                |
| <b>Items</b>        | <b>Code</b>                                    | <b>Description</b> | <b>Routing</b> |
|                     | 1  | Yes                | E6a            |
|                     | 2  | No                 |                |
|                     | 3  | Don't know         |                |
| <b>Routing</b>      | F1   |                    |                |

## E6a

|                     |   |  |                  |
|---------------------|---|--|------------------|
| <b>Questiontype</b> | Multiple response   |  |                  |
| <b>Text</b>         | ASK IF E6=1<br>Does your staff survey ask about any of the following: |  |                  |
| <b>Items</b>        | <b>Code</b>   | <b>Description</b>   | <b>Exclusive</b> |
|                     | 1   | Employee satisfaction with pay?                                |                  |
|                     | 2   | Employee satisfaction with the opportunities to work flexibly? |                  |
|                     | 3   | Employees' perception of fair treatment at work?               |                  |
|                     | 4   | Employees' experience of discrimination?                       |                  |
|                     | 5   | Employees' experience of harassment?                           |                  |
|                     | 6   | None of the above  | •                |
| <b>Routing</b>      | E6B   |  |                  |

## E6B

|                     |   |                    |                |
|---------------------|---|--------------------|----------------|
| <b>Condition</b>    | (E6a contains [1,2,3,4,5]) or (E6 = 1)  |                    |                |
| <b>Questiontype</b> | Multiple response   |                    |                |
| <b>Text</b>         | Do you ever analyse the results of your staff survey by different diversity groups?<br>ASK IF E6=1 OR E6A=1-4 |                    |                |
| <b>Items</b>        | <b>Code</b>   | <b>Description</b> | <b>Routing</b> |
|                     | 1   | Yes                |                |
|                     | 2   | No                 | FI             |
|                     | 3   | Don't know         | FI             |
| <b>Routing</b>      | E6C   |                    |                |

## E6C

|                     |   |   |                      |                  |
|---------------------|---|---|----------------------|------------------|
| <b>Condition</b>    | (E6a contains [1,2,3,4,5]) or (E6B = 1)   |   |                      |                  |
| <b>Questiontype</b> | Multiple response   |   |                      |                  |
| <b>Text</b>         | Do you share the results of your staff survey with staff at any of the following levels?<br>READ OUT, CODE ALL THAT APPLY |   |                      |                  |
| <b>Items</b>        | <b>Code</b>   | <b>Description</b>                        | <b>Open category</b> | <b>Exclusive</b> |
|                     | 1   | At board level                            |                      |                  |
|                     | 2   | To senior managers                        |                      |                  |
|                     | 3   | To line managers                          |                      |                  |
|                     | 4   | To all salaried staff                     |                      |                  |
|                     | 5   | To contractors and agency workers / temps |                      |                  |
|                     | 6   | Not communicated outside HR team          |                      |                  |
|                     | 7   | DO NOT READ OUT: Other (WRITE IN)         | •                    |                  |
|                     | 8   | DO NOT READ OUT: Don't know               |                      | •                |
| <b>Routing</b>      | FI  |   |                      |                  |

## F1

|                     |  |                    |
|---------------------|--|--------------------|
| <b>Questiontype</b> | Single response  |                    |
| <b>Text</b>         | Section F: EQUAL PAY ACTIVITY<br><br>Is your organisation currently in the process of conducting a formal review to examine the gap between men's and women's pay? |                    |
| <b>Items</b>        | <b>Code</b>  | <b>Description</b> |
|                     | 1  | Yes                |
|                     | 2  | No                 |
|                     | 3  | Don't know         |
| <b>Routing</b>      | F2   |                    |

## F2

|                     |  |                    |                |
|---------------------|--|--------------------|----------------|
| <b>Questiontype</b> | Single response  |                    |                |
| <b>Text</b>         | Has your organisation ever conducted a formal review in the past to examine the gap between men's and women's pay?<br><br>INTERVIEWER NOTE: If organisation is in process of conducting its first EPR – then record as 'no'. |                    |                |
| <b>Items</b>        | <b>Code</b>  | <b>Description</b> | <b>Routing</b> |
|                     | 1  | Yes                | F2A            |
|                     | 2  | No                 |                |
|                     | 3  | Don't know         |                |
| <b>Routing</b>      | F3   |                    |                |

## F2A

|                     |  |                                |
|---------------------|--|--------------------------------|
| <b>Questiontype</b> | Single response  |                                |
| <b>Text</b>         | IF F2=1 ASK F2A<br><br>How frequently do you do formal reviews to examine the gap between men and women's pay? |                                |
| <b>Items</b>        | <b>Code</b>  | <b>Description</b>             |
|                     | 1  | Ad hoc                         |
|                     | 2  | Every year                     |
|                     | 3  | Every two years                |
|                     | 4  | Every three years              |
|                     | 5  | Every four to six years        |
|                     | 6  | Every seven to 10 years        |
|                     | 7  | Less often than every 10 years |
|                     | 8  | Don't know                     |
| <b>Routing</b>      | F3   |                                |

## F3

|                     |   |                    |
|---------------------|---|--------------------|
| <b>Condition</b>    | (f1 = 2) or (f1 = 3)  |                    |
| <b>Questiontype</b> | Single response   |                    |
| <b>Text</b>         | IF NOT IN PROCESS OF CONDUCTING AN EPR (F1=2 OR 3)<br>Does your organisation currently have any plans to conduct a review in the future to examine the gap between men's and women's pay? |                    |
| <b>Items</b>        | <b>Code</b>   | <b>Description</b> |
|                     | 1   | Yes                |
|                     | 2   | No                 |
|                     | 3   | Don't know         |
| <b>Routing</b>      | F4  |                    |

**F4**

|                     |  |   |                      |
|---------------------|--|---|----------------------|
| <b>Condition</b>    | ((f1 = 2) or (f1 = 3)) and (((f2 = 2) or (f2 = 3)) and ((f3 = 2) or (f3 = 3)))   |   |                      |
| <b>Questiontype</b> | Multiple response  |   |                      |
| <b>Text</b>         | <p>IF HAVE NOT CONDUCTED AN EPR, NOT CURRENTLY CONDUCTING ONE AND HAVE NO PLANS TO DO SO (F1=2-3 AND F2=2-3 AND F2=2-3) BUT NOT IF F1 AND F2 AND F3=3.</p> <p>Which of the following are reasons why your organisation has no plans to examine the gap between men’s and women’s pay? Is it because.....?</p> <p>READ OUT AND CODE ALL MENTIONED</p> |   |                      |
| <b>Items</b>        | <b>Code</b>  | <b>Description</b>  | <b>Open category</b> |
|                     | 1  | You consider you already provide equal pay                                |                      |
|                     | 2  | You have an analytical job evaluation system                              |                      |
|                     | 3  | You do not have time to do so   |                      |
|                     | 4  | You are implementing or planning to implement a new pay or grading system |                      |
|                     | 5  | You do not have the financial or other resources to do so                 |                      |
|                     | 6  | You have concerns about what you would find                               |                      |
|                     | 7  | Other (SPECIFY)   | •                    |
| <b>Routing</b>      | F5   |   |                      |

