



Retail  
**TRUST**  
1832 ONWARDS



# Impact report 2022

Creating hope, health and happiness for everyone in retail







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# An outstanding year for the Retail Trust signals a sea change for retail.



**Alistair McGeorge**  
Chair, Retail Trust

Welcome to our 2022 impact report, which deals with the year ending April 2022.

Twelve months that have been characterised by post-pandemic uncertainty, global unrest, and a cost-of-living crisis that has seen prices soar for everything from food to energy and left many struggling

financially. Retailers are facing significant challenges, from supply chain issues to a rise in reported abuse and violence directed at people with customer-facing roles and a burned out and disillusioned workforce. The majority of retail workers surveyed in our annual health of retail report told us that they have experienced a deterioration in their mental health, with many considering leaving the sector altogether, and there has been a sharp increase in the number who worry about money every day.

Against this turbulent backdrop it is heartening to see how far the industry has come and how committed it remains to improving workplace wellbeing. There has been

a sea change in employers' approach to colleague wellbeing, with many retailers experiencing a considerable culture shift towards putting people's wellbeing at the core of their businesses.

Demand for our services has reached unprecedented levels as more businesses than ever have joined the Retail Trust. It is clear that our strategy in driving engagement and awareness of our services, our focus on the importance of wellbeing and the link between the success of a business and the health of its people is paying off.

We have evolved our training to help meet the current challenges facing retail. All our training courses are CPD (Continuing Professional Development)

accredited and, in direct response to the intolerance epidemic, we've developed a specific physical and emotional safety course to help retail colleagues deal with challenging situations.

In November we hosted our first Leaders' Summit in London, bringing together mental health trailblazers, industry change makers and people leaders for a one-day programme of inspiring content. Session topics included retaining top talent, building a wellbeing strategy and tackling the taboo around menopause, led by Davina McCall. Over 130 leaders from more than 80 organisations attended the event which had a social reach of 61,000 and a media reach of over 600,000. →



**Retail Trust  
Leaders' Summit  
2021**

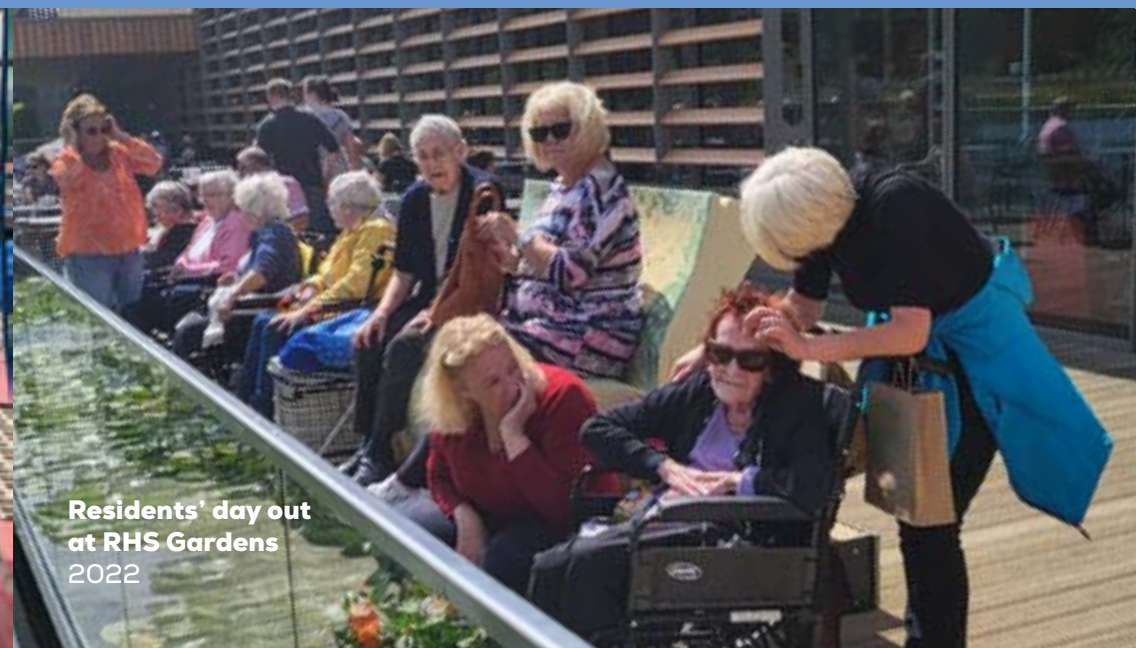


## Chair's message

**ArcelorMittal Orbit  
abseil  
2021**



**Residents' day out  
at RHS Gardens  
2022**



### “Demand for our services has reached unprecedented levels”

→ Fundraising income from events increased by 136% over the period and 44 retailers and industry partners took part in two challenges, the Royal Parks half marathon and ArcelorMittal Orbit abseil, raising a combined total of £35,290.

