# COQUAL

## Challenging Norms:
## A Global Analysis of Gender at Work

# A brief guide to terminology

Please refer to the report for full-length definitions of each term.

## Sex

**Sex** categorizes people according to biological characteristics, such as anatomy, hormones, and chromosomes. At birth, most babies are assigned as either male or female, but there are many biological sex variations within the human species.

## Gender

**Gender** refers to a socially constructed set of norms associated with being a girl, boy, woman, man, or something else. Gender norms vary by society and can shift over time.

**Gender binary** is a term we are using to refer to the global tendency to think of gender as two distinct, fixed, and opposing categories: male, men, and masculinity; and female, women, and femininity.

**Gender identity** is an individual's deeply felt experience of gender. Gender identity categories can be binary (e.g., man, woman), nonbinary (e.g., genderqueer, genderfluid), and ungendered (e.g., agender, genderless).[2] A person's gender identity can change over time.

**Transgender** is an adjective that describes individuals whose gender identities or expressions differ from the sexes they were assigned at birth.

**Gender expression** describes the way a person presents their gender identity to the world through behavior, style of dress, name, personal pronouns, and beyond.

## Sexual orientation

**Sexual orientation** refers to emotional, romantic, or sexual feelings toward other people or no people.[1]

**LGB+** refers to those who identify as lesbian, gay, or bisexual, plus other sexual orientations that are not heterosexual (including pansexual, demisexual, etc.).

**Cisgender** is an adjective that describes a person whose gender identity aligns with the sex they were assigned at birth.

**Gender diverse** is a term used to describe a wide range of gender identities and expressions that may not follow the gender binary framework or do not conform to traditional norms and stereotypes.

**"Gender norms are everywhere. They are in our environment. They are around us. They are in us. We can each choose to sustain or deconstruct gender norms in our day-to-day life."**

— Robin Ladwig, PhD, Associate Lecturer, Canberra Business School (CBS) at the University of Canberra (UC), Australia

# Introduction

In the nearly two decades since Coqual began conducting research on gender inequities in the workplace, our numerous reports have charted how challenging it is for women to find equal footing. While some things have certainly changed for the better, data in this report helps make sense of the persistent patterns of inequity that are still present all across the world. We critically explore the gender workplace climate in Australia, Brazil, Germany, India, Japan, South Africa, the United Kingdom, and the United States—countries that share a common thread of gender inequity, but differ in their contextual nuances.

We found improvements in some areas: women have increased their presence in the workforce in many of the countries in our report,[3] and in our qualitative interviews, we heard from men who questioned the primary breadwinner model. We also find that understandings of gender are evolving across generations, moving beyond the traditional gender binary to something more inclusive of all gender identities.

But there are also discouraging signs that show a lack of progress. Women remain underrepresented in management and leadership.[4] Furthermore, work towards gender equality has not been equitable even among women. For instance, implementations of diversity, equity, and inclusion (DE&I) efforts in the US have been shown to largely benefit White women.[5]

In this report, Coqual highlights how gender inequity is still embedded within corporate processes, policies, and cultures across the globe. We have identified three primary themes across all eight markets: (1) gender and career advancement; (2) gender and the social environment; and (3) gender and caregiving.

We then invite our audience to prepare for the future of the gender conversation by exploring beyond the outdated norms of the gender binary. We challenge the ways in which we define and perform masculinity and femininity within the workplace and highlight how this limits our ability to cultivate truly equitable and inclusive environments.

Finally, we conclude with a series of solutions for DE&I practitioners. Company leaders will learn how they can exceed organizational expectations and lead the way in creating a braver, more gender-inclusive workplace.

While we highlight some key intersections in each country, please refer to the full report for deeper analyses and other intersections on race, ethnicity, sexuality, and transgender and gender diverse (TGD) individuals.

**"Issues of gender identity are becoming huge. In the next five to ten years, there is going to be a wave hitting the corporate world. There is going to be a revolution...and I don't think corporations are prepared."**

— Nancy Rothbard, David Pottruck Professor of Management and Deputy Dean, The Wharton School, University of Pennsylvania, United States

# Australia

In Australia, representation of women in leadership, and the workplace more broadly, continues to be inequitable. In leadership representation, one study finds that only about one in five CEOs are women.[6] Women are also underrepresented (38.4%) in full-time work and overrepresented (68.5%) among part-time employees.[7] We highlight how the unequal division of domestic labor between men and women in Australia is a contributing driver of inequity.

Coqual research finds that women are performing more childcare on average (69%) compared to men (52%), as well as housework (68% vs. 55%). This likely helps explain why only 26% of women we surveyed say they are very satisfied with their work-life balance. We also find that over half of women (54%) say that having children has hurt their career compared to 39% of men, and only a quarter (25%) of women say that having children has helped their career compared to 43% of men.
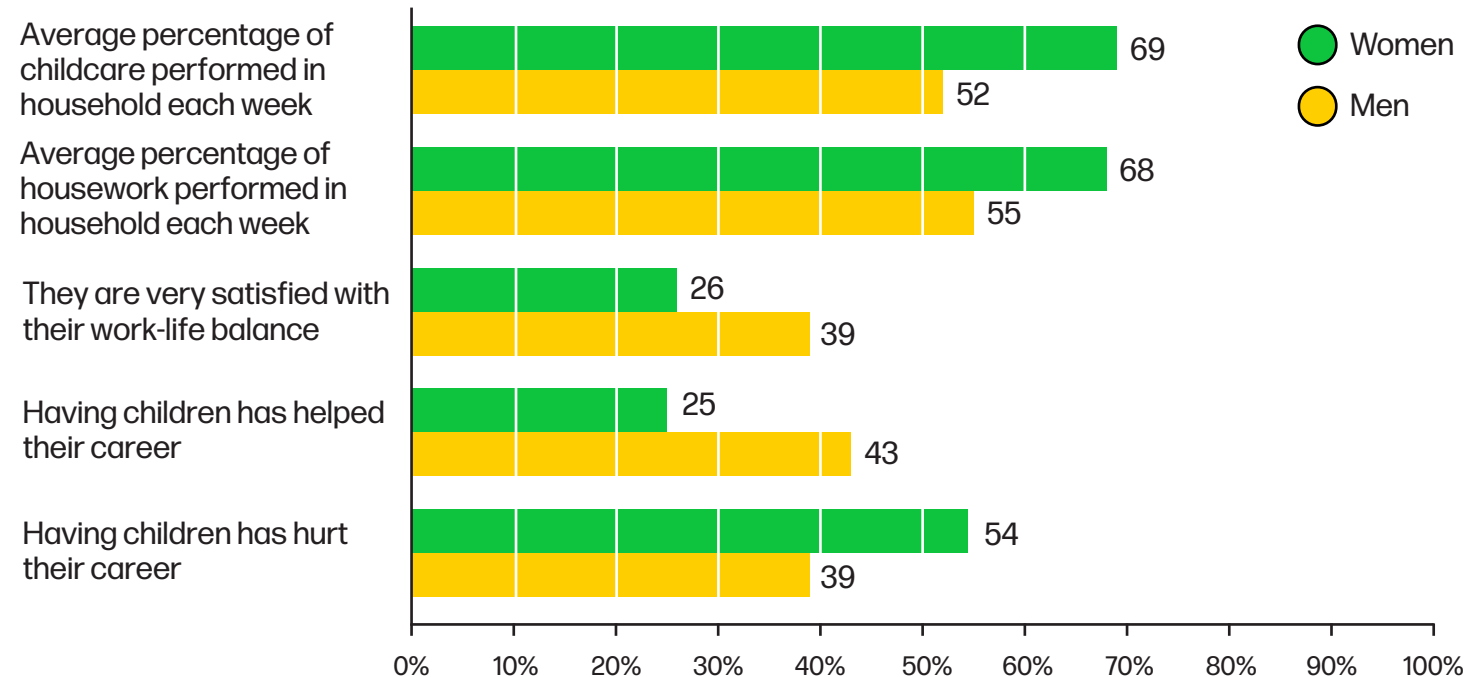
We attribute this to what has been referred to as the "motherhood penalty" and the "fatherhood bonus," which Coqual has explored in previous reports. Mothers, as presumed caregivers, are assumed to be distracted after having children, while fathers, as presumed breadwinners, are perceived as being more committed, "ideal" workers. These stereotypes have a tangible impact.[8] Women have lower earning potential after having children, while men may receive an increase in pay after having children.[9]

