



100 Business Survey “COVID-19 Remote Work”

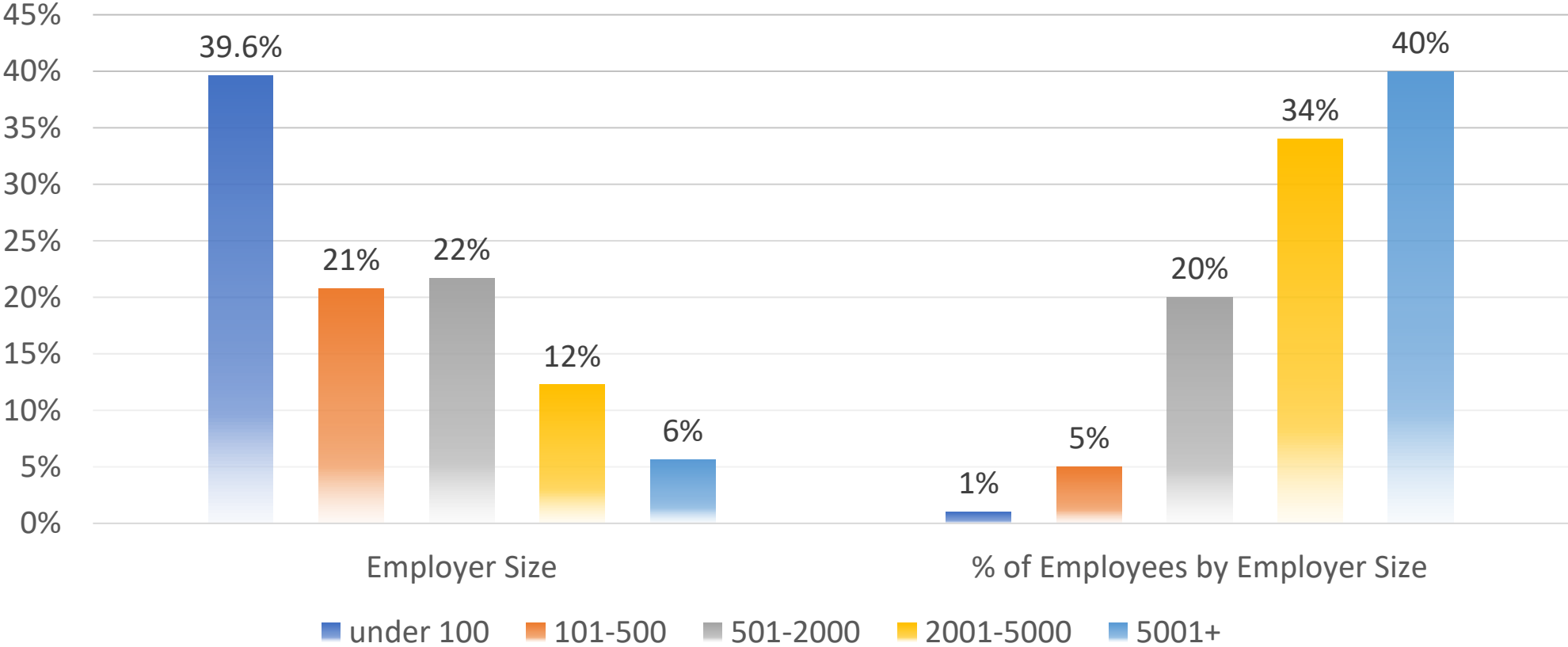
August 26, 2020

Survey Participants

106 companies*

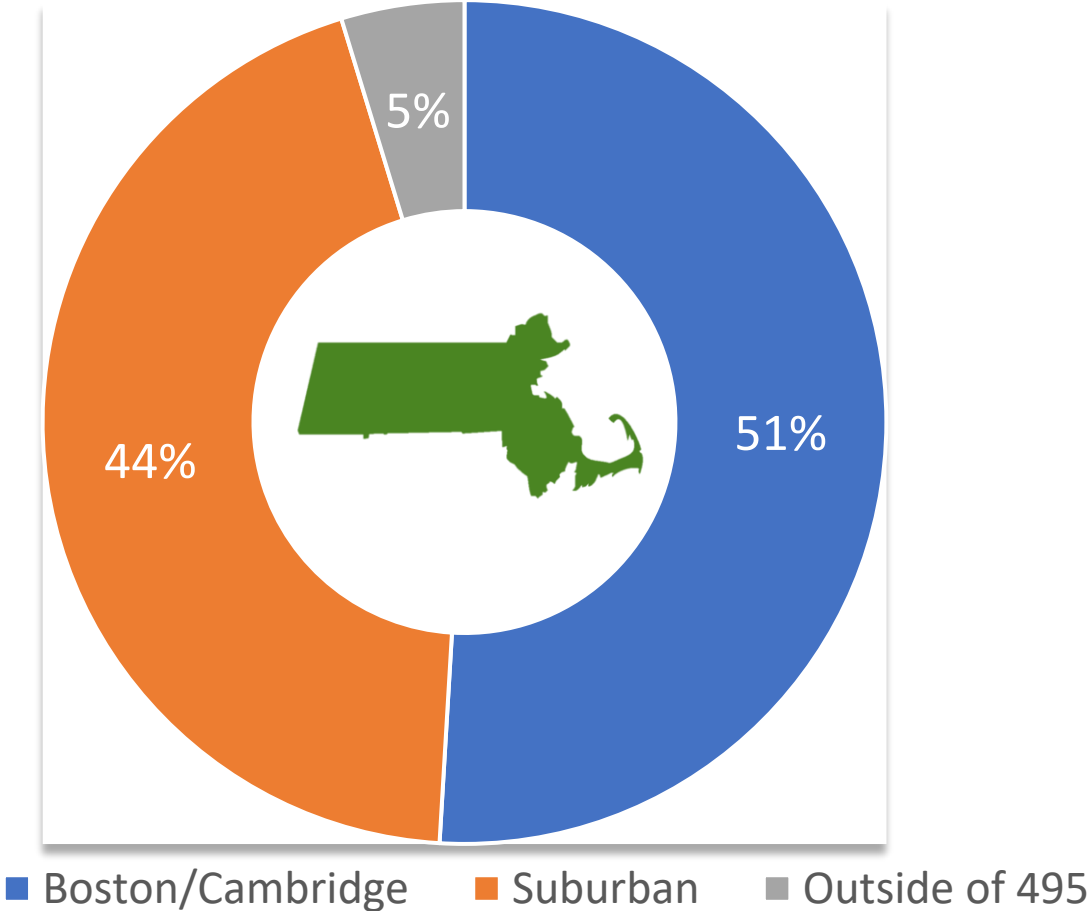
Representing 127,229 employees in MA

- 50,700 employees are from 6 companies with over 5,000 employees
- 75,106 employees are from 58 companies with between 101 and 5,000 employees
- 1,423 employees are from 42 companies with under 100 employees



