

India's Return-to-Office Index



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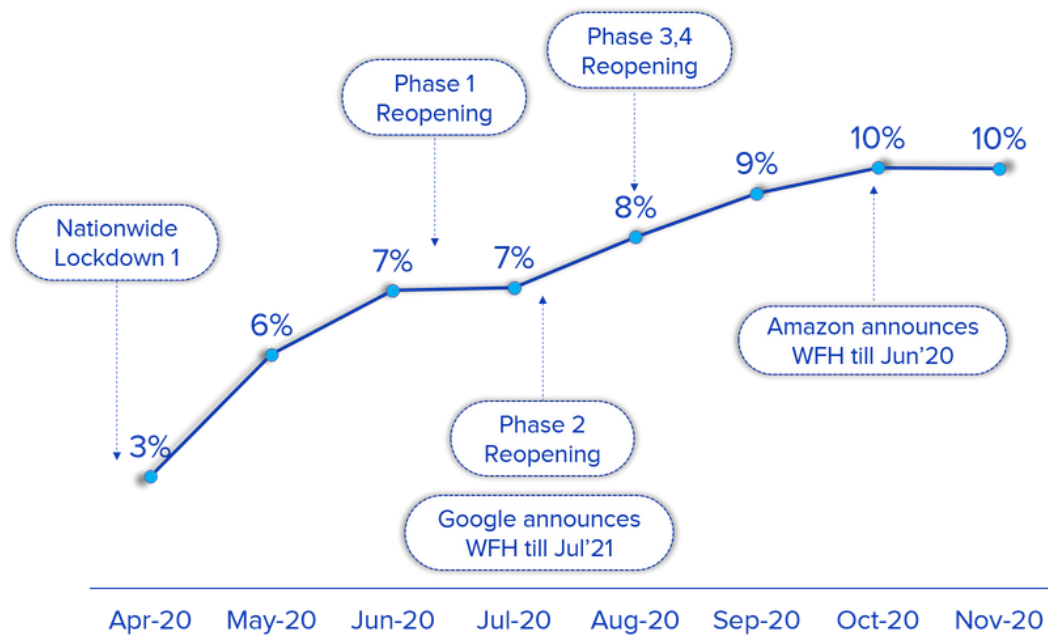
December 2020

Key findings of India's Return-to-Office (RTO) Index*

- The number of people returning to office in November'20 has risen to **10% of pre-COVID levels** (March'20).
- **375% more people returned to office** in November'20 as compared to April'20
- **Mumbai and NCR** lead the Return-to-Office trends currently at **greater than 20% of pre-COVID levels**; **Bangalore and Hyderabad** are currently at less than **5% of pre-COVID levels**
- Return-to-office growth rate of **women employees is higher** than that of male employees.
- **Companies in Pharma sector (27%) and IT, ITeS & BPO sector (16%)** are returning to office at a faster rate, compared to pure-play **Software Product companies (3%)**
- With the arrival of vaccines in 2021, return-to-office levels in **IT, ITeS & BPO sector could potentially reach 50% of pre-COVID levels by July'21 and up to 80% by September'21**
- **73% of Indian CEOs** are considering flexible working models as immediate priority

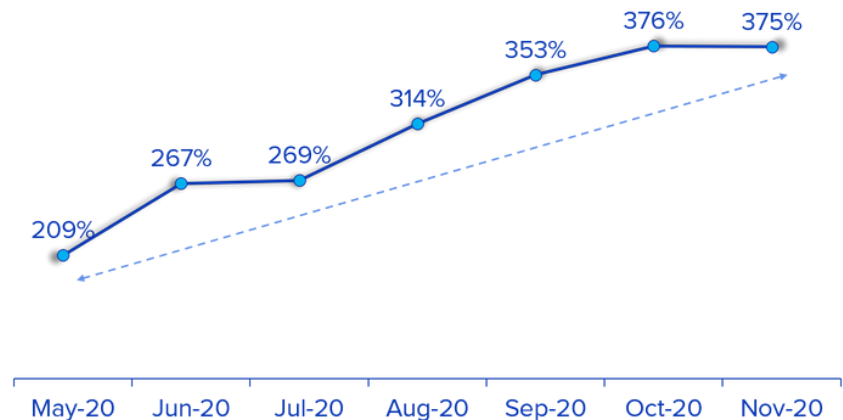
*RTO Index is based on MoveInSync's employee office commute usage data; Sample size: 400,000+ employees across India