The teams on our supported-living residential estates have continued to deliver industry leading support and work has commenced on the refurbishment of the beautiful listed Marshall Hall on the Marshall Estate in London to create ten new smart flats

as well as the refurbishment of older housing stock on the Hugh Fraser Retirement Estate in Glasgow.

All of this has resulted in a 31% increase on the previous year of our social and economic value to £129.2 million, which in itself was double the year before. For every £1 the Retail Trust spent last year, we created £15.63 of social and economic value. Our wellbeing services, which include our 24-hour helpline, short-term counselling, self-guided therapy, online self-help resources, wellbeing training, financial aid and critical incident support, generated £97.5 million in social value, close to the value generated by the entire Trust last year and twice as much as the entire

organisation did two years ago. This phenomenal performance has been driven by the introduction of new services to better meet the needs of struggling colleagues such as counselling for children and young people and our provision of mental health and wellbeing training services for 3,870 managers and retail staff. Some 263,768 people accessed our helpline and digital self-help support, we provided 7,460 telephone counselling calls for in-the-moment support and in total delivered 10,316 counselling sessions to colleagues for a range of mental health worries, and provided £403,000 in financial aid to those struggling the most.

Our cause, part of the DNA of the Retail Trust for 190 years, is to create hope, health and happiness for everyone who works in retail. We have continued to grow our coalition of people, leaders and brands who believe in our mission.

As the UK's largest industry, we have only just begun to scratch the surface of the good we can do. Together we will effect change that benefits our colleagues, their communities, the companies they work for and the retail industry as a whole.

**Alistair McGeorge,**  
Chair, Retail Trust



# The methodology explained.

The Public Services (Social Value) Act 2012, requires people who commission public services to think about how they can improve the social, economic and environmental wellbeing of their local area.

Before they start the procurement process, commissioners are asked to look at whether the services they are going to buy, or the way they are going to buy them, could secure these benefits.

We have worked out the social return on investment (SROI) ratio by calculating the value our

services offer to people and their communities, against the cost of delivering those services. We believe that this measurement provides the strongest evidence of the value for money we deliver. The figures have been calculated by Loop our social value partner, who have used HM Treasury approved methodologies.

The Retail Trust delivered over £129 million of social and economic value to individuals and local communities, a 31% increase on last year. The numbers reflect in financial terms the impact we have had on the lives of the colleagues we have supported. The total includes savings to the NHS through improved health and wellbeing benefits, better life opportunities and a reduction in sick pay claims.



# Transforming lives for 190 years.

Our cause is to create hope, health and happiness for everyone who works in retail from frontline workers to senior leaders.

This purpose is at the heart of why the Retail Trust exists and has been enshrined in our DNA since we were formed 190 years ago. Whether at the start or the end of their retail career, we put our colleagues at the centre of everything we do.

The retail industry is facing a huge wellbeing challenge, but we're on a mission to help retailers navigate this by providing a holistic wellbeing solution for colleagues, line managers, HR and people directors, and leaders.

Increasingly we want to make sure we're addressing the root causes of poor workplace wellbeing and health, as opposed to dealing with the symptoms. Our unique retail expertise and collaborative approach helps colleagues and businesses thrive.

Working alongside retailers large and small we are building a coalition of people, leaders and brands who believe in our mission to create a happy, healthy workforce. We provide tools, services and channels to empower colleagues to look after their mental, physical and financial health and to empower leaders and line managers to make better decisions around the health and happiness of their teams.



