



Employee Perceptions in COVID Scenario

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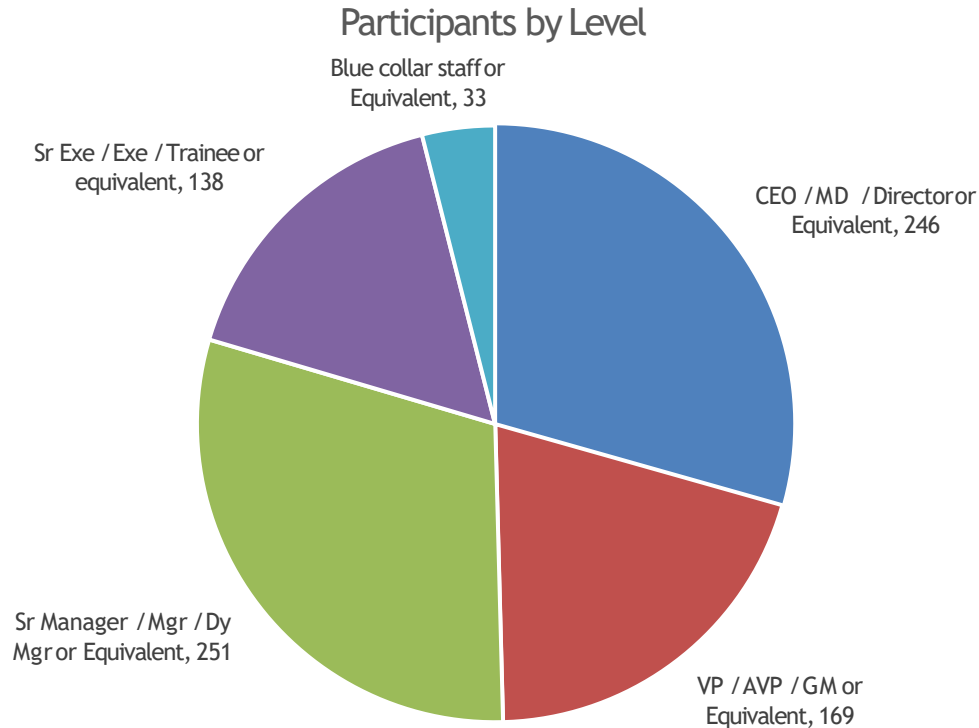
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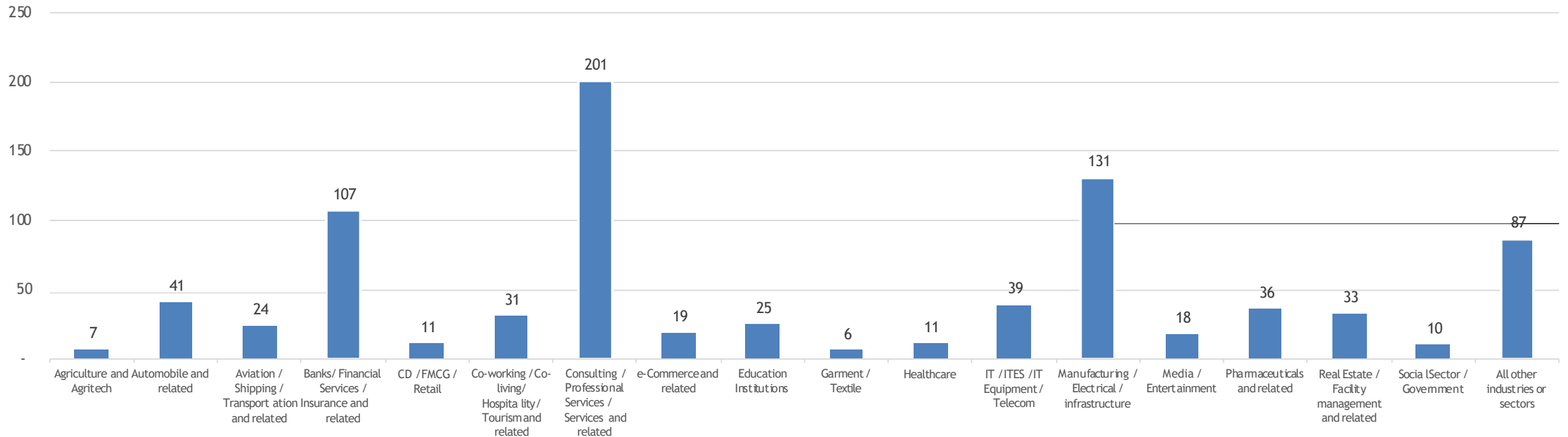
- As the uncertainty grips businesses and human transactions, organizations will be forced to take decisions which will help them manage this uncertainty in a manner that can help them recover in the shortest time and with the least disruption.
- As organizations choose amongst the various alternatives, some that have been tested in previous financial crises, and some which are new, it is important to know that these times are as much uncertain for employees as they are for organizations, therefore to ensure that organizations take decisions which are balanced, mature, humane and yet financially prudent, it is important to understand what employees are feeling and how they perceive their organizations to react in perspective to their future.
- This survey collects perceptions of employees to many such questions that organizations may be considering in the near future for sustain themselves. We believe that this information will give a perspective on which audience to focus on, and, which are the decisions which will require a harder convincing compared to decisions which will require a relatively lesser convincing. This survey also projects some other expectations that are going to change the way employees work at the workplace and their expectations from an employer.
- Whatever be the road ahead organizations take, they need to remember, it is important to manage perceptions and communications with employees as much it is important to manage financial prudence to be a successful organization which can scale through these times.

- The data, which was collected by way of an online survey from 26th March 2020 to 20th April 2020, got 1298 responses out of which 837 qualified to be included in this survey report. The responses were received by way of an open survey and employees from 837 organizations, across levels and across sectors participated, thereby giving a good broad-based overview of employee perception in relation to the COVID scenario India is facing today.



- The data, was segregated to include unique responses, where more than 1 employees responded from an organization, their data was merged to calculate a single organization number and then it was mapped into the overall number.
- The sectors of Agriculture and Garment saw less than 10 organizations participating, therefore while data has been mapped for them, it may not represent the true perception of employees in those sectors given the small sample size.

Unique Participants by Industry

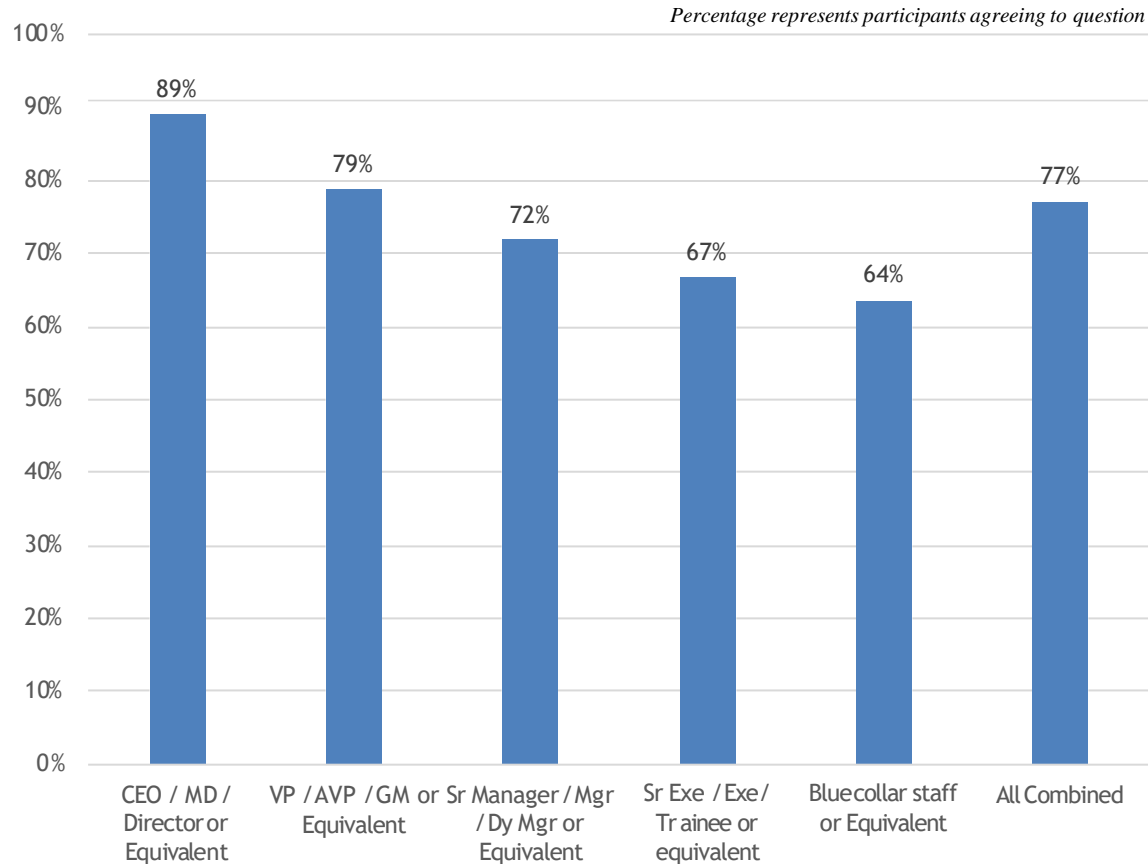


1

Employee perceptions
by question



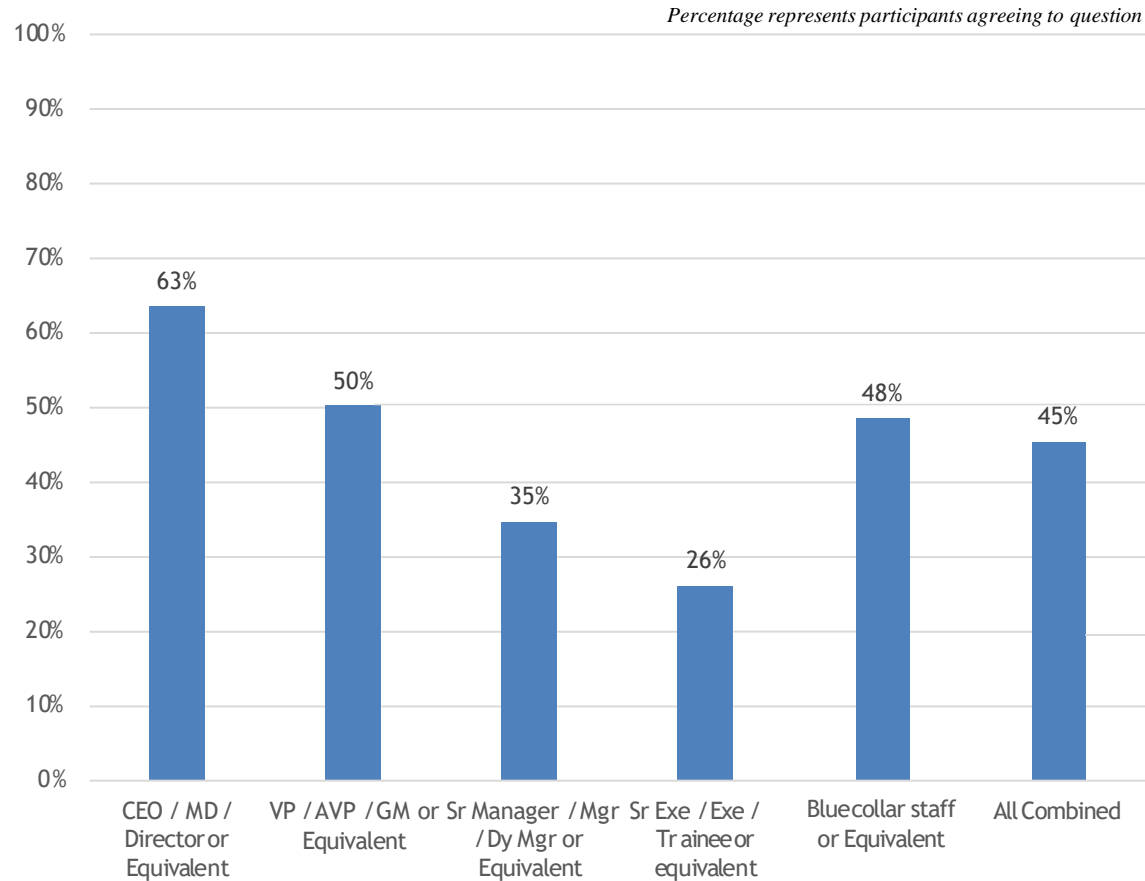
Postpone Salary Increment



The idea of postponing salary increments seems to be somewhat fine with a large proportion of employees across all levels. We believe since the lockdown has closed majority of the businesses, it is but natural for all to wait for increments and other processes to be initiated only post the normalcy returns.

With 77% respondents showing comfort in the idea of increment postponement, this seems to be a well-known aspect to employees.

Implement Salary Cut

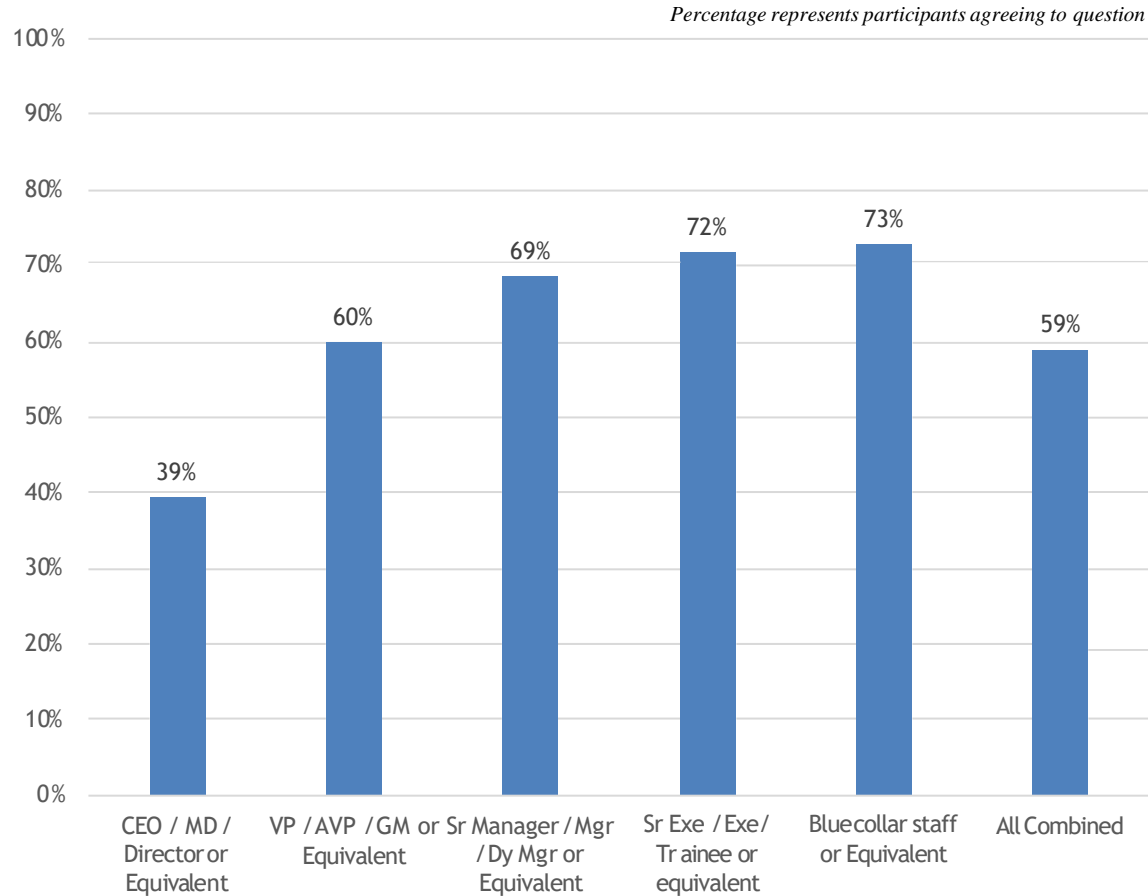


Implementing salary cuts will have to be a well thought out process, as the junior staff have a very low acceptability of this, the Executive, Sr Executive and even the middle management Sr Managers etc have not seen this as a very welcome aspect of the COVID-19 scenario.

While the CEO/MD group has a tilt towards salary cut, their immediate second line is still divided on this aspect.

This clearly reflects that if this is the option an organization chooses, then there should be a good amount of resistance that will have to be overcome by way of planned communication and trust.

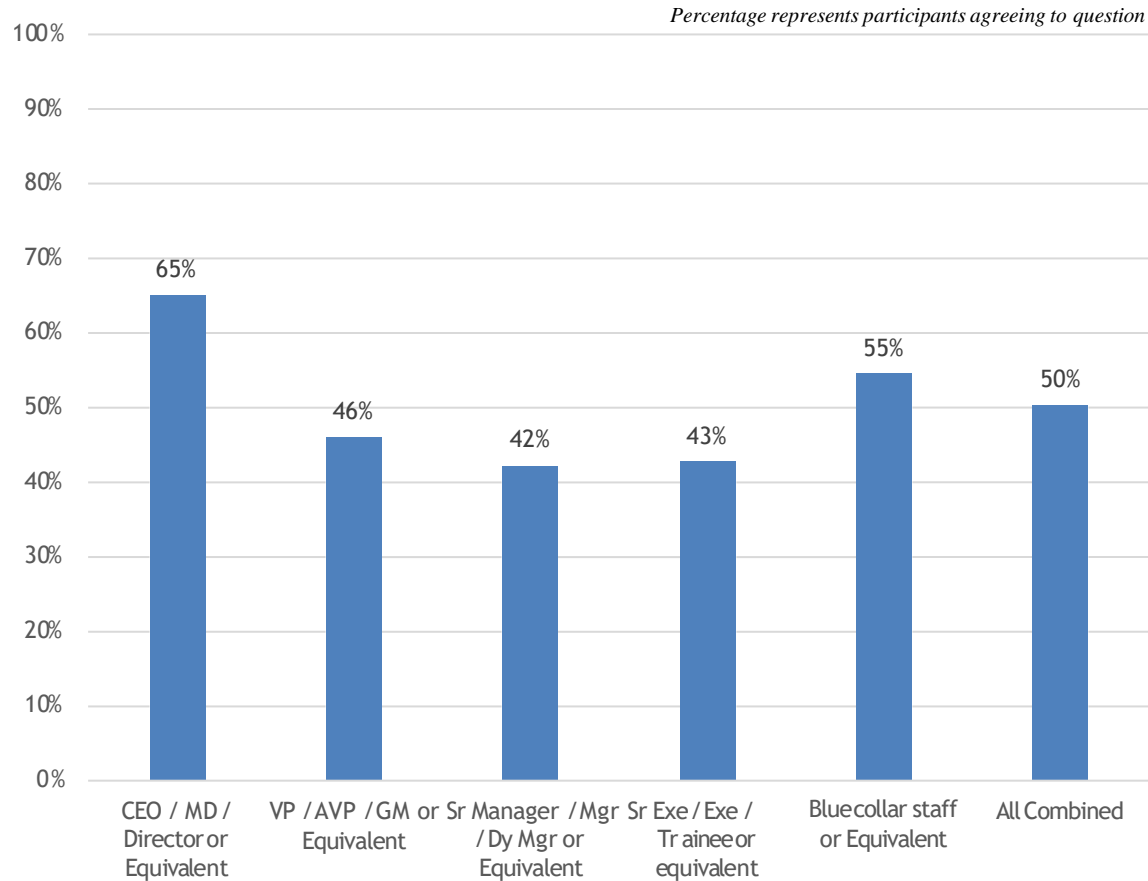
Give average 8-10 % salary increment



When asked about a totally different question from salary cut, the groups show somewhat similar reactions. The Junior-most expecting a salary increase to be there, whereas the CEO/MD having the least agreement to provide a salary increment.

There does seem to be some level of overlapping, who seem to be fine with salary cut and salary increase, the open-ended comments from the survey gave a view that they believe that the organization will do these on a selective basis rather than standard for all. Therefore we would like to believe that these overlapping participants are fence sitters who would be fine with either side as long as the convincing is done properly.

