

COMMUTER CONNECTIONS 2020 EMPLOYER TELEWORK SURVEY

Coronavirus Pandemic Survey Results

Nicholas Ramfos
Director, Transportation Operations Programs

National Capital Region Transportation Planning Board
September 16, 2020

Survey Objectives and Methodology

- 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)

- 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)

The questionnaire addressed the following broad topics:

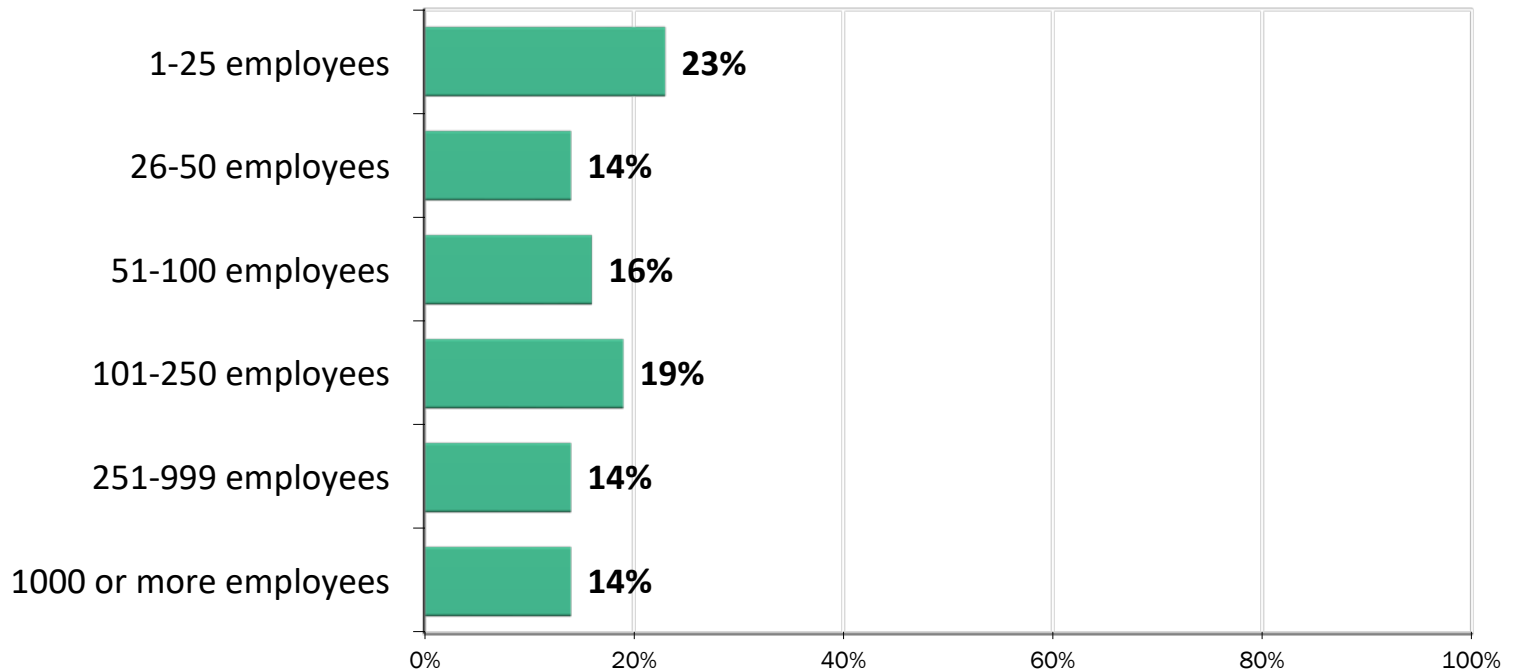
- Change in worksite operation due to coronavirus pandemic
- Number of employees teleworking at the time of the survey and before the pandemic
- Changes in telework programs or policies in response to the pandemic
- Likelihood to continue telework after the pandemic ends
- Assistance received with telework 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

- 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.

