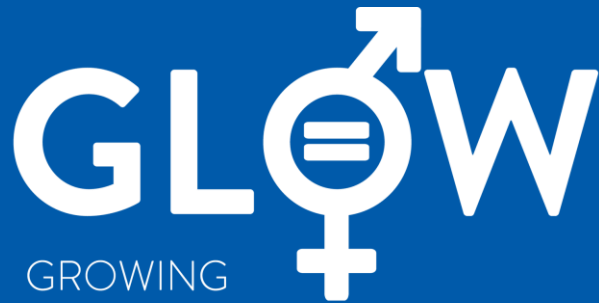




REIMAGINING SOCIAL CHANGE



GROWING
LIVELIHOOD OPPORTUNITIES
FOR WOMEN

Roadmap to gender equity for hyperlocal delivery companies

May, 2023

Glossary of terms (1/2)

- **Delivery agent (DA):** Professionals working to pick up and deliver packages to end consumers
- **Flexi-staffing:** Provision of temporary and trained semi-skilled employees (e.g., sales) to large companies
- **Growing Livelihood Opportunities for Women (GLOW):** Program that aims to increase women's employment, participation, and fair treatment
- **High potential industries:** Industries that have the potential to create a) large number of jobs, b) leverage women's capabilities, and c) align with women's employment needs. Home healthcare, last mile delivery and flexi-staffing have been identified as high potential industries
- **Household (HH):** Group of persons who normally live together and take their meals from a common kitchen unless the exigencies of work prevent any of them from doing so¹
- **Household with low-income:** Households belonging to socioeconomic classes A3 or below under the New Consumer Classification System (NCCS). These households have an average monthly household income of INR 18,000 (USD 240) and below
- **Job:** Activity performed in exchange for income through wages
- **Last mile delivery (LMD):** Final leg of a delivery where the parcel is delivered to the end-consumer
- **Labour force participation rate (LFPR)²:** Percentage of 15-59 year-olds that are a) employed, or b) are unemployed but seeking work, or c) have expressed willingness to work
- **Logistics:** Transport and storage of the parcel from the seller to the end-consumer. Roles in the logistics industry include delivery agent, warehouse packer and sorter etc.

1. Ministry of Home Affairs: [Census terms](#) | 2- PLFS 2017-18; While PLFS 2017-18 defines WPR across all age-groups, we have referred to this as WPR for 15-59 year olds only

Glossary of terms (2/2)

- **New Consumer Classification System (NCCS):** Method of classifying consumers by their propensity to spend using two variables – education of the chief wage earner and the number of consumer durables owned by the household from a predefined list
- **National Family Health Survey (NFHS):** Large-scale, multi-round survey conducted in a representative sample of households throughout India to provide demographic and health database
- **Partners:** Companies collaborating with GLOW to increase women’s recruitment and retention
- **Period Labour Force Survey (PLFS):** Quarterly and annual surveys conducted by Ministry of Statistics and Programme Implementation (MOSPI) for measurement of key indicators pertaining to employment (e.g., labour force participation) by demographic variables (e.g., urban vs, rural, gender)
- **Self-employed:** A person who a) operates own farm or non-farm enterprise, or b) is engaged independently in a profession or trade, or c) is working in their household/family-run enterprise
- **Unemployment rate (UR):** $(LFPR - WPR) / LFPR$
- **Urban:** A settlement with at least 100,000 inhabitants with density of 400 people per sq. km or more, and at least 75% of male working population engaged in non-farm activities¹
- **Women:** Unless explicitly mentioned, this refers to women aged 15 and 59 years from households with low income² in urban³ India
- **Worker population ratio (WPR)⁴:** Percentage of 15-59 year olds that are employed

1. Defined as settlements of at least 5,000 inhabitants with density of 400 people per sq. km or more, and at least 75% of male working population engaged in non-farm activities, by Ministry of Home Affairs | 2. Households belonging to A3 to E3 NCCS categories | 3. Population of more than 100,000 based on RBIs definition of urban centers | 4. Source: PLFS 2017-18; While PLFS 2017-18 defines WPR across all age-groups, we have referred to this as WPR for 15-59 year olds only

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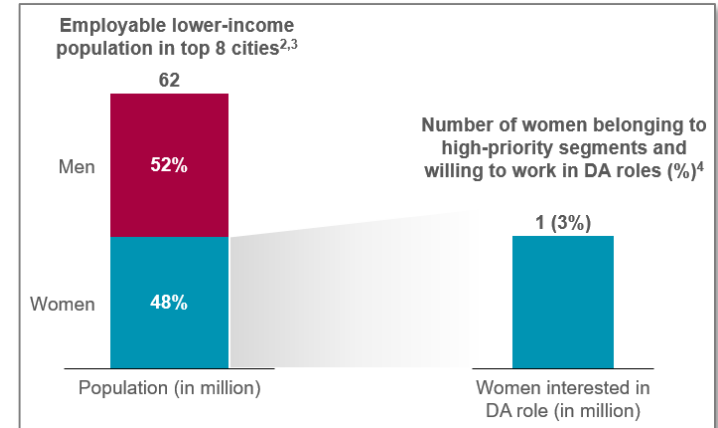
3 Annexure

