

# Capital COVID-19 Survey:

## Planning for the Return to Worksites



# Methodology Details

## Audience



Employers of any size with worksites located in the Capital Region. *Respondents included C-suite-level leaders and decision makers involved in reopening plans and activities.*

## Geography



Capital Region  
(Washington, Baltimore, and Richmond metro areas)

## Data Collection



Online survey managed and hosted online by EY, under the supervision of EY research team. Responses were collected between **November 11, 2020 through December 11, 2020.**

## Sample

Survey respondents were sought from email subscriber lists from The Greater Washington Partnership and **twenty-four partner organizations** including top public transit agencies and local Chambers of Commerce.

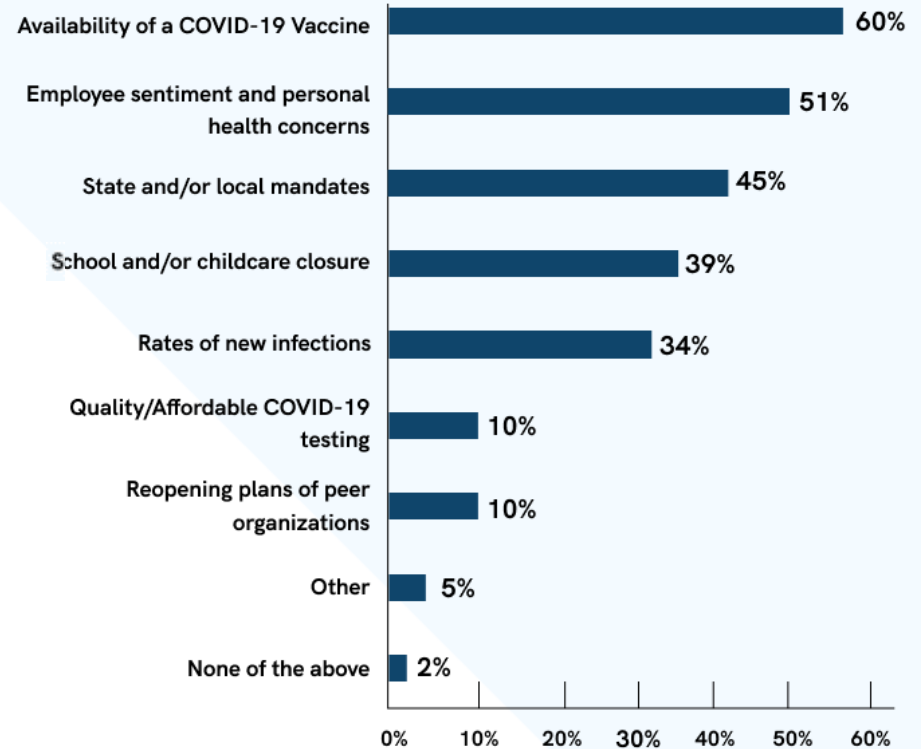
Responses from 172 employers from various industries are represented in the Covid-19 Winter survey. Together these organizations employ approximately 139,000 people in the Capital Region.

# VACCINE AVAILABILITY AND EMPLOYEE SENTIMENT ARE THE BIGGEST DRIVERS FOR DECISIONS REGARDING REOPENING



Vaccines, schools, and employee sentiment are driving reopening plans and decisions to bring employees back