**F5**

|                     |  |                    |  |
|---------------------|--|--------------------|--|
| <b>Questiontype</b> | Single response  |                    |  |
| <b>Text</b>         | Has your organisation been presented with an Equal Pay Questionnaire by any of your employees? |                    |  |
| <b>Items</b>        | <b>Code</b>  | <b>Description</b> |  |
|                     | 1  | Yes                |  |
|                     | 2  | No                 |  |
|                     | 3  | Don’t know         |  |
| <b>Routing</b>      | F6   |                    |  |

**F6**

|                     |   |                    |
|---------------------|---|--------------------|
| <b>Questiontype</b> | Single response   |                    |
| <b>Text</b>         | Has your organisation ever had equal pay claims filed against it? |                    |
| <b>Items</b>        | <b>Code</b>   | <b>Description</b> |
|                     | 1   | Yes – in the past  |
|                     | 2   | Yes – currently    |
|                     | 3   | No                 |
|                     | 4   | Don't Know         |
| <b>Routing</b>      | F7  |                    |

## F7

|                     |  |  |                      |                  |
|---------------------|--|--|----------------------|------------------|
| <b>Condition</b>    | ((f1 = 2) or (f1 = 3)) and (((f2 = 2) or (f2 = 3)) and ((f3 = 2) or (f3 = 3)))   |  |                      |                  |
| <b>Questiontype</b> | Multiple response  |  |                      |                  |
| <b>Text</b>         | <p>IF HAVE NOT CONDUCTED AN EPR, NOT CURRENTLY CONDUCTING ONE AND HAVE NO PLANS TO DO SO (F1=2-3 AND F2=2-3 AND F2=2-3)</p> <p>What would prompt your organisation to examine the gap between men's and women's pay?<br/>           PROBE: Anything else? PROBE FULLY. DO NOT PROMPT. CODE ALL THAT APPLY.</p> |  |                      |                  |
| <b>Items</b>        | <b>Code</b>  | <b>Description</b>   | <b>Open category</b> | <b>Exclusive</b> |
|                     | 1  | You would have to do so in order to comply with legislation                |                      |                  |
|                     | 2  | You want to be a good practice employer                                    |                      |                  |
|                     | 3  | As a result of leadership from employer bodies                             |                      |                  |
|                     | 4  | You see it as good business sense  |                      |                  |
|                     | 5  | You were responding to a request from trade unions                         |                      |                  |
|                     | 6  | As a result of Government policy or publicity                              |                      |                  |
|                     | 7  | As a result of equal pay cases being raised in your organisation or sector |                      |                  |
|                     | 8  | As a result of EHRC policy or publicity                                    |                      |                  |
|                     | 9  | As a result of one or more employees making a complaint or taking action   |                      |                  |
|                     | 10   | For other reasons (SPECIFY)  | •                    |                  |
|                     | 11   | Not applicable – we already have equal pay                                 | ROUTE TO GI          |                  |
|                     | 12   | Don't know   |                      | •                |
| <b>Routing</b>      | F7count  |  |                      |                  |

## F8

|                     |  |
|---------------------|--|
| <b>Condition</b>    | F7cnt > 1  |
| <b>Questiontype</b> | Single response  |
| <b>Text</b>         | <p>ASK ALL WHO MENTION MORE THAN ONE REASON AT F7</p> <p>And which of these would you describe as being the one thing which would have the most impact in prompting you to examine the difference between men's and women's pay?</p> <p>READ OUT ALL MENTIONED AT F7 AND CODE ONE ONLY</p> |
| <b>Routing</b>      | F9   |



**F9**

|                     |   |   |                      |                  |
|---------------------|---|---|----------------------|------------------|
| <b>Condition</b>    | ((f1 = 2) or (f1 = 3)) and (((f2 = 2) or (f2 = 3)) and ((f3 = 2) or (f3 = 3)))  |   |                      |                  |
| <b>Questiontype</b> | Multiple response   |   |                      |                  |
| <b>Text</b>         | IF HAVE NOT LOOKED INTO THE GENDER PAY GAP (F1=2-3 AND F2=2-3 AND F2=2-3)<br>What support would you need to encourage you to measure the gap between men's and women's pay?<br>DO NOT READ OUT; CODE ALL THAT APPLY |   |                      |                  |
| <b>Items</b>        | <b>Code</b>   | <b>Description</b>                              | <b>Open category</b> | <b>Exclusive</b> |
|                     | 1   | A website with advice on how to measure the gap |                      |                  |
|                     | 2   | Help-line advice                                |                      |                  |
|                     | 3   | Hard copy written materials to aid you          |                      |                  |
|                     | 4   | External consultancy advice                     |                      |                  |
|                     | 5   | Having extra internal resources                 |                      |                  |
|                     | 7   | Other (SPECIFY)                                 | •                    |                  |
|                     | 6   | Would not need any support                      |                      | •                |
|                     | 8   | DO NOT READ OUT – Don't know                    |                      | •                |
| <b>Routing</b>      | F10   |   |                      |                  |

## F10

|                     |   |   |                      |                  |
|---------------------|---|---|----------------------|------------------|
| <b>Condition</b>    | F9 contains [1,2,3,4,5,7]   |   |                      |                  |
| <b>Questiontype</b> | Multiple response   |   |                      |                  |
| <b>Text</b>         | <p>IF WOULD LIKE SUPPORT (F9&lt;&gt;6)</p> <p>Where would you or do you go for support to help you measure the difference between men's and women's pay?</p> <p>READ OUT; CODE ALL THAT APPLY</p> |   |                      |                  |
| <b>Items</b>        | <b>Code</b>   | <b>Description</b>  | <b>Open category</b> | <b>Exclusive</b> |
|                     | 1   | ACAS (Advisory, Conciliation and Arbitration Service)       |                      |                  |
|                     | 2   | BIS (Dept for Business, Innovation and Skills) / BERR / DTI |                      |                  |
|                     | 3   | CIPD (Chartered Institute of Personnel and Development)     |                      |                  |
|                     | 4   | EHRC (Equality and Human Rights Commission)                 |                      |                  |
|                     | 5   | GEO (Government Equalities Office)                          |                      |                  |
|                     | 6   | Trade association / industry body                           |                      |                  |
|                     | 7   | Business association  |                      |                  |
|                     | 8   | External consultancy  |                      |                  |
|                     | 10  | Other (SPECIFY)   | •                    |                  |
|                     | 9   | No support required   |                      | •                |
|                     | 11  | DO NOT READ OUT – Don't know                                |                      | •                |
| <b>Routing</b>      | G1  |   |                      |                  |