Hyperlocal delivery companies can get 3 benefits from a gender-diverse workforce¹

1 Access additional talent pool

“We are facing talent shortages in multiple locations including Bangalore, Hyderabad, and Mumbai”

– **Chief People Officer, Delivery company**



2 Attract impact-focused investors

“Our investors have mandated us to incorporate ESG at the core of our operations. So, we are looking to increase women DAs to 10% of our workforce”

– **Chief Strategy Officer, Delivery Company**

“I regularly discuss gender diversity with my logistics investee companies”

– **Investor**

3 Build a positive brand image

“When customers see woman DAs, they post on social media, which is great publicity for us”

– **Program Manager, Delivery company**

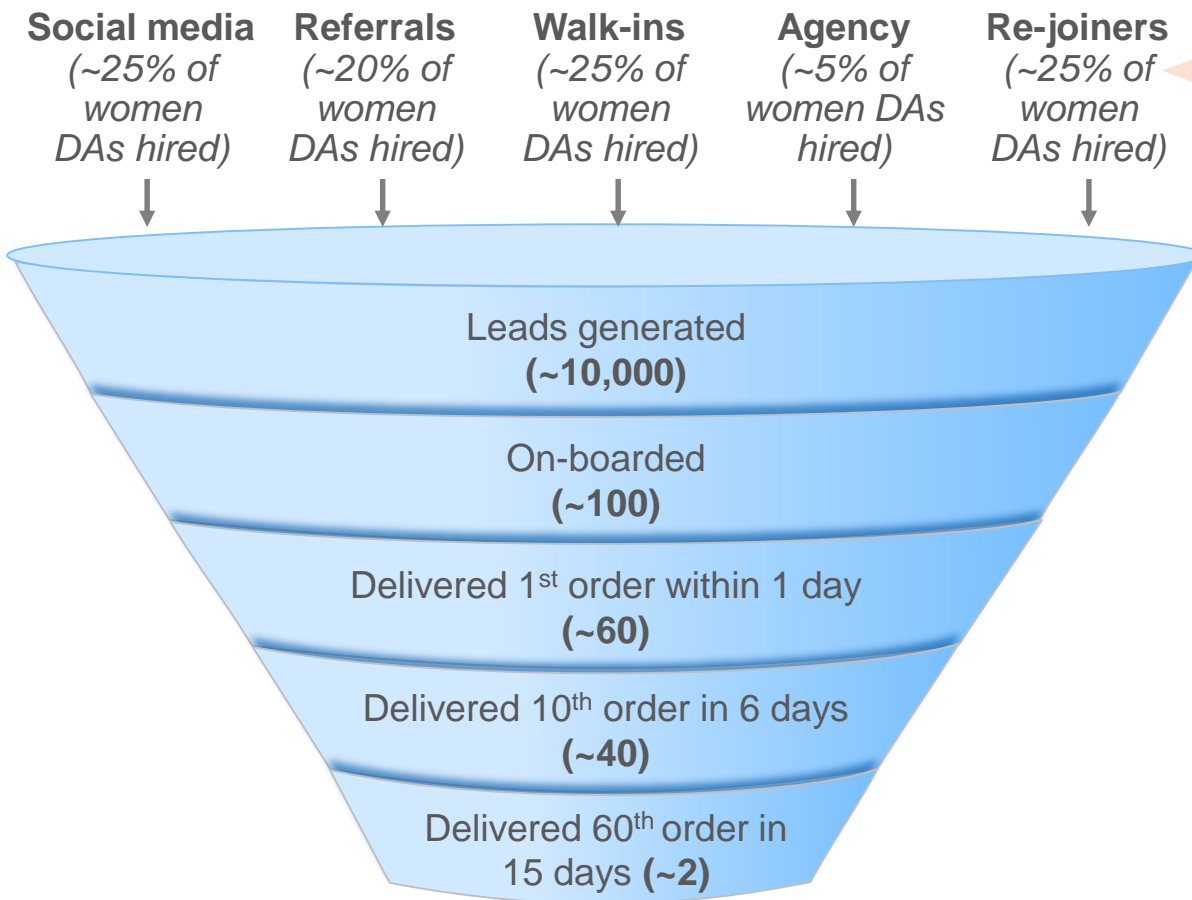
Are you willing to start the journey to improve gender diversity?