## Biggest Driver for Decisions Regarding When to Bring Employees Back to Worksites

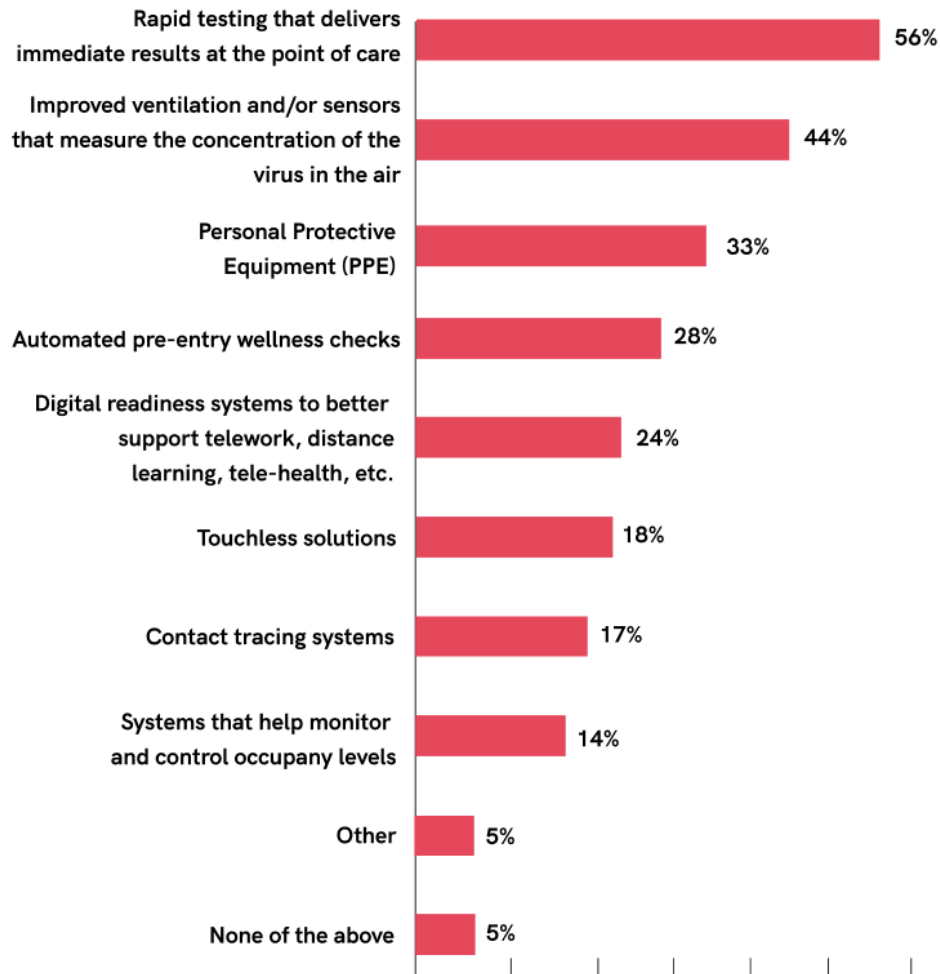


Q: Which of the following is the biggest driver for your organization's decisions regarding when to bring employees (and/or students, clients, etc.) back to worksites? (Please select up to 3)

# AVAILABILITY OF RAPID TESTING IS THE NUMBER ONE SOLUTION THAT WOULD MAKE WORKSITES MORE RESILIENT IN THE FACE OF PANDEMICS



