Getting to Equal 2020:
Disability Inclusion
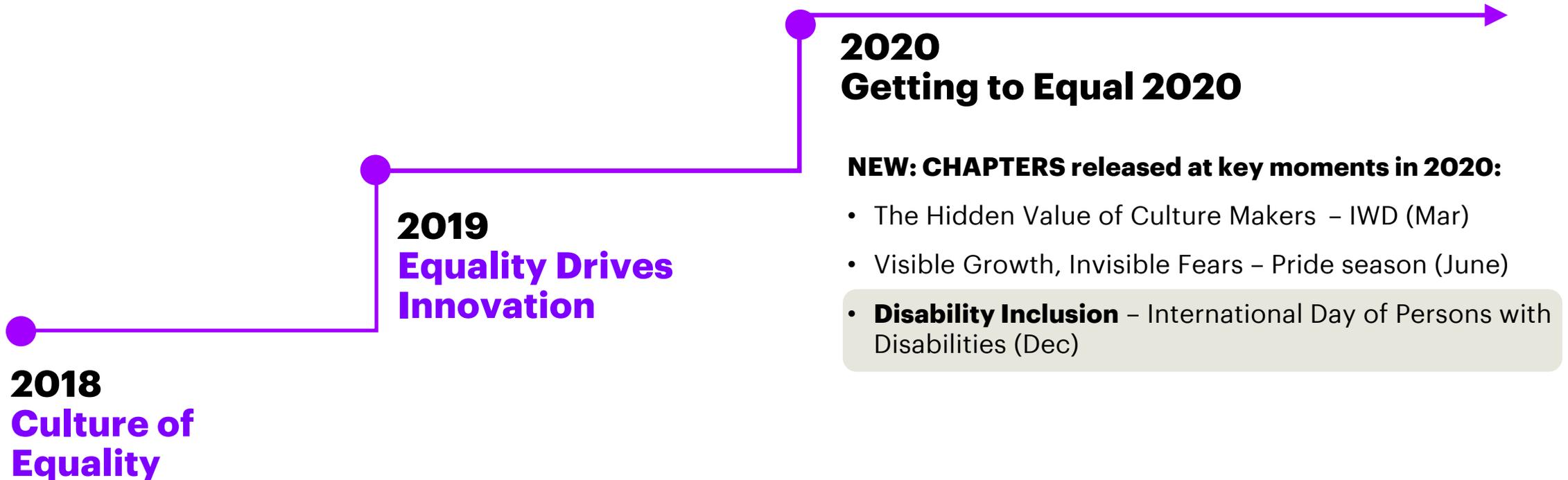
Key findings deck
South Africa

I&D research in 2020
Overview

- Third in our 'Getting to Equal' Series, building on our successful story about workplace culture and why it's the key to creating equality
- One study generated multiple chapters for key moments throughout 2020
- To enhance Accenture's reputation on inclusion and diversity in its broadest sense
- Tangible actions for clients

2018
Culture of Equality

2019
Equality Drives Innovation

2020
Getting to Equal 2020

NEW: CHAPTERS released at key moments in 2020:

- The Hidden Value of Culture Makers – IWD (Mar)
- Visible Growth, Invisible Fears – Pride season (June)
- **Disability Inclusion** – International Day of Persons with Disabilities (Dec)

Overview of this deck

Data availability

Global only

Local geo

Global Story in Brief

- Persons with disabilities represent about **15%** of the world's population – but very few are in employment; for example, just **6.5%** in China, **25%** in India and **31%** in United States

- Even in paid employment, employees with disabilities are **27%** less likely to feel 'included' in the workplace – and 60% more likely to feel 'excluded' – compared with colleagues.

- Workplaces suffer from a lack of transparency and trust: **76%** of employees are not fully open about their disability – as are **80%** of executives, denying employees role models who could inspire and mentor them.

- But employees with disabilities are thriving in some companies; if all companies had cultures that were as equal as the top 10%, the likelihood of an employee with disability being engaged would be up to **1.5x** higher

- Organizations led by executives focused on disability engagement are growing sales **(2.9x)** and profits **(4.1x)** faster than peers.

- Our blueprint for disability inclusion outlines **eight actions** executives can take today to raise the engagement of persons with disabilities in the workforce today.

Detailed findings

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Persons with disability are underemployed

