

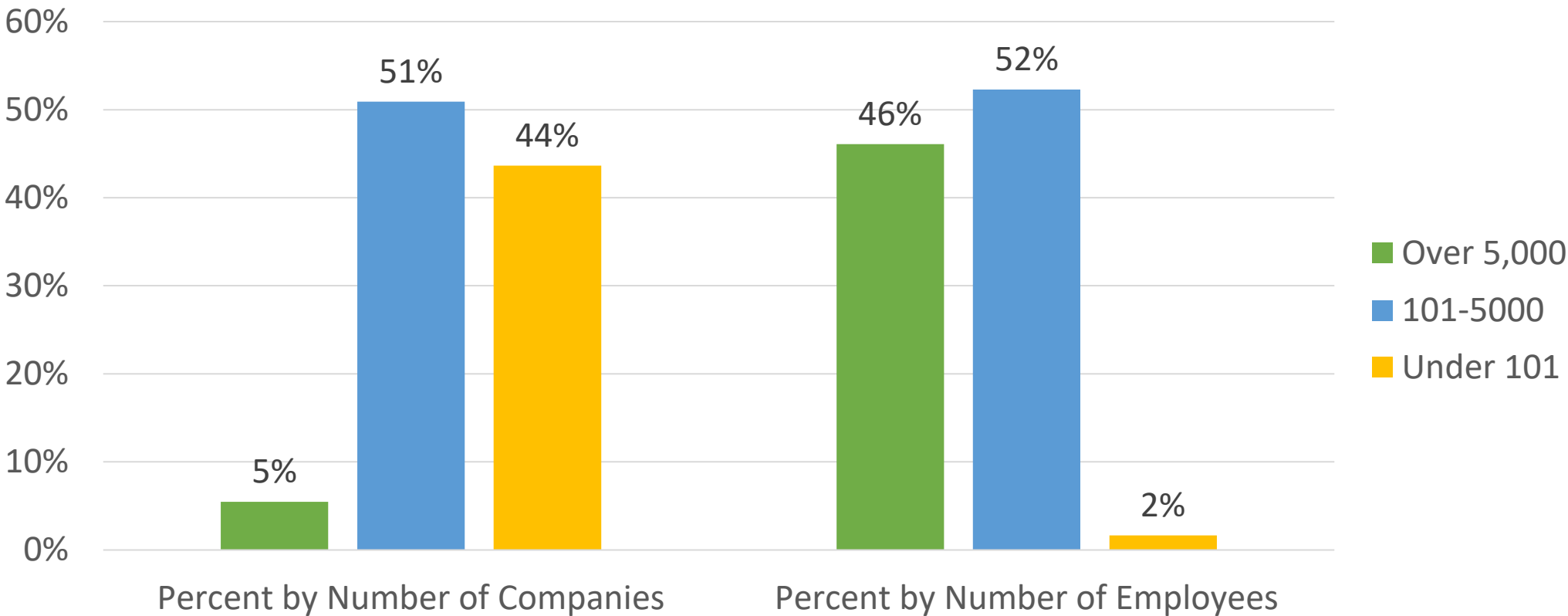
100 Business Survey “COVID-19 Remote Work”

June 22, 2021

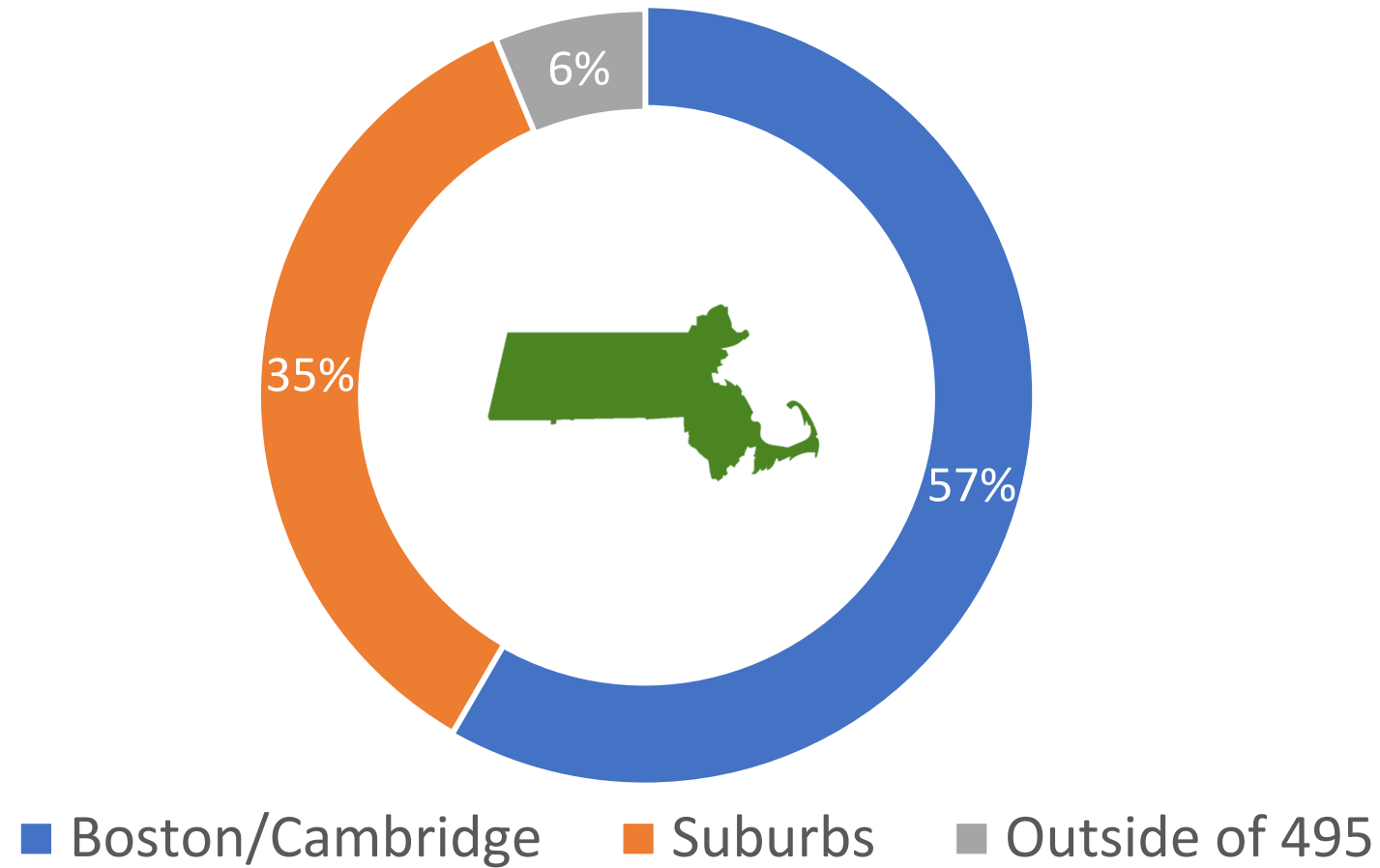
110 companies

Representing 113,505 employees in MA

- 52,322 employees are from 6 companies with over 5,000 employees
- 59,334 employees are from 56 companies with between 101 and 5,000 employees
- 1,849 employees are from 48 companies with under 101 employees



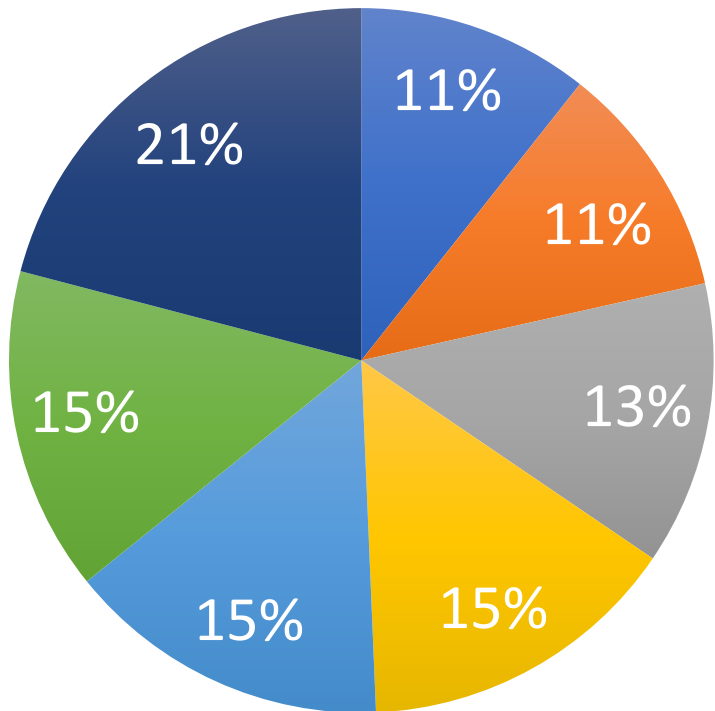
Respondent Locations



17 companies did not respond or disclosed uncertainty in employee location - representing less than 2% of total employees