## G1

|                     |  |                              |
|---------------------|--|------------------------------|
| <b>Questiontype</b> | Single response  |                              |
| <b>Text</b>         | <p>Section G – DATA REPORTING AND FUTURE PLANS</p> <p>I'd now like to explore the actions taken to ensure equality between men and women in your organisation.</p> <p>Does your organisation have an Equal Opportunities and/or Diversity Statement?</p> |                              |
| <b>Items</b>        | <b>Code</b>  | <b>Description</b>           |
|                     | 1  | both equal opp and diversity |
|                     | 2  | Equal Opp statement          |
|                     | 3  | Diversity statement          |
|                     | 4  | No, neither                  |
| <b>Routing</b>      | G2   |                              |

## G2

|                     |  |                          |                      |
|---------------------|--|--------------------------|----------------------|
| <b>Condition</b>    | (g1 = 1) or ((g1 = 2) or (g1 = 3))   |                          |                      |
| <b>Questiontype</b> | Single response  |                          |                      |
| <b>Text</b>         | <p>IF G1= 1, 2,3</p> <p>Are/Is the &lt;%~G1%&gt; published externally ie on company website/annual report?</p> |                          |                      |
| <b>Items</b>        | <b>Code</b>  | <b>Description</b>       | <b>Condition</b>     |
|                     | 1  | Yes, both                | g1 = 1               |
|                     | 2  | Yes Equal Opp Statement  | (g1 = 1) or (g1 = 2) |
|                     | 3  | Yes, Diversity Statement | (g1 = 1) or (g1 = 3) |
|                     | 4  | No                       |                      |
|                     | 5  | Don't know               |                      |
| <b>Routing</b>      | G7   |                          |                      |

## G7

|                     |   |                              |
|---------------------|---|------------------------------|
| <b>Questiontype</b> | Single response   |                              |
| <b>Text</b>         | How much of a business priority is it in your organisation to ensure diversity in your workforce?<br>READ OUT |                              |
| <b>Items</b>        | <b>Code</b>   | <b>Description</b>           |
|                     | 1   | Very high priority           |
|                     | 2   | Fairly high priority         |
|                     | 3   | Fairly low priority          |
|                     | 4   | Very low priority            |
|                     | 5   | Not a priority at all        |
|                     | 6   | DO NOT READ OUT – Don't know |
| <b>Routing</b>      | G8  |                              |

## G8

|                     |  |   |
|---------------------|--|---|
| <b>Questiontype</b> | Single response  |   |
| <b>Text</b>         | Does your organisation have a planned approach for increasing diversity in your workforce? |   |
| <b>Items</b>        | <b>Code</b>  | <b>Description</b>  |
|                     | 1  | Yes   |
|                     | 2  | No, not a planned approach but are informally looking into it |
|                     | 3  | No, not at all  |
|                     | 4  | DO NOT READ OUT – Don't know                                  |
| <b>Routing</b>      | G8a  |   |

## G8a

|                     |   |                              |                      |                  |
|---------------------|---|------------------------------|----------------------|------------------|
| <b>Condition</b>    | g8 = 1  |                              |                      |                  |
| <b>Questiontype</b> | Multiple response   |                              |                      |                  |
| <b>Text</b>         | IF G8=1 Does this planned approach detail how greater diversity across the organisation will be achieved...?<br>READ OUT; CODE ALL THAT APPLY |                              |                      |                  |
| <b>Items</b>        | <b>Code</b>   | <b>Description</b>           | <b>Open category</b> | <b>Exclusive</b> |
|                     | 1   | At the overall level         |                      |                  |
|                     | 2   | At departmental levels       |                      |                  |
|                     | 3   | By job role                  |                      |                  |
|                     | 4   | Other (SPECIFY)              | •                    |                  |
|                     | 5   | DO NOT READ OUT – Don't know |                      | •                |
| <b>Routing</b>      | G3  |                              |                      |                  |

## G3

|                     |  |                                   |  |  |
|---------------------|--|-----------------------------------|--|--|
| <b>Questiontype</b> | Single response  |                                   |  |  |
| <b>Text</b>         | How much of a business priority is it in your organisation to ensure that there is no gap between men's and women's pay?<br>READ OUT |                                   |  |  |
| <b>Items</b>        | <b>Code</b>  | <b>Description</b>                |  |  |
|                     | 1  | Very high priority ROUTE TO G4    |  |  |
|                     | 2  | Fairly high priority ROUTE TO G4  |  |  |
|                     | 3  | Fairly low priority ROUTE TO G5   |  |  |
|                     | 4  | Very low priority ROUTE TO G5     |  |  |
|                     | 5  | Not a priority at all ROUTE TO G5 |  |  |
|                     | 6  | DO NOT READ OUT – Don't know      |  |  |
| <b>Routing</b>      | G4   |                                   |  |  |

## G4

|                     |  |   |                |
|---------------------|--|---|----------------|
| <b>Questiontype</b> | Single response  |   |                |
| <b>Text</b>         | Does your organisation have a planned approach for reducing the gap between men's and women's pay? |   |                |
| <b>Items</b>        | <b>Code</b>  | <b>Description</b>  | <b>Routing</b> |
|                     | 1  | Yes   | G4a            |
|                     | 2  | No, not a planned approach but are informally looking into it |                |
|                     | 3  | No, not at all  |                |
|                     | 4  | DO NOT READ OUT – Don't know                                  |                |
| <b>Routing</b>      | G5   |   |                |

## G4a

|                     |   |                              |                      |                  |
|---------------------|---|------------------------------|----------------------|------------------|
| <b>Questiontype</b> | Multiple response   |                              |                      |                  |
| <b>Text</b>         | IFYES (G4=1)<br>Does this planned approach detail how the pay gap between men and women will be closed...?<br>READ OUT; CODE ALL THAT APPLY |                              |                      |                  |
| <b>Items</b>        | <b>Code</b>   | <b>Description</b>           | <b>Open category</b> | <b>Exclusive</b> |
|                     | 1   | At the overall level         |                      |                  |
|                     | 2   | At departmental levels       |                      |                  |
|                     | 3   | By job role                  |                      |                  |
|                     | 4   | Other (SPECIFY)              | •                    |                  |
|                     | 5   | DO NOT READ OUT – Don't know |                      | •                |
| <b>Routing</b>      | G5  |                              |                      |                  |

