

**Deloitte.**

**Women @ Work**  
A global outlook

India findings



## Global summary

- Responsibilities at work and at home have exponentially increased since the onset of the COVID-19 pandemic and **the burden is disproportionately impacting women**. Many are at a breaking point, leaving the workforce in record numbers. Yet businesses that give women the support they need to succeed have a more productive, motivated workforce – and are likely to report greater retention. Our research uncovers **the characteristics of organizations who are making tangible progress on gender equality** and steps employers can take to do the same.
- The following deck examines how women in India stand out from their global counterparts on key themes. We surveyed **500 women** in India and evaluated responses through the intersectional lenses of race and ethnicity, sexual orientation, and gender identity.

### KEY GLOBAL FINDINGS

#### The pandemic has negatively impacted women at work.



Today, less than half of women **rate their job satisfaction, motivation and productivity as “good,”** compared with around 3 in 4 before the pandemic.



Almost a quarter (23%) say they are **considering leaving, or are likely to leave, the workforce altogether** as a result of the impact of COVID-19.

#### Workplace culture has not been supportive during this time.

Just **39%** of women believe their organization’s commitment to supporting women during the pandemic has been sufficient. Less than a quarter of women (**22%**) say their employers have enabled them to create clear boundaries between work and personal hours while **63%** of women feel that their employers evaluate them based on the amount of time spent online rather than quality of output. Over half (**52%**) have experienced non-inclusive behaviors over the past 12 months and approximately **one-quarter** of women did not report these incidents because they were concerned about negative impacts to their careers.

#### Most employers can be doing more to help.

We identified a group of women who agree with the following three statements, indicating an inclusive, high-trust culture where women are valued and supported. We call this subset of organizations **“gender equality leaders”** (4% of the global sample) and organizations which did not meet any of these three criteria **“lagging organizations”** (31% of the global sample”).



I feel **confident to report non-inclusive behaviors**, without concern for reprisal



I feel supported by my employer to **balance work with other commitments**

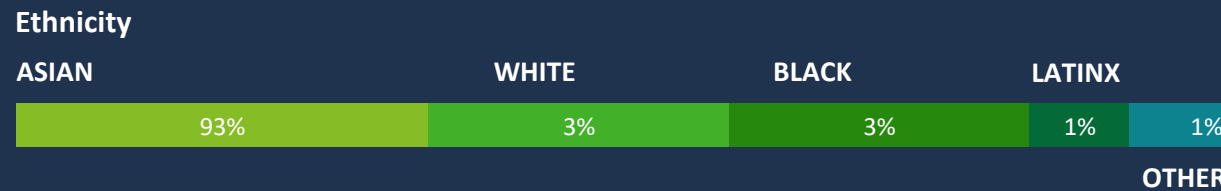


My **career is progressing** as quickly as I would like currently

# Country profile

500 total respondents in India

## RESPONDENT PROFILE

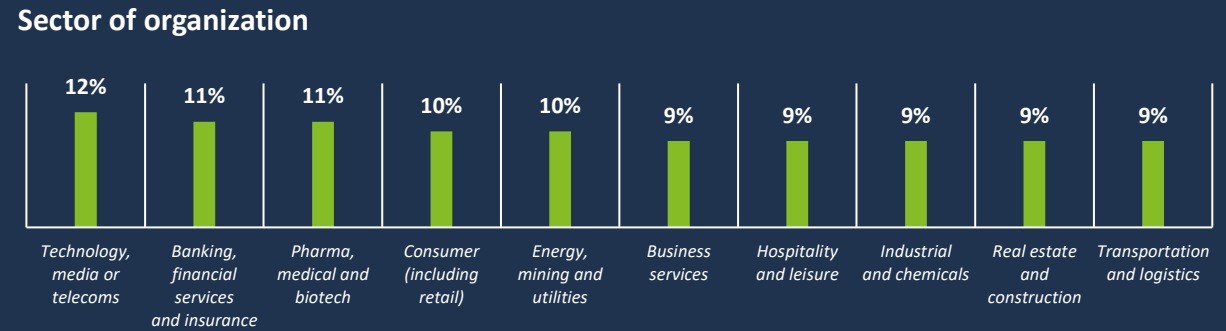


\*Note: Some questions about sexual orientation were not asked in India.

## BUSINESS PROFILE



\*Note this includes gig workers

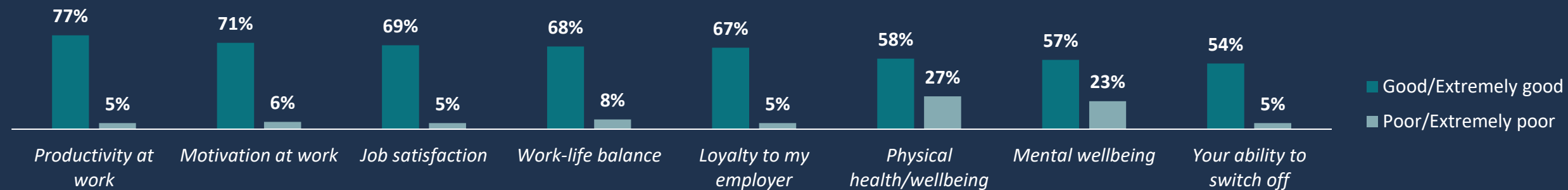




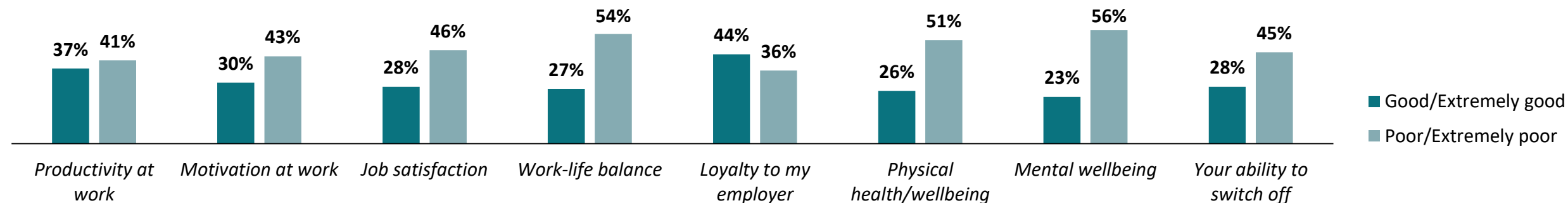
## Women’s job satisfaction and mental wellbeing have been severely impacted by the pandemic

- Nearly 7 in 10 (69%) women in India rated their job satisfaction as good or extremely good pre COVID-19. Today, only 28% of women say the same, representing a sharp decrease from before the pandemic.
- Women’s motivation at work has also been similarly impacted: 71% rated it as good or extremely good pre COVID-19, while today only 30% say this.
- Women’s mental wellbeing has also suffered. Before the pandemic, 57% rated their mental wellbeing as good or extremely good, while today only 23% say the same.