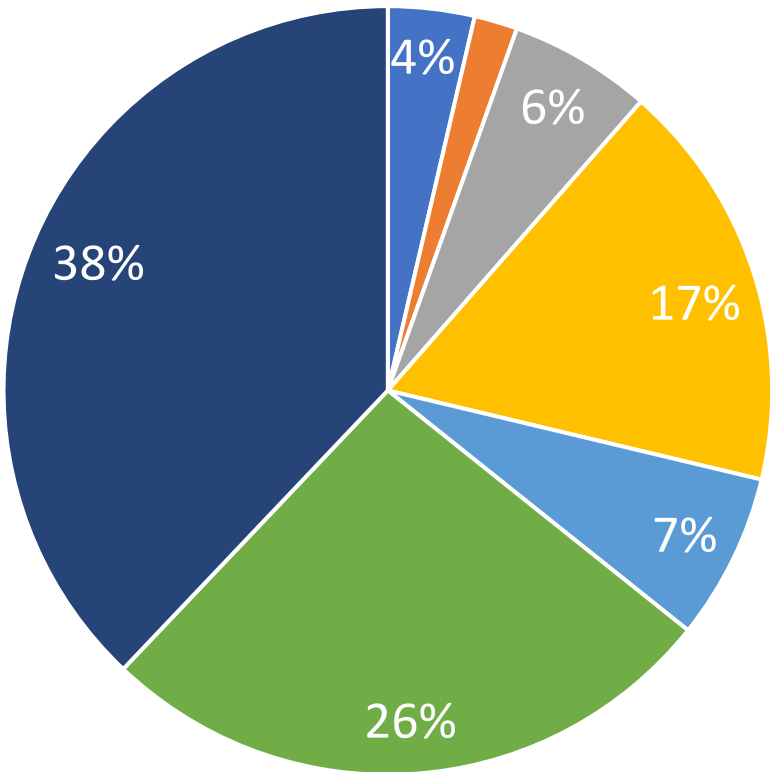
Industries Represented

By Employees Represented



- Educational Services
- Finance and Insurance
- Manufacturing
- All Other

By Companies Represented

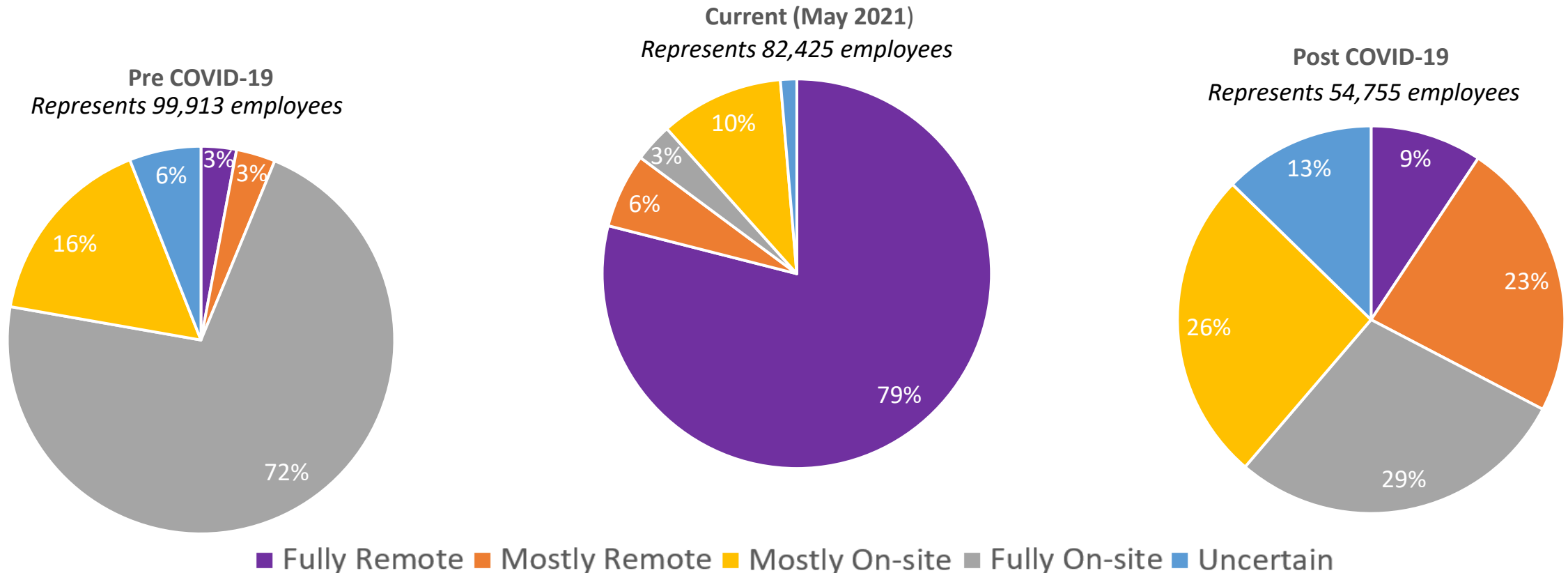


- Retail Trade
- Other Services, except Public Administration
- Professional, Scientific, and Technical Services

The Current State of Work Compared to Pre and Post Pandemic

5

- Employers report that **6% of their workforce** was either **fully or mostly remote pre-pandemic**.
 - Currently, **85% of employees are fully or mostly remote**.
- Companies anticipate that **32% of employees will be fully or mostly remote post pandemic**.

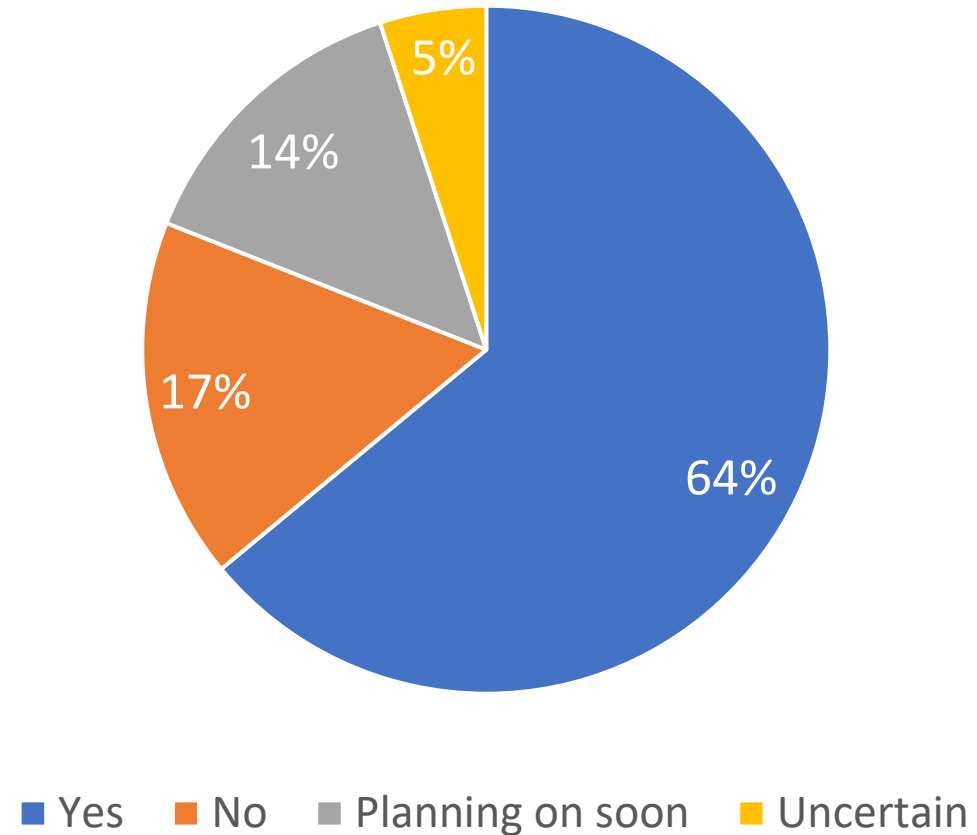


"Mostly Remote" = remote 3+ days a week; "Mostly On-site" = on-site 3-4 days a week

Employers Are Seeking Input from Employees on the Future of Work

The majority (78%) of respondents have either already surveyed (64%) their employees about their needs or preferences for returning to on-site work or are planning on surveying their employees soon (14%).