1. Based on interviews with ~10 delivery companies and 1 investment firm; 2. Top 8 cities: Mumbai, Delhi, Kolkata, Pune, Chennai, Hyderabad, Ahmadabad, Bangalore; 3. World Bank, PLFS report, Nielson data, FSG estimates; 4. FSG primary research with ~6,600 urban Indian women

However, companies find it expensive to hire women and difficult to retain them

ILLUSTRATIVE

Typical recruitment funnel for women delivery agents¹



Only ~1% of total leads generated are women

Cost per woman¹

~INR 1
~INR 100
~INR 170
~INR 250
~INR 5,000

- Only 1% of female leads generated are on-boarded as delivery agents (DAs)
- Companies are able to retain only 60% women DAs after on-boarding and only 2% after 15 days

1. Based on interviews with hyperlocal delivery companies

Companies are unable to build a gender diverse workforce because of challenges within and outside the company¹



Hiring

1 Companies lack the skills to target and convince women

- 2 Only ~10% urban women are willing to do the role
- 3 Job portals have a limited pool of women
- 4 Families do not give permission to women for this role
- 5 Families do not invest in assets for women
- 6 Women are not taught driving
- 7 Women lack access to key documents (e.g., PAN, driving license)

Retention

- 8 Onboarding material does not provide adequate information about the job (e.g. earnings, what to do on Day 1)
- 9 Companies set unrealistic earning expectations
- 10 Onboarding material does not address key concerns of women
- 11 Companies lack effective mechanisms to resolve issues of women

12 Lack of public washrooms

 Can be addressed by the company

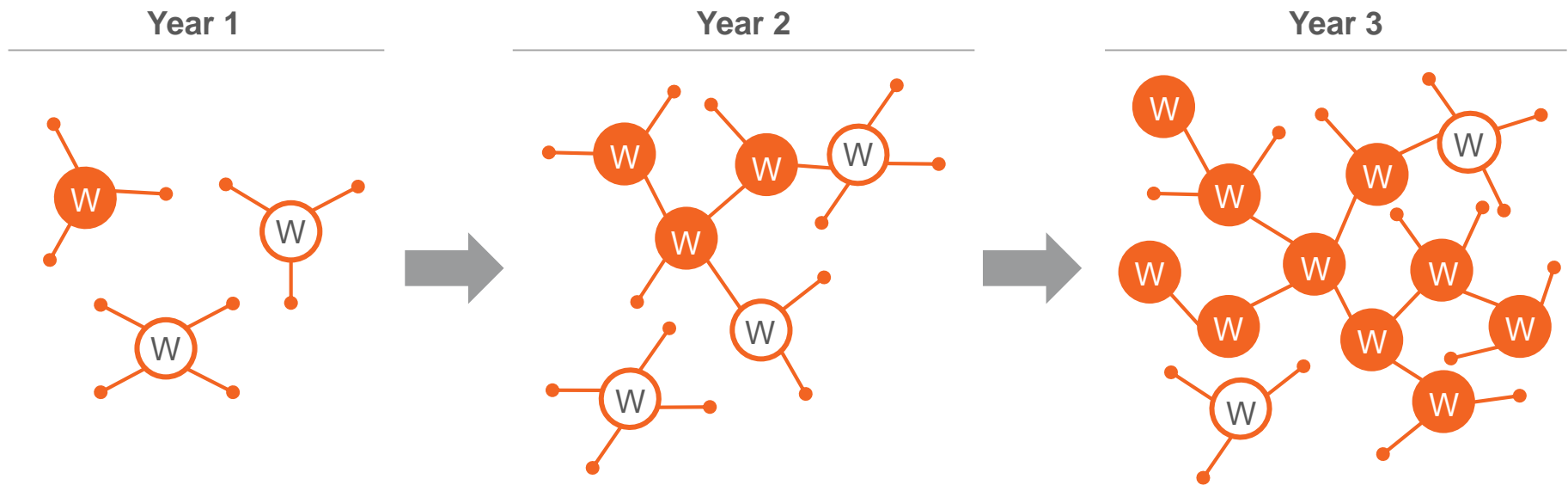
1. Based on interviews with ~10 delivery companies

GLOW has developed 6 solutions that can help companies hire and retain women cost-effectively...