Australian Aboriginal and Torres Strait Islander professionals continue to be affected by Australia's history of colonialism. Our sample size was not adequate to analyze statistically significant differences between Indigenous respondents and professionals of other racial and ethnic groups. However, we believe that this speaks to a larger systemic issue of Indigenous underrepresentation in workplace environments.[10]

## Professionals report:

Average percentage of childcare performed in household each week
- Women: 69
- Men: 52

Average percentage of housework performed in household each week
- Women: 68
- Men: 55

They are very satisfied with their work-life balance
- Women: 26
- Men: 39

Having children has helped their career
- Women: 25
- Men: 43

Having children has hurt their career
- Women: 54
- Men: 39

# Brazil

Although women outpace men in secondary and tertiary education, they still earn less, are siloed into part-time work, and are more likely to drop out of the workplace before gaining access to leadership opportunities.[11] The gender wage gap in Brazil—where women earn an average of 24% less than men—persists despite higher education levels.[12]

Coqual data reveals that more than one in four (26%) Brazilian women say having children has hurt their career, while nearly half (48%) of men say that having children has helped their career. We find that women report that they're performing 66% of childcare in their households on average compared to 55% for men, as well as 64% and 52% of housework, respectively.

Brazil also leads the world in murders of transgender and queer people.[13] The majority (70%) of transgender and gender diverse professionals we sampled have experienced gender-based prejudice at work as well.
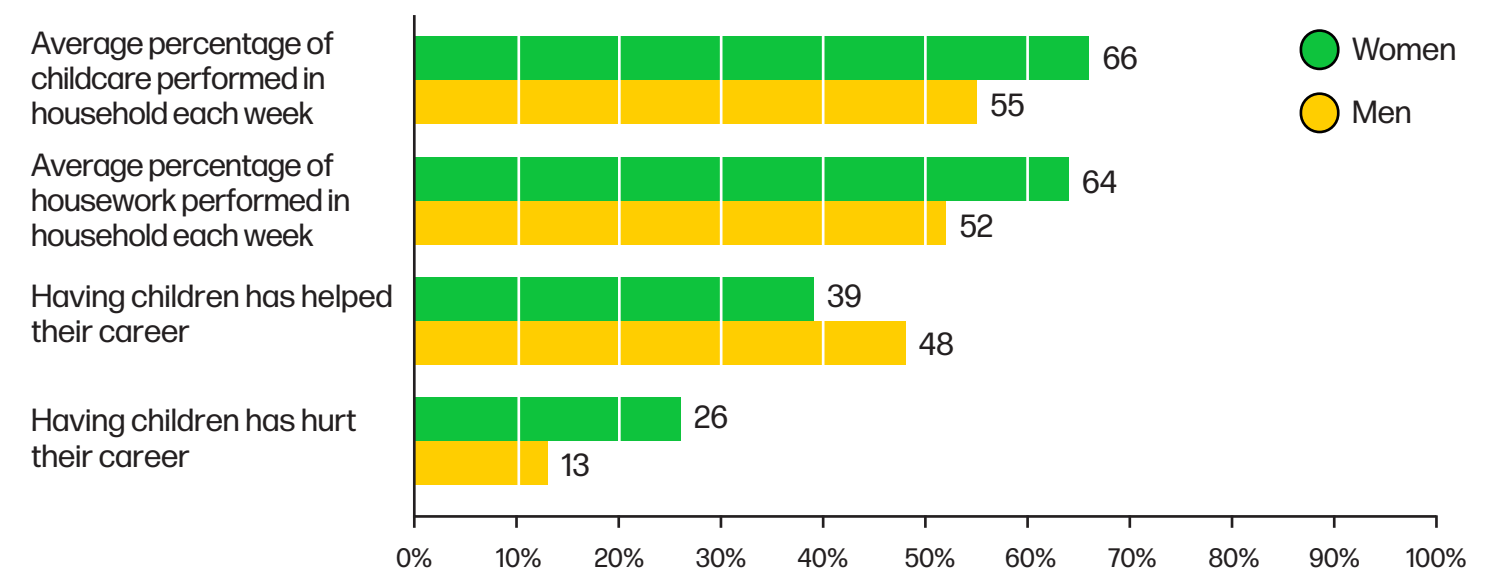
Race is a critical intersection to consider in Brazil. Brazil's census has five racial categories: *Branco* (White), *Pardo* (Brown or Multiracial), *Preto* (Black), *Amarelo* (Yellow or of Asian descent), and *Indígena* (Indigenous).[14] Scholar Edward E. Telles asserts that skin color is just as salient in a person's life as race, stating, "[The] Brazilian notion of color is equivalent to race because it is associated with a racial ideology that ranks persons of different colors."[15] Brazil has the largest Black population in the Americas, a demographic indicator of how the country remained central to the transatlantic slave trade for centuries until it was abolished in 1888.[16] As the country continues to grapple with this legacy, it must also confront the way race and gender continue to impact Brazilians' lives within the workplace.

Through an intersectional analysis of race and gender, we find that Preta women are 53% more likely to have experienced gender-based prejudice at work than Branca women.

## Professionals report:

Average percentage of childcare performed in household each week
- Women: 66
- Men: 55

Average percentage of housework performed in household each week
- Women: 64
- Men: 52

Having children has helped their career
- Women: 39
- Men: 48

Having children has hurt their career
- Women: 26
- Men: 13

# Germany

Germany is credited with having strong national policies that help advance equity for women.[17] In practice, women still provide more childcare on average than men, which may be linked to Germany having one of the highest gender pay gaps in the European Union, at 18%.[18]

In our survey sample, women in Germany are less likely than men to have been promoted or considered for promotion at their company in the last four years (44% vs. 57%). Other research has explored how women in Germany are less likely than men to occupy jobs in management positions, all while being more likely to work in sectors that command lower pay.[19]

The most notable data point we found pertaining to career advancement in Germany was at the intersection of gender and country of origin. In 2019,

more than one in four Germans had a "migrant background," meaning they—or one of their parents—were not born a German citizen.[20] Coqual's previous research has found that professionals who were not born in Germany face frequent reminders that they are never fully considered German.[21] Underlying these feelings of career stall are frequent invalidations in the workplace. Compared to German-born women, women not born in Germany face dismissive stereotypes from colleagues significantly more often, including assumptions that they are less credentialed (35%) and more junior than they are (32%). We also find that 56% of non-German women or women with multiple ethnic backgrounds were also significantly more likely than German women to say they were passed over for promotions in favor of less qualified colleagues.

## Professionals who have been passed over for promotions for colleagues who were less qualified

| | |
|---|---|
| Women with German background | 19% |
| Women with non-German or multiple backgrounds | 56% |

# India

India's hierarchical structure places heavy expectations on women to be wives and mothers.[22] Women in India have among the lowest rates of labor force participation in the world: just 28% of women are employed or actively seeking employment compared to 76% of men.[23]

Aside from gender, the Hindu caste system continues to dictate Indian social structure in countless ways, ranging from educational opportunities to marriage prospects to career experiences.[24] In Coqual's sample of full-time, white-collar professionals, Brahmins (upper caste) are overrepresented, comprising more than a third (34%) of respondents despite representing only 4% of India's total population.[25] In many ways, formal employment in India remains a privileged space.

Nearly half of lower-caste women (49%) in our sample say their social class background often has a negative impact on their professional experience,

while only 21% say the same about their gender. Ultimately, these social factors can contribute to challenging retention issues for companies, as over half (55%) of lower-caste women in our sample say they have often considered leaving their jobs in the past year.