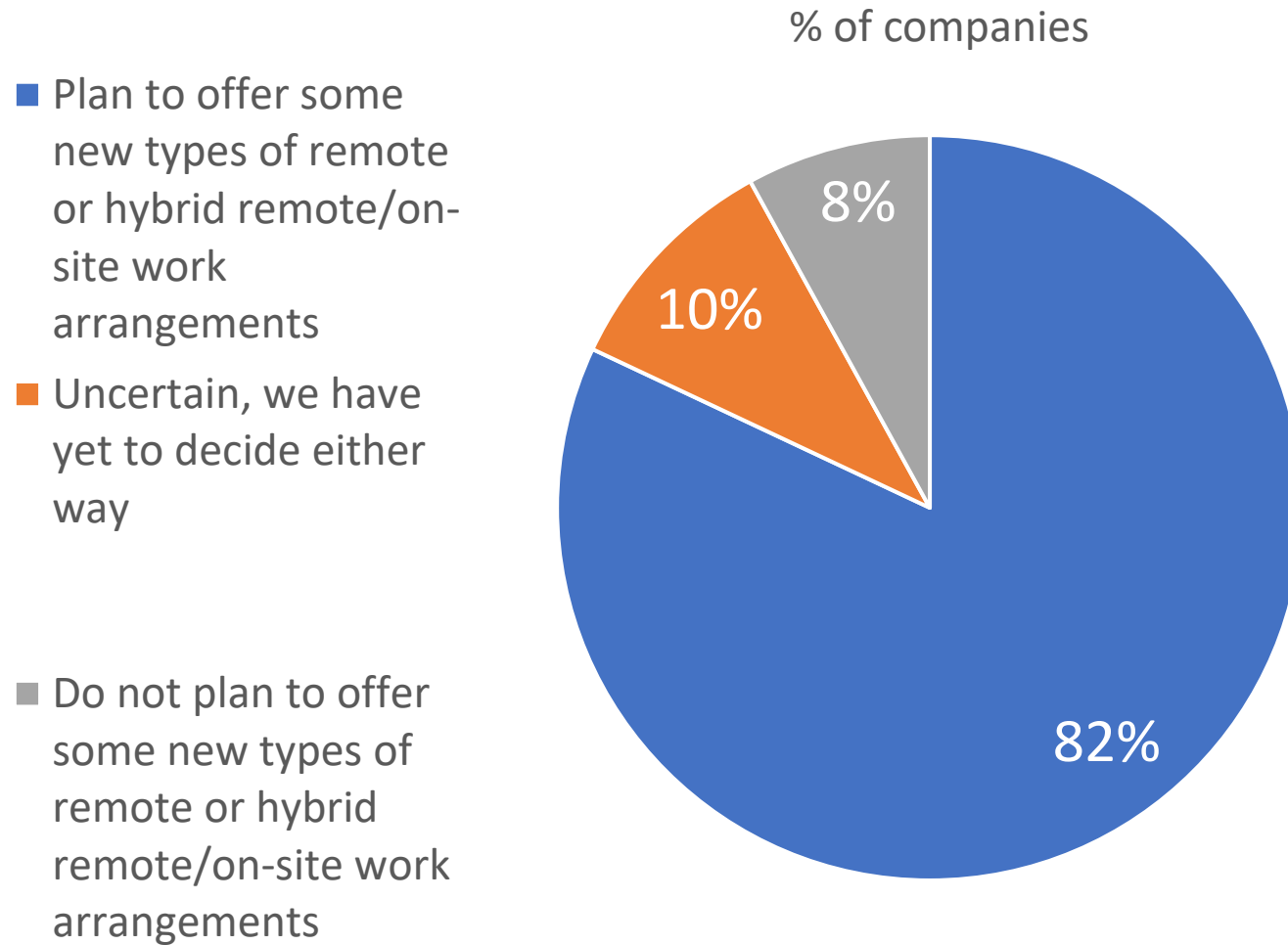
% of Companies Surveying Employees



2% of respondents did not answer

Employer Plans to Offer Remote or Hybrid Models of Work

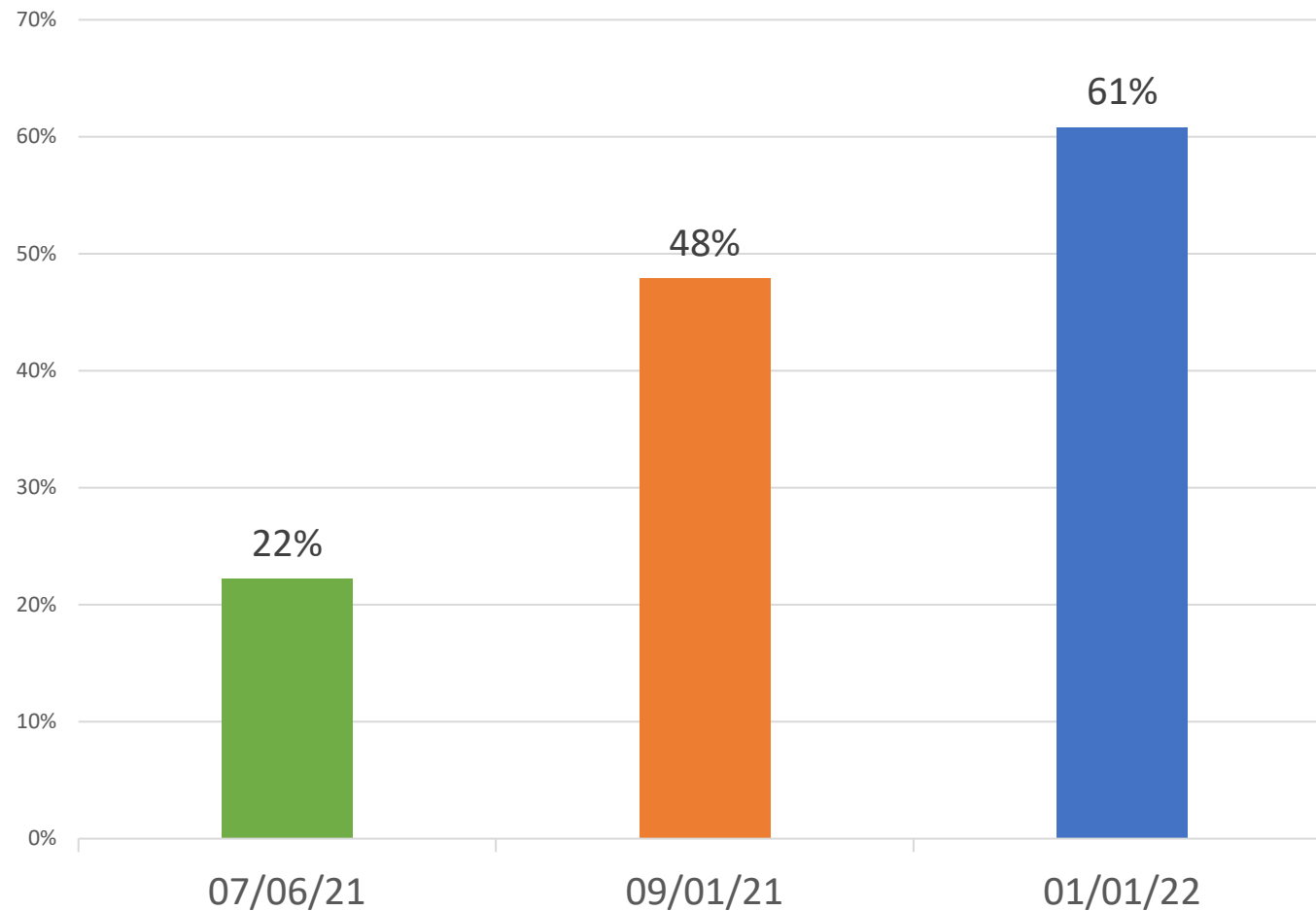
7



- The majority (**82%**) of companies plan to offer either fully remote or hybrid work arrangements.
- Only **8%** of companies do not plan to offer new types of remote or hybrid arrangements.

Employer Projections of When Remote Employees Will Be Back On-Site

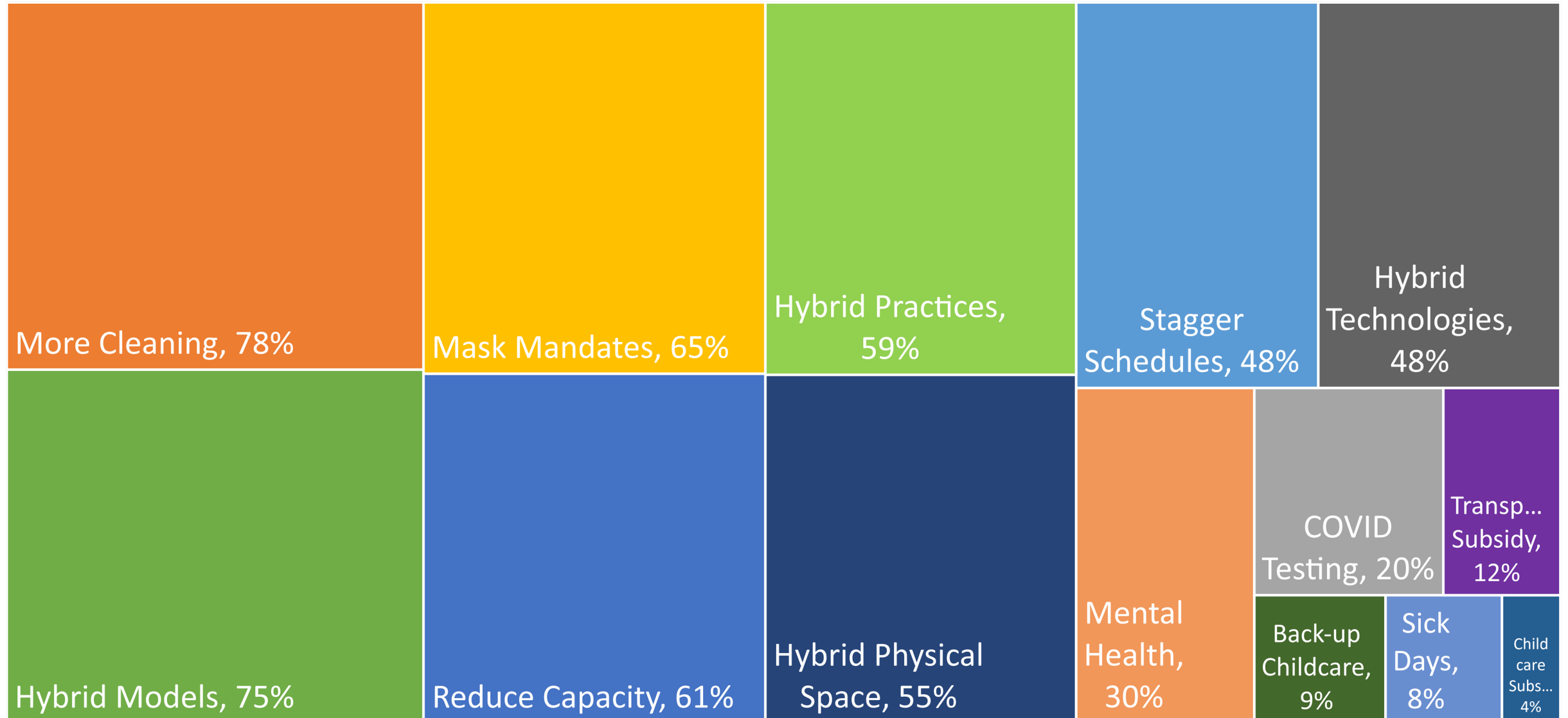
48% of employees are expected to be at least partially back on-site by September and **61%** by the end of the year.



