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Women @ work 2022

Second year of the report Women at Work: A Global Perspective.

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Women @ work 2022

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Global Life Sciences Outlook 2022

Digitization at scale: fulfilling the promise of science

Women @ work 2022

In its second year, our Women at Work: A Global Perspective report aims to better understand how women's engagement and development are affected by experiences in their professional workplace.

The report provides a unique insight into the situation of working women, and shows a worrying long-term impact, with respondents reporting widespread burnout.

The past year ushered in a period of change for many companies and employees, which brought both opportunities and challenges. Many employers have worked hard to take what they learned during the first year of the pandemic and combine it with more traditional ways of working (including implementing hybrid work models).

Yet responses from 5,000 women in the workplace in 10 countries make it clear that the pandemic continues to take a heavy toll on women: burnout, for example, has reached considerably high levels.

At the same time, many women have made professional and life decisions driven by their experiences during the pandemic; For some, this has meant

seeking new and more flexible work patterns; for others it has meant leaving their employer or the workforce altogether.

Relevant aspects

Widespread burnout fueled by rising stress levels

53% of women surveyed say their stress levels are higher than they were a year ago, and almost half feel burned out. While this year's respondents rate their mental wellbeing as slightly better than last year's, almost half say their mental health is poor/very poor.

The great resignation is set to continue

Women are more likely to be looking for a new role than they were a year ago, and burnout is the top driving factor: Nearly 40% of women actively looking for a new employer cited it as the top reason. More than half of women want to leave their employer in the next two years, and only 10% plan to stay with their current employer for more than five years.



Despite widespread shifts in working arrangements, flexibility is not a reality for many woman

Although women are slightly more likely this year than in 2021 to say that their employer offers flexible working policies, the number is still low: just 33% of woman say their employer offers this.

Hybrid work: an opportunity for change, but there are challenges.

Si bien la forma híbrida de trabajar presenta oportunidades, que incluyen, si se hace bien, permitir que muchos mantengan la flexibilidad que puede permitirse el trabajo remoto, también crea un riesgo de exclusión para aquellos que no están físicamente presentes.

Bullying and microaggressions are on the rise and often go unreported.

The majority of women (59%) have experienced harassment and/or microaggressions in the last year at work, a number that has increased since our 2021 report (52%)

Inclusive and caring organizations gain a competitive advantage.

Women who work for these companies report much higher levels of engagement, confidence, and job satisfaction, as well as more positive experiences with hybrid work and lower levels of burnout. They also plan to stay longer with their employers.

Our recommendations

While there are myriad policies that should be put in place, this research points to five fundamental issues that employers who wish to make progress on gender equality should address.

1. Address the burnout epidemic
2. Make mental wellbeing a priority
3. Make flexible working work for women
4. Approach hybrid working with inclusion and flexibility
5. Instill a truly inclusive culture

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Global Life Sciences Outlook 2022