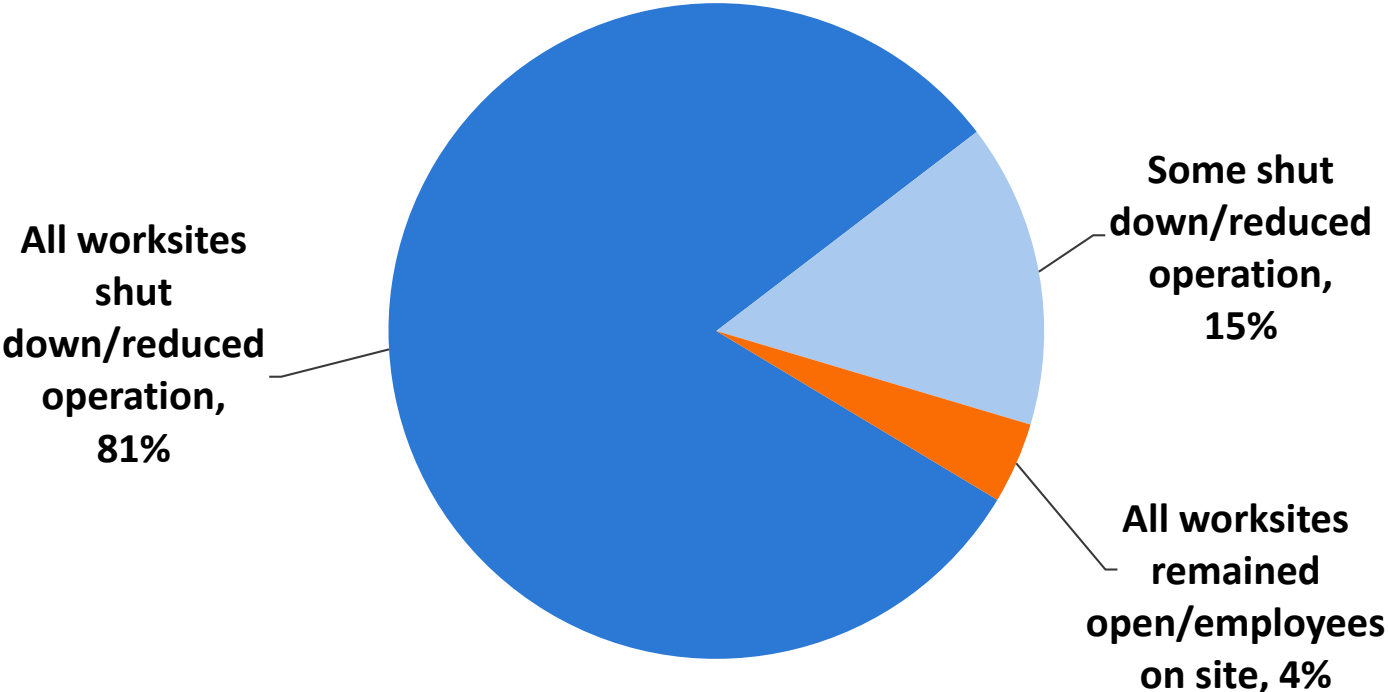
Employer Profile – Diverse Sample

- 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

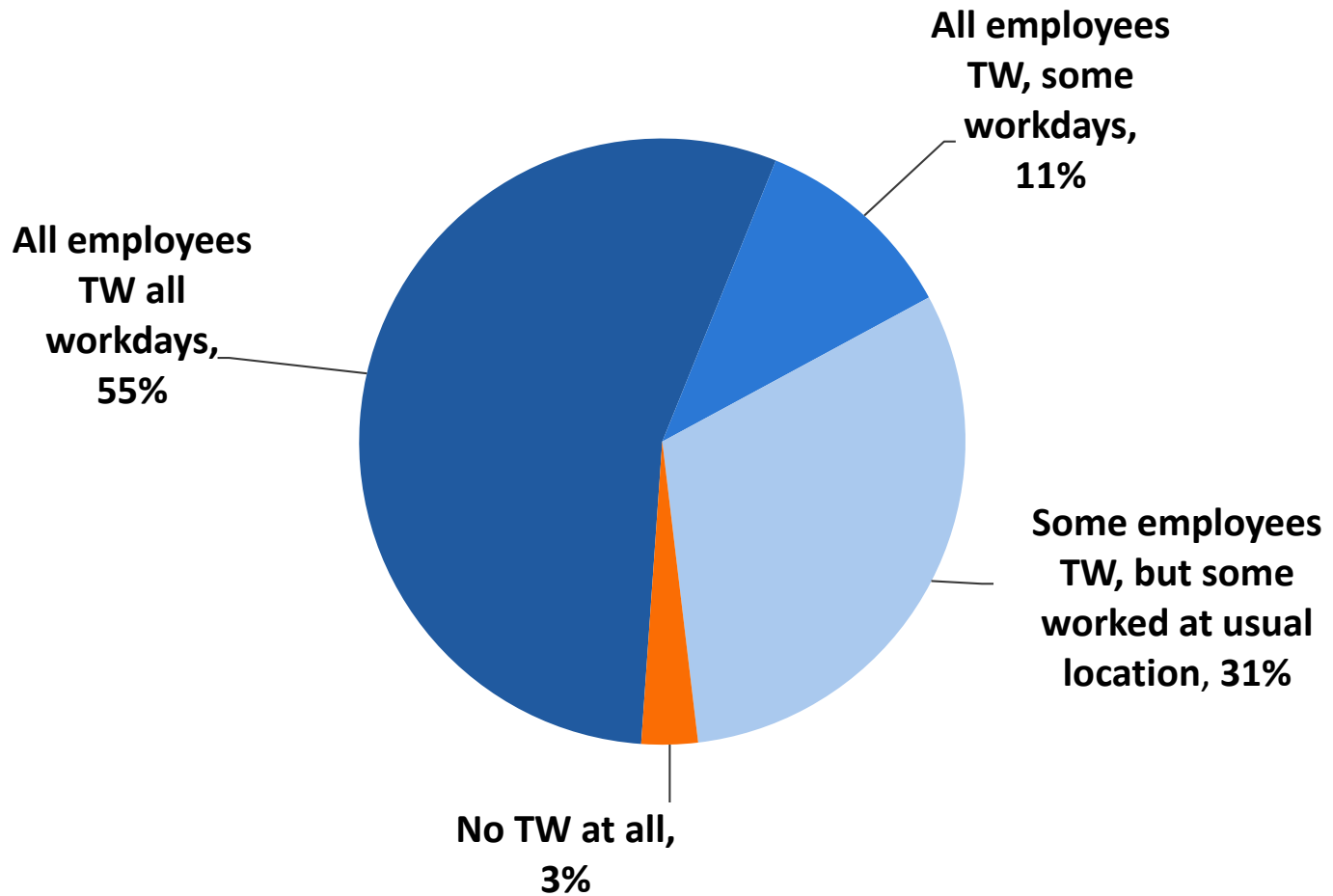


96% of Worksites Shut Down or Reduced On-site Operation Either Completely (81%) or Partially (15%) Since Coronavirus Pandemic Began