**G5**

|                     |   |                                |                |
|---------------------|---|--------------------------------|----------------|
| <b>Condition</b>    | (f1 = 1) or (f2 = 1)  |                                |                |
| <b>Questiontype</b> | Single response   |                                |                |
| <b>Text</b>         | <p>IF HAVE DONE REVIEW (F1=1 or F2=1)</p> <p>Do you currently or have you ever report/ed or publish/ed an analysis of differences between men's and women's pay INTERNALLY, that is, within your organisation? (for example, on the company intranet or staff handbook) AND/OR EXTERNALLY, that is, outside of your organisation (for example on the company website or annual report?)</p> |                                |                |
| <b>Items</b>        | <b>Code</b>   | <b>Description</b>             | <b>Routing</b> |
|                     | 1   | Yes, Internally                | G10            |
|                     | 2   | Yes, externally                |                |
|                     | 3   | Yes, internally and externally |                |
|                     | 4   | No, neither                    |                |
|                     | 5   | Don't know                     |                |
| <b>Routing</b>      | G6  |                                |                |

**G6**

|                     |   |  |  |
|---------------------|---|--|--|
| <b>Condition</b>    | (f1 = 2) or ((f1 = 3) or ((f2 = 2) or (f2 = 3)))  |  |  |
| <b>Questiontype</b> | Single response   |  |  |
| <b>Text</b>         | <p>IF HAVE NOT DONE REVIEW OR DO NOT PUBLISH INTERNALLY ((F1/F2=2-3) OR G5=2,4)</p> <p>How open are you to the idea of reporting on the gap between men's and women's pay INTERNALLY, that is within your organisation?</p> <p>READ OUT</p> |  |  |
| <b>Items</b>        | <b>Code</b>   | <b>Description</b>                               |  |
|                     | 1   | Would be open to it                              |  |
|                     | 2   | Would be indifferent to it                       |  |
|                     | 3   | Would be against it                              |  |
|                     | 4   | DO NOT READ OUT – It would depend on the figures |  |
|                     | 5   | DO NOT READ OUT – Don't know                     |  |
| <b>Routing</b>      | G12   |  |  |

## G12

|                     |  |  |  |
|---------------------|--|--|--|
| <b>Condition</b>    | (f1 = 2) or ((f1 = 3) or ((f2 = 2) or (f2 = 3)))AND G5=1,4   |  |  |
| <b>Questiontype</b> | Single response  |  |  |
| <b>Text</b>         | And how open are you to the idea of reporting on the gap between men's and women's pay EXTERNALLY, that is outside of your organisation?<br>READ OUT |  |  |
| <b>Items</b>        | <b>Code</b>  | <b>Description</b>                               |  |
|                     | 1  | Would be open to it                              |  |
|                     | 2  | Would be indifferent to it                       |  |
|                     | 3  | Would be against it                              |  |
|                     | 4  | DO NOT READ OUT – It would depend on the figures |  |
|                     | 5  | DO NOT READ OUT – Don't know                     |  |
| <b>Routing</b>      | G13  |  |  |

## G9

|                     |  |  |                      |                  |
|---------------------|--|--|----------------------|------------------|
| <b>Condition</b>    | g6 = 3   |  |                      |                  |
| <b>Questiontype</b> | Multiple response  |  |                      |                  |
| <b>Text</b>         | IF AGAINST IT (G6=3)<br>Why are you against the idea of reporting on the gap between men's and women's pay internally?<br>DO NOT READ OUT. PROBE FULLY. CODE AS MANY AS APPLY. |  |                      |                  |
| <b>Items</b>        | <b>Code</b>  | <b>Description</b>                                   | <b>Open category</b> | <b>Exclusive</b> |
|                     | 1  | Company policy is not to discuss pay                 |                      |                  |
|                     | 2  | Worries / concerns about uncovering problems         |                      |                  |
|                     | 3  | Previous negative experience of reporting internally |                      |                  |
|                     | 4  | Not sure how to do this in the right way             |                      |                  |
|                     | 5  | Don't see gender pay gaps as an issue to address     |                      |                  |
|                     | 6  | Do not have the resource or manpower to do this      |                      |                  |
|                     | 7  | Other (SPECIFY)                                      | •                    |                  |
|                     | 8  | DO NOT READ OUT – Don't know                         |                      | •                |
| <b>Routing</b>      | G10  |  |                      |                  |



## G13

|                     |  |  |                      |                  |
|---------------------|--|--|----------------------|------------------|
| <b>Condition</b>    | g12 = 3  |  |                      |                  |
| <b>Questiontype</b> | Multiple response  |  |                      |                  |
| <b>Text</b>         | IF AGAINST IT (G12=2 OR G12=3)<br>Why are you against the idea of reporting on the gap between men's and women's pay externally?<br>DO NOT READ OUT. PROBE FULLY. CODE AS MANY AS APPLY. |  |                      |                  |
| <b>Items</b>        | <b>Code</b>  | <b>Description</b>                                   | <b>Open category</b> | <b>Exclusive</b> |
|                     | 1  | Company policy is not to discuss pay                 |                      |                  |
|                     | 2  | Worries / concerns about uncovering problems         |                      |                  |
|                     | 3  | Previous negative experience of reporting externally |                      |                  |
|                     | 4  | Not sure how to do this in the right way             |                      |                  |
|                     | 5  | Don't see gender pay gaps as an issue to address     |                      |                  |
|                     | 6  | Do not have the resource or manpower to do this      |                      |                  |
|                     | 7  | Other (SPECIFY)                                      | •                    |                  |
|                     | 8  | DO NOT READ OUT – Don't know                         |                      | •                |
| <b>Routing</b>      | G14  |  |                      |                  |