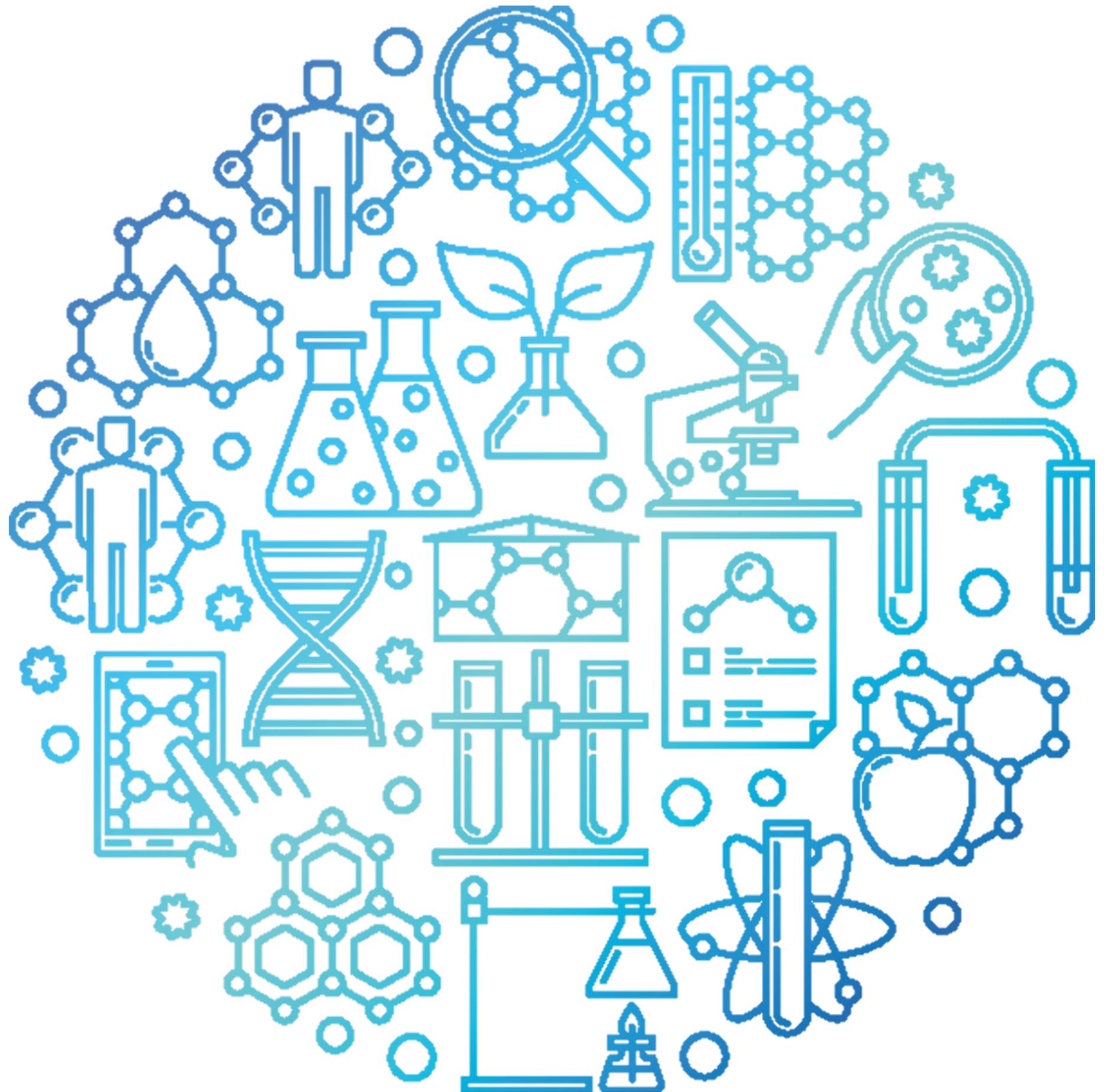
Life sciences companies face various challenges due to the leading role they play in drug prices and access to them, and during the pandemic this role was highlighted.

While valuations for the life science sector in this past year have been mixed, the underlying performance and outlook for the sector is healthy. We saw many companies' growth buoyed by COVID-19 therapeutics, and the majority of others remaining fairly immune to some of the pandemic impacts initially (e.g., slowdown in patient recruitment and trial execution). We anticipate further growth in the industry as life sciences companies continue to transform.

Some companies, especially those with limited legacy ways of working, are coming out of the pandemic adopting a digital-first model and challenging norms across their enterprise. Those that made significant digital investments prior to the pandemic are benefiting from their bold vision as digital transformation accelerates every

part of the life sciences value chain. In 2022, visionary leaders will continue to drive investments focused on long-term, strategic digital objectives - using automation, smart factories, and artificial intelligence to transform manufacturing and using new technologies to build supply chain resilience.