Our data also suggests that women of lower castes expend more energy to fit in at work. In workplaces predominately comprising of professionals from upper-caste backgrounds, lower-caste professionals may find that any reference to their life outside of work holds detrimental implications. As we noted in *Equity and Ethnicity at Work*, Dalit and Adivasi professionals may try various strategies to avoid calling attention to their caste background by dropping their surnames, adopting upper-caste norms and activities, or converting to Buddhism.[26] We find that 71% of lower-caste women often change what they share about family at work, and 63% often hide their childcare responsibilities from colleagues.

## Percentage of lower-caste women who say...

Their gender often negatively affects their professional experience

**21%**

They have often considered leaving their jobs in the past year

**55%**

Their social class background often negatively affects their professional experience

**49%**

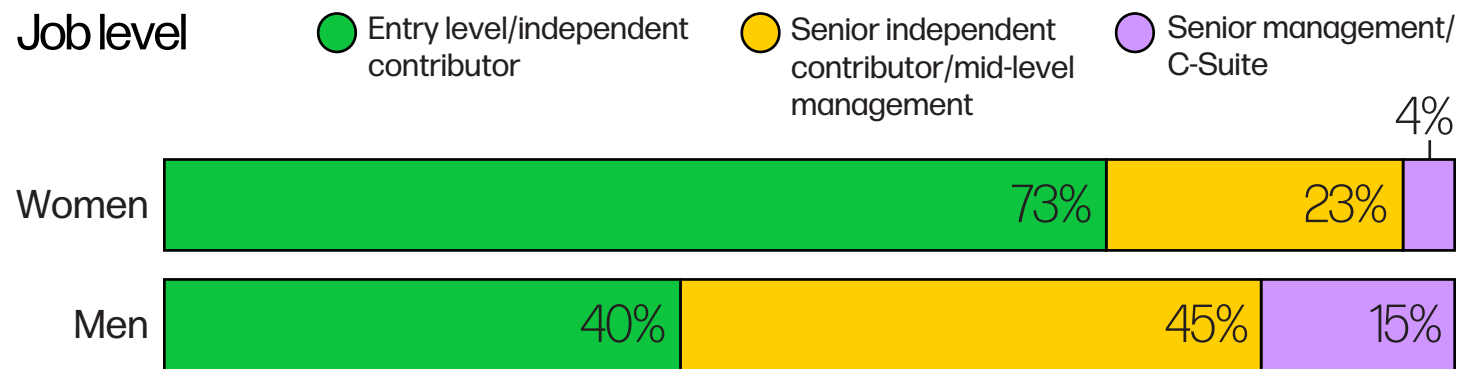They often change what they share about their family to fit in at work

**71%**

# Japan

Amidst rising unemployment, a shrinking economy, declining birth rates, and an aging population, women remain vastly underrepresented in leadership roles.[27] They face one of the widest gender pay gaps among advanced economies and struggle to gain equal ground in labor force participation overall.[28]

Japan's labor model follows a lifetime employment system, which offers lifetime job security along two tracks that are largely determined after college graduation: (1) regular employees, or *seishain*, who are the primary beneficiaries of the lifetime employment system and receive stronger benefits and annual bonuses; and (2) nonregular workers, who receive lower pay, fewer benefits, and less job security.[29] Despite women's high rate of educational attainment in Japan, they are much more likely than men to be nonregular employees.[30]

Our sample shows a dramatic drop-off of women from entry-level to senior positions. Nearly three-quarters of women in our sample (73%) are in entry-level positions, 23% in middle management, and only 4% in senior management or C-Suite positions. By contrast, men in our sample have more equitable representation, with 40% in entry-level positions, 45% in middle management, and 15% in senior management or C-Suite positions.

Some of the most noteworthy findings for Japan relate to eldercare. Eldercare is a growing focus in Japan, where currently 29% of the country is 65 or over, and by 2060, seniors are predicted to make up more than a third (38%) of the population.[31] Cultural expectations around eldercare result in a burden of labor that inevitably falls on women.[32] At present, we already find that women agree significantly more than men that their eldercare responsibilities have hurt their careers (42% vs. 31%), and this discrepancy has the potential to worsen.

## Job level

- ● Entry level/independent contributor
- ● Senior independent contributor/mid-level management
- ● Senior management/C-Suite

| | Entry level/independent contributor | Senior independent contributor/mid-level management | Senior management/C-Suite |
|---|---|---|---|
| Women | 73% | 23% | 4% |
| Men | 40% | 45% | 15% |

# South Africa

In South Africa, we find that women's professional experiences are negatively impacted by gender significantly more often than men's (23% vs. 10%). More than a quarter (26%) of women in our sample say that someone of their gender could never achieve a top position at their company. This is also reflected by our sample: men have a higher representation in senior-level positions than women (24% vs. 17%).

Race is a critical factor to consider when assessing the gendered experiences of South African professionals. The legacy of apartheid persists in South Africa, revealing itself in every facet of society. Research has shown that White professionals hold disproportionate leadership representation, as over half (63%) of top management positions are held by White professionals.[33]

This is mirrored in our sample, where 20% of Black men and 19% of Black women are in senior-level positions compared to 37% of White men and 21% of White women. Coloured* and Asian professionals have relatively lower representation overall: 24% of Coloured men, 3% of Coloured women, 20% of Asian men, and 14% of Asian women are in senior-level positions. Overall, 30% of White professionals occupy senior-level roles compared to just 19% of professionals who are not White.

*In South Africa, the term "Coloured" refers to people of mixed-race ancestry. Restrictions on Coloured people were abolished with the end of apartheid, but the descriptor remains common in society and still remains a census designation.[34]

