

India

Return-to-Office Trends

—
September 2023





Executive Summary -

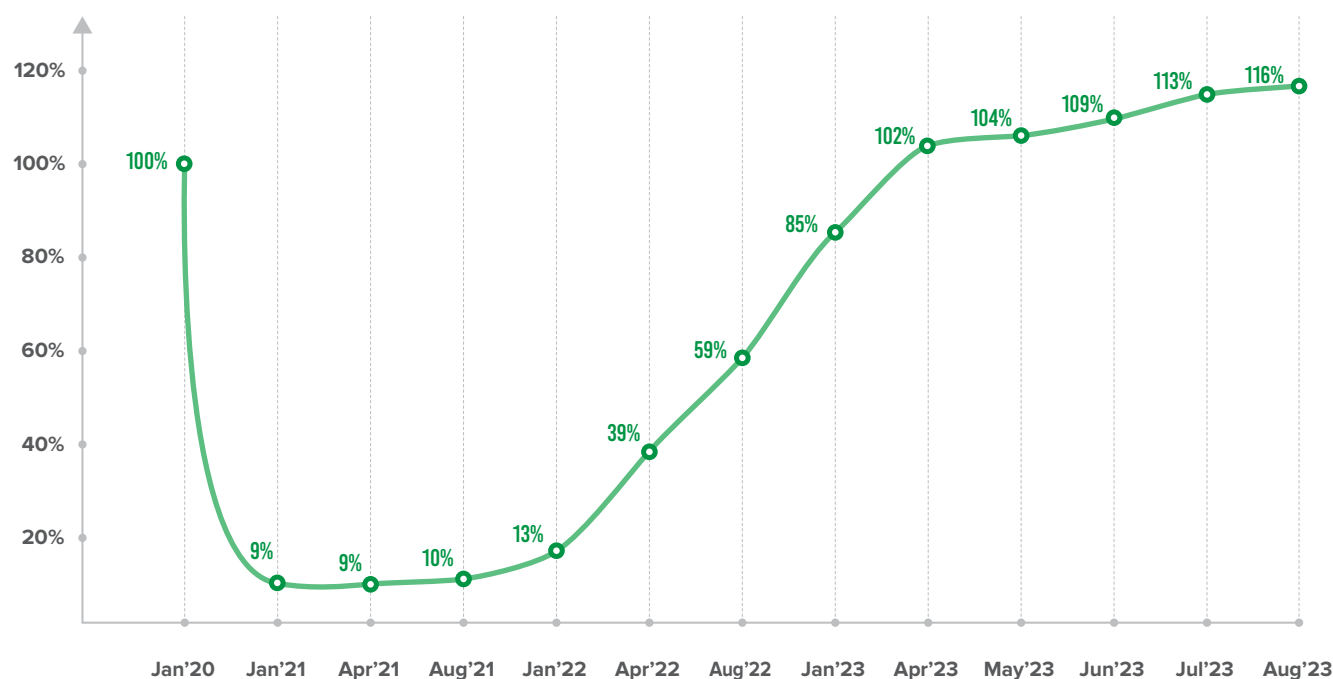
MoveInSync is the world's largest employee commute platform with a user base of over 500,000 employees across 300 clients. We have been synonymous with employee commute in India over the last decade.

We analysed our data and benchmarked how Indian employees across industries and cities are returning to the office.

In this report, we have used the following industry definitions.

1. **IT** - Information Technology encompasses the use of technology to manage and process information.
2. **Business Services** - These are companies that offer various support functions to other businesses, such as consulting, outsourcing, and administrative services (BPO/BPM).
3. **BFSI** - Banking, Financial Services, and Insurance (BFSI) is a sector that includes organizations involved in banking, financial planning, investment, and insurance services.
4. **GCCs** - Global Capability Centers are offshore or nearshore subsidiaries of multinational corporations that provide various business functions and services.
5. **Internet Technology** - Internet Technology companies refer to businesses specializing in internet-based products, services, and technologies.