Don't Pay Bonus

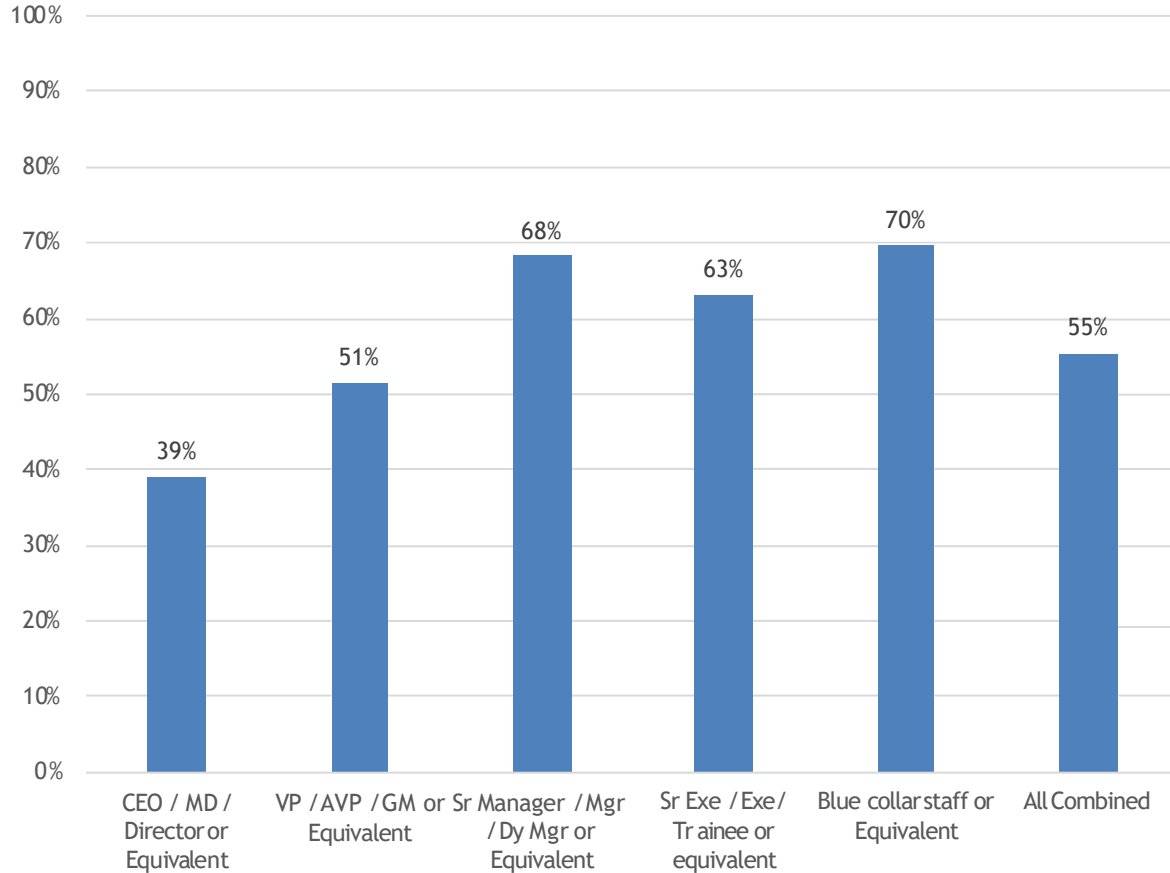


Acceptability of not being paid the bonus isn't that high, while it is surprising that blue collared workers are the most acceptable group after the CEO/MD group to not being paid bonus, our opinion is that this is primarily as majorly this is the staff which is more worried about job security and long term sustainability rather than immediate personal cash flows.

Rest of the groups seem to be tilting more towards not agreeing to cancelling the earned bonuses.

Give 10-15% Bonus

Percentage represents participants agreeing to question

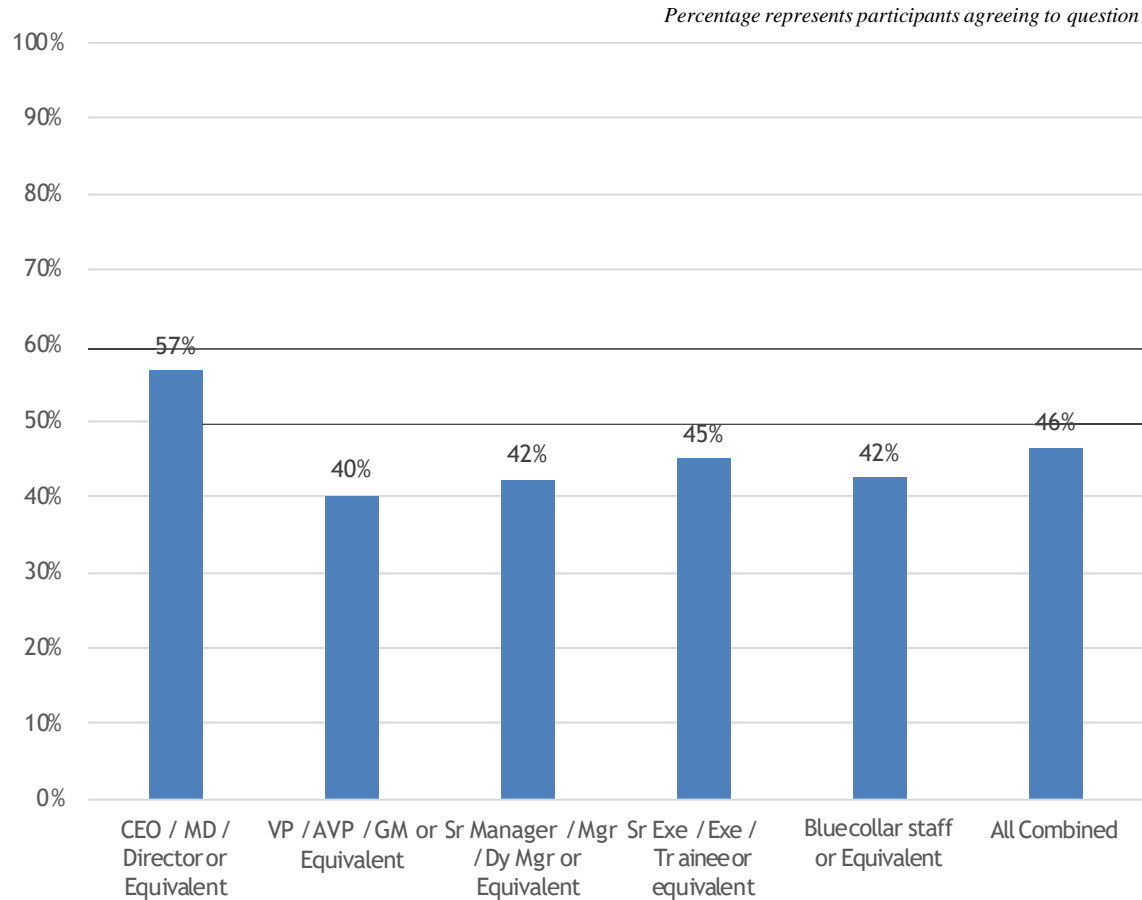


A similar question asked about bonus, also states a similar view from almost all groups, with overlaps to some degree where employees feel that bonus will not be cut or given to all on a standard basis, but will be given on some criteria. Therefore we would like to believe that these overlapping participants are fence sitters who would be fine with either side as long as the convincing is done properly.

The junior most employees seem to be accepting a bonus to be paid, compared to the senior most who are not accepting a bonus to be paid.

Any action in relation to not giving bonus will also have to be planned by way of a strong trust champion and communication plan.

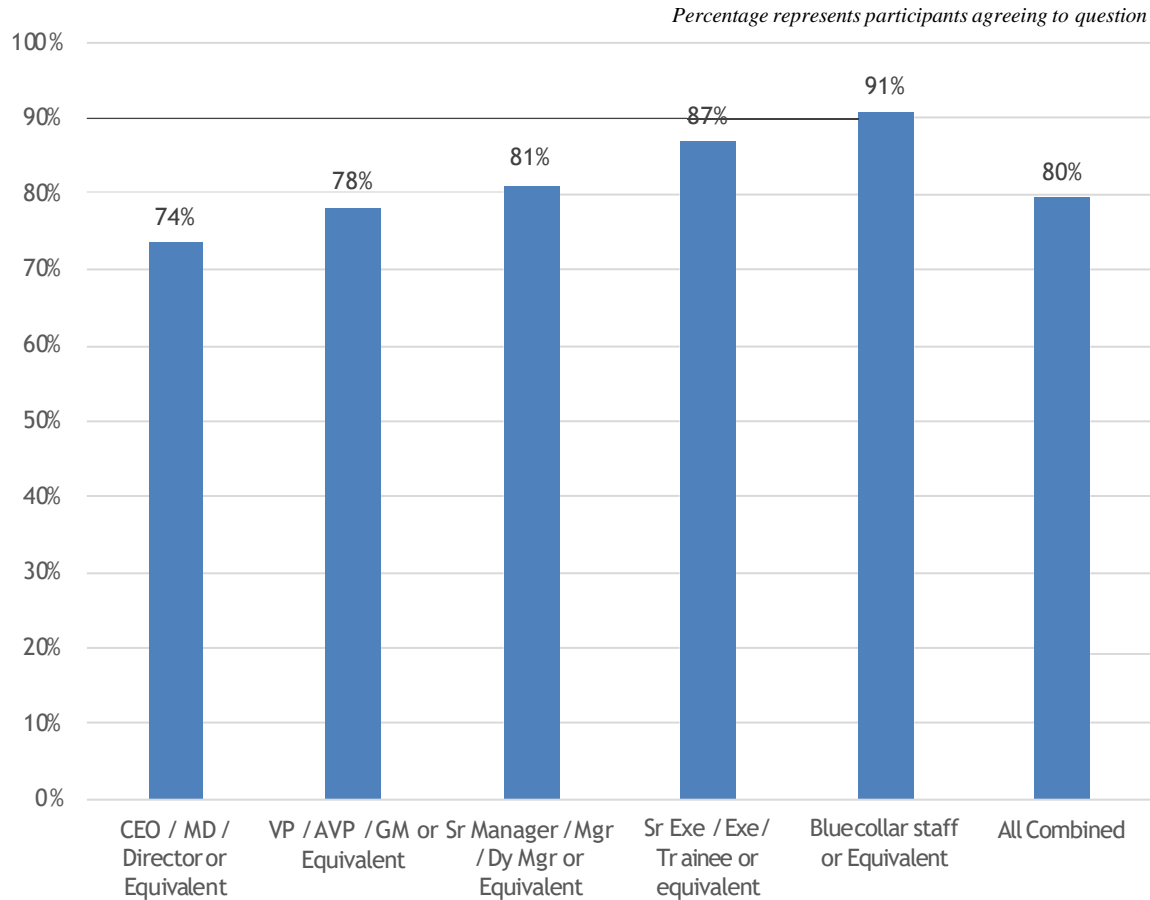
Retrench Employees



While on an overall basis retrenching employees doesn't have a high level of acceptability, it clearly brings out that the workforce is aware that this is a possibility and they are prepared for this.

What is of a different dimension is the higher-level acceptance to retrenchment than to salary cut (slide 8).

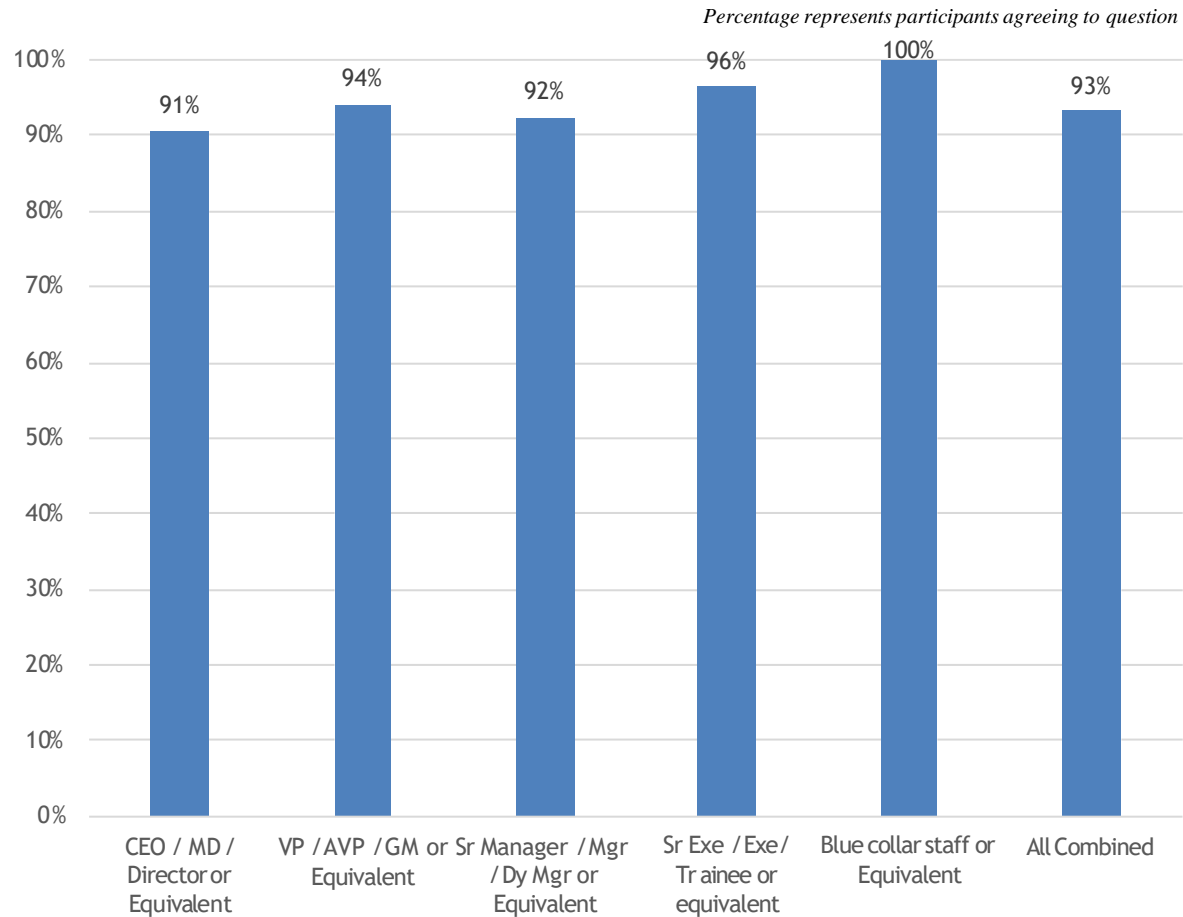
Work From Home to Be Standard



A cultural change that is being ushered in and seems like an inevitable aspect that organizations will have to prepare for is the Work from home concept. Almost all groups seem to want that work from home concept should be a standard acceptable practice even after the COVID mandated rules are removed by local authorities.

Given the cultural acceptance and trust involved in work from home, this is an area that organizations will now have to focus a lot, not only from an employee demand standpoint, but also from a Business continuity standpoint.

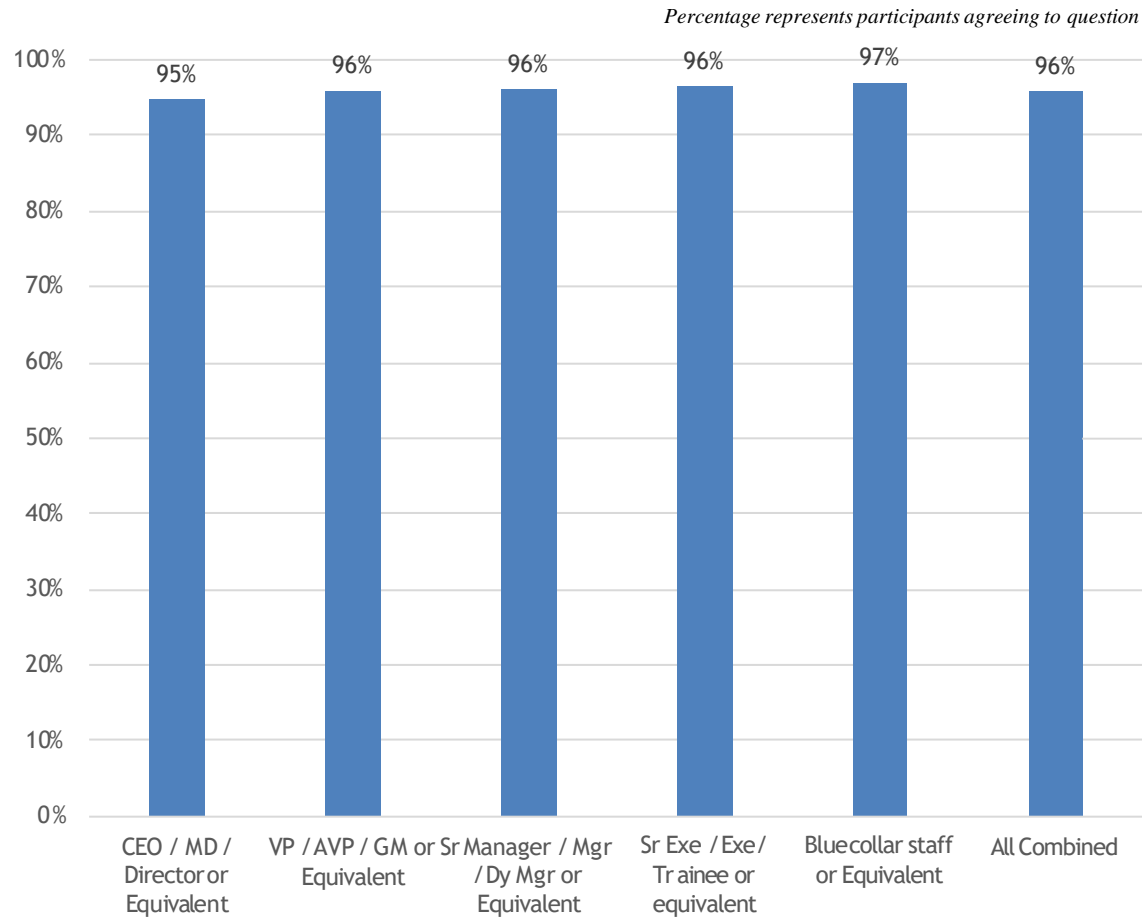
Health Check-Up Mandatory



Focus on health and health checks has never been so high, almost all groups are closer to 100% seeking mandated health checkups for all employees on an annual basis.

This will be a new standard that will have to be offered by organizations as a work tool to employees.

Improve Work Infrastructure & Hygiene

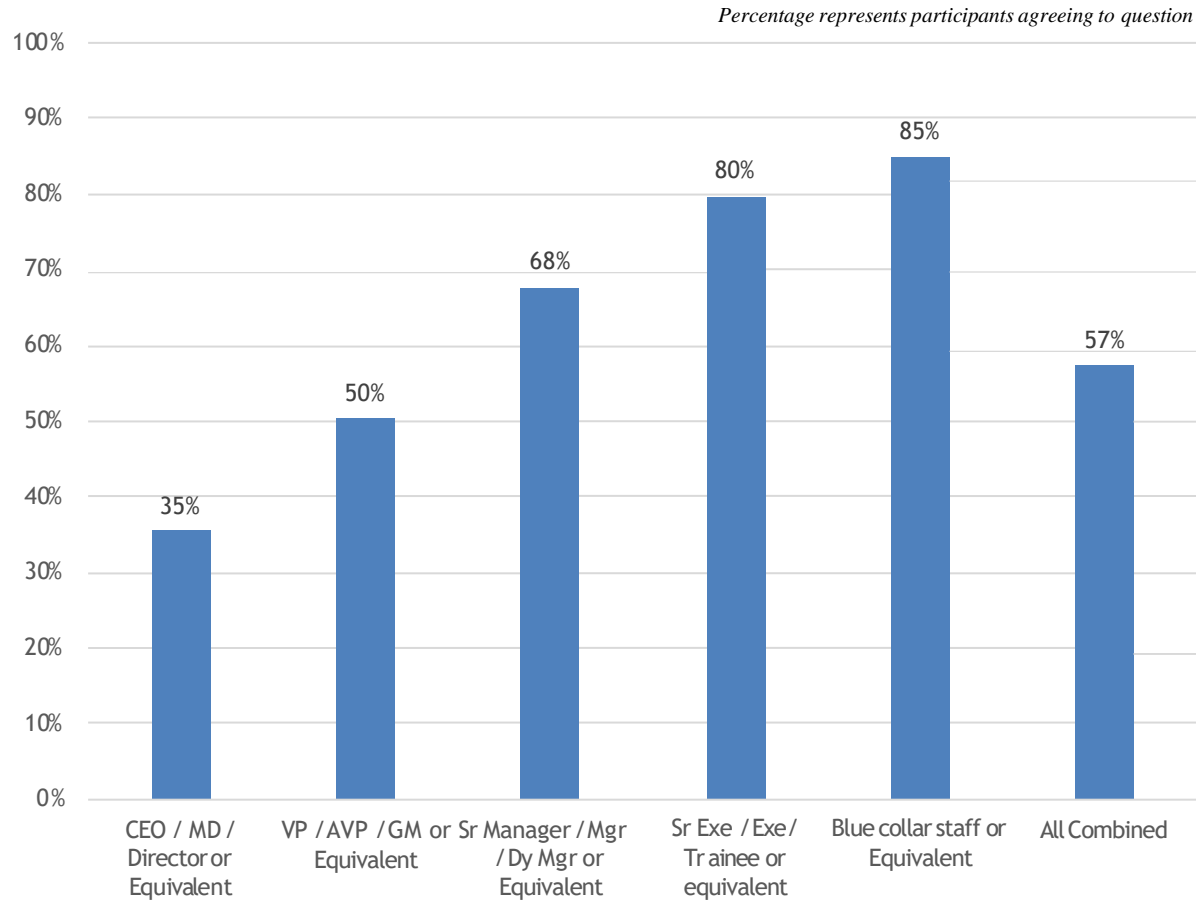


A very surprising aspect that came about in the survey was the expectation from all group and again closer to 100% that the present work infrastructure and work hygiene in their workplace needs improvement.