15%
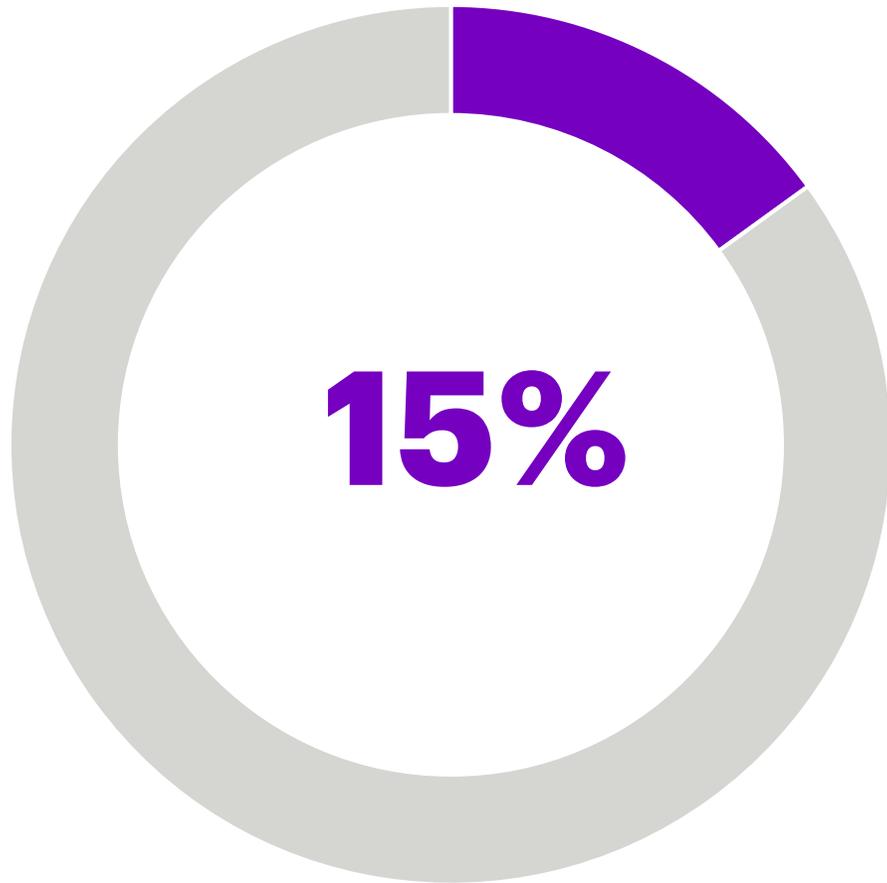
- An estimated **15%** of the global population have a disability

- However very few are economically active, ranging from approximately **44%** in higher income countries down to **10-20%** in lower income countries

- The employment rate for persons with disabilities ranges from **6.5%** in China and **25%** in India to **31%** in the US and **53%** in the UK
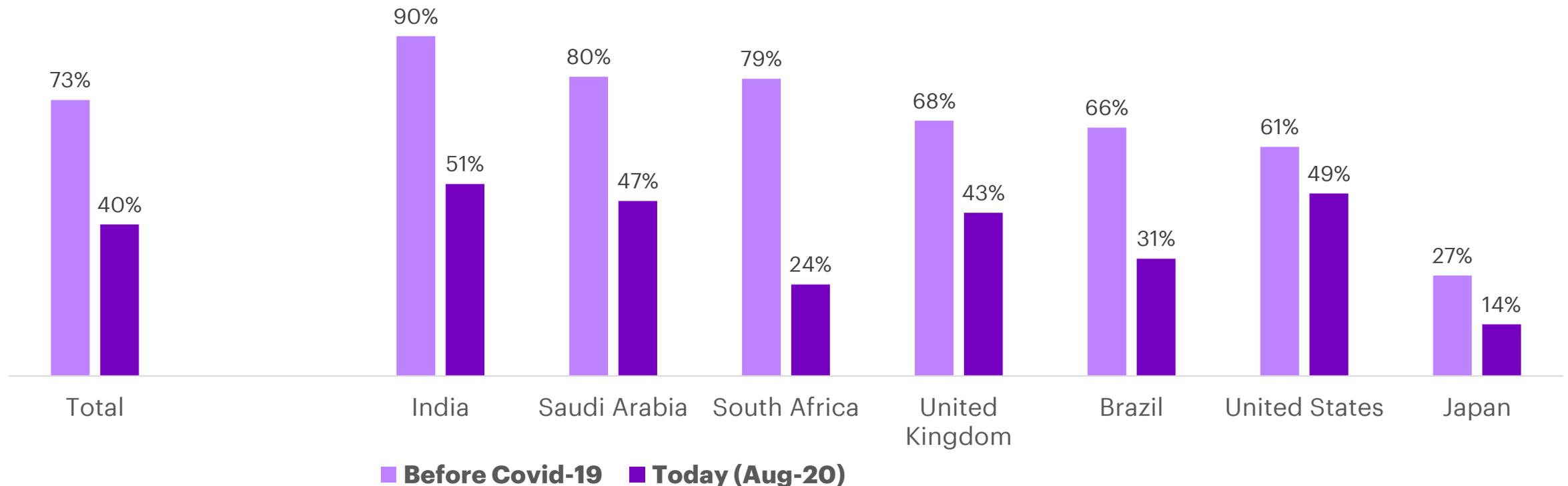
[See notes for sources]

COVID-19 has exacerbated inequalities – income security confidence has fallen
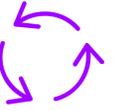
The proportion of employees with disabilities who are confident in their job/income security fell from **73%** to just **40%** in the six months to August 2020.