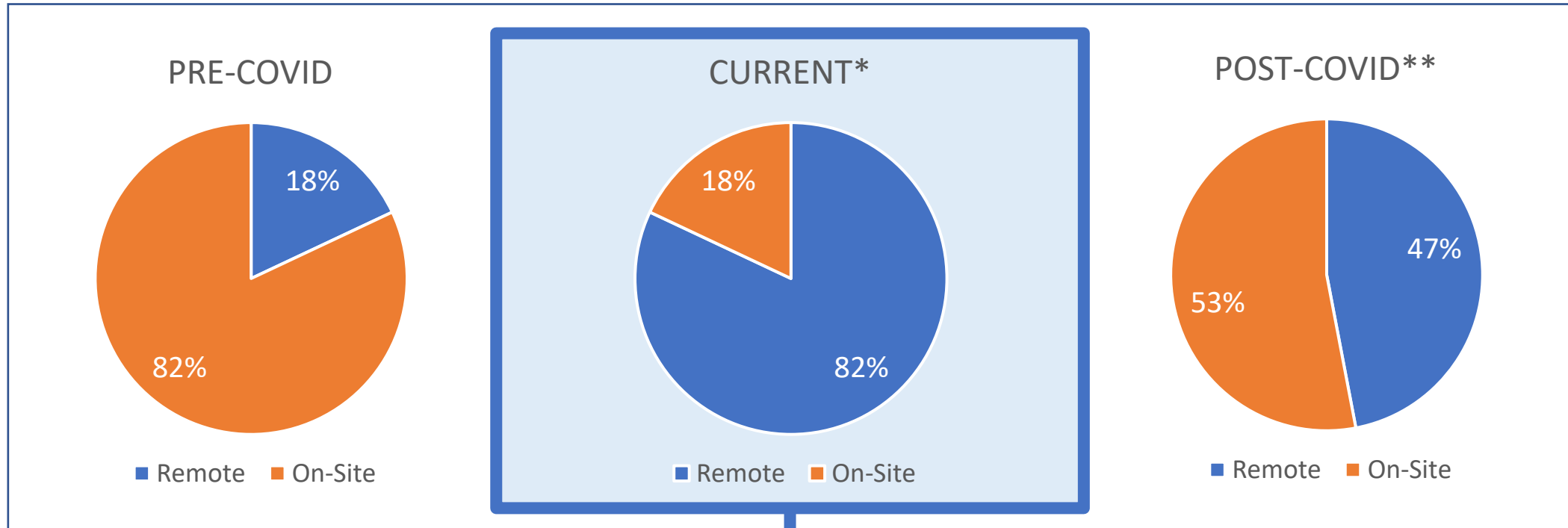
*Hospitals and Colleges were not included in final data

Respondent Locations*



*Companies were asked to select from Boston/Cambridge, Suburban or Outside 495. For companies that selected more than one option, location defaulted to company headquarters.

Total Employees Working from Home



40% of companies, representing over 17,000 employees, report that they are operating **100% remotely**.

66% of the companies surveyed, representing over 75,000 employees, report that **90% or more of their employees are currently working remotely**.

92% of companies report **OVER HALF** of employees are currently working from home.