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

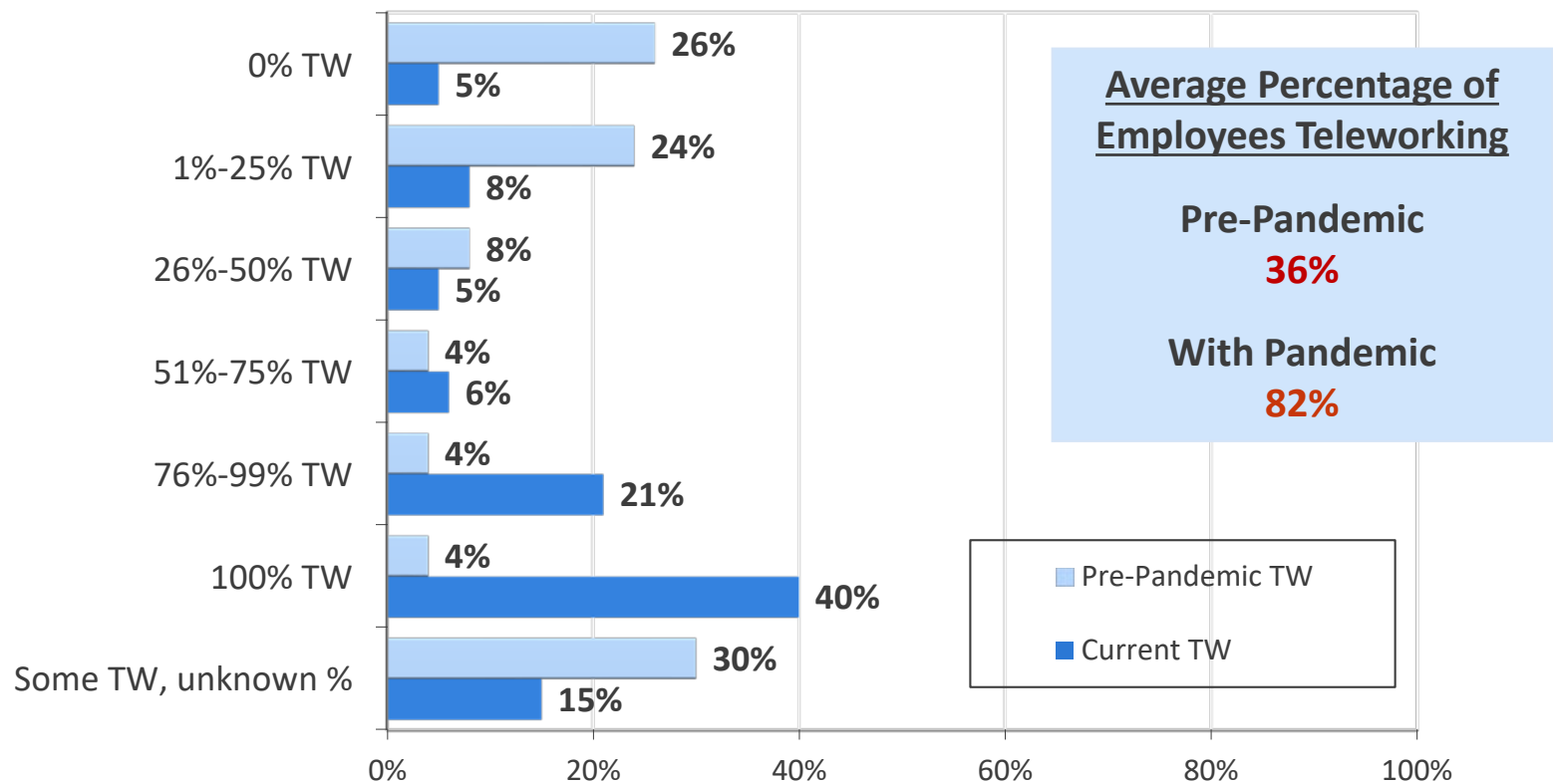


97% of Worksites Had At Least Some Telework Since Pandemic Began – For 55%, It was Full-time for All Employees

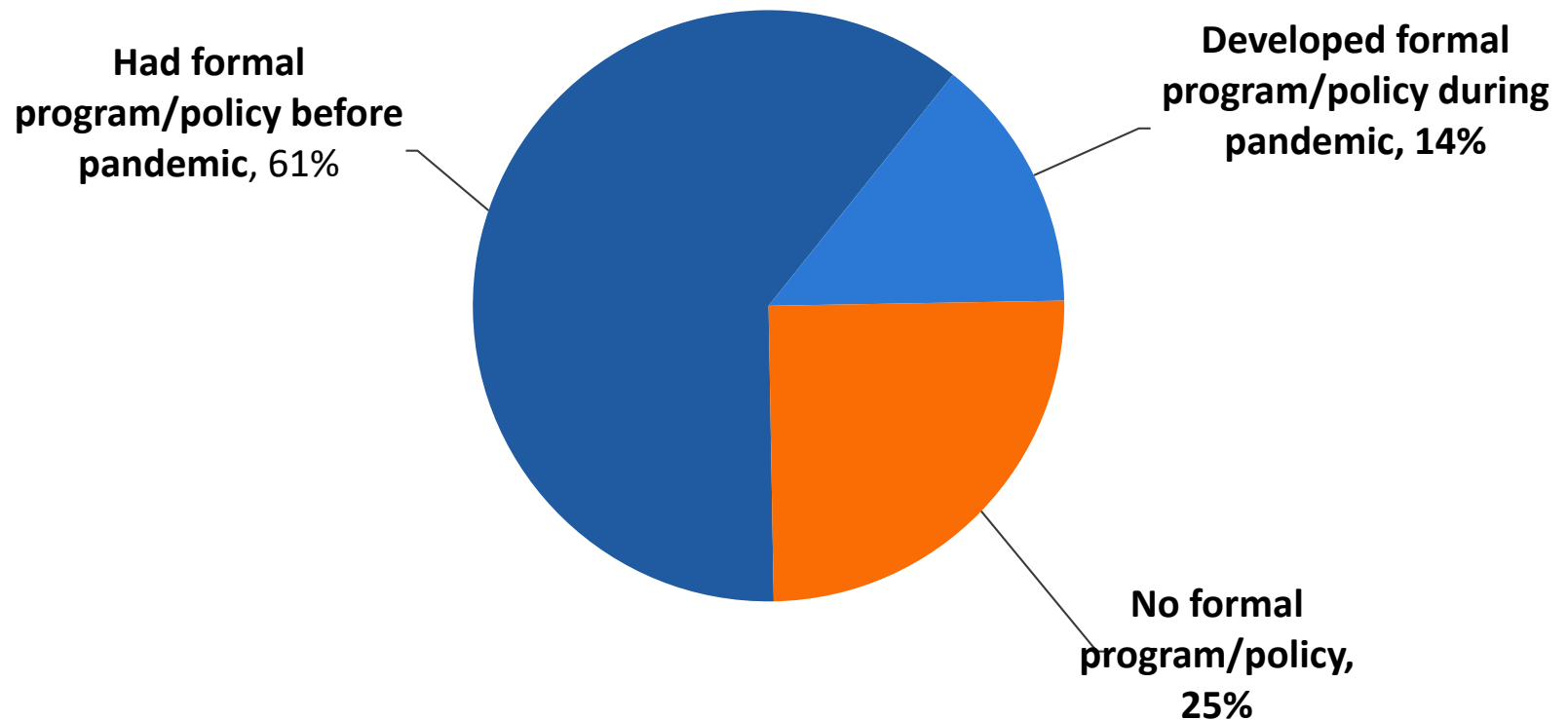


At the Time of the Survey, 95% of Worksites Had Telework; Telework Was Common Pre-Pandemic Also - 76% Had At Least Some Telework Before

