

# COMMUTER CONNECTIONS 2020 EMPLOYER TELEWORK SURVEY

ITEM #8

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## Corona Virus Pandemic Survey Results

Nicholas Ramfos  
Director, Transportation Operations Programs

National Capital Region Transportation Planning Board  
Technical Committee  
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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 to Maryland employers. This analysis uses data from a survey of telework-assisted Maryland employers to determine:
  - Percentage of Maryland employers with telework programs before and after receiving telework assistance
  - Percentage of teleworkers at assisted Maryland worksites before and after the employer received assistance

# Survey Objectives and Methodology (con't)

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- The Maryland-based telework attributable to the Telework program element is calculated by defining the telework universe among Maryland commuters, and examines employers' and commuters' sources of information for telework and the value of that information or assistance in their starting or expanding telework programs.
- A similar analysis is conducted for Virginia employers and teleworkers through the Telework!VA program.
- Due to the 2020 Coronavirus Pandemic, the employer survey was expanded to cover all employers in the region.

# 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 ETC/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)

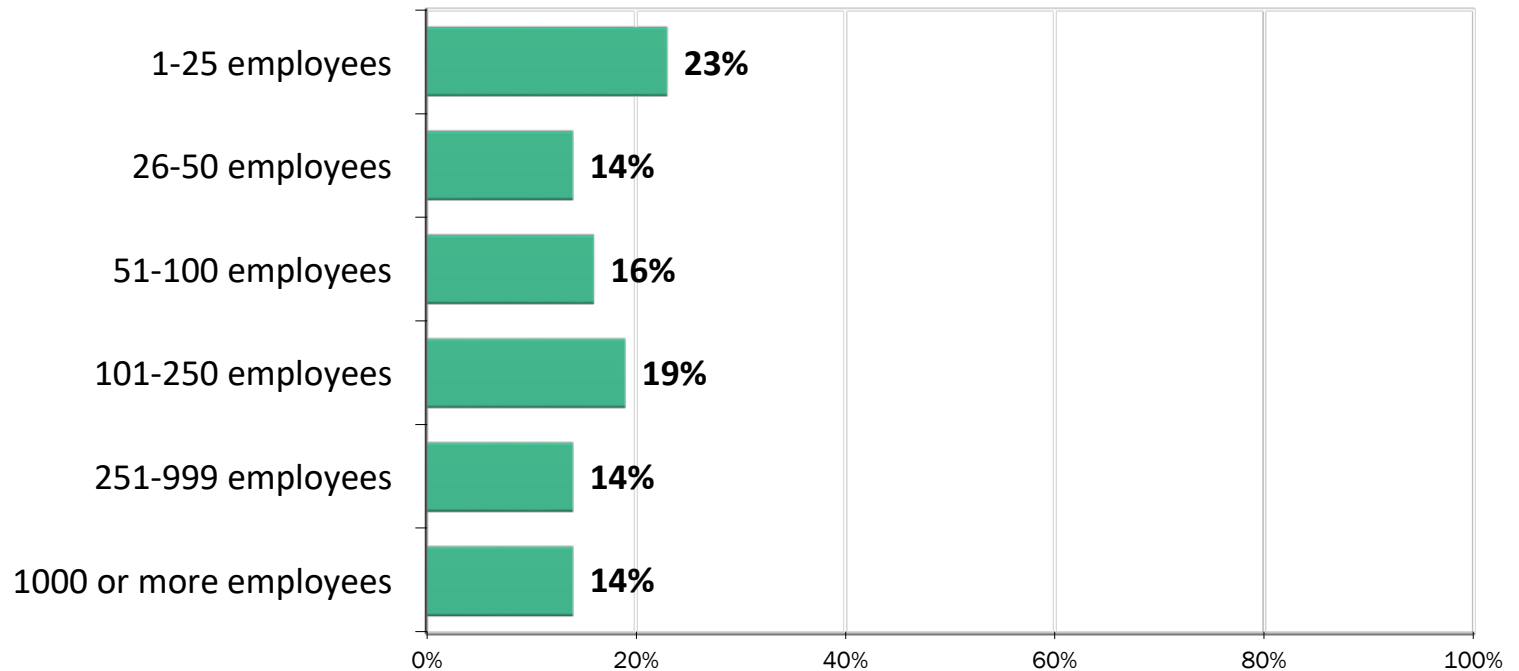
# Survey Objectives and Methodology

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- 4,539 Employers were contacted in May and June 2020 and 180 responded for a 4% response rate
- Survey conducted by LDA Consulting in conjunction with CIC Research, Inc.
- Companion briefing report