Please describe the level of confidence you have in your job and income security: Before Covid-19 vs 'Today'
% respondents with a disability selecting 'confident' or 'very confident' on a 5-point scale

Chart data:
- Total: Before Covid-19 73%, Today 40%
- India: Before Covid-19 90%, Today 51%
- Saudi Arabia: Before Covid-19 80%, Today 47%
- South Africa: Before Covid-19 79%, Today 24%
- United Kingdom: Before Covid-19 68%, Today 43%
- Brazil: Before Covid-19 66%, Today 31%
- United States: Before Covid-19 61%, Today 49%
- Japan: Before Covid-19 27%, Today 14%

Legend: ■ Before Covid-19   ■ Today (Aug-20)

And in employment, many feel excluded

Employees with disabilities are **33%** less likely to feel 'included' in the workplace – and **42%** more likely to feel 'excluded' – compared with the average
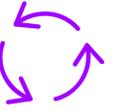
Employee: Which of the following statements best describes how you feel in your team/organization?
See notes for more detail on options

All employees:
- 24%
- 18%
- 37%
- 17%
- 5%

-33%

+42%

Employees with disabilities:
- 16%
- 16%
- 38%
- 23%
- 8%

All employees

Employees with disabilities
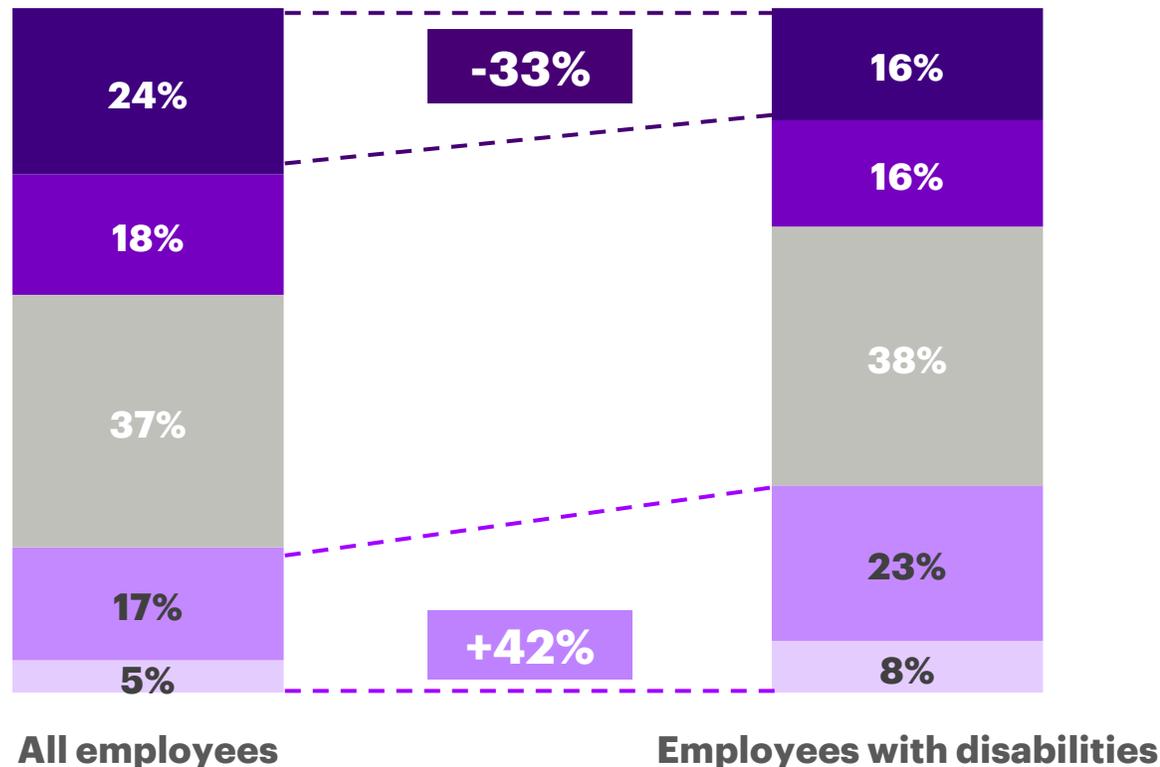
- ■ I feel like a key component of my team with real influence over decisions
- ■ I have some influence over decisions, but do not feel like a key component of my team
- ■ I feel safe voicing my views and opinions, but I have little influence over decisions
- ■ I am noticed by some people, but do not feel safe voicing my opinions
- ■ I am generally ignored by others

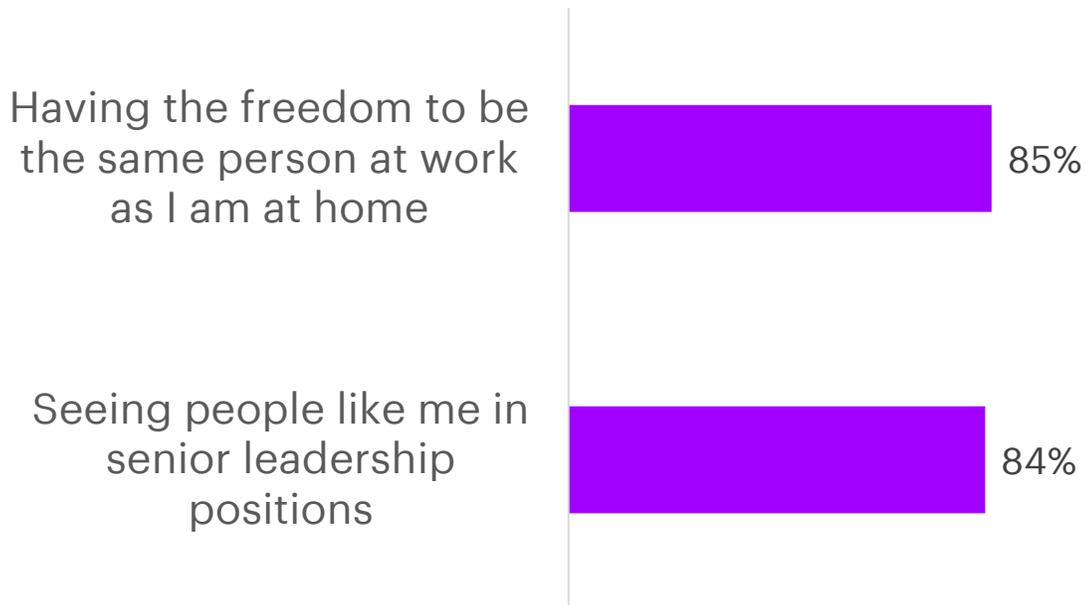*Source: GTE 2020; South Africa Total Employees N=1017; Employees with disabilities N=238*