India's Return to Office* stood at 116% of pre-Covid levels in August 2023.

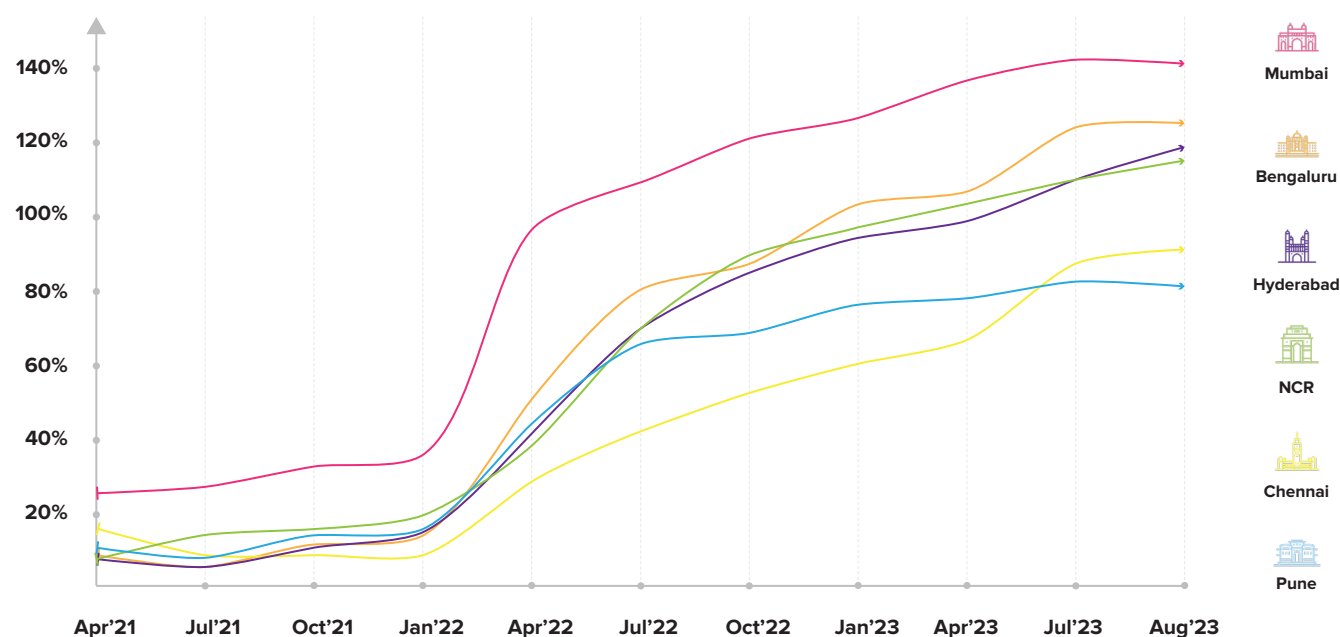


India's RTO

Of the major Indian cities, Pune has embraced remote working the most, with only 80% of employees back in the office. This is driven by a majority of Pune employees being from miscellaneous sectors, that have low RTO numbers.

Chennai, which was lagging behind Pune till last quarter has seen a spurt in IT employees coming back to the office from July (67% higher than June). This resulted in an overall RTO of 90% in August.