*August 2020

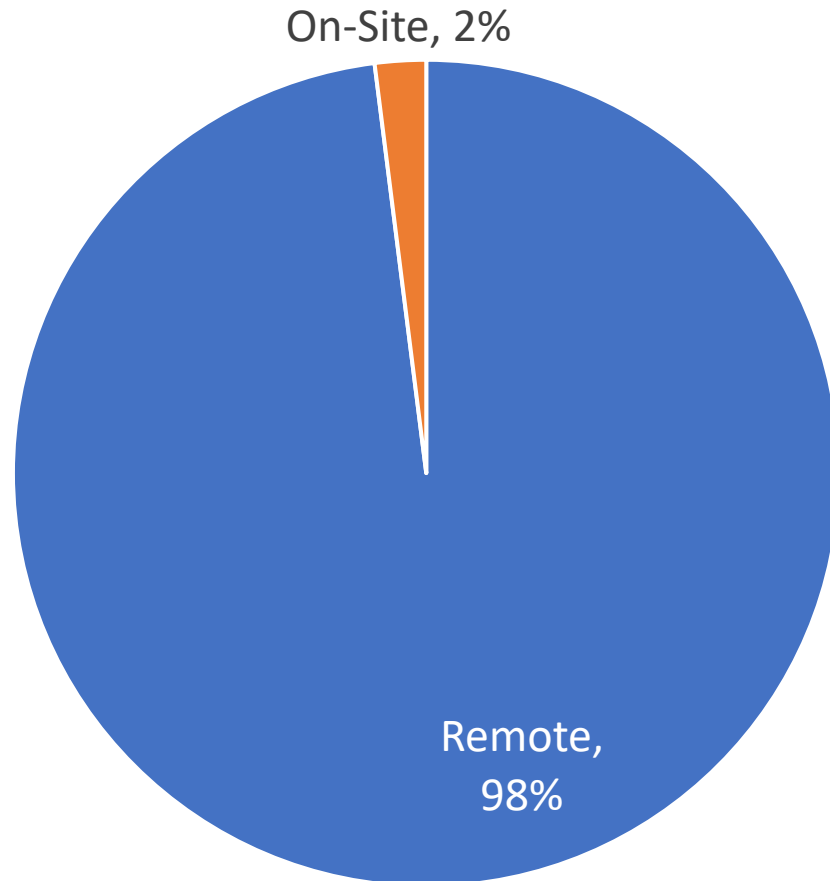
**Post-vaccine

Working from Home by the Company Size + Geography

	Pre-COVID REMOTE	Currently REMOTE	Post-COVID REMOTE
Company Size			
1-100	14%	84%	58%
101-500	11%	86%	41%
501-2000	18%	80%	45%
2001-5000	14%	82%	44%
5001+	22%	82%	50%
Average	18%	82%	47%
Company Location			
Boston/Cambridge	18%	89%	47%
Rest of State (Suburban/Outside 495)	18%	74%	48%

*Percentages include total number of employees, including those whose work requires them to be on-site.

