Deloitte.



Women @ Work 2022: A Global Outlook

A letter from Michele Parmelee and Emma Codd

In 2021 Deloitte published the inaugural Women @ Work report, a survey of 5,000 women across 10 countries that aimed to better understand how women's experiences in the workplace impact their engagement and career progression. The survey also gave us a unique glimpse into the lives of women in the workplace amid the COVID-19 pandemic. The responses from around the globe made it clear that women's "everyday" workplace experiences were having a detrimental impact on their engagement—and that the pandemic was having a severe impact on women's lives and careers, including their work/life balance and wellbeing.

While our 2022 survey shows a modest improvement in women's work/life balance as well as slight increases in job satisfaction and motivation at work—possibly due to the easing of pandemic restrictions in many countries—it also shows a worrying longer-term impact, with many women feeling burned out.

The picture also remains stark when it comes to non-inclusive behaviors experienced in the workplace: More women this year reported experiencing harassment or microaggressions at work, a trend that is even more pronounced for LGBT+ women and women in ethnic-minority groups. The survey also illuminates worrisome findings about the "new normal" of work, as almost 60% of women working in hybrid models (arrangements that include any combination of remote and in-office work) report they have already felt excluded. For these reasons, and many others, most women indicated that they plan to leave their current employers within the next few years.

Our survey also offered insights into several of the major factors driving the Great Resignation—and suggests that this trend is set to continue—with lack of opportunities to advance and burnout rising to the top of the list of drivers for those who had left or were actively considering leaving their employers.

In addition to surveying women about their views on the workplace, we asked them what their employers could do to advance gender equality. The highest-ranking action was to provide a respectful and inclusive workplace culture, something that is critical for gender equality at work.

Our hope is that these findings help organizations improve women's experiences in the workplace and enable them to build a truly inclusive, supportive culture in which women of all backgrounds are given equal opportunities to progress their careers.



MICHELE PARMELEE Deputy CEO and Chief People & Purpose Officer Deloitte Global



EMMA CODD Global Inclusion Leader Deloitte Global

Executive summary

The past year has spurred a period of change for many companies and employees—one that has 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). However, the responses of **5,000 women in the workplace across 10 countries** make clear that the pandemic continues to take a heavy toll on women. Burnout, for example, has reached alarmingly high levels. At the same time, many women have made career and life decisions driven by their experiences during the pandemic. For some, this has meant seeking new, more flexible working patterns; for others, it has meant leaving their employers or the workforce entirely.

Our findings highlight substantial challenges—but they also show the positive impact of those organizations that are getting it right.

Key insights include:



Widespread burnout fueled by rising stress levels

Fifty-three percent 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. One-third have taken time off work because of mental health challenges, yet only 43% feel comfortable talking about these challenges in the workplace. Additionally, the "always on" culture remains— just over one-third of women rate their ability to switch off from work as poor/very poor, and 42% of that group worry that their career progression will be affected if they are not constantly available.



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 main reason. For those who had already left an employer since the start of the pandemic, "lack of opportunity to advance" was the most common reason. About one-quarter of respondents rate their job satisfaction and motivation at work as poor/very poor and almost half are less optimistic about their career opportunities compared to a year ago. More than half of the women surveyed 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 women

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 one-third of women (33%) say their employer offers this. And when asked about policies their organization has introduced during the pandemic, only 22% cited flexibility around where and when they work. Even more worrisome, 94% believe that requesting flexible working will affect their likelihood of promotion, and 90% believe their workloads won't be adjusted accordingly if they request flexible-working options. Additionally, women who have reduced or changed hours during the pandemic, as well as those who work part-time, have paid a high price: they are suffering significantly lower levels of mental wellbeing and motivation at work.

Executive summary



Hybrid working: An opportunity for change but challenges exist

While the hybrid way of working presents opportunities—including, if done right, enabling many to maintain the flexibility that remote working can afford—it also creates a risk of exclusion for those not physically present. Almost 60% of women who work in hybrid environments feel they have been excluded from important meetings, and almost half say they do not have enough exposure to leaders, a critical enabler of sponsorship and career progression. Additionally, only around one-quarter of women say their employer has set clear expectations of how and where they should work, which causes challenges for those seeking predictability (often as a result of caring responsibilities).