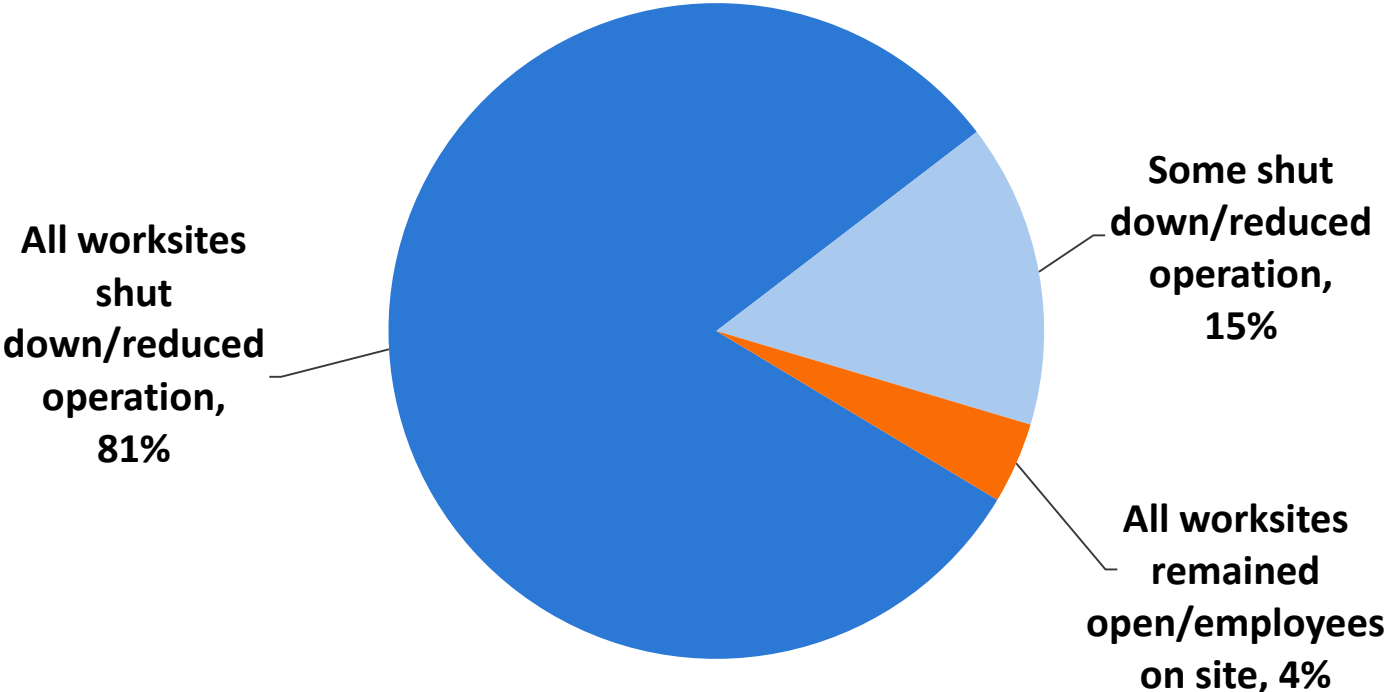
# Employer Profile – Diverse Sample

- 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



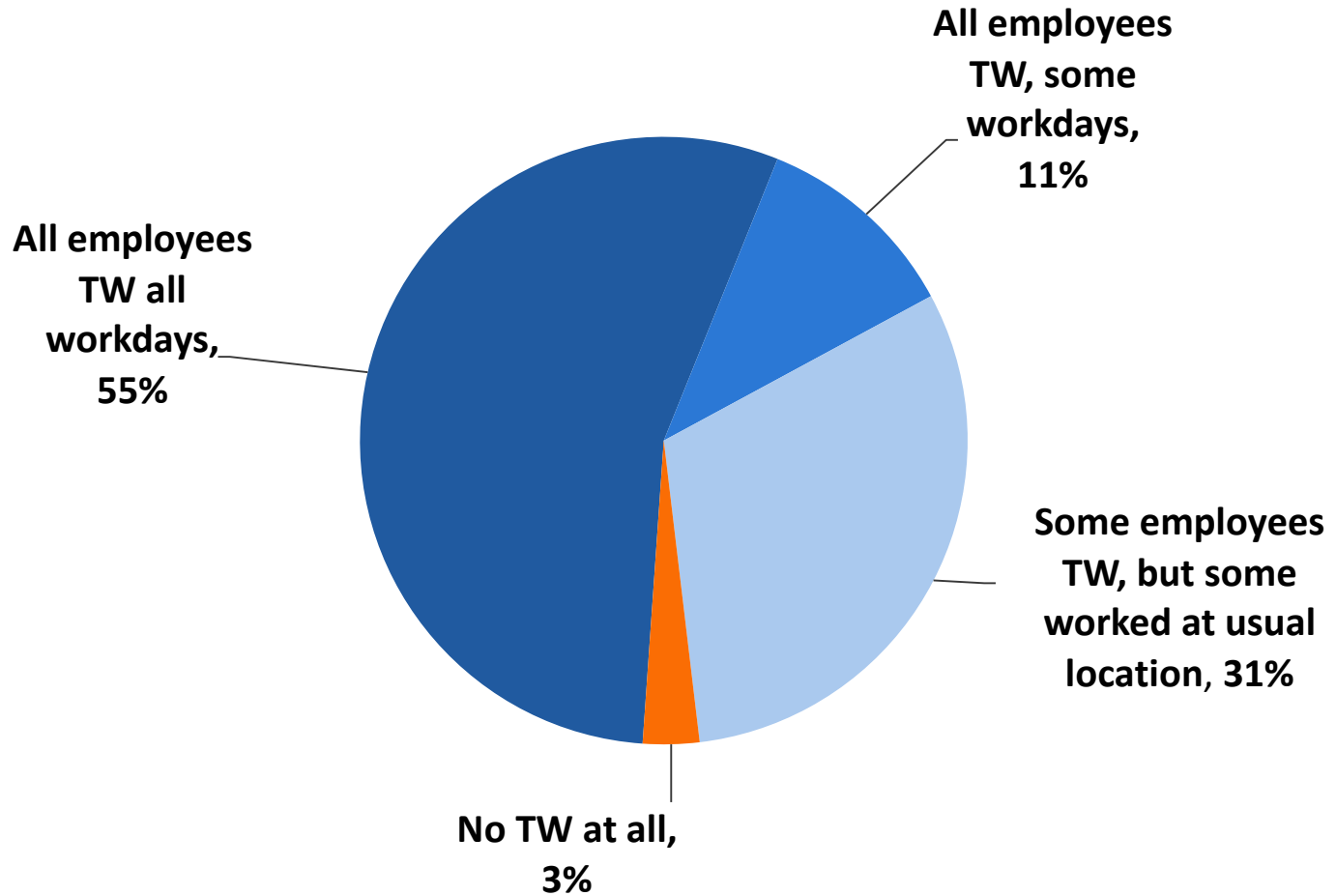
# 96% of Worksites Shut Down or Reduced On-site Operation Either Completely (81%) or Partially (15%) Since Coronavirus Pandemic Began