This has seen supporters not only from all groups, but the need for improvement was also expressed by the CEO / MD groups.

There is clearly a higher level of focus by all concerned now on infrastructure and work hygiene.

This Will Not Impact My Company's Ability to Take Care of My Career



This question was asking how much faith each group is putting in the organizations ability to take the impact of the environmental crises and not let it pass the same to them.

As you see, the junior the employee the more they feel that the company shall protect their career, and the senior the employee, the less likely they believe that the organization can protect the career.

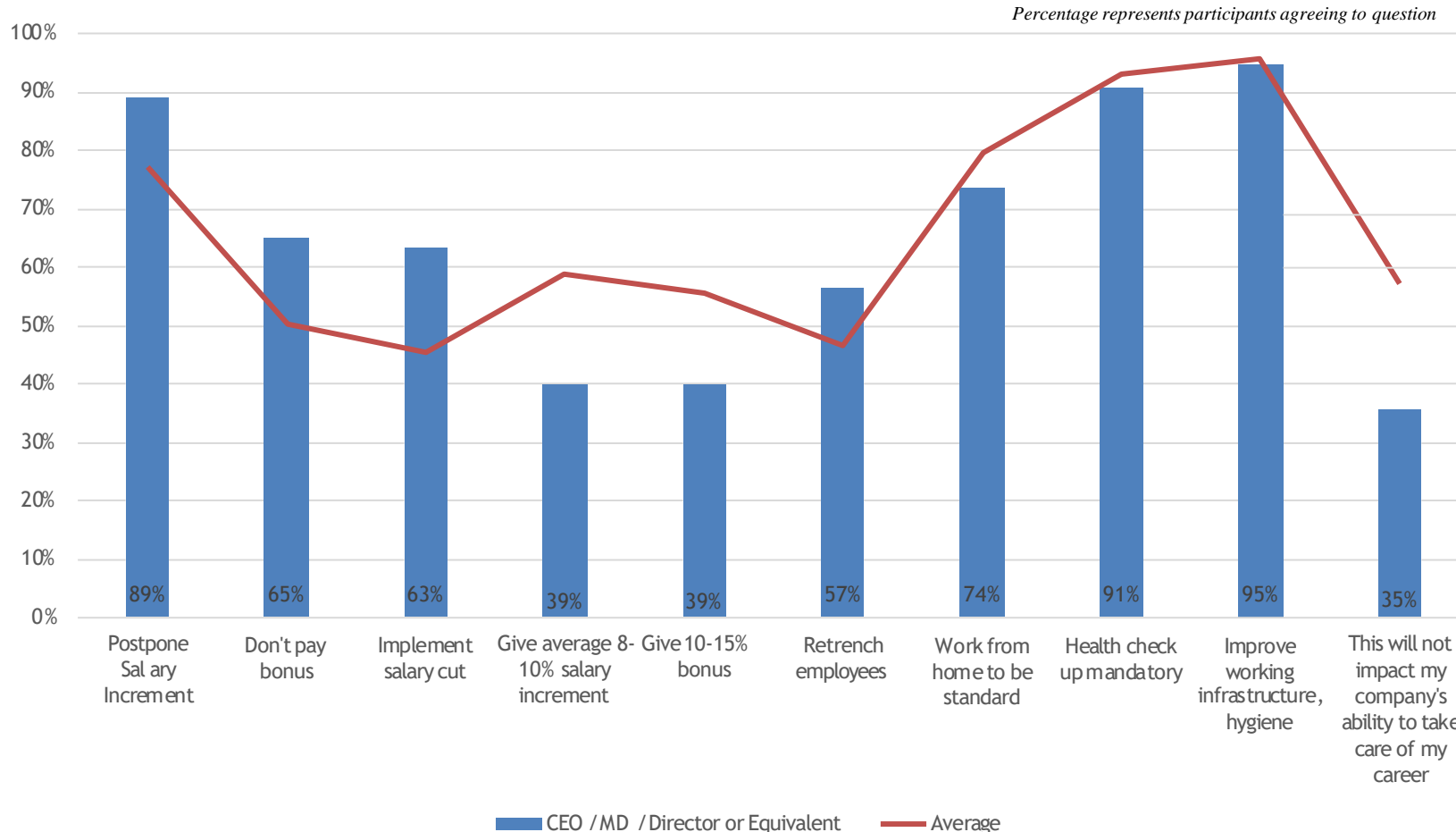
In short, this one slide summarizes the entire perception that employees have from the organization. Whatever steps the organization takes, should be graded to have different impact on each group, a one standard action may not be suitable for long term sustainability and for restarting.

2

Level wise compared
to all responses



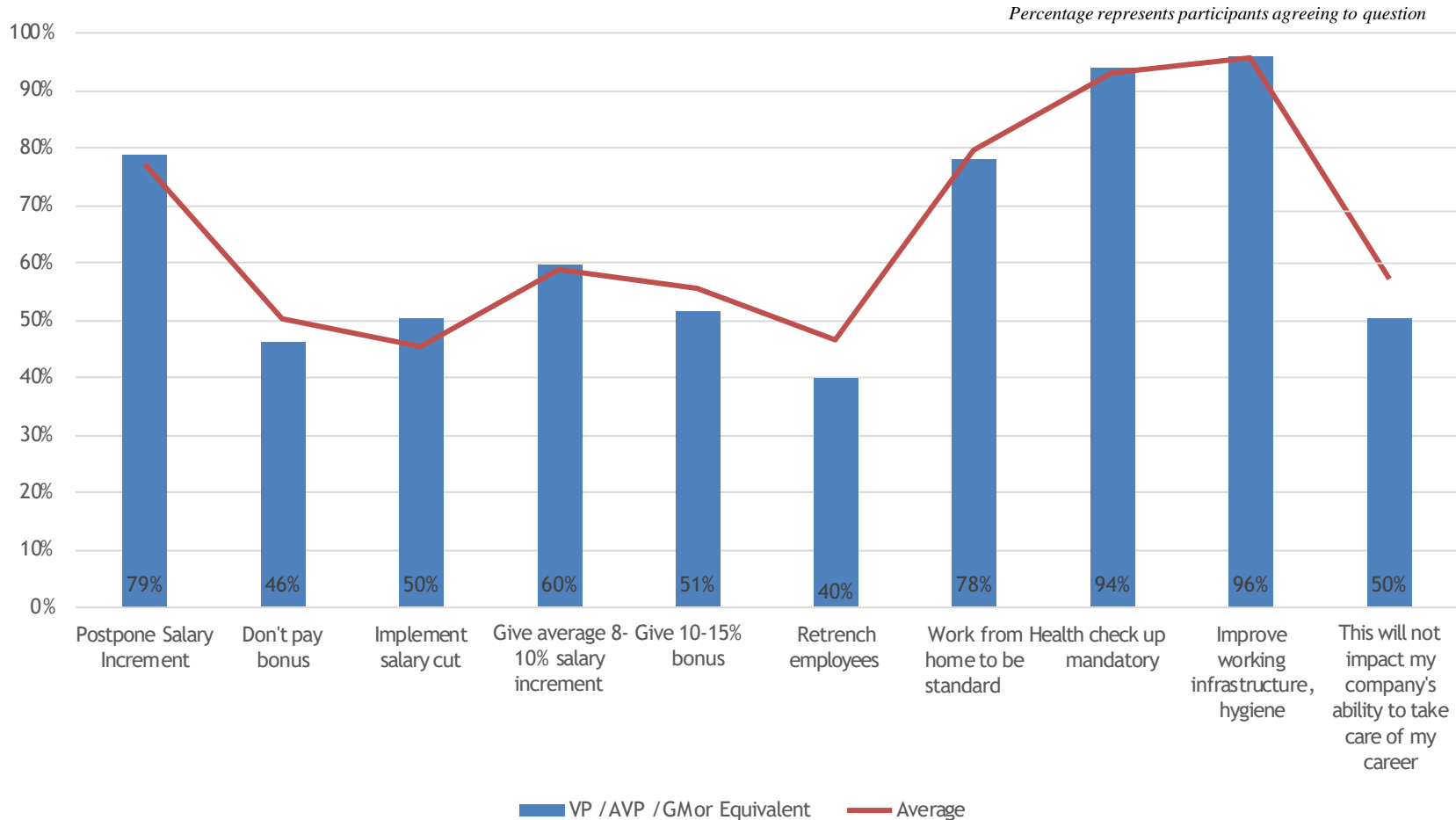
CEO's / MD / Director



When compared to all employees, the CEO/MDs as a group seem to be less inclined to give a salary increment and bonus than the average of others. they also seem to be less likely in believing that the organization can protect their careers.

This group however is more inclined on cost saving interventions like postponing increment, salary cuts, retrenchment and cancelling bonus compared to average of all.

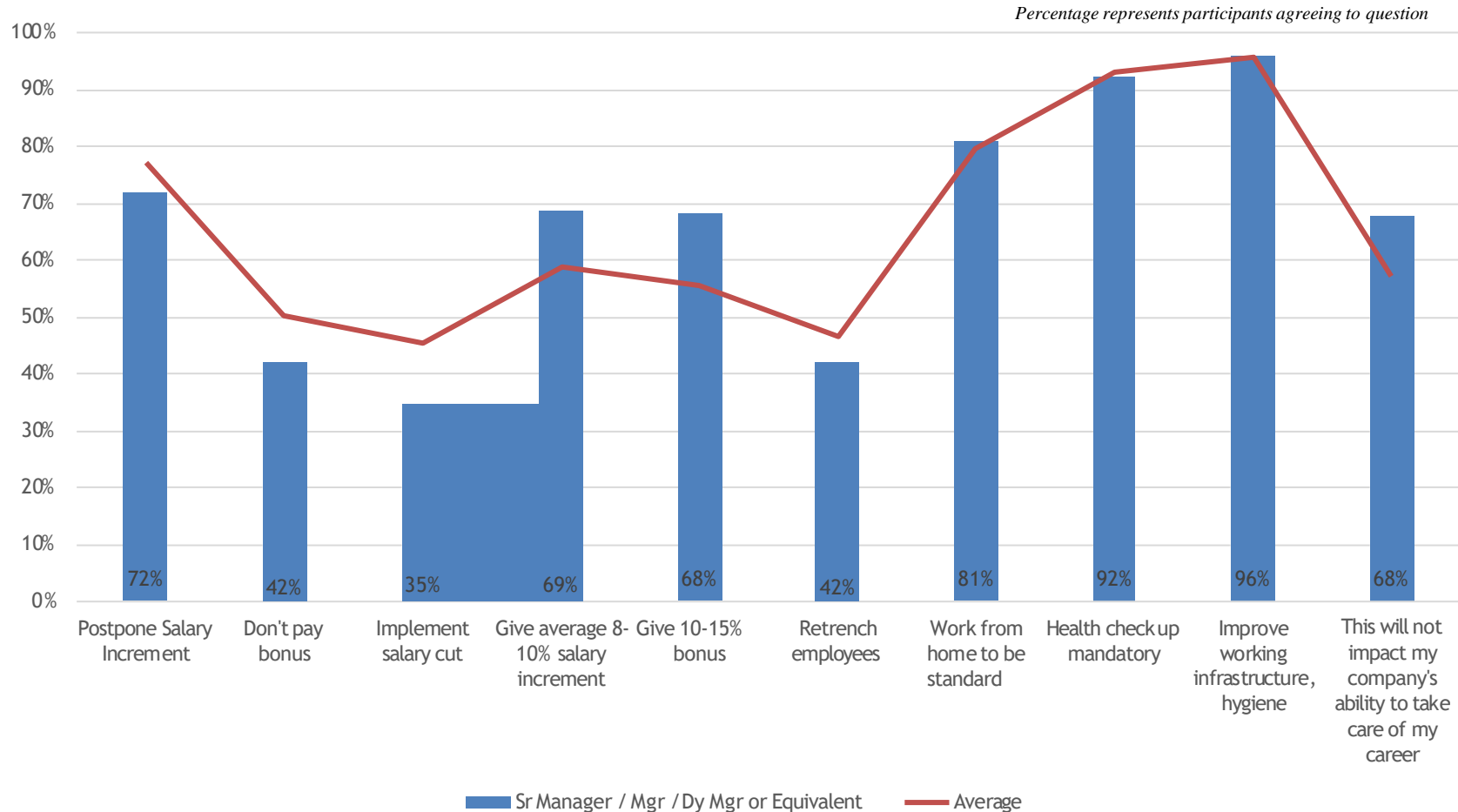
VP / AVP / GM



The organizations second line seem to be in alignment with the standard average, hence it would be important to ensure that this group is convinced about the action steps before the organization at large is informed about the steps taken.

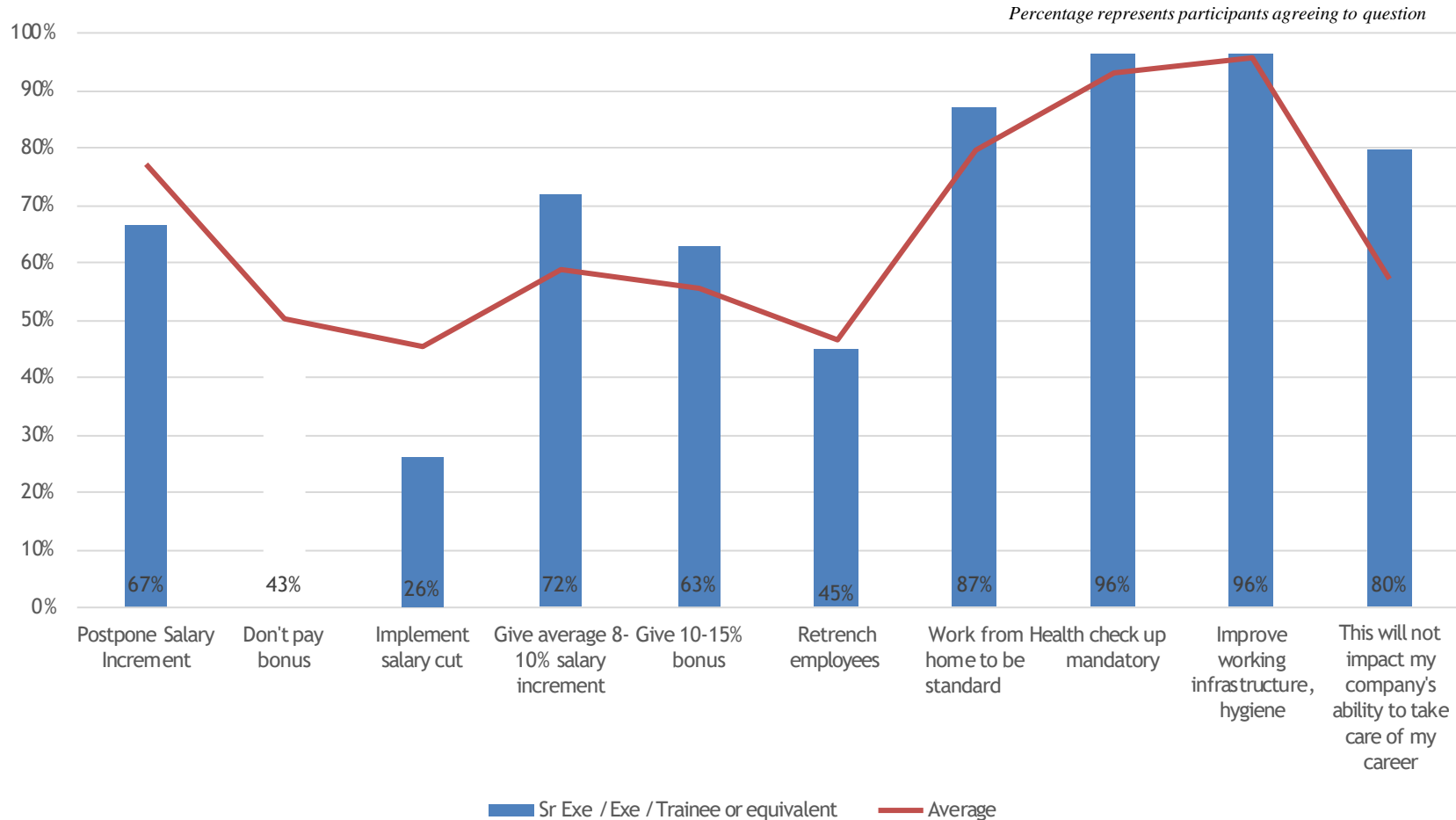
The key point however being that compared to all employee average they are more inclined on not retrenching employees.

Sr Manager / Manager / Dy Manager



The middle management or people managers in the organization are below average when compared to all employees in relation to negative impact on employees, like areas of cancelling bonus, salary cut and retrenchment. They however, have a higher belief than the average in terms of organization taking care of their careers. This group can cause higher degree of time consumption before a decision is taken and rolled out. Not to forget that they believe that salary increment, and bonus should be given.

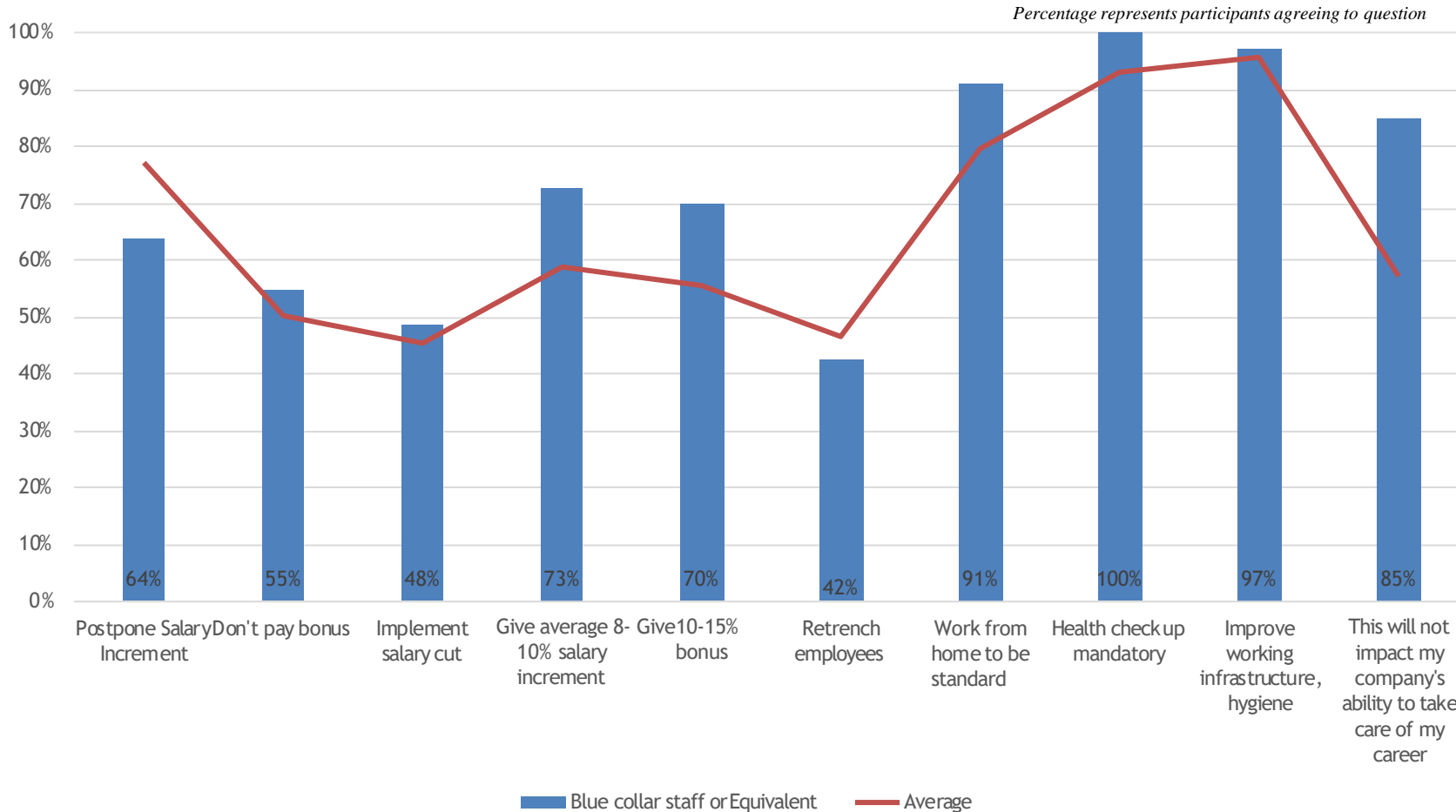
Sr Executive / Executive / Trainee



The junior most employees reflect the views of the middle management, except that they are more amplified. They are not keen on negative impact actions and are below the average of all employees. They have a higher degree of trust that the organization will protect their careers, while expecting a salary increment and bonus.