# Our impact in a snapshot.

We created  
**£129.2 million**  
in social and economic value

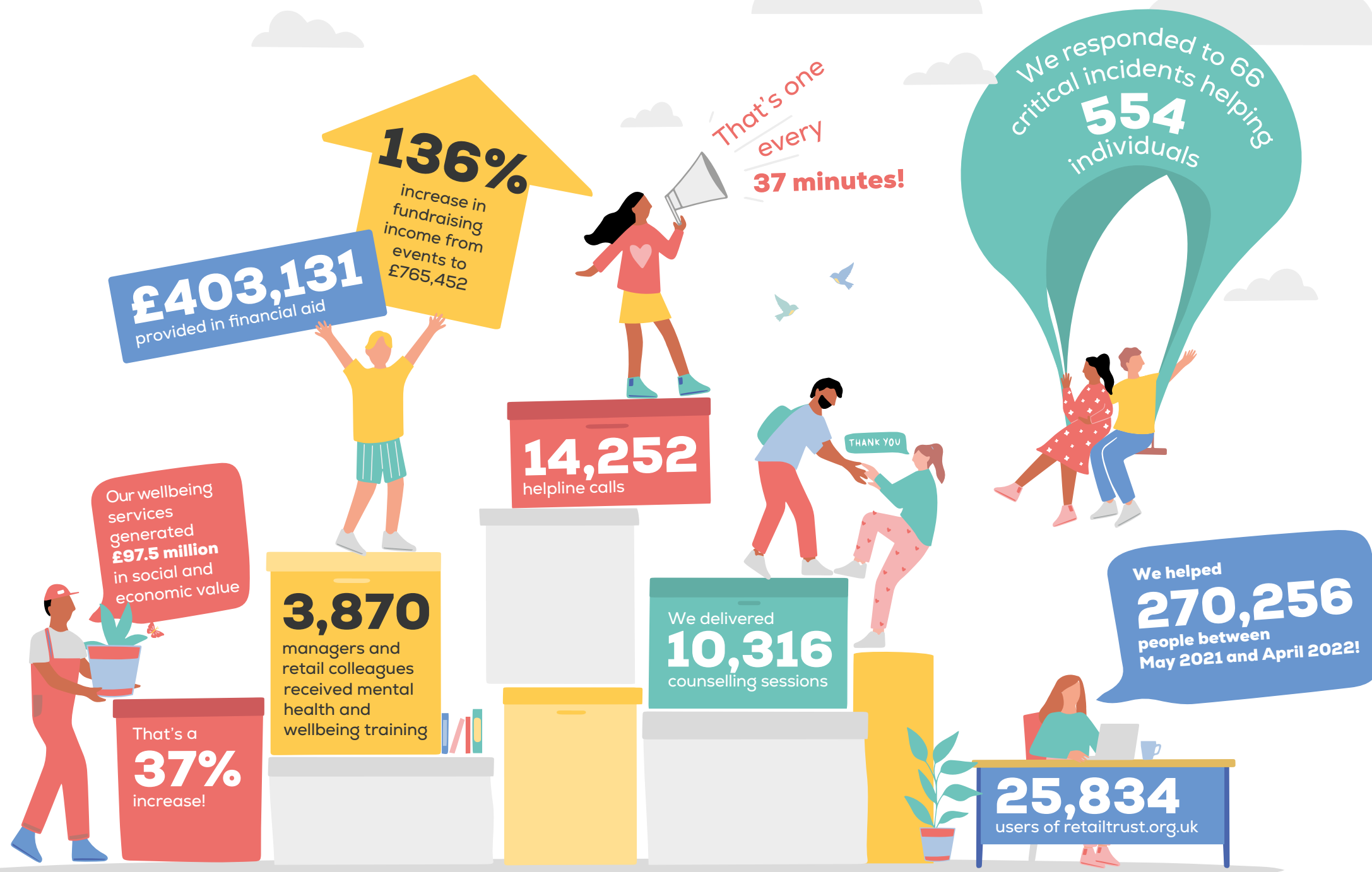
**31%**  
more  
than  
last year

We grew our social return  
on investment (SROI) to  
**£15.63**  
for every £1 invested

That's  
**33%**  
more than  
last year







# Wellbeing for all.

The Retail Trust continues to provide access to support for everyone working in retail.

Retail is constantly evolving but at its core it remains a people-first business and at the Retail Trust we have always followed a person-centric approach to ensure those in need are at the centre of everything we do. Through our wellbeing services we connect with colleagues from the shop floor to the boardroom and work in partnership with businesses to better equip and empower colleagues, managers and leaders to manage their wellbeing and live happy, healthy lives.

We passionately believe that everyone working in retail should

have access to the support appropriate to their individual needs and manage their wellbeing whenever they need it. Our end-to-end wellbeing solution includes a 24-hour helpline, short-term counselling, self-guided therapy, online self-help resources, mental health and wellbeing training, financial aid and critical incident support.

In the past year our wellbeing services generated £97.5 million in social value – an increase of 37% – almost as much as the entire Trust delivered last year, and twice as much as the entire Trust delivered the previous year. In total, 263,768 people came to us for in-the-moment and online support from May 2021 to April 2022.





