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2023 LGBT+ Inclusion @ Work Survey

Country profile: India

Key global findings:

Organizations have considerable scope to do more to demonstrate their commitment to LGBT+ inclusion. Many LGBT+ employees feel uncomfortable being out in the workplace and face non-inclusive behaviors. And when LGBT+ employees feel that their employers aren't doing enough to support LGBT+ inclusion, many are prepared to look for a new employer.



One-third of respondents are looking to move to a more LGBT+ inclusive employer. This is even higher for ethnic minority respondents, with over half currently looking for a new role. When it comes to choosing their new employer, what matters most to respondents is seeing a diverse workforce.



Being out at work is important for many, yet less than half are out with all colleagues. Less than half of respondents feel comfortable being out with all of their colleagues, and another one-third of respondents say that they are only comfortable being out at work with select colleagues.



Concerns about being treated differently keep many from being out at work. Other factors, including concerns about personal safety, facing discrimination or harassment, and a preference not to discuss their private life at work, play a role with reasons varying by sexual orientation and gender identity.




Comfort being out decreases when it comes to being out with direct managers. Just under 60% of those who are out about their sexual orientation, and 54% of those who are out about their gender identity are comfortable being out with their closest colleagues, while only 37% are comfortable being out with their direct managers.



Allyship and role models increase comfort in being out. Allyship plays a part when it comes to comfort in being out at work, with many who are out at work to at least some colleagues saying that allyship helps them to be out. Comfort being out about also increases with the presence of LGBT+ role models.



Non-inclusive behaviors are being experienced at work. Four in 10 respondents (42%) have experienced non-inclusive behaviors at work and many say they are certain it is a result of their sexual orientation or gender identity.



Methodology

The Deloitte Global LGBT+ Inclusion @ Work study is a global survey of 5,474 (non-Deloitte) LGBT+ employees that took place between January and February 2023 via online quantitative interviews and one-to-one in-depth qualitative discussions.

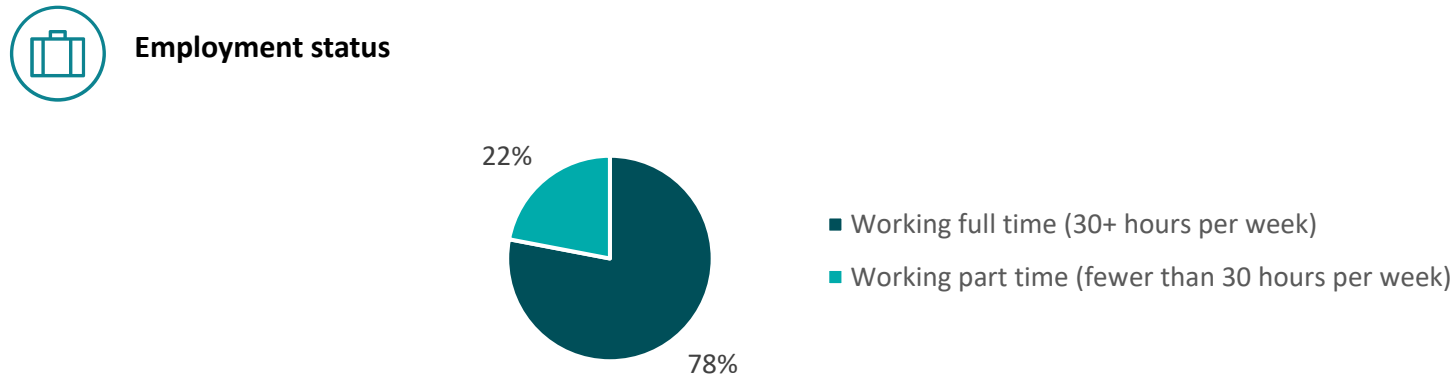
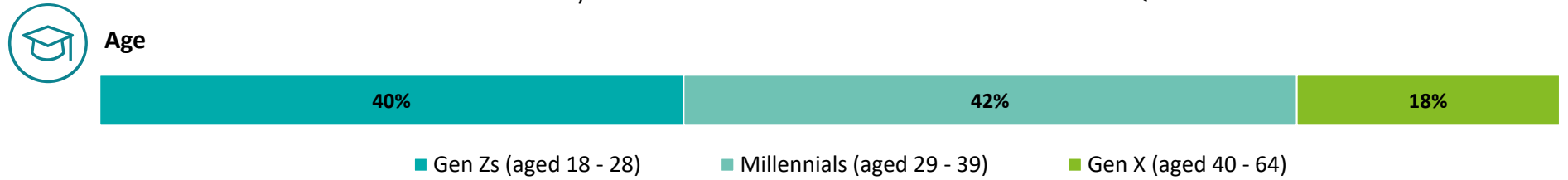
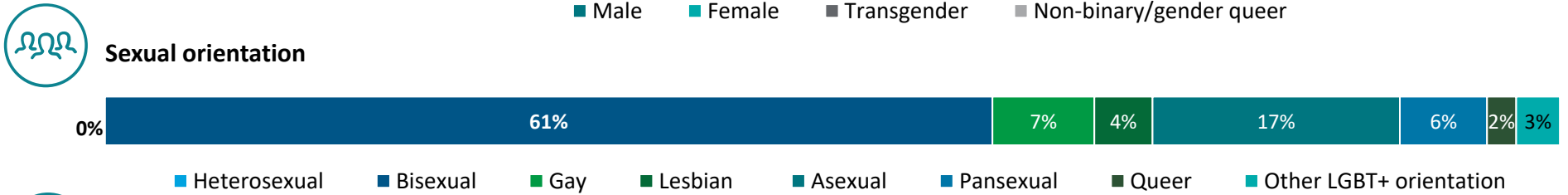
Countries surveyed: Australia, Brazil, Canada, China, France, India, Japan, Mexico, the Netherlands, Poland, South Africa, the UK, the US.