It would be very important to involve this group in the decision-making process directly, as this is the group which doesn't have voice.

Blue Collar Staff



Though the sample size of this group is the lowest, it still gives us some insight on how they feel. While they are close to average when it comes to salary cut and cancelling bonus.

They seem to be having a lot of trust and faith in the organization to protect their careers and are below average for retrenching employees.

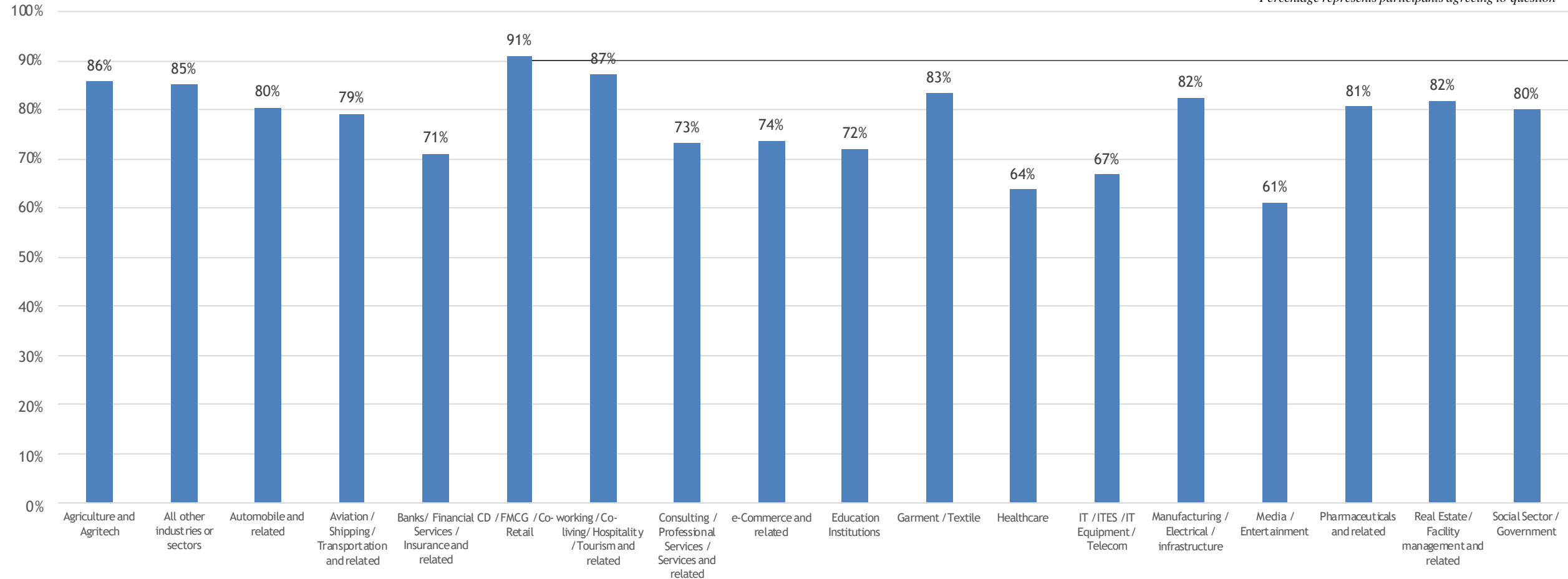
3

Industry wise
perception by question



Postpone Salary Increment

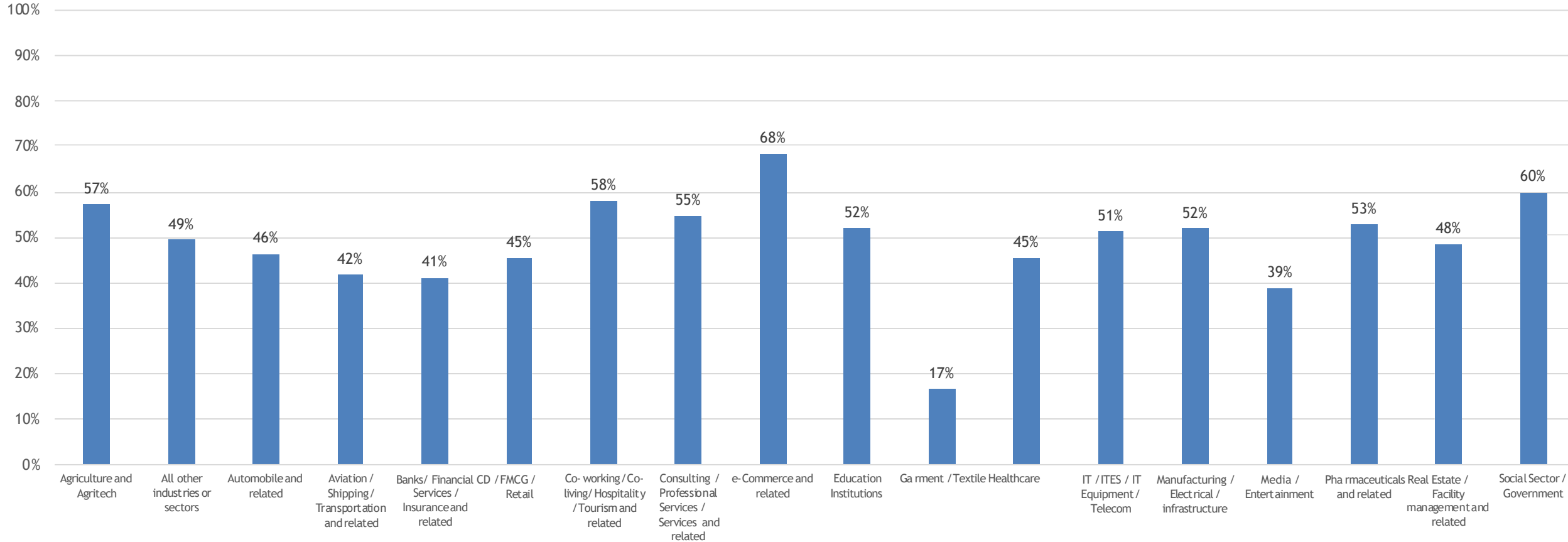
Percentage represents participants agreeing to question



CD (consumer durables) FMCG and hospitality tourism seem maximum in agreement, whereas healthcare and media seemed least in agreement. Despite this, none of the industries gave a score less than 60% agreement, which is more of less an acceptance.

Don't Pay Bonus

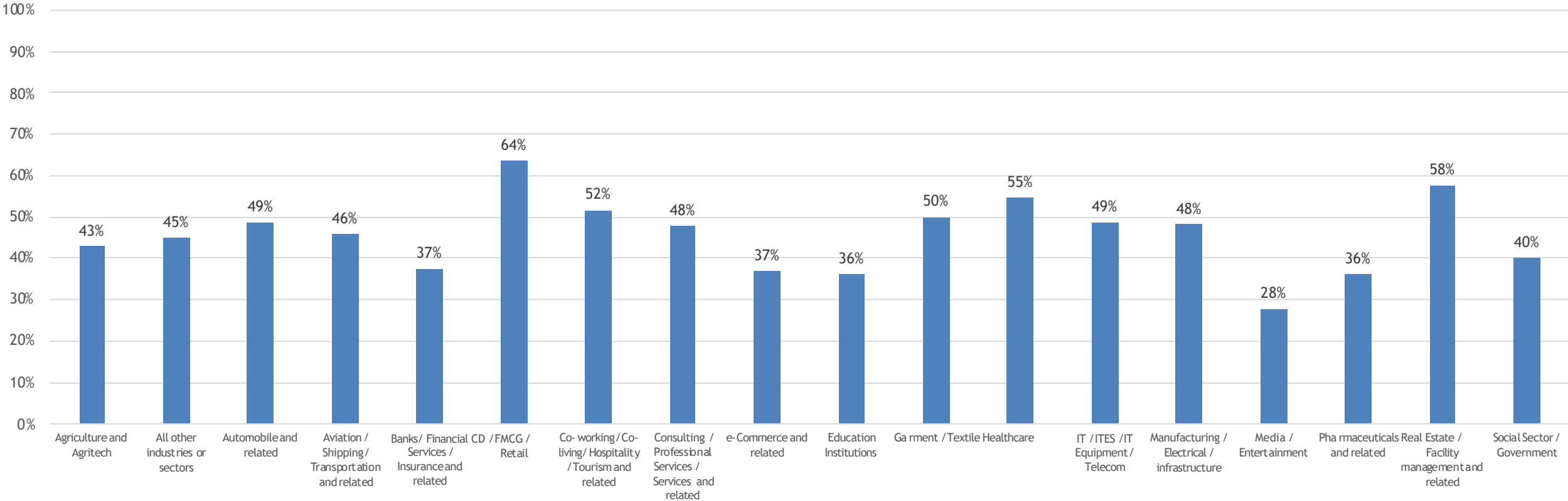
Percentage represents participants agreeing to question



e-commerce seems to be maximum in agreement to not pay bonus, whereas the garment being least in agreement to not pay bonus. Almost all industries except them are having as many agreeing and disagreeing, thereby not demonstrating a clear mandate.

Implement Salary Cut

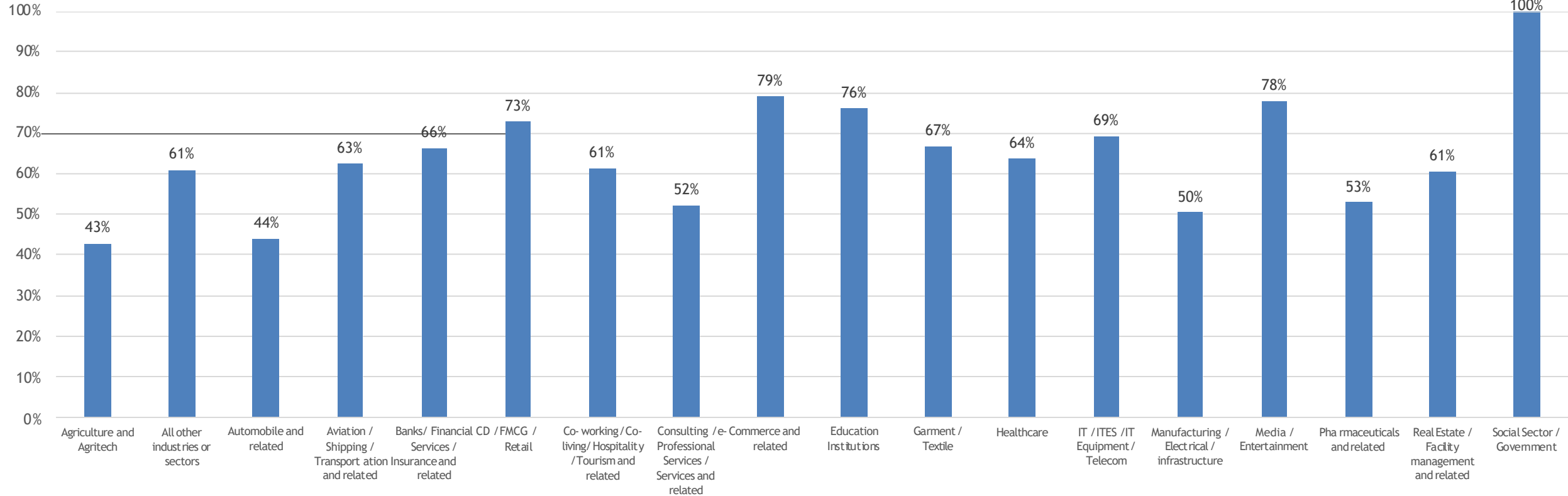
Percentage represents participants agreeing to question



The CD and real estate seem to be maximum in agreement to cut salaries and media doesn't seem to be in agreement to this. More or less all industries are tilting towards not wanting to do salary cuts.

Give average 8-10 % salary increment

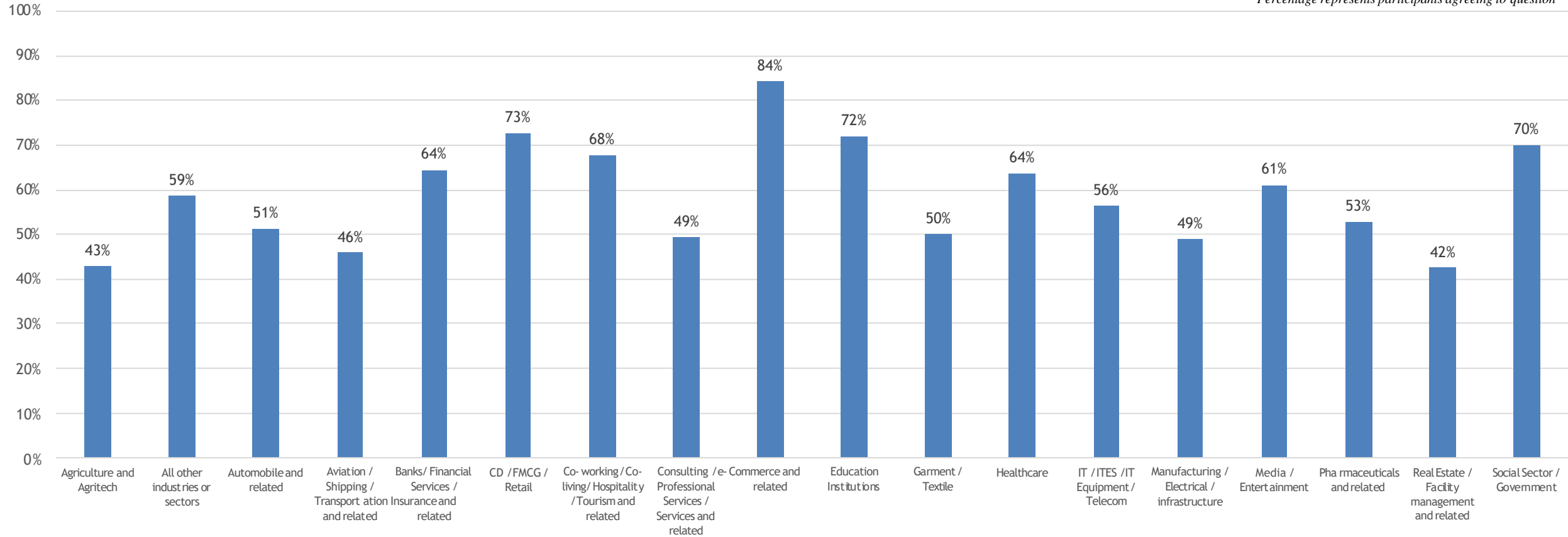
Percentage represents participants agreeing to question



With the general sentiment being that salary increments should be given, the outlier is definitely the social and government sector which feel that increment should be there, and the least in agreement being agriculture and automobile sectors.

Give 10-15% Bonus

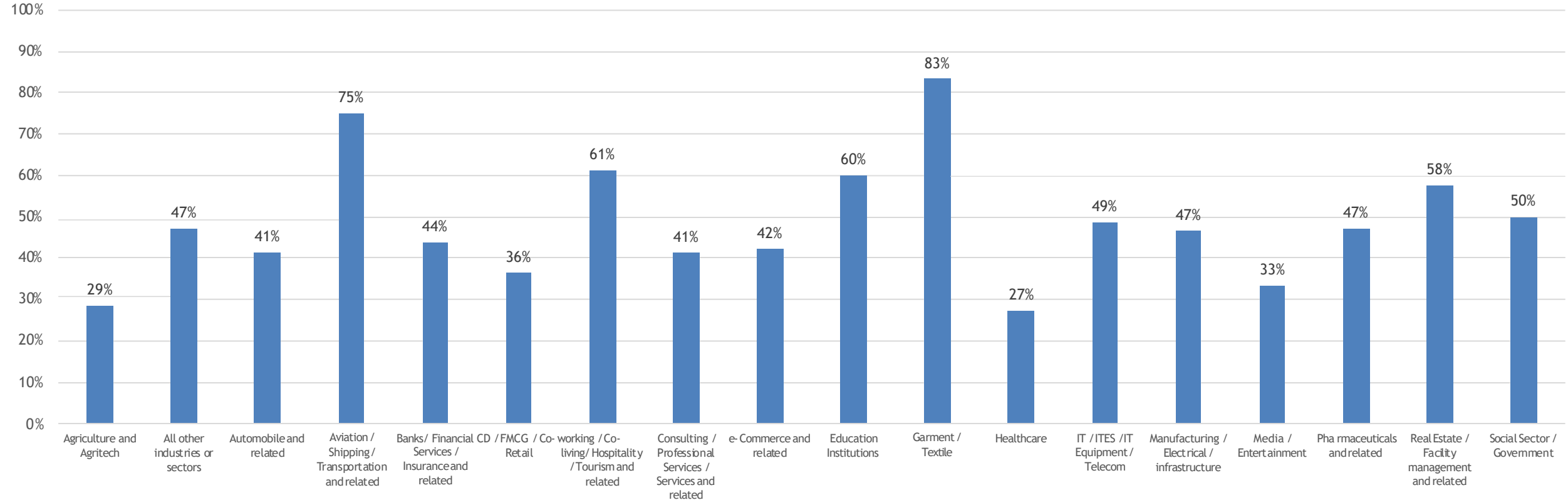
Percentage represents participants agreeing to question



The sentiment in relation to bonus also is that it should be paid, the e-commerce being the highest in agreement, with real estate and agritech being least in agreement to paying bonus.

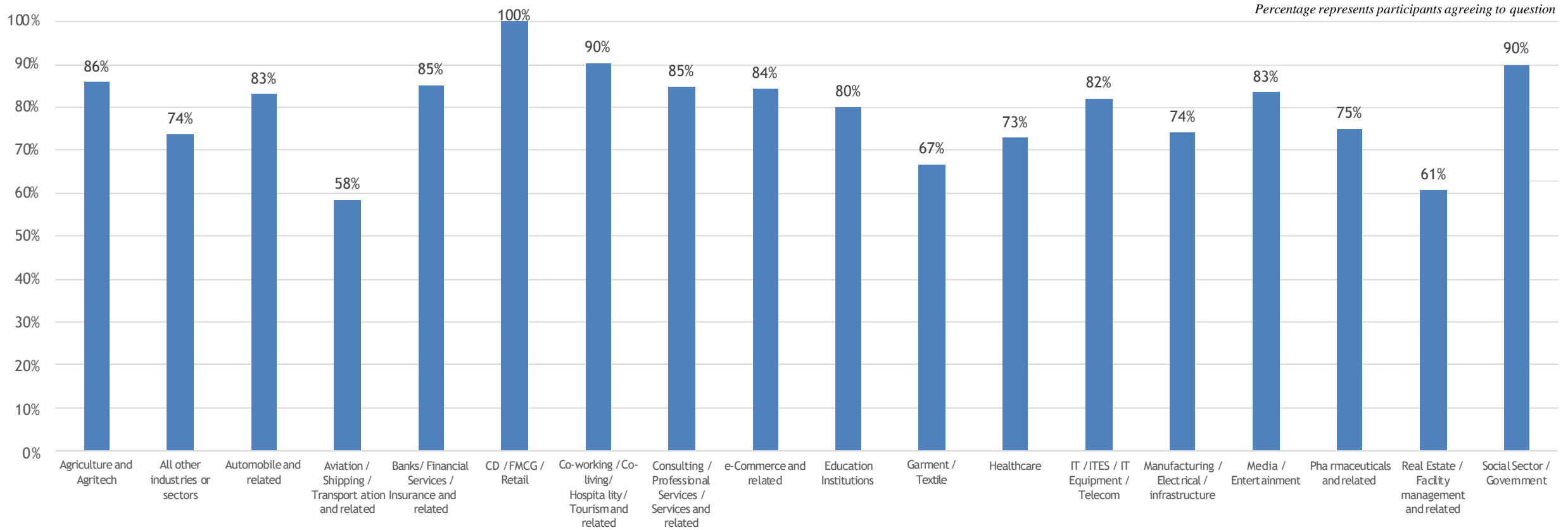
Retrench Employees

Percentage represents participants agreeing to question



This is one parameter which has diverse views, with Aviation, hospitality, garment and education showing agreement to retrench employees, healthcare, media and agritech are least in agreement. Surprising entry is of education wanting to retrench employees.