Most Who **Can** Work From Home Are Working From Home

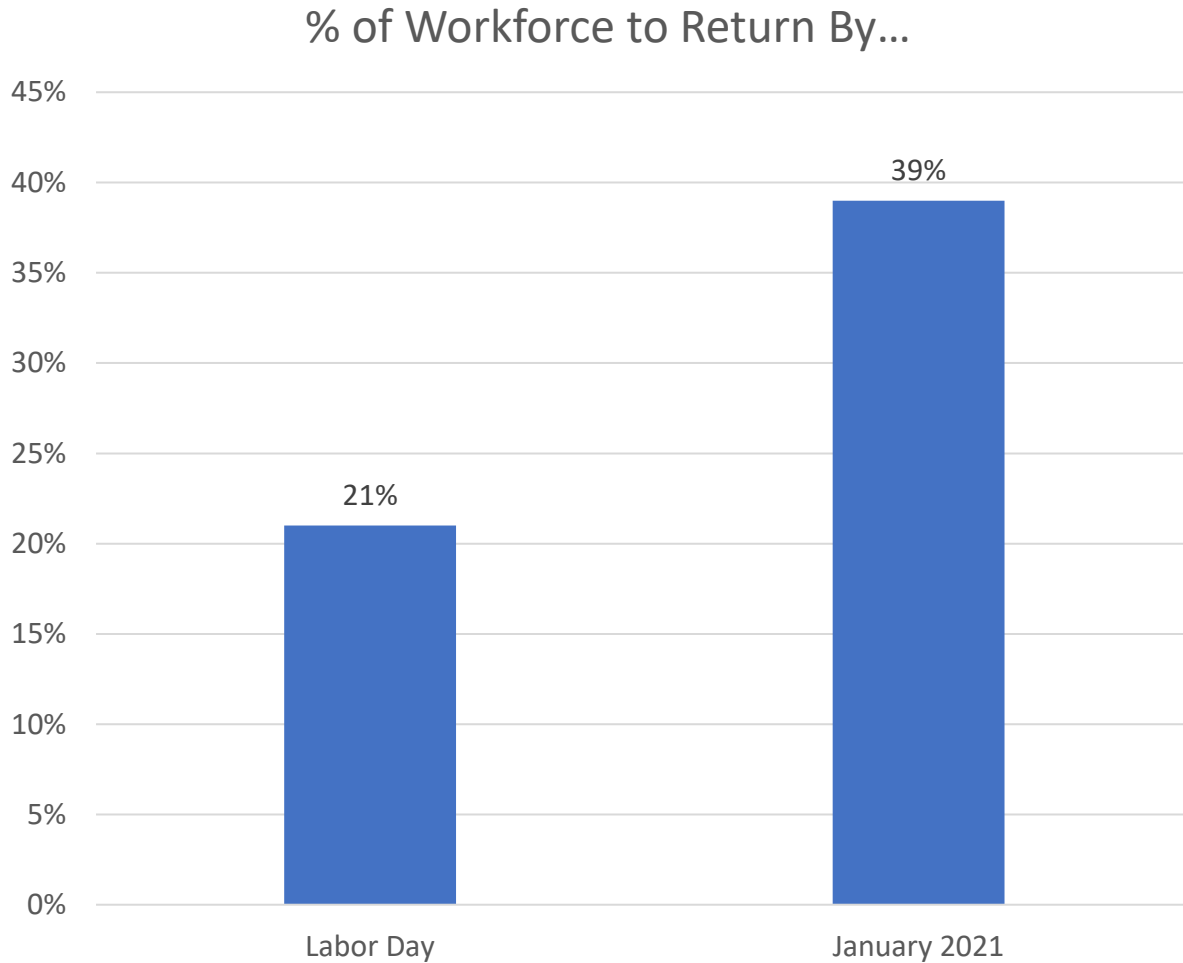


By Size and Location

Company Size	% Employees Who Are Able to Work From Home Who Are Working From Home*
1-100	87%
101-500	97%
501-2000	94%
2001-5000	99%
5001+	99%
Average	98%
Company Location	
Boston/Cambridge	98%
Rest of State (Suburban + Outside 495)	97%

*Percentages in each category are based upon aggregated employee counts. This excludes employees whose work requires them to be on-site.

Return to Work Estimates

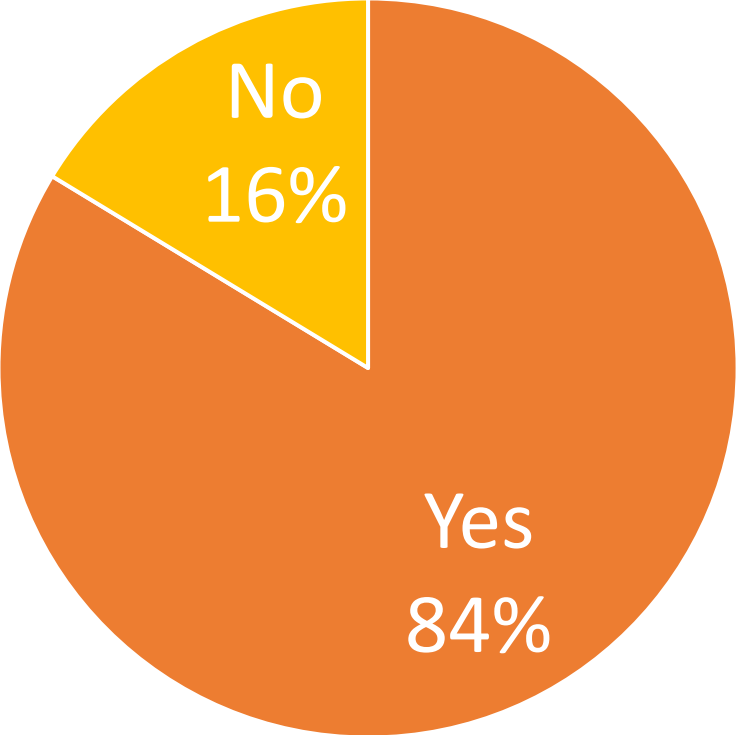


21% of total workforce will have returned by **Labor Day 2020**.