The following deck examines how **India's LGBT+ employees** stand out from their global counterparts on these key themes.

* LGBT+ was defined for survey respondents as the following: The LGBT+ acronym (which stands for Lesbian, Gay, Bisexual, Transgender and more) is used throughout this survey for consistency and includes anyone who does not identify as heterosexual and cisgender. Deloitte professionals were not polled as part of this survey. * We recognize that coming out is often an ongoing process rather than a single moment. For the purposes of the report, the phrase 'out at work' is intended to mean that people would be comfortable disclosing their gender identity or sexual orientation to colleagues should the opportunity present itself. *Gen Z is defined as born between 1995 – 2005, millennials as born between 1983 – 1994, and Gen X as born between 1967 – 1982

Country profile: India

- 445 total respondents in India, 82% gen Zs or millennials, and 18% aged 40+. Almost eight in 10 are full-time workers.
- 6% of respondents identify as transgender or non-binary/gender queer. Around six in 10 respondents identify as bisexual, 7% as gay and 4% as lesbian, while 17% identify as asexual.



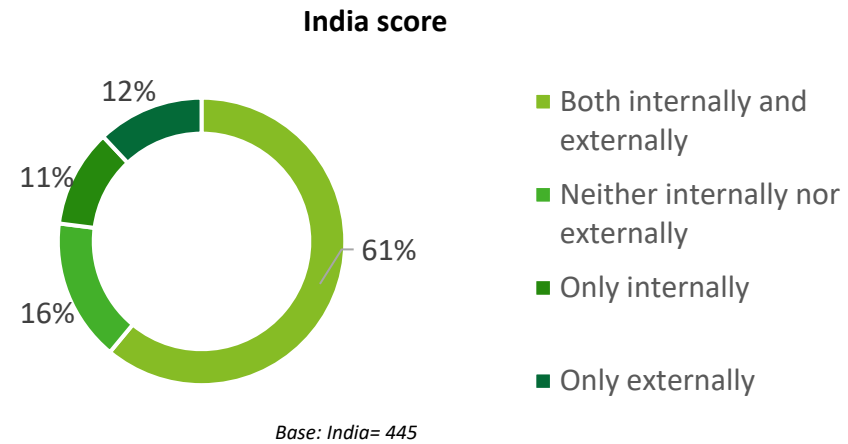
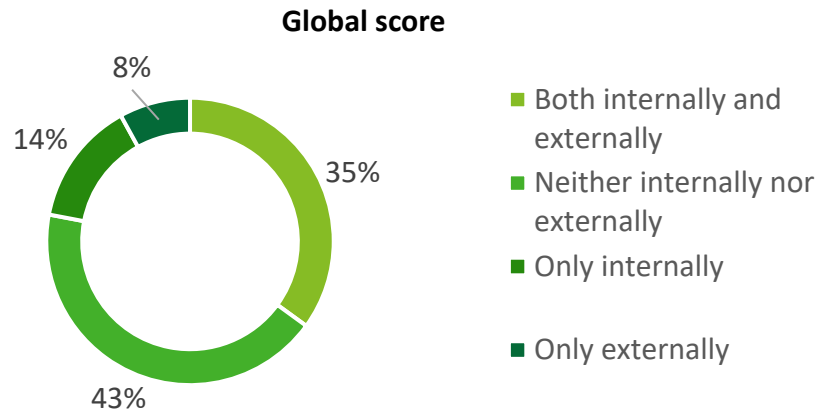
* Charts exclude don't know/prefer not to answer/unsure responses
 ** Due to rounding, percentages may not always add up to 100%

Examining employers' commitment to LGBT+ inclusion

- Just over 60% of Indian respondents work for an employer that demonstrates commitment to LGBT+ inclusion both internally and externally, compared to 35% globally.
- Talking externally about the importance of LGBT+ inclusion is the most common way respondents say that employers externally demonstrate their commitment. The next most common commitments reported are membership of an external LGBT+ advocacy organization and signing up to UN standards – the least typical actions globally.



Percentage who say their employer demonstrates commitment to LGBT+ inclusion...



Where there is external commitment, what does it look like?