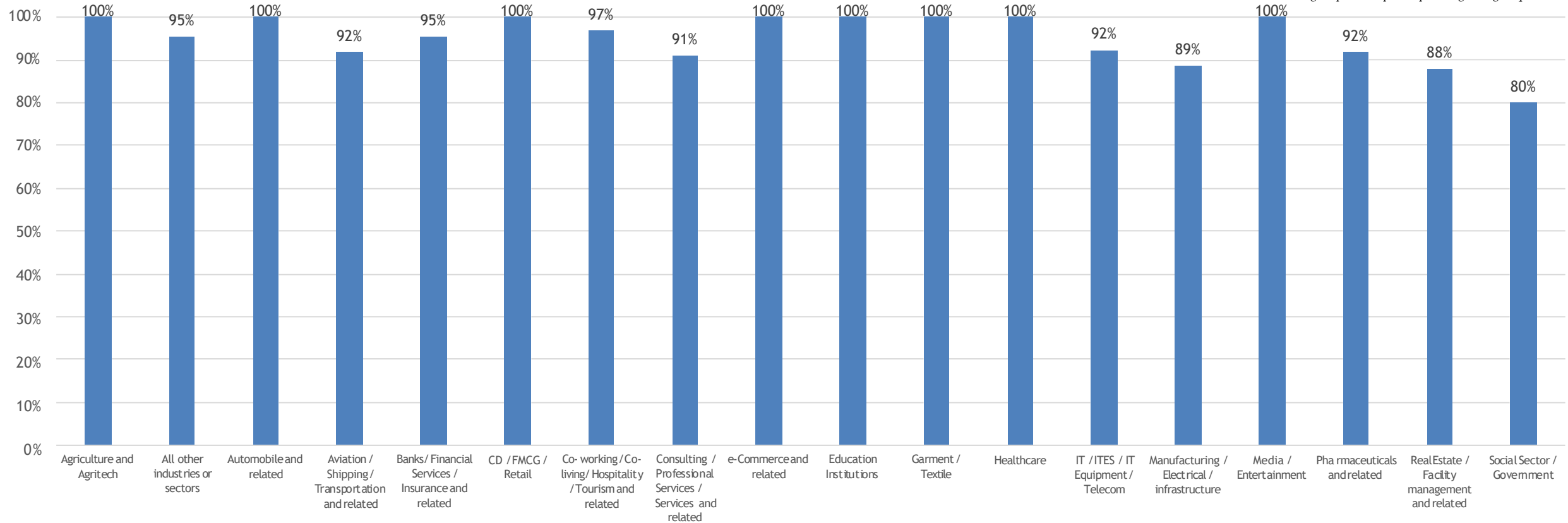
Work From Home to Be Standard



General sentiment is to make work from home a standard practice, given the nature of work, some industries have shown less agreement compared to others, but broadly speaking, this is a new norm that organizations will have to adapt to.

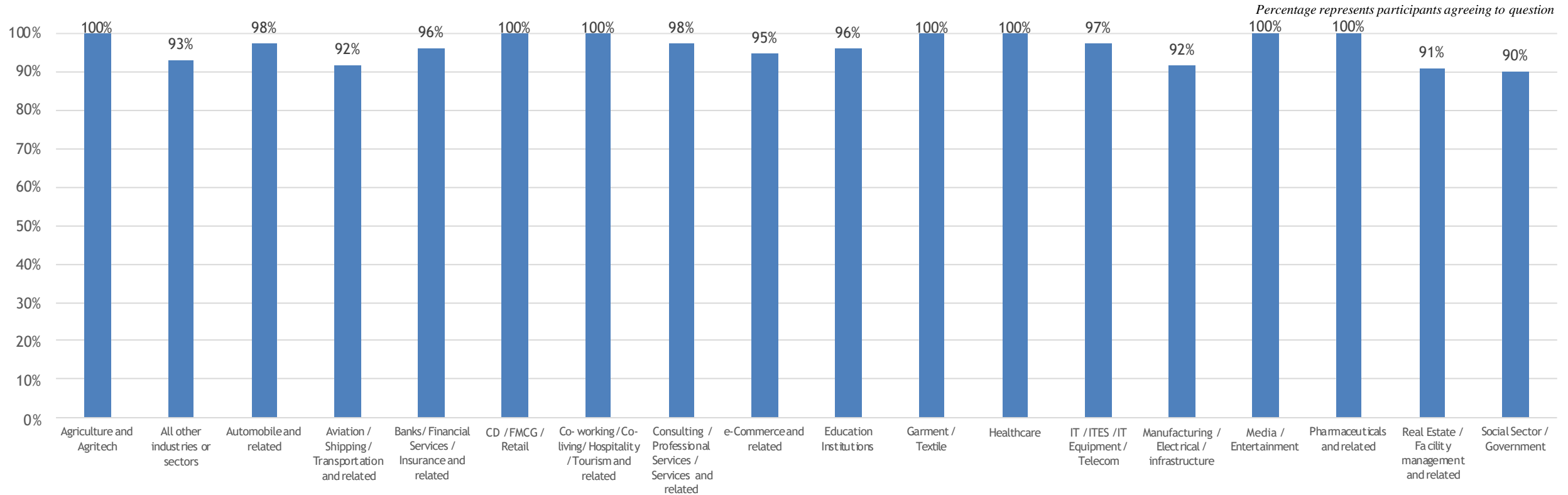
Health Check-Up Mandatory

Percentage represents participants agreeing to question



Health is a focus for all, this is a new standard that every employer must enforce, it may also be introduced by legislation, but for now, it is an expectation from employees across all industries.

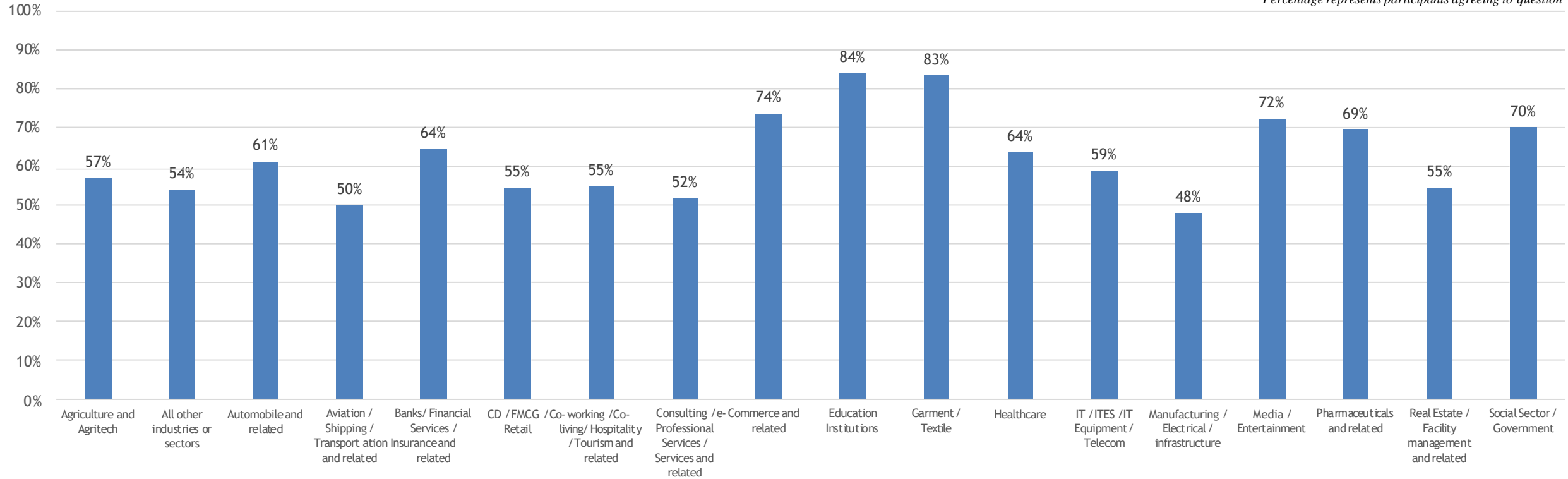
Improve Work Infrastructure & Hygiene



This is an expense and focus that employers will need to quickly pay heed to, all industries are seeing a demand from employees to provide them better infrastructure from a hygiene and cleanliness stand-point.

This Will Not Impact My Company's Ability to Take Care of My Career

Percentage represents participants agreeing to question



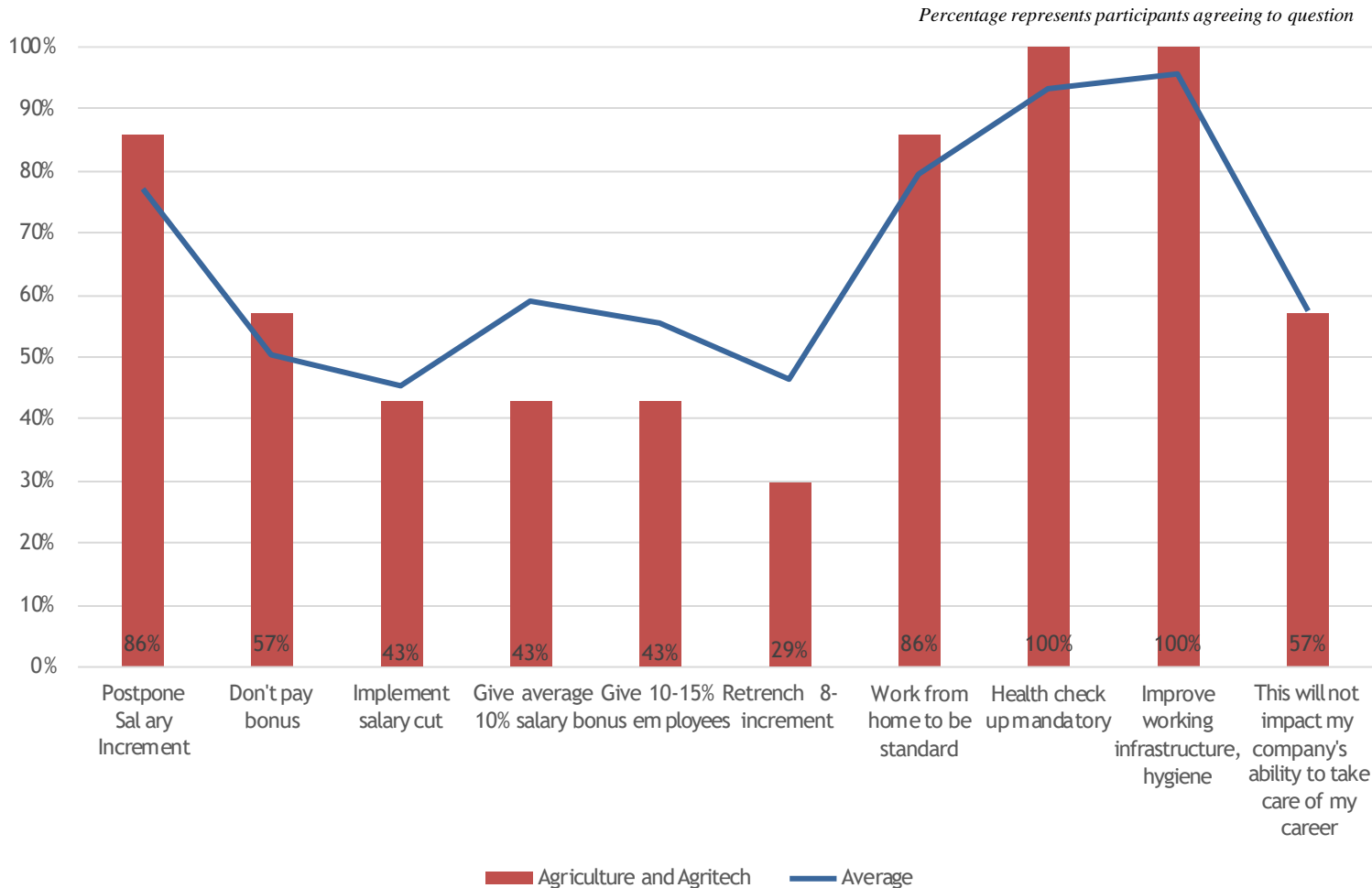
Education, garment, media and e-commerce employees feel that their organization will protect their careers, whereas the employees in manufacturing, infrastructure are of the least belief that their career will be protected by their organization.

4

Industry wise
perception compared
to average

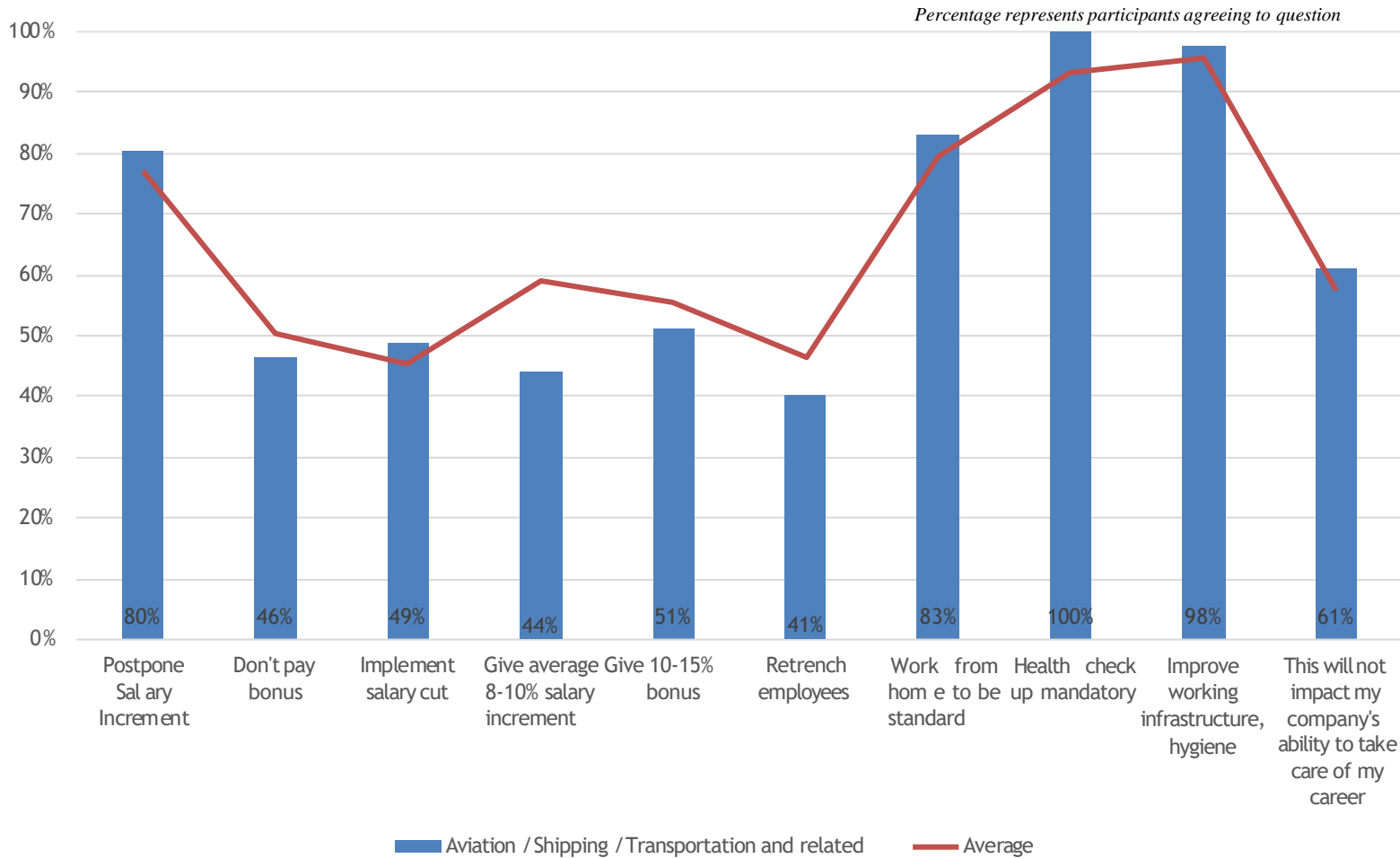


Agriculture and Agritech



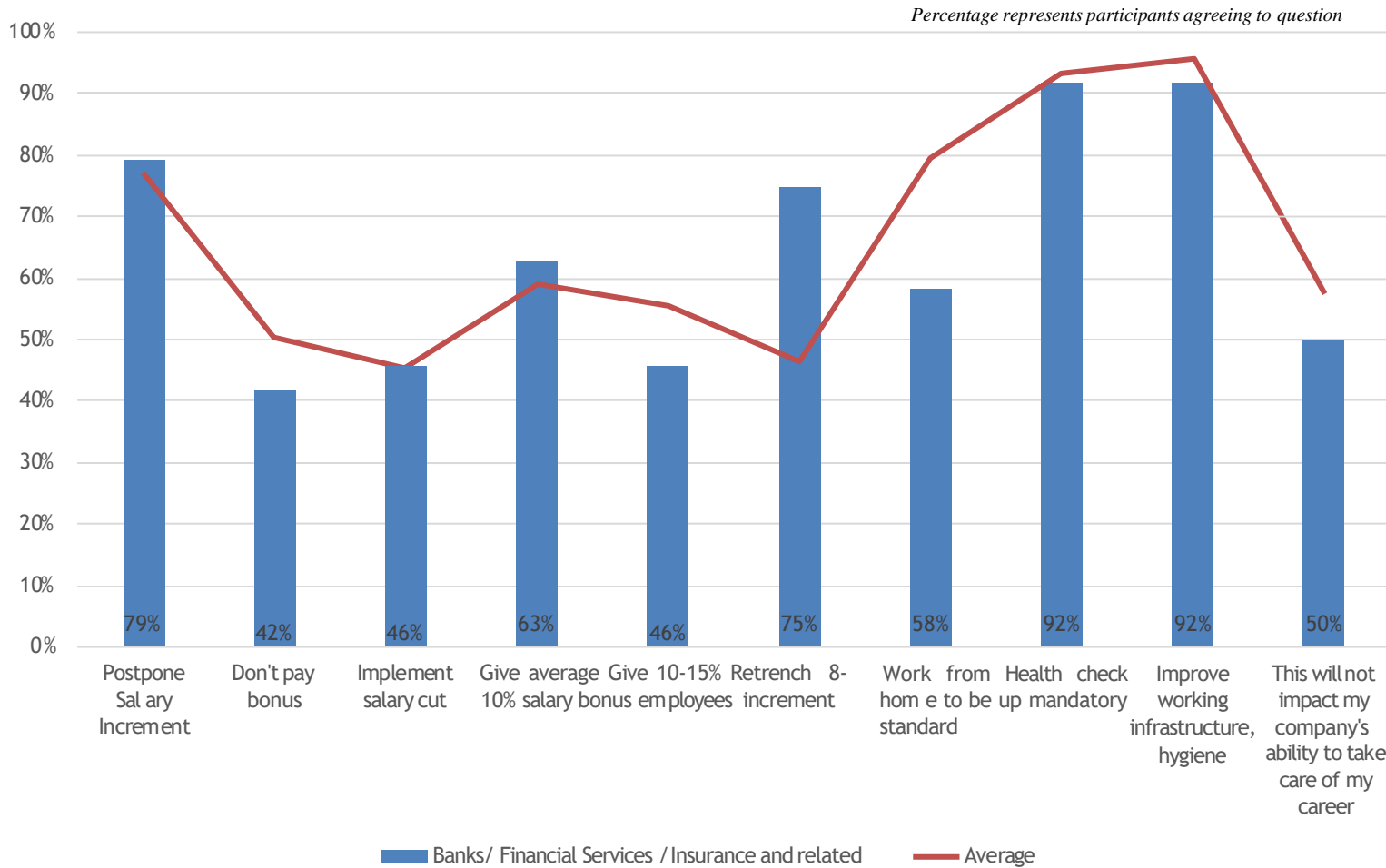
The agritech sector is less in agreement to either retrenching employees or giving salary hike and giving bonus. They however are higher than average for health and improving working infrastructure.