# Workplaces suffer from a lack of transparency and trust

Most employees with disabilities cite freedom to be themselves and role models as important – but **69%** of employees – and **80%** of executives (globally) – are not fully open about their disability

**How important are the following factors in helping you to thrive in the workplace?**

% of employees with disabilities who cite elements as "(very) important"

Having the freedom to be the same person at work as I am at home — 85%

Seeing people like me in senior leadership positions — 84%

Who at your organization is aware of your health problem / disability?

	Executives with disabilities (Global)	Employees with disabilities
Everyone	20%	31%
Some others*	56%	50%
Just me	24%	19%
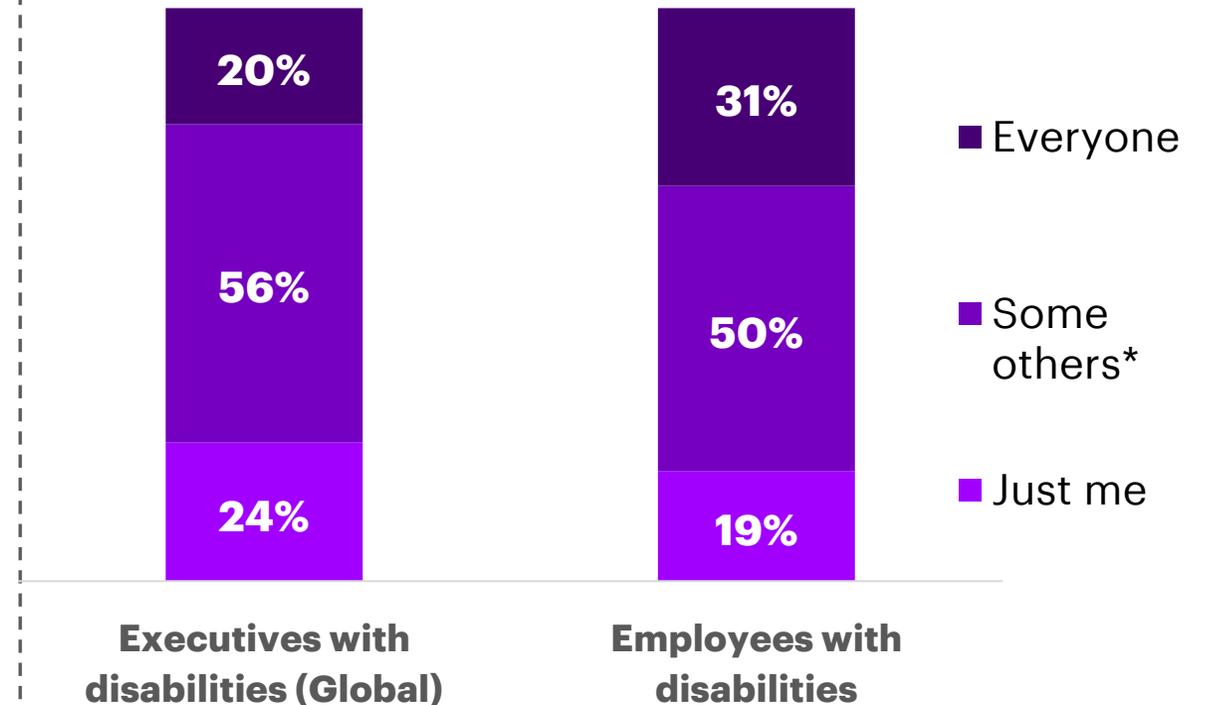
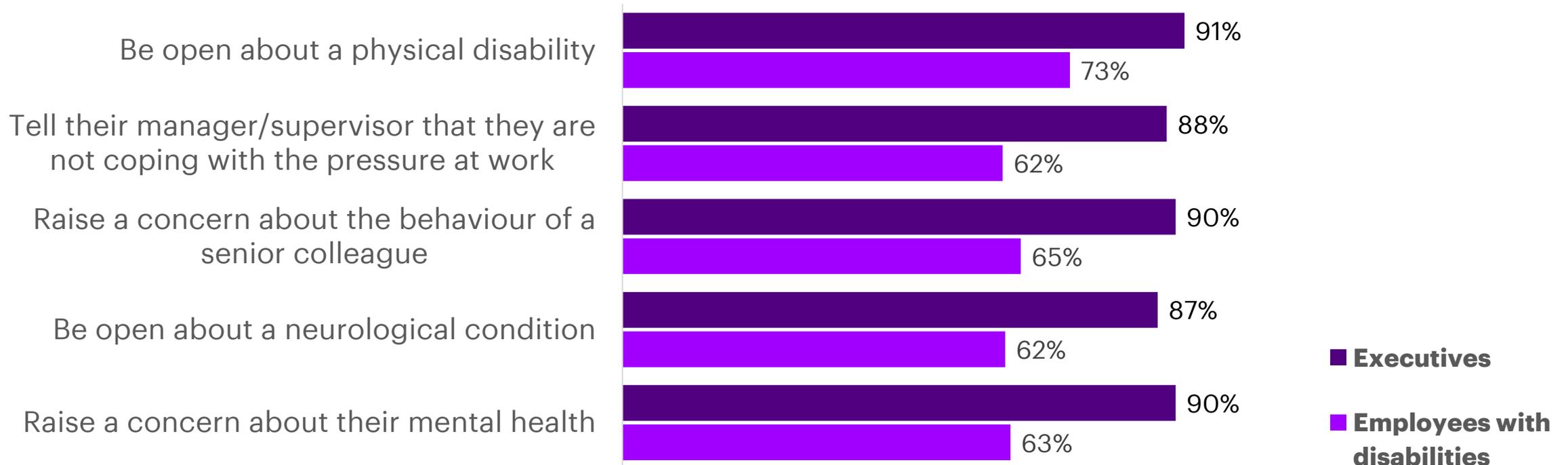# Employees are more afraid to raise sensitive issues than executives believe
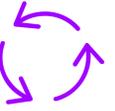
Leader perception of how safe employees with disabilities feel raising sensitive issues is ~**35%** higher than employees themselves feel.