## Wellbeing services



### Needs



Mental health and wellbeing services accessible for all

### Input



£1,707,603

### Activities



Helpline, short-term counselling, self-guided therapy and digital self-help support, wellbeing training, critical incident support and financial aid

### Outputs



Providing a range of touch points for colleagues to engage with wellbeing specialists and trusted content to help them manage their wellbeing

### Outcomes



Reaching and helping more people through the delivery of online information, advice and guidance as well as in-the-moment support to help those with immediate needs

### Total value created



£97,528,175

### SROI ratio



**£57.11**  
for every £1 invested

### We champion mental health awareness

By providing colleagues with information, advice and guidance regarding wellbeing approaches and increasing awareness, knowledge and understanding across the industry, our aim is to further reduce the stigma associated with mental health and empower people to better manage their mental, physical and financial wellbeing. Where appropriate we also provide access to evidence-based therapeutic interventions. Our unique expertise in retail, combined with a people-first approach enables us to provide tailored preventative support that makes a real difference. 25,834 users of our website accessed 165,449 pages of digital resources on a wide range of mental health and wellbeing issues, from low mood, stress and anxiety to financial literacy and suicide awareness.

### We support people when they hit crisis point

Our helpline team is available 24 hours a day to help people who need immediate assistance. The team, in collaboration with the colleague, will provide appropriate support to assist them in managing their immediate situation, which includes providing access to ongoing therapeutic counselling for those who need it.

From May 2021 to April 2022 we took a call every 37 minutes from someone in retail who needed help – a total of 14,252 calls – and delivered 10,316 counselling sessions via our highly trained counselling team. We responded to 66 critical incidents and our critical incident responders supported 554 individuals.

### We give financial aid when it's needed most

The ongoing cost-of-living crisis has left thousands of families struggling financially, which can have a huge impact on mental health. From supporting people worried about money because of a health condition (theirs or a family member) to helping towards the cost of rent and essential bills or assisting with unexpected costs, the Retail Trust has provided £403,131 in financial aid to those who are struggling.





“I heard about the Retail Trust through posters at work. The process of applying for financial aid was quick and easy with no negative judgement, unlike working with other financial services which felt like wading through treacle. **The support gave me the chance to breathe again for the first time in months.**”

**Joy,**  
Screwfix colleague.

Joy contacted the Retail Trust for financial aid when she was told she was going to be evicted from her flat because her landlord hadn't been paying his mortgage and the flat she was living in was being repossessed.



“I thought I couldn't cope until **the Retail Trust showed me how.**”

Struggling to deal with the pressures of a new job, stock controller Chris Stoddart suffered a panic attack and walked out of work. An email to the Retail Trust was the first step to help lift him from rock bottom, rebuild his confidence and develop coping techniques for the future. →



**Chris**  
Retail colleague



## Wellbeing services – Chris’ story

→ “I got my first job in retail at a sports store when I was 16 and worked there for 25 years. Last year I decided it was time for a change and took a back-of-house job as a stock controller at a flagship luxury goods store.

“In my new role, I was in charge of seeing deliveries in, distributing stock, and dealing with over 1,000 inter-branch transfers a week. I felt a lot of pressure but I didn’t know how to voice my worries and because I was new I didn’t have friends at work I could talk to.

“Although I’d always been good at switching off after work, I started having trouble sleeping. I’ve suffered from mental health issues in the past, including feelings of low self-esteem and I felt overwhelmed – that I was an imposter, couldn’t do the job and wasn’t good enough.

“It all came to a head six weeks into my new job. When I got to work that morning, I started having a panic attack. I went on social media, typed ‘HELP’, switched my phone off and walked out. I was missing for about four hours before I was found in the street by a family friend, who took me home.

“A colleague from my old job recommended that I get in touch with the Retail Trust. I sent an email – and they were brilliant. After asking me a few questions about my situation, they arranged six telephone counselling sessions, which started within a week.

“My counsellor, Amy\*, just let me speak, talking through everything I’d been through and explaining how I felt. We talked about self-care and coping mechanisms to deal with stress and anxiety. Some of the techniques like meditation didn’t suit me, but breathing exercises and the Calm relaxation app really helped.

“Amy showed me the importance at looking at things from a different perspective, by reminding me things are never as bad as they seem. After being signed off sick from work, I had regular counselling sessions, with plenty of follow-up emails and returned to work nine weeks later.

“I’ve had a couple of wobbles, but I’m much better at coping with stress now, both in and outside work. I can spot the signs more easily and I find it easier to talk about my concerns.

“When you’re suffering from mental health issues it can feel difficult to ask for help. I can’t fully express how much the Retail Trust did for me. They keep everything completely confidential, and might be able to lift you from where I was – which is pretty much rock bottom – to where I am now, back at work and fully functioning.”