Note: Survey results were collected prior to announcement of the lift of the COVID emergency order on June 15th – after the announcement, participants who provided contact information were asked if they would like to amend their answers to this question: 17% of respondents replied (and their updated replies are reflected in this data)

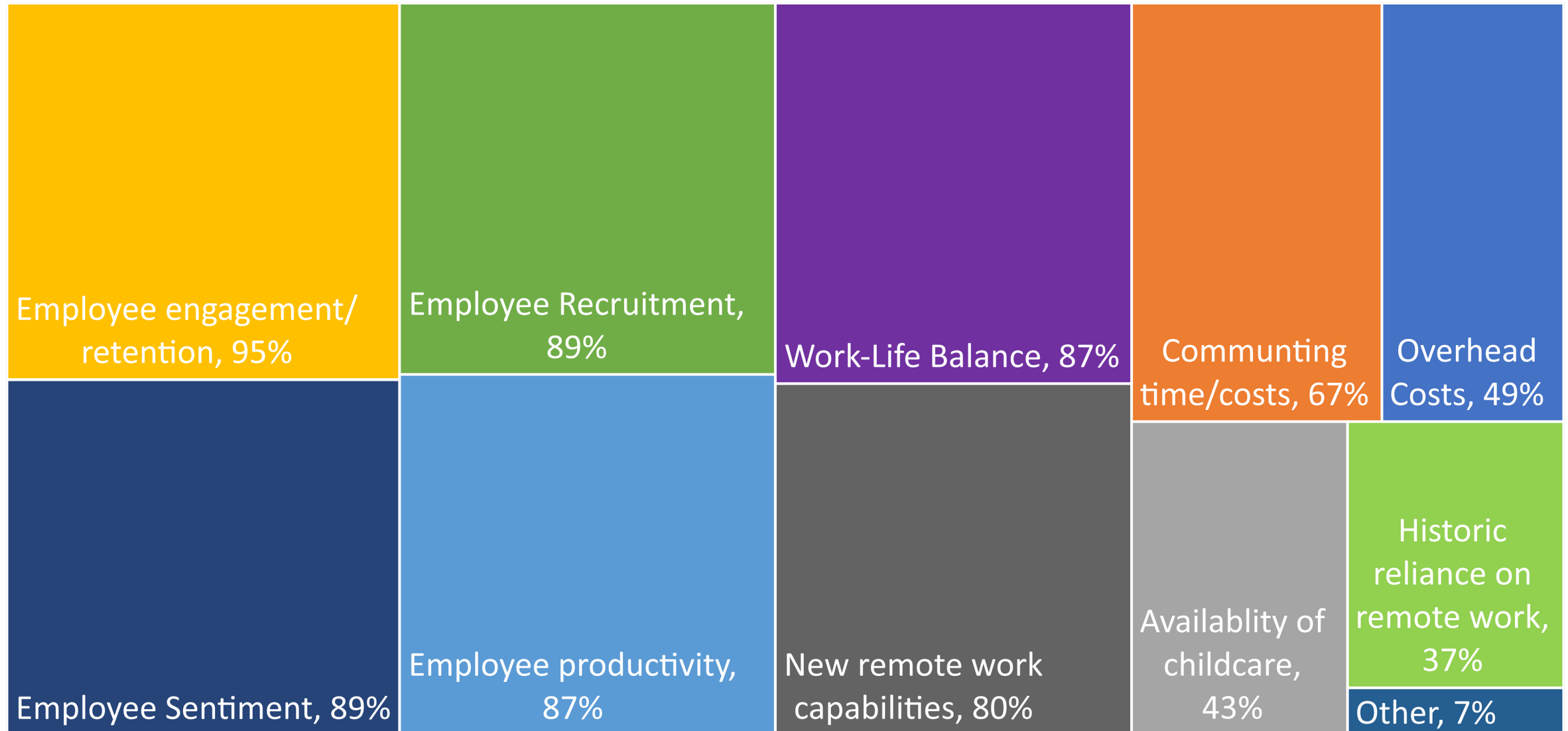
Measures Employers are Considering for Post-Pandemic Return-to-Work

9



% reflects employers that selected the measure; employers could select more than one option

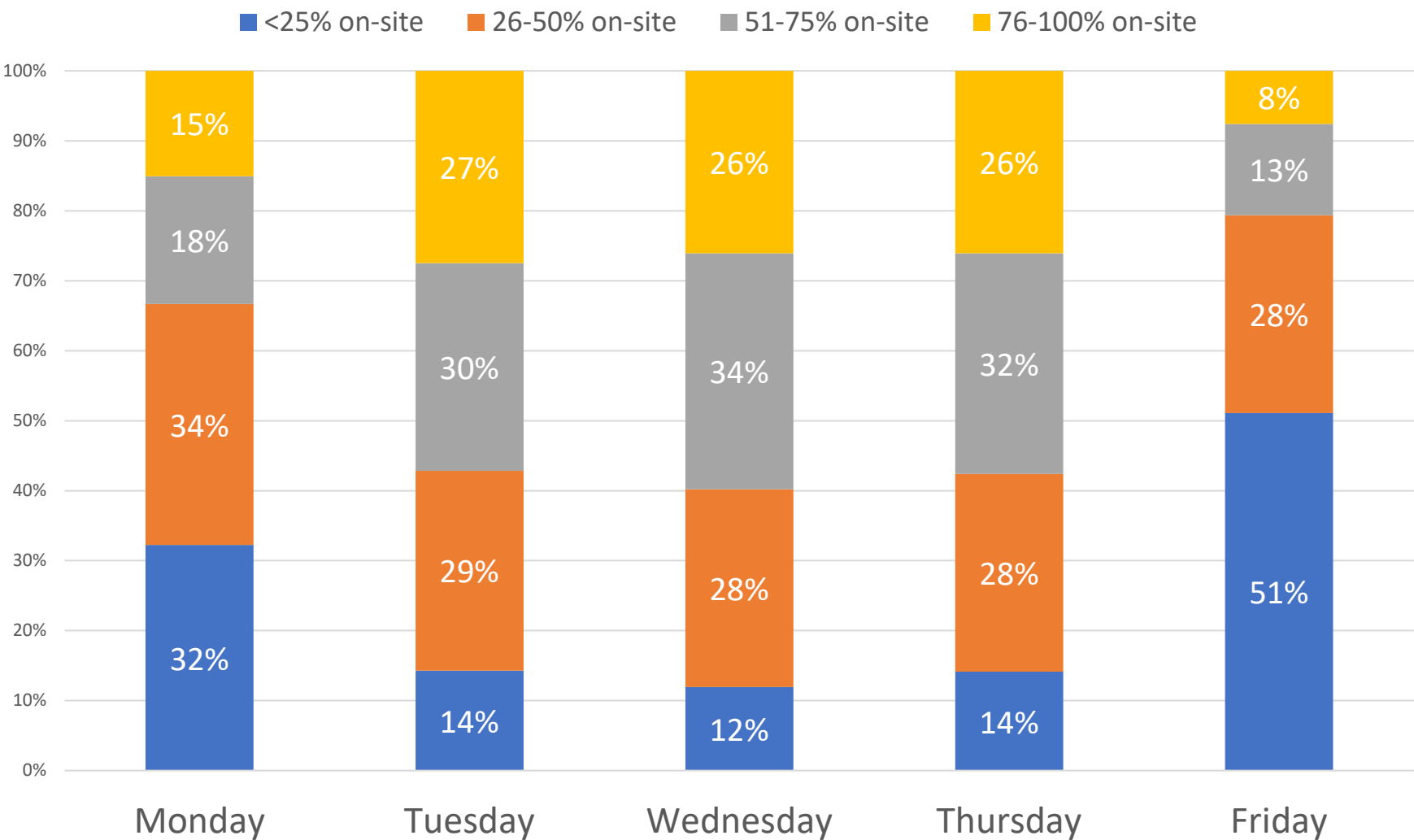
Employees are The Most Influential Factor for Employers' Return-to-Work Plans¹⁰



% reflects sum of “somewhat influential”, “influential” and “very influential” responses; employers could select more than one option

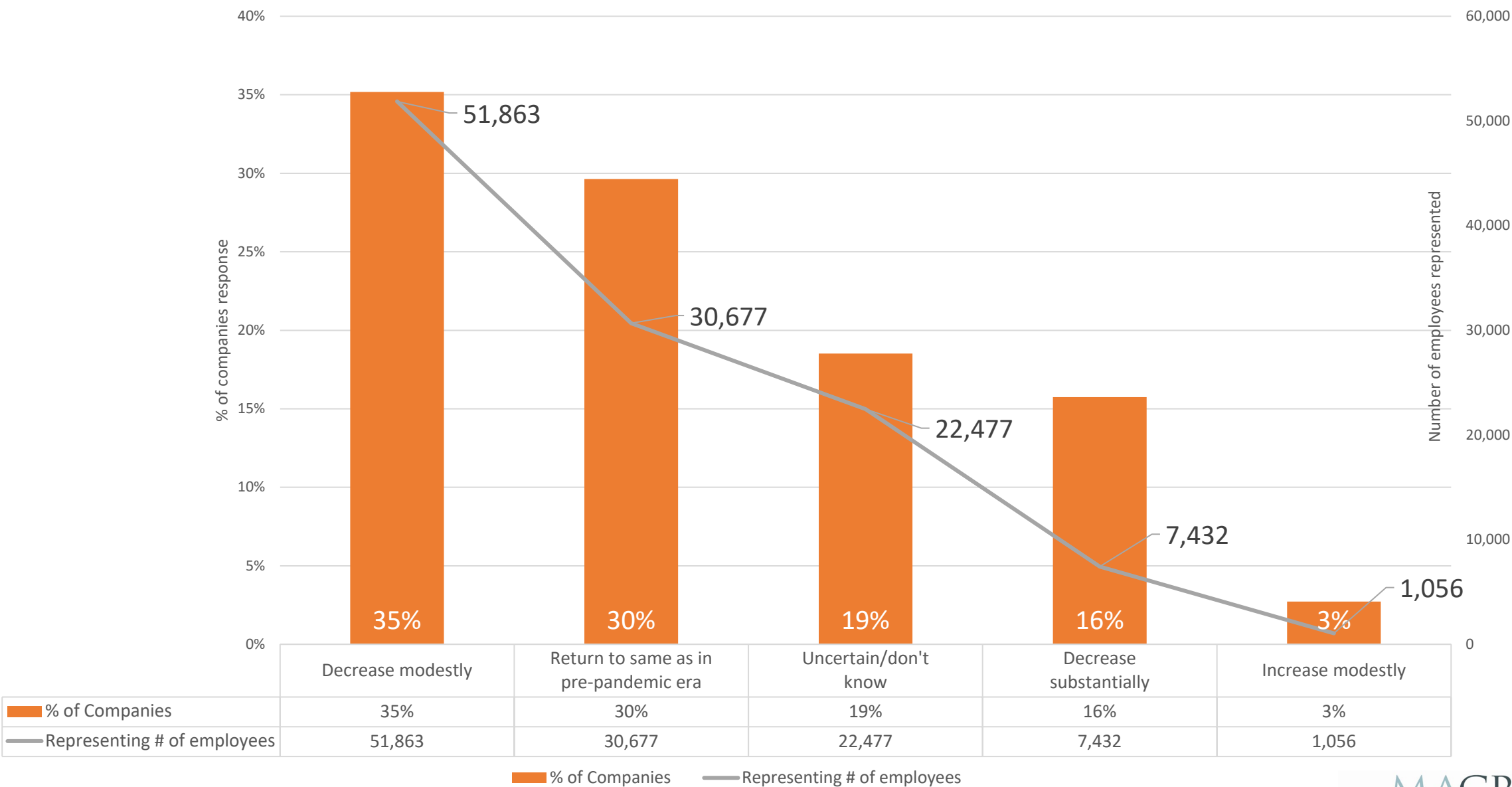
Companies Project Return to On-Site Work (by Day of the Week)

- The majority of companies (51%) anticipate that Friday will have the largest percent of employees working remotely.
- The majority of companies are projecting that Tuesday, Wednesday, and Thursday will have the most on-site activity with over 50% of companies expecting 51-100% of their employees returning to the office.