## Solutions to Make Worksites More Resilient



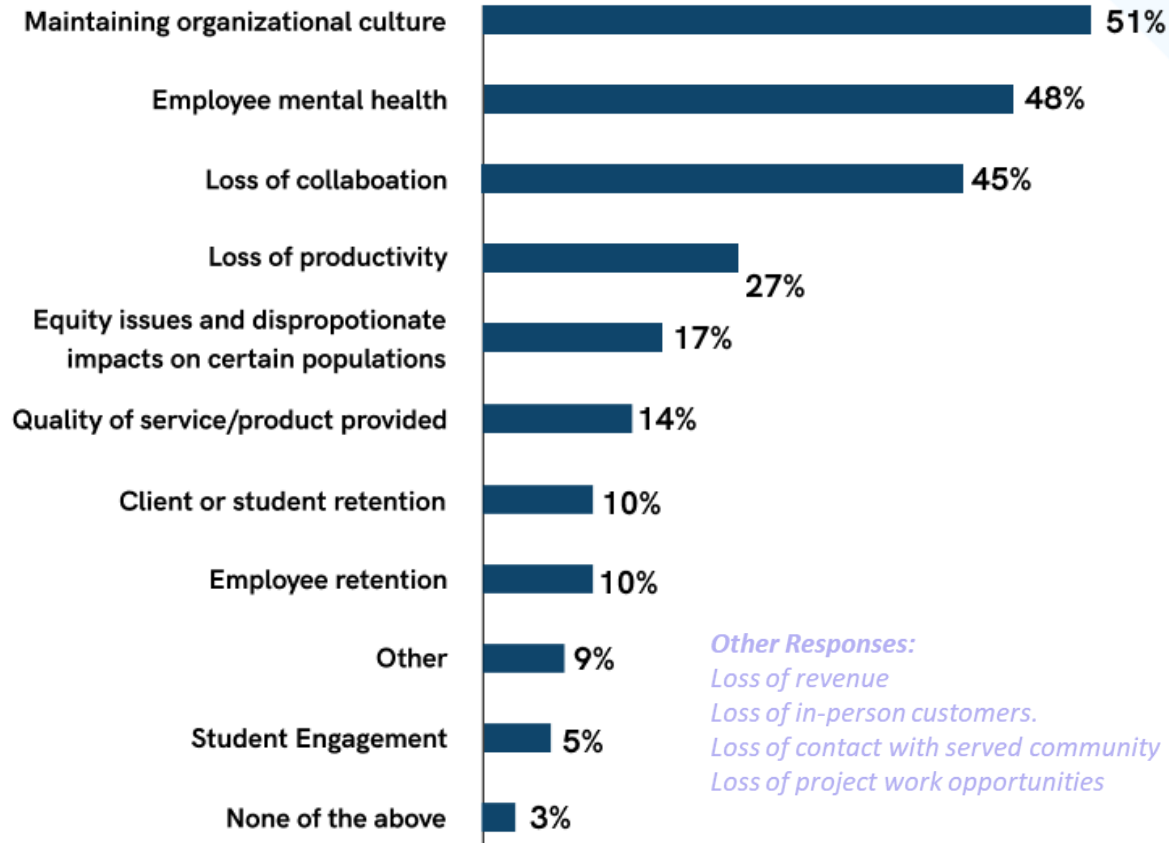
Most employers indicate that rapid testing and improved ventilation systems are the top solutions that can make workplaces safe in future pandemics.

*Q: Which of the following solutions would most help your worksite(s) be resilient in the face of pandemics? Please select up to 3.*

# SOCIAL CAPITAL AND EMPLOYEE MENTAL HEALTH ARE TOP CONCERNS FOR EMPLOYERS



## Most Concerning Ways COVID-19 Has Disrupted Workplaces



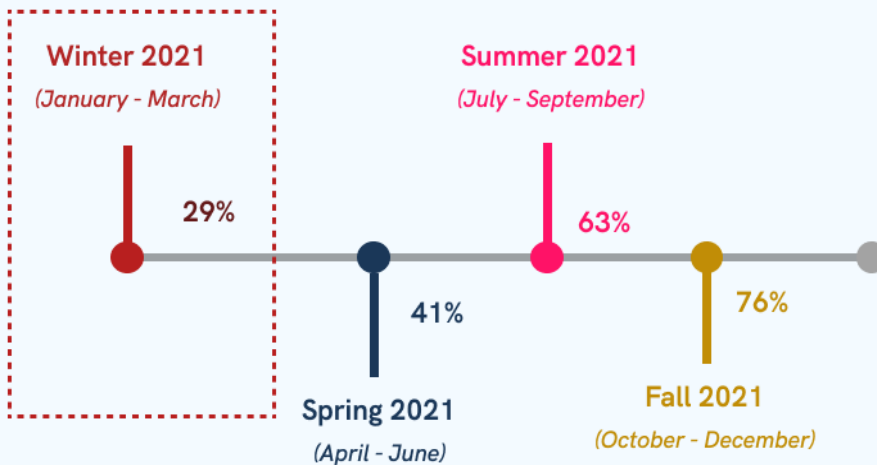
Close to half of the respondents rated employee mental health, loss of collaboration, and loss of organizational culture as top areas of concern for how the COVID pandemic is affecting their workforce.