Inclusive, supportive organizations gain a competitive advantage



Harassment and microaggressions are on the rise—and often go unreported

The majority of women (59%) have experienced harassment (such as unwanted physical advances or repeated disparaging comments) and/or microaggressions (such as being interrupted or talked over, being patronized, and so on) over the past year at work, an increase over the 52% who reported experiencing harassment and/or microaggressions in 2021. Exactly half of women say they have experienced microaggressions, and 14% have experienced harassment. As in 2021, only a small proportion—just 31% —of these behaviors are reported overall, with microaggressions much less likely to be reported to an employer. Only 23% of microaggressions are reported compared to 66% of harassment behaviors. And women still fear reprisals for speaking up: 93% believe reporting non-inclusive behaviors will negatively impact their careers, and most feel that their employers won't take action even if they do report these behaviors.

Looking through an intersectional lens, women face more challenges

While non-inclusive behaviors impact the majority of respondents, women in ethnic minority groups and LGBT+ women are more likely to have experienced microaggressions. For example, LGBT+ women are more than 10% more likely to say they have been patronized or undermined by managers because of their gender. And women in ethnic-minority groups are significantly more likely to be excluded from informal interactions, feel patronized, and receive disparaging or belittling comments about their race or ethnicity compared to those in their country's ethnic majority.

As in our 2021 research, this year we identified a group of women (albeit just 5% of the sample compared with 4% in 2021) who work for "Gender Equality Leaders" —organizations that, according to the women surveyed, have fostered genuinely inclusive cultures that support them and promote mental wellbeing. Women who work for these companies report far higher levels of engagement, trust, and career satisfaction, and they also plan to stay with their employers longer. They also report more positive experiences with hybrid working, with only 14% saying they have felt excluded from meetings/interactions and only 7% saying they don't have enough exposure to leaders. Remarkably, only 3% of women working for Gender Equality Leaders reported being burned out, compared to 46% of respondents in the overall sample. Women employed by Gender Equality Leaders also receive greater mental health support: 87% say they get adequate mental health support from their employer, and the same percentage feel comfortable talking about their mental health in the workplace.

Women facing widespread burnout

Section 1.

More than half of women are more stressed than a year ago,

and 46% feel burned out



Only 39% of the women surveyed in 2022 rate their mental health as good/very good (a slight increase over 2021), while **almost half reported it to be poor/very poor.** More than half (53%) said they are more stressed than they were a year ago, and almost half (46%) report feeling burned out.

Despite this, only 43% feel comfortable talking about mental health challenges in the workplace, only 44% say that they get adequate support from their employer when it comes to mental health, and 33% have taken time off work for mental-health reasons.

Which of the following statements are true for you?





Burnout rates are higher among

certain groups of women



Our analysis shows that high burnout levels are largely experienced by women in middlemanagement roles and younger women (aged 18 to 25), with 61% of respondents in both these demographics reporting that they feel burned out.

Women in ethnic-minority groups are also more likely to feel burned out than those who are not in a minority group. They are also less likely to feel comfortable talking about their mental health in the workplace or disclosing it as a reason for their absence.



[Base size: ethnic minority in country of residence = 543, ethnic majority in country of residence = 4,457]



Women are still unable to "switch off" from work, with many concerned about the impact on career progression



Widespread burnout is made worse by poor work/life balance and an inability to "switch off" from work. Only 45% of women rated their ability to switch off from work as good/extremely good, and **34% rated it as poor/extremely poor**. Of those women who can't switch off, **42% worried that their career progression will be affected if they are not constantly available**— with 7% saying that they will need to consider taking a career break or leaving the workforce completely if their employer does not address this.

How would you rate your ability to switch off from work?



How would you rate your work/life balance?





Section 2.

Burnout and limited advancement opportunities are driving women away from their employers

Women are more likely to be actively looking for a new role than they were a year ago, and more than half plan to leave their current employer within two years



The number of women looking for a new role at the time of polling increased since last year, with one in 10 saying they were actively looking.