Based on companies' estimation of the percentage (range) of employees on-site

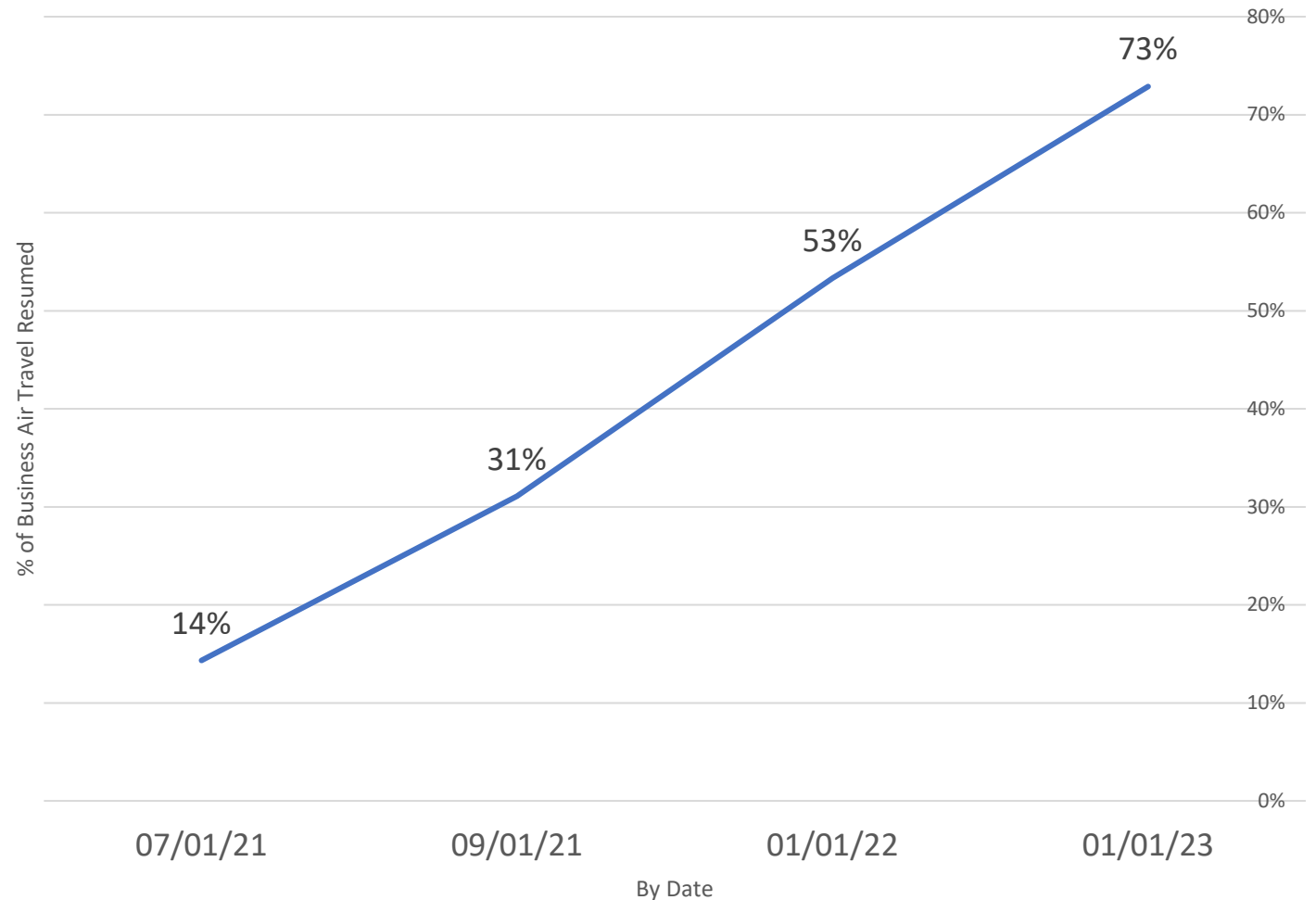
Anticipated Employee Dependency on Public Transit



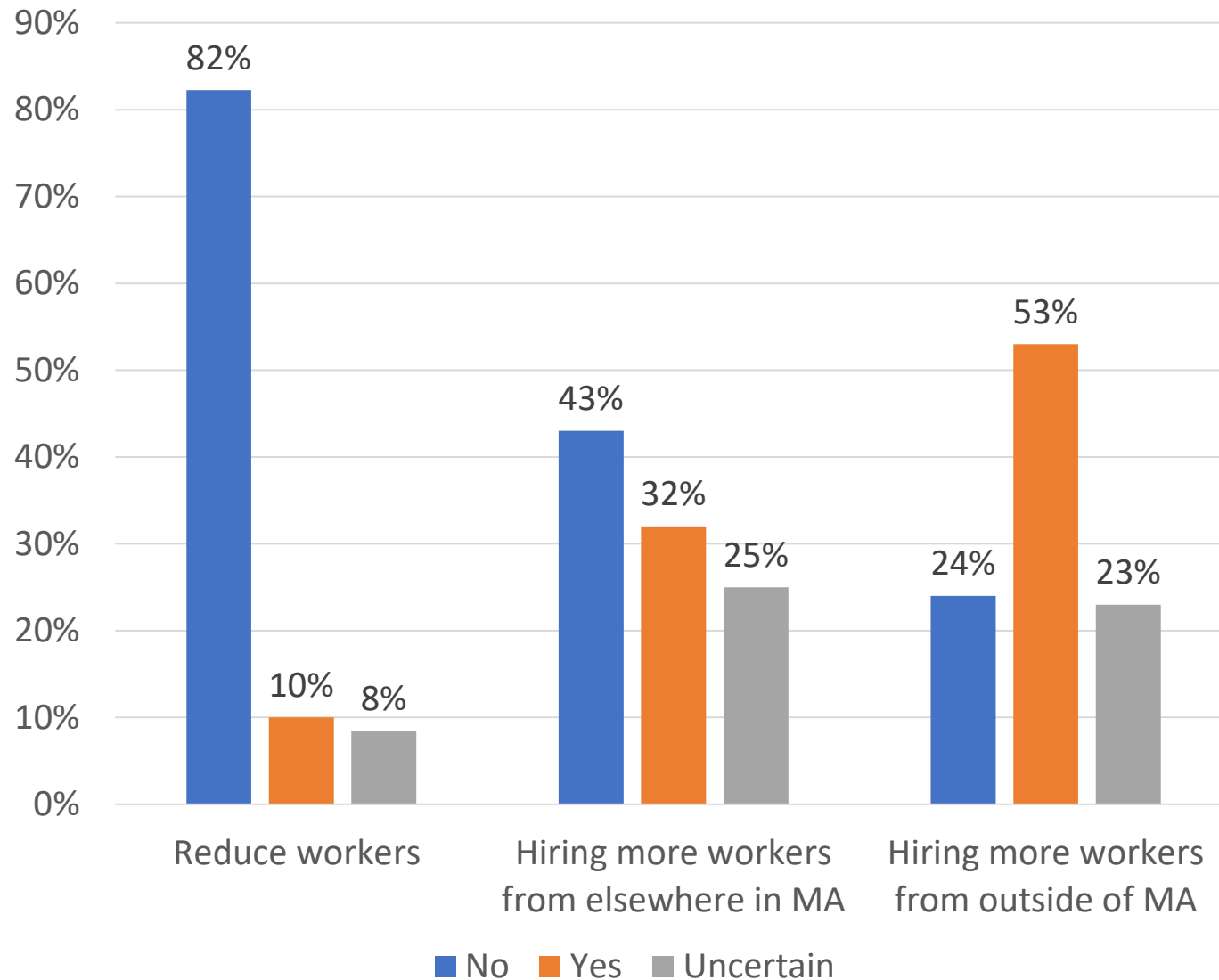
Return of Business Air Travel

13

- Business Air Travel Expected to Reach 53% Return by the end of 2021.
- On average, Business Air Travel is not anticipated to return to pre-pandemic levels by the end of 2022
- 20% of companies report returning to 100% pre-pandemic travel by 1/1/2023.