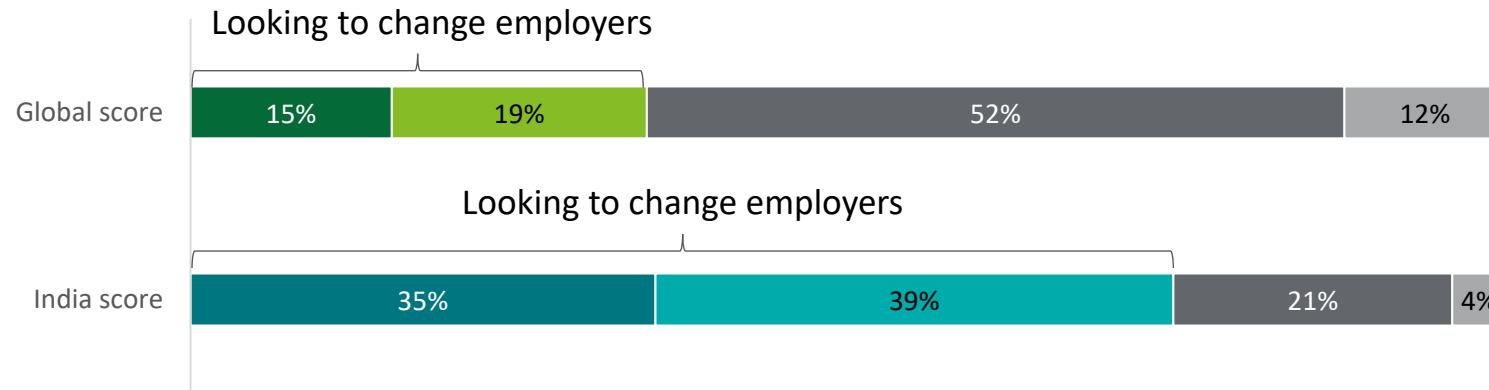


LGBT+ inclusion influences job loyalty

- Almost three-quarters of Indian respondents say they are looking to change employer to find a more inclusive organization – more than double the global average.
- There are very few LGBT+ employees in India who “don’t know” the answer to this question, compared to more than one in 10 respondents globally.



Percentage who are actively looking to change employers to find an organization which is more inclusive of LGBT+ employees



- Yes, because my employer doesn't focus on LGBT+ inclusion at all
- Yes, because my employer's actions on LGBT+ inclusion have not been enough to have a positive impact on me
- No
- I don't know

Base: Global= 5474, India= 445

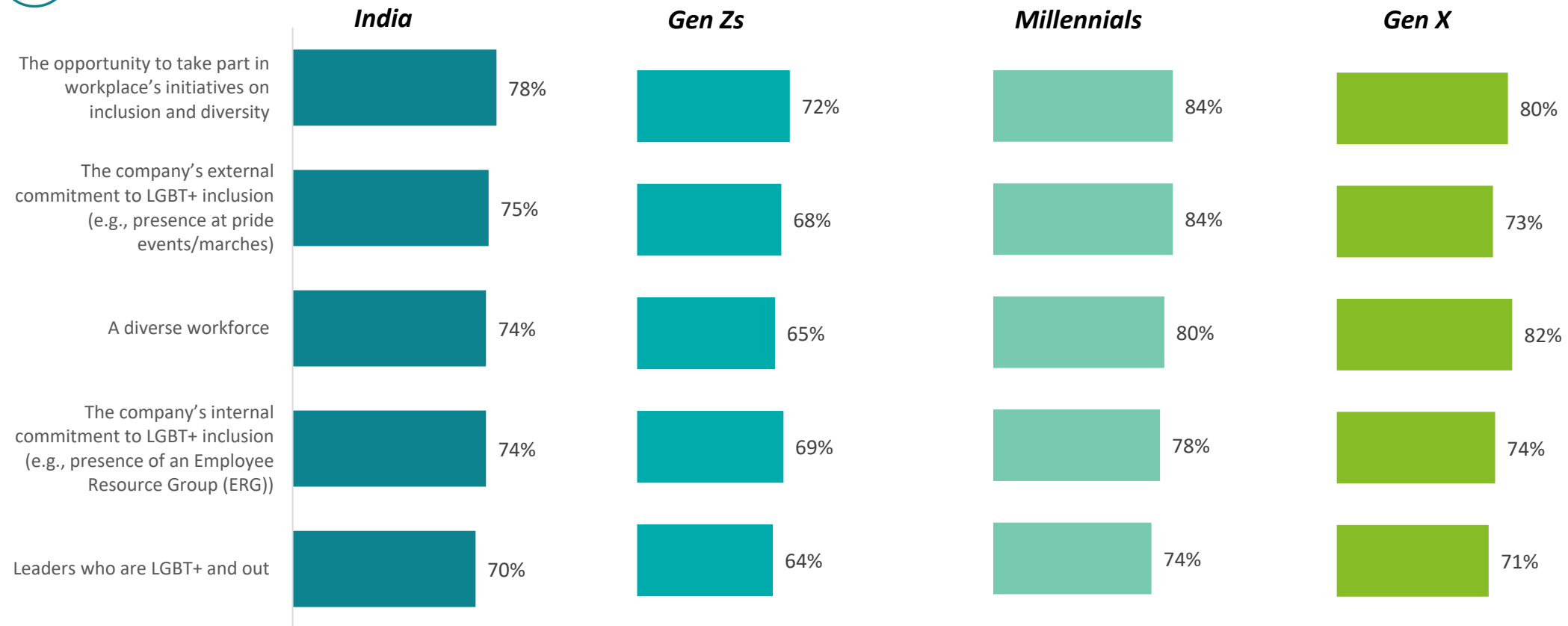


Top factors for LGBT+ respondents when considering a potential employer, and the generational divide

- Almost eight in 10 respondents in India consider the opportunity to take part in workplace inclusion and diversity initiatives the most important factor when applying for a new role.
- Leaders who are LGBT+ and out is the least important consideration across generations.