% Return-to-office vs. pre-Covid level (March'20)



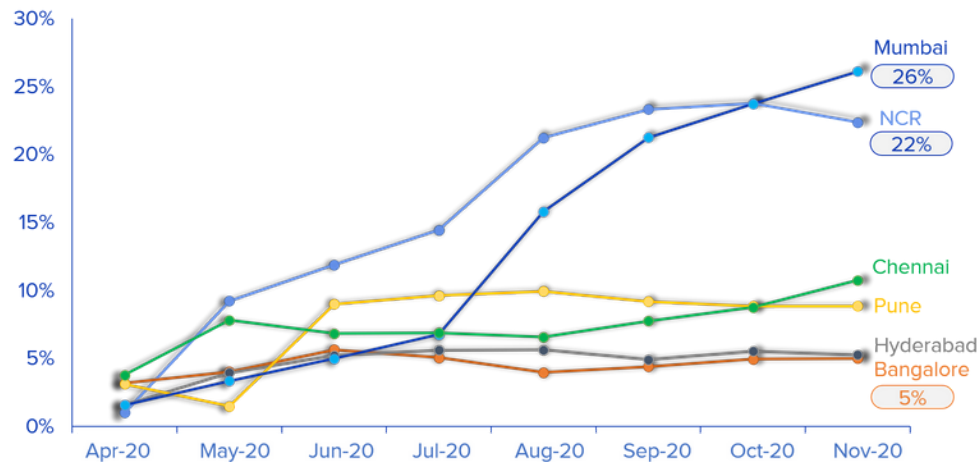
- The number of people returning to office in November 2020 has risen by 10% as compared to March 2020.
- 375% more people have returned to office in November 2020 than in April 2020.

Return-to-office growth rate vs. April'20



Source: MoveInSync

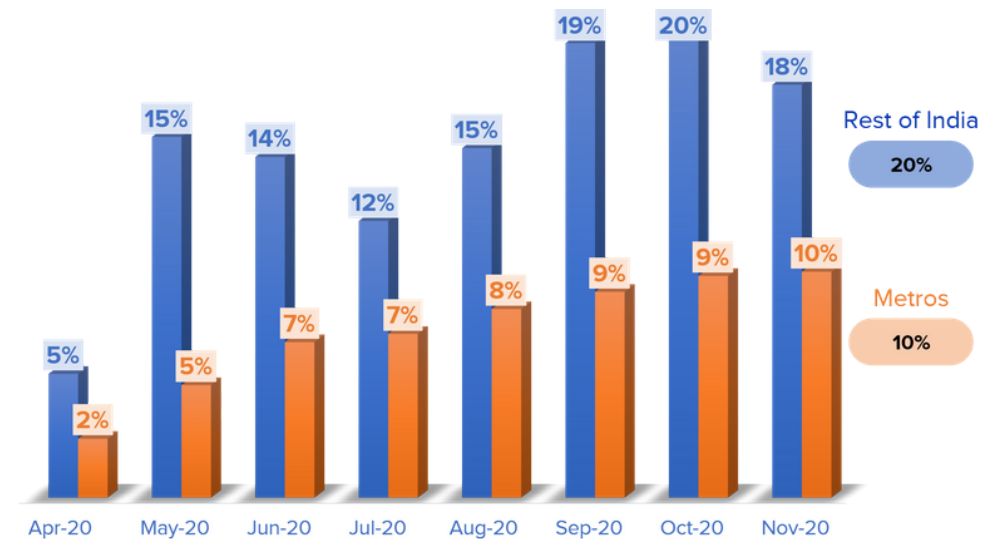
% Return-to-office levels for major metros vs. pre-Covid level (March'20)



- Mumbai and NCR are leading the return-to-office trends with 26% and 22% of pre-COVID level employees respectively.
- Hyderabad and Bangalore have only 5% of employees returning to office.