## G10

|                     |   |  |                      |                  |
|---------------------|---|--|----------------------|------------------|
| <b>Condition</b>    | (g5 = 1) or (g6 = 1)  |  |                      |                  |
| <b>Questiontype</b> | Multiple response   |  |                      |                  |
| <b>Text</b>         | IF FOR IT (G5=1 OR G6=1)<br>Why are you positive about reporting on the gap between men's and women's pay internally?<br>DO NOT READ OUT. PROBE FULLY. CODE AS MANY AS APPLY. |  |                      |                  |
| <b>Items</b>        | <b>Code</b>   | <b>Description</b>                               | <b>Open category</b> | <b>Exclusive</b> |
|                     | 1   | Confident we have no pay gap, so nothing to hide |                      |                  |
|                     | 2   | Company culture is to be transparent / fair      |                      |                  |
|                     | 3   | Previous positive experience                     |                      |                  |
|                     | 4   | Other (SPECIFY)                                  | •                    |                  |
|                     | 5   | DO NOT READ OUT – Don't know                     |                      | •                |
| <b>Routing</b>      | G11   |  |                      |                  |

**G14**

|                     |   |  |                      |                  |
|---------------------|---|--|----------------------|------------------|
| <b>Condition</b>    | (g5 = 2) OR (G5=3) or (g12 = 1)   |  |                      |                  |
| <b>Questiontype</b> | Multiple response   |  |                      |                  |
| <b>Text</b>         | IF FOR IT (G12=1)<br>Why are you positive about reporting on the gap between men's and women's pay externally?<br>DO NOT READ OUT. PROBE FULLY. |  |                      |                  |
| <b>Items</b>        | <b>Code</b>   | <b>Description</b>                               | <b>Open category</b> | <b>Exclusive</b> |
|                     | 1   | Confident we have no pay gap, so nothing to hide |                      |                  |
|                     | 2   | Company culture is to be transparent / fair      |                      |                  |
|                     | 4   | Gained positive experience from reporting        |                      |                  |
|                     | 5   | Other (SPECIFY)                                  | •                    |                  |
|                     | 6   | DO NOT READ OUT – Don't know                     |                      | •                |
| <b>Routing</b>      | G15   |  |                      |                  |

## G11

|                     |   |  |                      |                   |                   |
|---------------------|---|--|----------------------|-------------------|-------------------|
| <b>Questiontype</b> | Multiple response   |  |                      |                   |                   |
| <b>Text</b>         | Do you report any of the following internally AND/OR externally?<br>(INTERVIEWER TO DETERMINE BETWEEN INTERNAL AND EXTERNAL)<br>READ OUT; CODE ALL THAT APPLY |  |                      |                   |                   |
| <b>Items</b>        | <b>Code</b>   | <b>Description</b>   | <b>Open category</b> | <b>Internally</b> | <b>Externally</b> |
|                     | 1   | One single figure of the average difference overall between genders                                      |                      |                   |                   |
|                     | 2   | Pay gap figures broken down by part time and full time workers   |                      |                   |                   |
|                     | 3   | Pay gap figures broken down by job role or pay grade   |                      |                   |                   |
|                     | 4   | Pay gap figures by formal job evaluation scale   |                      |                   |                   |
|                     | 5   | Full equal pay audit   |                      |                   |                   |
|                     | 6   | A written account explaining any differences or actions being taken to address them                      |                      |                   |                   |
|                     | 8   | Difference between men and women's starting salaries   |                      |                   |                   |
|                     | 9   | Results from a staff survey  |                      |                   |                   |
|                     | 10  | Composition of the workforce (ie gender, ethnicity, race, age)   |                      |                   |                   |
|                     | 11  | Promotion rates by gender  |                      |                   |                   |
|                     | 12  | Gender uptake of flexible working across the organisation  |                      |                   |                   |
|                     | 13  | Number of maternity returnees  |                      |                   |                   |
|                     | 14  | Men and women's representation within the organisation ie, by occupational group; levels or salary bands |                      |                   |                   |
|                     | 15  | -  |                      |                   |                   |
|                     | 16  | -  |                      |                   |                   |
|                     | 17  | Difference between men and women's reward components at different levels in the organisation             |                      |                   |                   |
|                     | 18  | Other (SPECIFY)  |                      | •                 |                   |
|                     | 19  | DO NOT READ OUT – Don't know   |                      |                   |                   |
| <b>Routing</b>      | G11a  |  |                      |                   |                   |

## G15

|                     |  |                              |                      |
|---------------------|--|------------------------------|----------------------|
| <b>Condition</b>    | g11A = 1   |                              |                      |
| <b>Questiontype</b> | Single response  |                              |                      |
| <b>Text</b>         | IF G11=1<br>Have you seen any negative effects from reporting your gap between men's and women's pay externally? |                              |                      |
| <b>Items</b>        | <b>Code</b>  | <b>Description</b>           | <b>Open category</b> |
|                     | 1  | Yes (SPECIFY)                | •                    |
|                     | 2  | No                           |                      |
|                     | 3  | DO NOT READ OUT – Don't know |                      |
| <b>Routing</b>      | G16  |                              |                      |

## G16

|                     |   |                              |                      |                  |
|---------------------|---|------------------------------|----------------------|------------------|
| <b>Condition</b>    | g11A = 1  |                              |                      |                  |
| <b>Questiontype</b> | Multiple response   |                              |                      |                  |
| <b>Text</b>         | IF REPORT ON EQUAL PAY (G11=1)<br>How do you report externally on the gap between men's and women's pay within your organisation?<br>DO NOT READ OUT. PROBE FULLY. CODE AS MANY AS APPLY. |                              |                      |                  |
| <b>Items</b>        | <b>Code</b>   | <b>Description</b>           | <b>Open category</b> | <b>Exclusive</b> |
|                     | 1   | On our website               |                      |                  |
|                     | 2   | In our annual report         |                      |                  |
|                     | 3   | Other (SPECIFY)              | •                    |                  |
|                     | 4   | DO NOT READ OUT – Don't know |                      | •                |
| <b>Routing</b>      | G17   |                              |                      |                  |

## G17

|                     |   |                    |
|---------------------|---|--------------------|
| <b>Condition</b>    | G16 contains [1,2,3]  |                    |
| <b>Questiontype</b> | Open ended  |                    |
| <b>Text</b>         | ASK IF G16=1,2,3<br><br>Could you provide details on how we could view your report? |                    |
| <b>Items</b>        | <b>Code</b>   | <b>Description</b> |
| <b>Properties</b>   | <b>Property</b>   | <b>Value</b>       |
|                     | Textlines   | 3                  |
| <b>Routing</b>      | G18   |                    |