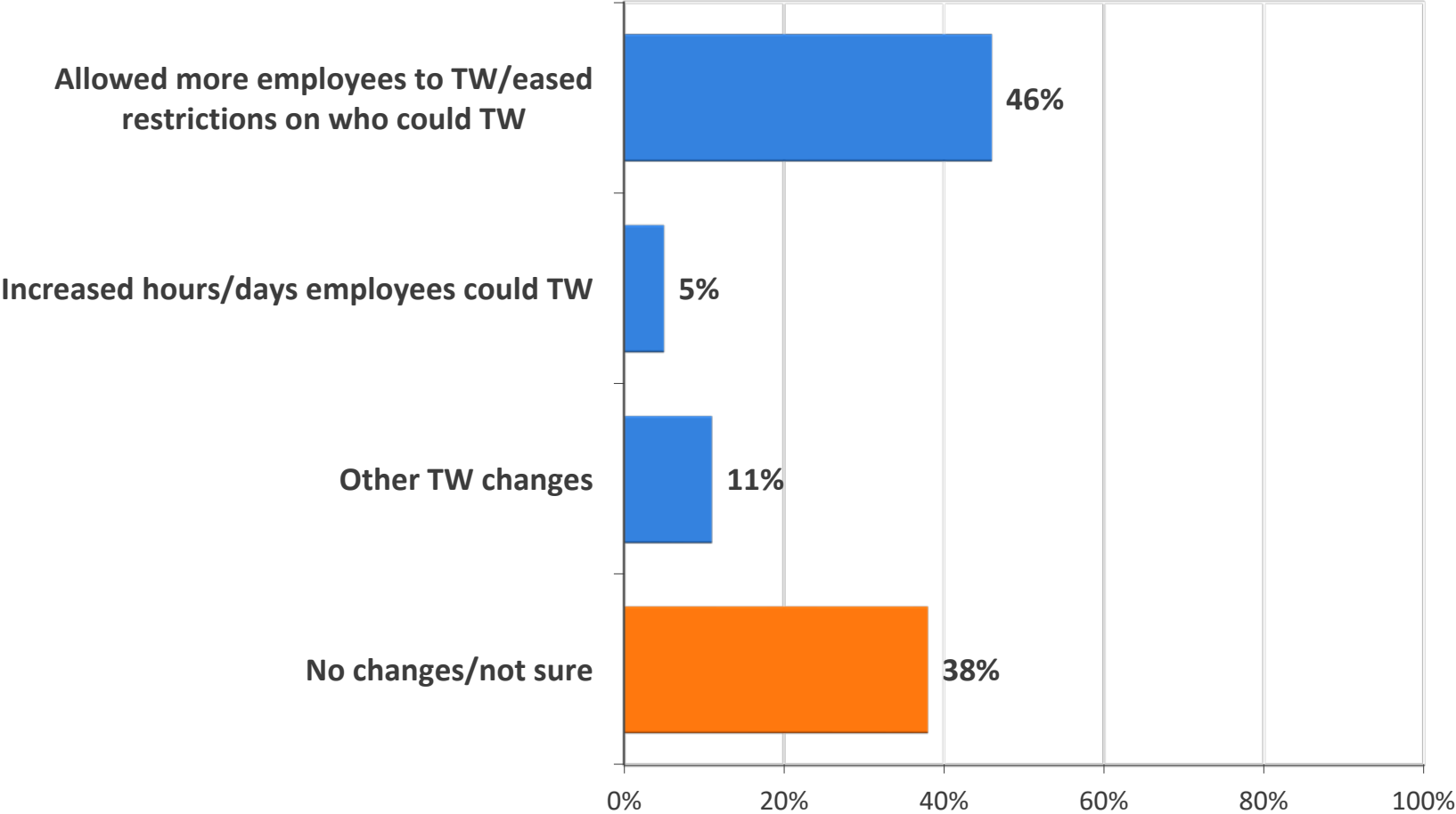
But during the pandemic, the average share of employees who teleworked grew from 36% to 82% at sites with telework



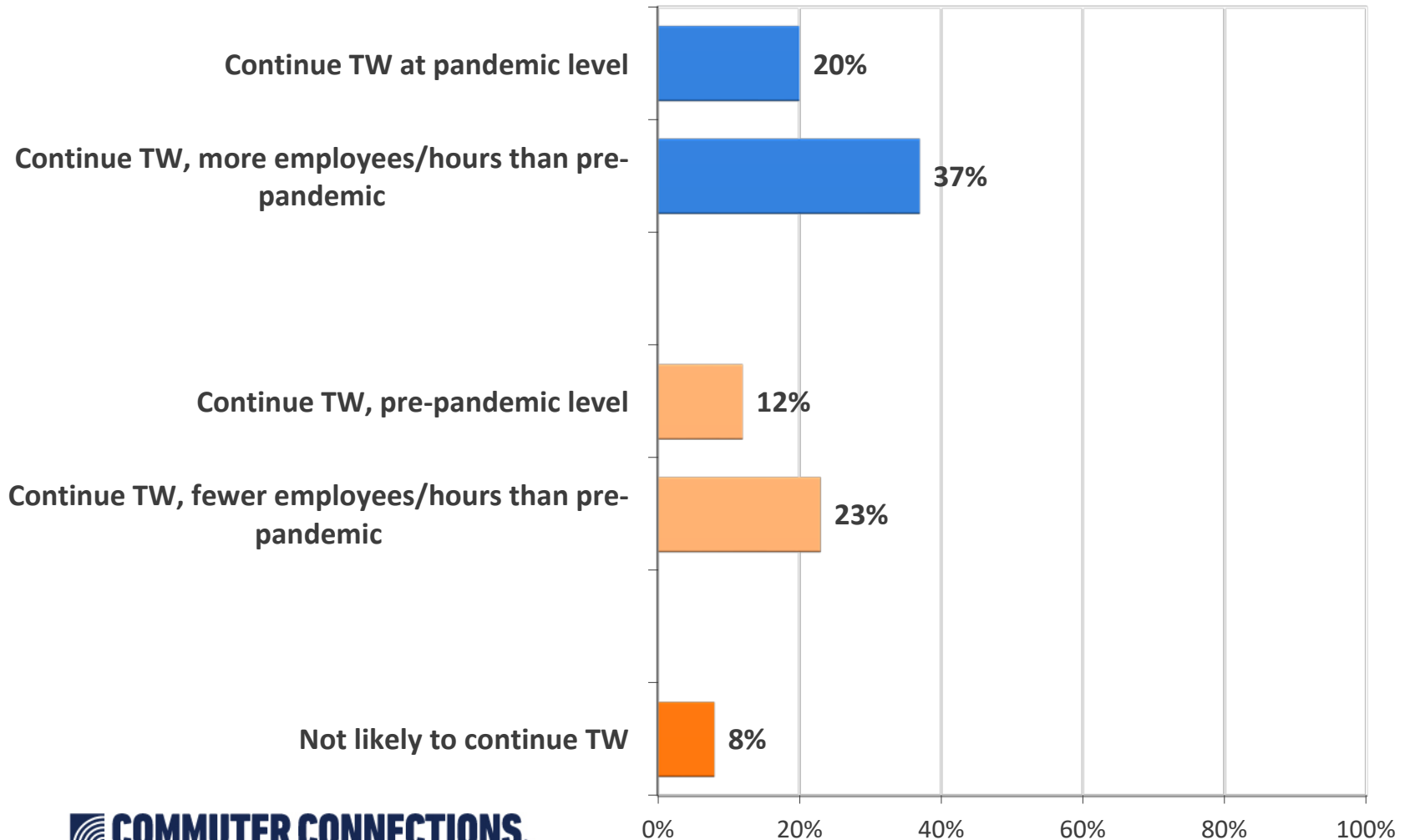
During the Pandemic, 14% of Worksites Developed a Formal Telework Program/Policy; 61% of Worksites Already Had a Formal Program/Policy before the Pandemic