Automobile and related



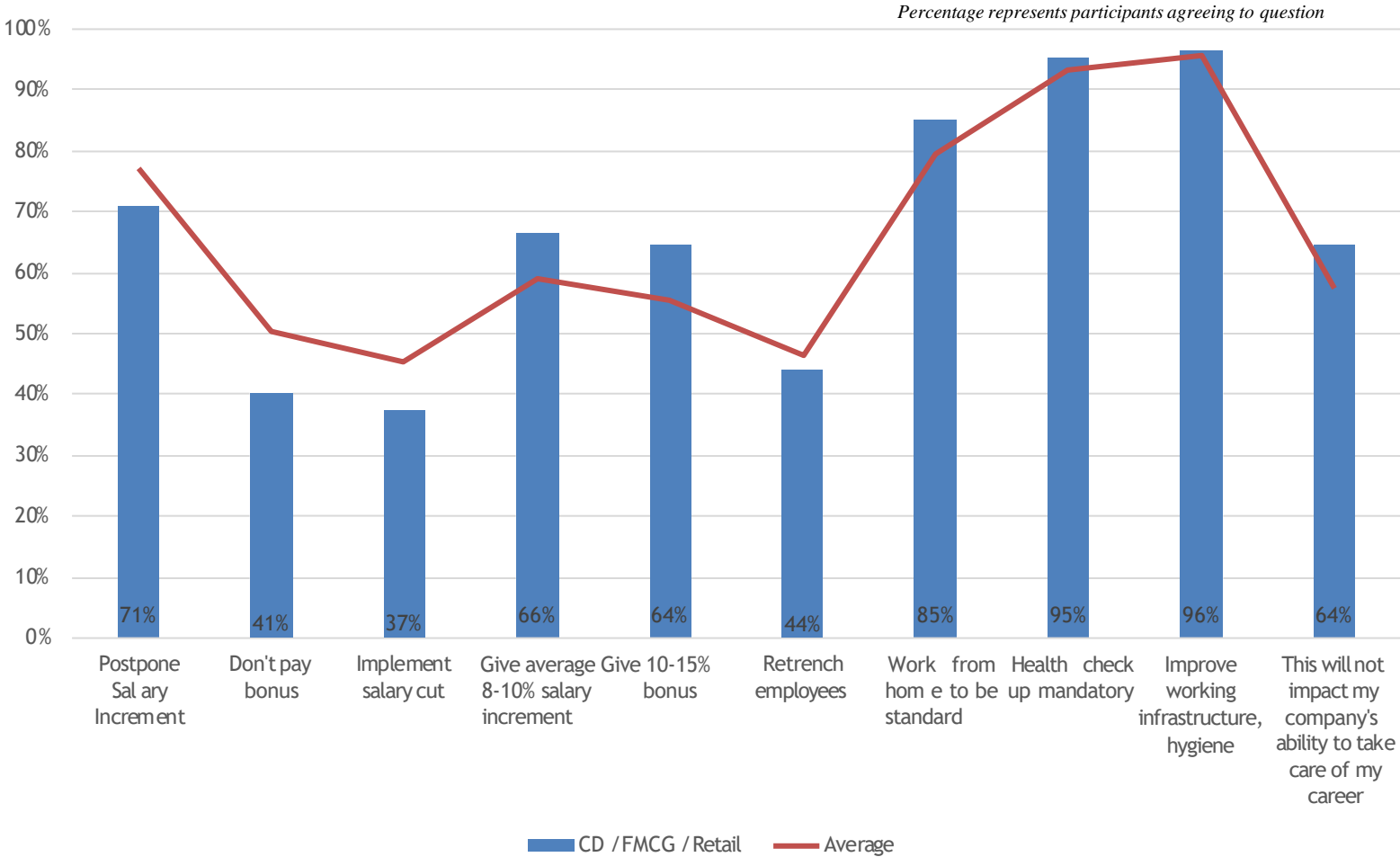
Automobile is more or less on the same thought process as all industries, except that they are in great variance to giving salary increments compared to other industries. They are less than all employees average in agreeing that retrenching employees is a way to be exercised

Aviation / Shipping / Transportation and related



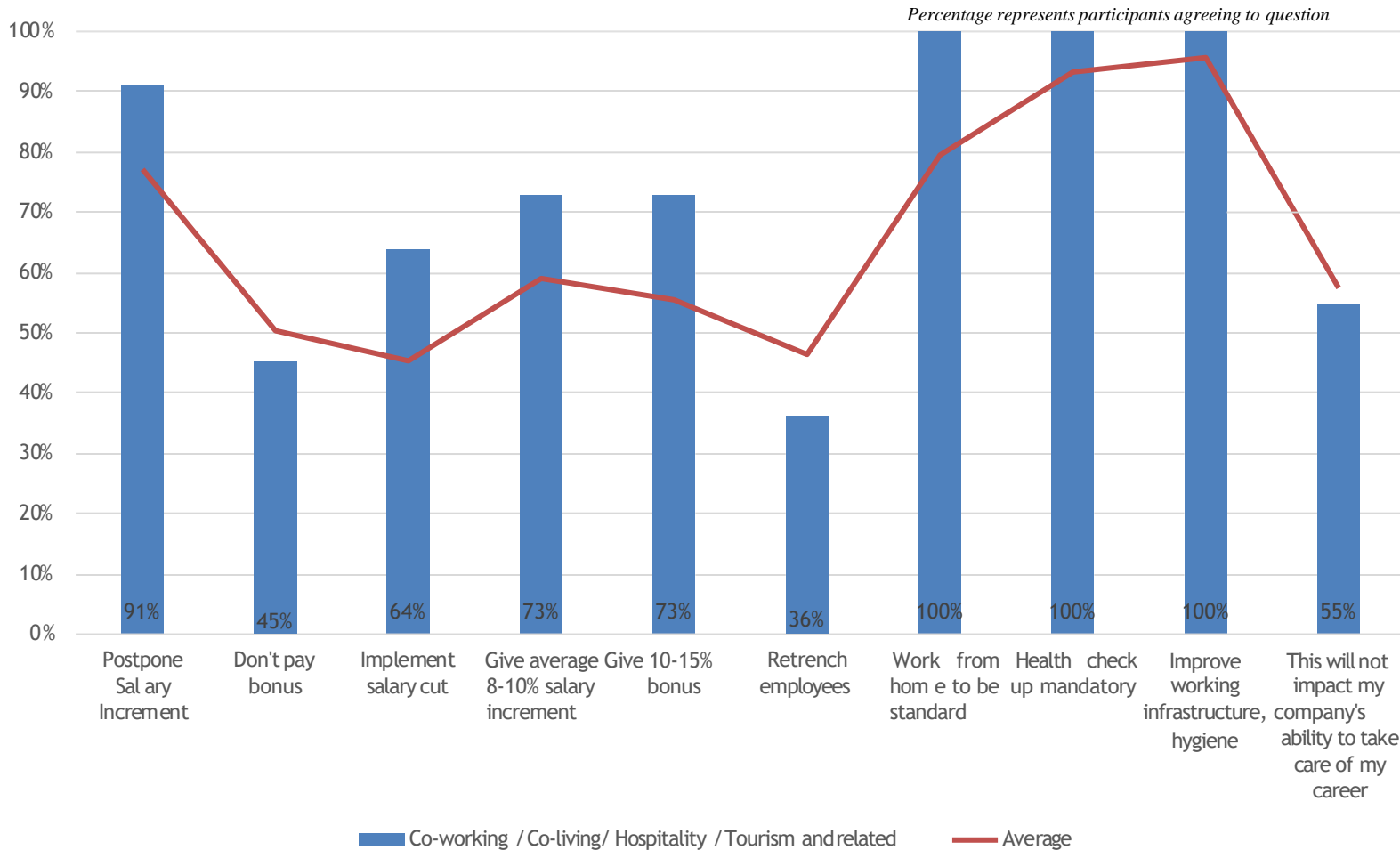
This sector has an interesting response, while they are less than average for cancelling bonus, but they are way above the average in agreeing that retrenchment is inevitable, also they are not so much in agreement as everyone else is when standardization of work from home is discussed.

Banks/ Financial Services / Insurance and related



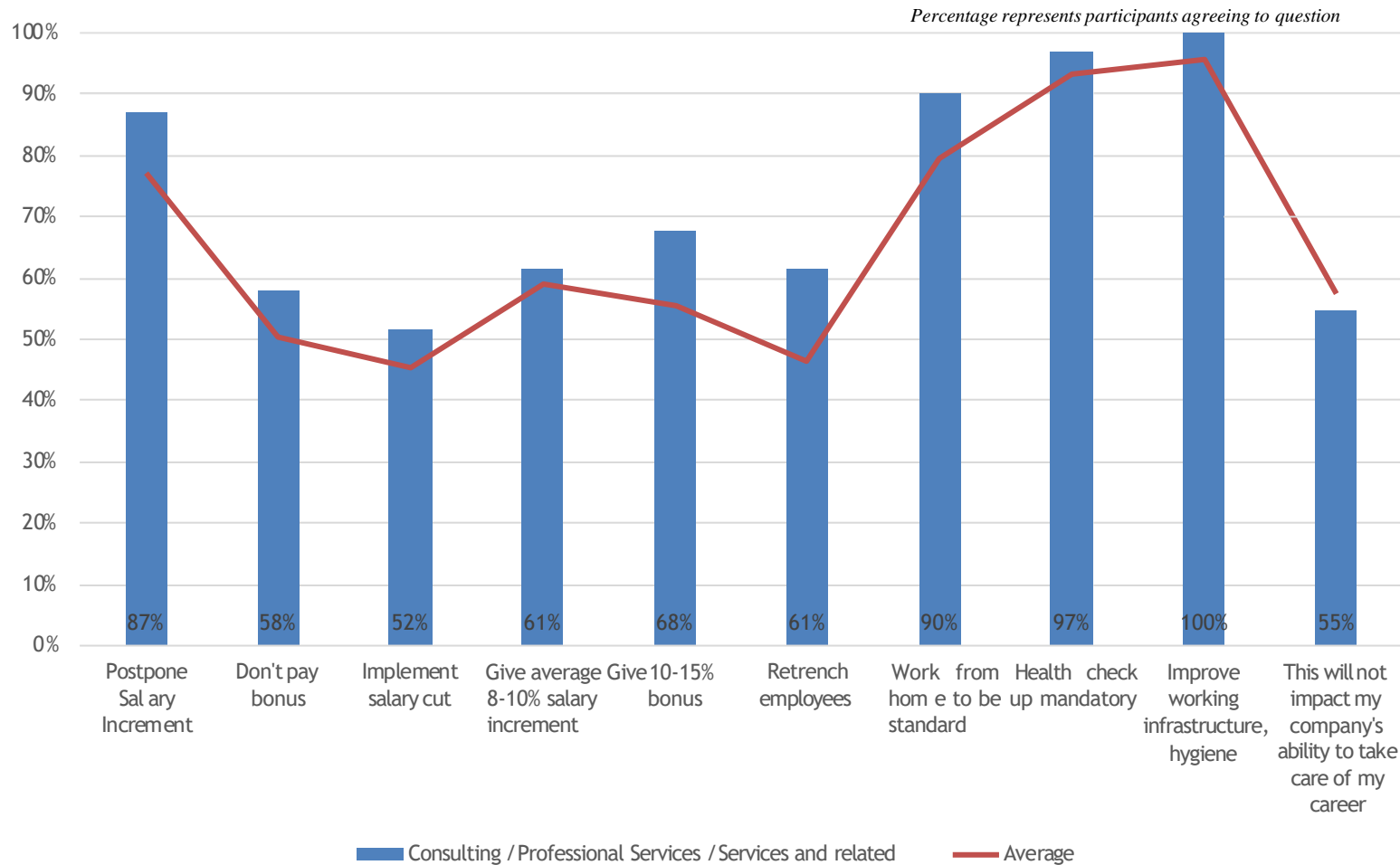
This industry is more optimistic about the outcome and are more keen on getting salary increments and bonuses compared to average.

Consumer Durables / FMCG / Retail



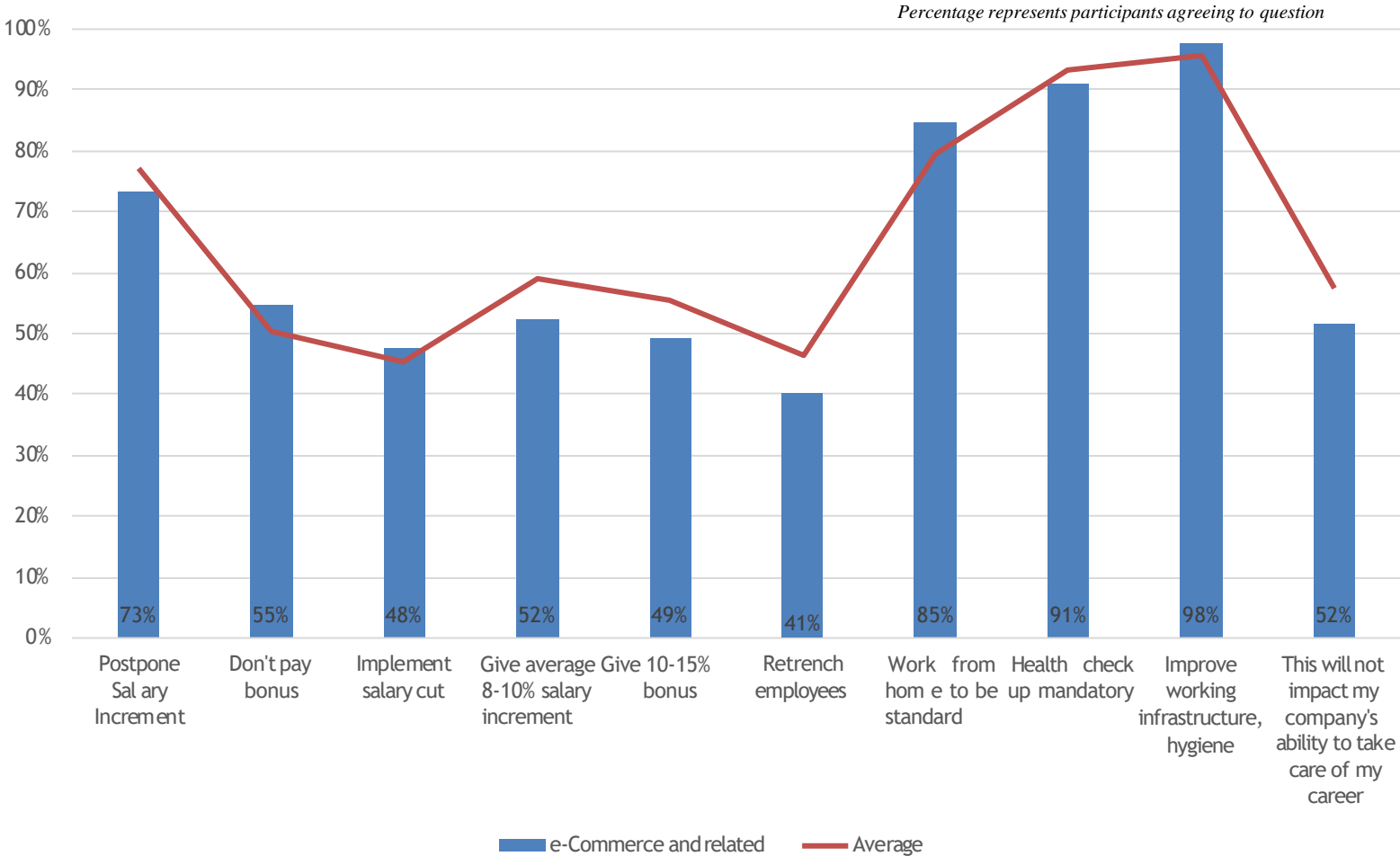
Probably one of the most impacted sectors, employees are willing to take salary cuts and cancel bonus than face retrenchment. There is, however, an optimism also when they seek to continue getting salary increment (for those not terminated or facing salary cuts) and to get bonus.

Co-working / Co-living/ Hospitality / Tourism and related



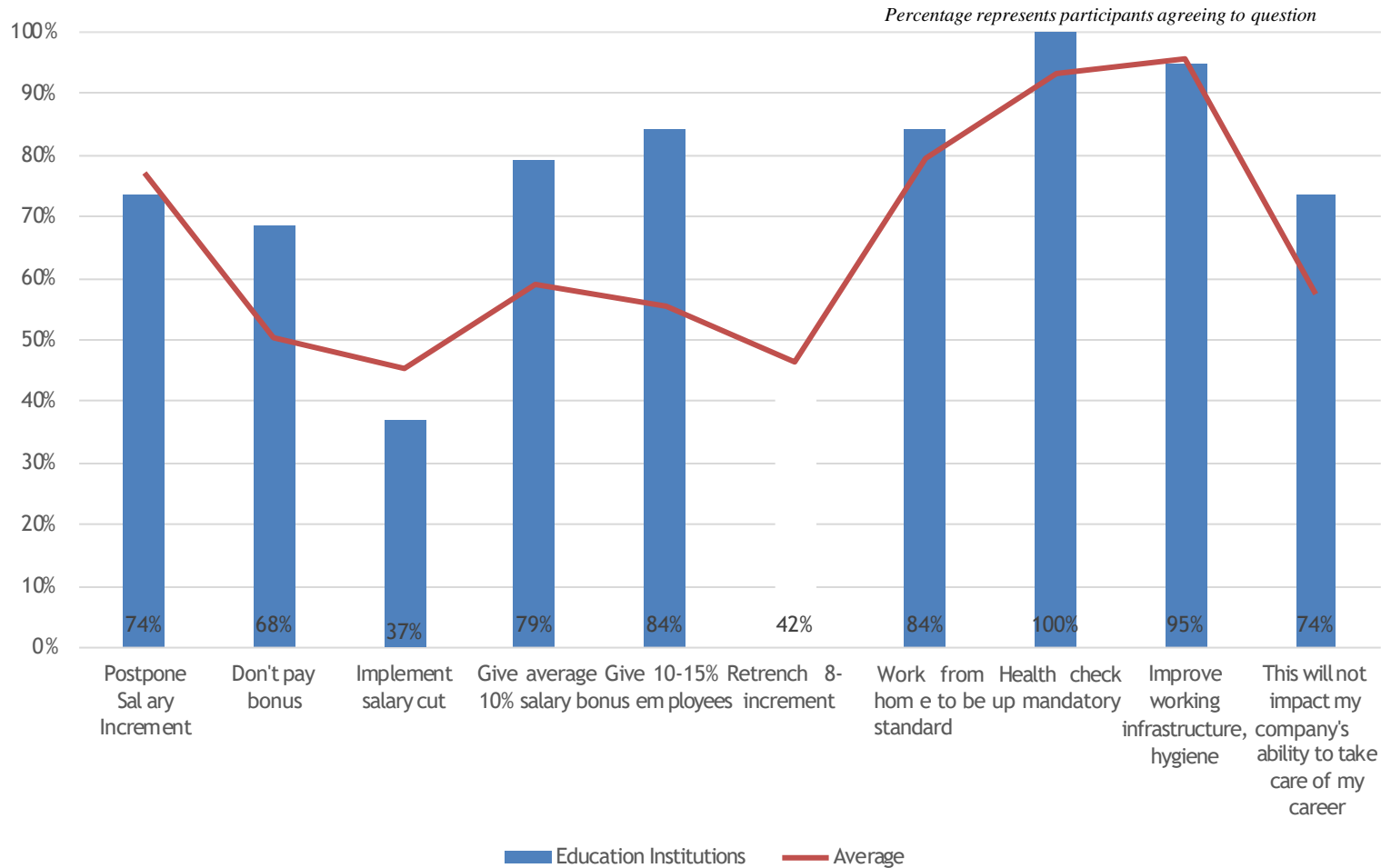
This sector is more or less moving on similar trend like all other groups, except that it has an above average agreement on retrenching employees and maybe that is why to pay bonuses also to employees.