When it comes to future plans, the outlook is bleak for employers. More than half of women plan to leave their employer within two years. This is most pronounced for those in middle-management and non-managerial roles, with fewer than one-quarter of women in those roles planning to stay with their employer for more than two years. Only 10% of women plan to stay with their current employer for more than five years.

% of women who plan to leave within two years



© 2022. For information, contact Deloitte Touche Tohmatsu Limited.



Burnout and lack of opportunities to advance are

the top two factors driving women away from their employers



Our research revealed different motivating factors for those who have recently left an employer versus those who are currently considering it. A lack of opportunities to advance was the most cited reason (22%) for those who had already left an employer since the start of the pandemic (with lack of work/life balance and insufficient pay tying for second, both cited by 18%). Among those who had not yet left their employer but were actively considering it, burnout (cited by nearly 40%) was the most-cited reason.



What was your main reason for leaving your former employer?



18% Lack of work/life balance

Pay wasn't 18% high enough

[Base size: total = 227]

[Base size: total = 482]



What is your main reason for wanting to leave your current employer?

38% I teel burned out I feel

Pay isn't high enough

Not enough .3% opportunities to advance



© 2022. For information, contact Deloitte Touche Tohmatsu Limited.

Career optimism on the decline

Almost half of women are less optimistic about their career opportunities than they were a year ago, with optimism significantly lower among women who work part-time. And about half of women in middle-management and non-managerial roles say their careers are not progressing as quickly as they would like, while women in ethnic minority groups are more likely to say they feel less optimistic about their career prospects than they did last year.

About one-quarter of women rate their job satisfaction and motivation at work as poor/very poor, and only 13%, respectively, rate these aspects as extremely good.



Section 3. Women who work flexible hours report poorer mental health

Despite a widespread shift in working arrangements,

flexibility is not a reality for many women

Although women are slightly more likely than in 2021 to say that their employer offers flexible-working policies, the proportion is still low: **just one-third of women (33%) say that their employer offers this**. And when asked about policies their organization has introduced during the pandemic, **only 22% cited flexibility around where and when they work**.

Even more worrisome, 94% of respondents believe that requesting flexible working will affect their likelihood of promotion, and 90% believe their workloads won't be adjusted accordingly if they request flexible-working arrangements.

Do you agree with the following statements?



If I request flexible-working options, I do not believe my workload would be adjusted accordingly



Requesting or taking advantage of flexible-working opportunities would affect the likelihood of promotion in my organization



Which of the following has your organization introduced when it comes to ways of working in a physical office during the pandemic?



Clear, up-to-date information
about physical health and safety
expectations in the office



22% Flexibility around where and when I work





Women who have reduced or changed hours pay a high price

Women who have reduced or changed their hours during the pandemic are suffering significantly lower levels of mental wellbeing and motivation at work.

They are also more than twice as likely to say their stress levels are higher than they were a year ago, compared to those who had not changed their hours (70% vs. 31%)—and **almost three times as likely to feel burned out (65% vs. 22%).**



Have the following aspects of your life increased in the past year?



Women who have changed their working hours during the pandemic Women who have not changed their working hours during the pandemic



Which of these statements are true for you?





Part-time workers face higher levels of stress and burnout

Women who work part-time are almost 10% more likely to say they feel burned out than those who work full-time, and far less likely to say they get adequate mental-health support from their employers—or feel comfortable disclosing mental health as a reason for their absence.

Both women who have changed their working hours during the pandemic and those who work part-time are also considerably less optimistic about their career prospects. Sixty-one percent of women who have changed their hours feel less optimistic about their career prospects than last year.

This all points to a **lack of support for those women who choose to work flexibly or part-time**, with organizations potentially offering these working options but not actually adjusting workloads.



Which of these statements are true for you?

■ Women in part-time employment





© 2022. For information, contact Deloitte Touche Tohmatsu Limited.

[Base sizes: women in full-time employment = 4,723; women in part-time employment = 277]

■ Women in full-time employment

Section 4.