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



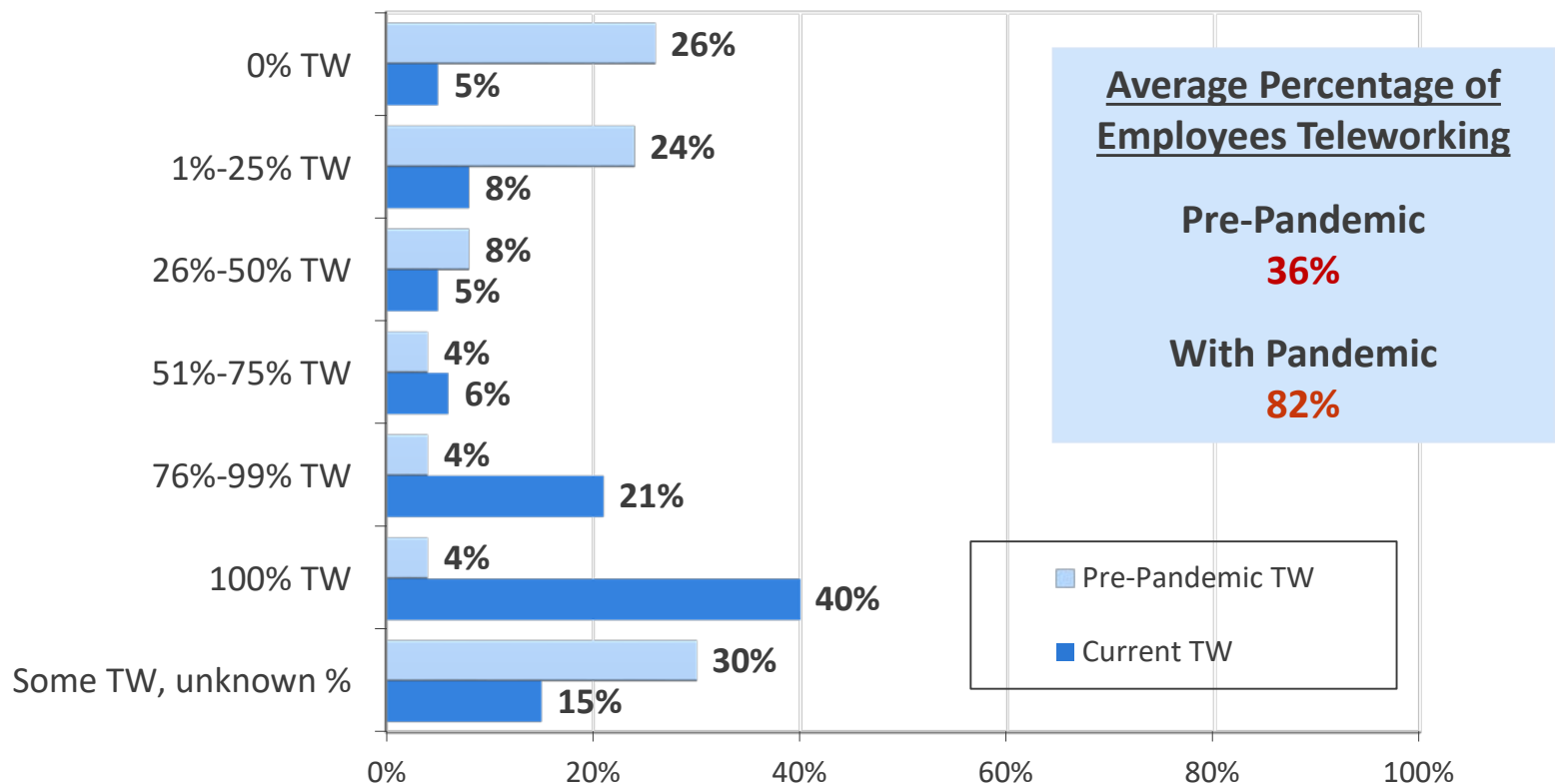


# 97% of Worksites Had At Least Some Telework Since Pandemic Began – For 55%, It was Full-time for All Employees

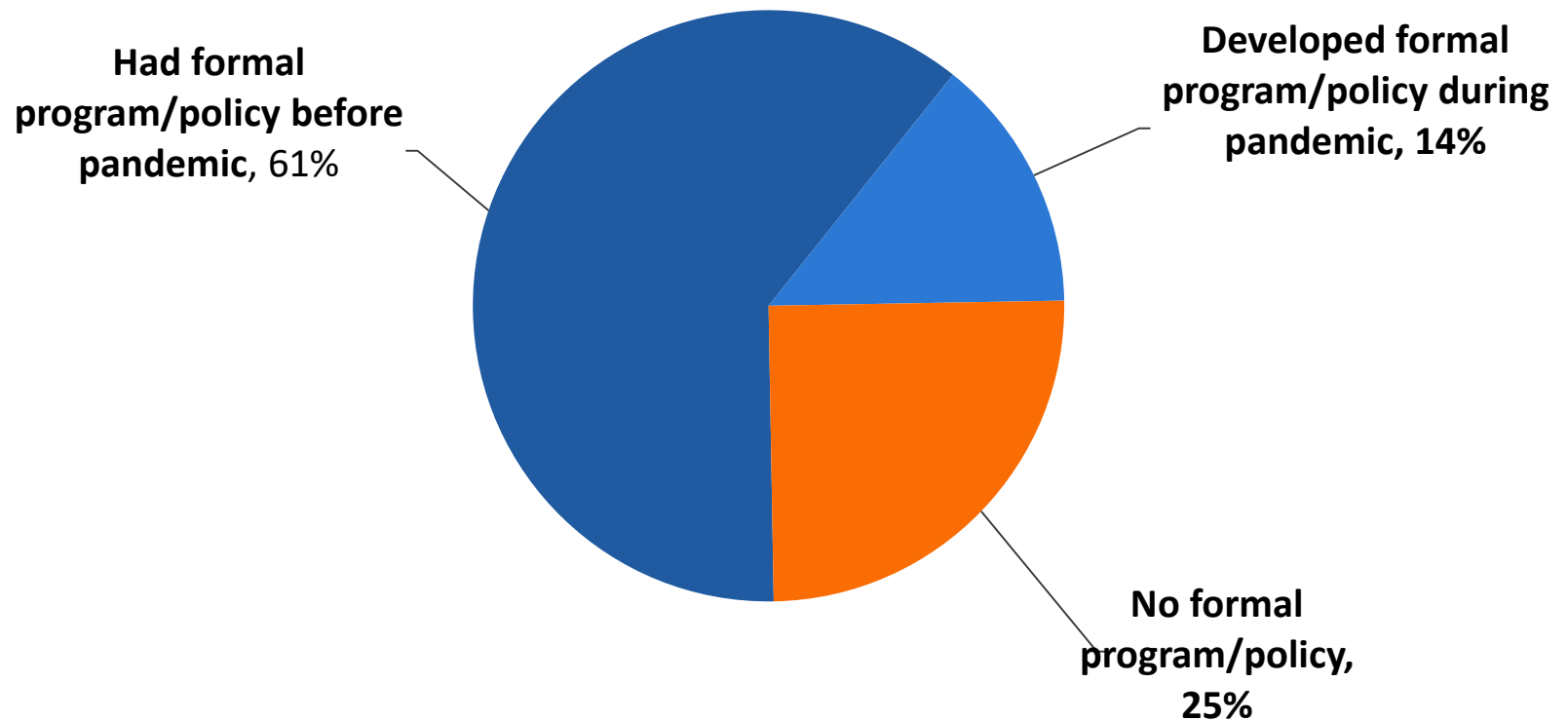


# At the Time of the Survey, 95% of Worksites Had Telework; Telework Was Common Pre-Pandemic Also - 76% Had At Least Some Telework Before