How would you rate each of the following aspects of **your life pre COVID-19?** (India responses only)



And how would you rate each of the following aspects of **your life today?** (India responses only)

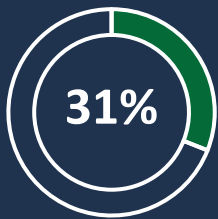




## Women in India do not feel their career is progressing as fast as they'd like

- Nearly 6 in 10 (57%) women in India say their career is not progressing as fast as they would like. This is much higher than the global average of 42%.
- Mental and physical health problems are the top reasons why women are concerned about their career progression: 42% and 40% of those whose career isn't progressing fast enough cite these two reasons, much higher than 29% and 22% of the global sample.
- Only 3 in 10 (31%) Indian women say their employer's support for women during the pandemic has been sufficient, compared to nearly 4 in 10 (39%) globally.

% of respondents indicating the below statements are true

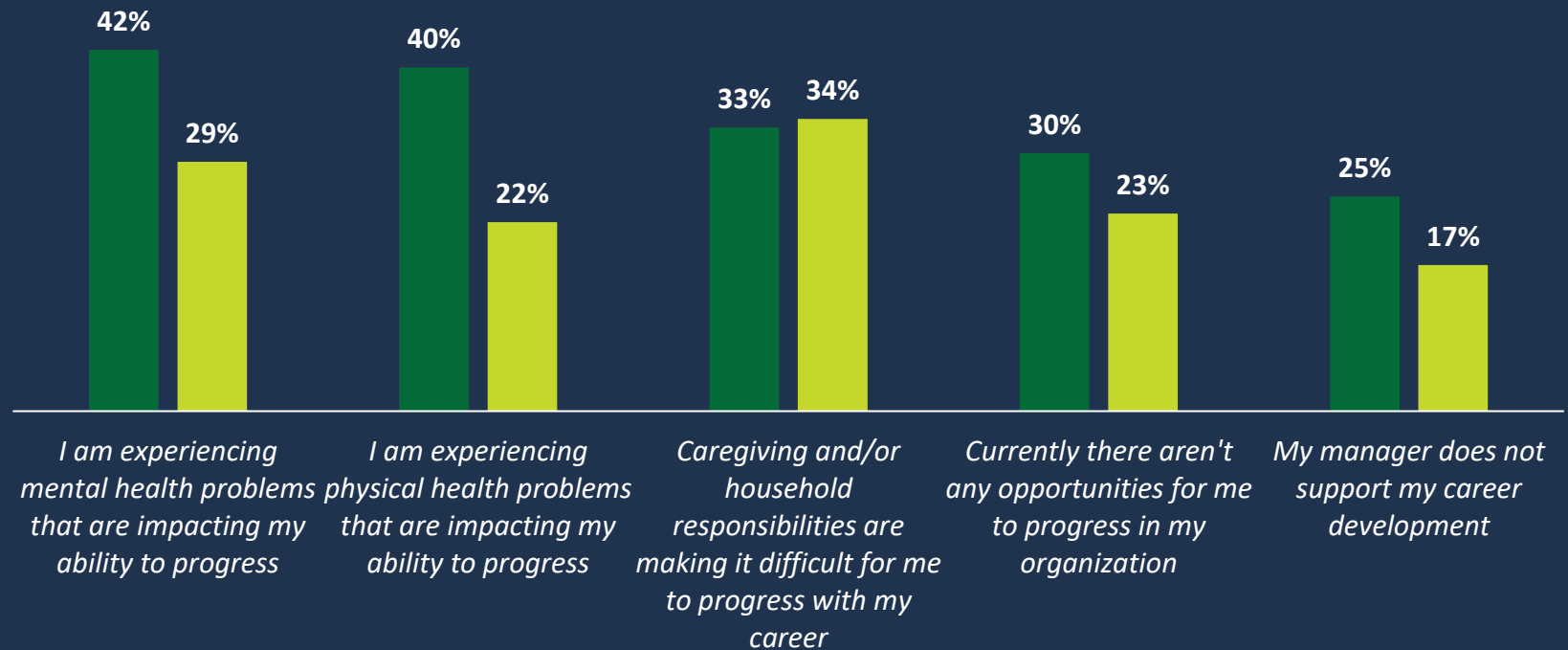


*My organization's commitment to supporting women has been sufficient since the COVID-19 crisis broke*  
**vs. 39% globally**



*My career isn't progressing as fast as I would like currently*  
**vs. 42% globally**

Why isn't your **career isn't progressing as fast as they would like at the moment** or you feel less optimistic about your career prospects than you did before the COVID-19 crisis broke? (top 5)



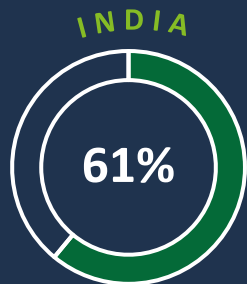
■ India ■ Global

\*Note "select multiple."

\*Note only asked of women who said "My career isn't progressing as fast as I would like currently" n=355 India/ n=2076 Global

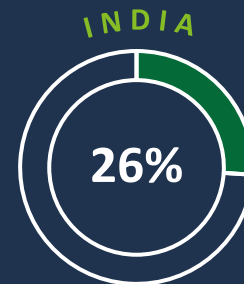
# Women in India are less hopeful about their career paths than before the COVID-19 pandemic

- More than 6 in 10 (61%) Indian women say they feel less optimistic about their career prospects today than before the pandemic, compared to 51% of the global sample.
- More than a quarter (26%) of Indian women are considering leaving the workforce altogether, compared to 23% globally.
- These women cite an increase in workload and caregiving responsibilities as the main drivers behind considering leaving the workforce. These reasons and relative percentages mirror the global averages.



of women surveyed in India feel *less optimistic about their career prospects* than before the pandemic

VS.

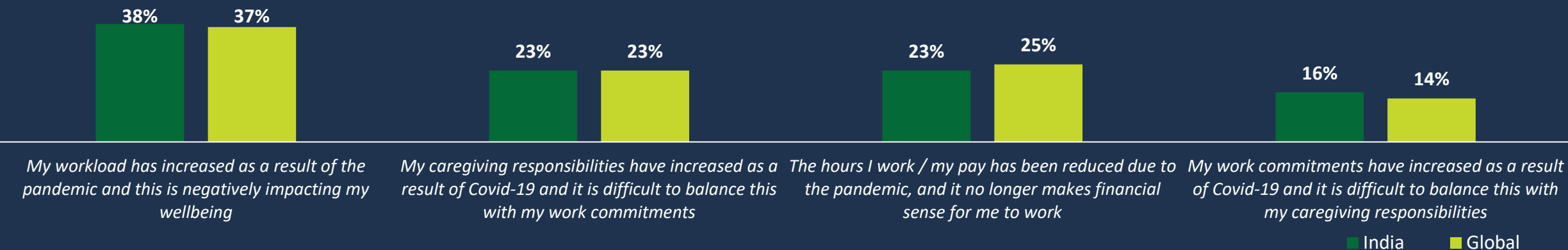


of women surveyed in India have *considered leaving the workforce altogether* during pandemic

VS.