Hybrid working is not delivering the benefits it could

Employers are not doing enough to support the transition to a hybrid work model as women report a lack of flexibility and feeling excluded

While many employers have made the move to hybrid working over the past year—44% of our respondents said they work in a hybrid way—our survey shows that concerns about exclusion are not unfounded. More than half (54%) of women who work in hybrid environments have already experienced a lack of flexibility in their working patterns or are concerned this will happen in the future.

Almost 60% of women who work in hybrid environments feel they have been excluded from meetings and interactions, and almost half say they do not have enough exposure to leaders—a critical enabler of sponsorship and career progression.

This exclusion is taking its toll. Women who have reported experiencing exclusion in a hybrid environment report much worse mental health and higher stress levels. They are also more likely to have taken time off to cope with mental-health challenges.

Hybrid working is also not delivering the predictability that many women—including those with caregiving responsibilities seek. Sixty-four percent of hybrid workers indicate their employer hasn't set clear expectations around where and how they're expected to work.

Have you experienced any of the following aspects of working in a hybrid or remote environment?



Which of these statements are true for you?





Lack of inclusivity in a hybrid workplace is a symptom

of a wider cultural issue

Our survey found that women who work in a hybrid environment are significantly more likely to experience microaggressions than those who work exclusively on site or are exclusively remote.

We also found that women who have experienced exclusion in a hybrid work environment are far more likely to have experienced non-inclusive behaviors more generally. This suggests that a non-inclusive culture within an organization can impact women not only when everyone is physically present, but can also persist in a hybrid environment.

While hybrid working could be a great opportunity to drive meaningful and sustained change when it comes to gender equality at work, the data shows that many women are instead feeling more isolated and excluded.





Section 5.

Harassment and microaggressions are on the rise

Non-inclusive behaviors have increased in the past year

Harassment and microaggressions against women have increased year over year. Our 2022 data reveals that 59% of women have experienced at least one non-inclusive behavior in the past year, compared with 52% in the 2021 research.

In the past year, half of women (50%) have experienced microaggressions at work, and 14% have experienced harassment.



Have you experienced non-inclusive behaviors at work over the past 12 months?

2022





© 2022. For information, contact Deloitte Touche Tohmatsu Limited.

Women in ethnic-minority groups and LGBT+ women are more likely

to have experienced microaggressions

Our survey shows LGBT+ women are 7% more likely to cite being addressed in an unprofessional or disrespectful way than women who are not LGBT+, and more than 10% likelier to have felt patronized or undermined by management because of their gender.

Women in ethnic-minority groups are significantly more likely to cite experiencing someone else taking credit for their idea than those in the ethnic majority in their country, and to have felt patronized or undermined by management because of their gender.



Which of the following behaviors have you experienced at work over the past 12 months?

- Disparaging/belittling comments about my sexual orientation: **18%** vs **1%**
- Having someone else take credit for my idea: 16% vs 8%
- Being excluded from informal interactions or conversations: 15% vs 11%
- Feeling patronized/undermined/underestimated by my manager/senior leaders because of my gender: 13% vs 2%
- Consistently being addressed in an unprofessional or disrespectful way: 11% vs 4%



Women not identifying as LGBT+

- Being excluded from informal interactions or conversations: 15% vs 10%
- Having someone else take credit for my idea: 15% vs 8%
- Being given fewer opportunities to speak up in meetings compared with male colleagues: 12% vs 7%
- Disparaging/belittling comments about my race or ethnicity: 9% vs 2%
- Feeling patronized/undermined/underestimated by my manager/senior leaders because of my gender: 9% vs 2%
- Ethnic minority in country of residence
- Ethnic majority in country of residence



Non-inclusive behaviors are underreported

Why did you decide not to report the behavior?

Despite the number of women experiencing non-inclusive behaviors, only 31% of these behaviors were reported, with harassment far more likely to be reported than microaggressions (66% vs. 23%).

The most common reason women gave for not reporting non-inclusive behavior was that **they did not feel the behaviors were** serious enough to report. This was more likely to be said by women who experienced microaggressions, which is a worrying indication of their wider beliefs about their company cultures.