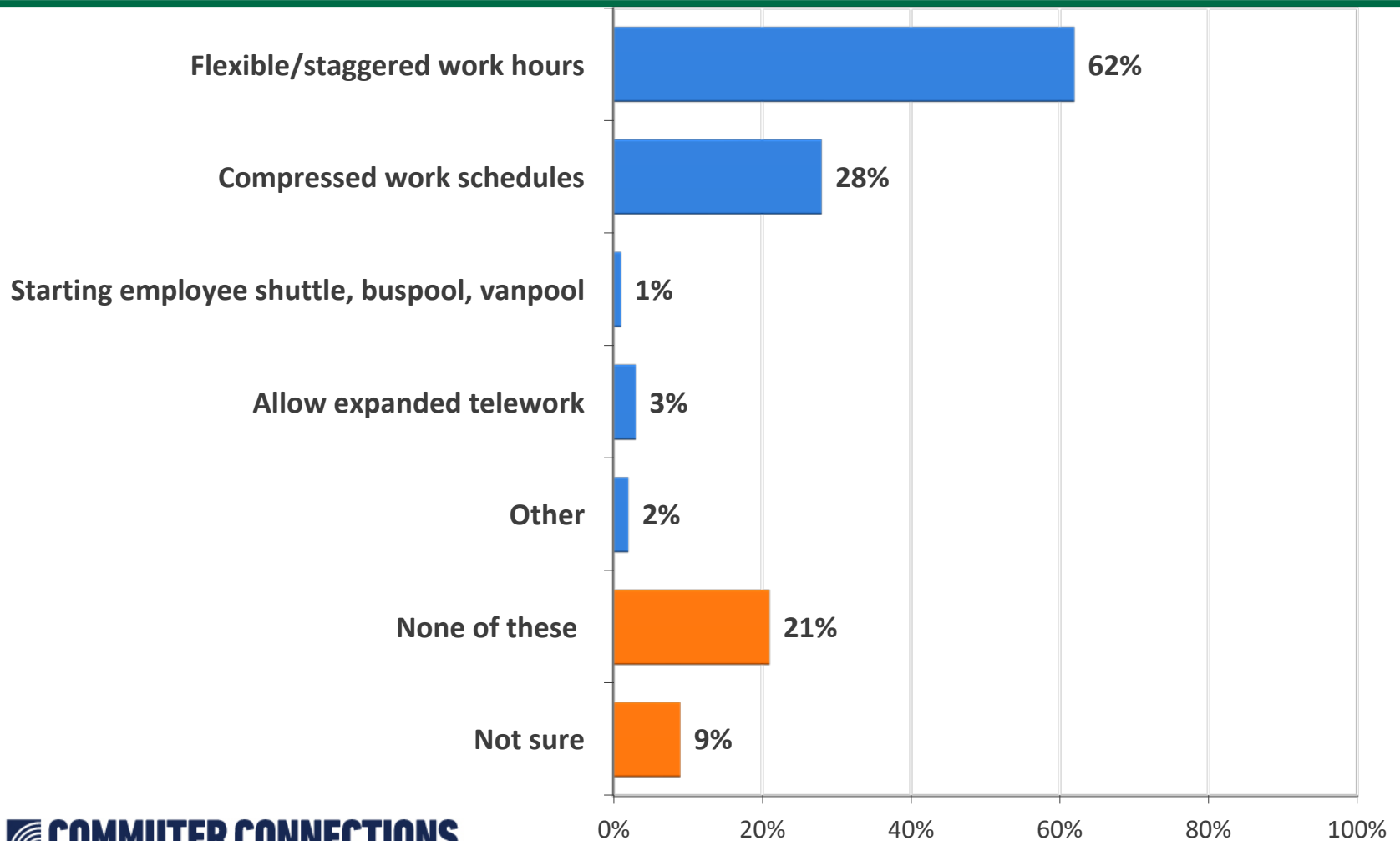
62% of Worksites With a Telework Program/Policy Made Changes to Accommodate the Pandemic – Most Made a Change to Expand Telework Eligibility