Top factors when applying for a new role:



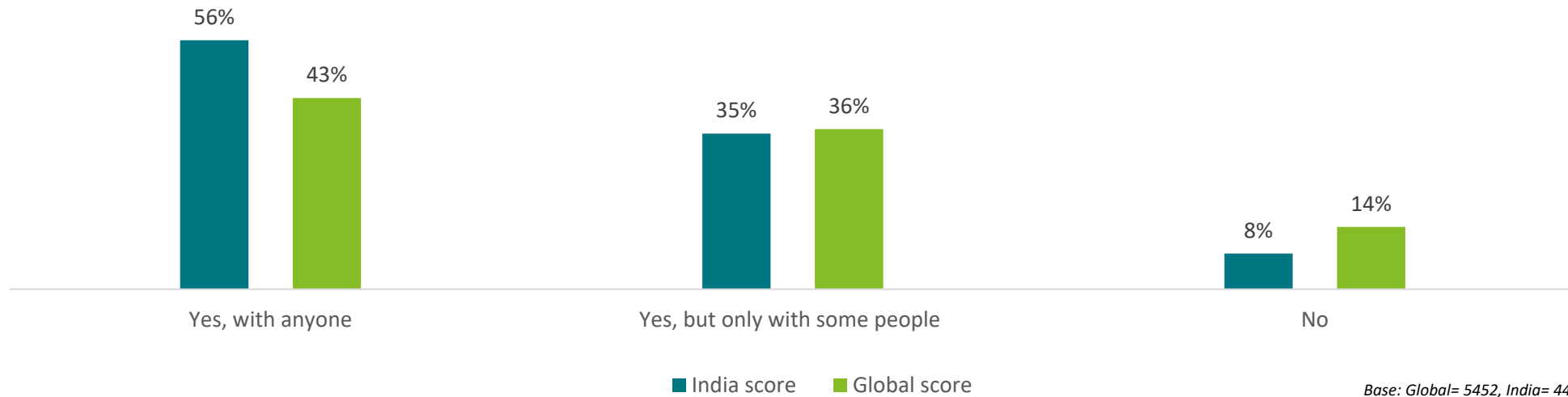
Base: India = 445, Gen Zs = 179, Millennials = 187, Gen X = 79

Level of comfort being out at work

- More than half of Indian respondents are comfortable being out about their sexual orientation with anyone at work – above the global level.
- Only 8% of LGBT+ employees in India are not out about their sexual orientation at work with anyone, compared to 14% globally.



Level of comfort being out at work about my sexual orientation

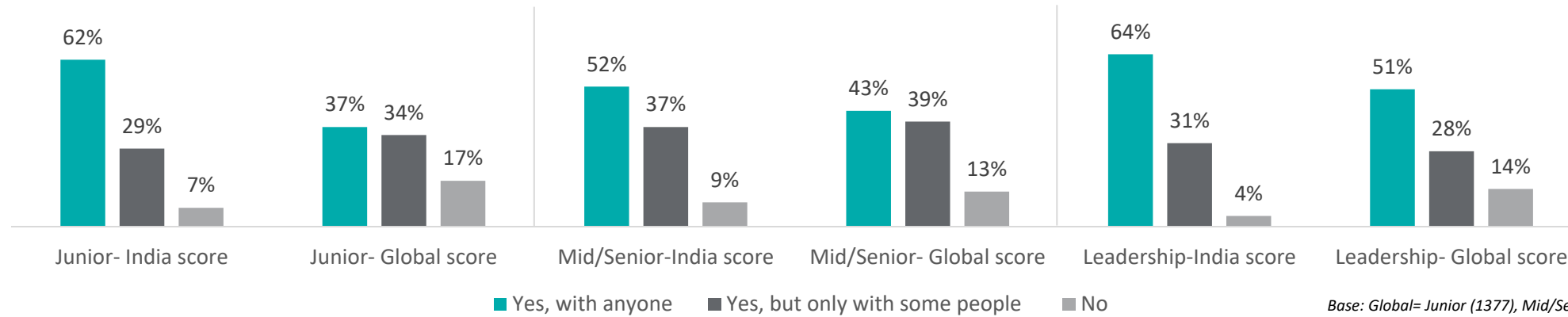


How seniority and allyship impact comfort in being out at work

- In contrast to the global picture where comfort with being out increases with seniority, LGBT+ employees at the most junior and senior levels in India are out about their sexual orientation to a similar degree.
- Allyship plays an important role in helping people with being out about their sexual orientation at work, according to those who are out, both in India and around the world.