Women who reported experiencing harassment but not microaggressions were most likely to say **they didn't report the harassment because they were embarrassed—42% felt this way.** One-fifth of women experiencing harassment didn't report it because they were worried the behavior would get worse. And women still fear reprisals for speaking up: 93% believe reporting non-inclusive behaviors will negatively impact their careers, and most feel action won't be taken if these behaviors are reported.

Our survey also found that only 22% of women work for a company that has implemented a clear process for reporting discrimination and harassment.

Finally, while LGBT+ women and women in ethnic-minority groups are significantly more likely to encounter microaggressions, the data shows that they are also significantly more likely to report them to their employers.



Women who have experienced harassment only

[Base sizes: Women who have experienced harassment and microaggressions = 212, women who have experienced harassment only = 138, women who have experienced microaggressions only = 1,863)

Women who have experienced microaggressions only

Women who have experienced harassment and microaggressions

© 2022. For information, contact Deloitte Touche Tohmatsu Limited.

Section 5.

Some employers are getting it right: Meet the Gender Equality Leaders

Women who work for Gender Equality Leaders report far

higher levels of wellbeing and job satisfaction

As in the 2021 research, we identified a group of organizations we call the Gender Equality Leaders. The women that work for these organizations agree with the following three statements:



I feel confident to report when I encounter non-inclusive behaviors and microaggressions, without concern about career impact or reprisal



I feel supported by my employer in my efforts to balance my work responsibilities with other commitments



My career is progressing as quickly as I would like

The 2022 research shows that the proportion of women working for Gender Equality Leaders has increased slightly year over year—up from 4% to 5%.

Additionally, as with 2021, our research also identified a group of "lagging" organizations. Women that work for these organizations disagree with all the above statements. This year, 24% of our respondents work for these Gender Equality Lagging Organizations, which is an improvement on last year's figure of 31%.

Once again, the data demonstrates that women who work for Gender Equality Leaders report far higher levels of wellbeing and job satisfaction.



© 2022. For information, contact Deloitte Touche Tohmatsu Limited.

Women who work for Gender Equality Leaders report far

higher levels of wellbeing and job satisfaction

Gender Equality Leaders have built cultures that promote mental wellbeing. Of the women who work for them, 87% say they get adequate mental health support from their employer, and the same percentage feel comfortable talking about their mental health in the workplace.

And the support is paying off: just 3% feel burned out, compared to 81% of women who work for lagging organizations.

This carries through to the hybrid environment, with the women who work for the Gender Equality Leaders reporting far more positive experiences with hybrid working. Only 14% have felt excluded from meetings and only 7% say they do not have enough exposure to leaders.



Percent who rate the following as good/extremely good



Gender Equality Lagging organizations



© 2022. For information, contact Deloitte Touche Tohmatsu Limited.

Gender Equality Leaders are reaping the benefits when it

comes to retention and motivation

Organizations that want to retain and attract women can learn from Gender Equality Leaders. **Respondents who work for these companies are far more likely to stay in their roles**: none of the women who work for them are currently looking for a new job, and only 9% plan to leave in the next 1-2 years. Conversely, 63% of those working at lagging organizations plan to leave within the next two years.

Women at Gender Equality Leaders also report significantly higher levels of motivation and productivity: **90% rate their motivation at work as good or extremely good**, compared to 31% of lagging organizations.



How would you rate your motivation at work?





Our recommendations

The responses from this year's survey have shown us not only what has changed for women at work over the past year, but also the challenges and opportunities that exist for employers when it comes to progressing gender equality. From hybrid working to views on future career prospects and the behaviors encountered in the workplace, there is a clear gap between expectations and reality.

After a two-year setback for gender equality in the workplace, it is critical that employers act now.

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.

This is where they can start:



1. Address the burnout epidemic

Almost half of women feel burned out, and burnout is the top reason why women want to leave their jobs. At a time when employers need to focus on retaining women, failure to address burnout is not an option. While there can be multiple contributing factors, burnout is more likely to occur where there is a misalignment or mismatch between an individual's expectations and the reality that they experience—including in areas such as workload and recognition. For leaders and managers, identifying and addressing such misalignments or mismatches is critical—as is providing education, techniques, and practical tools to prevent and mitigate burnout. Since burnout is such a significant issue for women at work, failure to address it will undermine organizations' gender-equality ambitions.