\*Name has been changed

**Chris Stoddart,**  
Stock controller

### Needs



Counselling support

### Input



£360

### Activities



Six sessions of short-term telephone counselling

### Outputs



Learnt self-care techniques and awareness of the signs of stress and anxiety

### Outcomes



Chris was able to return to work, with the confidence to perform his role, coping mechanisms for the future and an improved quality of life

### Total value created



£19,446

### SROI ratio



**£54.02**  
for every £1 invested

# Upskilling managers is crucial for a healthy workforce.

Between February and April 2022, we conducted in-depth qualitative and quantitative research across the retail industry. The research highlighted that managers are feeling the pressure and responsibility of helping to maintain the mental health of their team and working longer hours as a result, while receiving little support for their own wellbeing. Coupled with the steady rise in reported abuse and violence directed at people with customer-facing roles, it's not surprising that many working in retail are considering leaving the sector altogether.

Our belief that management training is at the heart of employee happiness holds true. Training and education are key to equipping managers with the skills and confidence to help deal with challenges. This training helps

to give an understanding of what they can do and to manage their boundaries, knowing when to step back and when to step in. We've continued to evolve our training to help meet the current challenges facing retail. All our training courses are CPD (Continuing Professional Development) accredited and, in direct response to the intolerance epidemic, we've developed a specific physical and emotional safety course to help retail colleagues deal with challenging situations.

We provided mental health and wellbeing training services for 3,870 managers and retail colleagues. Our training programmes gave £29.22 of social and economic value for every £1 spent, which speaks to the reach and positive impact that training managers and colleagues in wellbeing has on wider teams.





# “The Retail Trust is there to make sure everyone is thriving”

“I love this business. But, due to the pandemic, things have been pretty hard.

“[The Retail Trust] did some live talks with us, so our staff knew they were there, and that they could talk to them about anything, big or small, in confidence – whether that’s financial issues, anxiety, or simply coping day to day. Although it’s generally a lovely environment to be in, retail has its struggles, and it breeds passionate people with all sorts of different personalities.

“The Retail Trust recognises these issues, and is there to make sure everyone is thriving, from an introverted merchandiser to an extroverted buyer. It’s given people the confidence to come into work and say, ‘This is how I’m feeling, and I think that’s OK.’ I think it’s saved quite a few people I know from being in a bad place.

“Mental health and our people have always been a high priority at FatFace, and post-pandemic they’re even higher, which is a really good thing.

“We now have mental health ambassadors within the company, which we’re keeping now we’re back in the office. My team relies on me for good communication, and the pandemic has definitely altered my management style too – just being there for my team has been more important than ever.”

**Lisa Bray,**  
Menswear buying manager  
at FatFace

**Lisa Bray,**  
Menswear buying  
manager at FatFace



# “Our leaders gave overwhelmingly positive feedback”

“We offered the taking stock of wellbeing in retail course to our board, all of our area managers, and a selection of our senior leaders in our support centre in January of this year.

“It was fantastic working alongside Andrea and the team at the Retail Trust, as they have such experience and knowledge of their topic. This really does make all the difference when it comes to the trust and confidence we need to put in someone to deliver training such as this.

“Our leaders gave overwhelmingly positive feedback on the course. It really opened their eyes to some of the issues that our colleagues might be facing – and gave them some useful tools that allow them to deal with situations sensitively while not backing away from the issues. We’ve since taken up some further training from the Trust, because we were so impressed with the initial training, and now have nearly 50 wellbeing warriors in the business thanks to the Retail Trust team.”

**Peter Harris,**  
Learning and development partner  
at The Works



**Andrea Woodside,**  
Retail Trust Training Lead  
Speaking at the Retail Trust Leaders' Summit 2021



“We can enjoy time together while we're still a family of four.”

When the Centellas family received the devastating news that eldest son Berenguer's brain tumour was back and surgery was no longer an option, dad Jaume took leave from his customer service manager role at IKEA to spend as much time with the family as possible. →



## Wellbeing services – Jaume’s story

→ “On 26 July 2020 our eldest son Berenguer, now aged five, was diagnosed with medulloblastoma, a type of brain tumour. Just three days later he had brain surgery at Great Ormond Street Hospital (GOSH) and after analysing the cells we were informed it was type four, the most dangerous type.

“We started radiotherapy in September at the University College of London Hospital followed by chemotherapy at GOSH. In May 2021 the treatments ended and he started his recovery. The first few MRIs were very positive and we had great hopes his condition would continue to improve, he even started reception in the September. But in January 2022 the tumour was back and in force. Surgery was no longer an option, the only thing left was to start a new course of chemotherapy to try to give him as much quality time as possible.

“My wife Aida, the true rock of the family, was already on a career break, but with the sad reality of not being able to cure Berenguer I was signed off work with my salary secured until September. I started wondering what would happen long term as you never know with cancer. I looked online and decided to apply for some financial support. As a manager at IKEA I have been briefed about the Retail Trust and have recommended the Trust to co-workers especially during the pandemic so I knew there was help and support available.