## Main reasons why respondents are considering leaving the workforce:



\*Note only asked of women who said "I am considering leaving the workforce" n=128 India/ n=1152 Global

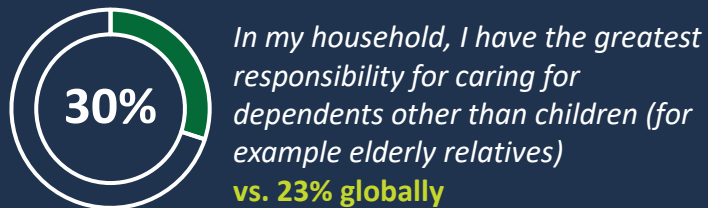




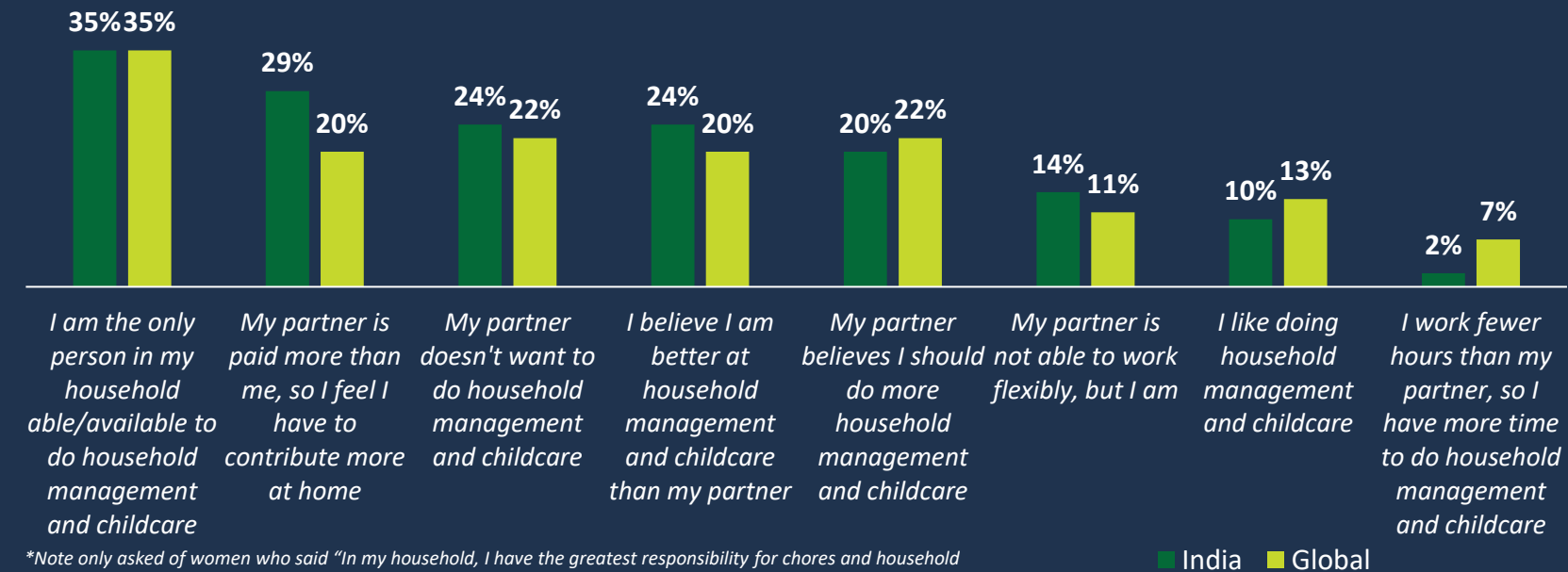
## Indian women are also taking on the most responsibility at home

- Nearly 8 in 10 (78%) Indian women say they take on the bulk of the household management and chores, much higher than 66% globally.
- Women in India are also more likely to take on more responsibility for childcare (47% vs. 38% globally) and care of other dependents (30% vs. 23% globally).
- These responsibilities may continue to impact women’s lives after the pandemic. Over one-quarter of Indian women (26%) say they are less likely than their spouse to return to the office when it is safe to do so.

% of respondents who indicated the below statements are true:



Reasons why women have the **greatest responsibility for chores and/or household management and caregiving** in their household:



\*Note only asked of women who said "In my household, I have the greatest responsibility for chores and household management" n=388 India/ n=3299 Global



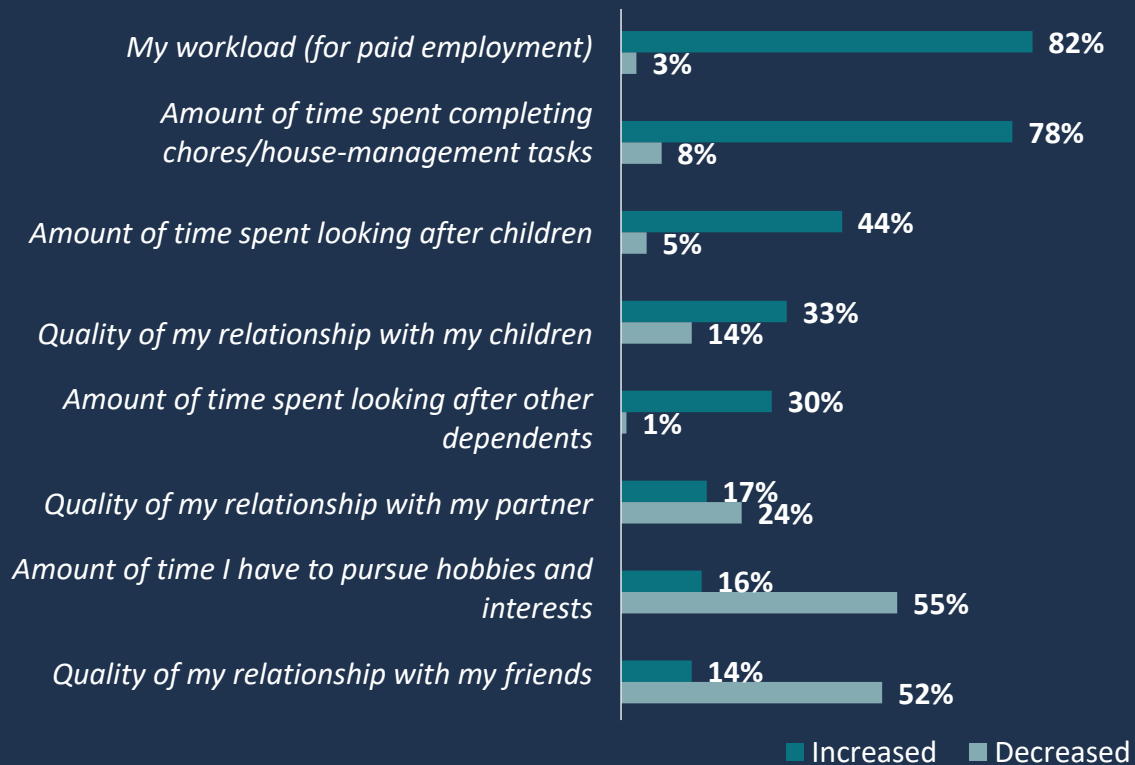
% of women who said they are less likely than their spouse to return to the office when it's safe to do so