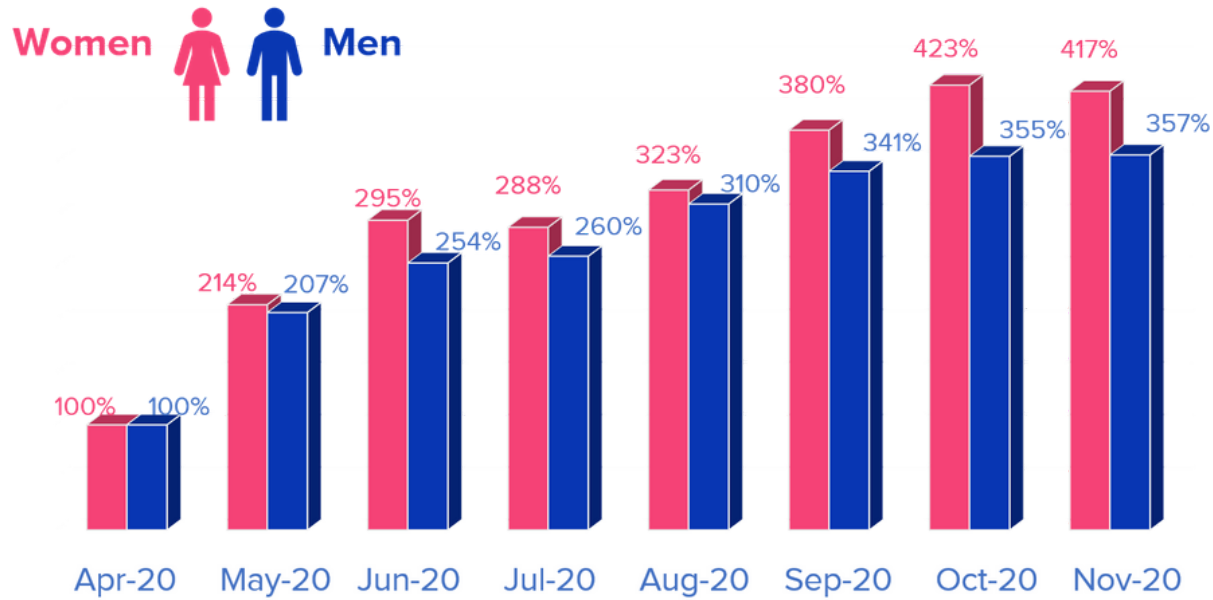
% Return-to-office in metros vs. Rest of India

- While return-to-office rate in metros is at 10%, it is 20% for the rest of India.