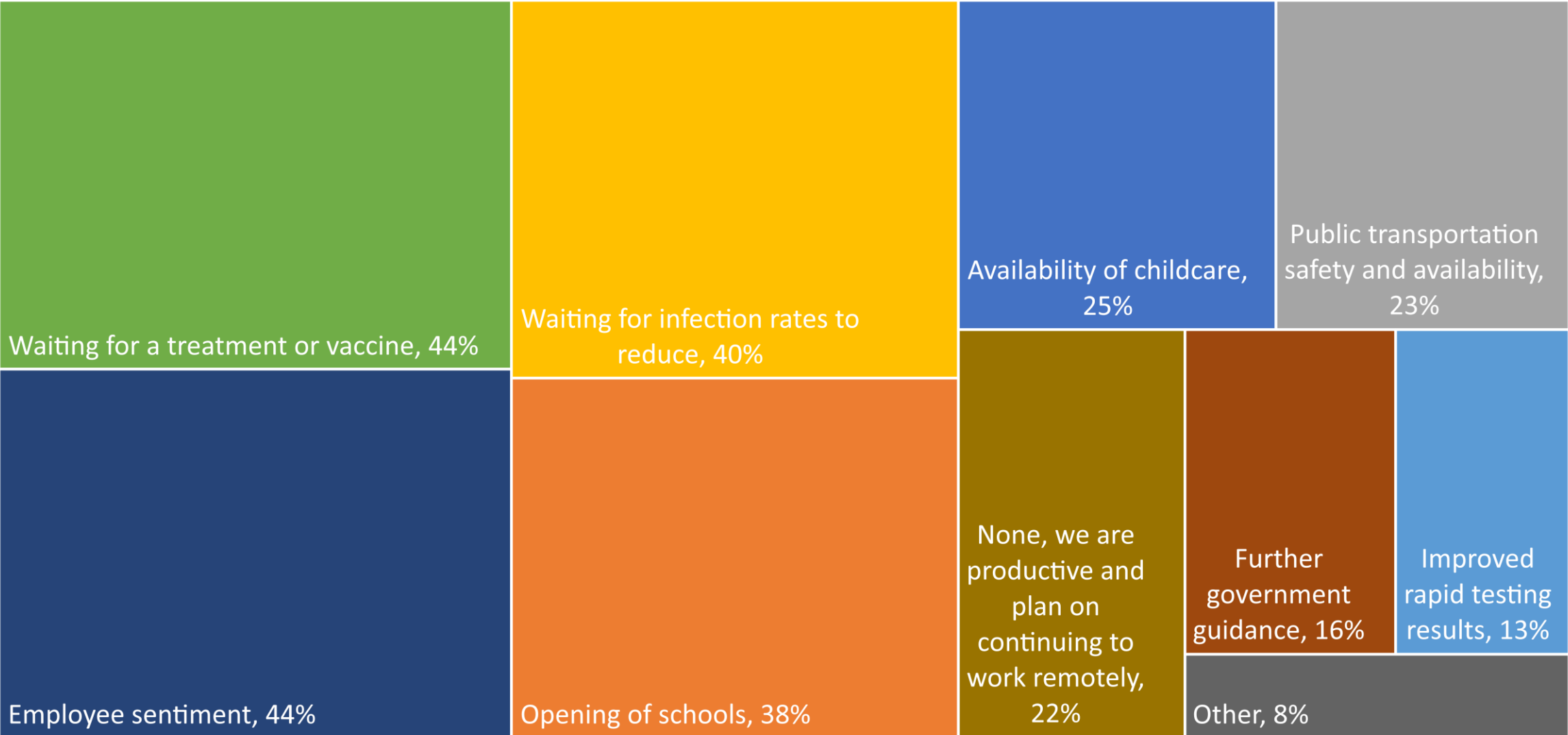
39% of workforce is estimated to return by **January 2021** (additional estimated 14,000 employees from Labor Day).