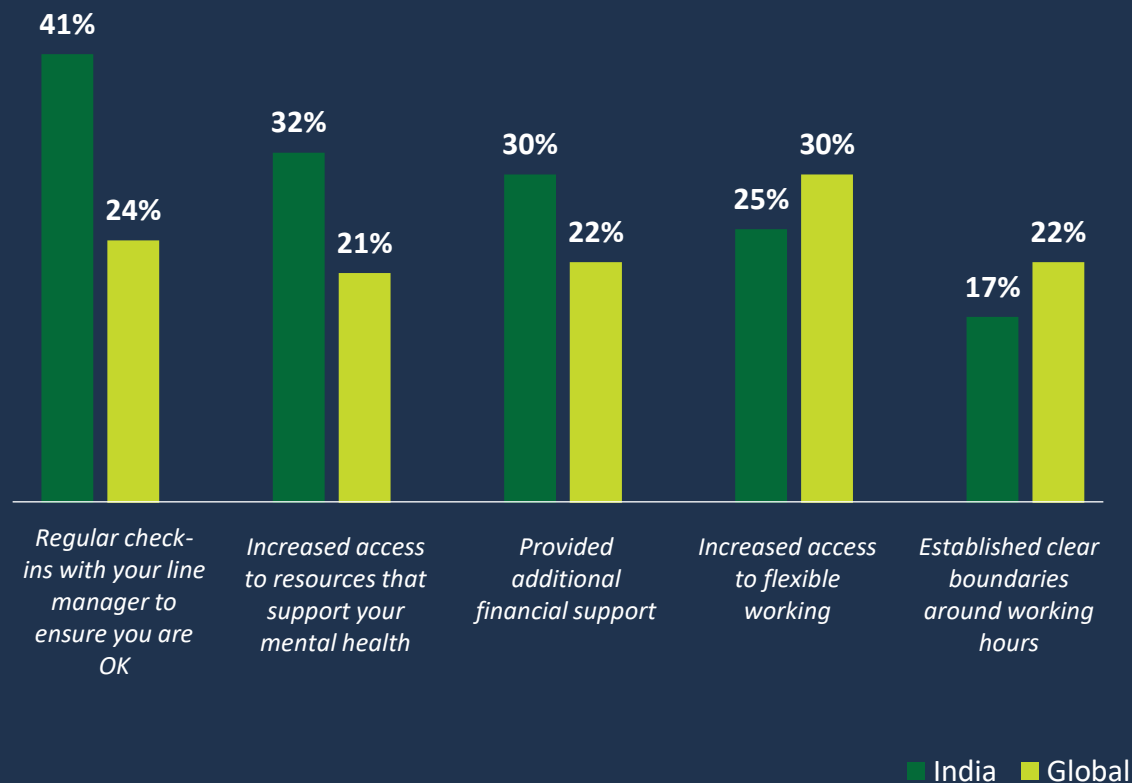
## A small number of Indian employers are providing enough resources to women during the pandemic

- 82% of women in India report their workload has increased since the COVID-19 crisis broke while 78% say that their household tasks have increased during this period.
- A subset of Indian employers are helping women mitigate the impacts of the pandemic. Positively, 41% of Indian women say they have regular check-ins with their line managers, compared to only 24% globally and 32% of Indian employers have also increased access to mental health resources, compared to 21% globally.
- Indian organizations are also more likely to have increased access to mental health resources (32% vs. 21% globally) and provided additional financial support (30% vs. 22% globally). But are less likely to have increased access to flexible working (25% vs. 30% globally) and to have clear boundaries around working hours (17% versus 22%).

To what extent, if any, have the following aspects of your life **changed since the COVID-19 crisis broke?** (India responses only)



Has your employer put in place any of the following to help mitigate the **impact of the pandemic on the mental wellbeing** of employees?\*( Top 5)