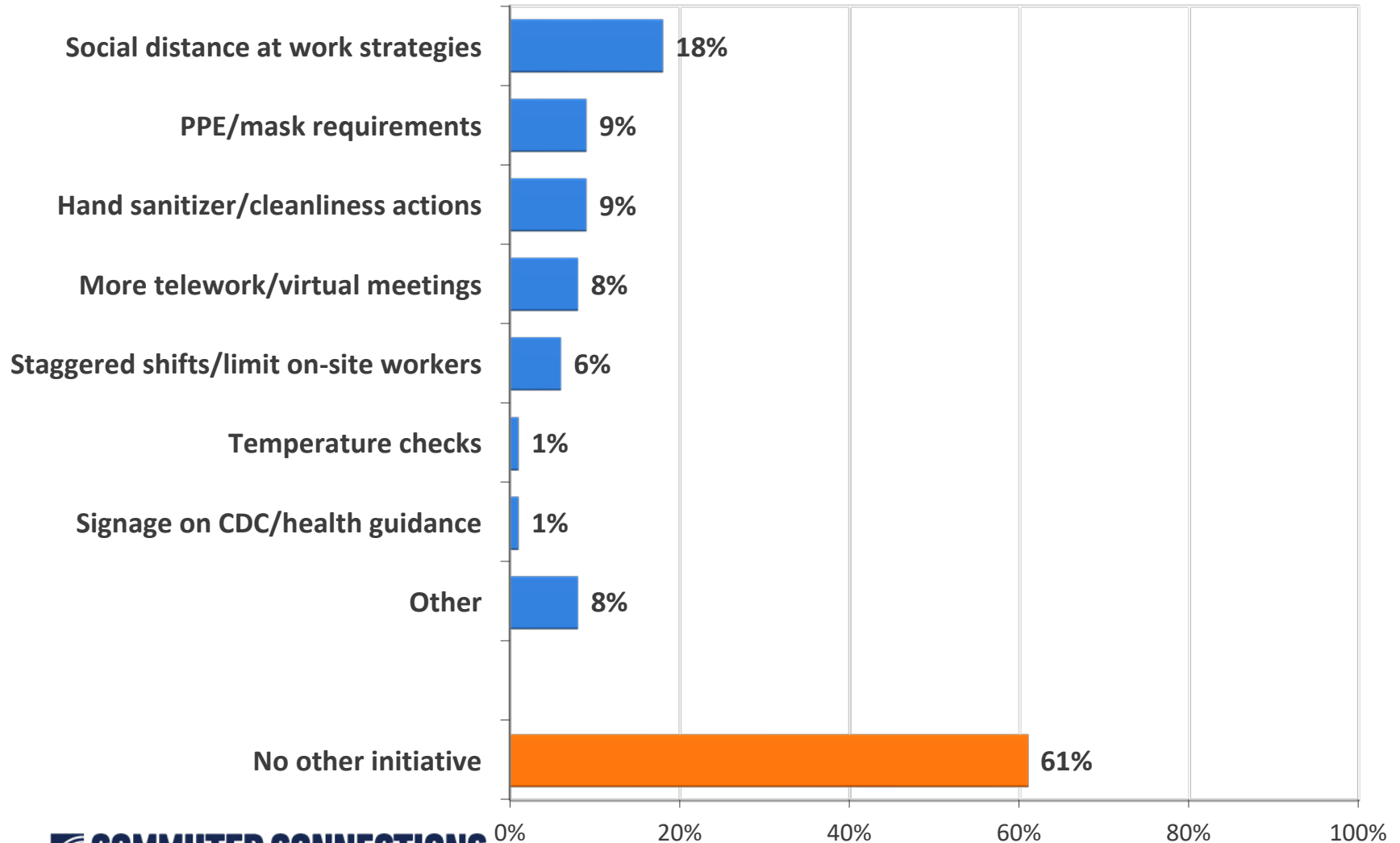
More than Half of Worksites Anticipate A Post-Pandemic Telework Level that is Higher Than the Pre-Pandemic Level



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

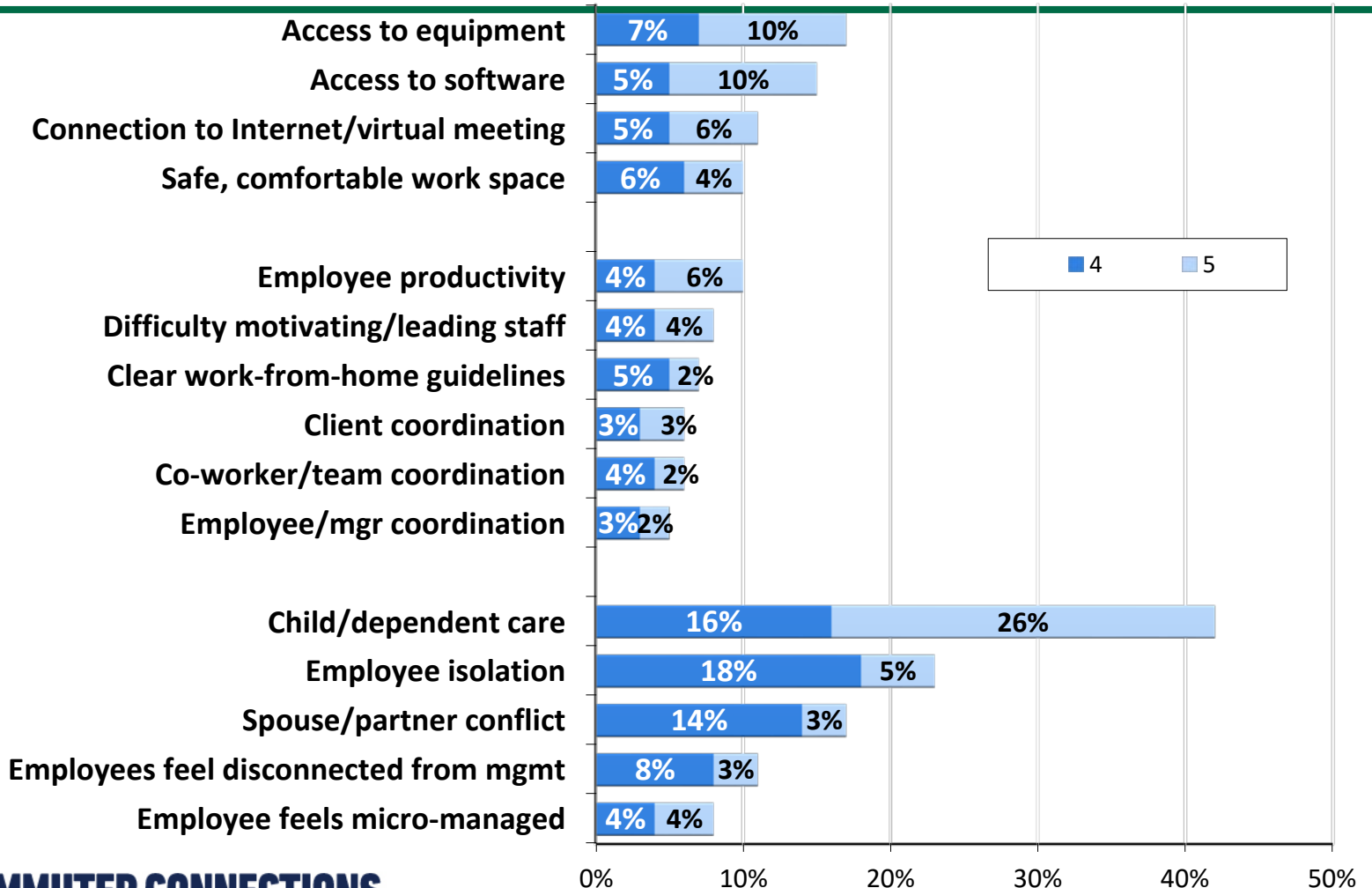


Employers Also Have Considered Implementing Other Virus-Prevention Strategies at the Worksite



