

# COMMUTER CONNECTIONS 2020 EMPLOYER TELEWORK SURVEY

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## Coronavirus Pandemic Survey Results

Nicholas Ramfos  
Director, Transportation Operations Programs

National Capital Region Transportation Planning Board  
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# Survey Objectives and Methodology

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- Employer telework survey is conducted every three years by Commuter Connections to define the portion of teleworking influenced by assistance provided.
- For FY2020, the survey was expanded to include questions on the Coronavirus Pandemic's influence on Telework.

# Survey Objectives and Methodology (con't)

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- Examined telework changes made by employers during coronavirus pandemic
- Interviewed employers that were in either the Employer Outreach database or federal Employee Transportation Coordinators/Telework coordinator database
- Sent email/postal mail invitations for an Internet-based survey and followed up by telephone.

# Survey Objectives and Methodology (con't)

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## **The questionnaire addressed the following broad topics:**

- Change in worksite operation due to coronavirus pandemic
- Number of employees teleworking at the time of the survey and before the pandemic
- Changes in telework programs or policies in response to the pandemic
- Likelihood to continue telework after the pandemic ends
- Assistance received with telework planning or implementation
- Significant telework issues encountered during the pandemic
- Employee and manager benefits received by teleworking
- Employer characteristics (size, location, major industry)

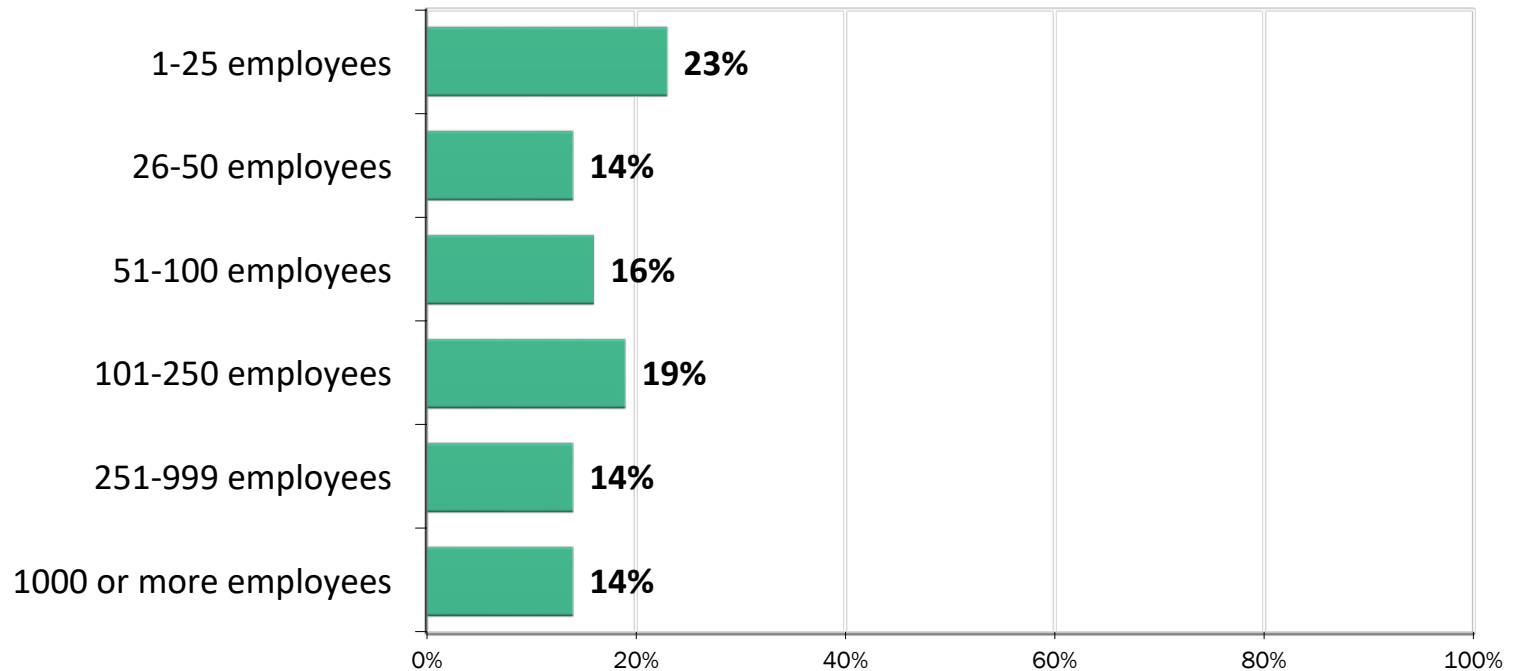
# Survey Objectives and Methodology

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- 4,539 Employers were contacted in May and June 2020 and 180 responded for a 4% response rate.
- Due to office closures, employee furloughs and other impediments to reaching employer representatives to respond to the survey, a survey confidence level was not calculated.
  - Essentially, the survey results can be categorized as a “very large focus group”
- Companion briefing report is also available with in-depth survey response details.