## Professionals at the senior management/C-Suite level

**White** — 30% of 105 total employees

**Black** — 19% of 432 total employees

**Coloured** — 13% of 56 total employees
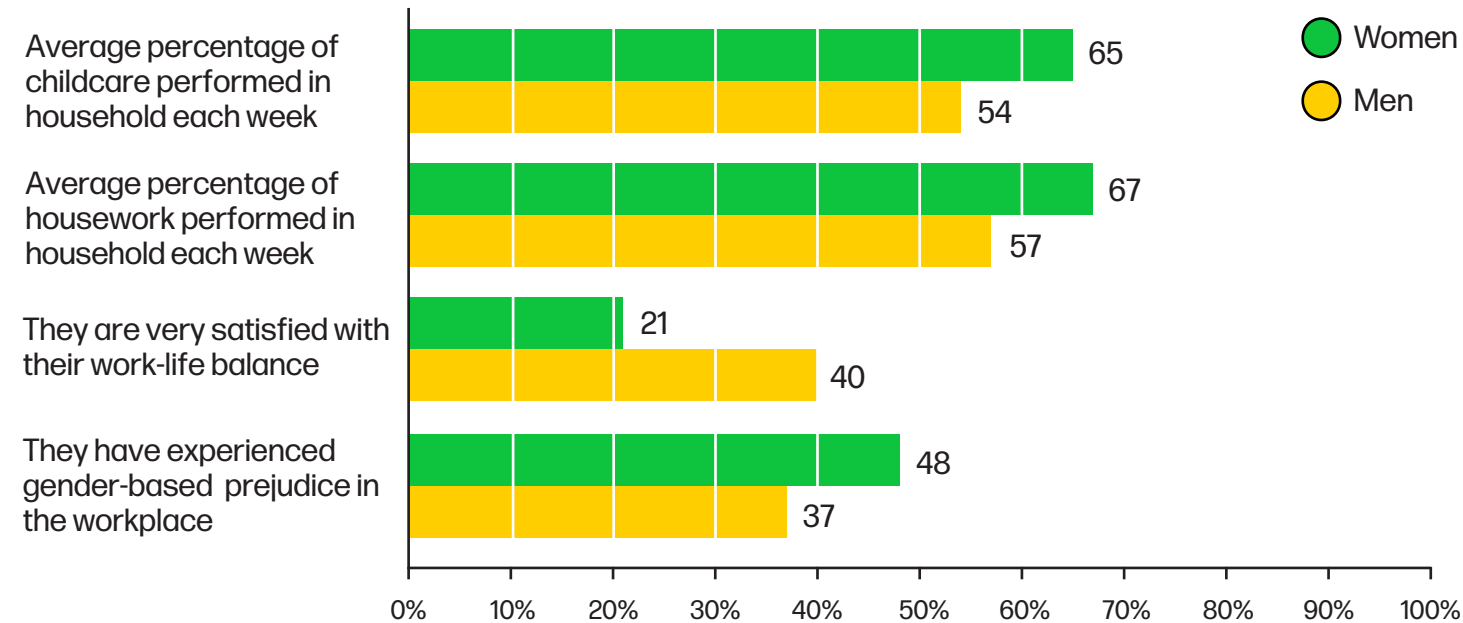
**Asian** — 17% of 36 total employees

# United Kingdom

According to an analysis of Organisation for Economic Co-operation and Development (OECD) data, increasing female employment rates would add £124 billion to the UK's economy per year, an incentive that many hope will encourage companies to increase women in leadership.[35]

Research shows women have limited access to male-dominated professional networks and the "old boys' club" culture. Women are often lower in rank in industries made up of both men and women, and they are also concentrated in industries that command lower pay than traditionally male-dominated sectors.[36]

According to our survey data, barely one in five women (21%) in the UK are very satisfied with their work-life balance. We also find that women in the UK perform significantly more of the childcare on average (65%) than men do (54%), as well as more of the housework (67% vs. 57%, respectively). In our data, only 19% of women say having children has helped their career.
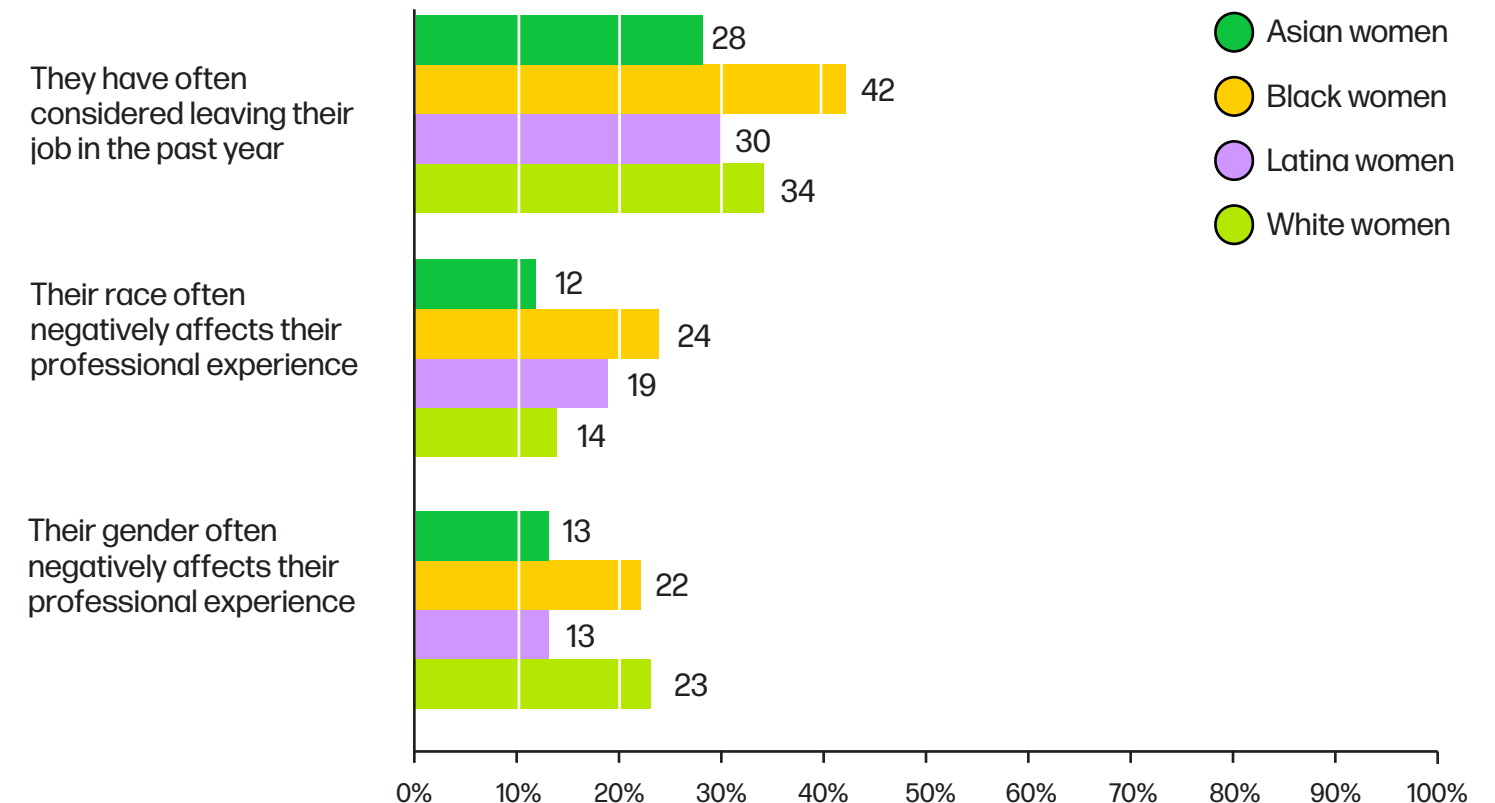
During the focus group interviews with professionals in the UK, a prominent theme amongst women was how certain roles and responsibilities within the workplace are heavily gendered in nature, with examples including expectations on who will pour the coffee or tea. We emphasize how moving more women into leadership roles will require a more holistic approach toward addressing inequities along the career pipeline, including how workload expectations and opportunities differ by gender and reinforce existing gender norms.

## Professionals report:



Average percentage of childcare performed in household each week — Women: 65, Men: 54

Average percentage of housework performed in household each week — Women: 67, Men: 57

They are very satisfied with their work-life balance — Women: 21, Men: 40

They have experienced gender-based prejudice in the workplace — Women: 48, Men: 37

Legend: ● Women ● Men

# United States

US women still carry many burdens at work and home—especially given the ongoing legislative attacks on cisgender and transgender women, ranging from reproductive rights to gender-affirming care.[37] US women still face barriers to career advancement as well. According to Coqual data, two-thirds (67%) of men say that they have been promoted or considered for promotion at their company in the last four years compared to only about half (53%) of women. Only 38% of women say their network is very strong compared to nearly half of men in our survey.

We also explore the compounding impact of race and gender. In our sample, 24% of Black women and 19% of Latina women say race often negatively impacts their career. By contrast, just 14% of White women say this about their race. Furthermore, although not statistically significant, we also find disparities in retention, where 42% of Black women have often considered leaving their jobs within the last year compared to 28% of Asian women, 30% of Latina women, and 34% of White women.