“The process was easy to follow and smooth from the beginning. I filled in the online form and a few days later was contacted by Sue, who was so nice and empathetic to our situation. The Retail Trust has helped us with £1,000 towards our rent which has meant we’ve been able to do activities with the kids while it’s still the four of us and save some money to prepare for the uncertain future.

“Since his relapse Berenguer has gone through eight five-day cycles of chemotherapy. Whenever we’re not in hospital and he feels strong we take trips to the coast, explore forests or enjoy a film together. He’s a very funny boy with an amazing imagination. One of his favourite films is The Greatest Showman and he and his little brother Guifre recreate scenes from it in our living room. We love being together the four of us, even if it’s just going to Lidl to do the weekly shop, mundane things we unfortunately won’t be able to do forever.

“I hope no one has to contact the Retail Trust due to a similar situation to ours but for moments when stress is higher than usual or issues arise at work or in your personal life the Trust provides extra help. I would recommend the Retail Trust 100%.”

**Jaume Centellas,**  
Customer service manager at IKEA

### Needs



Financial support

### Input



£1,000

### Activities



Financial aid to help towards rent

### Outputs



Able to pay rent and save for an uncertain future

### Outcomes



Jaume was able to stop working and spend time with Berenguer with financial worries eased

### Total value created



£20,940

### SROI ratio



**£20.94**  
for every £1 invested

# Giving young people digital access to create future retail leaders

We are working with Qube Learning and retail partners to give disadvantaged young people a start in the industry.

While retail has always been a catalyst for social mobility, where people can progress from the shop floor to the boardroom regardless of their background, digital poverty is becoming a major barrier for many young people. Without basic digital skills, access to laptops and mobile

phones or even an internet connection, young people are being excluded from online learning opportunities and are unable to apply for jobs.

Where you start in life shouldn't determine where you end up, we work with training provider Qube Learning and retail partners to give disadvantaged young people a start in the industry. We've provided laptops for Qube Learning Kick Start centres, providing digital access for over 400 people in Bradford and Bolton, and supported 102 young people who've been through Qube Learning retail traineeships and apprenticeships by providing them with laptops.





“I’ve already done things I wouldn’t have dreamt possible”

“At school I struggled with basic academic tasks but it wasn’t until I entered further education that I was diagnosed with dyslexia and visual impairment and aged 18 was officially registered as blind. I studied to be a youth worker at university but when I graduated cuts to funding for youth work meant job opportunities were limited. Undeterred I started job hunting and landed a position at Millets.

“Over seven years I worked my way up to supervisor learning lots along the way but felt I lacked team leadership and management skills so when the JD Group highlighted their apprenticeship offering I snapped it up. I’d planned to use the computer facilities at my local library for my studies but the digital resources were removed due to the pandemic leaving me to study on a work computer when possible and my smart phone at home, which is particularly difficult being registered blind.

“I talked to Qube Learning about my situation. I was delighted to receive a laptop from them as part of their partnership with the Retail Trust to help combat digital poverty. This has already helped with my apprenticeship and will continue to support me and my career going forwards.

“The confidence boost from enrolling on the apprenticeship is amazing, I’ve already done things I previously wouldn’t have dreamt possible – I’m thoroughly grateful for the support I have received and can’t wait to see what the future holds.”

**Adam Bestwick,**

Team leader supervisor apprentice at Millets

“Through working with the Retail Trust we have been able to **create career opportunities for young people who would have ordinarily struggled** due to gaps in knowledge, skills and digital access. The Retail Trust has provided **102 young people with laptops, giving them the opportunity to gain qualifications and take the next steps in their careers.**”

**Paul Taylor,**

Employability skills director at Qube Learning

**Needs**



Access to a computer in order to study

**Input**



**£188**

**Activities**



Provision of a laptop

**Outputs**



Able to study for an apprenticeship at a time and location to suit

**Outcomes**



Through his apprenticeship Adam has gained team leadership and management skills to further his career in retail

**Total value created**



**£3,281**

**SROI ratio**



**£17.45**  
for every £1 invested

# Creating happy homes.

## Our supported living estates continue to deliver industry leading support.

Our five supported living estates across the UK in London, Derby, Glasgow, Liverpool and Salford provide a much-needed safe haven and happy community for more than 450 residents. We have built communities where the over 55s can thrive, maintain their health, retain their independence and get help when needed.

With access to the latest smart home technology in our digitally-enabled properties, our residents are able to fully enjoy the highest quality of life in their later years.