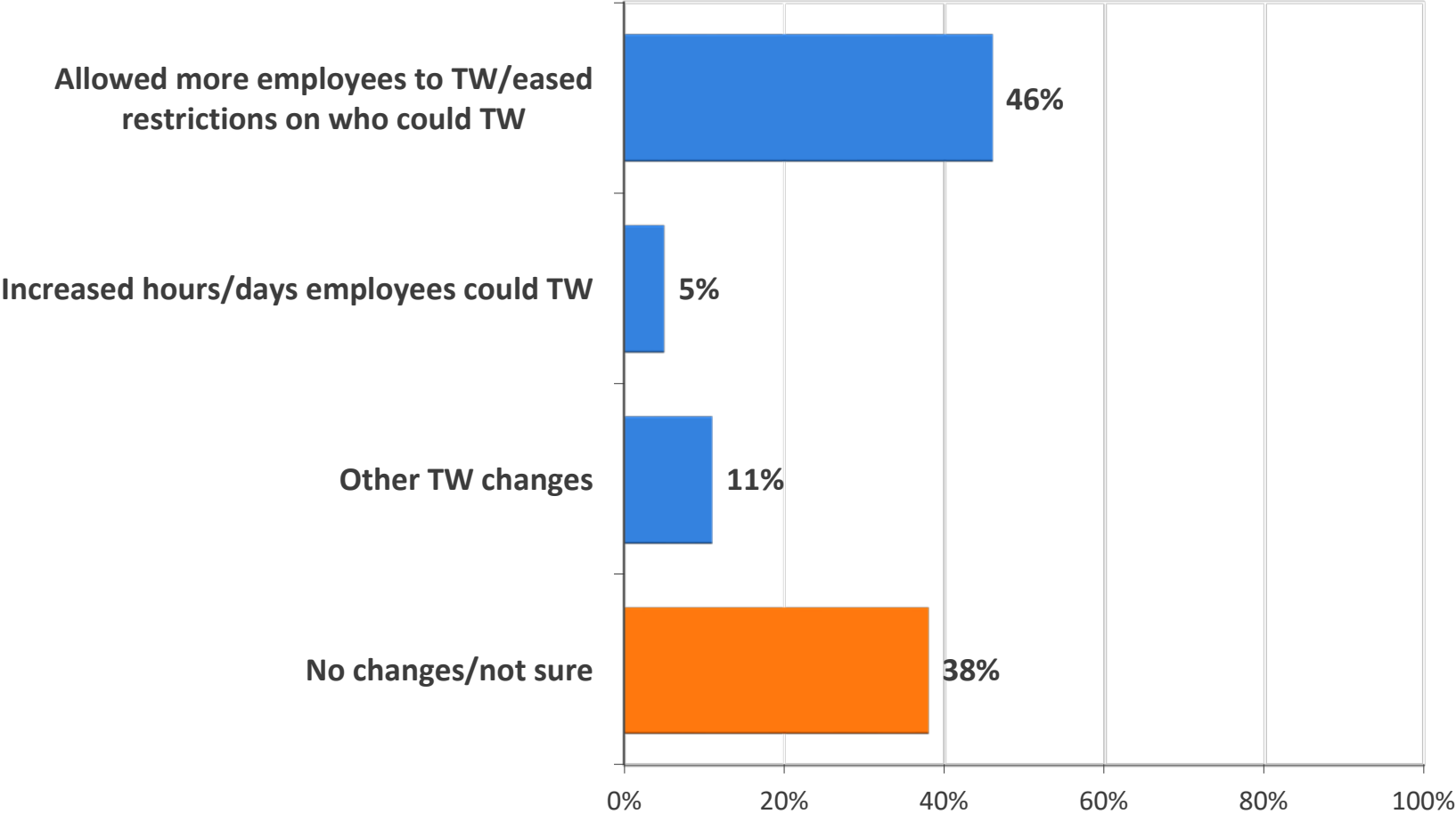
*But during the pandemic, the average share of employees who teleworked grew from 36% to 82% at sites with telework*



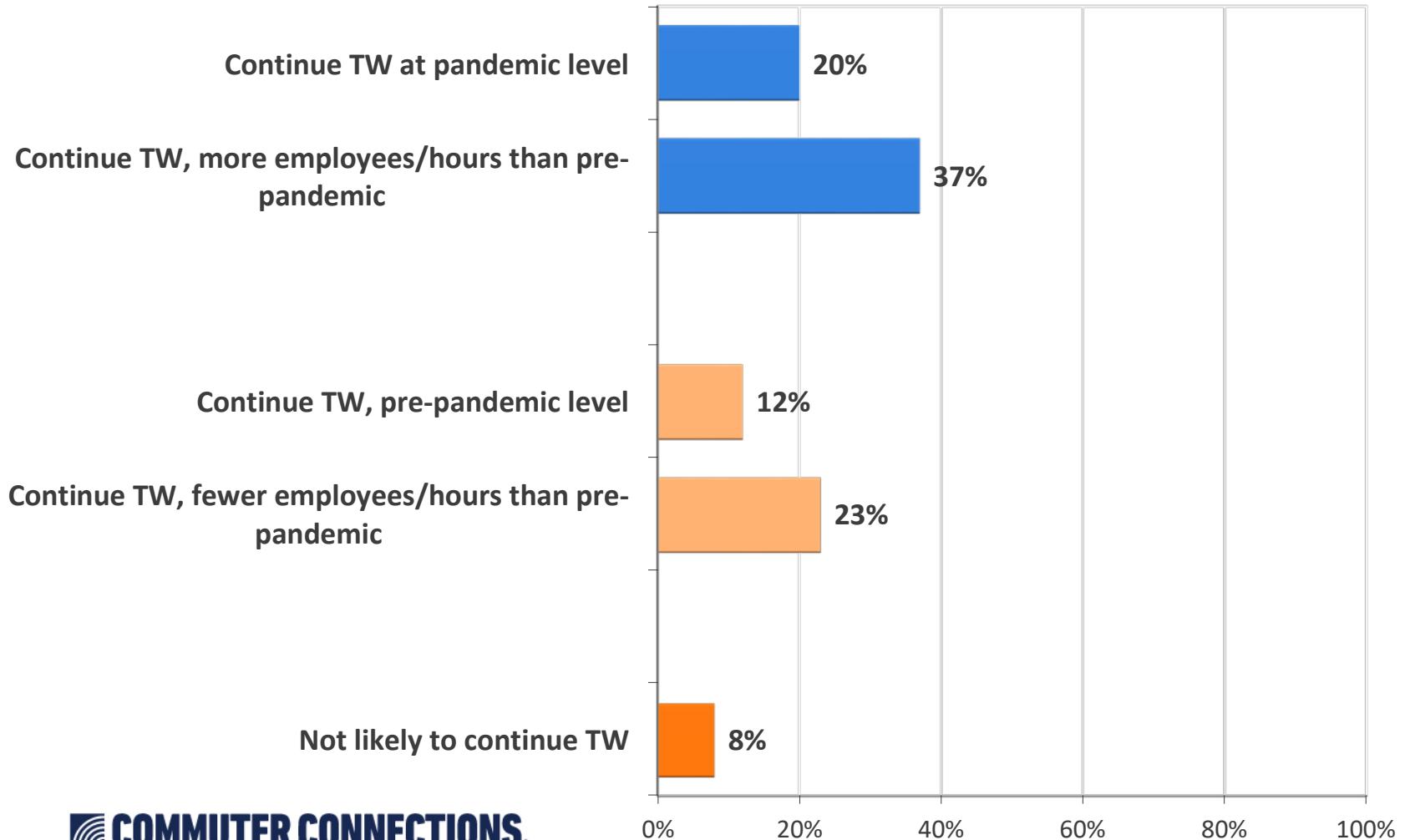
# During the Pandemic, 14% of Worksites Developed a Formal Telework Program/Policy; 61% of Worksites Already Had a Formal Program/Policy before the Pandemic