## Professionals who say:



They have often considered leaving their job in the past year — Asian women: 28, Black women: 42, Latina women: 30, White women: 34

Their race often negatively affects their professional experience — Asian women: 12, Black women: 24, Latina women: 19, White women: 14

Their gender often negatively affects their professional experience — Asian women: 13, Black women: 22, Latina women: 13, White women: 23

Legend: ● Asian women ● Black women ● Latina women ● White women

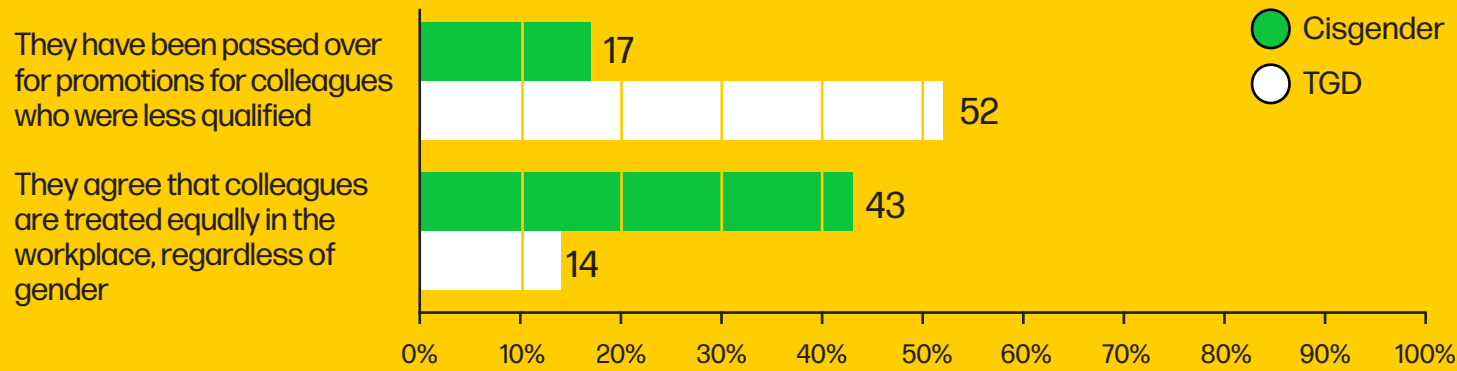# Transgender voices around the world

Achieving equity and inclusion in the workplace requires targeted attention toward supporting people of all marginalized identity groups, especially transgender and gender diverse (TGD) professionals.

In markets where Coqual had an adequate sample to conduct an analysis, we explored the unique experiences and challenges faced by TGD professionals. Across the globe, we find that TGD professionals experience frequent microaggressions, including being told that their gender identity makes their colleagues uncomfortable, accusations that their gender nonconformity is just a phase, colleagues being overly avoidant or inappropriate, and being constantly misgendered by their colleagues and managers. Unfortunately, many cisgender professionals do not seem to be aware of these distinct experiences, which helps explain why the needs of TGD professionals are often overlooked.

## In Japan...

### Professionals who say:

They have been passed over for promotions for colleagues who were less qualified
- Cisgender: 17
- TGD: 52

They agree that colleagues are treated equally in the workplace, regardless of gender
- Cisgender: 43
- TGD: 14

Legend: ● Cisgender  ○ TGD

(Chart axis: 0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%)

## In Brazil...

### About 1 in 5 transgender and gender diverse employees are often...

- Told their gender nonconformity is just a phase
- Told they make colleagues uncomfortable because of their gender identity
- Misgendered

## In the US...

### Transgender and gender diverse professionals who often experience the following microaggressions at work:

**47%** Colleagues tell them their gender nonconformity is just a phase

**54%** Colleagues misgender them

**41%** They are told they make colleagues uncomfortable because of their gender identity

## "My partner didn't get to see it"

I married my partner, and after we'd been married a number of years, they informed me that their gender identity was not appropriate for who they were. I supported my partner through a transition to female while I was employed, which was difficult to say the least, because it was absolutely not something I could bring to work in any way, shape, or form. When my partner took their life, I couldn't talk about it openly in my work environment. But in the last five years, people have become more open about being nonbinary and transgender, and I love it. But it makes me sad that my partner didn't get to see it happening.

**— Queer, nonbinary Gen X professional in the US**

## Beyond the binary: The future of gender in the global workplace

There is a consensus amongst experts, scholars, practitioners, and employees across the world that the rigid gender binary is outdated, and its associated narrow view of identity is beginning to fade. In our data, we discovered a major generational shift in how respondents understand their gender identity and expression. We gave our survey-takers six questions regarding experiences of their gender and asked them to choose a position on a sliding scale from "not masculine at all" to "extremely masculine," and "not feminine at all" to "extremely feminine" (see the next page).

We found a generational decline in the averages for men's masculine gender expression and a generational increase in the averages for men's feminine gender expression. We found the same pattern for women, where there is a generational decline in the averages for women's feminine expression and a generational increase in the averages for women's masculine gender expression.

Put simply: Younger professionals have less extreme conceptions of their gender identity compared to older generations. They define themselves through both masculine and feminine qualities and express it in the way they feel, dress, think, work, and show up at home.

# Gender binary across markets

This chart represents the mean (average) score of gender expression across respondents. The higher score/deeper color indicates a stronger sense of masculine or feminine expression. In younger generations, our data suggests that men report expressing themselves as more feminine and less masculine compared to older generations, and women report expressing themselves as more masculine and less feminine.

(1) Not at all    (5) Extremely

Feminine
Masculine
*A dash indicates fewer than 25 observations

| | | Feminine gender expression | | | Masculine gender expression | | |
|---|---|---|---|---|---|---|---|
| | | Baby Boomers & Silent Gen. | Gen. X | Millennials & Gen. Z | Baby Boomers & Silent Gen. | Gen. X | Millennials & Gen. Z |
| Full sample | Women | 3.9 | 3.8 | 3.8 | 1.7 | 2.3 | 2.5 |
| | Men | 1.7 | 2.4 | 2.7 | 3.9 | 3.8 | 3.7 |
| Australia | Women | -- | 3.9 | 3.7 | -- | 2.3 | 2.3 |
| | Men | 1.7 | 2.4 | 2.6 | 3.9 | 3.6 | 3.5 |
| Brazil | Women | -- | 4.2 | 4.0 | -- | 2.1 | 1.8 |
| | Men | -- | 1.6 | 2.1 | -- | 4.4 | 4.0 |
| Germany | Women | -- | 3.6 | 3.7 | -- | 2.3 | 2.5 |
| | Men | 2.0 | 2.3 | 2.8 | 3.6 | 3.6 | 3.6 |
| India | Women | -- | 4.1 | 4.0 | -- | 3.6 | 3.6 |
| | Men | -- | 3.7 | 3.2 | -- | 4.0 | 3.7 |
| Japan | Women | -- | 3.5 | 3.5 | -- | 2.1 | 2.3 |
| | Men | 1.6 | 1.9 | 2.4 | 3.8 | 3.5 | 3.4 |
| South Africa | Women | -- | 3.7 | 3.8 | -- | 2.6 | 2.8 |
| | Men | -- | 1.9 | 2.2 | -- | 3.9 | 3.8 |
| United Kingdom | Women | -- | 3.7 | 3.7 | -- | 1.8 | 2.3 |
| | Men | 2.0 | 2.3 | 2.9 | 3.5 | 3.5 | 3.5 |
| United States | Women | 4.2 | 3.8 | 3.7 | 1.6 | 2.1 | 2.5 |
| | Men | 1.6 | 2.5 | 3.1 | 3.9 | 3.9 | 3.7 |

# Define, Refine, Reimagine

Leaders must look beyond the binary and create more equitable workplaces through gender-inclusive policies, programs, and people management strategies. We lean on a new framework—Define, Refine, Reimagine—to provide tangible solutions for DE&I practitioners and senior leaders to advance gender equity.

## Define

**Define** refers to cultivating a shared understanding of complex issues among relevant stakeholders to achieve organizational DE&I goals. Companies must define the mission, vision, and purpose of any DE&I initiative and center accountability throughout the process. Through qualitative and quantitative data, company leaders can measure the effectiveness of the defined goals and locate barriers to equity in the workplace.

- **Define gender through a global lens.** It is important to consider how across the world, issues related to gender, career advancement, and care are heavily contextual. Companies that model DE&I practices that appeal to the unmet needs of members of the workforce will be more competitive in retaining and attracting talent.