The outstanding teams on our estates have continued to deliver industry leading support, generating £13.2 million in SROI, with an increase of 36% year on year, across our

supported living and extra care properties. We have 102 extra care properties across three of our estates. Our extra care properties are a great alternative to residential care for those who don't require 24-hour nursing care and enable people to live in their homes with many of the facilities of residential care on hand including care staff, a restaurant service and communal facilities where a range of activities are provided.

We have commenced the refurbishment of Marshall Hall, a beautiful listed building on the Marshall Estate in London, to create ten new smart flats with works due for completion in December 2022. This will increase our digitally-enabled homes to 56 across our retirement estates. Smart-home technology has been life-changing for residents. Voice-activated heating and lighting gives residents control over their lives and a greater sense of independence which has a profound effect on wellbeing levels. We have also provided Alexa devices for all

residents across our estates who have access to broadband. These have been invaluable, allowing residents to very easily keep in contact with family, friends and also the support teams on site.

We have started the refurbishment of our older housing stock at the Hugh Fraser Retirement Estate in Glasgow, to ensure the flats meet our residents' needs.





## Supported living



**Doris Jackson,**  
102 year old resident,  
Marshall Estate

### Needs



Quality homes for retail retirees;  
a safe and welcoming community;  
healthy ageing and independence;  
high quality of life in later years

### Input



**£3,221,684**

### Activities



Marshall Hall refurbishment  
to create ten new flats;  
refurbishment of older housing  
on Hugh Fraser Retirement  
Estate; continued rollout of  
smart home technology

### Outputs



Voice-activated heating and  
lighting, video calling and  
passive monitoring allow  
residents to live safely and well  
for longer in their own homes

### Outcomes



Safe and supportive  
community that promotes  
independence and healthy  
ageing and the highest  
quality of life in later years

### Total value created



**£13,273,241**

### SROI ratio



**£4.12**  
for every £1 invested



“I have my independence but help is there when I need it.”

Jean, who lives in one of our extra-care flats, moved to the Leylands Estate over 20 years ago and has lived in three different properties as her needs have changed. →

## Needs



Extra care accommodation as needs have changed

## Input



£9,279

## Activities



Enhanced level of accommodation and services available

## Outputs



Increased independence through access to support and care services on site

## Outcomes



Jean has been able to maintain friendships in the community she has grown to love, while receiving the care and support she needs

## Total value created



£71,437

## SROI ratio



**£7.70**  
for every £1 invested

# “I’m so proud of where I live.”

→ “Back in the late 1990s a friend asked me to come with her to take a look at the Leylands Estate. I was living in a flat in Derby city centre and it was awful, ever so frightening. My doorbell would ring and there would be menacing youths outside causing all sorts of problems. When I first saw the estate I thought, ‘I want to live here,’ it’s so beautiful. I’d worked at Debenhams and then Bennetts in Derby for decades so I was eligible for a place.

“I can’t believe I’ve lived here for 20 years, it’s flown by. I was still working part-time when I first came here and lived in a flat, then 15 years ago I moved into a lovely cottage just off the main drive. Sadly I had to have a leg amputation which meant I moved to a flat in Cedar House which offers extra care. Having the extra care on site was a big relief, it meant I could get care when I needed it but still have my independence.

“I’m 83 years old on my next birthday but living here means I can still do my own cooking, washing and ironing. I have all of my Crown Derby up on the walls and in china cabinets. I’m so proud of where I live. I tend to stay in my flat now, but come out when I want to. There’s a coffee morning every week and the hairdressers is down the corridor. It’s wonderful to have it so close and they cater for me in my wheelchair.

“I have a morning call with the support team, which I really like. It’s company, even if just for a minute, and it’s reassuring when I’m not managing so well. The staff don’t come over interfering or intruding, but when I’ve needed them they’ve always been here for me. It’s such a pleasure to live here – the estate looks just the same as when I first visited. I couldn’t think of anywhere better to live.”

**Jean,**  
Resident at the Leylands Estate



“I am treated  
as a **person**  
**with value** for  
once in my life.”

Charles moved into his flat in the Hugh Fraser Retirement Estate at the beginning of 2020. He'd been living in a bedsit where he slept on a sofa and, due to antisocial behaviour in the local area, felt too afraid to leave his flat. →





→ "I suffer from severe mental health issues. Before I moved to the estate my mental health was deteriorating and I tried to take my own life on a couple of occasions. My previous place was a bedsit, it only had room for a couch, which I slept on for six years. I didn't feel safe to leave the flat as there was gang violence and drug dealers in the area.

"One day I got a visit from my community psychiatric nurse who told me about some new flats for people who have worked in the retail industry. Although I haven't worked in retail myself my sister, who is my main carer, worked for B&M and Sports Direct.