Consulting / Professional Services / Services and related



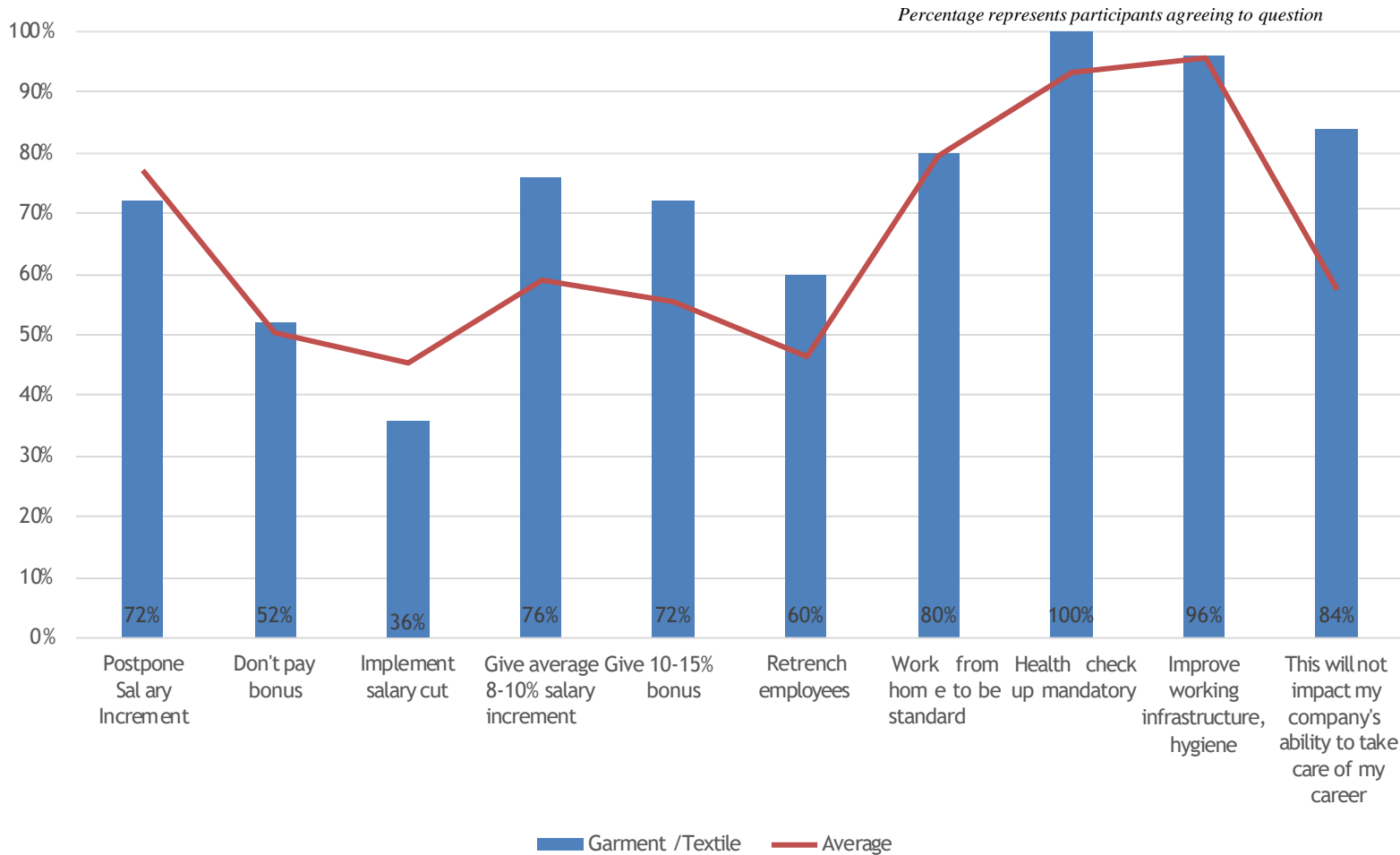
This is more or less on the same trend as the average; however, they are less in agreement that retrenchment should be done than the average and also they are less in agreement to the point that the organization can protect their careers.

e-Commerce and related



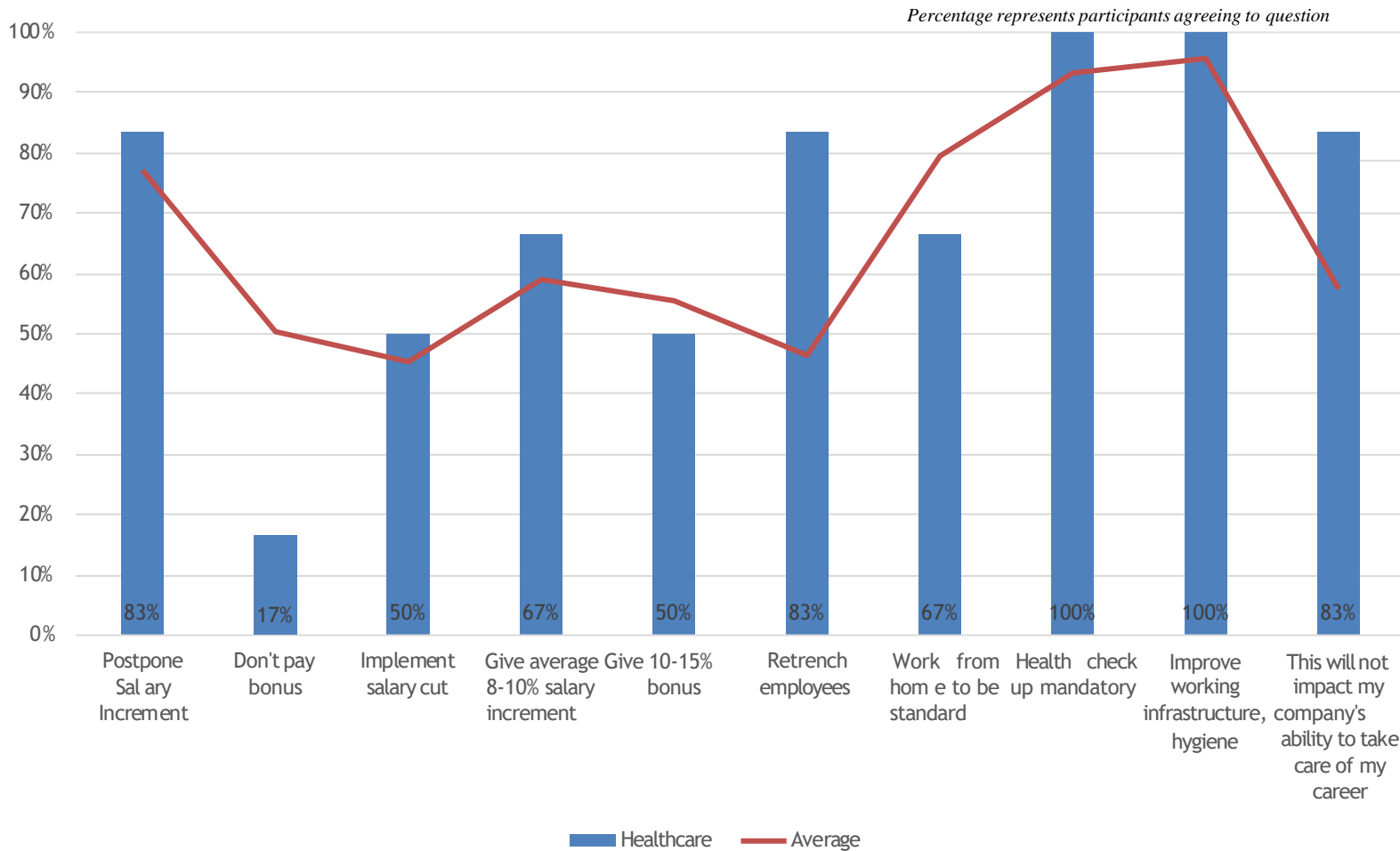
E-commerce sector sees a very interesting response to the current scenario, the number of responses wanting to cancel the bonus is similar to if not greater to those wanting a bonus payout, clearly defining a large population which is fence sitters and both points are way above average compared to other sectors. Retrenchment and salary cut are something that they don't seem to agree and are below the average. Infact, salary increment is also something that the group sees as very different form that of the average

Education Institutions



The education sector has a lot of difference between the average and their views on how they feel about the organization containing the negative impact to their career, it is also not so much in favor of taking salary cuts, but is more in favor of retrenchment along with salary increment and bonus for those who are staying behind.

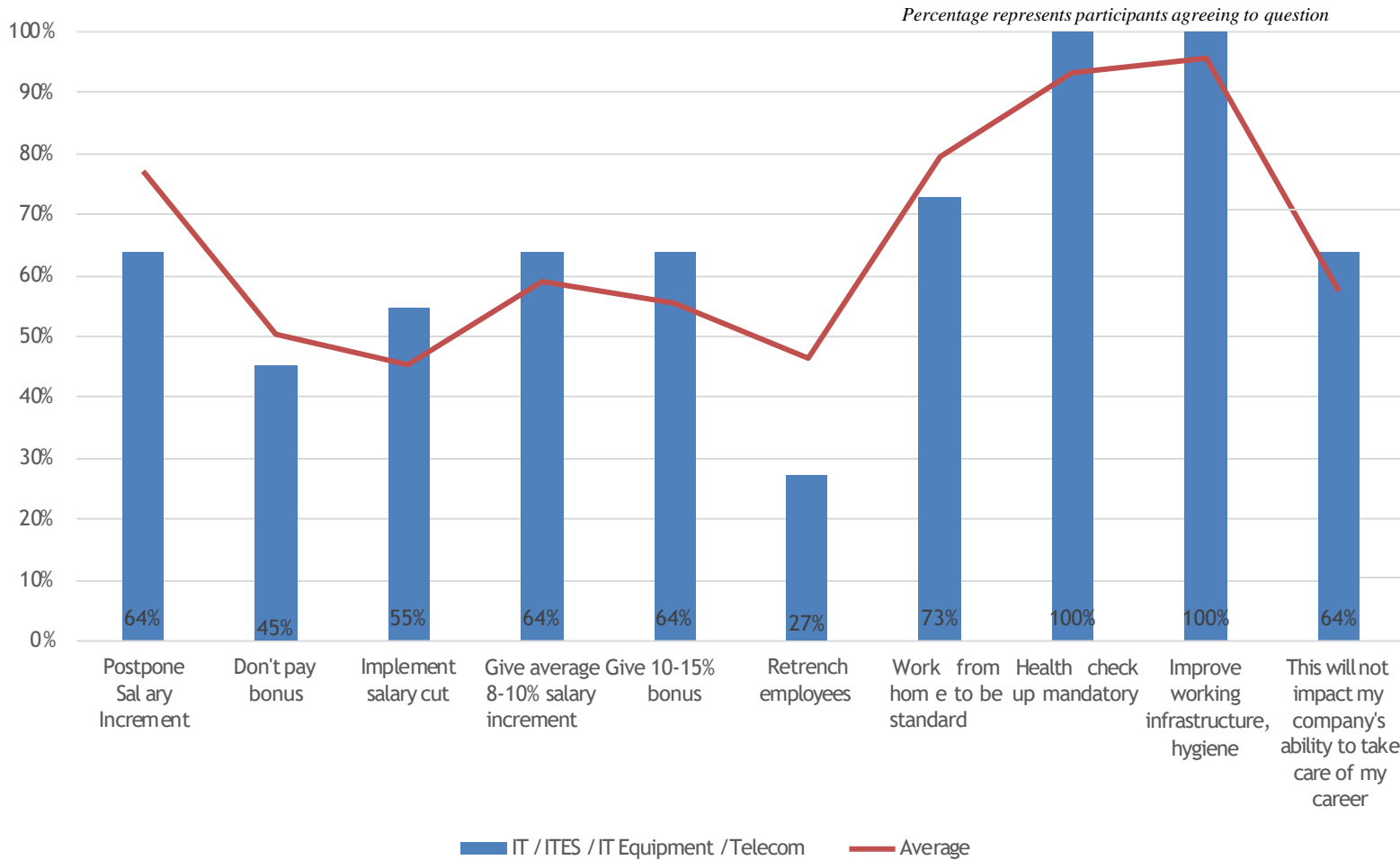
Garment / Textile



Garment, being one of the most export oriented sectors, have one of the lowest agreement to cancelling of bonus, but also one of the highest agreements to retrench employees when compared to other industries average.

They also believe that their organizations will protect their careers, a positive difference when compared to the average of other industries.

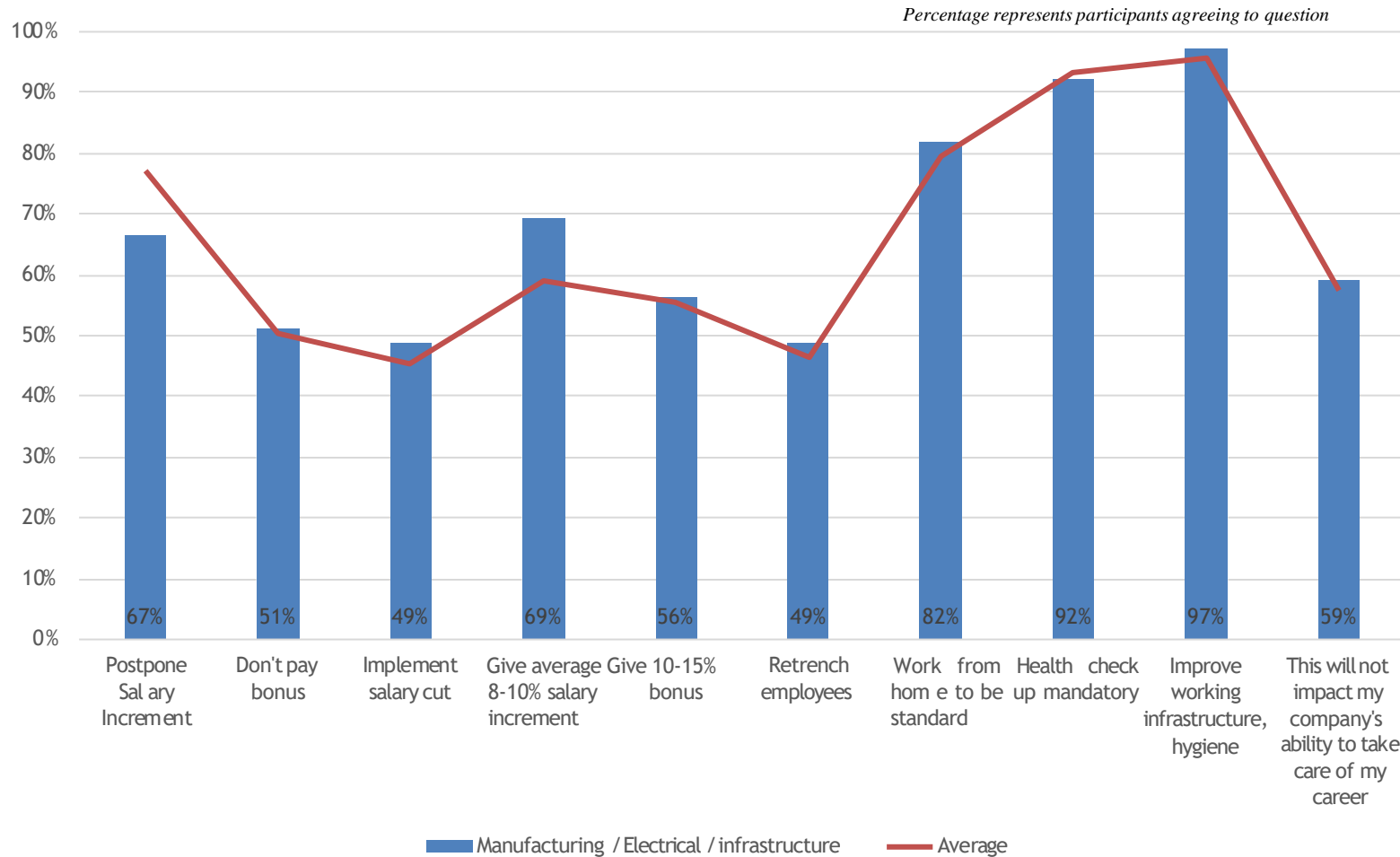
Healthcare



The healthcare industry is not in agreement to retrenching employees, not only is this way below the average, but is also one of the lowest. They are however in agreement to salary cuts and to postponement of the salary when compared to industry average.

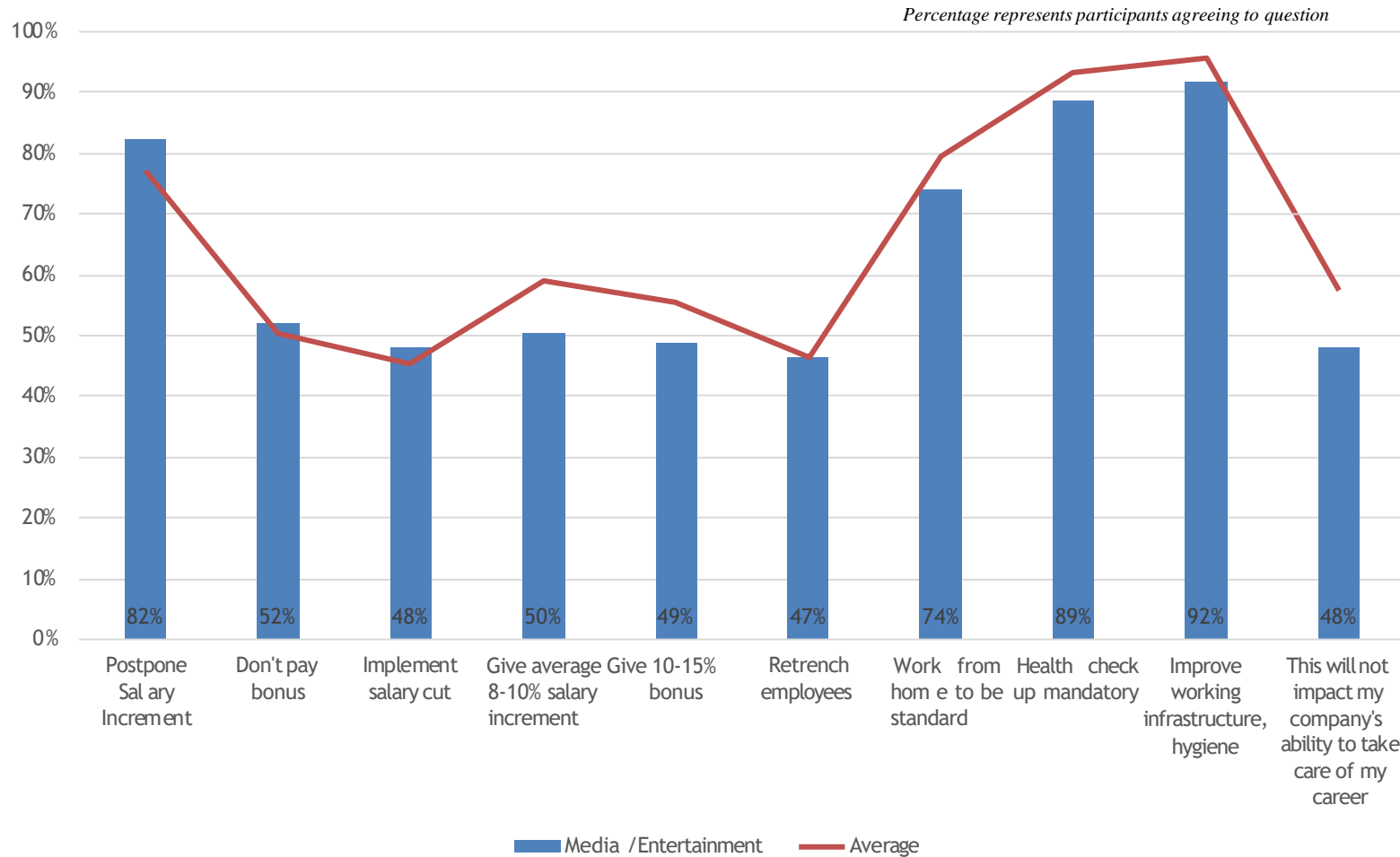
The interesting fact is that 100% participants from these sectors felt that health check-up and upgrading existing infrastructure for better hygiene was essential.