- **"Intersectionality" defined.** "Intersectionality" is a key concept that is often misused and misunderstood. We define a fundamental component of intersectionality in the full report—the "matrix of domination,"[38] which is consistently overlooked. We highlight how intersectionality does not merely refer to an assortment of one's multiple and interconnected identity traits, but rather how various systems, policies, and cultural norms intersect to disproportionately impact the most marginalized groups throughout the world (e.g., the caste system in India, the lifetime employment system in Japan, the lack of non-discrimination policies for transgender employees in the UK).

- **"Gender" defined.** The full report provides a glossary of terms that company leaders should learn in order to be confident in speaking about and supporting employees of all gender identities. These definitions should serve as a foundation for internal and external DE&I efforts.

- **The power of self-ID: transform the *defined* into the *definers*.** Self-ID campaigns promote employees' ability to self-report their race, gender, sexual orientation, and other identity characteristics to help companies identify systemic barriers related to career advancement. We provide recommendations for incorporating self-ID into company-wide practices and procedures by addressing the personal impact, the importance of company-wide communication, and the contextually nuanced legal landscape. Coqual recommends disaggregating data domestically and globally, as the systemic and cultural contexts underlying these campaigns are critical to consider as well.

# Refine

**Refine** refers to the process in which companies continually assess the effectiveness of existing policies, programs, and procedures in generating equitable outcomes. Companies can implement, revise, or simply reinforce data-driven solutions that prioritize the most marginalized communities.

- **Assess the way work is gendered.** Workplace roles and responsibilities are also heavily gendered. Across all job levels, women are often tasked with integral but undervalued administrative and support tasks, or what has been referred to as "office housework."[39] Organizations need to critically assess whether this issue is prevalent within their own workplace contexts, as it may be creating barriers to development and advancement for women.

- **Reexamine how women's networks operate.** Employee resource groups and identity-focused networks, such as women's networks, can help employees build relationships and access professional support. However, historically, women's networks have not always been inclusive to all women, including transgender women. Professional women's networks must be inclusive to women of all races and transgender women. There should also be spaces for those who identify outside of the gender binary.

- **Diversify leadership through executive sponsorship.** Those in power often have a subconscious tendency to fall into the "mini-me syndrome," where senior leaders advocate for those who are most like them.[40] Companies need to create an organization-wide culture that cuts across lines of difference. Those in power should be encouraged to serve as sponsors and also be held accountable to advocate on behalf of employees across gender, race, and other dimensions of identity.

- **Refine care policies and norms**

  - **Childcare:** Companies should reevaluate parental leave policies to ensure that what is provided for men and women is standardized and equitable. Companies should also provide insurance benefits and family planning resources that cover egg-saving services and in vitro fertilization (IVF), as well as support employees interested in fostering and adopting.

  - **Eldercare:** Our research shows how eldercare labor often falls on women. As populations age and eldercare needs grow, companies must be intentional about providing systems of support for employees to care for their elders.

  - **Care for others and self:** Policies need to be expanded to include dependents outside of children and elders, including extended family, friends, and community members. Companies should also provide robust resources to support employees' mental, psychological, emotional, and physical health.

- **Build effective flexible work policies.** Flexible work is a policy proven to reduce work-life conflict and turnover intentions for women.[41] Companies must refine their existing infrastructure for hybrid and remote work and monitor the effectiveness of flexible work policies to ensure that they are equitable for everyone.

# Reimagine

**Reimagine** challenges companies to prepare for the future of the global workplace. The most successful companies proactively anticipate market trends and strategize accordingly. Companies must take the same approach when it comes to the needs of their employees. With constantly evolving definitions of gender, and infinite ways to refine existing structures, the process of reimagining requires companies to have an inclusive culture of innovation.

- **Reimagine leadership norms.** Standards of professionalism that inevitably influence talent management and performance evaluation systems have privileged those who align with traditionally masculine identity traits.[42] Companies must evaluate how these systems can lead to a lack of gender diversity in executive and senior roles.

- **Reimagine masculinity.** We detail examples across each market in which the brunt of caregiving labor falls on women. For instance, 87% of primary parental leave is taken by women in Australia,[43] and women in Brazil are provided with 120 days of full pay for maternity leave compared to only five days of paternity leave for men.[44] Men in leadership need to recognize that the culture shift begins at the top. They have to serve as role models for how men should balance family and caregiving responsibilities within their careers.

- **Reimagine gender.** Our report makes clear that transgender and gender diverse professionals face frequent prejudice, including being constantly misgendered, told their gender nonconformity is just a phase, or told their gender identity makes their colleagues uncomfortable. Companies should prioritize workplace norms for supporting transgender and gender diverse employees, including gender transition plans, gender-neutral restrooms, gender-neutral dress codes, trans-specific diversity trainings, and correct pronoun and name usage.[45] Coqual also shares suggestions for trans-inclusive policies and resources, which could include health care benefits that cover gender-affirming surgery, mentor and sponsorship programs, among others.

> "Most workplaces aren't ready for the openness that younger people have around expressing and talking about gender identity in new ways—and that's dangerous."
>
> — Alison Pullen, PhD, Professor of Gender, Work, and Organization, Macquarie University, Australia

## Endnotes

1. "Sexual & Gender Minority: Terms and Definitions," National Institutes of Health Office of Equity, Diversity, and Inclusion, accessed June 19, 2023, https://www.edi.nih.gov/people/sep/lgbti/safezone/terminology.

2. "Understanding Gender," *Reimagine Gender*, https://www.reimaginegender.org/understanding-gender.

3. The World Bank, "Labor Force, Female (% of Total Labor Force)." accessed June 12, 2023, https://data.worldbank.org/indicator/SL.TLF.TOTL.FE.ZS?end=2021&start=1990&view=chart.

4. "The World's Women 2020: Trends and Stats," United Nations Department of Economic and Social Affairs, 2020, https://worlds-women-2020-data-undesa.hub.arcgis.com/apps/0d1ff2530f17451bb8437c6ea584282e/explore; "Facts and Figures: Women's Leadership and Political Participation," UN Women, 2023, https://www.unwomen.org/en/what-we-do/leadership-and-political-participation/facts-and-figures.

5. Tim Wise, "Is Sisterhood Conditional?: White Women and the Rollback of Affirmative Action," Tim Wise, Antracist Essayist, Author and Educator, September 23, 1998, http://www.timwise.org/1998/09/is-sisterhood-conditional-white-women-and-the-rollback-of-affirmative-action/; Tara J. Yosso et al., "Chapter 1: From Jim Crow to Affirmative Action and Back Again: A Critical Race Discussion of Racialized Rationales and Access to Higher Education," *Review of Research in Education* 28, no. 1 (2004): 1–25, https://doi.org/10.3102/0091732X028001001.

6. "Gender Workplace Statistics at a Glance," Workplace Gender Equality Agency, February 2022, https://www.wgea.gov.au/sites/default/files/documents/Stats_at_a_glance_Feb2022.pdf.

7. Ibid.

8. Melissa J. Hodges and Michelle J. Budig, "Who Gets the Daddy Bonus?: Organizational Hegemonic Masculinity and the Impact of Fatherhood on Earning," *Gender and Society* 24, no.7, 2010: 717–745, https://journals.sagepub.com/doi/10.1177/0891243210386729; Michelle J. Budig and Paula England, "The Wage Penalty for Motherhood," *American Sociological Review* 66, no. 2 (2001): 204-225, https://doi.org/10.2307/2657415.

9. Shelly Lundberg and Elaina Rose, "Parenthood and the Earnings of Married Men and Women," *Labour Economics* 7, no. 6 (November 2000): 689–710, https://doi.org/10.1016/S0927-5371(00)00020-8.

10. "Indigenous Employment Index," Minderoo Foundation, accessed May 2, 2023, https://www.minderoo.org/Indigenous-employment-index/.