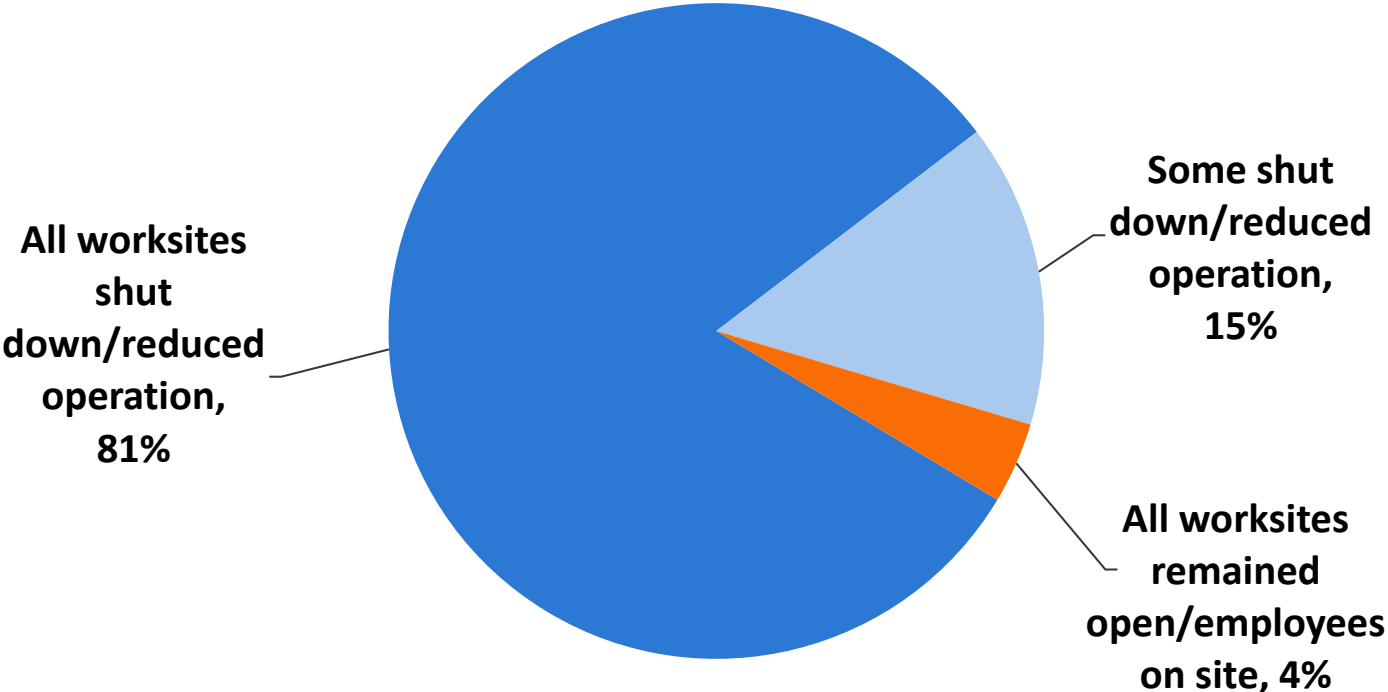
# Employer Profile – Diverse Sample

- Worksite state: **12% DC, 43% MD, 45% VA**
- Employer type: **49% private, 33% NFP, 13% Federal, 5% State/Local government**
  - Industry: Government, medical, trade association, business support, education, real estate/property management, technology, hospitality, legal/professional, banking/finance
  - Size – number of employees in Washington metro region

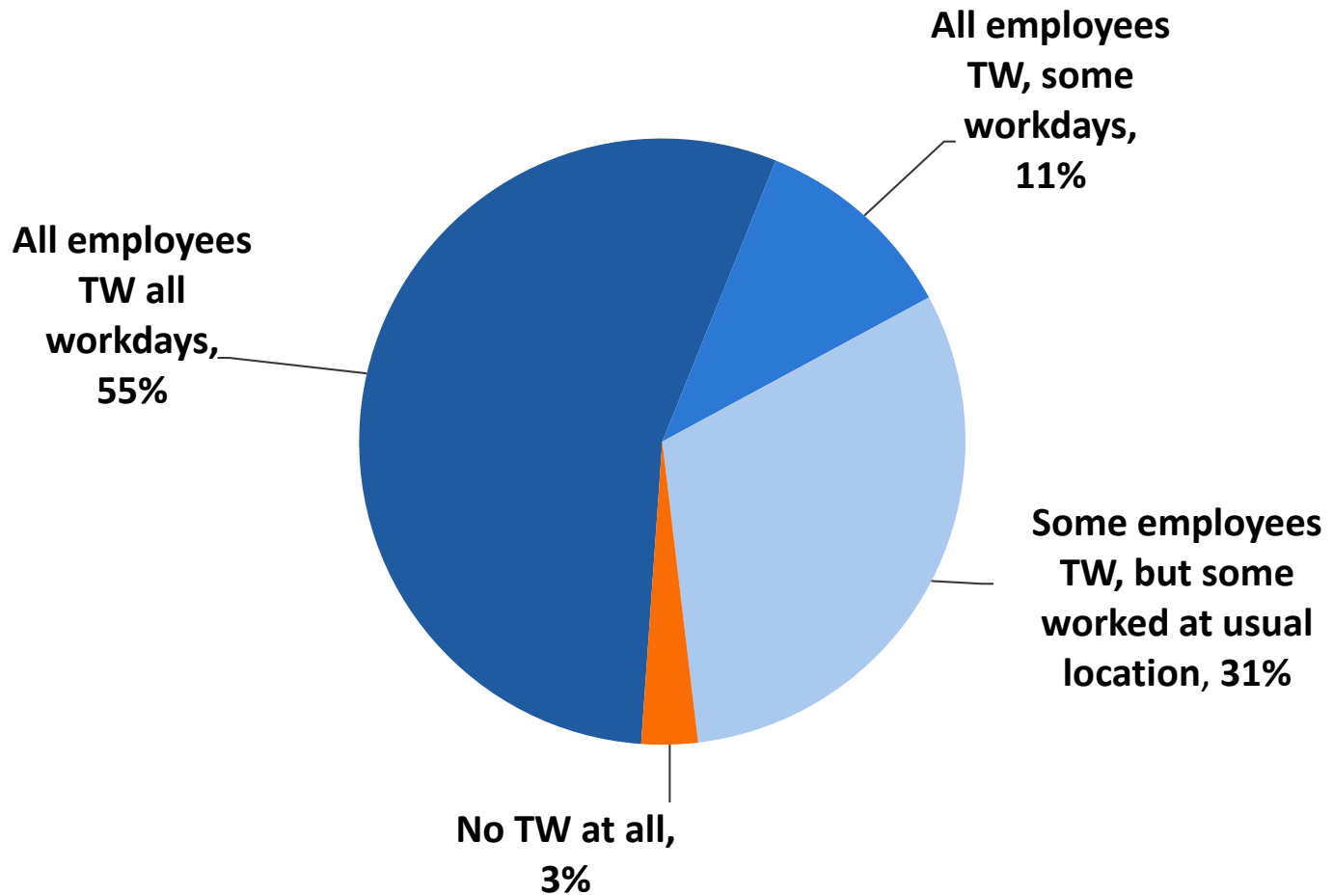


# 96% of Worksites Shut Down or Reduced On-site Operation Either Completely (81%) or Partially (15%) Since Coronavirus Pandemic Began

*At the time of the survey, 95% of sites with reduced operation were still closed/limited on-site operation*