Employer Sentiment on Reopening Guidelines

Majority of **Employers Satisfied** with State Reopening Guidelines



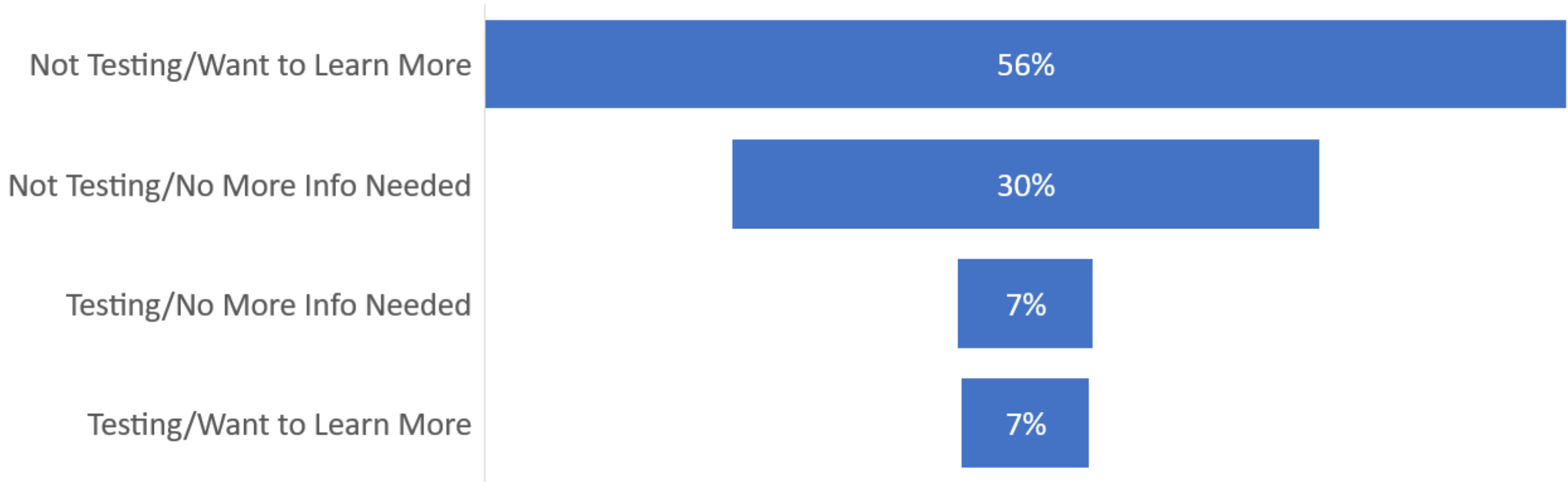
Top 3* Factors Impacting Employers Return to Workplace Decisions



*Survey respondents could select up to 3

Testing

The **majority** of companies are **not currently offering testing** for employees, but **they would like to know more about testing.**



Major Concerns Impacting Productivity



87% of companies say they are concerned about the lack of **childcare availability on employees' productivity while working remotely.**

87% of companies are concerned about **employees' attendance, productivity, and engagement due to the limited return to in-person, K-12 learning.**



Summary of Longer-Term Considerations

60% of companies report they are *considering moving* or allowing more work to be done remotely **out-of-state.**