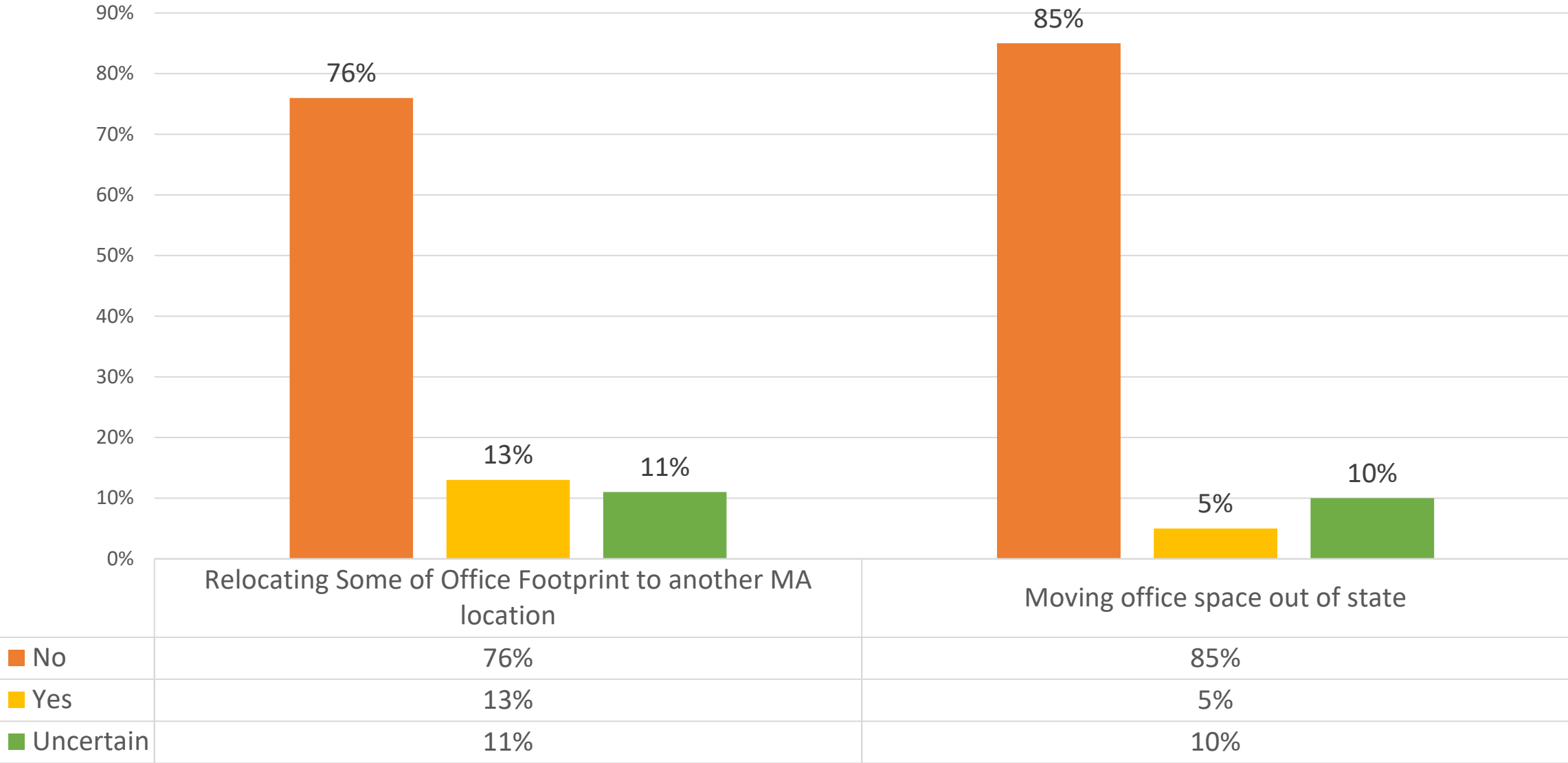


Employers' Current Considerations on Hiring



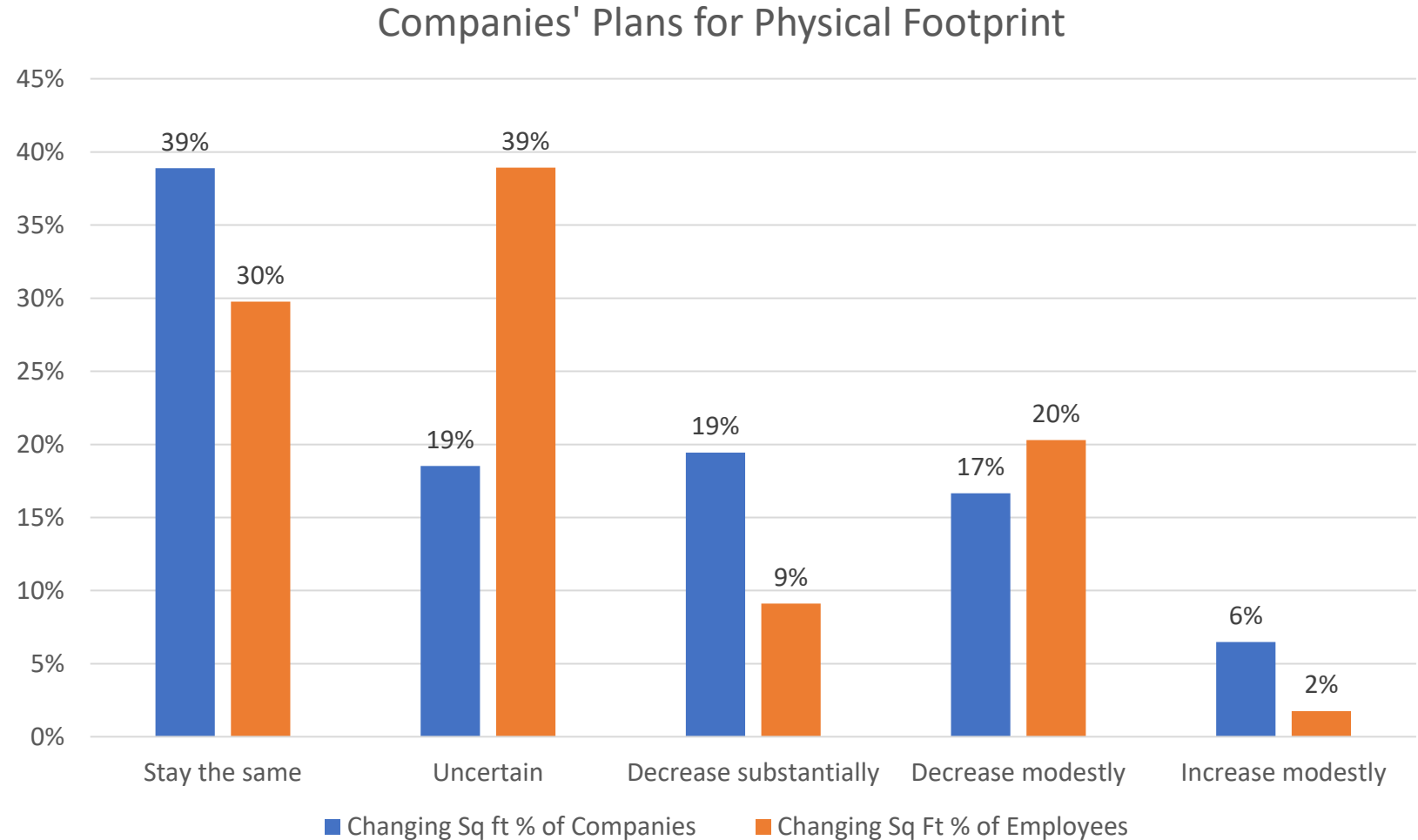
53% of companies are planning to hire workers from outside of MA.

Companies Considering Office Space Relocation

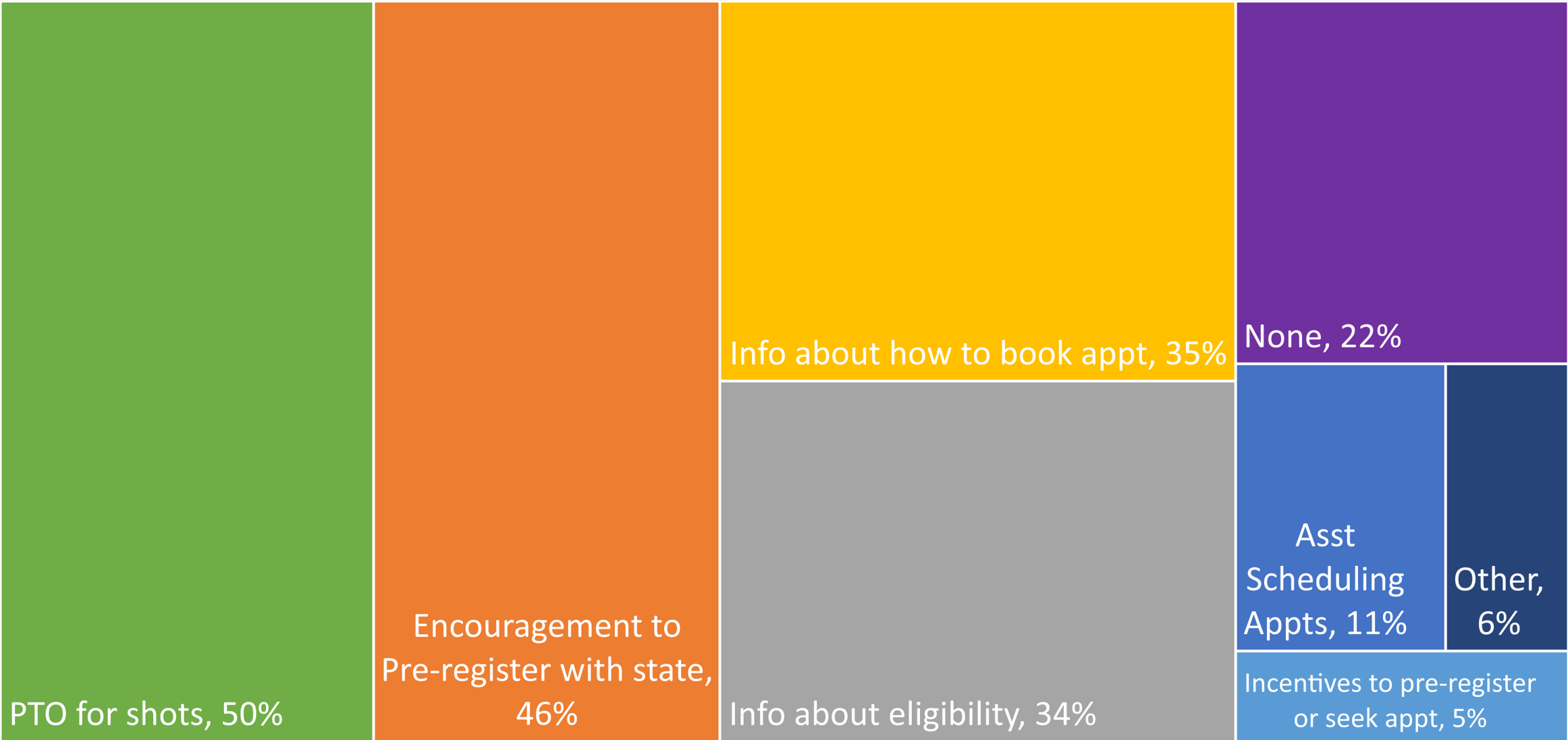


Plans for Changes to Physical Footprint

- 36% of employers reported plans to either substantially or modestly decrease their physical footprint in MA.
- No companies reported plans for significant increases in their physical footprint.