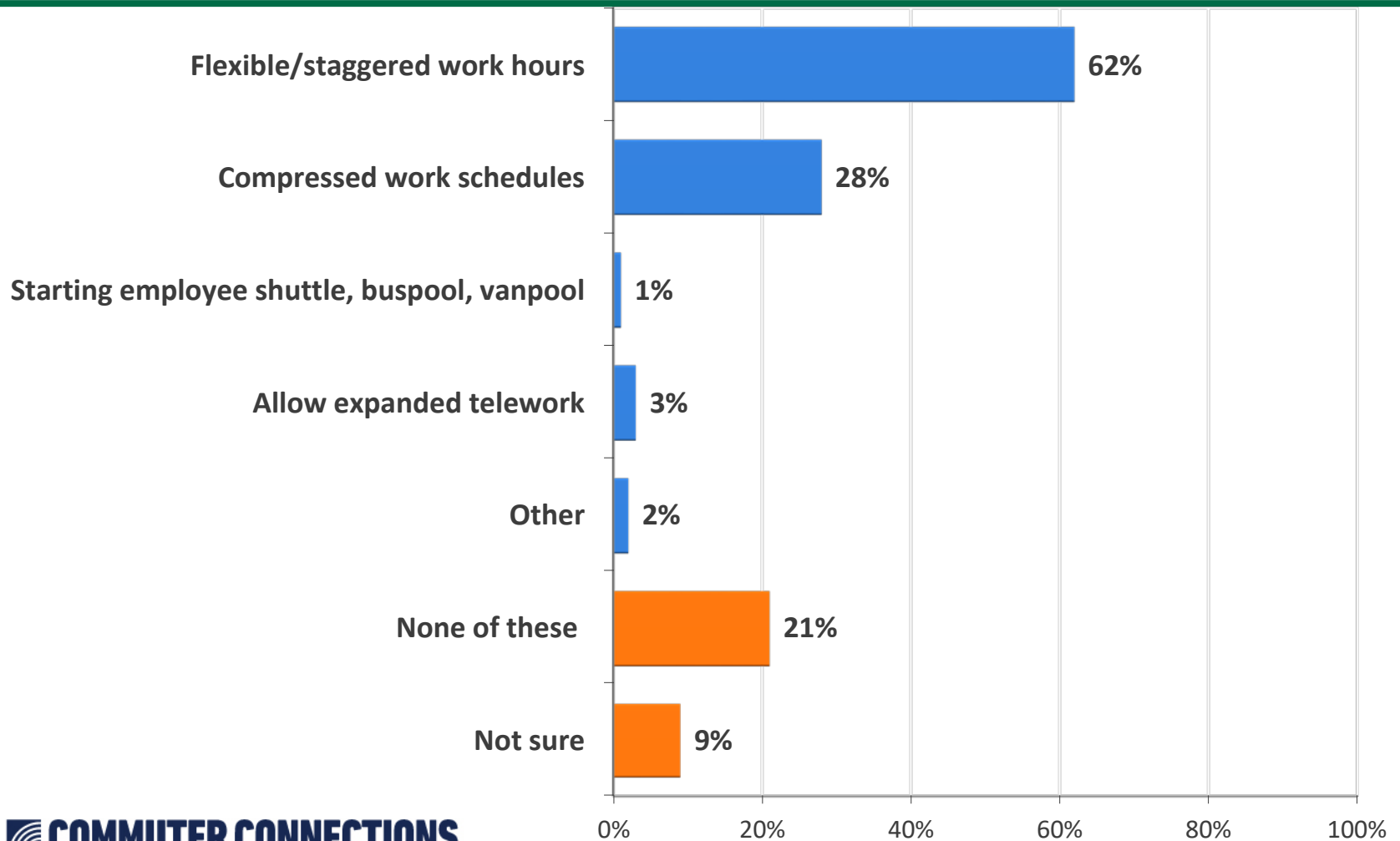
# 62% of Worksites With a Telework Program/Policy Made Changes to Accommodate the Pandemic – Most Made a Change to Expand Telework Eligibility