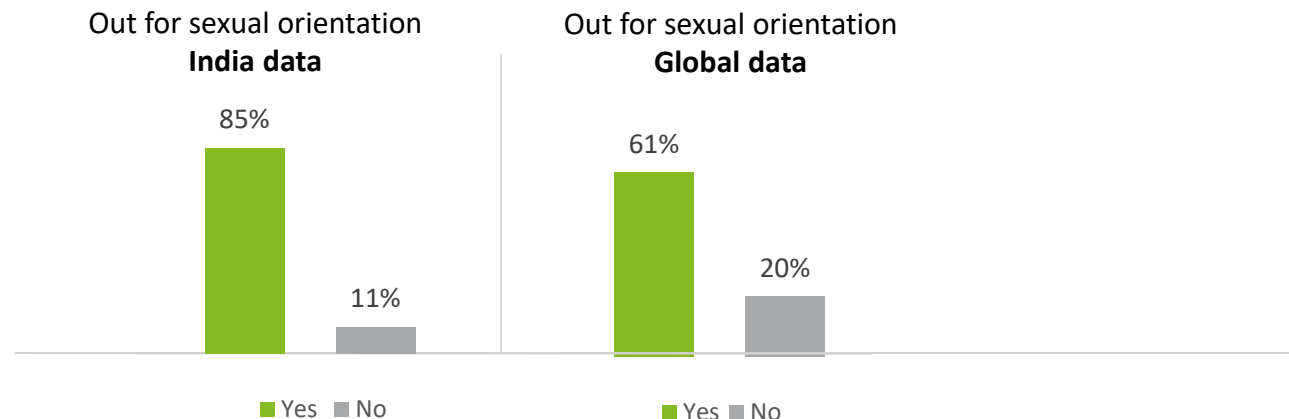
Level of comfort being out at work about my sexual orientation by seniority



Base: Global= Junior (1377), Mid/Senior (3195), Leadership (880)
 India = Junior (93), Mid/Senior(278), Leadership(73)



Does allyship help with being out?



Base: India = Out for sexual orientation (403), Out for gender identity (21)* number too low for analysis

Base: Global = Out for sexual orientation (4300), Out for gender identity (439)



Exploring which groups respondents are most comfortable being out with regarding their sexual orientation

- Indian respondents follow the same trend as the global average in feeling most comfortable disclosing their sexual orientation with close colleagues, followed by HR and direct managers.
- In contrast to the global picture, respondents in India are more likely to be comfortable being out and open with their clients/customers (43% vs 21% globally).



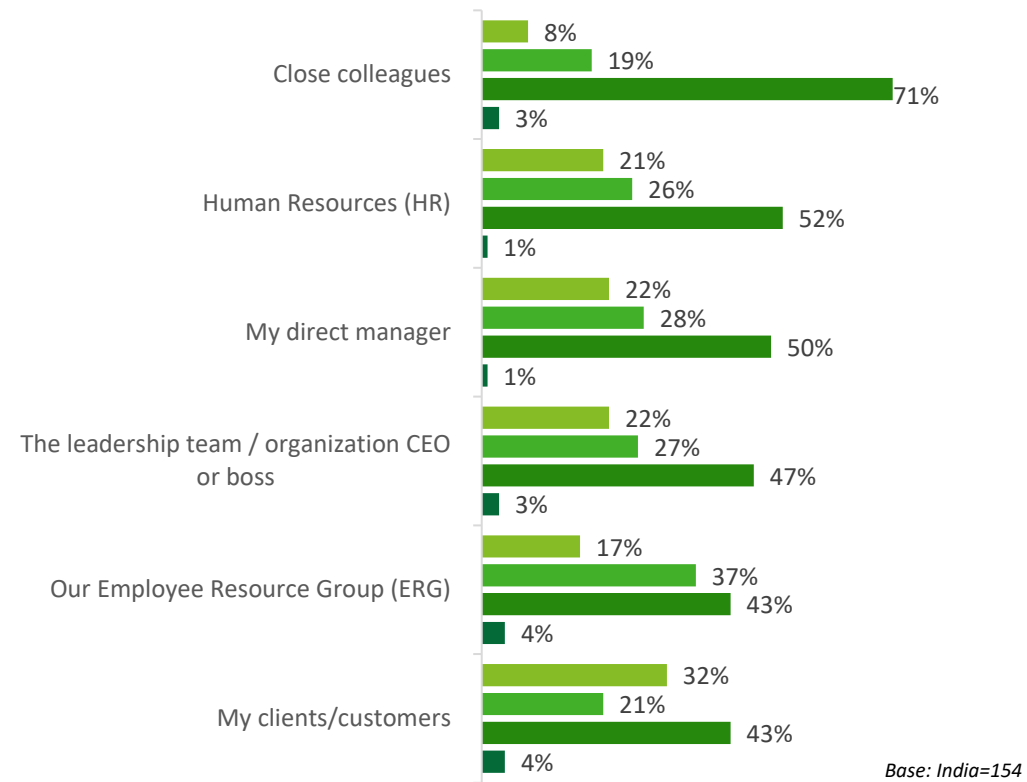
Level of comfort being out at work about my sexual orientation with different groups - **Global score**



■ I am uncomfortable and avoid it
■ I am uncomfortable but trying to be more open
■ I am comfortable and open
■ Doesn't apply



Level of comfort being out at work about my sexual orientation with different groups - **India score**



■ I am uncomfortable and avoid it
■ I am uncomfortable but trying to be more open
■ I am comfortable and open
■ Doesn't apply



What is preventing respondents from feeling comfortable being out?