Challenge	Solution	Estimated cost	Estimated benefit
1 Companies lack the skills to target and convince women	A Make hiring collateral gender equitable	~INR 5 lakhs to develop collateral	~5% increase in lead conversion ¹
	B Develop new tele-caller script to convince women	~INR 250 per new woman DA	~50% increase in lead conversion ²
	C Modify referral bonus to incentivize initial order completion	INR 500 per referred woman who delivers 10 orders	~5% increase in referrals for female candidates
8 Onboarding material does not provide adequate information about job	D Provide initial handholding by team leaders ³	~INR 80 per new woman DA	~20% increase in first order retention
10 Onboarding material does not address key concerns of women	E Develop a 5-minute video addressing concerns of women DAs	~INR 10 lakhs to develop collateral	~5% increase in first order retention
11 Companies lack effective mechanisms to address women's concerns	F Assign women DA mentors and pay them INR 10 per order for 100 deliveries by mentee	~INR 140 per new woman DA	~10% increase in 15-day retention

1. Assuming conversion rate improves from ~1% to ~1.05%; 2. Assuming conversion rate improves from ~1% to ~1.5%; 3. The intervention can be discontinued once the women workforce in delivery roles scales

...and gradually scale women workforce



Women DAs who refer women in their network



Women DAs who do not refer women in their network



Women in network of women DAs

Improving retention would help hyperlocal delivery companies scale their women workforce as:

- More women DAs would recommend the role to female friends and family (~62% women look for jobs through personal networks)
- Women DAs would act as role models for other women in their communities
- New women DAs would have a support network of women DAs

Apart from this roadmap, GLOW can provide 4 types of support to achieve your gender diversity goals



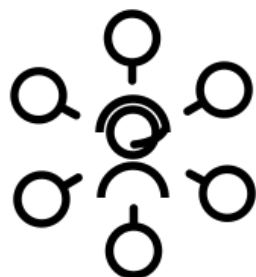
1 **Research**

Share research on women's employment needs (e.g., job search channels, motivation to work)



2 **Market intelligence**

Share industry best practices for hiring and retaining women (e.g., pick up and drop services, handholding for the first 15 days)



3 **Advisory**

Act as thought partner to the leadership to advance company's gender agenda (e.g., set gender targets and KPIs)



4 **Capacity building**

Train and coach ground staff to hire and retain women (e.g., pitch to attract women, gender diversity sensitization trainings)

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FSG Inclusive Markets (IM) aims to **improve opportunities, agency and choice for families with low- income** by working with companies to **serve these families as customers** (and not with non-profits to serve them as beneficiaries)

Through our programs, we **address key barriers that preventing companies from offering products, services, or practices** (e.g., housing, education, employment) that benefit families with low- income

We do this by:

- Talking to thousands of **families to understand their needs, aspirations and challenges**
- Talking to hundreds of **managers to understand the operational barriers** and to tens of **CXOs to understand the business, ecosystem, and regulatory barriers**
- Signing up and partnering with companies to **co-create interventions** to address barriers, pilot solutions, and profitably scale the much-needed product, service, or practice
- **Publishing and disseminating public goods** (e.g., women's employment aspirations, companies' barriers, best practices) to make it less risky for the industry to provide this product or service
- **Addressing ecosystem barriers** (e.g., making policy suggestions) to make the market more conducive

GLOW's Vision, Mission and Goals



Vision

- **Improve gender equity in India** by economically empowering women



Mission

- **Sustainably place 1m+ women** from households with low-income¹ in jobs **by shifting companies' mindset and practices**



Goals

In 6 years:

- **Place 100,000 women in jobs** across 2-3 high-growth industries
- **Increase women's workforce participation by 6%** across partners²
- **Make it easier and less risky for these industries to increase women's workforce participation** by publishing best practices and demonstrating the business benefits of employing women

1 – Households belonging to socioeconomic classes A3 or below under the New Consumer Classification System (NCCS). These households have an average monthly household income of INR 18,000 (USD 240) and below | 2 – Companies that are collaborating with GLOW to increase women's recruitment, retention, and promotion

Most women in urban India come from low-income and low-education backgrounds



- **83%** of women in urban India come from households with low-income¹
- **85%** of women from households with low-income have not gone to college
- **>50%** of women from households with low-income have not completed Grade 10

To meaningfully increase women's workforce participation, women from low-income and low-education backgrounds need to be employed

1. Households belonging to socioeconomic classes A3 or below under the New Consumer Classification System (NCCS). These households have an average monthly household income of INR 18,000 (USD 240) and below

Family and societies restrict women from taking up employment opportunities

Primary insight

Supporting insights

1 84% of women need to secure permission to work

- A** 84% of women need to secure permission prior to deciding to work
- B** For 1 in 3 women that are neither working nor seeking a job, lack of permission or precedence is the primary reason for not working

2 Family attitudes are progressive in theory, not in practice

- A** While >90% decision makers believe it is important for women in society to work and that it brings pride to the family...
- B** ...1 in 4 prefer if women in their households did not work at all
- C** 69% of key decision makers firmly believe that the main role of a woman is to take care of the home and children

3 Most families prefer entrepreneurship but, most women prefer jobs

- A** 3 in 4 decision makers in the family prefer that women work from home or start a business so they can also manage house work
- B** 2 of 3 aspiring-to-work women prefer jobs over entrepreneurship
- C** 93% women want fixed salaries over daily wages