## G21

|                     |  |   |
|---------------------|--|---|
| <b>Condition</b>    | (G11a is not asked) or ((G11a = 2) or (G11a = 3))  |   |
| <b>Questiontype</b> | Items popup  |   |
| <b>Text</b>         | ASK IF DO NOT REPORT EXTERNALLY ((F1=2-3 AND F2=2-3 AND F2=2-3) OR G11=2-3)<br>To what extent do you agree or disagree that the following would encourage you to report EXTERNALLY on any gap between men's and women's pay within your organisation?<br>READ OUT EACH STATEMENT. READ OUT SCALE AND REPEAT AS NECESSARY |   |
| <b>Items</b>        | <b>Code</b>  | <b>Description</b>                                      |
|                     | 1  | Advice on how to report clearly                         |
|                     | 2  | Competitors doing the same                              |
|                     | 3  | Being able to report with an explanation of the figures |
|                     | 4  | If an employee took action or complained                |
| <b>Labels</b>       | <b>Code</b>  | <b>Description</b>                                      |
|                     | 1  | Strongly agree  |
|                     | 2  | Agree   |
|                     | 3  | Neither agree nor disagreed                             |
|                     | 4  | Disagree  |
|                     | 5  | Strongly disagreed                                      |
|                     | 6  | DO NOT READ OUT: Don't know                             |
| <b>Routing</b>      | G22  |   |

## G22

|                     |  |                    |
|---------------------|--|--------------------|
| <b>Condition</b>    | (g2l_1 = 3) or ((g2l_1 = 4) or ((g2l_1 = 5) or ((g2l_1 = 6) or ((g2l_2 = 3) or ((g2l_2 = 4) or ((g2l_2 = 5) or ((g2l_2 = 6) or ((g2l_3 = 3) or ((g2l_3 = 4) or ((g2l_3 = 5) or ((g2l_3 = 6) or ((g2l_4 = 3) or ((g2l_4 = 4) or ((g2l_4 = 5) or (g2l_4 = 6)   |                    |
| <b>Questiontype</b> | Open ended   |                    |
| <b>Text</b>         | <p>ASK IF DISAGREE OR NONCOMMITTAL TO EVERY STATEMENT ((G2I(1)=3-6) AND (G2I(2)=3-6) AND (G2I(3)=3-6) AND (G2I(4)=3-6))</p> <p>What, if anything, WOULD encourage you to report EXTERNALLY on the gap between men's and women's pay within your organisation?</p> <p>PROBE FULLY. RECORD VERBATIM:OR SINGLE CODE:Nothing – we would only report externally if required to by law</p> |                    |
| <b>Items</b>        | <b>Code</b>  | <b>Description</b> |
| <b>Routing</b>      | G23  |                    |

## G23

|                     |   |                    |
|---------------------|---|--------------------|
| <b>Questiontype</b> | Single response   |                    |
| <b>Text</b>         | <p>ASK ALLThank you, that concludes the questions I have for you.</p> <p>Occasionally, it is necessary to call people back to clarify information or answers to questions. May we call you back if required?</p> <p>REASSURE IF NECESSARY:We would only re-contact you with regards to this survey.Your details will not be used for any other purpose.</p> |                    |
| <b>Items</b>        | <b>Code</b>   | <b>Description</b> |
|                     | 1   | Yes                |
|                     | 2   | No                 |
| <b>Routing</b>      | G23A  |                    |

## G23A

|                     |  |                    |
|---------------------|--|--------------------|
| <b>Questiontype</b> | Single response  |                    |
| <b>Text</b>         | GEO is working with the Institute for Employment Studies (IES) to conduct further research in this area.<br><br>Would you be prepared to answer further questions about future practice in measuring the gender pay gap? |                    |
| <b>Items</b>        | <b>Code</b>  | <b>Description</b> |
|                     | 1  | Yes                |
|                     | 2  | No                 |
| <b>Routing</b>      | G23B   |                    |

## G23B

|                     |   |                    |
|---------------------|---|--------------------|
| <b>Condition</b>    | g23a = 1  |                    |
| <b>Questiontype</b> | Single response   |                    |
| <b>Text</b>         | IF G23A=1<br>May we pass on your contact details to the Institute for Employment Studies (IES) for this purpose?<br>REASSURE IF NECESSARY:Your details would NOT be sent to GEO or be linked to the survey results in any way.<br>Your details would ONLY be used by IES for the purposes of this specific follow up project, and not for any other reason.You would still be able to decline to take part in the research if called. |                    |
| <b>Items</b>        | <b>Code</b>   | <b>Description</b> |
|                     | 1   | Yes                |
|                     | 2   | No                 |
| <b>Routing</b>      | G24   |                    |

## G24

|                     |   |                    |
|---------------------|---|--------------------|
| <b>Condition</b>    | g23b = 1                                      |                    |
| <b>Questiontype</b> | Text  |                    |
| <b>Text</b>         | IF G23B=1<br>Can I just confirm your details? |                    |
| <b>Items</b>        | <b>Code</b>                                   | <b>Description</b> |
|                     | 1   | NAME:              |
|                     | 2   | TELEPHONE:         |
|                     | 3   | COMPANY NAME:      |
| <b>Properties</b>   | <b>Property</b>                               | <b>Value</b>       |
|                     | Minimum length                                | 0                  |
|                     | Maximum length                                | 300                |
|                     | Input width                                   | 100                |
| <b>Routing</b>      | lastone                                       |                    |

## lastone

|                     |  |                    |
|---------------------|--|--------------------|
| <b>Questiontype</b> | Open ended   |                    |
| <b>Text</b>         | That's the end of the questionnaire. Thank you for your time. Do you have any more comments. |                    |
| <b>Items</b>        | <b>Code</b>  | <b>Description</b> |



# Annex 2: Discussion Guides

## Employers that do not analyse data

### Introductory questions

- Can you tell me about your role in the organisation? How is HR organised/approached within your organisation? (INTERVIEWER to probe on whether HR is respondent's main role, size of HR team, whether all HR functions are based at this site or devolved/central).
- How, if at all, would the achievement of equal pay support your business objectives?
- [If not covered in answer to above question] How important is the achievement of equal pay for your organisation? Why?

### Section A – Collecting sufficient data

INTERVIEWER: We understand that you do not collect data on differences in equality and diversity in your organisation; is that right?

- [If correct] What are your reasons for not collecting this data, what are the barriers to collection?
- Do you have any plans to collect this type of data in future?

### Section B – Extent of analysis and reporting

- What knowledge and/or skills and resources do you think are required to accurately measure the gender pay gap? Do you have these expertise and resources internally?
- If you were to begin reporting internally on the gender pay gap, would you resource this task internally or would you seek the assistance of an external party? Please provide a reason for your answer.

### Section C – Sharing info internally

- Which measures might your organisation consider in order to voluntarily report on gender pay gaps or workforce equality? Why?