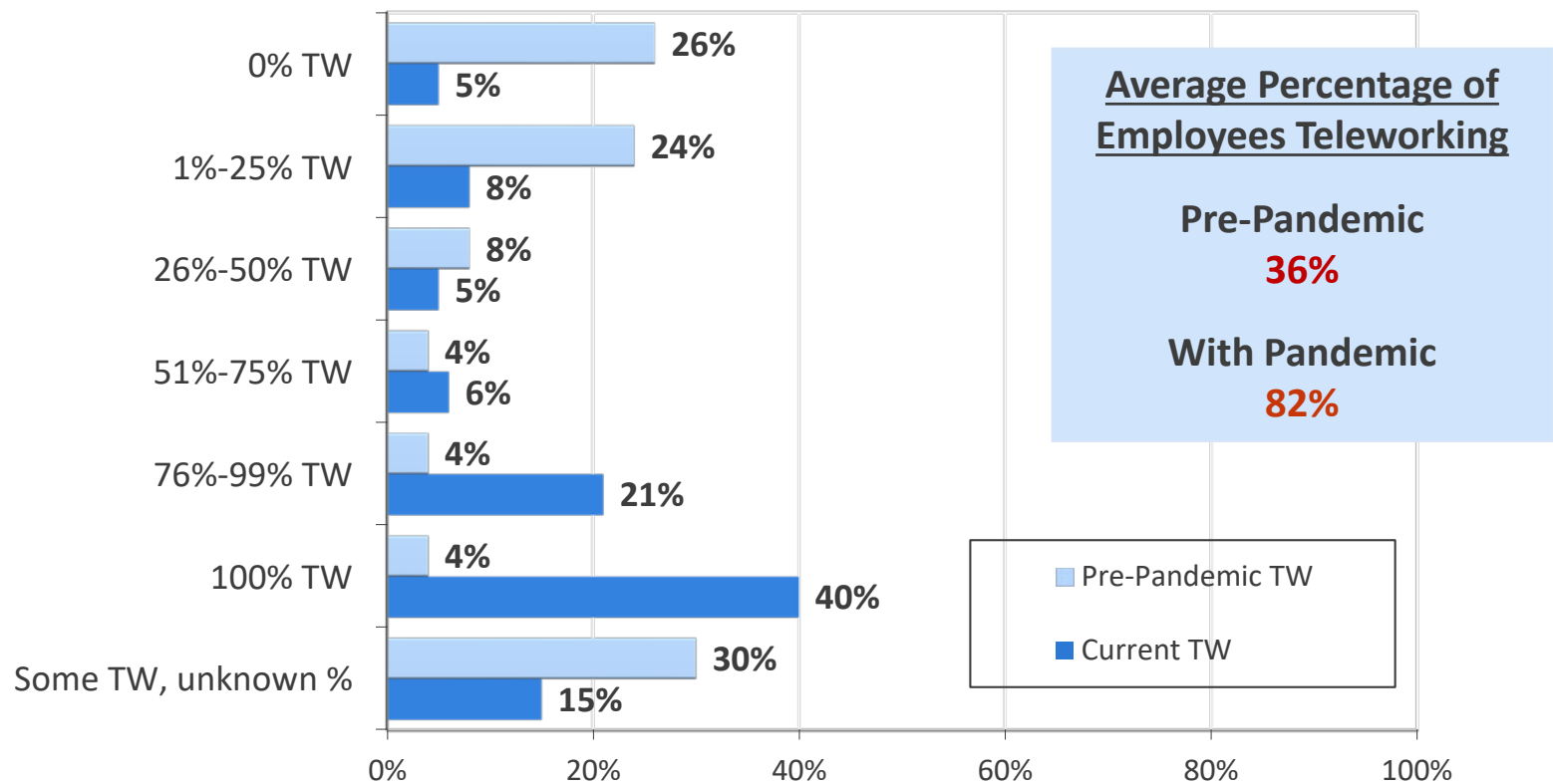
# 97% of Worksites Had At Least Some Telework Since Pandemic Began – For 55%, It was Full-time for All Employees



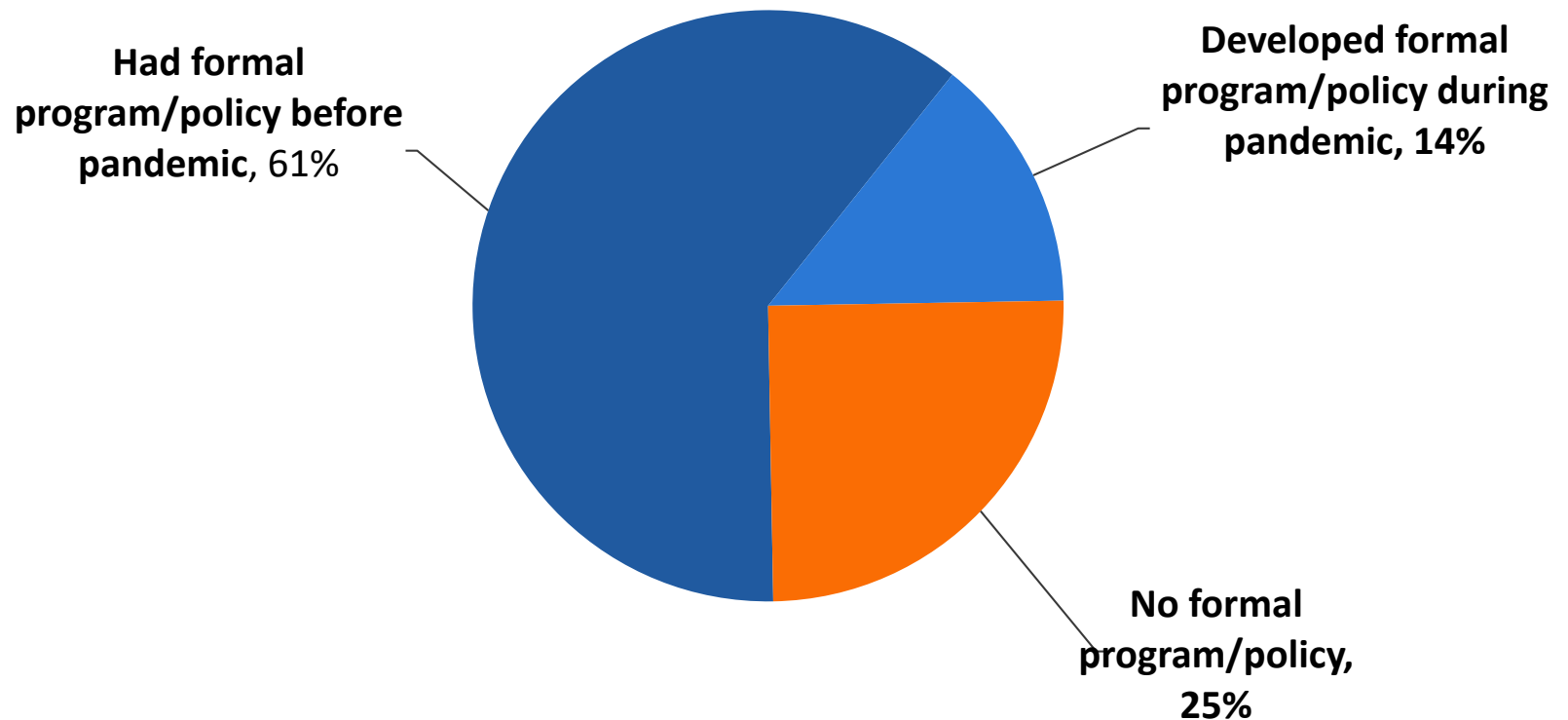


# At the Time of the Survey, 95% of Worksites Had Telework; Telework Was Common Pre-Pandemic Also - 76% Had At Least Some Telework Before