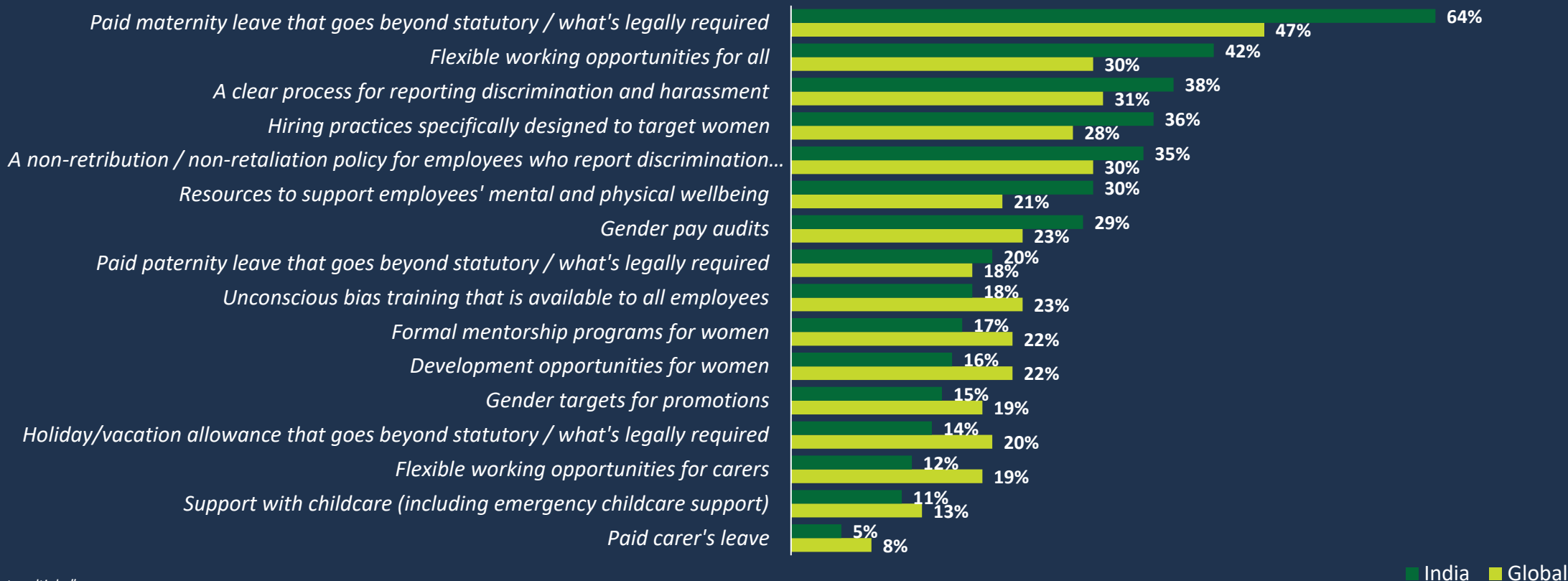




# Indian employers are providing more paid maternity leave, but could provide more development opportunities

- 64% of organizations in India have provided paid maternity leave that goes beyond what’s legally required, compared to 47% globally.
- However, Indian organizations are less likely to have implemented formal mentorship programs for women (17% vs 22% globally), development opportunities for women (16% vs 22% globally), and gender targets for promotions (15% vs 19%) globally.
- Only 38% have a clear process for reporting discrimination and harassment.

To the best of your knowledge, which, if any, of the following has your organization implemented?



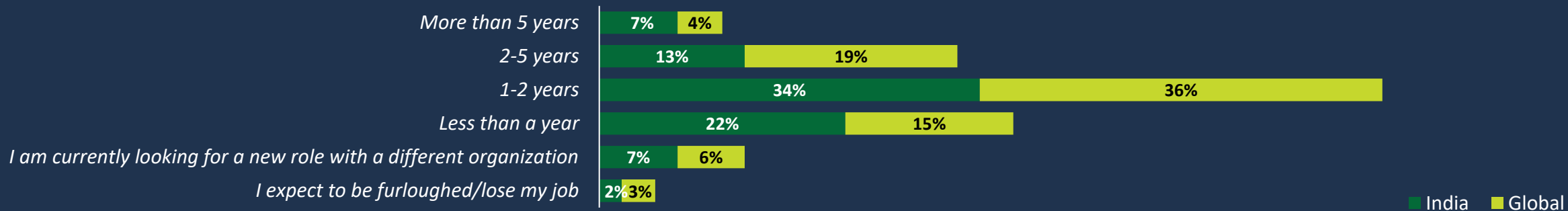
\*Note "select multiple."  
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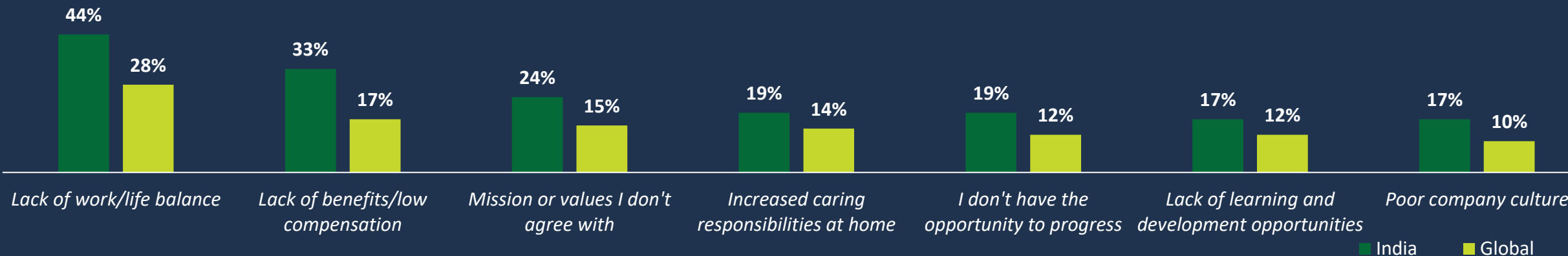
# Most Indian women may leave their employers within two years, citing a lack of work-life balance

- Almost two-thirds (65%) of Indian women say they will likely stay with their employer for less than two years. 13% will stay between 2 and 5 years, and only 7% with stay more than 5 years with their current employer.
- Lack of work-life balance is the most common reason why women in India would leave their employer – 44% of Indian women say this, compared to 28% globally. This is followed by lack of benefits/low compensation (33% vs. 17% globally) and mission or values they don't agree with (24% vs. 15% globally).

Given the current circumstances, **how much longer do you expect to stay with your employer?**



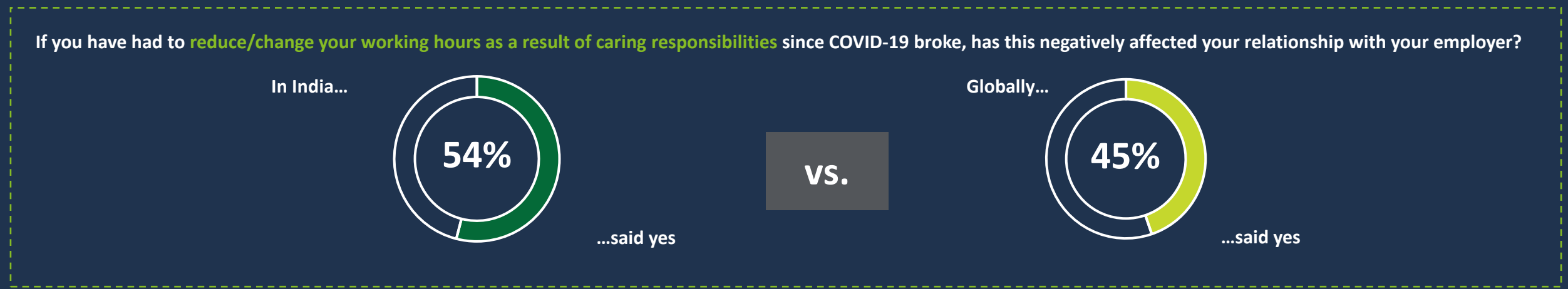
Which, if any, of the following reasons could **lead to you considering leaving** your current employment? (Top 7 of all selected)





# More than half of women who have reduced their hours say it has negatively affected their employer relationship

- 54% of Indian women who have had to change or reduce their working hours since COVID-19 broke say this has negatively affected their relationship with their employer, compared to 45% globally.
- Feeling overworked/burned out is most commonly result (64% vs. 52% globally), followed closely by reduced likelihood of being considered for a promotion (29% vs. 22% globally) and being given less interesting/challenging work (28% vs. 20% globally).