4 11% of women are willing to use paid day care services

- A** Both women and key decision makers believe child care is primarily the mother's and families responsibility
- B** 51% of women are aware of paid day care services, 11% are willing to use services and only 1% have used the services
- C** Of the 15% women that cited lack of affordability as a reason for not using paid day-care services, ~50% are willing to use Anganwadi services¹

Note: Unless explicitly mentioned, 'women' in this document refers to women aged 15 and 59 years from households with low income (i.e. households having an average monthly household income of INR 18,000 or USD 240 and below) in urban India. Data source: FSG's interviews with 6,600 women and 550 key decision makers from urban households with low-income in 16 cities across 14 states in India. 1. Anganwadis are government-run child care and development centers set up under the Integrated Child Development Services Scheme of the Central Government of India. Provision of Anganwadi service is free.

Despite this, women in urban India want to work in jobs and are confident in their abilities to do these jobs

Primary insight

5

1 in 2 women in urban India want to work in jobs

Supporting insights

- A** Women in urban India want to be in jobs; 1 in 2 women are either working in a job or seeking one
- B** 88% of women believe a mother could work outside the house
- C** Women with children >6 years and those that know other working women are among the most likely to be in a job
- D** 72% of women strongly believe that they should not prioritize children and household over thinking about working

6

Women want to work to be self reliant and are confident in their abilities

- A** 64% of women strongly agree that for a woman to be self-reliant it is important to work
- B** Supporting own and family expenses is the key reason for >90% women to start seeking jobs
- C** 87% of women are optimistic about their ability to pick up new skills

7

Some women are willing to work in non-traditional and male dominated workplaces (e.g., warehouses)

- A** Some segments of women are more amenable to be in a job (e.g., women with low education levels, strong working culture and child >6 years are most willing to work in warehouses)
- B** 70% believe they would be comfortable talking to strangers (including men)
- C** 1 in 2 women are comfortable working in an environment that is 90% male

Note: Unless explicitly mentioned, 'women' in this document refers to women aged 15 and 59 years from households with low income (i.e. households having an average monthly household income of INR 18,000 or USD 240 and below) in urban India. Data source: FSG's interviews with 6,600 women and 550 key decision makers from urban households with low-income in 16 cities across 14 states in India.

~1m women can be brought into the workforce by increasing women's participation in high-growth industries from 5% to 10%