Q: Thinking about how COVID may have disrupted your services and impacted interactions at the workplace, which of the following is MOST concerning to your organization? (Please select up to 3)

# WITH UNCONTROLLED SPREAD OF COVID-19, EMPLOYERS HAVE DELAYED THE PHASED RETURN TO THE WORKSITE



Share of Workforce Expected Onsite Over the Next Year (Results from Winter Snapshot)



**According to respondents, on average, 29% of their workforce is expected to be physically at their worksites in winter 2021 (January - March).**

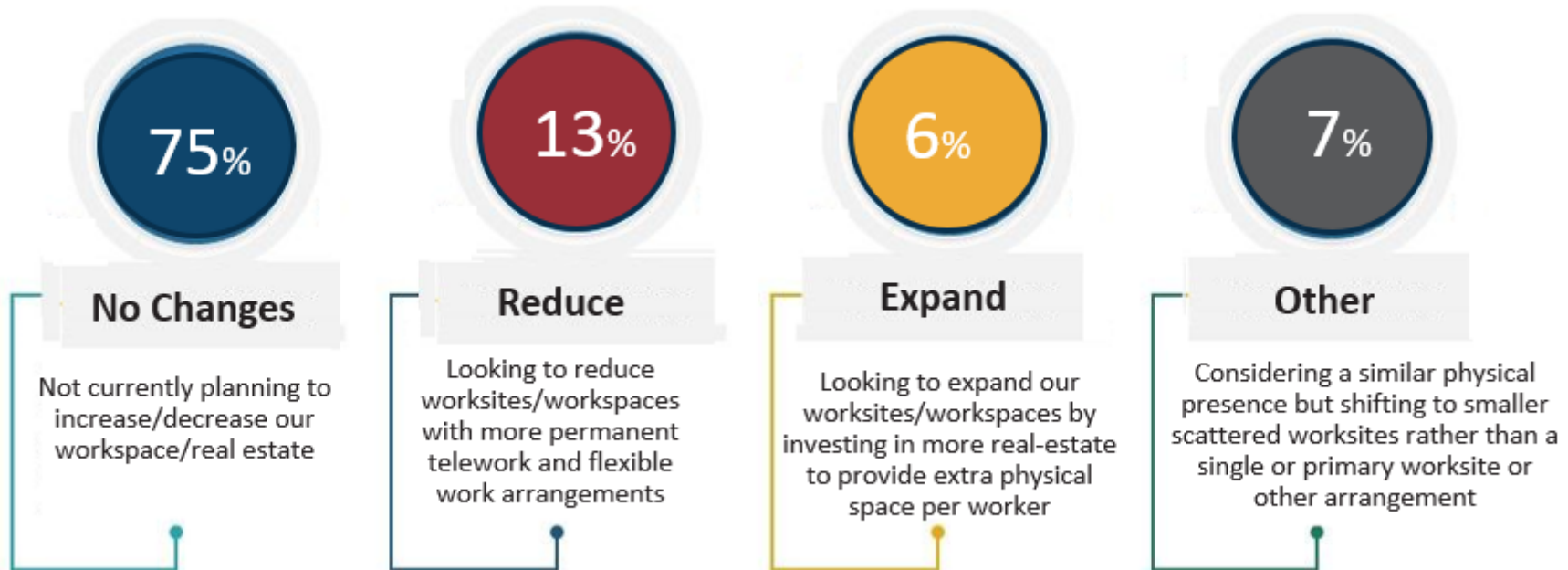
When asked in August, employers assumed 49% of their workforce would be on site during this same time period. Delayed plans to return to worksites reflect the course of the pandemic. As the number of those infected has increased over the past few months, employers' expected timelines for returning staff to worksites have shifted back.