- Just over four in 10 Indian respondents cite concern about career opportunities as the biggest barrier to being out about their sexual orientation at work.
- Around one-third of LGBT+ respondents in India say concerns about their personal safety are a barrier to being out about sexual orientation, compared to 19% globally.




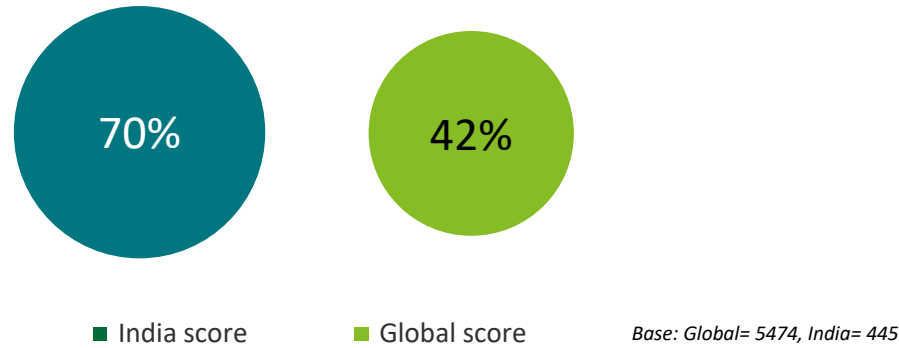
Barriers to being out about sexual orientation at work




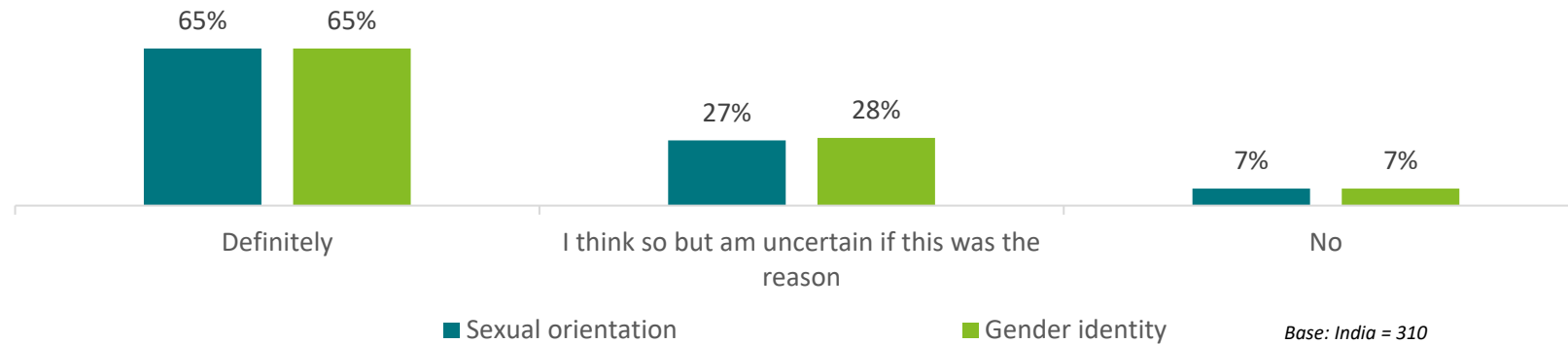
Experience of non-inclusive behaviors

- LGBT+ employees in India are more likely to have experienced non-inclusive behaviors than the global average: 70% vs 42% globally.
- Two-thirds of Indian respondents believe these experiences were definitely because of their sexual orientation or gender identity.

 Those who have experienced non-inclusive behaviors



 People that believe they experienced non-inclusive behaviors because of their LGBT+ identity – **India score**