Last-mile delivery



Hyperlocal delivery agent⁴



Last-mile delivery agent

Warehousing



Warehouse packer



Warehouse sorter⁵

Flexi-staffing



Retail sales associate⁶

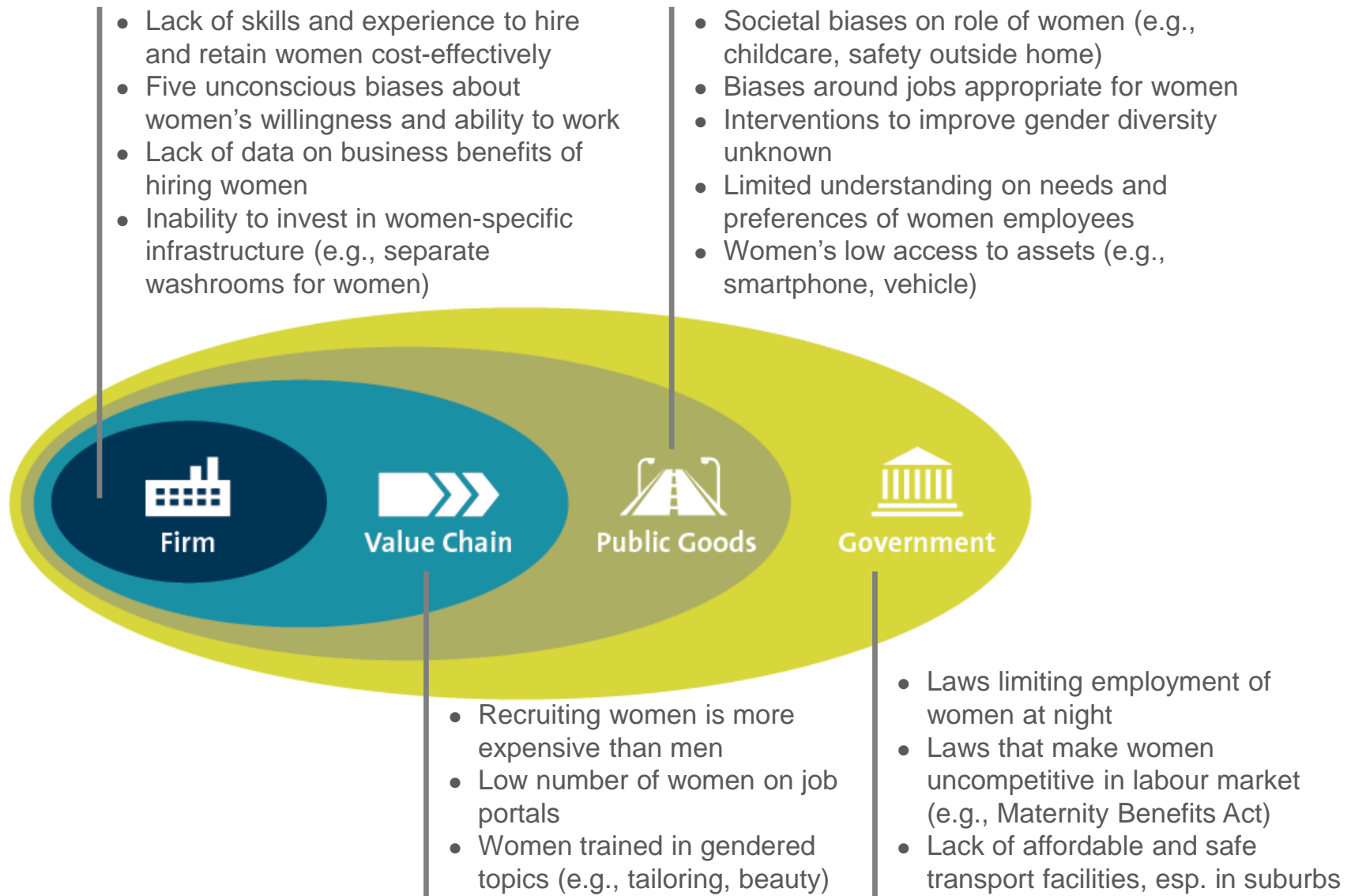


Tele calling agent⁷
and more...

- Last-mile delivery, warehousing and flexi-staffing industries are growing rapidly and employed ~1.2 million workers in 2020, and less than 8% were women¹
- Many jobs (e.g., delivery agent, warehouse packer) in these industries need basic education (i.e., 10th pass) and on-the-job training²
- Increasing women's participation from 8% to 24% by 2030, can add 1m+ additional women in jobs³

1 – PLFS 2019-20, Indian Staffing Federation Report 2018 and 2021 | 2 – Based on FSG's interviews with Logistics and Flexi-staffing companies | 3 – Assuming worker CAGR of 4% for Logistics and 8% for Flexi-staffing industry, Logistics and Flexi-staffing industries could employ ~15 million workers by 2030 | 4-MONEY SHARMA / AFP via Getty Images | 5- Metamorworks/Shutterstock.com | 6- [IndianFace](https://www.indianface.com)/Shutterstock.com | 7-moodboard/Brand X Pictures via Getty Images

Barriers preventing companies from increasing women's workforce participation



Most of these barriers cannot be addressed effectively by firms themselves

Firms will not address barriers because...

- **Insufficient risk-adjusted return** (e.g., lack of data on business benefits of hiring women, cost of research to understand women's needs and preferences when impact on gender diversity is unclear, cost of spending team's time when there is low confidence in returns)
- **Availability of lower cost alternatives** reduces willingness to try new strategies (e.g., cost of hiring women for delivery agent (DA) roles is 3x that for men)
- **Free rider problem** creates risks to investments in gender equity (e.g., risk of competitors poaching women from firms that invest in finding and recruiting women)
- **Competitive instinct** reduces willingness to co-operate to solve common issues (e.g., low willingness to cooperate to convince families that field roles are appropriate for women)

Firms cannot address barriers because...

- **Lack of capacity and capability** limit ability to adopt gender-equitable practices (GEPs) (e.g., designing GEPs, sequencing GEPs into a low-risk and low-cost roadmap, inability to invest in infrastructure)
- **Lack of networks** constrains ability to solve ecosystem issues (e.g., with impact investors, skilling organizations, clients willing to pay more for women)
- **Lack of neutrality** limits capability to influence stakeholders (e.g., government is less likely to change policy if firm petitions vs. if a neutral party like FSG explains the need to allow women in night shifts)
- **Biases** make it difficult to hire female talent (e.g., Societal biases on role of women or on jobs appropriate for women, five unconscious biases within firms about women's willingness and ability to work)

As an industry facilitator, GLOW is addressing issues that prevent firms from solving barriers themselves

- Build a nuanced understanding of the problem by interviewing all key stakeholders (e.g., research with 6,600+ women, managers within firm)
- Improve risk-adjusted return for research by developing low-cost gender-equitable practices and disseminating to firms
- Make gender equity a priority for firm leadership and convince companies to embark on this journey (e.g., by sharing business benefits of hiring women, by offering support)
- Build and disseminate public goods (e.g., publishing gender-equity roadmap on website)
- Advocate to government on behalf of industry (e.g., reducing cost of employing women in night shifts, parental benefits as opposed to maternity benefits)

Till date, GLOW has signed-up 17 partners and these partners have added 3,600+ women in jobs through pilots

17 partners signed-up

Together, these partners currently employ ~600,000 people and less than 1% are women



And more...