**"I was nearly in tears. I felt like I'd won the lottery and my mood lifted straight away."**

"The nurse contacted the estate manager and got a date for me to view a flat.

"I thought it would be a bedsit in another area with the same problems. When I saw the flat I couldn't believe my eyes, I was nearly in tears. I felt like I'd won the lottery and my mood lifted straight away.

"The building wasn't finished so I didn't have a tenancy agreement or a date to move in but I was assured my name was on the flat. I phoned up every day to make sure it was still there for me. The support and reassurance I got from the team was fantastic, I was treated with respect and as a person with value for once in my life.

"Since moving to the Hugh Fraser Retirement Estate my mental health has improved. I still have times when I feel down and depressed but then I look around, see where I am living, and feel better. The staff are a great support to me, they stop by my flat to have a chat and see how I am doing which means a lot to me. I've never felt so safe and secure in my whole life."

**Charles,**  
Resident at the Hugh Fraser Retirement Estate

### Needs



A safe environment and support when needed

### Input



£6,853

### Activities



Provision of a new flat with smart home technology

### Outputs



Smart home technology to control heating and lighting and instant video calling with staff, friends and family promotes independent living and connectivity

### Outcomes



Living in a safe environment has had a big impact on Charles' mental health as he now feels safe and secure with staff around him to provide support when needed

### Total value created



£15,782

### SROI ratio



**£2.30**  
for every £1 invested

# Here's to a **happy, healthy and hopeful 2023.**



**Chris Brook-Carter**  
Chief Executive Officer

The growth of the Retail Trust's impact over the past 12 months is nothing short of phenomenal.

Over 270,000 retail colleagues reached out for help and we have been there to guide them through their toughest moments via our 24-hour helpline, counselling sessions, critical incident support, financial aid, supported living and digital self-help services.

Retail is not an easy place to be in 2022 and the need for our services speaks to the incredible pressures on those that work in retail have faced

in the last year. Aggressive customer behaviour is on the rise, the ongoing cost-of-living crisis is having a huge impact on mental health and managers feel ill-equipped to support their teams. In short, many of our colleagues are struggling.

**"Everyone has a right to be able to access the support"**

We, at the Retail Trust, believe everyone has a right to be able to access the support, tools and education they need to live happy, healthy lives, not just those who can afford such things. The evidence linking colleague wellbeing with a thriving business is irrefutable and the upside of the challenges facing the industry is that there has been a profound and positive effect on the sector's approach to mental health and wellbeing. →



**Chris Brook-Carter**  
Speaking at the Local Data Company's Retail and Leisure Trends Summit

# | ‘270,000 colleagues reached out for help’

→ By joining forces, we can continue to tackle the issues facing the sector. Recognising that together we are better, Retail Trust leads a coalition of retailers who are committed to taking a collective approach to solving industry-wide challenges. With the aim to re-establish retail as a people-first sector by putting the health of our people at the centre of how we operate and creating a blueprint for the future of retail to ensure our sector and its people thrive.

**“But we can’t do it without your help.”**

Increasingly we want to make sure we’re addressing the causes of poor workplace health and wellbeing, not just treating the symptoms. By putting clear holistic and empowering wellbeing strategies in place, we can take a preventative, rather than reactive, approach. Engaging with colleagues at every level we really can have a seismic impact on our colleagues and their communities.

But we can’t do it without your help. Partnering with the Retail Trust, whether that’s through offering our wellbeing services, fundraising, volunteering or attending events, ultimately shows the sector’s support and commitment to looking after its people. This ensures that those most in need have been able to access our mental health support services, financial aid and digital poverty solutions. Plus, it has enabled us to provide safe, independent homes for former retail workers through our residential retirement arm.

Thanks to your help we have been able to start refurbishment work on Marshall Hall – a listed building on our supported living estate in London – and the older housing stock on our Glasgow estate. We have tackled issues such as digital poverty by providing young people with laptops to enable them to have access to opportunities in the retail industry. And we have continued to expand our suite of training courses to answer the challenges faced by our retail

colleagues, adding a physical and emotional safety course in response to the intolerance epidemic.

190 years ago, our founder Thomas Helps set out his vision for an organisation that would ‘promote the happiness and interests’ of those working in this sector. Ever since then, everybody who works in retail has had a place to turn in difficult times.

Like any organisation that has survived for almost two centuries, the Trust has adapted and evolved. The challenges faced by retail colleagues today could never have been foreseen by our founder, but the Trust’s mission to create a happy, healthy and hopeful workforce remains as relevant as ever.

**Chris Brook-Carter**  
Chief Executive Officer







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