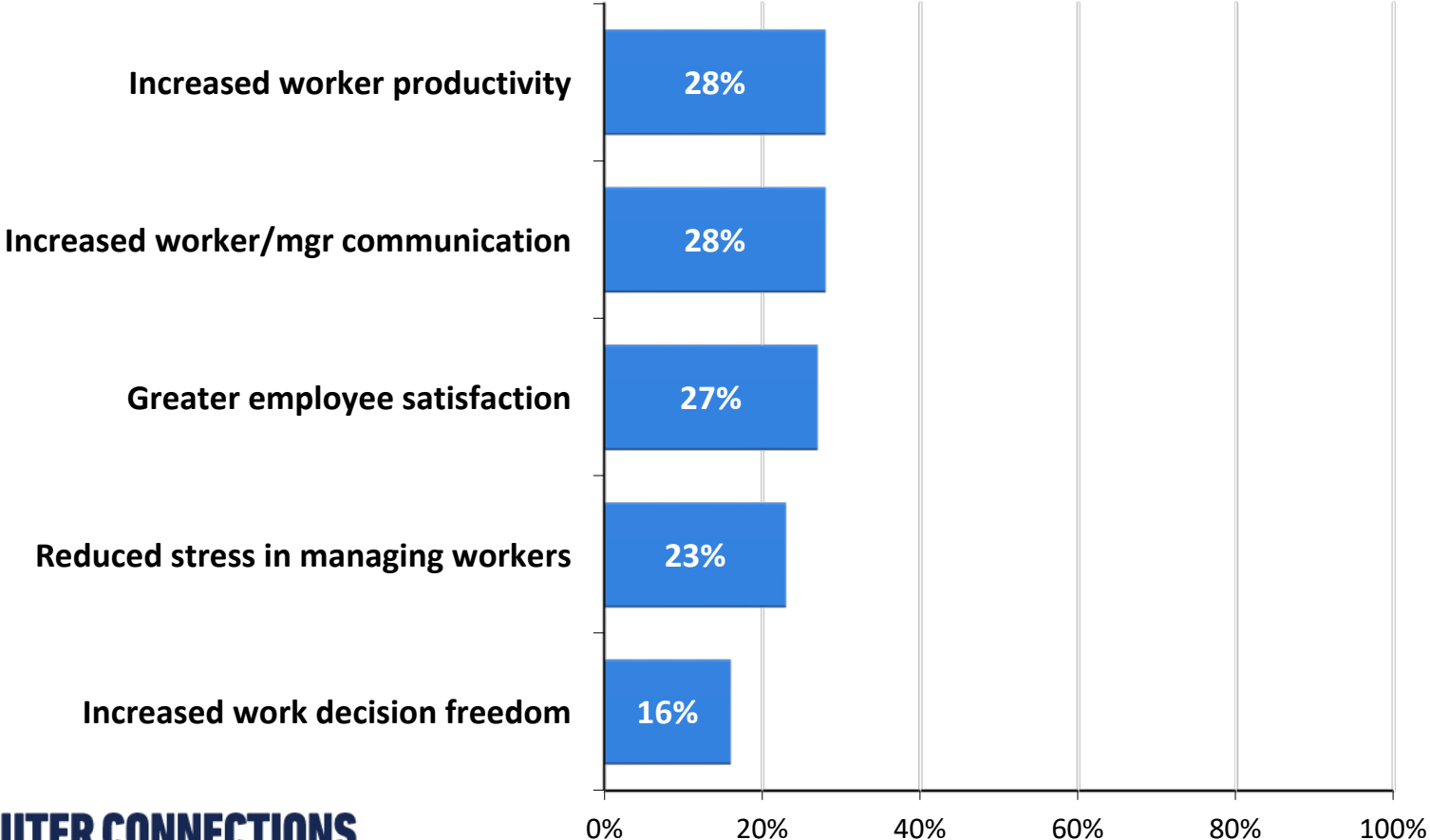
50% of Employers Noted A “Significant” TW Issue