Multiple pilots in-progress

- Use local influencers as mobilizers (e.g., *Mahila Mandal* president)
- Incentivize recruiters to hire women
- Create a pitch that is attractive for women
- Assign experienced female mentors to new female employees
- Share case studies of women doing work considered difficult for them
- ... and more

Impact seen in ~2 years

- **~35 GEP (Gender equitable practices) piloted**
- **>100,000 additional jobs for women by logistics and FS industries**
- **>3,600 additional jobs** for women by partners
- Gender equitable policies and practices implemented. For example:
 - Recruitment channels optimized
 - Recruiter capability improved through training
 - ... and more

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Poster to convince women

Hiring female biker for Company



Photo of a woman

Earn approximately INR 12,000 per month (earn ~INR 40 per order)

Part-time working options available

Choose your work timings

Deliver light food parcels

Get weekly and monthly incentives

Benefits for women

Logo



+91 XXXXX XXXXX

Clear call to action

FAQs for family members

Frequently asked questions

- I have only seen men do this job. How will a woman do it?**
 - Today, many women are working as delivery agents. We already have xx women DAs working with us and they are able to do this job very well. Some women DAs have been working with us for 1-2 years and they say they like the high earning potential, weekly payouts, and the flexible working hours
- This job will be tiring and physically strenuous for my daughter / wife**
 - She will deliver light weight food parcels
 - We also provide part-time options so that she may work for only 4-5 hours a day
- It's unsafe to visit strangers' homes / I do not want my wife to go door to door**
 - We value our delivery agents and have security mechanisms in place:
 - We track live location of DAs so that we can provide help if they need
 - We will also provide her orders only in safe zones
 - We have a sexual harassment committee for redressal of any incident
 - (If applicable) We also provide women the option to cancel unsafe orders, SOS button, and pepper sprays
- My daughter / wife cannot do this job as she does not know English**
 - She only needs to know very basic English so that she can read addresses on parcels. The delivery app is available in the local language as well
- My daughter / wife does not own a Scooty**
 - If you do not have a two-wheeler, you can rent it.
 - Our delivery agents earn enough money over a few months to buy their own Scooty
- The job has unsuitable timings for a woman**
 - The delivery agent can choose her own work timings
 - If needed, we can also provide part-time working options so that she to work for only 4-5 hours a day

A Make hiring collateral gender-equitable (2/2)

Illustrative job advertisement

Delivery Girl

Company name

Koramangala 250 Openings

12th Pass Freshers can apply

Apply Now Share

Make headline women specific

Job Details

Education: 8th pass or above

Experience: Freshers can apply

English Level: No English

Gender: Female only

Mention the minimum eligibility criteria required

Change gender requirements to include women

Job Description

Responsibilities of candidates include:

- Deliver packages to customers in a safe and timely manner
- Utilize navigation apps to find the most optimal route
- Interact with clients in a professional manner and accept payments, if required
- Ensure that vehicles have sufficient fuel and are always ready for use

Benefits available to women:

- Flexible working hours
- Light parcels
- Choose to work part-time (4-hours)

Include benefits available to women

Estimated costs

- ~INR 1 lakh one-time cost¹ for design of new collateral

Estimated benefits

- ~5% increase in lead conversion¹

1. GLOW assumption

Existing pitch

“Hi, I am calling from company A. We are hiring delivery agents. Would you be interested in applying?”



Proposed pitch

*“Hi, I am calling from company A. We are hiring **women** delivery agents. On average, our delivery agents deliver ~10 orders per day, and **earn ~INR 12,000 per month**. We have also introduced several **facilities for women** such as tie-ups with petrol pumps to use washrooms, period leaves, and SOS button for emergencies. We also offer **part-time working options** for our women DAs. Would you be interested in applying?”*



Concerns of women

- I do not have a driving license / bike

- I do not have time to do this job

- My family will not allow me to do this job / I do not think I can do this job
-

Sample responses

- We have a tie up with an organization XYZ which can help provide you **electric bicycles on rent**

- We have **part-time working options** for DAs who are already working / studying

- We employ **~xx women delivery agents**
 - We really value our women delivery agents and have introduced many **facilities to support** them. (e.g., part-time working options)
 - Our women delivery agents are very satisfied. If you send me a “Hi” on this number, I can share a **video of some of our women DAs**
-