Change will persist through 2022 and beyond. Many life sciences companies have experienced growth and are emboldened with stronger balance sheets from which to invest. We anticipate investments in their portfolios, including next generation therapies and investments, to capitalize on their digital progress. With access to a myriad of tools to gather and analyze data, it's time for life sciences companies to employ digitalization at scale.



Accelerating R&D productivity and industry collaboration

Driving productivity, a need for speed

Currently, many life science companies are showing a 'need for speed' as their focus is on driving research and development (R&D) productivity. New processes adopted to expedite vaccines and therapeutic products to tackle COVID-19 are now being applied to other drugs. In 2022, pressures are expected to be on optimizing processes to fundamentally change the drug development paradigm.

Transforming the patient experience

Patients at the center, taking charge of their health

The pandemic put patients at the center of every conversation, and innovation was

catalyzed. Over the last two years, collaboration across life science and with stakeholders was unprecedented - all mobilizing in the interest of patients.

Communication between patients, sites, sponsors, and supply partners increased. As of 14 December 2021, sponsors are enrolling or have enrolled more than 90 million people in 775 COVID vaccine-related clinical trials, including 50 million estimated for a post-marketing safety study for the Moderna mRNA-1273 vaccine.

Transforming the talent experience

Massive shifts in talent models

Successful companies are no longer concentrating on just hiring the smartest people, but rather on having access to the

smartest people. New workforce ecosystems include in-house employees combined with a diverse mix of external contributors - e.g., contractors, app developers, other gig workers, external partners and suppliers, and even software bots. According to recent research from MIT Sloan Management Review and Deloitte, only 28% of global managers feel they are sufficiently preparing to manage a workforce that will rely more on external participants.

Regulatory: Mastering external forces
TSeismic changes in the life science regulatory landscape

Responses to the pandemic varied by country but still drove significant, broad-reaching change in the regulatory landscape. Public and private-sector actors engaged in wide-scale collaboration, cooperation, and information sharing. Research and regulatory processes were digitalized and accelerated and may never be the same again.

The digital enterprise at scale: A CEO imperative for 2022

Digital becomes our reality

A recent Deloitte and Fortune report shows that 77% of CEOs across 15 industries say the COVID-19 crisis accelerated digital transformation, and CEO optimism about the year ahead remains strong. The digital transformation trend is expected to accelerate in 2022 with a renewed drive towards more long-term strategic digital objectives.

Future-proofing manufacturing and supply chains

Scaling smart factory transformation

In 2022, more life science organizations are scaling smart factory capabilities to boost agility. Biopharma and medtech companies are investing in fully digitizing and integrating information technology (IT) and operational technology (OT) capabilities in manufacturing. As smart factories scale, manufacturing organizations are looking for ways to:

- Improve performance
- Make data integration sustainable
- Upskill workers' digital and data skills
- Transform infrastructure and culture
- Minimize cyber risk

Environmental, Social, and Governance (ESG): Another CEO imperative

Materiality, measuring what matters most

Materiality for life sciences: materiality in ESG defines what is important to stakeholders as well as what is important for business success. Leading material factors for the life sciences sector include:

- Environmental sustainability, making medicines more sustainable and reducing greenhouse gas emissions, in particular, Scope 3 emissions of a company's supply chain.
- Drug pricing - balancing the need for innovation with the needs of policymakers - and the broader effect from new ESG regulations.
- Access to medicines globally and supporting innovation in medicines and treatments with the greatest need.
- Health and race equity, including enhancing diversity in clinical trials.
- Diversity in leadership and income equality, including a gender pay gap in scientific research and the pharmaceutical industry.

Startup leading medtech

Deloitte teamed up with MedTech Innovator (MTI) to look through the lens of 1,000 medtech innovators participating in MTI's global accelerator program in 2021. These startups are developing a new class of digitally-enabled technologies - including Software as a Medical Device (SaMD), bespoke algorithms, wearables, and other connected devices. About 70% of their technologies include a digital-health component, and nearly 30% that identify as digital say they employ artificial intelligence (AI) and machine learning.

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