Executive: To what extent do you believe employees in your organization feel safe to..
Employee: To what extent do you feel safe to...
% Quite / Completely safe

Be open about a physical disability
- 91%
- 73%

Tell their manager/supervisor that they are not coping with the pressure at work
- 88%
- 62%

Raise a concern about the behaviour of a senior colleague
- 90%
- 65%

Be open about a neurological condition
- 87%
- 62%

Raise a concern about their mental health
- 90%
- 63%

■ **Executives**

■ **Employees with disabilities**

Culture change hampered by perceptions gaps

80% of executives believe they create environments in which employees with disabilities can thrive, but just **46%** of employees agree – and just **27%** feel their fully supported by their employer.

To what extent do you agree or disagree that the organization has all the right technology, environment and support in place to enable people with disabilities to thrive?

% Agree / Strongly agree

80%

46%

Executives

Employees with disabilities
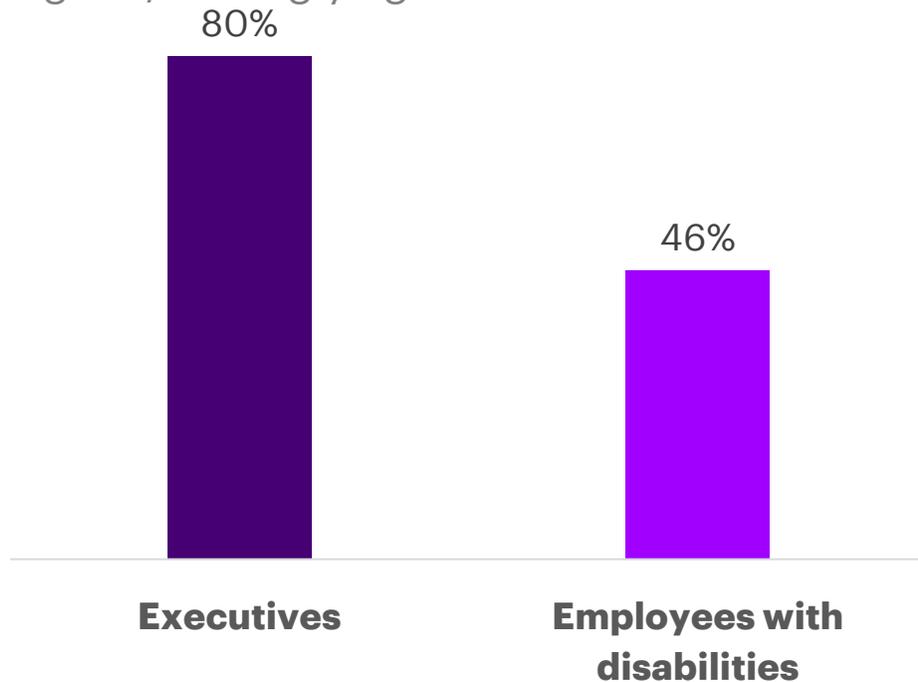
To what extent do you agree or disagree that...