Estimated costs

- ~INR 4 per call assuming 2 minutes extra per call¹
- ~INR 250 per new DA²

Estimated benefits

- Lead conversion increases from ~1% to ~1.5%⁴

1. Assuming ~INR 20,000 per month average salary of tele-callers, tele-callers work for 5 days per week and 8 hours per day; 2. Assuming a 1.5% conversion rate; 3. GLOW assumption

C

Modify referral bonus structure to incentivize initial order completion

Referral bonus	Existing structure ¹	Proposed structure
Amount	INR 2,500	INR 2,500
Payout structure	<ul style="list-style-type: none"> • INR 500 bonus if the referred DA delivers 60 orders in 30 days • Additional INR 500 bonus if the referred DA delivers 100 orders in 30 days • Additional INR 1,500 bonus if the referred DA delivers 400 orders in 30 days 	<ul style="list-style-type: none"> • INR 500 bonus if the referred DA delivers 10 orders • Additional INR 500 bonus if the referred DA delivers 60 orders • Additional INR 1,500 bonus if the referred DA delivers 400 orders
Payout structure	<ul style="list-style-type: none"> • DA needs to login for the entire shift duration • DA needs to login on the weekends • 	NA

Estimated costs	<ul style="list-style-type: none"> • ~INR 500 per referred woman DA who completes 10 orders 	Estimated benefits	<ul style="list-style-type: none"> • Referrals for female candidates increase by ~5%²
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1. Indicative structures based on interviews with industry players; 2. GLOW assumption

D Provide initial handholding by TLs

	Day 0	Day 1	Day 8
Who should be called	Team leaders call all women DAs right after they are on-boarded	Team leaders call all women DAs on the first day of their job	Every Monday, team leaders call women DAs who joined the previous week but have not earned incentives / have earned less
What should be covered in the call	<ul style="list-style-type: none"> • Ask DA to demonstrate what she will do on the first day of the job and share tips (e.g., suggest high demand locations) • Explain the help option and share 3 example scenarios where it can be used • Share phone number of team leader and female DA mentor 	<p>Check if the woman DA is facing any challenges in delivering orders and troubleshoot:</p> <ul style="list-style-type: none"> • Has she logged in? • How many orders has she been able to deliver? • What challenge is she facing in delivering orders? • If she faces any further issues, she should call the team leader 	<p>Provide tips to the women DA on how to earn incentives in order to maximize earnings (e.g., complete xx hours or deliver xx packages to earn incentive, improve customer ratings)</p>

Estimated costs

- ~INR 80 per new woman DA¹

Estimated benefits

- ~20% increase in first order retention²

1. Assuming ~10 minutes per call; 2. GLOW assumption

E

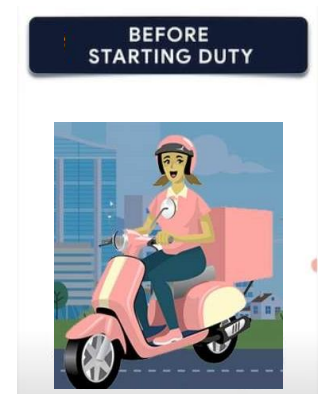
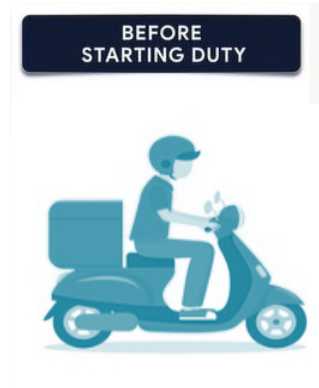
Develop a 5 minute training video to address concerns of women

Add a component to address concerns of women DAs

Address common concerns of women DAs:

- Lack of washrooms
- Physically tiring job
- Safety concerns
- Facilities for women DAs

Show photos of women DAs



Estimated costs

- ~INR 10 lakhs to develop the collateral¹

Estimated benefits

- ~5% increase in first order retention²

1. GLOW assumption

F Assign women DA mentors

Profile of the DA sakhī

- An experienced DA who has been working with the hyperlocal delivery company for at least the past ~6 months

Responsibilities

- Provide mentorship to ~7 new women DAs who are not referred by an existing DA (~80% of women DAs hired)
- Answer queries and guide DAs during non-peak hours
- Create a WhatsApp group with the assigned new WDAs to provide them a forum to raise concerns

Incentive to the DA sakhī

- INR 10 per order delivered by the new women DA for the first 100 orders

Estimated costs

- ~INR 10 per order delivered by a new woman DA who was not referred
- ~INR 140 per new woman DA¹

Estimated benefits

- ~10% increase in 15-day retention²

1. Based on the attrition data received from various industry players, GLOW estimates that a DA mentor will be paid for ~17 orders on average per new WDE; 2. GLOW assumption



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