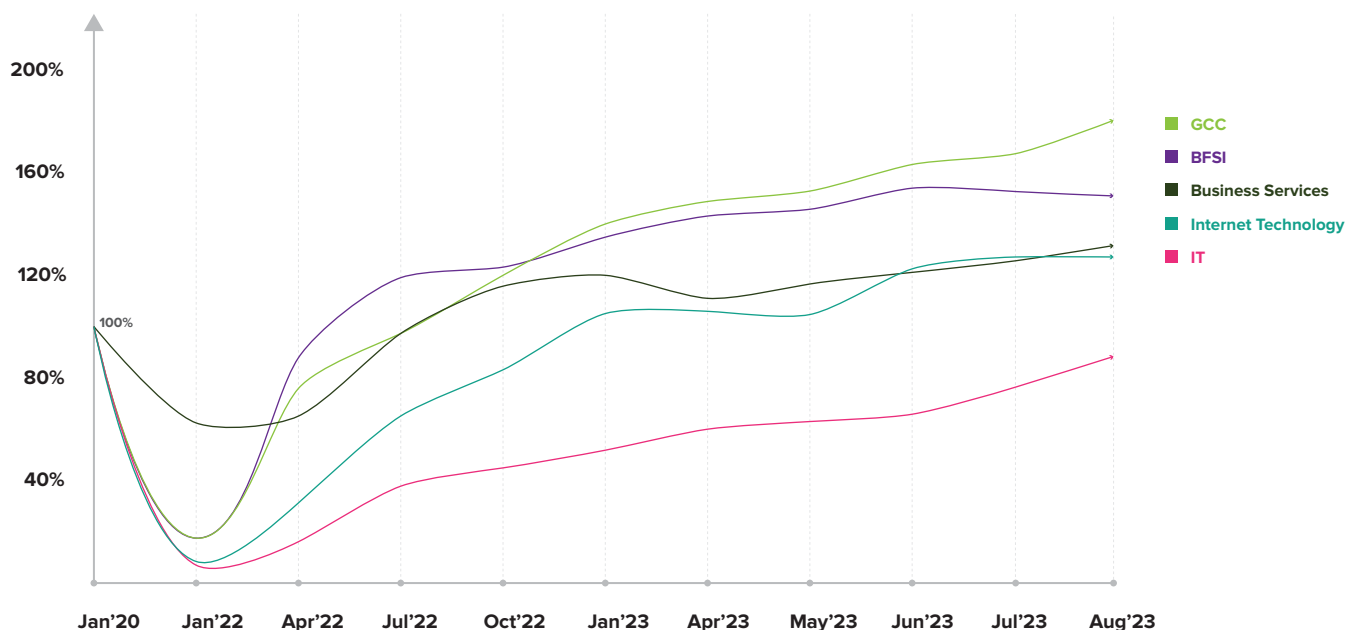
Mumbai has the highest RTO number at 141% of pre-Covid, primarily because 70% of Mumbai's employees are from the BFSI sector, that is seeing a high RTO.



RTO of Major Cities

*Return-to-Office (RTO) is defined as the ratio of number of employees who worked from the office in a given month to the number of employees who worked from the office in January 2020.

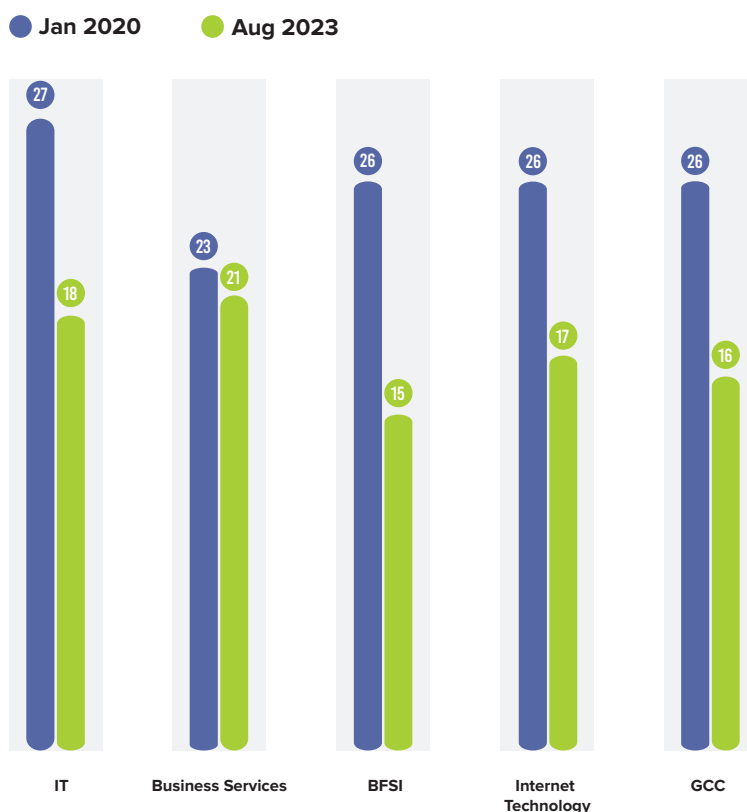
Indian GCC employees are back to the office in high numbers, with the GCC sector RTO at 180% compared to pre-Covid. The IT sector lags behind, but has seen the steepest spike of 35% in the last two months.