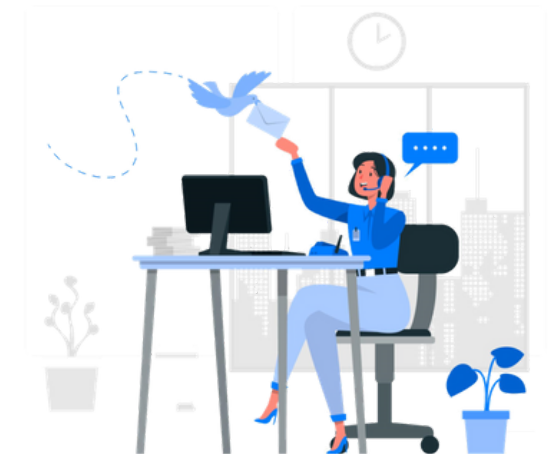


Source: MoveInSync

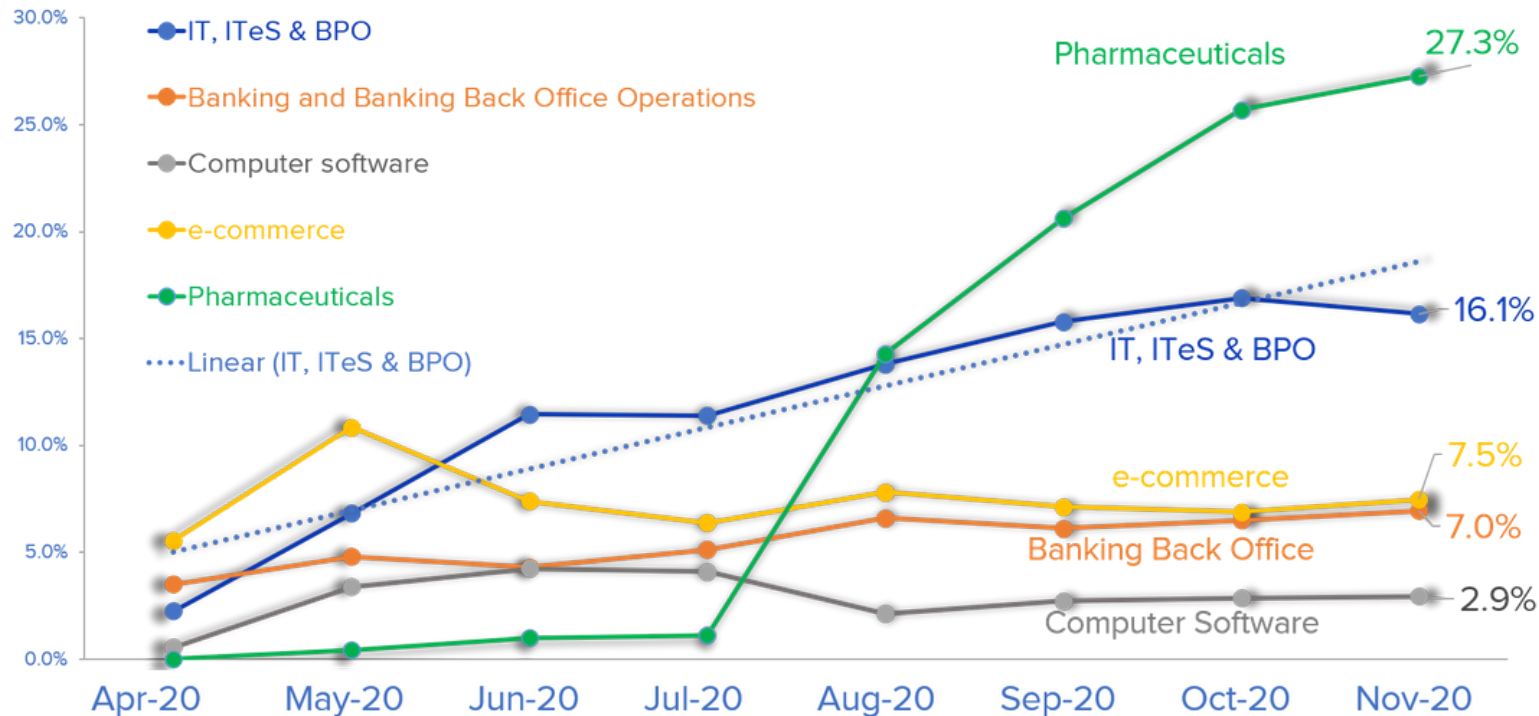
Gender-wise Return-to-office growth rate since April'20



- Women employees are coming back to the office faster than their male counterparts.