11. Maria Laura Canieu and Andrea Carvalho, "Working for Less in Brazil," Human Rights Watch (blog), March 8, 2018, https://www.hrw.org/news/2018/03/08/working-less-brazil; Ana Carla Abrão Costa, Laura Maconi, and Marina Hellmeister, *The Gender Gap Lifecycle: Evidence from the Financial Services and Public Sectors in Brazil* (Oliver Wyman, 2018), https://www.oliverwyman.com/content/dam/oliver-wyman/v2/publications/2018/september/The%20Gender%20Gap%20Lifecycle.pdf; "Global Gender Gap Report 2022: Chapter 1: Benchmarking Gender Gaps in 2022," World Economic Forum, July 13, 2022, https://www.weforum.org/reports/global-gender-gap-report-2022/in-full/1-benchmarking-gender-gaps-2022#1-1-country-coverage; "Gender Statistics: Household Chores Affect Insertion of Women in Labor <arket Agência de Notícias - IBGE, March 7, 2018, https://agenciadenoticias.ibge.gov.br/en/agencia-press-room/2185-news-agency/releases-en/20262-gender-statistics-household-chores-affect-insertion-of-women-in-labor-market; Country Note: Education at a Glance 2018: Brazil (Organisation for Economic Co-operation and Development, 2018), https://download.inep.gov.br/acoes_internacionais/estatisticas_educacionais/ocde/education_at_a_glance/Country_Note_Nota_sobre_o_Brasil.pdf.

12. Gender Statistics: Household Chores Affect Insertion of Women in Labor Market Agência de Notícias - IBGE, March 7, 2018, https://agenciadenoticias.ibge.gov.br/en/agencia-press-room/2185-news-agency/releases-en/20262-gender-statistics-household-chores-affect-insertion-of-women-in-labor-market; Global Gender Gap Report 2021, World Economic Forum, March 2021, https://www3.weforum.org/docs/WEF_GGGR_2021.pdf; Maria Laura Canieu and Andrea Carvalho, "Working for Less in Brazil," Human Rights Watch (blog), March 8, 2018, https://www.hrw.org/news/2018/03/08/working-less-brazil.

13. Ester Pinheiro, "Brazil Continues to Be the Country with the Largest Number of Trans People Killed," Pulitzer Center, January 24, 2022, https://pulitzercenter.org/stories/brazil-continues-be-country-largest-number-trans-people-killed; "TMM Absolute Numbers (2008 – Sept 2022)," Transgender Europe (TGEU), accessed June 19, 2023, https://transrespect.org/en/map/trans-murder-monitoring/.

14. Marina dos Santos et al., "Ethnic/Racial Disparity in Mortality from COVID-19: Data for the Year 2020 in Brazil," *Spatial Demography* 11, no. 1 (2023): 1–17, https://doi.org/10.1007/s40980-022-00112-2.

15. Edward E. Telles, "Rethinking Brazilian Race Relations." In *Race in Another America: The Significance of Skin Color in Brazil* (Princeton University Press, 2004), 215-238.

16. Myrian Sepulveda Santos, "The Legacy of Slavery in Contemporary Brazil," African Heritage and Memories of Slavery in the South Atlantic World (2015), https://www.academia.edu/29562144/THE_LEGACY_OF_SLAVERY_IN_CONTEMPORARY_BRAZIL.

17. Global Gender Gap Report 2022, Chapter 1: Benchmarking GEnder Gaps in 2022," World Economic Forum, July 13, 2022, https://www.weforum.org/reports/global-gender-gap-report-2022/in-full/1-benchmarking-gender-gaps-2022.

18. "Gender Pay Gap: Germany Remains among EU States with Highest Disparity,"Statistisches Bundesamt (Destatis), accessed June 19, 2023, https://www.destatis.de/Europa/EN/Topic/Population-Labour-Social-Issues/Labour-market/gender_pay_gap.html.

19. "Women in Executive Positions: Germany below EU Average," Statistisches Bundesamt (Destatis), accessed June 19, 2023, https://www.destatis.de/Europa/EN/Topic/Population-Labour-Social-Issues/Labour-market/Female_Executive.html; *Who Takes Care of Children, Household, and the Elderly?* (Federal Ministry for Family Affairs, Senior Citizens, Women and Youth, August 2020), https://www.bundesregierung.de/breg-en/service/information-material-is-sued-by-the-federal-government/who-takes-care-of-children-household-and-the-elderly--1781938.

20. "German Population of Migrant Background Rises to 21 Million," *DW,* July 28, 2020,, https://www.dw.com/en/german-population-of-migrant-background-rises-to-21-million/a-54356773.

21. *Belonging Matters Everywhere: An Examination of Workplace Cultures in the United Kingdom, Germany, and Poland* (New York: Coqual, 2020).

22. Jia Wang and Gary N. McLean, "Promoting Diversity in India: Where Do We Go From Here?," *Advances in Developing Human Resources* 18, no. 1 (February 1, 2016): 102–113, https://doi.org/10.1177/1523422315614930.

23. "ILO Data Explorer," International Labour Organization, accessed May 3, 2023, https://www.ilo.org/shinyapps/bulkexplorer46/?lang=en&segment=indicator&id=EAP_DWAP_SEX_AGE_RT_A&ref_area=IND.

24. Kim Thelwell, "How the Caste System Affects People in India," The Borgen Project, December 11, 2020, https://borgenproject.org/caste-system-affecting-people-in-india/.

25. Neha Sahgal et al., "Religion in India: Tolerance and Segregation," Pew Research Center, June 29, 2021, https://www.pewresearch.org/religion/2021/06/29/religion-in-india-tolerance-and-segregation/.

26. Krithika Varagur, "Converting to Buddhism as a Form of Political Protest," *The Atlantic*, April 11, 2018, https://www.theatlantic.com/international/archive/2018/04/dalit-buddhism-conversion-india-modi/557570/; Brinda Das, "Youngsters Drop Surnames to Foster Caste Equality," *The New Indian Express,* last modified June 3, 2019, https://www.newindianexpress.com/cities/bengaluru/2019/jun/03/youngsters-drop-surnames-to-foster-caste-equality-1985119.html; Suryakant Waghmore, "In Charts: Vegetarianism in India Has More to Do with Caste Hierarchy Than Love for Animals," Scroll.in, April 6, 2017, https://scroll.in/article/833178/vegetar-ianism-in-india-has-more-to-do-with-caste-hierar-chy-than-love-for-animals.; *Equity and Ethnicity at Work.* (New York: Coqual, 2022).

27. "Employment : Labour Force Participation Rate, by Sex and Age Group," Organisation for Economic Co-operation and Deveopment, accessed May 4, 2023, https://stats.oecd.org/index.aspx?queryid=103872; "Chapter 12: Labour," in *Statistical Handbook of Japan 2022* (Statistics Bureau of Japan, 2022), https://www.stat.go.jp/english/data/handbook/c0117.html#c12; Sean Fleming, "Japan's Workforce Will Be 20% Smaller by 2040," World Economic Forum, Feb 12, 2019, https://www.weforum.org/agenda/2019/02/japans-workforce-will-shrink-20-by-2040/; Mariko Oi, "Why Japan Can't Shake Sexism," *BBC,* April 9, 2021, https://www.bbc.com/worklife/article/20210405-why-japan-cant-shake-sexism; *Summary of Vital Statistics* (Ministry of Health, Labor, and Welfare of Japan), accessed June 19, 2023, https://www.mhlw.go.jp/english/database/db-hw/populate/index.html.

28. Ibid.

29. Makiko Inoue and Ben Dooley, "A Job for Life, or Not? A Class Divide Deepens in Japan," *The New York Times,* last accessed May 18, 2021, https://www.nytimes.com/2020/11/27/business/japan-workers.html.

30. Kazuo Yamaguchi, *Causes and Effects of Gender Occupational Segregation: Overlooked Obstacles to Gender Equality* (Singapore: Springer, 2019): ch. 3, http://link.springer.com/10.1007/978-981-13-7681-8_3; "Share of Employees Working in Non-Regular Employment in Japan from 2003 to 2022, by Gender," Statista, February 27, 2023, https://www.statista.com/statistics/1126055/japan-share-employees-non-regular-employment-by-gender/.

