Commuter Connections
2020 Employer Telework Survey
Coronavirus Pandemic

Highlight Results
July 21, 2020

LDA Consulting
with
CIC Research
Survey Methodology
Survey Objectives and Methodology

- Survey conducted to examine telework changes made by employers during coronavirus pandemic
- Interviewed 180 employers that were in either COG/CC ACT! database or federal ETC/TW coordinator database
- Sent email/postal mail invitations, Internet survey:
  - Collected data on:
    - Employer size, location, type
    - Change in worksite operation
    - TW counts now and pre-coronavirus pandemic
    - Changes in TW program/policy
    - Received assistance on TW – types and sources
    - TW issues encountered
    - TW benefits to employees and managers
    - Likely to continue TW after pandemic
Employer Profile – Diverse Sample

- Worksite state: 12% DC, 43% MD, 45% VA
- Employer type: 49% private, 33% NFP, 13% Federal, 5% S/L gvt
- 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

- 1-25 employees: 23%
- 26-50 employees: 14%
- 51-100 employees: 16%
- 101-250 employees: 19%
- 251-999 employees: 14%
- 1000 or more employees: 14%
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

Q2d. Since the coronavirus pandemic began, have any of your organization’s worksites in the Washington metropolitan region shut down or reduced on-site employee operations, even if only temporarily?

Q2e. Have these Washington region worksites now reopened for all employees to work on-site as usual?
97% of Worksites Had At Least Some Telework Since Pandemic Began – For 55%, It was Full-time for All Employees

Q2f. Since the coronavirus pandemic began, have any of your organization's Washington metropolitan region employees teleworked (or worked at home), some or all of their workdays?

n = 180

- All employees TW all workdays, 55%
- All employees TW, some workdays, 11%
- Some employees TW, but some worked at usual location, 31%
- No TW at all, 3%
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

Q2g. About how many of these employees are teleworking/working at home now, some or all of their workdays?

Q2h. BEFORE the coronavirus pandemic began, about how many of your Washington region employees teleworked/worked at home some or all of their workdays?
During the Pandemic, 14% of Worksites Developed a Formal Telework Program/Policy; 61% of Worksites Already Had a Formal Program/Policy before the Pandemic

Q2k. Did your organization have a formal telework program or policy in place before the coronavirus pandemic?
Q2m. Does your organization have a formal telework program or policy in place now? (if no formal TW program/policy before)
62% of Worksites With a Telework Program/Policy Made Changes to Accommodate the Pandemic – Most Made a Change to Expand Telework Eligibility

Q2k. Did your organization have a formal telework program or policy in place before the coronavirus pandemic?
Q2m. Does your organization have a formal telework program or policy in place now? (if no formal TW program/policy before)

- Allowed more employees to TW/eased restrictions on who could TW: 46%
- Increased hours/days employees could TW: 5%
- Other TW changes: 11%
- No changes/not sure: 38%

n = 102
More than Half of Worksites Anticipate A Post-Pandemic Telework Level that is **Higher** Than the Pre-Pandemic Level

Q3. Which of the following telework/work at home scenarios is most likely for your worksite after Stay at Home restrictions are lifted and employees can return to their usual jobs and workplaces?

- Continue TW at pandemic level: 20%
- Continue TW, more employees/hours than pre-pandemic: 37%
- Continue TW, pre-pandemic level: 12%
- Continue TW, fewer employees/hours than pre-pandemic: 23%
- Not likely to continue TW: 8%

n = 152
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

Q3a. Has your organization considered or discussed implementing any of the following work hours or commute travel scenarios after the Stay at Home restrictions are lifted to reduce the spread of future virus outbreaks?

- Flexible/staggered work hours: 62%
- Compressed work schedules: 28%
- Starting employee shuttle, buspool, vanpool: 1%
- Allow expanded telework: 3%
- Other: 2%
- None of these: 21%
- Not sure: 9%

n = 180
Employers Also Have Considered Implementing Other Virus-Prevention Strategies at the Worksite

Q3b. Has your organization considered or discussed implementing any other transportation, work space, or work place initiatives to reduce the spread of future virus outbreaks? If so, please describe.
Telework Issues and Benefits
50% of Employers Noted A “Significant” TW Issue
Few Reported Technical and Coordination Issues; They Reported Greater Issues with Employees’ Experience with Telework

Q11a. During the coronavirus pandemic, how significant have the following problems or issues been for your employees or managers in teleworking or implementing/supporting telework?

- Access to equipment: 7% (4) vs. 10% (5)
- Access to software: 5% (4) vs. 10% (5)
- Connection to Internet/virtual meeting: 5% (4) vs. 6% (5)
- Safe, comfortable work space: 6% (4) vs. 4% (5)
- Employee productivity: 4% (4) vs. 6% (5)
- Difficulty motivating/leading staff: 4% (4) vs. 4% (5)
- Clear work-from-home guidelines: 5% (4) vs. 2% (5)
- Client coordination: 3% (4) vs. 3% (5)
- Co-worker/team coordination: 4% (4) vs. 2% (5)
- Employee/mgr coordination: 3% (4) vs. 2% (5)
- Child/dependent care: 16% (4) vs. 26% (5)
- Employee isolation: 18% (4) vs. 5% (5)
- Spouse/partner conflict: 14% (4) vs. 3% (5)
- Employees feel disconnected from mgmt: 8% (4) vs. 3% (5)
- Employee feels micro-managed: 4% (4) vs. 4% (5)

n = varies from 109 to 150
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.

- Increased worker productivity: 28%
- Increased worker/mgr communication: 28%
- Greater employee satisfaction: 27%
- Reduced stress in managing workers: 23%
- Increased work decision freedom: 16%

Q12a. What benefits, if any, have managers shared about their experience managing remotely?
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

- Increased productivity: 48%
- Increased worker/mgr communication: 21%
- Increased work decision freedom: 13%
- No commute: 75%
- More comfortable/casual work environment: 61%
- Personal cost savings: 60%
- Better work life balance: 43%
- Reduced personal stress: 41%
- Greater employee satisfaction: 25%

Q12. What benefits, if any, have your employees shared about their experience teleworking or working from home?
Three in Ten Organizations Had Received Some Telework Information or Assistance

Half Who Received Assistance Named an Internal or Corporate Source

Q3c. Have you or others in your organization sought or received/obtained any information or assistance to help you set up teleworking for your employees?
Q3d. What telework information or assistance did you receive?
Q3e. From what sources did you receive that information or assistance?
Questions?

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