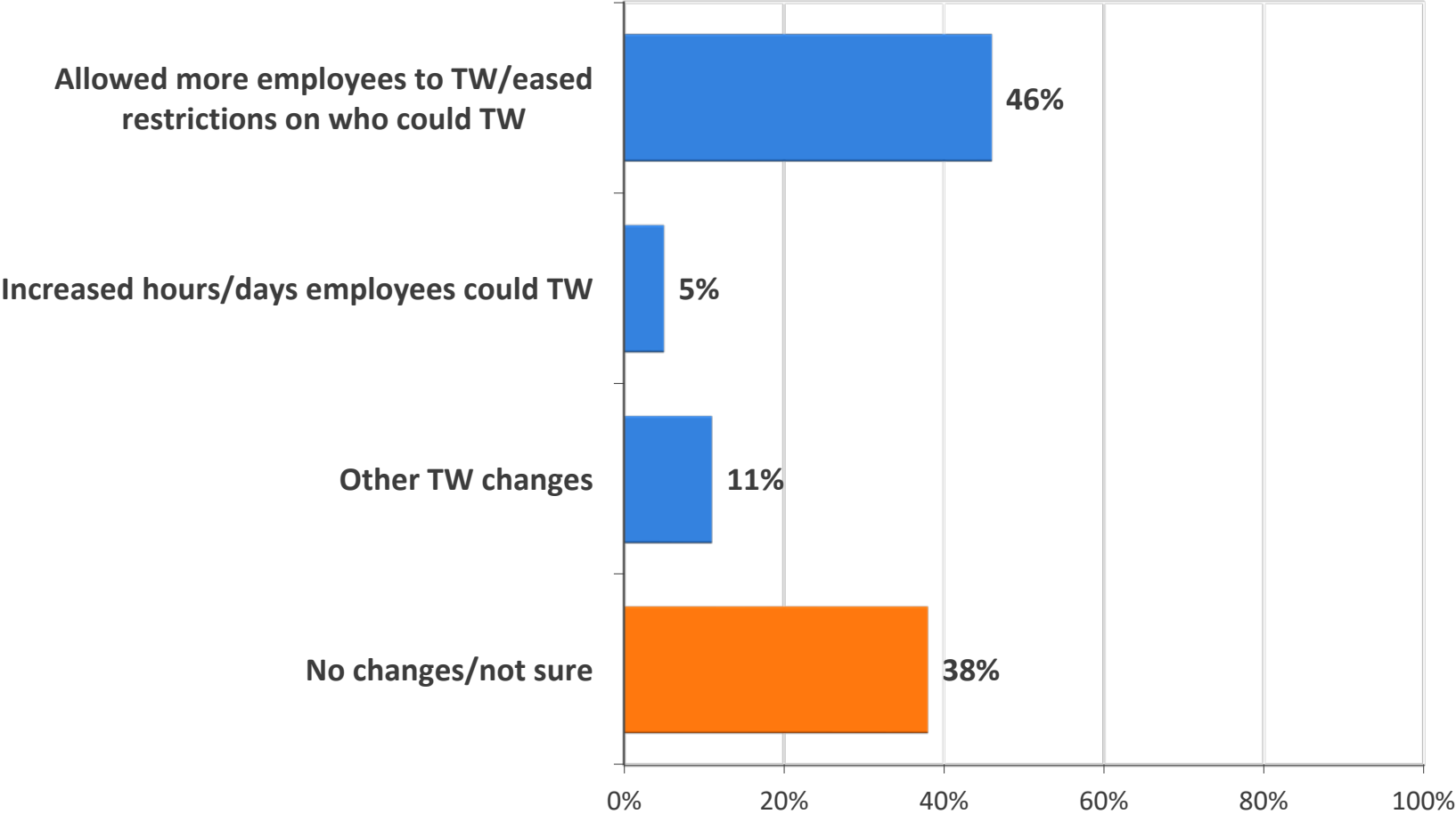
*But during the pandemic, the average share of employees who teleworked grew from 36% to 82% at sites with telework*



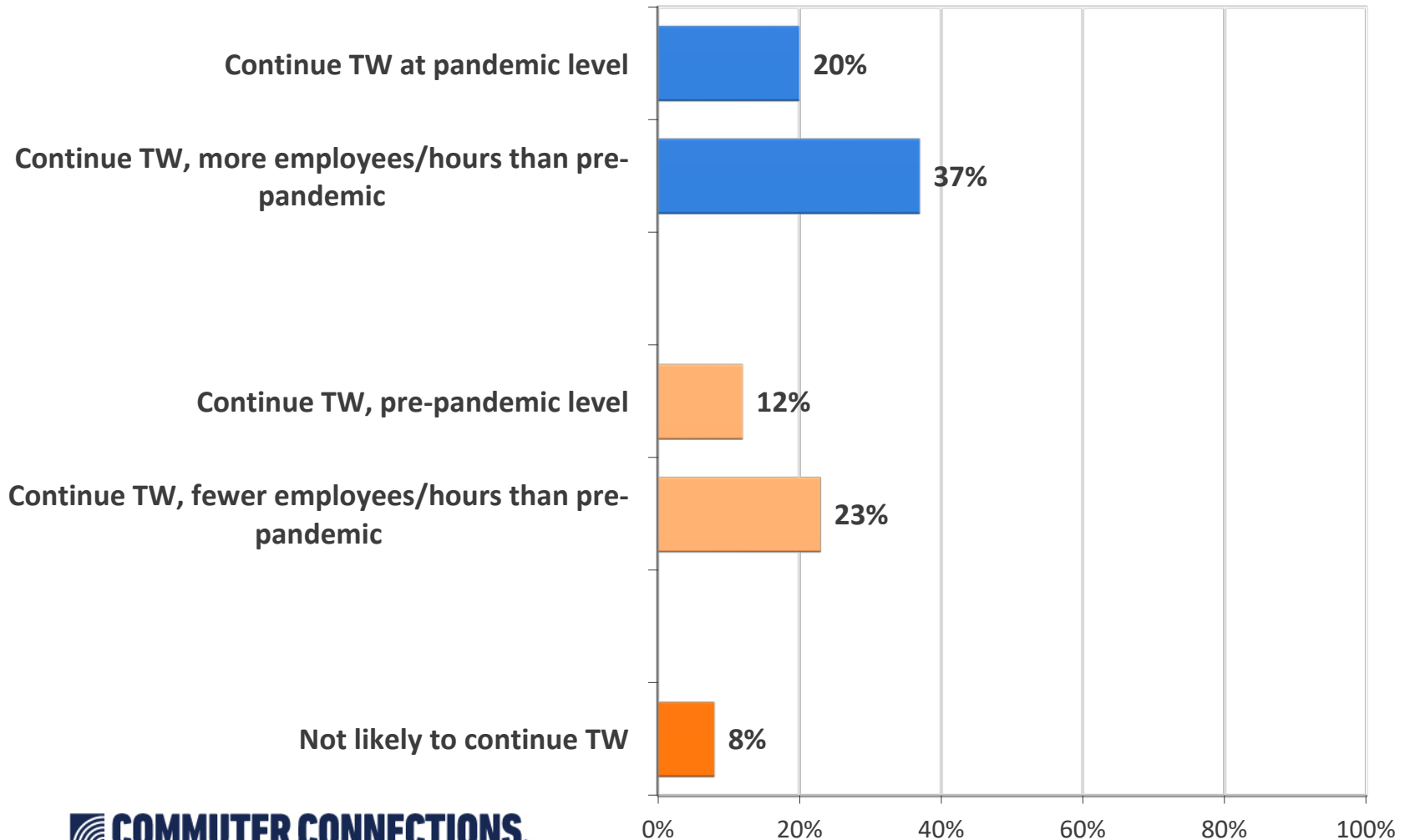
# During the Pandemic, 14% of Worksites Developed a Formal Telework Program/Policy; 61% of Worksites Already Had a Formal Program/Policy before the Pandemic