RTO by Major Industries

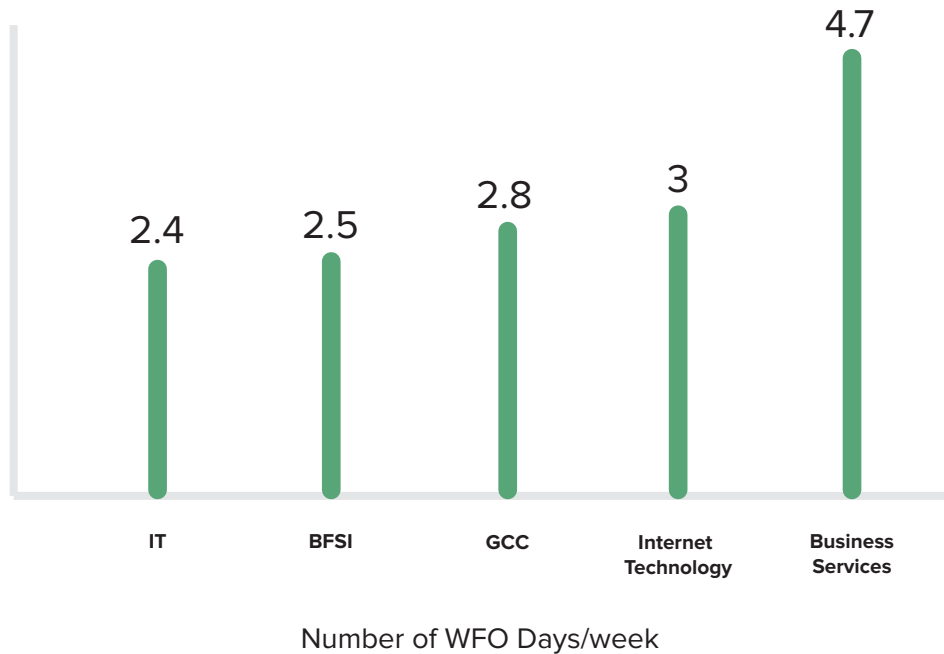
Interestingly, despite more employees coming back to the office now compared to pre-Covid, they are spending fewer days in the office each month.

Across industries, the average rosters/month is lower now compared to pre-Covid.