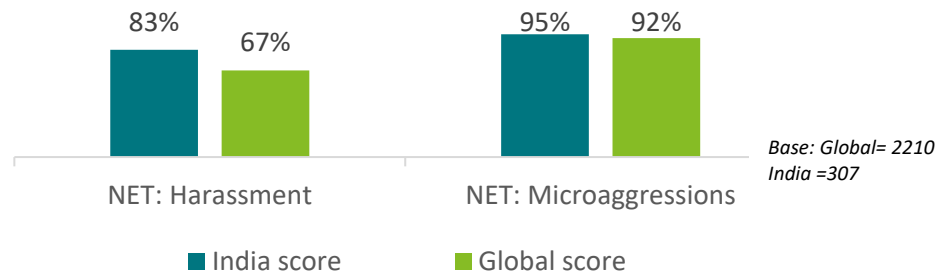


Types of non-inclusive behaviors experienced

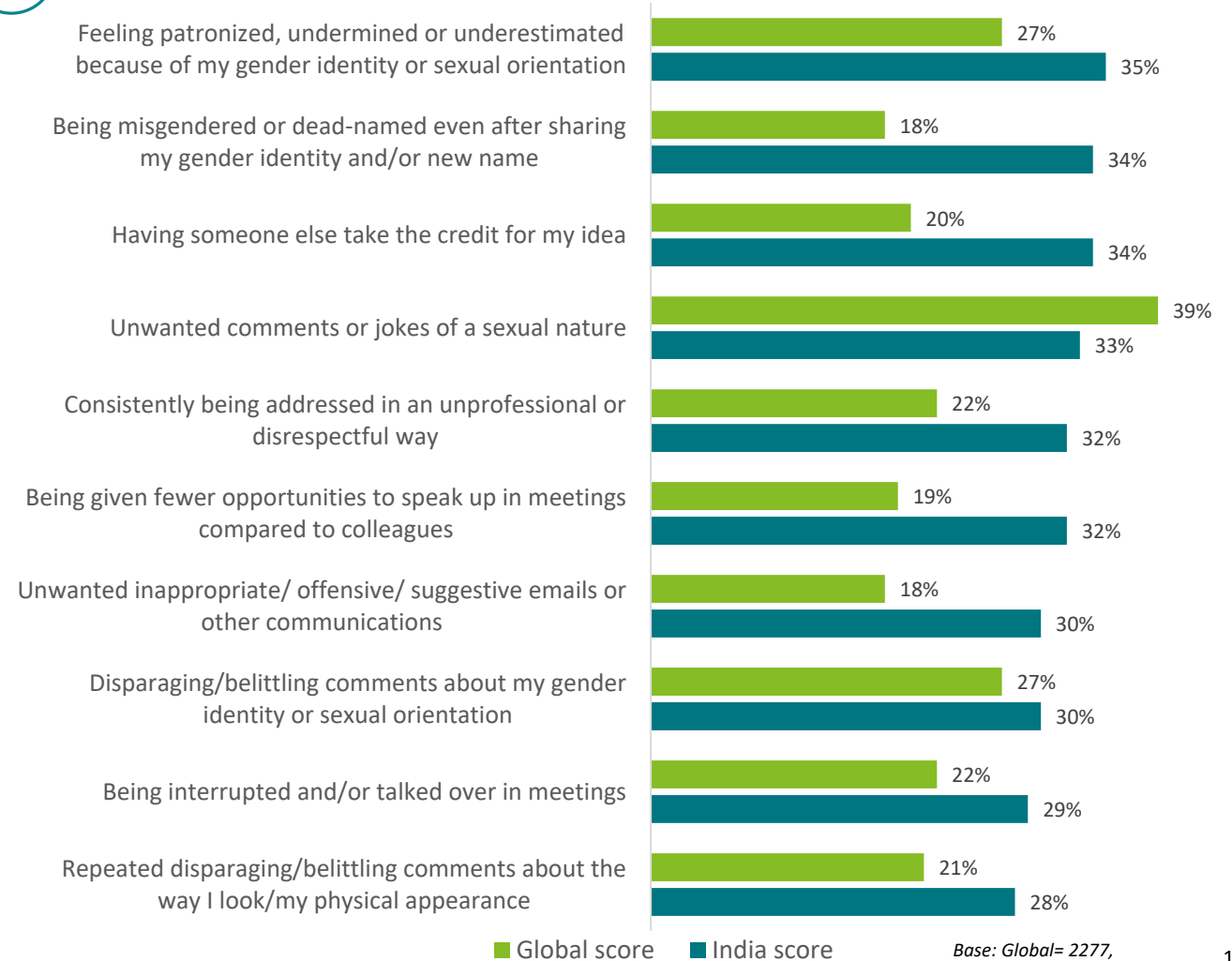
- Micro-aggressions are more common than harassment amongst those who have experienced non-inclusive behaviors in India and around the world. However, harassment is more frequently experienced in India than globally (83% vs 67%).
- In India, the most common form of non-inclusive behavior is feeling patronized, undermined or underestimated because of one’s gender identity or sexual orientation. Globally, the most common experience is receiving unwanted comments or jokes of sexual nature.