*Q: As of today, what percentage of employees reporting to this location do you expect to be commuting to/from this location on a typical workday during the upcoming months?*

# 8 OUT OF 10 EMPLOYERS ARE NOT PLANNING TO MAKE CHANGES TO THEIR REAL-ESTATE / OFFICE FOOTPRINT



## EMPLOYERS' PLANS RELATED TO REAL-ESTATE PRESENCE IN THE NEXT 12 MONTHS



*Larger employers (1000+) are more likely (30%) to say they plan to reduce worksites/workspaces with more permanent telework and flexible work arrangements.*

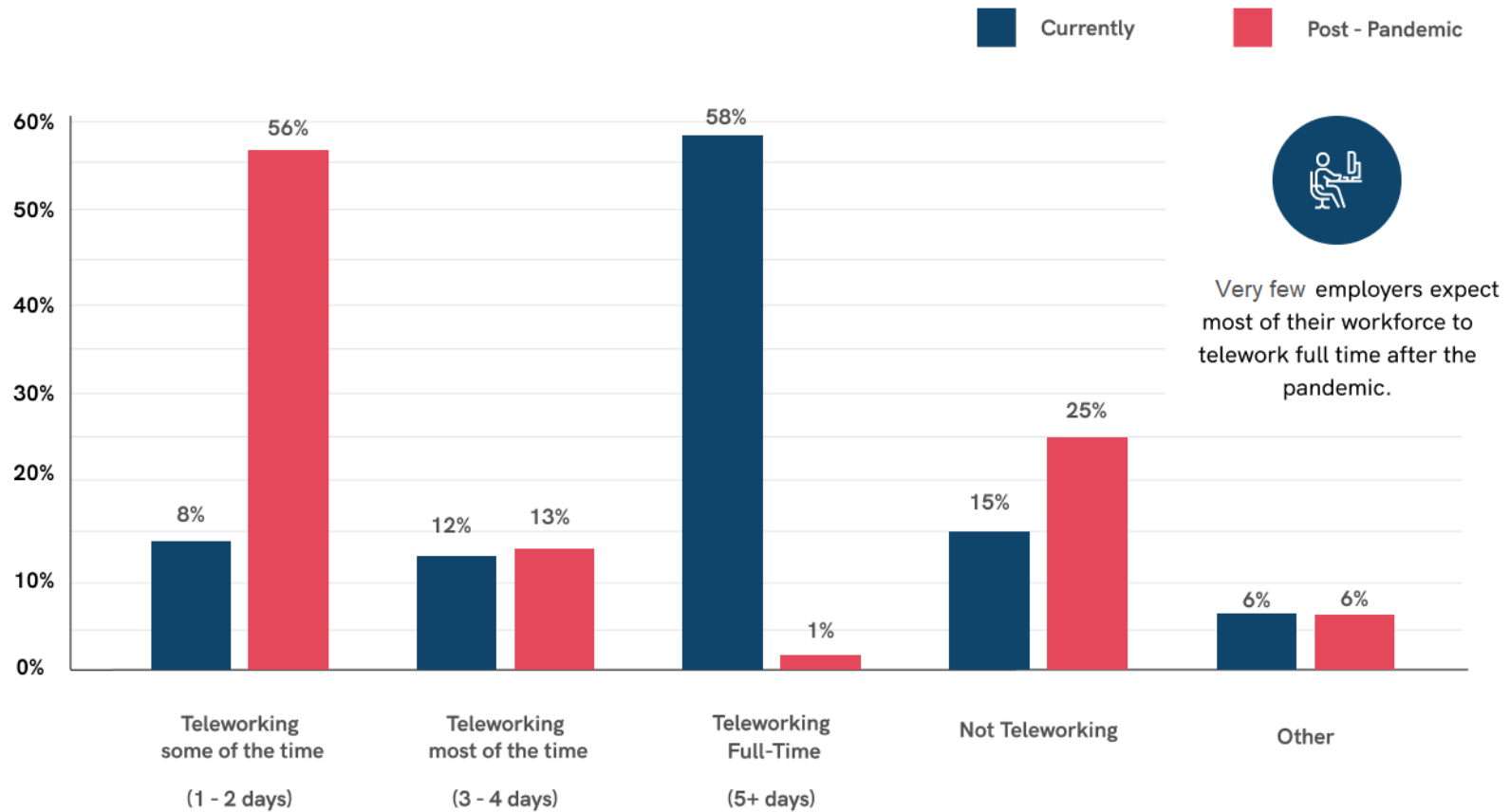
Q: Assuming the size of your workforce remains the same, which statement best describes your organization's plans for reducing/expanding worksites or workspace in the next 12 months:



# COVID IMPACT ON TELEWORKING

## TELEWORK SHARE POST COVID-19

Percentage of Employers Estimating Their Workforce Telework Practices



Q: Currently, most of my organization's employees are...

Q: After the COVID-19 pandemic, I anticipate most of my organization's employees will...

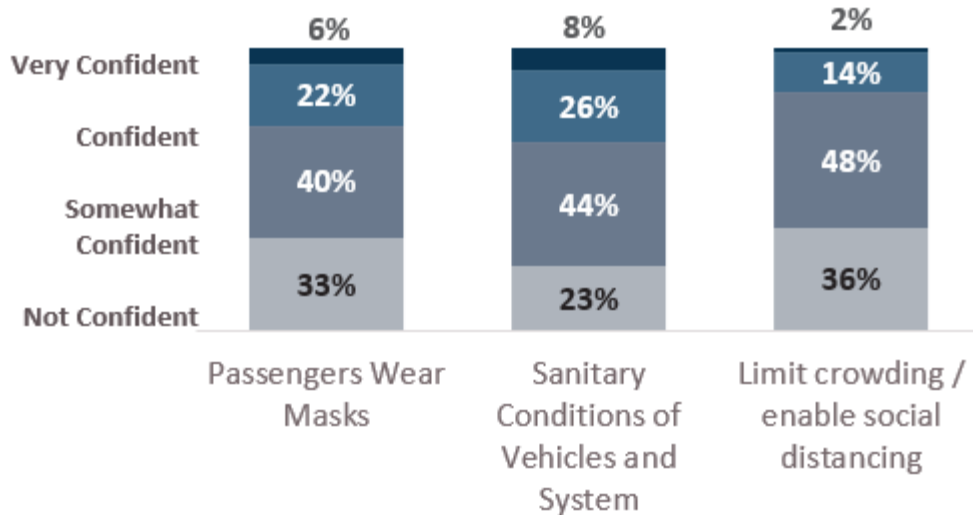




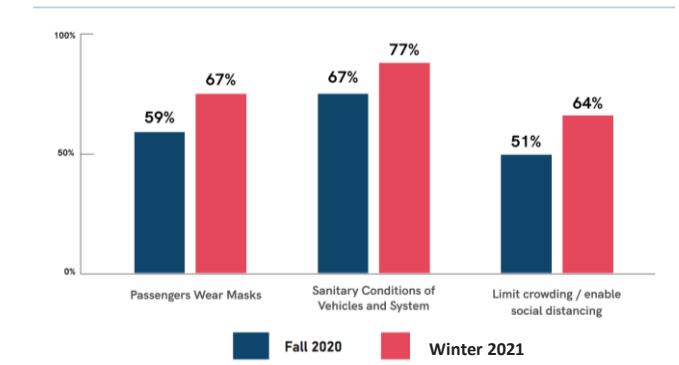
# CONFIDENCE IN PUBLIC TRANSIT IS GRADUALLY IMPROVING

*% of Respondents – Employer Confidence in Local Transit Agencies Ability To Ensure The Following -*

**Winter 2020**



*% of Respondents at Least “Somewhat Confident”*



The level of confidence in transit agencies’ ability to provide safe transportation, limit crowding, ensure passengers wear masks, and provide sanitary vehicles has grown since August.