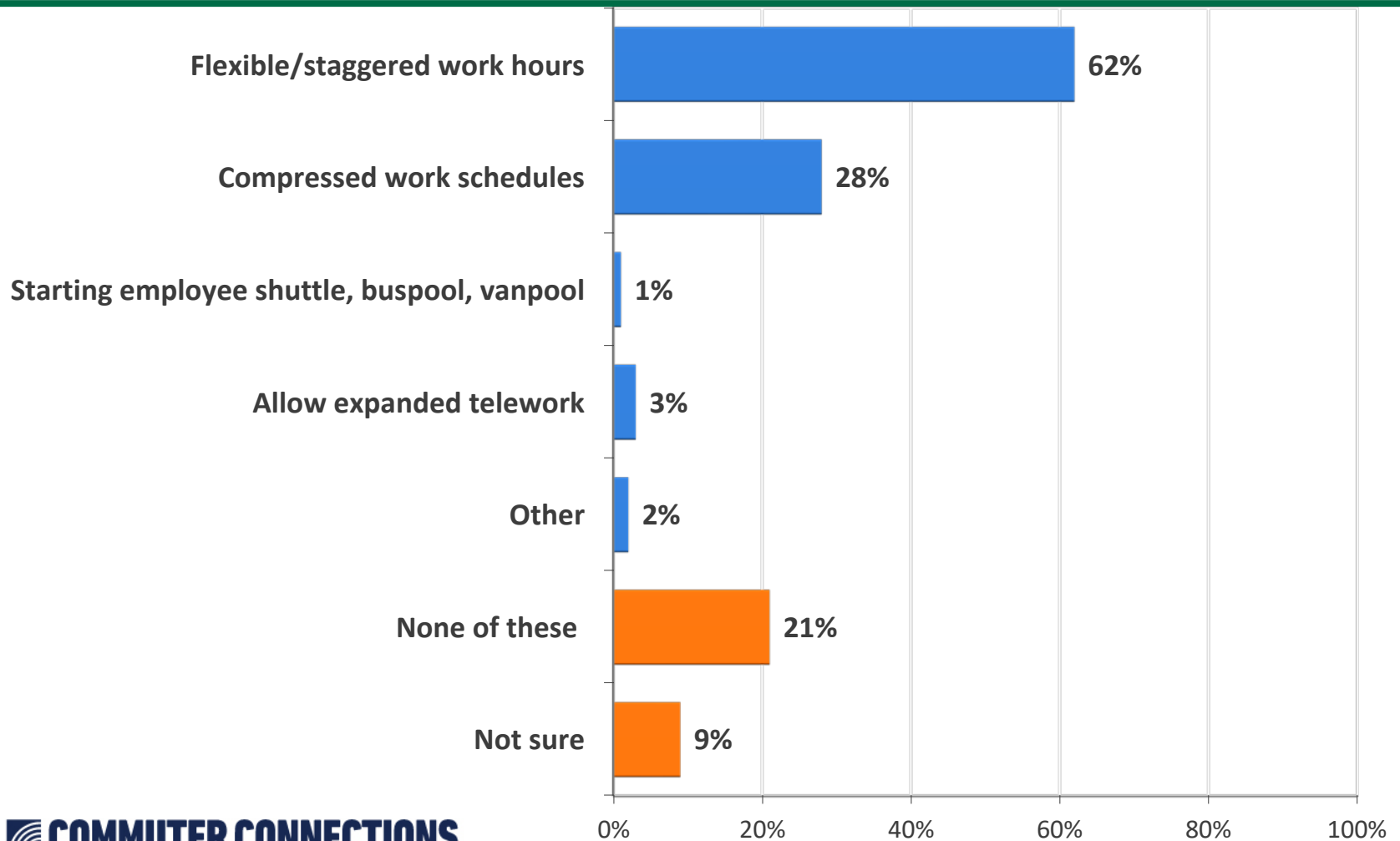
# 62% of Worksites With a Telework Program/Policy Made Changes to Accommodate the Pandemic – Most Made a Change to Expand Telework Eligibility



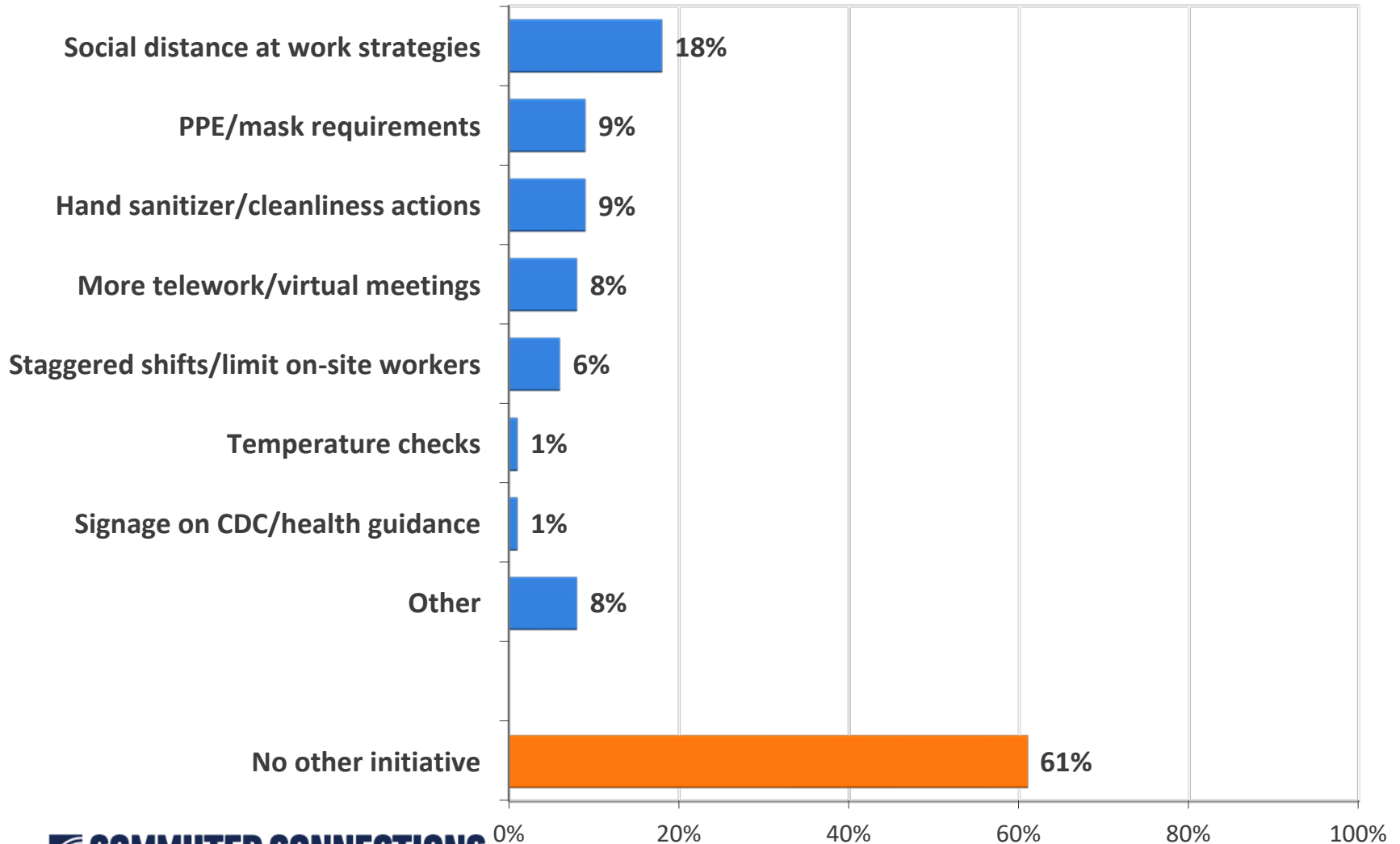
# More than Half of Worksites Anticipate A Post-Pandemic Telework Level that is Higher Than the Pre-Pandemic Level