## How has your relationship with your employer been affected as a result of the change in your working hours?



\*Note only asked of women who said the relationship with their employer has been negatively impacted because they have changed or reduced their working hours n=269 India / n=2237 Global  
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## Women are not ‘switching off’ from work because they fear potential negative effects on their careers

- Almost two-thirds of Indian women (65%) are finding it difficult to switch off from work because they are worried about their careers. This is significantly higher than the global average (52%).
- This sentiment is followed closely by the fear that their organization will care less about them (43% vs. 33% globally) and that they will be excluded from important meetings or projects (41% vs. 33% globally).
- More than one-quarter (26%) of Indian women are also concerned they may be letting their team down by not being available at certain times.

Of those respondents who indicated they find it difficult to switch off from work, % that indicated concerns of the following happening if they did:



\*Note "select multiple." Only asked of women who said they find it difficult to switch off from work n=223 India/ n=1535 Global



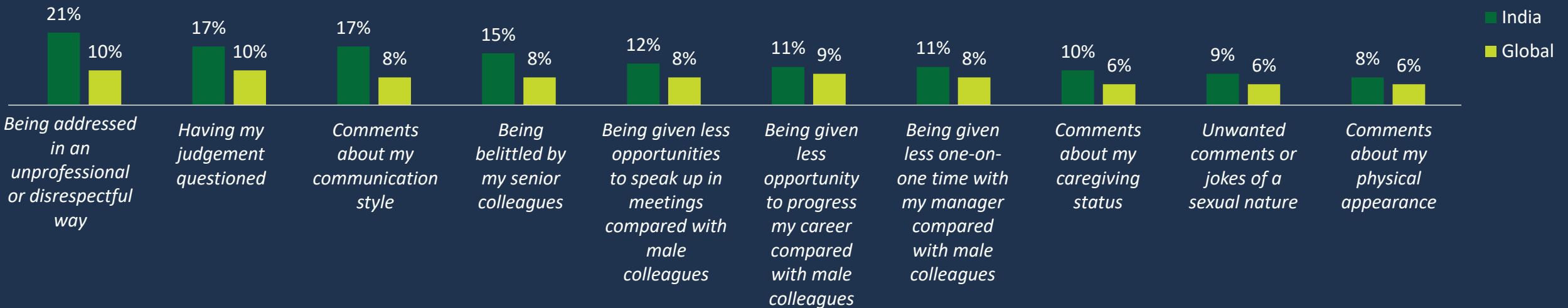
# Indian women continue to experience a wide range of non-inclusive behaviors

- Indian women were more likely than the global sample to say they had experienced non-inclusive behaviors in the last 12 months (69% vs. 58% globally).
- The non-inclusive behaviors most commonly experienced by Indian women are “being addressed in an unprofessional or disrespectful way” (21% vs. 10% globally), “having my judgement questioned” (17% vs. 10% globally), “comments about my communication style” (17% vs. 8% globally), and being belittled by senior colleagues (15% vs. 8%).

Women who said they had **experienced microaggressions in the last 12 months:**



Of those who had experience microaggressions, the % who indicated experiencing the following **non-inclusive workplace behaviors** over the past 12 months? (Top 10)



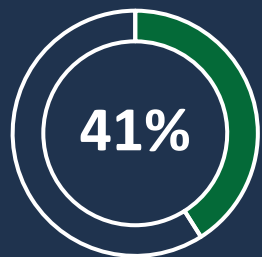
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# The majority of women do not report non-inclusive behaviors; but when they do report, they are generally pleased with their employer's response

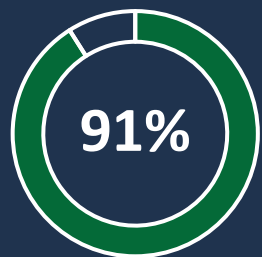
- Indian women were more likely to have formally reported non-inclusive behaviors compared with the global sample (41% chose not to report vs. 57% globally).
- Indian women were also more likely than the overall sample to say they were satisfied with the action their employer took in response to them reporting the issue (91% vs. 80% globally).
- The top reasons why Indian women chose not to report non-inclusive behaviors included: concerns over career reprisal (29% vs. 25% globally), feeling that the behavior wasn't serious enough to report (26% vs. 23% globally) and there being no clear route to escalate the behavior within their organization (24% vs. 15% globally).

Did you **formally report** any of these behaviors to your organization?



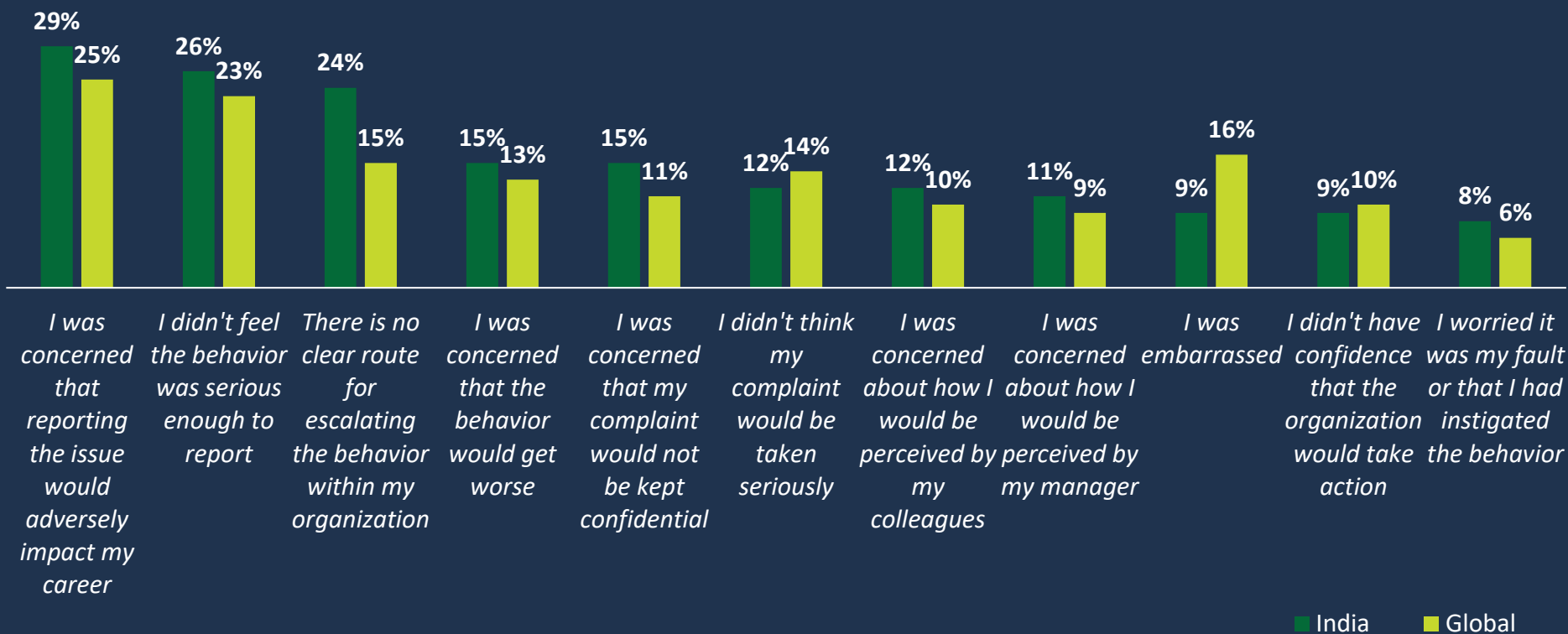
*in India chose not to report*  
vs. **57%** globally

Were you **satisfied with the action your employer took** in response to you reporting the issue(s)?