Q: How confident is your organization that local transit agencies will be able to ensure the following:

# GYMS, RESTAURANTS, PUBLIC TRANSIT, AND ARENAS ARE SEEN AS HIGHER-RISK AREAS FOR COVID-19 TRANSMISSION



## Perceived Risk of COVID-19 Transmission – Most Concerning Venues Employer Rankings



*Fear of Transmission  
still shaping perceptions*

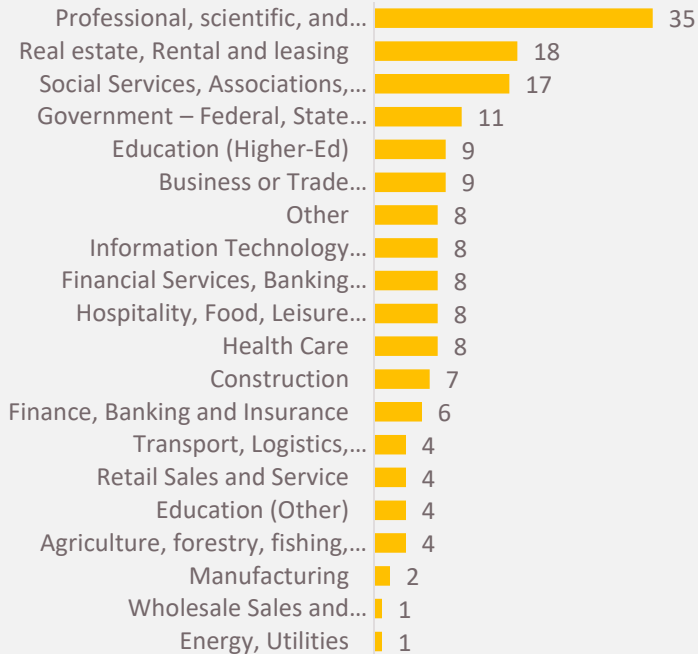
Q: Rank the following venues in terms of perceived risk of COVID-19 transmission from 1 - most concerning to 6 – least concerning:”



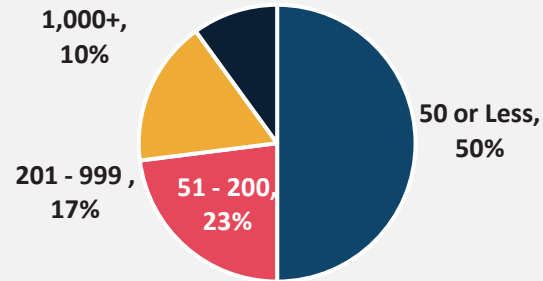
# Respondent Information

172 unique employers in more than 20 industry sectors across all three Metro Areas (Washington, Baltimore and Richmond) in the Capital Region responded to the survey.

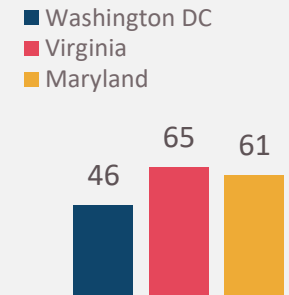
## Industry Type



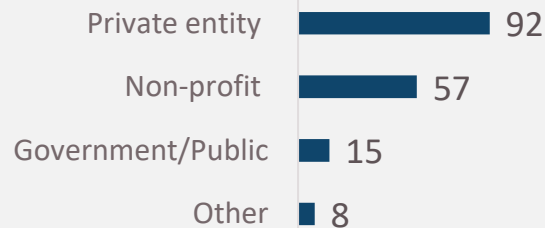
## ORGANIZATION SIZE (% of Responses)



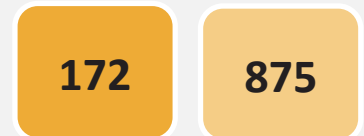
## Primary Location



## Organization Type (Number of Responses)



## Employers Number of Sites\*



\*Please note, 64 organizations listed having multiple sites in the Capital Regions; a third indicated that not all sites follow the same work policies. Survey responses are not meant to represent policies in those sites.