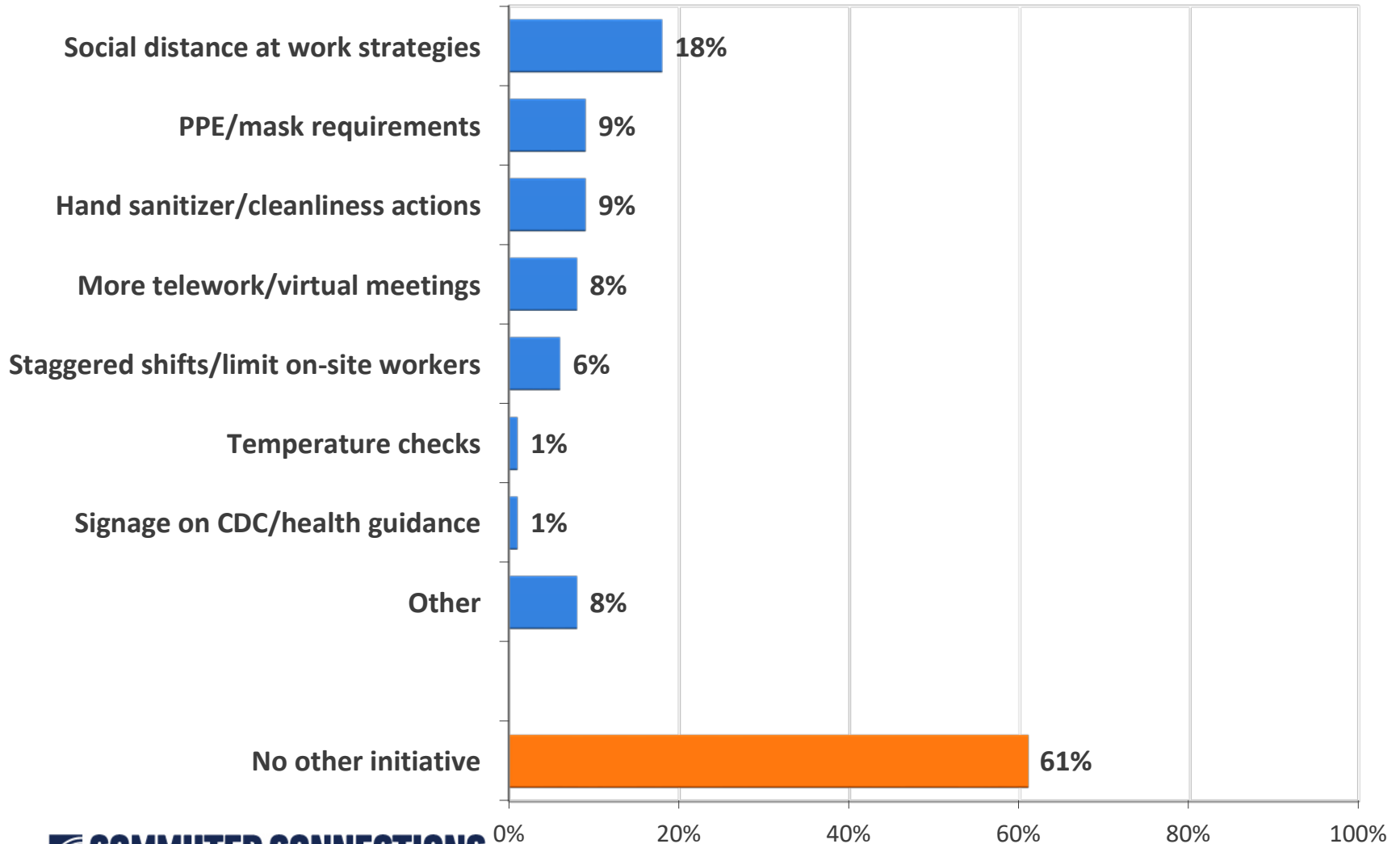
# More than Half of Worksites Anticipate A Post-Pandemic Telework Level that is Higher Than the Pre-Pandemic Level