31. "Population Estimates: Monthly Report," Statistics Bureau of Japan, March 2023, https://www.stat.go.jp/english/data/jinsui/tsuki/index.html; *Annual Report on the Ageing Society [Summary] FY 2019* (Cabinet Office, Japan, 2019), https://www8.cao.go.jp/kourei/english/annualreport/2019/pdf/2019.pdf.

32. Guat Tin Ng, "Learning from Japanese Experience in Aged Care Policy," *Asian Social Work and Policy Review* 1, no. 1 (2007): 36–51, https://doi.org/10.1111/j.1753-1411.2007.00004.x.

33. *22nd Commission for Employment Equity: Annual Report 2021-22* (Commission for Employment Equity, 2022), https://www.abp.org.za/wp-content/uploads/2022/06/CEE-22nd-Annual-Report-2021-2022.pdf.

34. "People and Society," The World Factbook, last modified November 16, 2021, https://www.cia.gov/the-world-factbook/countries/south-africa/#people-and-society/.

35. *Women in Work 2022* (PwC, 2022), https://www.pwc.co.uk/economic-services/WIWI/pwc-women-in-work-index-2022.pdf.

36. Kate Forrester, "Patronised, Talked Down To and Harrassed: Parliament's Boys' Club Culture Laid Bare," *HuffPost*, February 19, 2018, https://www.huffingtonpost.co.uk/entry/patronised-talked-down-to-and-harassed-parliaments-boys-club-culture-laid-bare_uk_5a8aa36ae4b05c2bcacce1a4; Laura Jones, *Women's Progression in the Workplace* (Government Equalities Office, October 2019), https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/840404/KCL_Main_Report.pdf.

37. "Tracking the States Where Abortion Is Now Banned," *The New York Times*, last modified June 16, 2023, sec. U.S., https://www.nytimes.com/interactive/2022/us/abortion-laws-roe-v-wade.html; "2023 Anti-Trans Bills: Trans Legislation Tracker," accessed May 4, 2023, https://translegislation.com.

38. Patricia Hill Collins, *Black Feminist Thought: Knowledge, Consciousness, and the Politics of Empowerment*, (New York: Routledge, 1990): 21, https://www.taylorfrancis.com/books/mono/10.4324/9780203900055/black-feminist-thought-patricia-hill-collins.

39. Joan C. Williams and Marina Multhaup, "For Women and Minorities to Get Ahead, Managers Must Assign Work Fairly," *Harvard Business Review,* March 5, 2018, https://hbr.org/2018/03/for-women-and-minorities-to-get-ahead-managers-must-assign-work-fairly.

40. Sylvia Ann Hewlett, Maggie Jackson, and Ellis Cose, with Courtney Emerson, *Vaulting the Color Bar: How Sponsorship Levers Multicultural Professionals into Leadership* (New York: Coqual, 2012); *The Sponsor Dividend* (New York: Coqual, 2019).

41. Merlin Mythili Shanmugam and Bhawna Agarwal, "Support Perceptions, Flexible Work Options and Career Outcomes: A Study of Working Women at the Threshold of Motherhood in India," *Gender in Management* 34, no. 4 (2019): 254-286, https://doi.org/10.1108/GM-12-2018-0157.

42. Tema Okun and Kenneth Jones, "(divorcing) White Supremacy Culture: Coming Home to Who We Really Are," *White Supremacy Culture*, last updated June 2023, https://www.whitesupremacyculture.info/; Aysa Gray, "The Bias of 'Professionalism' Standards," *Stanford Social Innovation Review*, June 4, 2019, https://ssir.org/articles/entry/the_bias_of_professionalism_standards#.

43. "Australia's Gender Equality Scorecard," Workplace Gender Equality Agency, December 2022, https://www.wgea.gov.au/sites/default/files/documents/WGEA-Gender-Equality-Scorecard-2022.pdf.

44. Maria Fernanda de Medeiros Redi et. al, "Employment and Employee Benefits in Brazil: Overview," Thomas Reuters Practical Law, March 1, 2021, https://uk.practicallaw.thomsonreuters.com/1-503-5032?transitionType=Default&contextData=(sc.Default)&firstPage=true.

45. Christian N. Thoroughgood, Katina Sawyer, and Jennica R. Webster, "Creating a Trans-Inclusive Workplace," *Harvard Business Review*, March 1, 2020, https://hbr.org/2020/03/creating-a-trans-inclusive-workplace; Tanja Gut, Lilith Whiley, and T. Alexandra Beauregard, "HRM and the Case of Transgender Workers: A Complex Landscape of Limited HRM 'Know How' with Some Pockets of Good Practice," *Human Resource Management International Digest* 23, no. 2 (November 2018): 7–11, https://doi.org/10.1108/HRMID-06-2017-0121.

**Coqual CEO**
**Lanaya Irvin**

**Primary Research Lead**
Sy Stokes, PhD
Vice President, Research

**Secondary Research Lead**
Nathan M. Castillo, PhD
Vice President, Research

**Research Team**
**Andy Chan**
Senior Research Associate

**Emily Eaton**
Research Associate

**Emily Gawlak**
Senior Writer

**Julia Taylor Kennedy**
Executive Vice President

**Angela Qian**
Director, Research

**Emilia Yu**
Senior Research Manager

**External Team**
**Jess Kuronen**
Design and Data Visualization

**Jill Merriman**
Copyeditor

**Advisors**
**Melanie Brewster, PhD**
Professor of Psychology and
Education at Teachers College,
Columbia University, United States

**Sam H. L. Fouad, JD**
Professor, Fundação Getulio Vargas'
Brazilian School of Public and
Business Administration, Brazil

**Tina Opie, PhD**
Chief Vision Officer, Opie Consulting
Group LLC; Visiting Scholar at Harvard
Business School; Associate Professor
of Management at Babson College,
United States

**Kathleen McGinn, PhD**
Cahners-Rabb Professor of Business
Administration, Harvard Business
School, United States

**Sponsor Relations**
**Lohen Parchment**
Senior Associate, Outreach & Strate-
gic Partnerships

**Peggy Shiller**
Chief of Staff to CEO

**Allegra Varnadore**
Director, Strategic Outreach and
Partnership

**Lead Sponsor**
**Baker Tilly**
Shane Lloyd

**Sponsors**
**Bristol Myers Squibb**
Pamela Fisher

**Credit Suisse**
Della Sabessar

**Cushman & Wakefield**
Nadine Augusta

**EY**
Karyn Twaronite
Michele Geist
Rachel Maryles

**Intel Corporation**
Dawn Jones
Stephanie Crook

**Johnson & Johnson**
Wanda Bryant Hope
Sharon Fronabarger

**L'Oréal USA**
Angela Guy
Soniya Sheth

**Morgan Stanley**
Susan Reid

## Methodology

The primary sources of data for this research report consisted of a survey distributed across each of our eight markets; virtual focus groups; *Insights In-Depth®* sessions (a proprietary web-based tool used to conduct voice-facilitated virtual focus groups); and one-on-one interviews. This report presents findings of our study, incorporating a mixed analysis of quantitative and qualitative methods.

Through our qualitative methods, we reached more than 100 professionals, experts, and practitioners across our eight markets. Primary sources of data collection for the qualitative component of the study included semi-structured expert interviews combined with focus group sessions among employees from the sponsor companies. For the quantitative components of the study, an initial literature review informed the development of our survey instrument. Our survey sample consisted of 5,481 respondents who were at least 21 years old and currently employed full time in professional occupations. Of our respondents, 51% identify as women and 48% identify as men, while 1% identify as nonbinary. Data collection took place from January to February of 2023. The survey was conducted by Momentive under the auspices of Coqual, a nonprofit research organization. Momentive was responsible for the data collection and creation of weighting variables, while Coqual conducted the analysis. Unless otherwise stated, all reported differences between groups within country are significant at the .05 level.

Please refer to the full report for more detailed information on our sample, methodology, and limitations.