IT / ITES / IT Equipment / Telecom



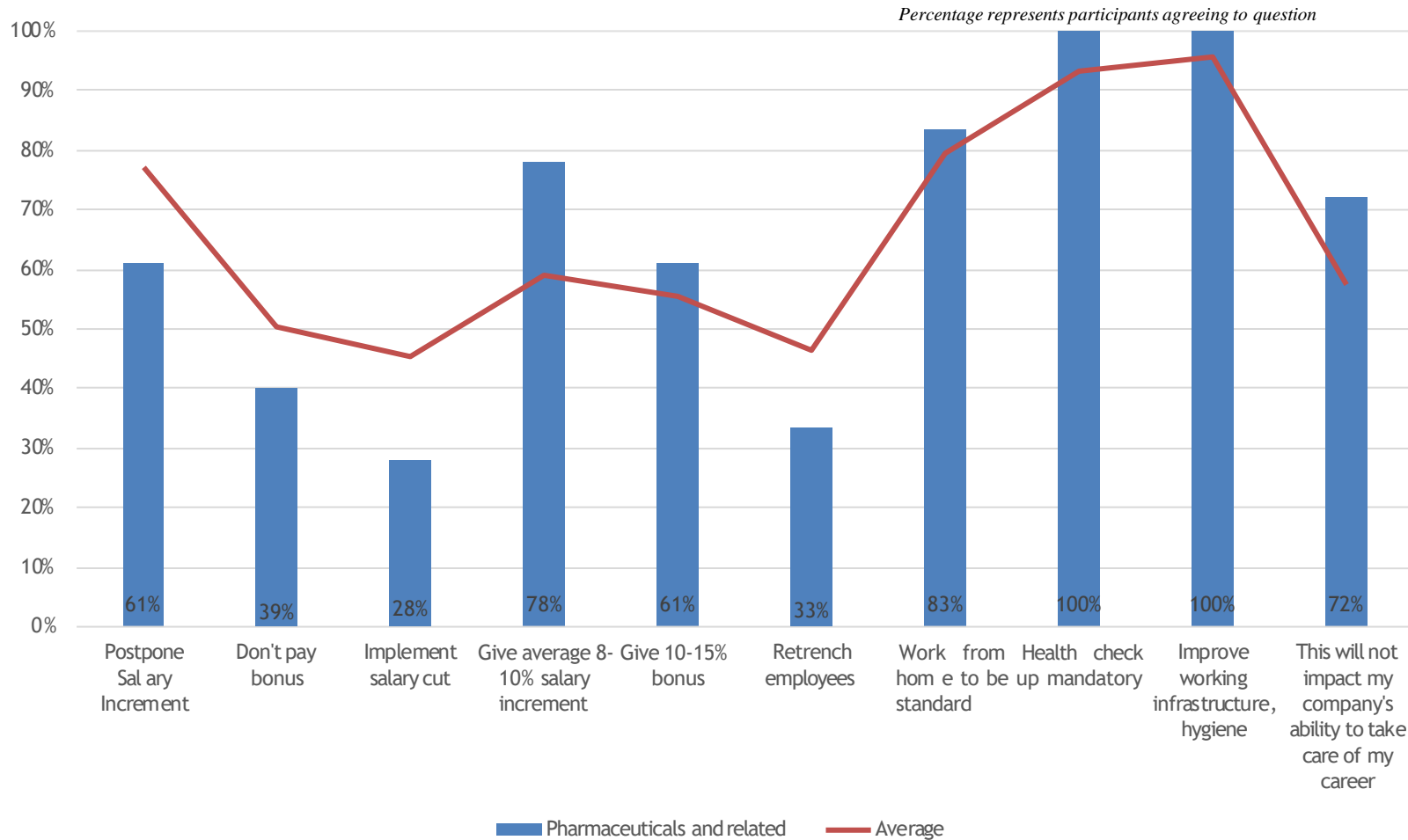
This sector follows the average trend almost exactly except for the point of postponing of salaries, as there is lesser agreement to postpone salaries when compared to average of all industries. Similarly on receiving bonus, they have a higher agreement compared to industry average.

Manufacturing / Electrical / Infrastructure



Manufacturing is also more or less following the trend as average for all industries, except, they are not as much of the view that their organization will protect their careers when compared to average of all industries.

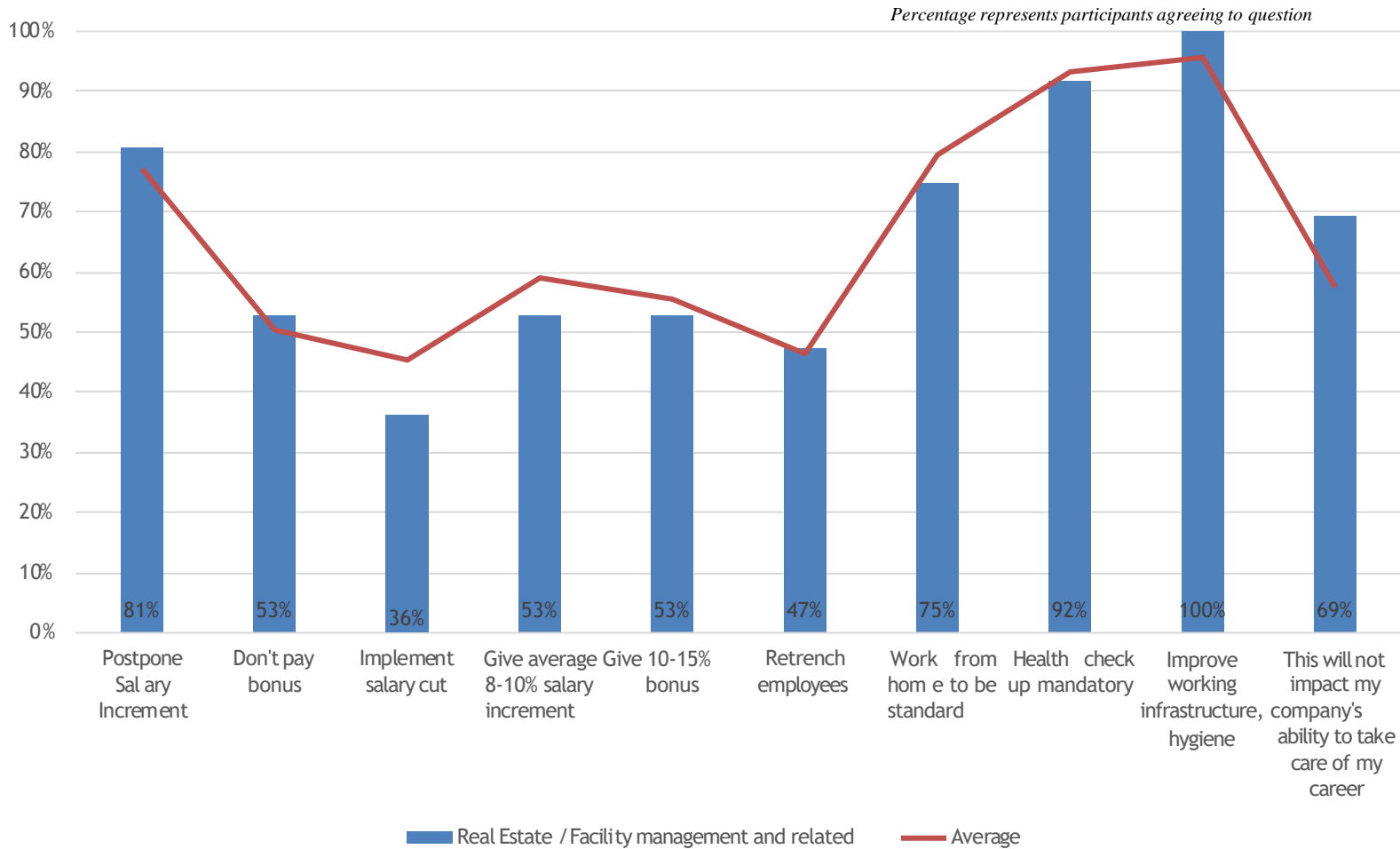
Media / Entertainment



The industry on which we have a lot of hopes, compared to the average industry this sector does not feel as much for cancelling bonus or implementing salary cuts, they infact don't even feel as much for retrenching employees and instead feel that salary hike should be given.

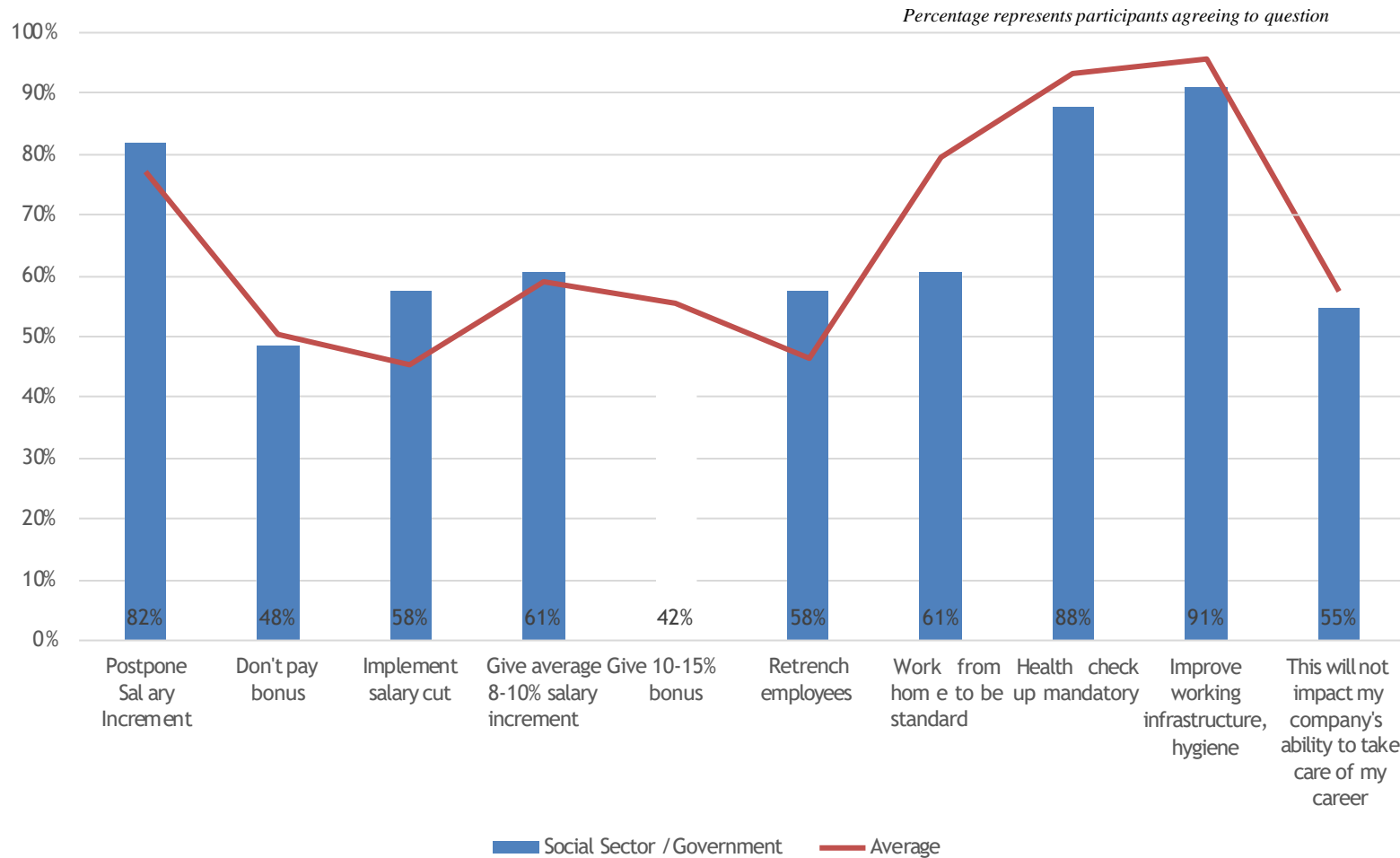
That apart, this is the second sector which is asking for a 100% on making health check-ups mandatory and in stating that the present infrastructure require upgrade from a hygiene standpoint.

Pharmaceuticals and related



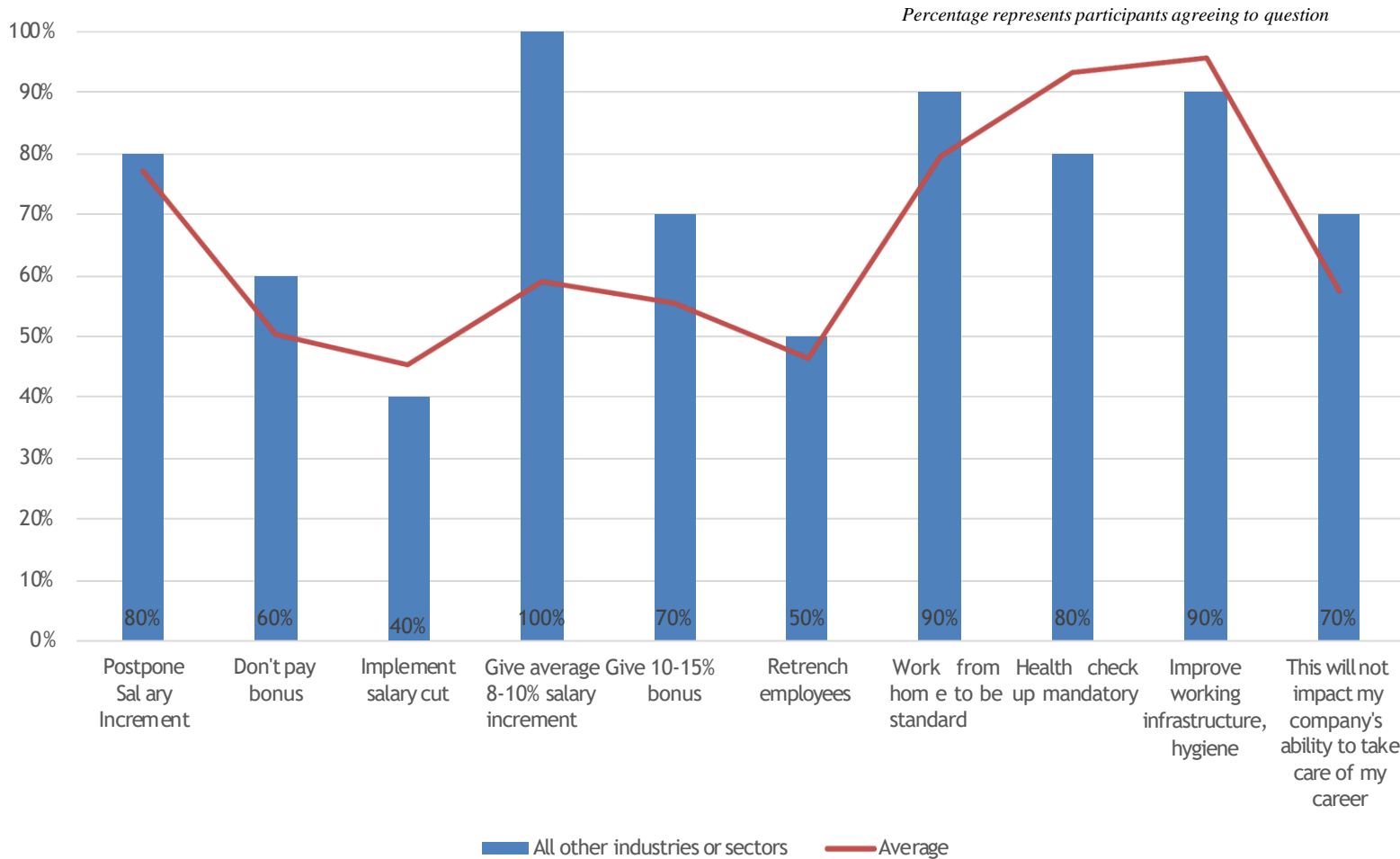
The sector is almost on the same lines as the the average of all industries, except for implementing salary cuts, where they too are not in agreement and are below the all industry average

Real estate / Facility Management and related



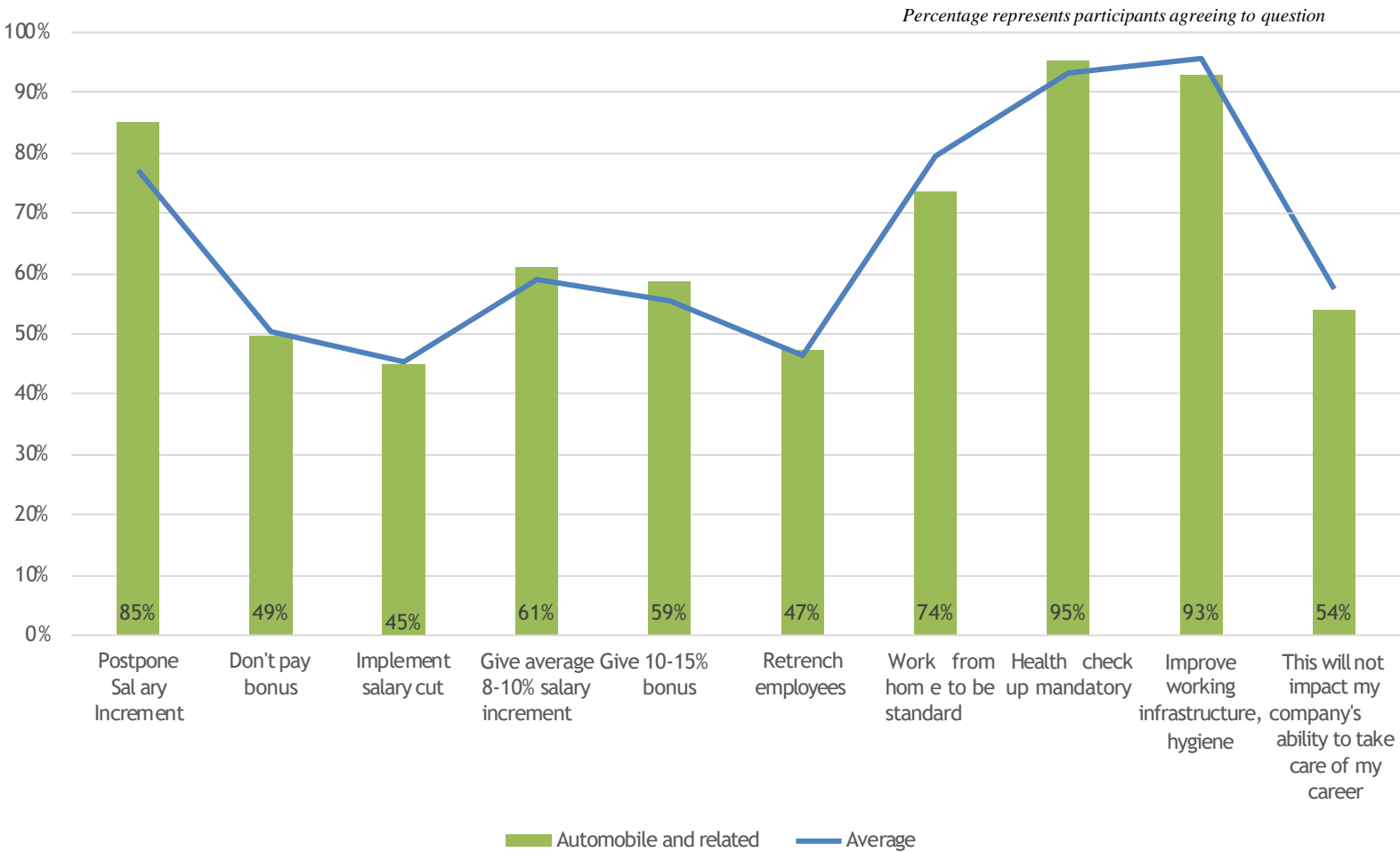
The sector has very clearly said that salary cut should be there, which is above all industry average and taking a bonus is lesser than industry average. Rest all are standard and more or less similar to all industry average.

Social Sector / Government



This is a grouping which has somewhat different aspect to what average of all industries present, 100% of participants have said that the salary increment should be there, not only it is different than the all industry average, but it is 100%. When it came to bonus there seem to be a overlap, with a good percentage being fence sitters who are ok to get or not get a bonus. Rest is all similar to the all industry average trend.

All other industries or sectors



This is a grouping of industries which we did not break into smaller groups, this random collection of industries may not give any actionable perception, but just still gives a views on how rest of the industries are perceiving the scenario as of now compared to the stated industries average.

5

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