Probe with the following:

- a written account of gender pay which puts any gap into context and explains the reasons any disparities
- data showing men and women's representation at different levels in the organisation
- data on total pay differences between men and women; starting salaries, performance related pay
- full-time and part-time and overall gender pay gaps?

(INTERVIEWER: Probe on these additional measures if respondent is confident in understanding the different measures: data showing promotions in a year broken down by gender, data showing the uptake of flexible working; data concerning maternity returnees.)

- Would you ever consider reporting findings of men and women’s representation at different levels and/or the gender pay gap:
  - internally to the Board and/or management team
  - reporting internally to staff
  - reporting externally? Please give reasons for your answers.
- What would be different in your approach when reporting internally or externally? Why?

### **Section D – Sharing info externally**

- Do you think yours and other companies should voluntarily publish information on gender pay externally? Why do you hold this view?
- Do you know of other organisations in your sector who conduct this analysis? If yes, why do you think they do this?
- Would you find being able to compare pay gap and diversity data with other organisations in your sector/similar sized organisations useful? Interesting? Reasons for answer.
- What do you perceive to be the costs of having greater transparency and wide availability of information on equality for:
  - your organisation
  - your sector.
- What do you perceive to be the benefits of having greater transparency and wide availability of equality information for:
  - your organisation
  - your sector
  - society.

### **Section E – Action, changes and outcomes**

- What actions, if any, have you taken to address workforce diversity in your organisation? How effective have these been?
  - If not, do you have any planned actions or activity in the future?
- Do you/ your organisation believe a pay gap in an organisation is something that should be addressed? Please provide a reason for your answer. If not, why not?

### **Section F – General opinions on voluntary gender equality reporting**

- What would encourage you to voluntarily report gender pay gap, participation of men and women at different levels in your organisation and other equality data?
  - What support would you need to do this?

- It has been suggested that, where organisations are going to make public information about pay gaps or equality in their organisation, it would be useful to include additional information alongside it that provides a context. If your organisation was going to make this information public, which of the following would you use:  
(prompts)
  - information on the organisation, its business and HR strategy, etc
  - information on the sector/external environment eg skills, demand etc
  - Explanation of any gender pay gaps revealed
  - Information on initiatives to address any gender pay gaps highlighted
  - Wider diversity and human capital information eg male/female ratios, take up of training by gender, etc
- Finally, is there anything else you would like to say on this topic?  
Thanks and close.

## Employers that analyse but do not publish data

### Introductory questions

- Can you tell me about your role in the organisation? How is HR organised/approached within your organisation? (INTERVIEWER to probe on whether HR is respondent's main role, size of HR team, whether all HR functions are based at this site or devolved/central)
- How, if at all, would the achievement of equal pay support your business objectives?
- [If not covered in answer to above question] How important is the achievement of equal pay for your organisation? Why?

### Section A – Collecting sufficient data

INTERVIEWER: I understand you collect data and look at the difference between men and women's pay (the gender pay gap) in your organisation. Is that right?

- If yes, what data do you collect? How often? How?
- Does your organisation also collect reliable data on (if not mentioned above):
  - the numbers of men and women promoted each year?
  - the uptake of flexible working arrangements, such as flexi-time, job shares, home working, term-time working, zero hours contracts, annualised hours?
  - the components of total pay for individual employees, ie overtime, bonuses, shift pay?
  - maternity leavers (number on leave, number returning, number staying with organisation)?

## **Section B – Extent of analysis and reporting**

- Who conducts the gender pay analysis in your organisation, for example, HR, Finance, Department Heads? How often is it done? When did you start? Why?
- Who requested gender pay analysis to be done in your organisation and was there an underlying reason for this?
- What measure do you use to analyse differences between men and women's pay? ie single figure, full-time, part-time, by job grade etc.
- [If conducts analysis of gender pay with more than one measure] Which of the measures you use is most important to your organisation and why?
- What overall difficulties do you experience when conducting the analysis?
- What informed your decision on how to conduct the analysis, for example, the data available, the methods of similar organisations, guidance, other standards? probe answers given around guidance and standards
- [If has individual performance related bonuses] Has your organisation ever explored the differences between genders in performance bonus payouts? If yes, what did it show? If not, is it something you would consider doing? Probe
- Do you conduct any analysis around maternity returnees? If yes, what do you analyse?
- What do you think are the causes of any pay gap in your organisation?

## **Section C – Sharing info internally**

- Do you report analysis findings internally to staff? [Yes, ASK Q.16] [No, ASK Q.17]
- How do you report information about the gender pay gap within your organisation to staff? (ie what data was given, how was it shared ie on Intranet etc)? To all or specific staff? What was their response?
- If haven't reported internally, why do you not report this information internally? Have you ever considered it, but ultimately decided against sharing it? What was this decision based on?
- Which measures might your organisation consider in order to voluntarily report on gender pay gaps or workforce equality? Why?

Probe with the following:

- A written account of gender pay which puts any gap into context and explains the reasons for any disparities
- Data showing men and women's representation at different levels in the organisation,
- Data on total pay differences between men and women; starting salaries, performance related pay
- Full-time and part-time and overall gender pay gaps?

(INTERVIEWER: Probe on these additional measures if respondent is confident in understanding the different measures: data showing promotions in a year broken down by gender; data showing the uptake of flexible working; data concerning maternity returnees.)

- Would you ever consider reporting findings of men and women's representation at different levels and/or the gender pay gap:
  - internally to the Board and/or management team
  - reporting internally to staff
  - reporting externally? Please give reasons for your answers.
- What would be different in your approach when reporting internally or externally? Why?

### **Section D – Sharing info externally**

- Do you think yours and other companies should voluntarily publish information on gender pay externally? Why do you hold this view?
- Do you know of other organisations in your sector who conduct this analysis?
  - Why do you think they do this?
  - Do you use the information they publish to compare to your own? Do you find this useful? Interesting?
- What do you perceive to be the costs of having greater transparency and wide availability of information on equality for:
  - your organisation
  - your sector.
- What do you perceive to be the benefits of having greater transparency and wide availability of information on equality for:
  - your organisation
  - your sector
  - society.

### **Section E – Action, changes and outcomes**

- Does your organisation believe the pay gap is something that should be addressed?
  - If so: What action have you taken/got planned to achieve this?
  - If not: Why is this?

- What actions, if any, have you taken to address workforce diversity in your organisation? How effective have these been?
  - If not, do you have any planned actions or activity in the future?
- What is the decision-making process for changes to diversity policy and practice in your organisation?