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



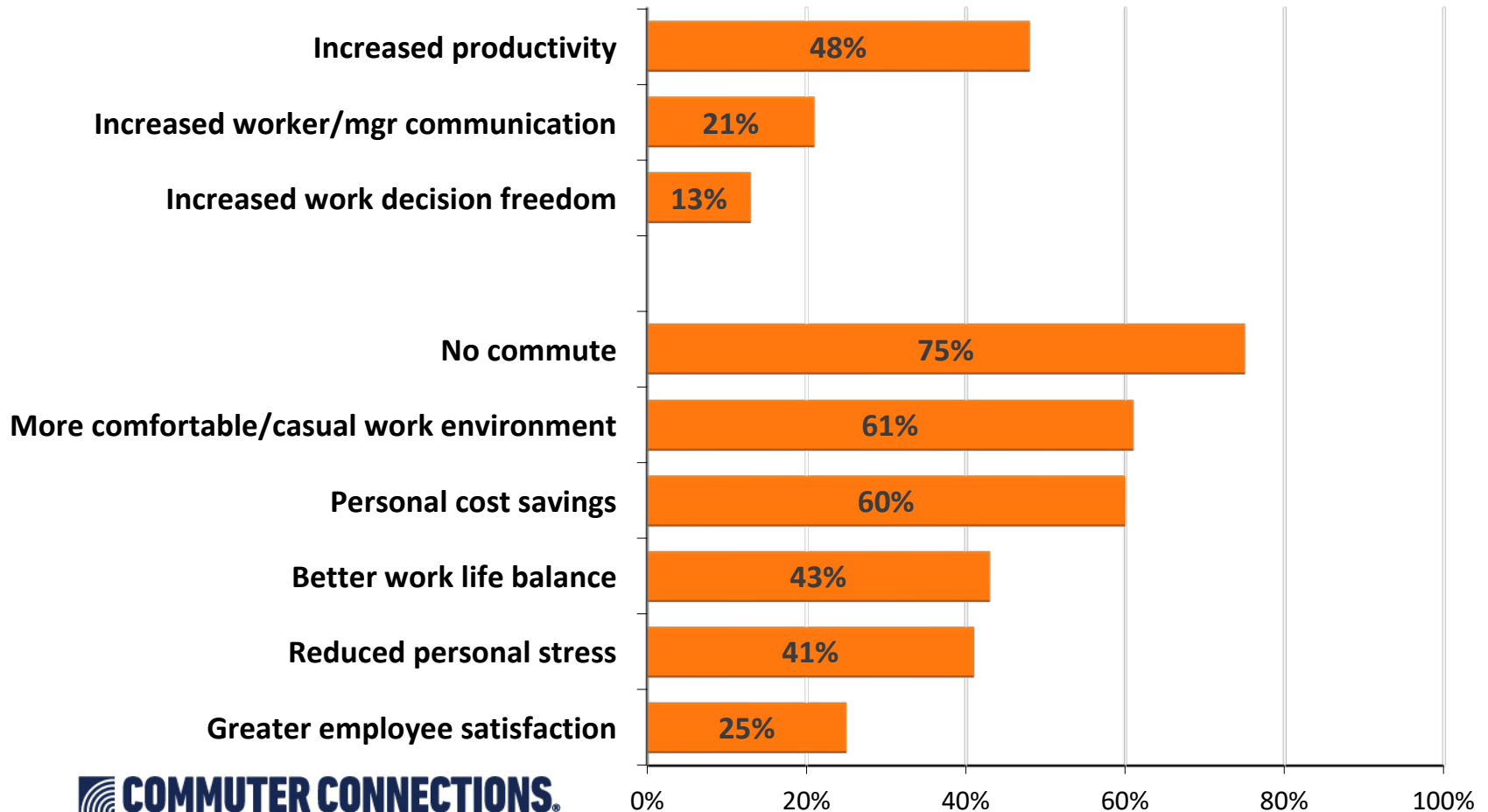
80% of Employers Said Managers Reported Benefits of Managing Remotely

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



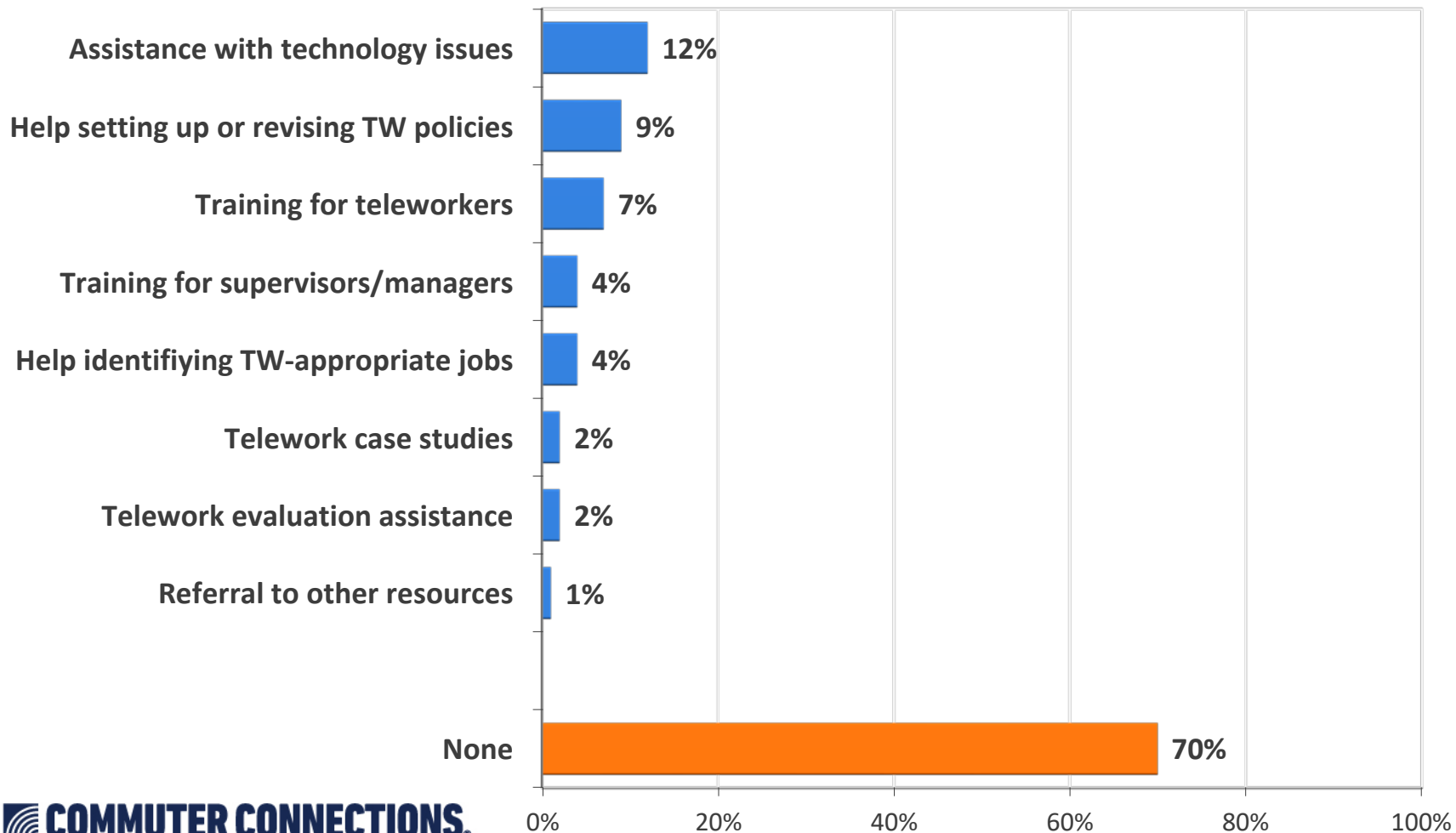
92% of Employers Said Employees Reported Benefits of Working From Home

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

- 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)

- 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)

- 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

commuterconnections.org

Metropolitan Washington Council of Governments

777 North Capitol Street NE, Suite 300

Washington, DC 20002