*in India said they were satisfied*  
vs. **80%** globally

Reasons for not reporting some of these behaviors:



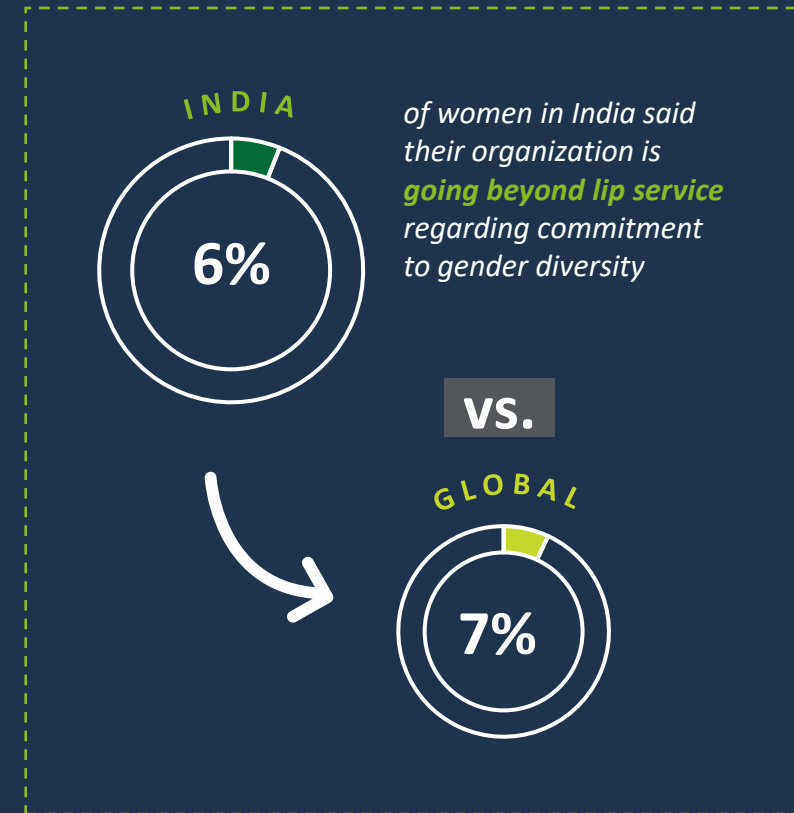
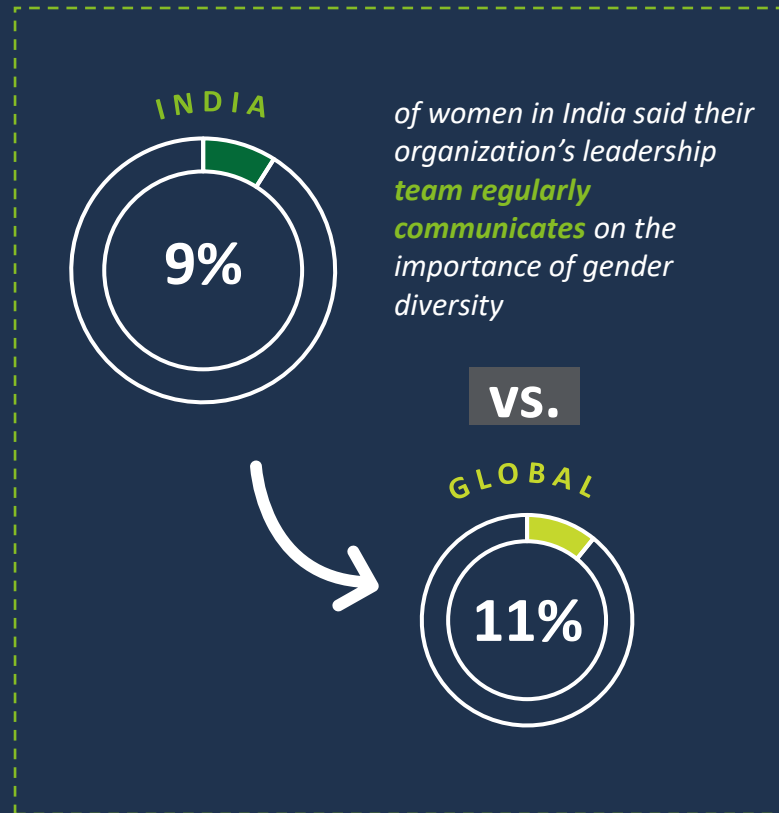
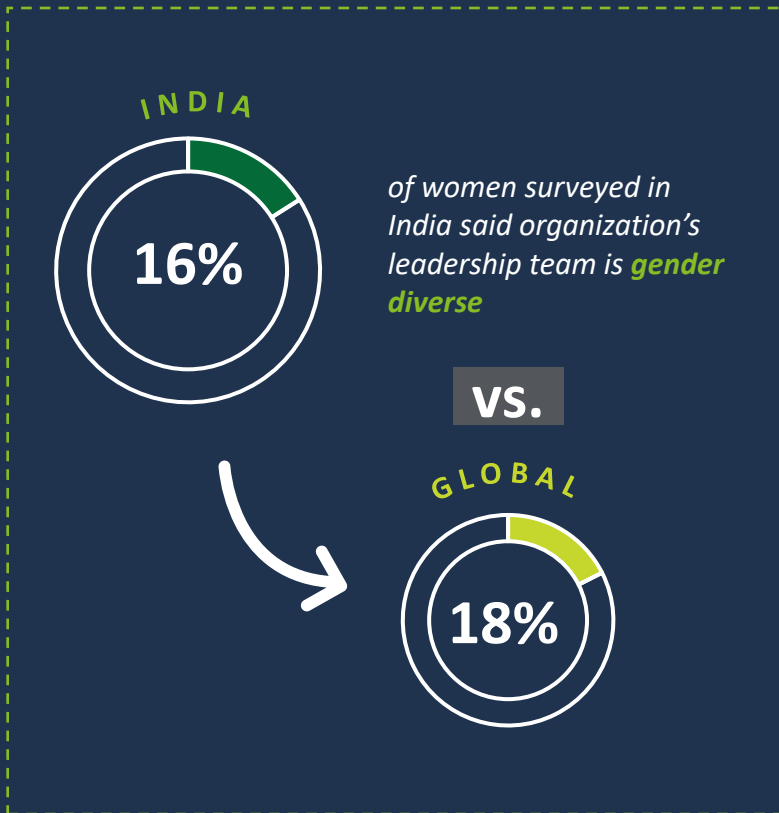




# Indian employers are not meeting women's expectations on gender diversity

- Indian women were slightly less likely than the overall sample to say their leadership team is gender diverse (16% vs. 18% globally) and that their leadership team regularly communicates on the importance of gender diversity (9% vs. 11% globally).
- Fewer than one in ten Indian women say their organization is going beyond lip service regarding its commitment to gender diversity (6% vs. 7% globally).