### **Section F – General opinions on voluntary gender equality reporting**

- What would encourage you to voluntarily report gender pay gap, participation of men and women at different levels in your organisation and other equality data?
  - What support would you need to do this?
- It has been suggested that, where organisations are going to make public information about pay gaps or equality in their organisation, it would be useful to include additional information alongside it that provides a context. If your organisation was going to make this information public, which of the following would you use:  
(prompts)
  - information on the organisation, its business and HR strategy, etc
  - information on the sector/external environment eg skills, demand etc
  - Explanation of any gender pay gaps revealed
  - Information on initiatives to address any gender pay gaps highlighted
  - Wider diversity and human capital information eg male/female ratios, take up of training by gender, etc.
- Would you like any support to help develop your current approach to data collection and/or reporting? If yes, what type of support?
- Finally, is there anything else you would like to say on this topic?

Thanks and close.

### **Employers that collect and publish data**

#### **Introductory questions**

- Can you tell me about your role in the organisation? How is HR organised/approached within your organisation? (INTERVIEWER to probe on whether HR is respondent's main role, size of HR team, whether all HR functions are based at this site or devolved/central)
- How, if at all, would the achievement of equal pay support your business objectives?
- [If not covered in answer to above question] How important is the achievement of equal pay for your organisation? Why?

## **Section A – Collecting sufficient data**

INTERVIEWER: I understand you collect data and look at the difference between men and women's pay (the gender pay gap) in your organisation. Is that right?

- If yes, what data do you collect? How often? How?
- Does your organisation also collect reliable data on (if not mentioned above):
  - the numbers of men and women promoted each year?
  - the uptake of flexible working arrangements, such as flexi-time, job shares, home working, term-time working, zero hours contracts, annualised hours?
  - the components of total pay for individual employees, ie overtime, bonuses, shift pay?
  - maternity leavers (number on leave, number returning, number staying with organisation)?

## **Section B – Extent of analysis and reporting**

- Who conducts the gender pay analysis in your organisation, for example, HR, Finance, Department Heads? How often is it done? When did you start? Why?
- Who requested gender pay analysis to be done in your organisation and was there an underlying reason for this?
- What measure do you use to analyse differences between men and women's pay? ie single figure, full-time, part-time, by job grade etc.
- [If conducts analysis of gender pay with more than one measure] Which of the measures you use is most important to your organisation and why?
- What overall difficulties do you experience when conducting the analysis?
- What informed your decision on how to conduct the analysis, for example, the data available, the methods of similar organisations, guidance, other standards? probe answers given around guidance and standards.
- Are there any differences to your approach when reporting:
  - internally to the Board and/or management team
  - reporting internally to staff
  - reporting externally?
- [If has individual performance related bonuses] Has your organisation ever explored the differences between genders in performance bonus payouts? If yes, what did it show? If not, is it something you would consider doing? Probe
- Do you conduct any analysis around maternity returnees? If yes, what do you analyse?
- What do you think are the causes of any pay gap in your organisation?

### **Section C – Sharing info internally**

- Check: Do you report analysis findings internally to staff? Yes:ASK Q17, No: Move to Section D
- How do you report information about the gender pay gap within your organisation to staff? (i.e. what data is given, how is it shared i.e. on Intranet etc)? To all or specific staff? What was their response?

### **Section D – Sharing info externally**

- Do you think yours and other companies should voluntarily publish information on gender pay externally? Why do you hold this view?
- Do you know of other organisations in your sector who conduct this analysis?
  - Why do you think they do this?
  - Do you use the information they publish to compare to your own? Do you find this useful? Interesting?
- What do you perceive to be the costs of having greater transparency and wide availability of information on equality for:
  - your organisation
  - your sector.
- What do you perceive to be the benefits of having greater transparency and wide availability of information on equality for:
  - your organisation
  - your sector
  - society
- Check: Do you publish your data externally? If yes: Q23; If no: Section E
- When did you first do this? Do you plan to continue to do this?
- Have you ever included further information explaining the causes of any gender pay gaps you have found? Yes(externally)/Yes (internally)/No

### **Section E – Action, changes and outcomes**

- Does your organisation believe the pay gap is something that should be addressed?
  - If so:What action have you taken/got planned to achieve this?
  - If not:Why is this?
- Has reporting on the difference between men's and women's pay been a positive or a negative experience for your organisation? Please provide a reason for your answer



- What actions, if any, have you taken to address workforce diversity in your organisation?  
How effective have these been?
  - If not, do you have any planned actions or activity in the future?

**Section F – General opinions on voluntary gender equality reporting**


- Would you like any support to help develop your approach to data collection and/or reporting?  
If yes, what?
- Finally, is there anything else you would like to say on this topic?

Thanks and close.

# Annex 3: Costs and Benefits of Transparency

**Table A.4: Respondents views on the costs and benefits of greater transparency on equality**

| Costs to Organisation   | Benefits to Organisation  |
|---|---|
| 'Additional costs in getting a consultant to do the work for us.'   | 'If there was compulsory disclosure it would be good if we were a best practice employer in terms of reputation.'   |
| 'There are always costs associated with data you publish externally; as you put more people onto it, you analyse your results, you double check it to make sure it is absolutely correct, so costs would be the time resource. Other organisations might also come out as more favourable than ours so this might entail a cost to address this if we wanted to be a best practice employer.' | 'Could help with recruitment if people could see the organisation was transparent and fair. Could provide a competitive advantage.'   |
| 'Maintaining competitive position may be difficult if this information was shared externally; it would depend on what the information showed.'  | 'To prove we are being fair. I wouldn't be as open if I thought we were unfair, but if I could demonstrate that we are not afraid to give people the statistics on things because we are a fair employer, I would not be afraid to report. I'm not sure how we would report it internally but it would demonstrate that we treat staff fairly.' |
| 'My time would be a cost because the systems we have are not really conducive to this type of reporting. We don't have a specific HR database. Transparency would be time consuming as I just work from spreadsheets at the moment.'  | 'For a big company there might be a need to have greater transparency for employees, but not a company our size.'   |
| 'A lot of companies won't want to share information in case they expose inequalities.'  | 'In terms of us being able to demonstrate we are ahead of the market it would be beneficial. But no real benefit at the moment as we are ahead of the market because of the niche we work in. Longer term it would be useful to advertise we are a fair employer through this type of reporting and we could differentiate ourselves.'          |
| 'The costs of analysing the gender pay gap are time. The length of time is extended as we have a manual system. It would not be seen as a priority given the other responsibilities.'   |   |
| 'Costs potentially in adjusting pay to remove any gaps.'  |   |
| 'Increased administrative burden.'  |   |



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