Types of non-inclusive behavior



Top 10 most common forms of non-inclusive behaviors



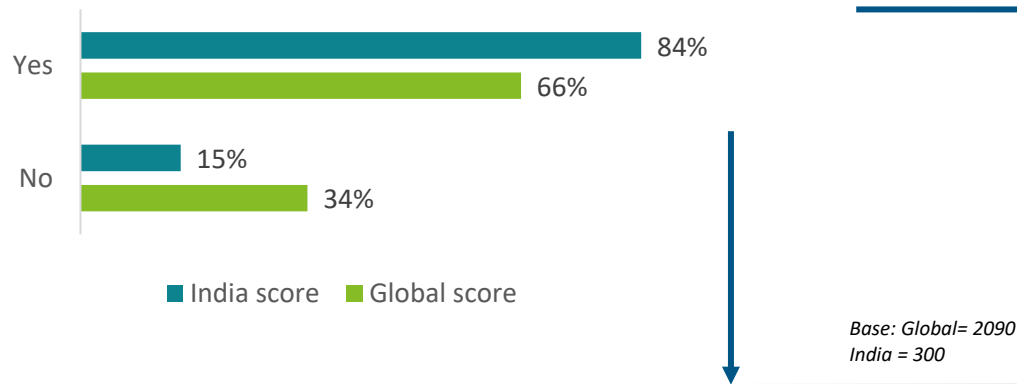
Base: Global= 2277,
India= 310

Reporting of non-inclusive behaviors

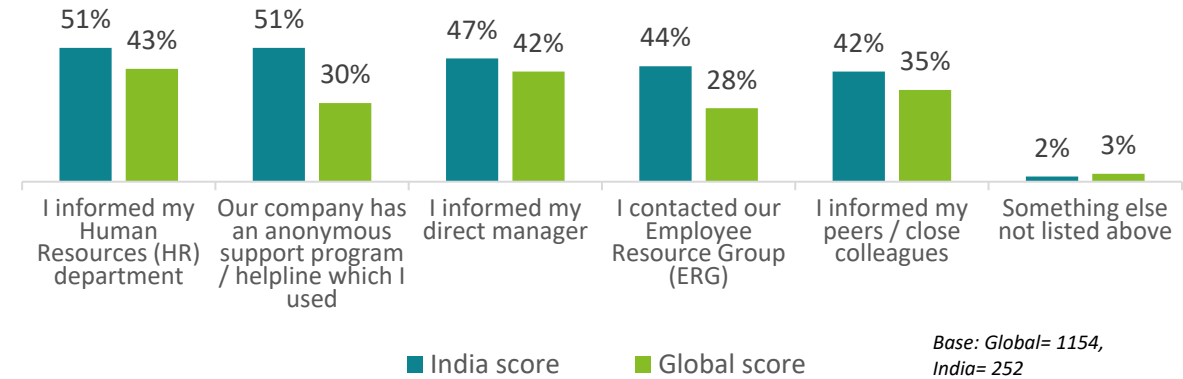
- More than eight in 10 Indian respondents who have experienced non-inclusive behaviors reported this to someone in their organization – most commonly, the HR department or the company’s anonymous support program/helpline.
- In India, asking the person reported to leave the company is the most common course of action, taken in half of reported cases. Providing support and/or counselling to the person who experienced non-inclusive behaviors is also a common action taken by just under half of employers.



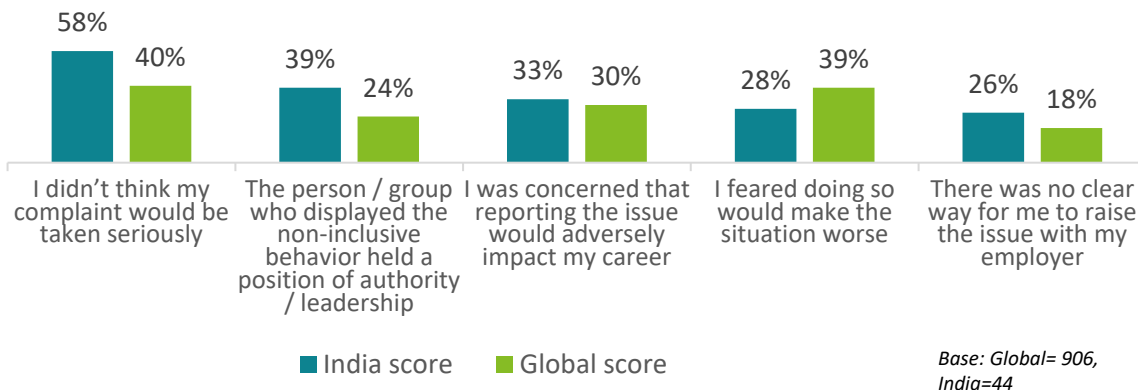
Levels of reporting among those who experienced non-inclusive behavior because of being LGBT+



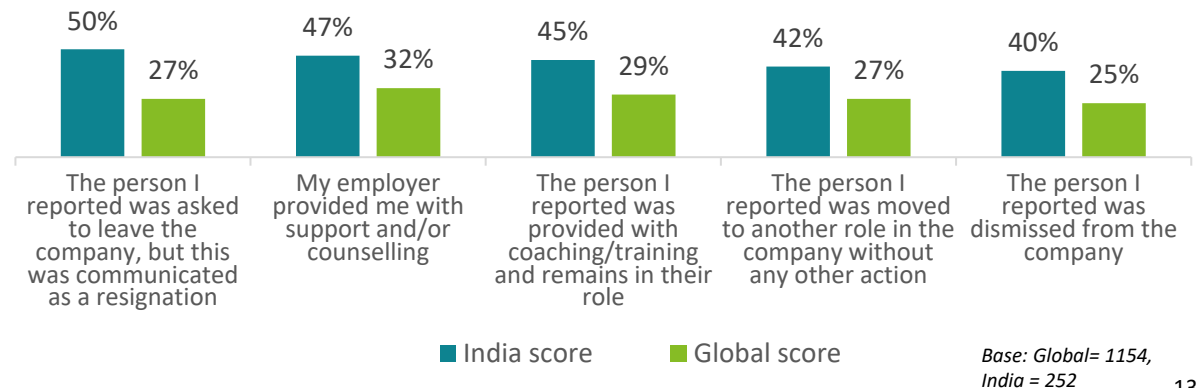
Who did people report non-inclusive behavior to?



Top 5 reasons for not reporting non-inclusive behaviors



Top 5 actions taken by employer after non-inclusive behavior was reported





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