2. Make mental wellbeing a priority

With over half of women saying that their stress levels are higher than a year ago, and almost half describing their mental health as poor/very poor, it is critical that employers address mental health issues. This doesn't just mean providing support when it is needed—it means focusing on eliminating the stigma that is preventing many women from discussing their mental health with their employers, enabling empathetic leadership, and ensuring that women are able to work in ways that enable them to thrive. Organizations can take a range of steps to support better mental health for all, including educating leaders and managers about mental health and how to spot the signs that someone may be encountering mental health challenges, and directing them to appropriate support routes. Managers should also be encouraged to share lived-experience stories to help remove any stigma around mental health that may exist in the workplace.



3. Make flexible working work for women

With just one-third of women saying their employer offers flexible-working policies, and 94% believing that requesting flexible working will affect their likelihood of promotion, it is clear that flexible working remains a challenge for many organizations. This is not just about policies—it is about organizations making a clear commitment to those who wish to work flexibly. They can do this by enabling flexible-working solutions that work for the individual and the business, and are fully supported by leaders and managers; ensuring that when flexible working arrangement are made, workload is suitably adjusted; and enabling those working flexibly to do so without fear of career penalty.



Our recommendations



4. Approach hybrid working with inclusion and flexibility in mind

While hybrid working presents an opportunity for employers—and employees—women are already experiencing exclusion and lack of predictability in the hybrid environment. They are also experiencing reduced exposure to leaders—the very people who make decisions about their careers and could provide them with sponsorship opportunities. Employers must work to ensure that hybrid working works for all, not just those who are physically present. This means ensuring that employees clearly understand what is expected of them—for example, through team agreements on ways of working—and training leaders to lead meetings and interactions in a way that includes all present, whether in person or remote. It also means ensuring that those who are not physically present have much-needed access to leaders and sponsors.



5. Instill a truly inclusive culture

Women say that the most important step their employer can take to improve gender equality in the workplace is to build a truly respectful and inclusive working culture. Yet our survey has shown that non-inclusive behaviors experienced by women in the workplace have increased since last year, with many women also experiencing exclusion when working in a hybrid environment. And many of those women who experience non-inclusive behaviors do not report them—most notably when it comes to microaggressions. Employers must act now to ensure that their organizations' everyday culture is always respectful and inclusive—where non-inclusive behaviors, including microaggressions, are not tolerated, and, when they are experienced, women feel able to report them without concern of negative repercussions. This means clear and unequivocal messaging from leaders, accessible routes and clear processes for reporting, and a commitment that all non-inclusive behaviors should be reported without concern of career penalty.



Methodology

We surveyed 5,000 women across 10 countries and sectors between November 2021 and February 2022.

Countries surveyed: Australia, Brazil, Canada, China, Germany, India, Japan, South Africa, The United Kingdom, and The United States.



Deloitte.

Deloitte refers to one or more of Deloitte Touche Tohmatsu Limited ("DTTL"), its global network of member firms, and their related entities (collectively, the "Deloitte organization"). DTTL (also referred to as "Deloitte Global") and each of its member firms and related entities are legally separate and independent entities, which cannot obligate or bind each other in respect of third parties. DTTL and each DTTL member firm and related entity is liable only for its own acts and omissions, and not those of each other. DTTL does not provide services to clients. Please see www.deloitte.com/about to learn more.

This communication contains general information only, and none of Deloitte Touche Tohmatsu Limited ("DTTL"), its global network of member firms or their related entities (collectively, the "Deloitte organization") is, by means of this communication, rendering professional advice or services. Before making any decision or taking any action that may affect your finances or your business, you should consult a qualified professional adviser.

No representations, warranties or undertakings (express or implied) are given as to the accuracy or completeness of the information in this communication, and none of DTTL, its member firms, related entities, personnel or agents shall be liable or responsible for any loss or damage whatsoever arising directly or indirectly in connection with any person relying on this communication. DTTL and each of its member firms, and their related entities, are legally separate and independent entities.

© 2022. For information, contact Deloitte Global.