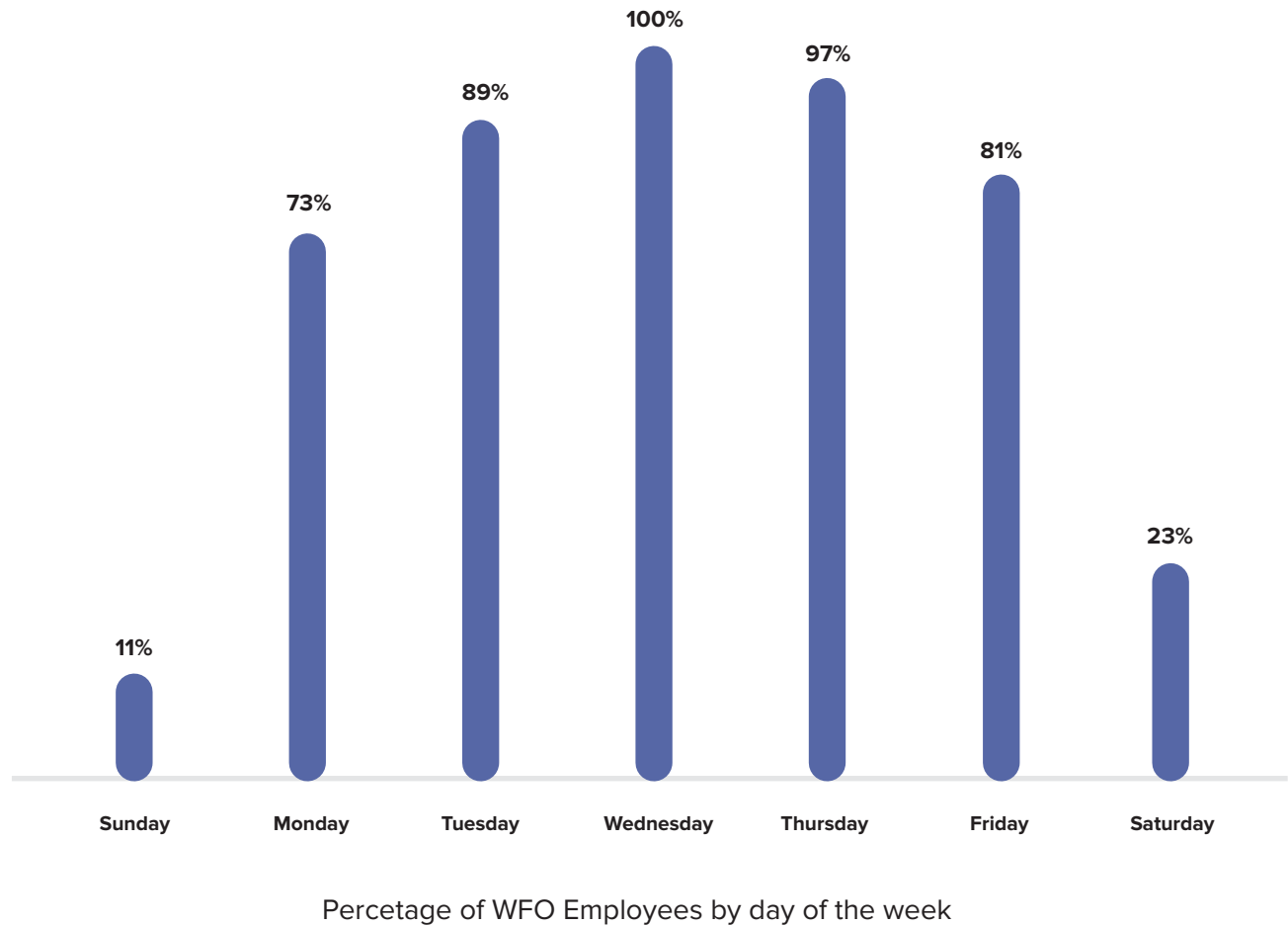


Average Rosters per Employee

The Business Services Industry has almost phased out hybrid working, with employees being in the office almost everyday. But the IT and BFSI industries are still embracing hybrid work.



Wednesday is the most preferred day for employees to work out of the office on, closely followed by Thursday. While Monday is the least liked day.



About Us -

MoveInSync is the world's largest employee commute platform with a user base of over 500,000 employees across 300 clients. Headquartered in Bangalore, India, MoveInSync has been a pioneer in the commute space since 2009, offering reliable, safe and sustainable solutions.

MoveInSync empowers organisations to reduce carbon emissions using shared commutes, optimising their fleet mix, as well as adopt electric vehicles.

MoveInSync's SaaS solution, Ion, automates employees' office commute using cabs, EVs, and shuttles; and manages corporate car rentals.

MoveInSync's full stack solution, MoveInSync One is an end-to-end employee transport solution for enterprises, integrating fleet, technology, and operations.