# 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

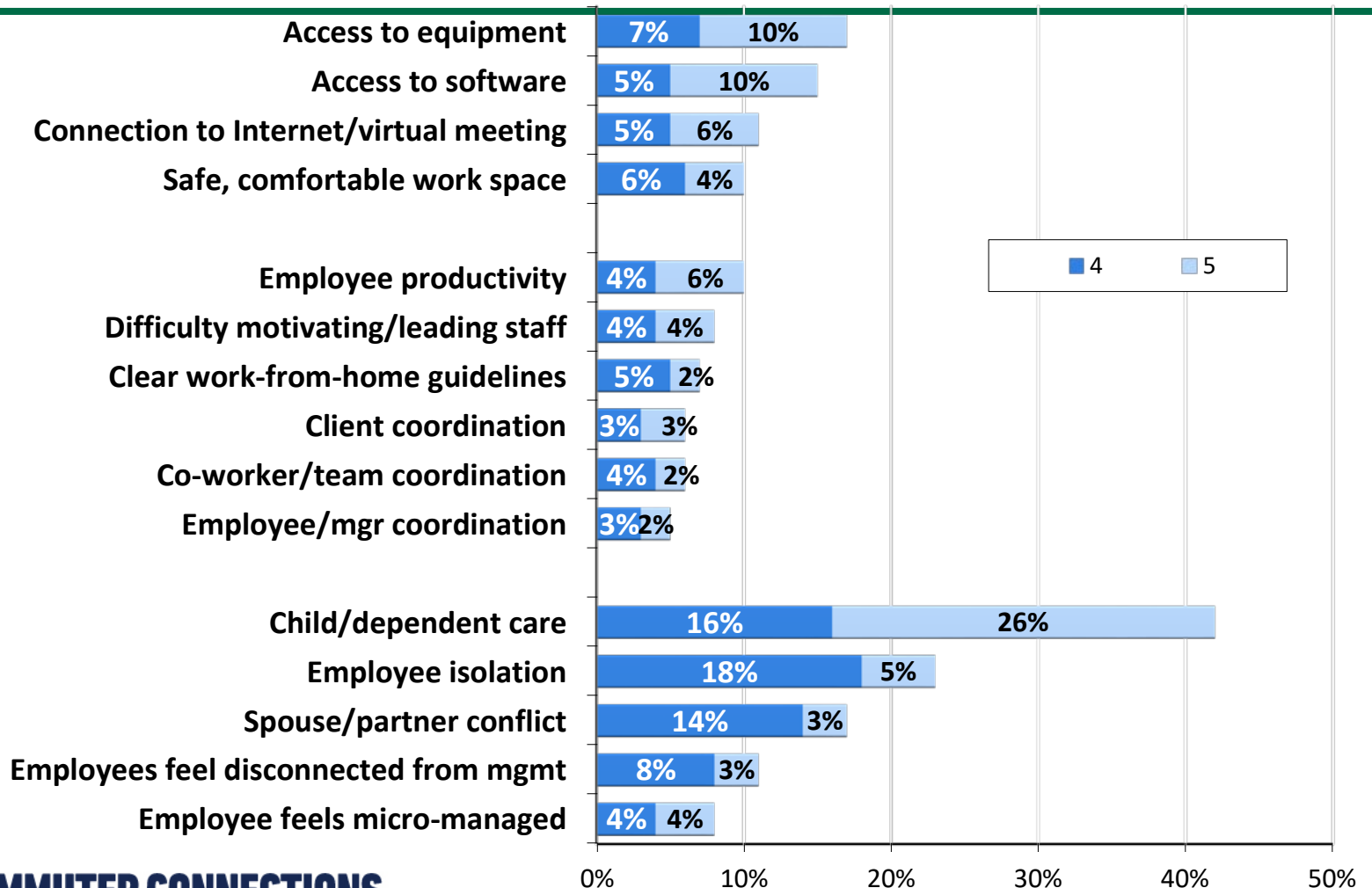


# Employers Also Have Considered Implementing Other Virus-Prevention Strategies at the Worksite



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

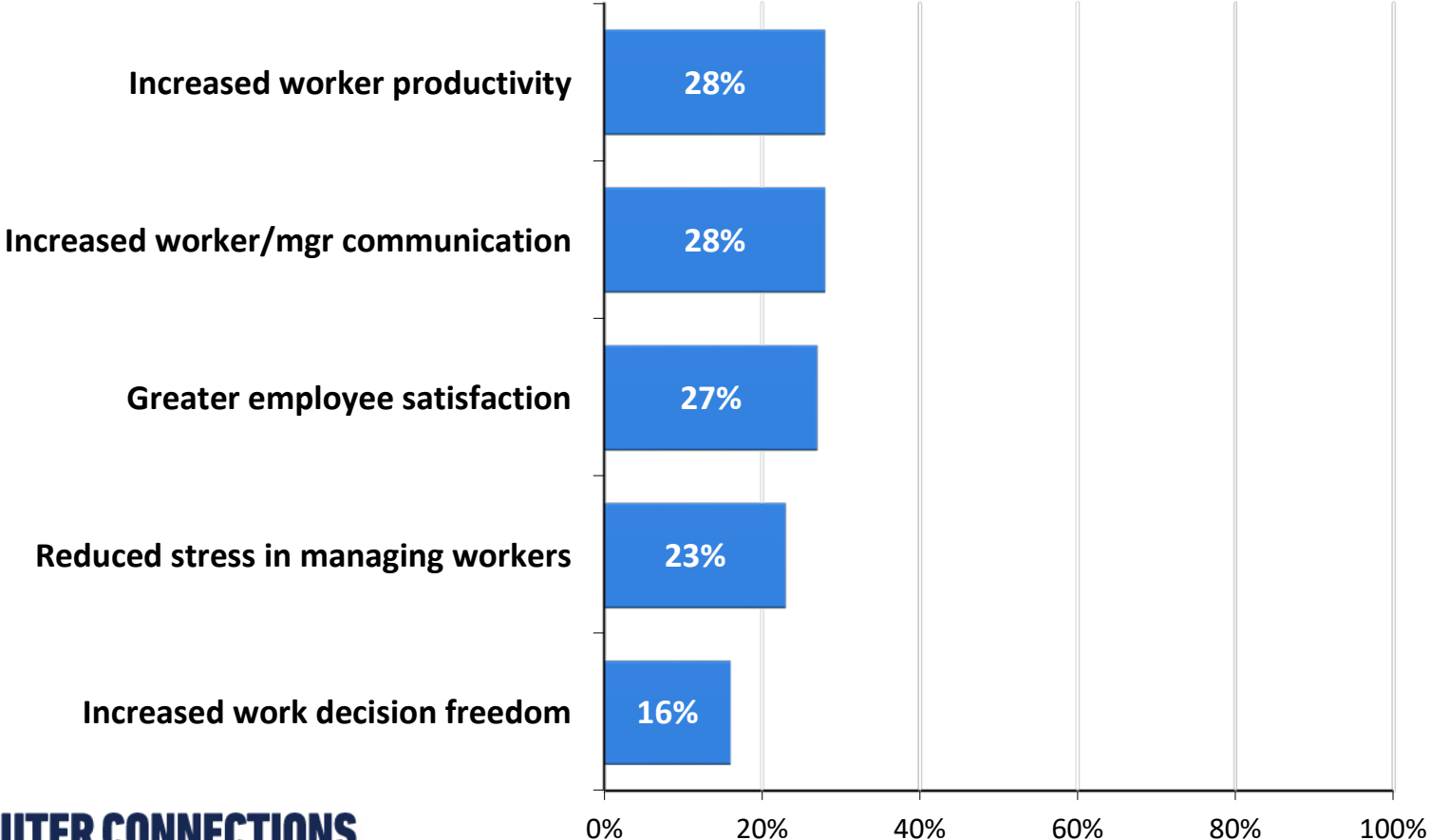
*Few Reported Technical and Coordination Issues; They Reported Greater Issues with Employees’ Experience with Telework*