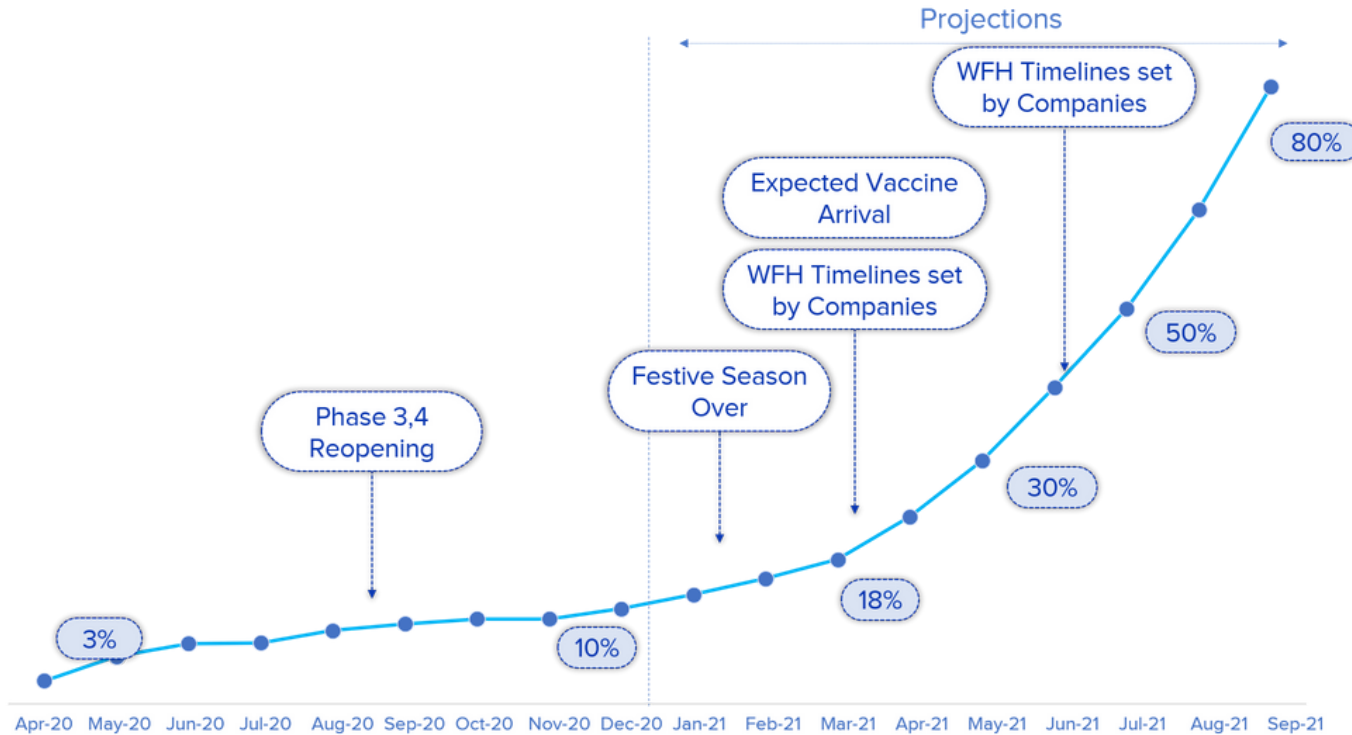


Industry-wise Return-to-office trends



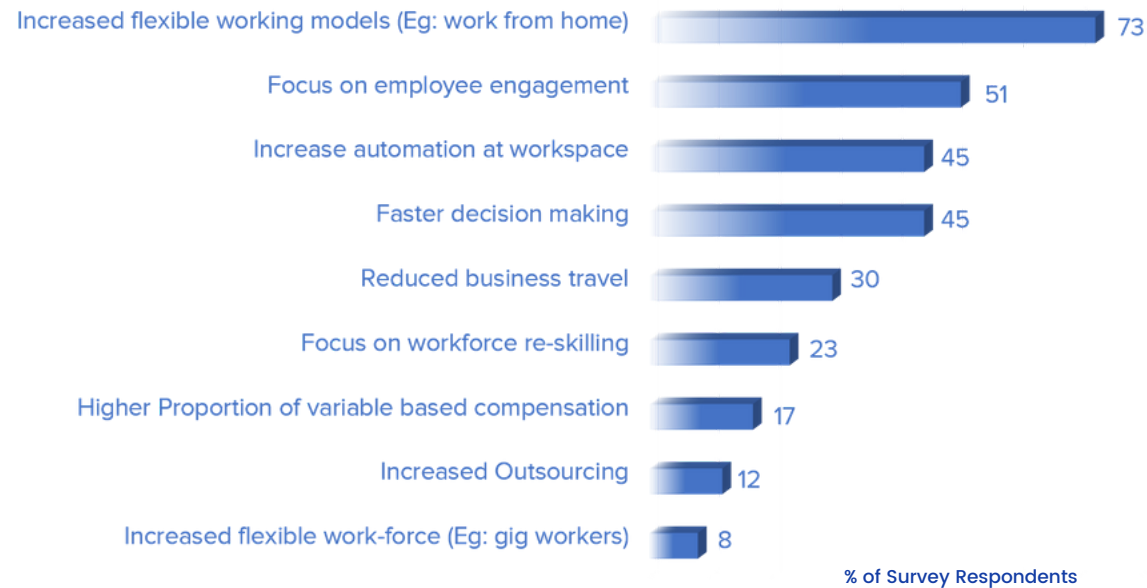
- The number of employees returning to office varies across different sectors.
- While Pharmaceuticals have 27% of employees coming back to office, IT, ITES & BPO have been showing steady growth with 16%.
- Only 2.9% employees of software companies are returning to office.

Return-to-office Projections for 2021



- Return-to-office growth rate is expected to pick-up post January'21, once festive season gets over
- Many companies have currently extended the Work-from-Home timelines for their employees till March'20 and June'21
- COVID vaccine is assumed to be available by March'21
- Considering the above-mentioned factors, the return-to-office is expected to accelerate post March'21 and is projected to reach 50% of pre-COVID levels by July'21 and 80% by September'21

Immediate priorities of Indian CEOs



- 73% of Indian CEOs are considering flexible working models as immediate priority
- 45% of respondents are also planning to increase automation at workspace



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