% of respondents who agree with the following statements





## A small group of “gender equality leaders” are cultivating inclusive, high-trust cultures for women

- 4% of the global sample, or around 200 respondents, reported working for organizations that consistently led the overall sample in their support of women. We were able to isolate the “leaders” from India and the global sample based on their female employees’ agreement with **all three** statements below.
- In contrast, 31% of the global sample work for “lagging organizations,” which have not committed to these three actions and the development of an inclusive, high-trust culture.

### Most employers can be doing more to help.

We identified a group of women who agree with the following three statements, indicating an inclusive, high-trust culture where women are valued and supported:



I feel **confident to report non-inclusive behaviors**, without concern for reprisal



I feel supported by my employer to **balance work with other commitments**



My **career is progressing** as quickly as I would like currently

Women who agree with all three statements **report higher levels of mental wellbeing, job satisfaction, motivation and productivity** compared with women who disagree with the above three statements. They also plan to stay with their employer for longer. We call this group of employers the gender equality leaders.

### Breakdown of gender equality leaders and lagging organizations in India:

Number of total respondents in India

500



Number of gender equality leaders

17



Number of lagging organizations

231

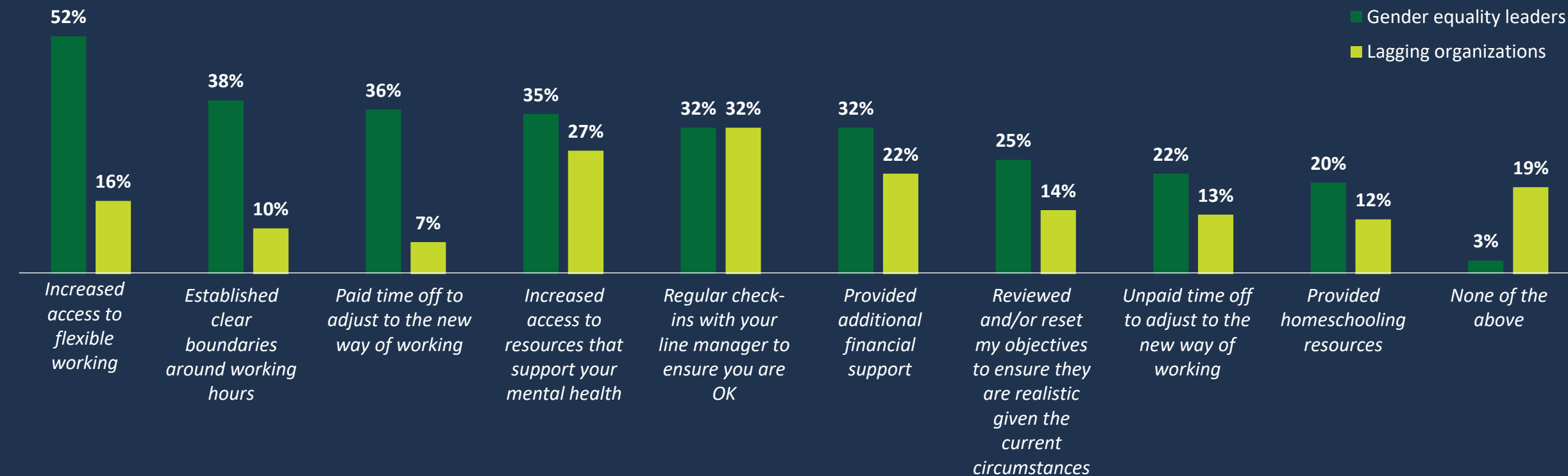




## Gender equality leaders are more likely to have taken steps to support flexible working and boundaries

- Gender equality leaders are more likely to have increased access to flexible working than lagging organizations, established clear boundaries around working hours, and provided paid time off during the pandemic.
- A quarter of gender equality leaders have reviewed or reset women’s objectives to ensure they are realistic in the current circumstances. Nearly one-fifth of lagging organizations have taken none of these actions to support women’s mental wellbeing.

% who say their employer has put in place the following to help mitigate the impact of the pandemic on the mental wellbeing of employees





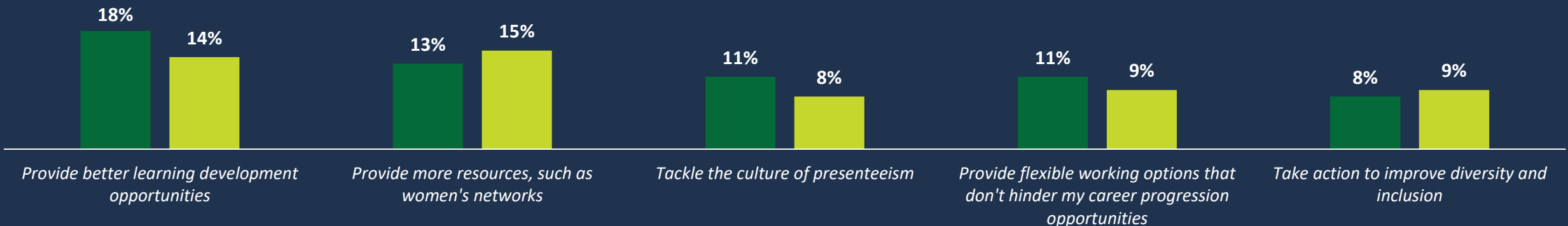
## Employers can improve gender equality at work by offering more development opportunities

- 37% of Indian women say that to improve gender equality in the workplace, their organization should offer development opportunities for women, followed by providing formal sponsorship programs for women (36%).
- Aside from increasing pay, 18% of Indian women feel that offering better learning opportunities would be the most beneficial action their employer could take to support women’s career development. 13% of Indian women also want more resources such as women’s mentorship networks.

What do you think your employer could do to **improve gender equality** in your workplace? (Top 5)



Aside from increasing your pay, what would be **the most beneficial thing(s)** your organization could do to support your career development and ensure you stay at this company in the long term? (Top 5)





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