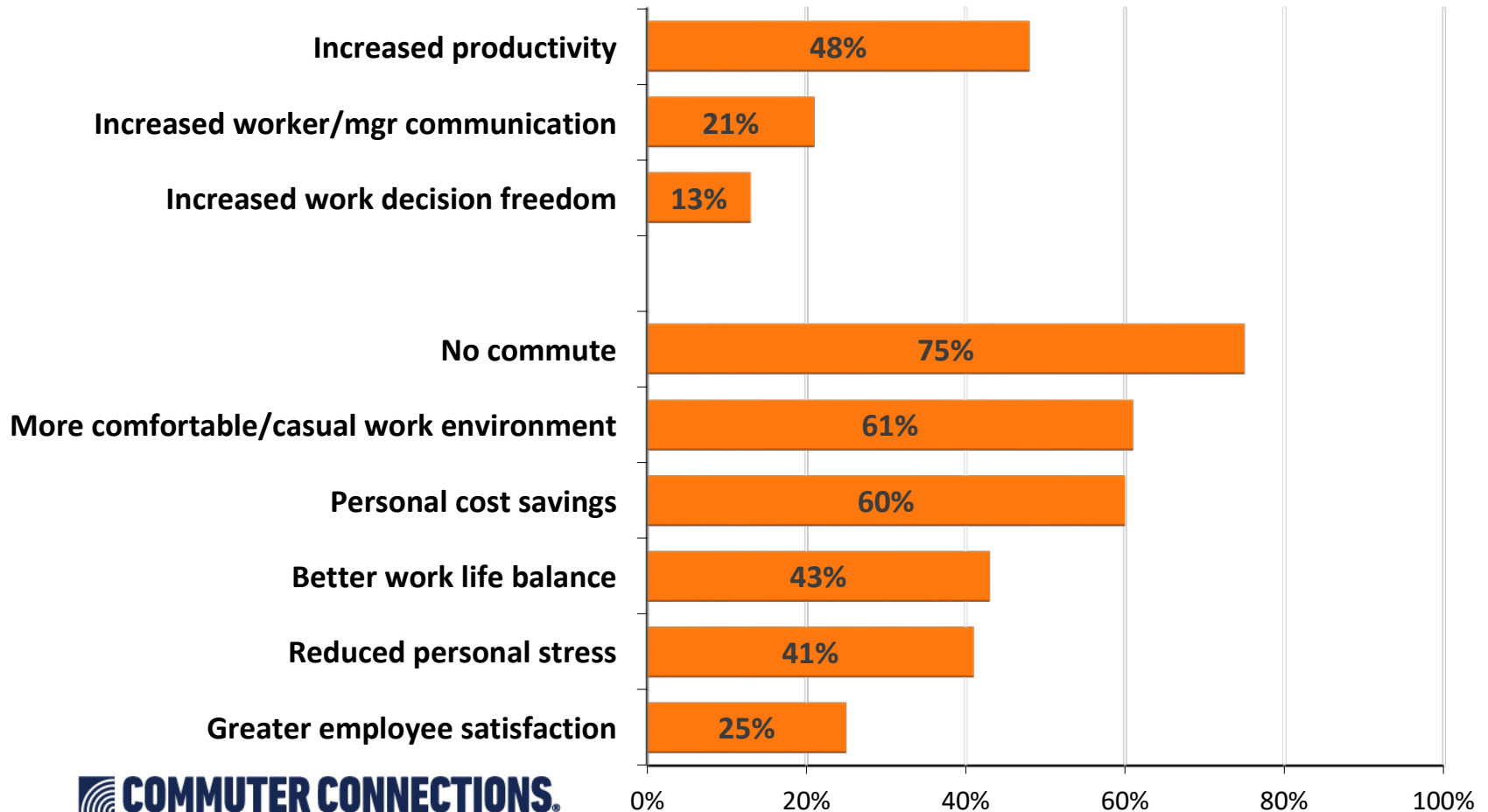
# 80% of Employers Said Managers Reported Benefits of Managing Remotely

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



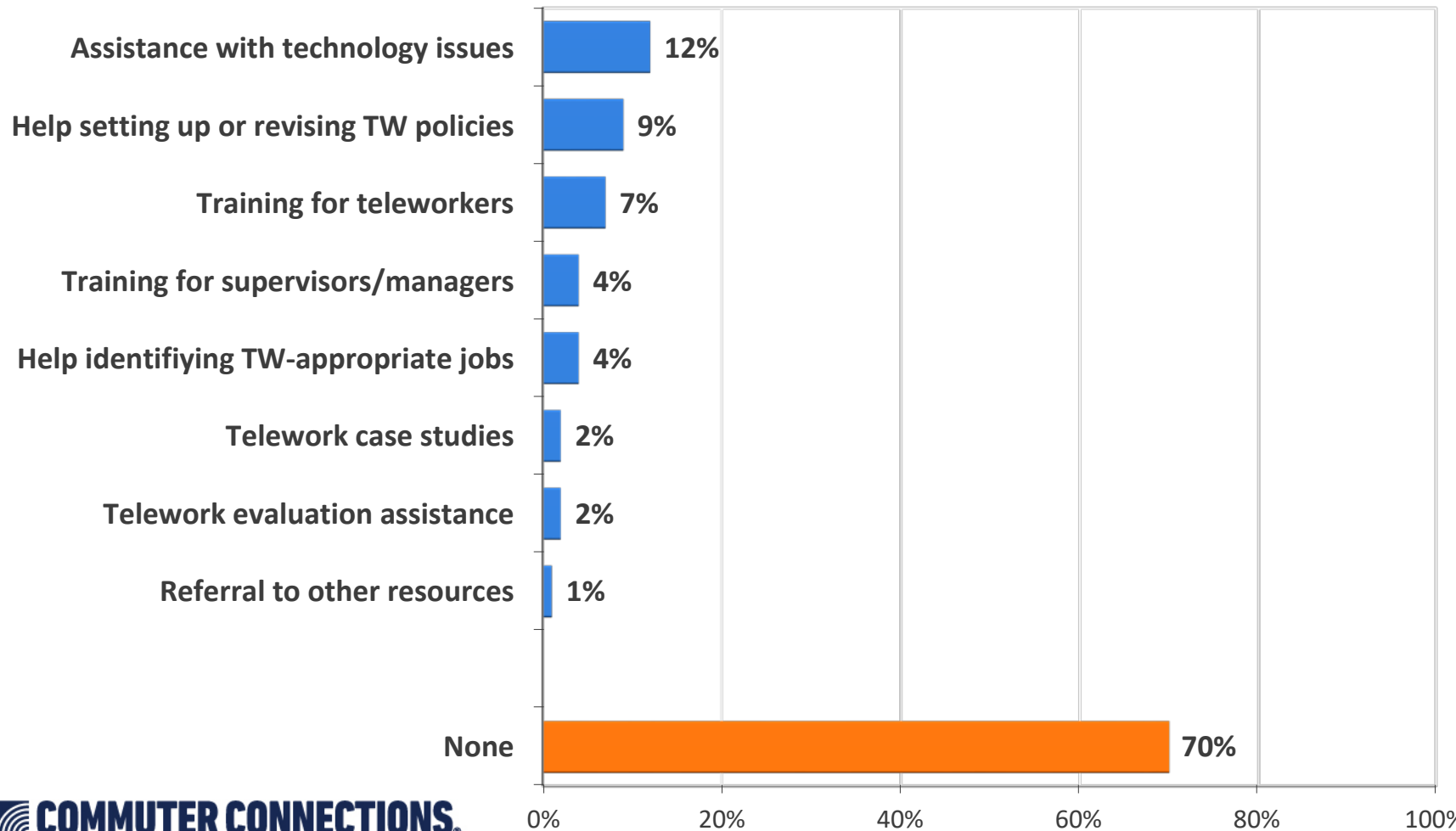
# 92% of Employers Said Employees Reported Benefits of Working From Home

*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*



## Nicholas Ramfos

(202) 962-3313

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

[commuterconnections.org](https://www.commuterconnections.org)

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