- Leaders take action to get more employees with disabilities into **senior roles**
- Progress on disability diversity is **measured** and shared with employees
- Leaders are held **accountable** for improving disability diversity
- Fully **committed** to hiring, progressing and retaining employees with disabilities
- The organization is very **welcoming** to employees with disabilities

27%
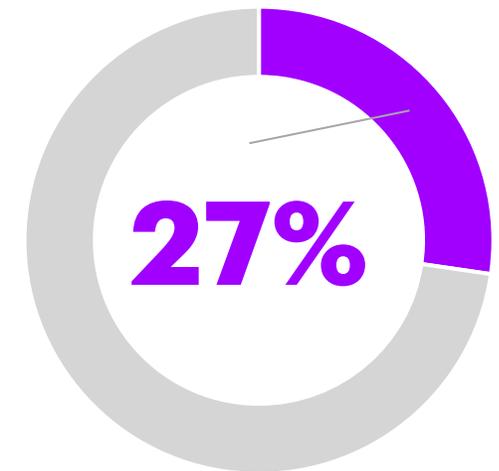
% employees with disabilities agreeing to all 5 statements

Source: GTE 2020; Executives N=69, Employees wIth disabilities N=238

What can we learn from the environments in which employees with disabilities *are* thriving?

Our survey asked almost 6,000 employees with disabilities to assess their levels of **engagement** in the workplace in terms of their career satisfaction and aspirations, and their sense of confidence and belonging.

We mapped their answers against the presence and strength of **200+ workplace culture factors** to understand which have a significant and positive effect on the likelihood of employees with disabilities thriving.

We call the top 10% of workplaces – where these key workplaces factors are most common – '**more equal**' cultures.
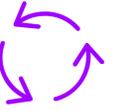
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The workplace factors that matter

Our model identified **eight** factors that are positively and significantly correlated with employees with disabilities thriving in the workplace.
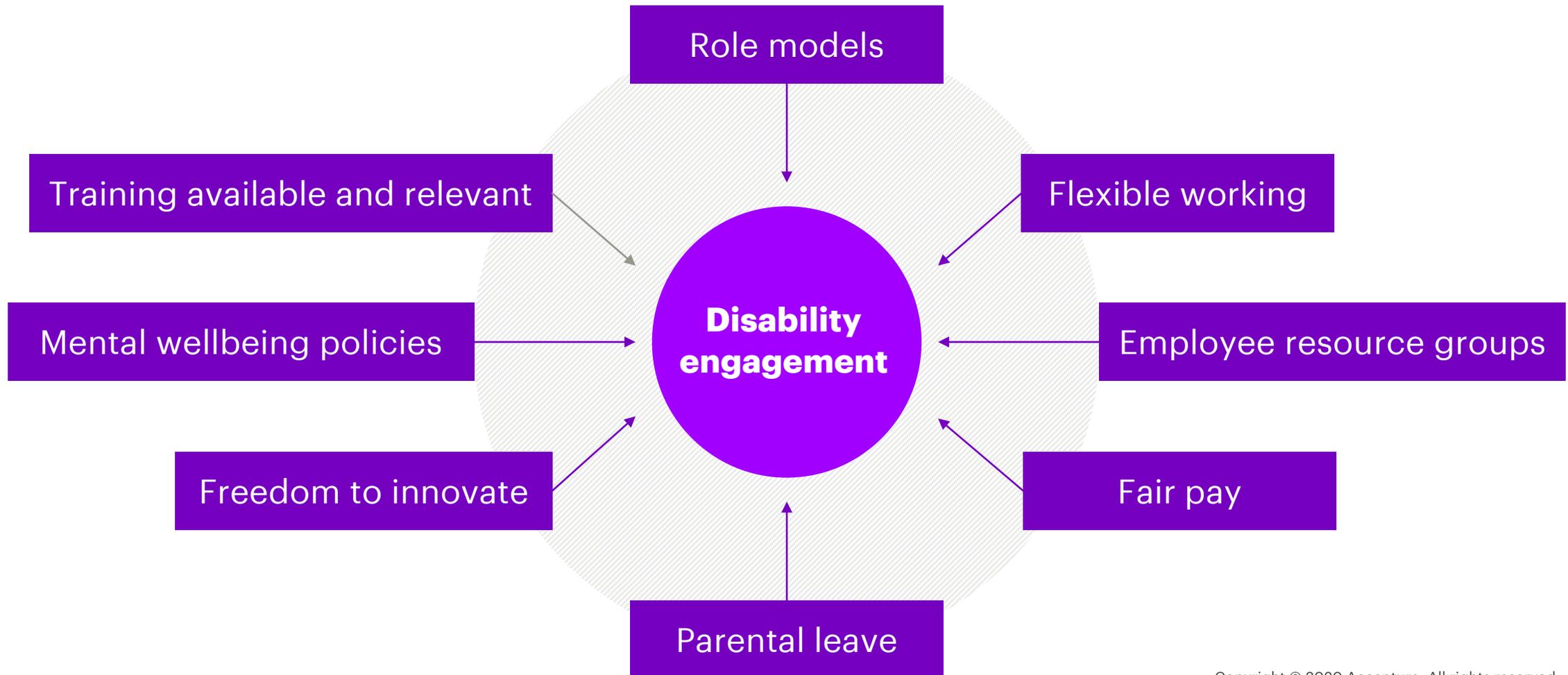
These factors boost employee engagement

If all employees with disabilities worked in organizations where these factors are as common as they are in the top 10%:

1.5x   Overall engagement levels would be up to **1.5x** higher

2.1x   Career satisfaction and aspirations would be **2.1x** stronger

**1.5x**   Sense of confidence and belonging would be **1.5x** higher

Disability engagement can also be linked to commercial benefits

Organizations led by executives focused on disability engagement are growing sales (**2.9x**) and profits (**4.1x**) faster than peers.