# Seven in Ten Worksites Have Considered Implementing Work Hours or Commute Strategies After the Stay at Home Restrictions are Lifted to Reduce Future Virus Outbreaks

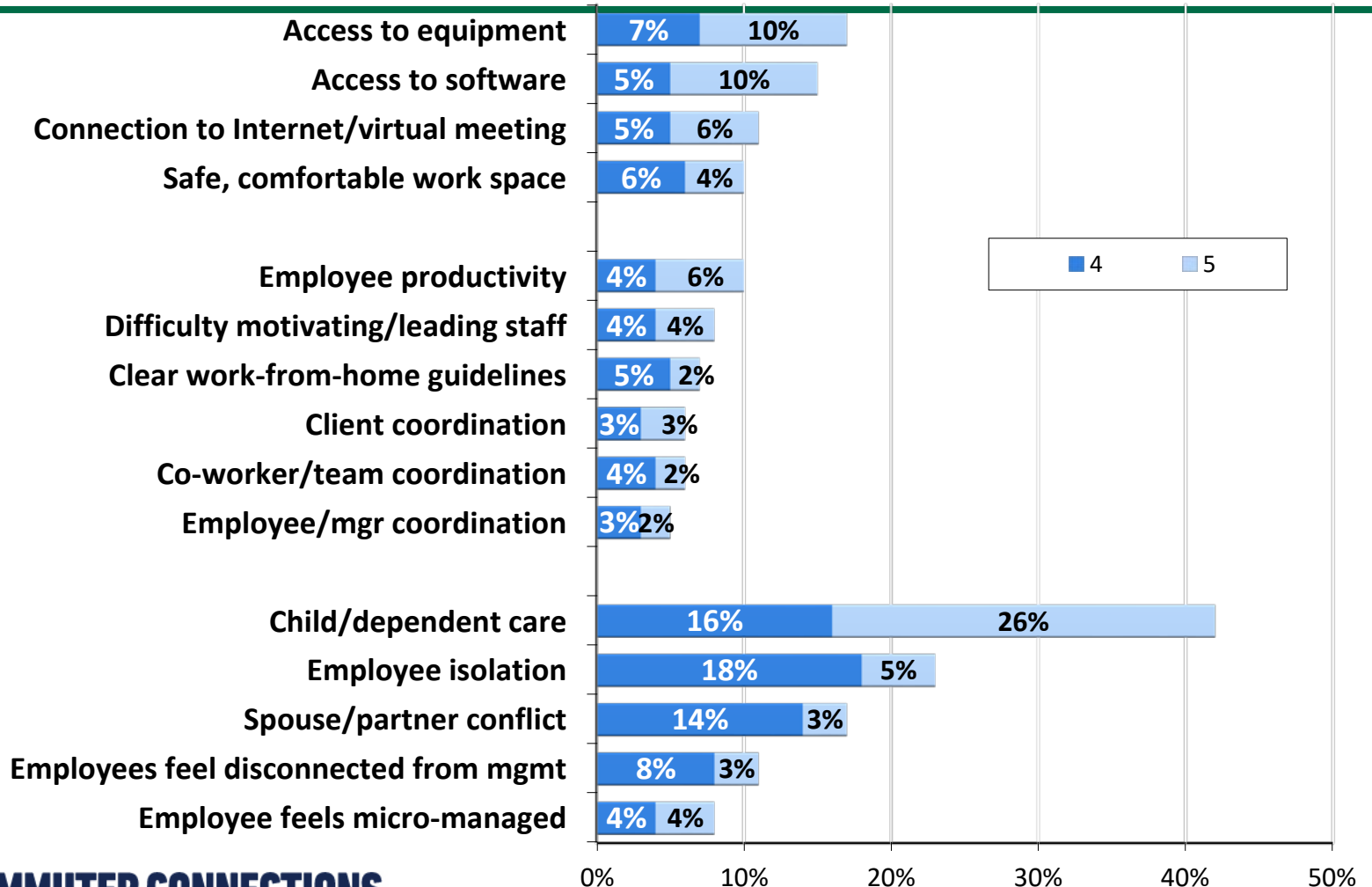


# Employers Also Have Considered Implementing Other Virus-Prevention Strategies at the Worksite



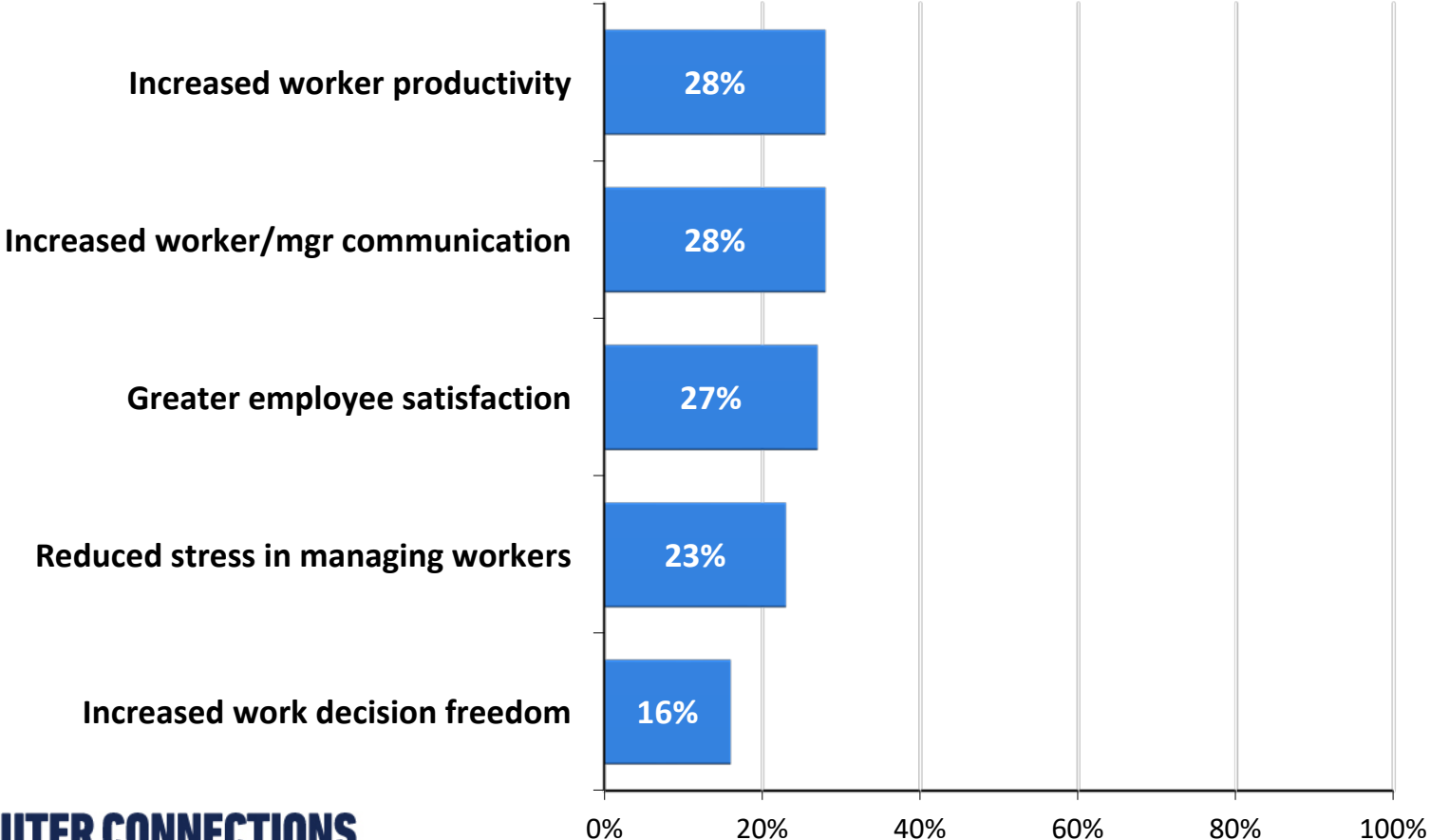