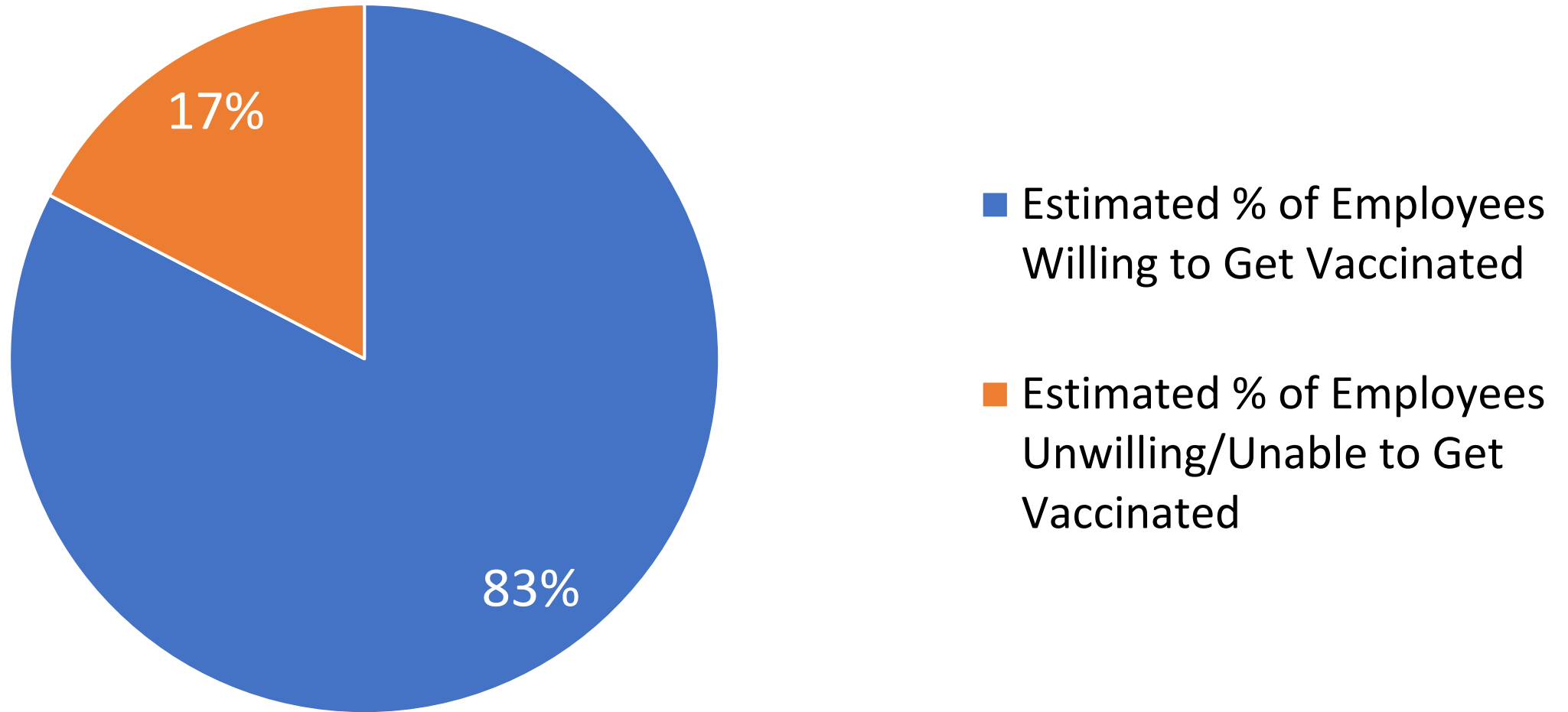
Supports Companies are Providing for Employees to Receive Vaccinations



% reflects employers that selected/are providing that support; employers could select more than one option

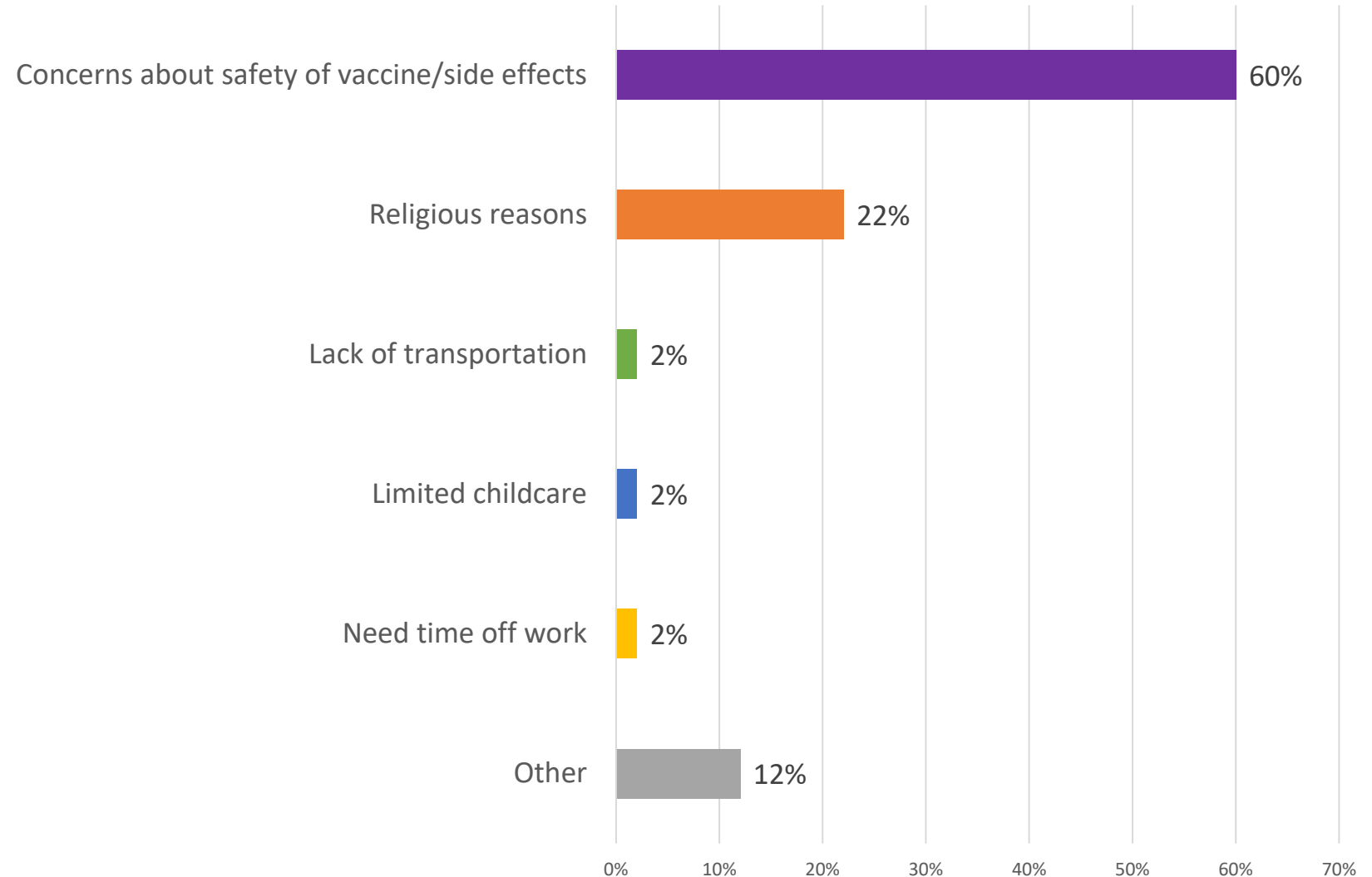
Estimated Percentage of Employees Willing or Able to Receive Vaccine