How would you describe the typical annual growth profile of your company over the past 3 years?

Sales

EBITDA (Profits)

- Disability engagement advocates
- Other executives
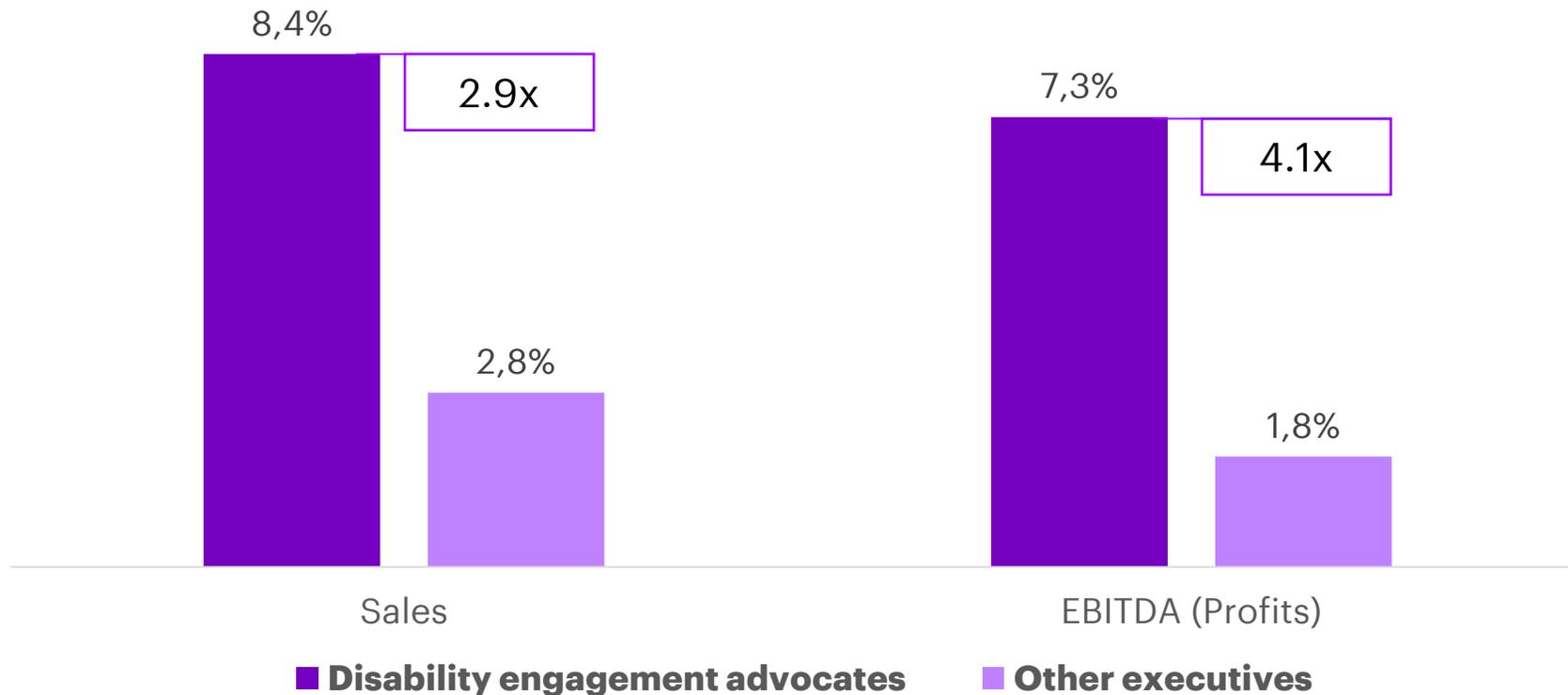
Disability engagement advocates

- Identify the eight factors as important to helping employees thrive
- Committed to disability engagement e.g., organization has disability targets, they have personally spoken out about disability rights

Appendix

How we identified persons with disabilities

Survey respondents were asked:

- *Do you have any difficulty in performing day-to-day activities (e.g., walking, communicating, hearing, seeing even if wearing glasses) because of a mental, intellectual, sensory or physical health condition which has lasted, or is expected to last, at least 6 months?*

And they were given the following response options:

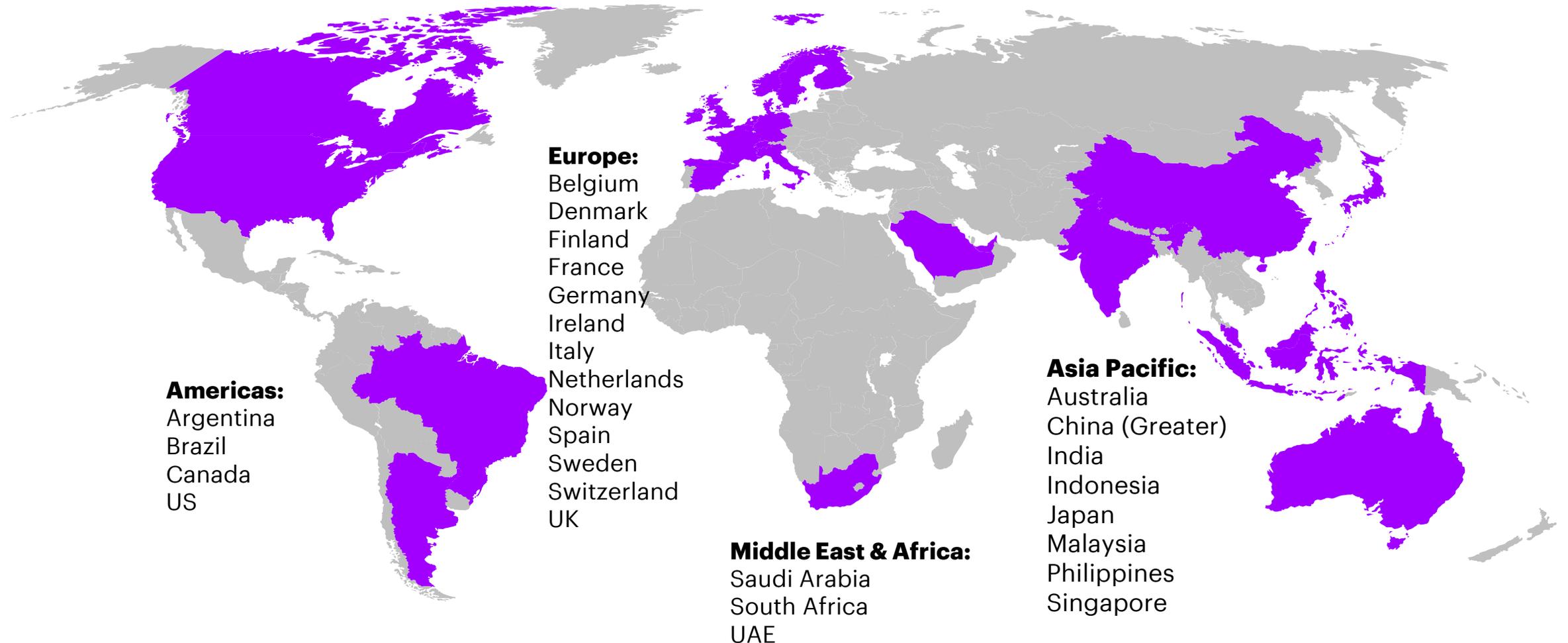- *No*
- *Yes, some difficulty*
- *Yes, a lot of difficulty*

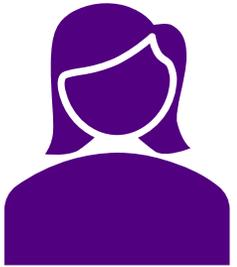Respondents who answered 'Yes' were defined as having a disability

Geo scope

We conducted online surveys of 1,700+ senior executives and 30,000+ employees in 28 markets in October/November 2019.

Europe:
Belgium
Denmark
Finland
France
Germany
Ireland
Italy
Netherlands
Norway
Spain
Sweden
Switzerland
UK

Americas:
Argentina
Brazil
Canada
US

Middle East & Africa:
Saudi Arabia
South Africa
UAE

Asia Pacific:
Australia
China (Greater)
India
Indonesia
Japan
Malaysia
Philippines
Singapore

Survey demographics

1,700+ Senior Executives [n=675 with a disability]
- **Geo split**: 50+ in each geo*; 100+ in UK, US
- **Org size**: 50+ employees min; 19% with 5,000+ employees
- **Seniority**: 60% Executive / 40% Direct reports
- **Demographics**: 32% women; 13% LGBT; 20% ethnic minority (US)

30,000+ Employees [n=5,870 with a disability]
- **Geo split:** Min. 1,000 in each geo, 1,500+ in UK, US
- **Seniority**: Below Executive; not on management committee
- **Demographics:** ~20% have a disability, ~10% LGBT+
- **Ethnic minorities**: splits available in US, UK, South Africa
- **Misc**: All education levels; All professions

28 geos

*excludes Japan

Modelling overview

1. WHAT WE MEAN BY "THRIVING"

- We identified 12 positive situation variables for employees with disabilities from our study
- These are used to understand the extent to which an employee is **"thriving"** in the workplace
- "Thriving" could be swapped out for "engaged"

2. THE FACTORS THAT MATTER

- We tested all culture factors in our study to identify which have a significant and positive effect on employees "thriving"
- This allows us to determine what an **"inclusive culture"** looks like for employees with disabilities

3. BEST PRACTICE: WHAT IF...

- We scored every respondent in the study based on the strength of these factors
- This allows us to segment the **"top 10%"** to show how the presence of these factors correlates with improved employee experience

How we define "thriving" / being "engaged"

We group the 12 'situation variables' into two buckets

CAREER	CONFIDENCE
Satisfied with pace of advancement to date	Feels contributions are appreciated, and respected by peers
Confident of being able to advance at desired pace in the future	Feels contributions are appreciated, and respected by manager/supervisor
Loves job	Feels comfortable asking questions
Aspire to be promoted	Does not feel my questions/concerns are ignored
Aspire to senior leadership position	Feels like a key component of team with a real influence over decisions
Likely to be working for current employer in 12 months	Does not feel like an outsider