# 50% of Employers Noted A “Significant” TW Issue

*Few Reported Technical and Coordination Issues; They Reported Greater Issues with Employees’ Experience with Telework*



# 80% of Employers Said Managers Reported Benefits of Managing Remotely

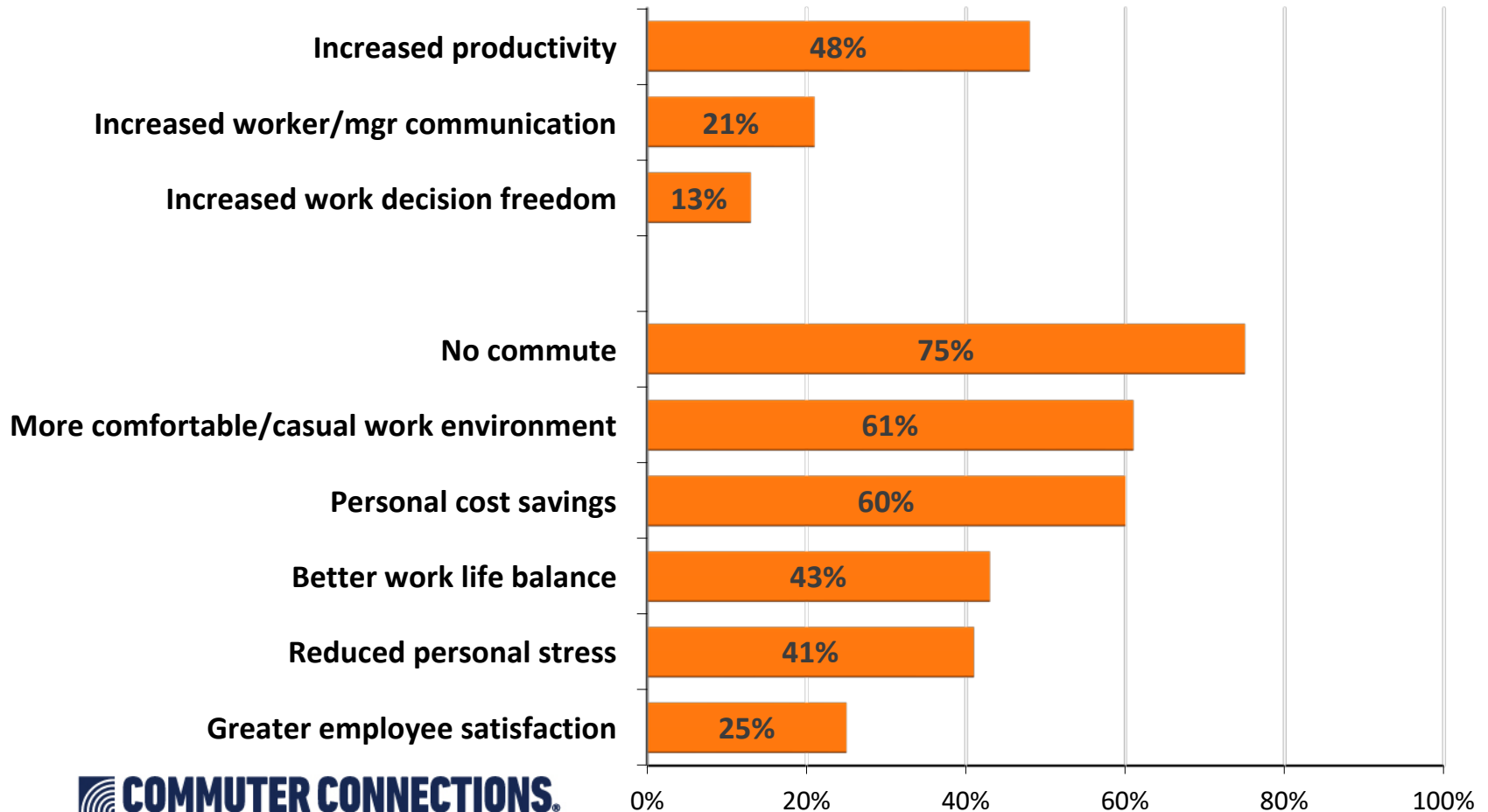
*Nearly three in ten said managers noted greater worker productivity and increased communication with workers*