18



Potential Reasons Employees Unwilling/Unable to Be Vaccinated

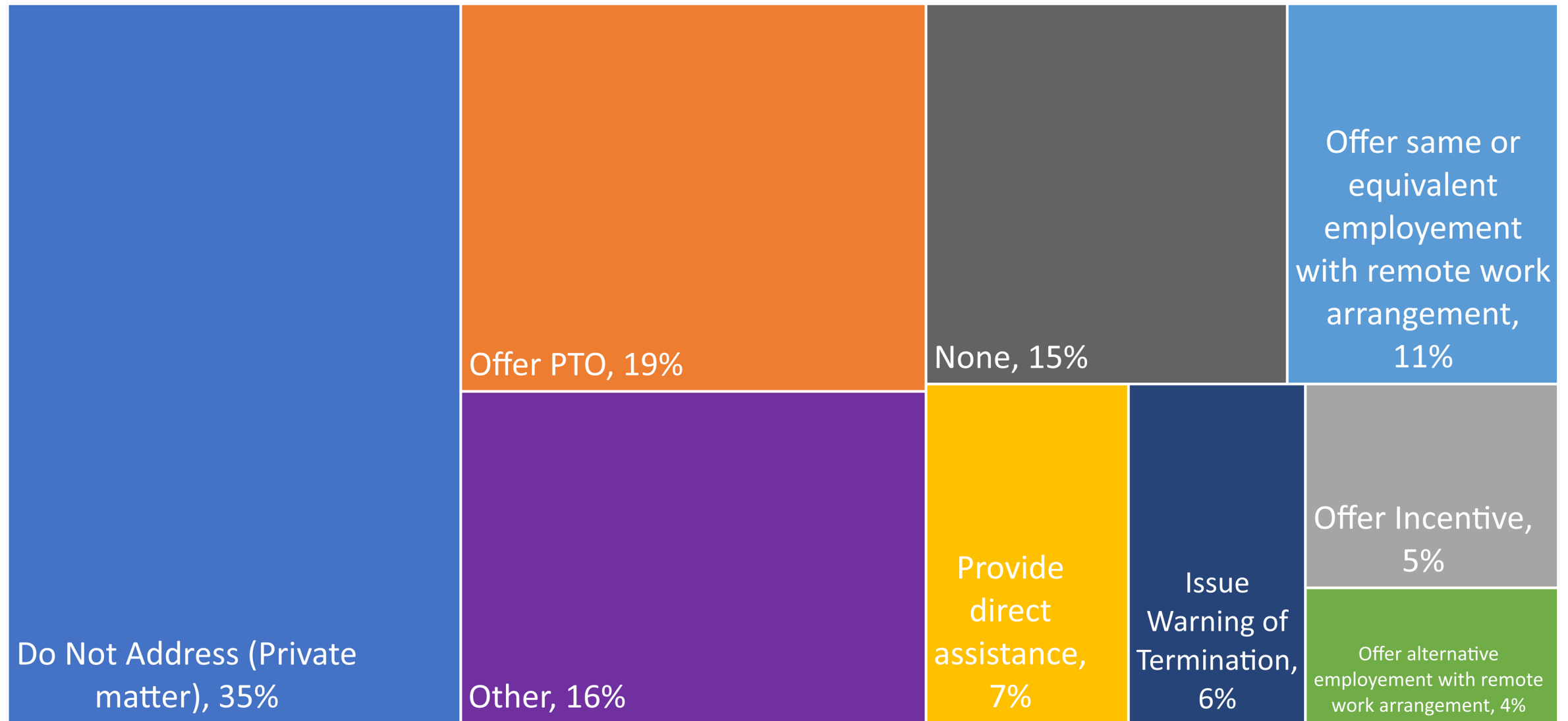
- Safety/side effects (60%) and religious factors (22%) are top reasons why employers believe employees are not getting vaccinated.



% reflects employers that selected each factor; employers could select more than one option

Employer Plans to Address Unvaccinated Employees

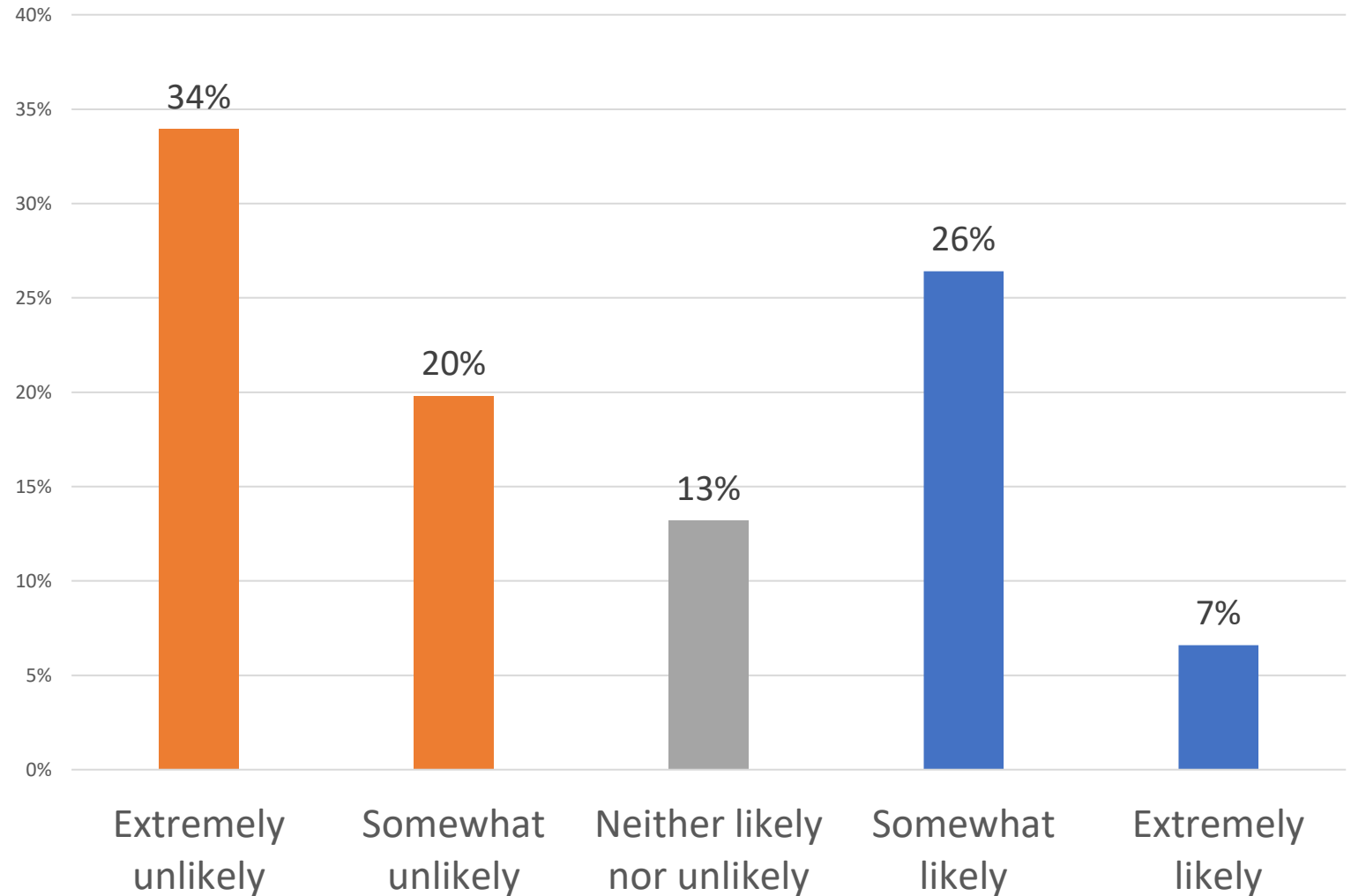
20



% reflects employers that selected the measure; employers could select more than one option

Employers on Vaccination Mandates

While 33% of companies are likely to consider vaccine mandates, the majority are unlikely (54%) or unsure.





Thank You

Survey organized by the Massachusetts Competitive Partnership (MACP) with support from:



Survey was conducted between April 12 and May 10

December & August Comparison

23

Of those that disclosed company name, 15% of the May respondents also took the December survey and 15% also took the August survey.

May 2021	December 2020	August 2020
110 companies 113,505 employees in MA	122 companies 130,306 employees in MA	106 companies 127,229 employees in MA
Pre-COVID WFH: 6% Current (May) WFH: 85% Post-COVID WFH: 32% (“WFH” = <i>fully + mostly remote</i>)	Pre-COVID WFH: 15% Current (December) WFH: 78% Post-COVID WFH: 52%	Pre-COVID WFH: 18% Current (August) WFH: 82% Post-COVID WFH: 47%
Factors in decision to offer remote or hybrid arrangements: 95% Employee engagement/retention 89% Employee sentiment 89% Employee productivity 87% Employee recruitment 87% Work-life balance 80% New remote work capabilities 67% Commuting time/costs 49% Overhead Costs 43% Availability of childcare 37% Historic reliance on remote work 7% Other	Triggers to return: Availability of childcare 15% Opening of schools 23% Public transportation safety and availability 20% Waiting for infection rate to reduce 52% Improved rapid testing results 18% Waiting for a treatment of vaccine 78% Employee sentiment 38% Further government guidance 13% None 7%	Triggers to return: Availability of childcare 25% Opening of schools 38% Public transportation safety and availability 23% Waiting for infection rate to reduce 40% Improved rapid testing results 13% Waiting for a treatment of vaccine 44% Employee sentiment 44% Further government guidance 16% None 22%

10% of identified respondents took all three (August, December, and May) surveys.

May, December & August Comparison

24

May 2021	December 2020	August 2020
<p>Estimated 22% remote employees return by July 2021</p> <p>Estimated 48% remote employees return by September 2021</p> <p>Estimated 61% remote employees return by January 2022</p>	<p>Estimated 49% workforce return by July 2021</p> <p>Estimated 61% workforce return by September 2021</p> <p>Estimated 81% workforce return in 2022</p>	<p>Estimated 29% of workforce return by Labor Day 2020</p> <p>Estimated 39% of workforce return by January 1 2021</p>
<p>Vaccination Support:</p> <p>PTO for shots, 50%</p> <p>Encouragement to pre-register with state, 46%</p> <p>Info on how to book an appointment, 35%</p> <p>Info about eligibility, 34%</p> <p>None, 22%</p> <p>Assistance scheduling appts, 11%</p> <p>Incentives to pre-register/seek appt, 5%</p> <p>Other, 6%</p>	<p>Testing:</p> <p>39% not testing and not interested in learning more</p> <p>36% not testing but interested in learning more</p> <p>12% testing and interested in learning more</p> <p>12% testing and not interested in learning more</p>	<p>Testing:</p> <p>30% not testing and not interested in learning more</p> <p>56% not testing but interested in learning more</p> <p>7% testing and interested in learning more</p> <p>7% testing and not interested in learning more</p>
<p>Longer-term considerations:</p> <p>13% Relocating some of office footprint to another MA location</p> <p>36% Decreasing physical MA office footprint</p> <p>5% Moving office space out of state</p> <p>53% Planning to hire workers from outside of MA</p>	<p>Longer-term considerations:</p> <p>14% Relocating some portion of urban office footprint to a suburban market</p> <p>38% Reducing overall MA office space footprint</p> <p>28% Moving space and/or jobs out-of-state*</p>	<p>Longer-term considerations:</p> <p>8% Relocating some portion of urban office footprint to a suburban market</p> <p>54% Reducing overall MA office space footprint</p> <p>60% Moving/allowing for more work to be done remotely out-of-state</p>