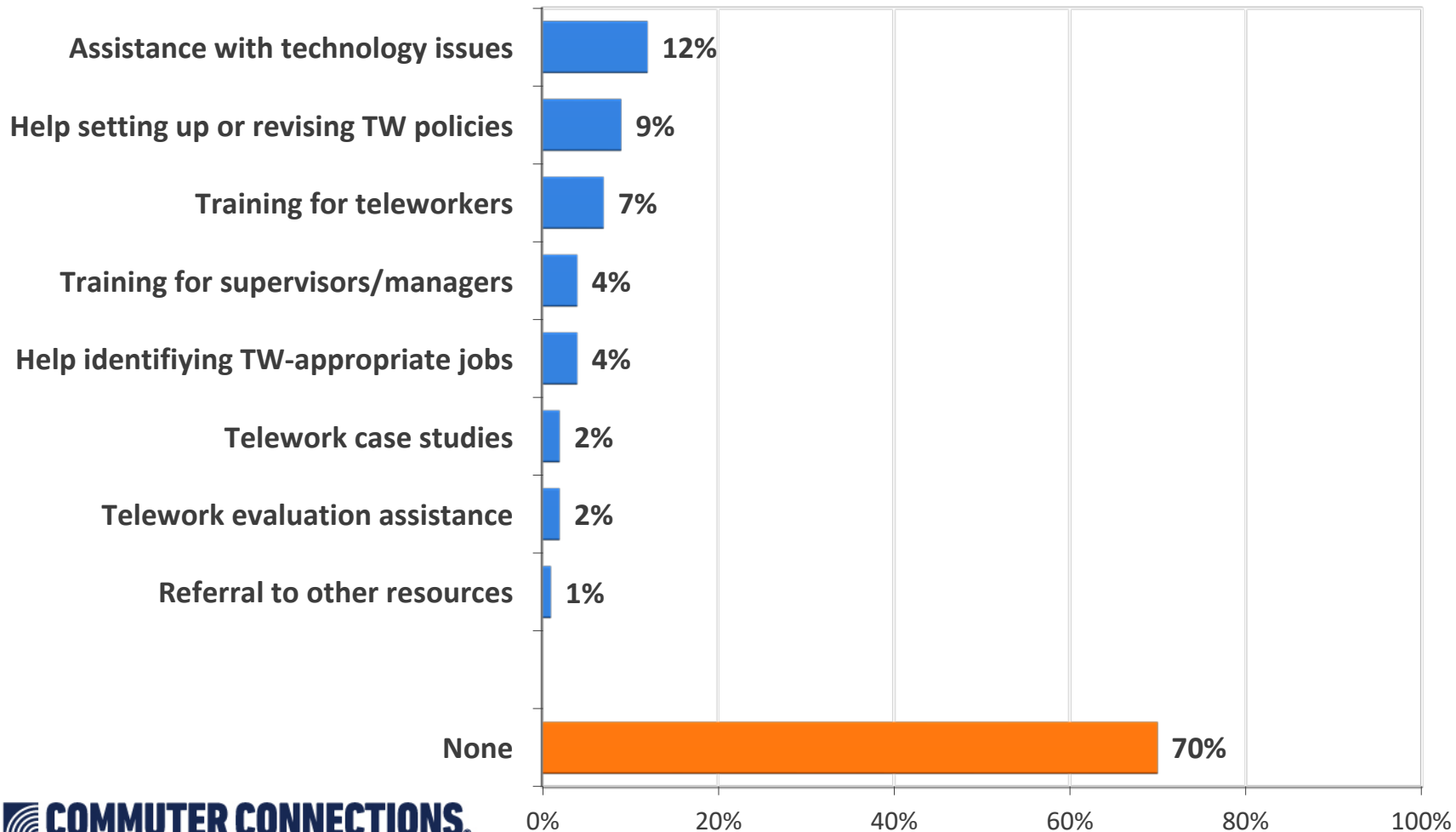
# 92% of Employers Said Employees Reported Benefits of Working From Home

*The greatest employee benefits were on not commuting, comfortable work environment, and personal cost savings*



# Three in Ten Organizations Had Received Some Telework Information or Assistance

*Half Who Received Assistance Named an Internal or Corporate Source*



# FY2020 Commuter Connections Regional Employer Telework Survey Key Highlights

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- Good cross-section of employers that responded with regards to location, size and type of industry.
- During the pandemic, the average share of employees who teleworked grew from 36% to 82% at sites with telework already in place.
- Telework was a widely applied strategy to maintain business operations during the pandemic. Nearly all (97%) respondents said at least some employees were teleworking since the start of the pandemic. More than half (55%) said all employees teleworked all of their workdays.

# FY2020 Commuter Connections Regional Employer Telework Survey Key Highlights (con't)

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- More than six in ten (61%) respondents said their organizations had a formal telework policy or program in place before the pandemic began.
- 62% of Worksites With a Telework Program/Policy Made Changes to Accommodate the Pandemic – Most Made a Change to Expand Telework Eligibility.

# FY2020 Commuter Connections Regional Employer Telework Survey Key Highlights (con't)

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- Ninety-two percent of respondents said their organizations anticipated continuing telework after the Stay-at-Home restrictions were lifted and employees could return to their usual work locations. Two in ten (20%) said they would most likely continue telework at the level during the pandemic.
- Seven in ten respondents said their organizations had considered at least one work hours or commute travel action. 64% considered actions for flexible or staggered work hours to minimize employee contact when arriving and leaving work. Three in ten (29%) considered compressed work schedules.

# FY2020 Commuter Connections Regional Employer Telework Survey Key Highlights (con't)

- More than four in ten (42%) said employees had encountered issues with child or dependent care, 23% said employees had experienced isolation and missed going to the workplace, and 17% had experienced conflict with a spouse or partner while teleworking during the pandemic.
- Nearly nine in ten (89%) respondents cited benefits they had heard employees express about their telework experience during the pandemic.
- About half (52%) of respondents noted benefits they heard managers express about their experience managing remotely during the pandemic.

## Nicholas Ramfos

(202) 962-3313

[nramfos@mwkog.org](mailto:nramfos@mwkog.org)

[commuterconnections.org](http://commuterconnections.org)

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Metropolitan Washington Council of Governments  
777 North Capitol Street NE, Suite 300  
Washington, DC 20002