Considering moving/allowing for more work to be done remotely out-of-state

60%

40%

Considering reducing your overall MA office space footprint

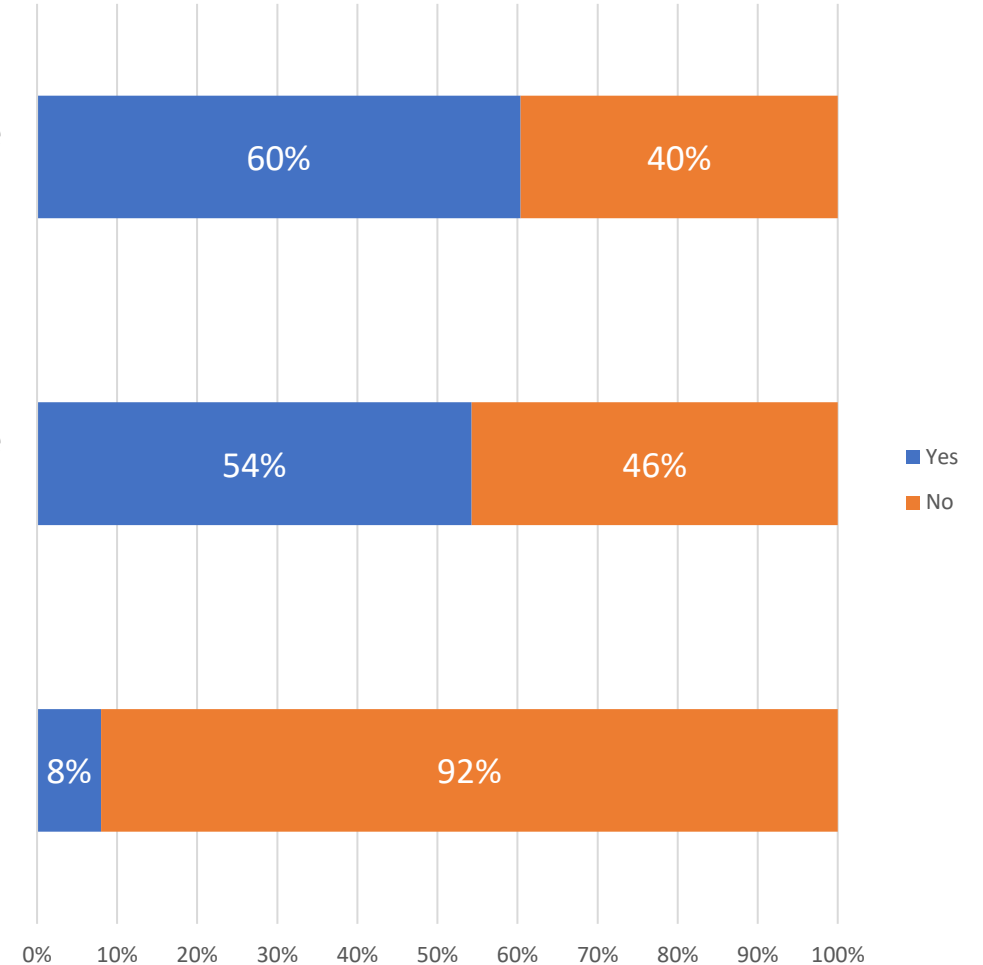
54%

46%

Considering relocating some portion of your urban office footprint to a suburban market

8%

92%



Appendix

Survey Questions

Summary of Respondents by Question

Survey Questions

1. What is your total number of employees in MA?

Answer: 127,229 employees

Total respondents: 106

2. What percentage of your total MA workforce is currently working remotely?

Answer: 82% (104,068 employees WFH/127,229 employees total)

Total respondents: 106

3. What % of your MA staff **that can** work remotely is currently working remotely?

Answer: 98%

Total respondents: 105

Employees represented: 123,590

4. Do you wish to have more than the allotted % of employees (50% of capacity) who are allowed to return to the office as part of Phase III of the State's reopening immediately return to work?

Answer: Yes – 16%; No – 84%

Total respondents: 104

Employees represented: 124,972

Survey Questions

5. What percentage of your total number of employees in MA will return to work by:

- A. Labor Day?

Answer: 21%

Total respondents: 102

Employees represented: 120,675

- B. January 2021?

Answer: 39%

Total respondents: 89

Employees represented: 85,456

6. Complete the following:

Pre-COVID, approximately ___% of our workforce worked some/all from home.

Answer: 18%

Total respondents: 103

Employees represented: 121,375

Post-COVID, we estimate that ___% of our workforce will work some/all from home.

Answer: 47%

Total respondents: 98

Employees represented: 110,935

Survey Questions

7. What triggers are **most** influencing your decision on returning to work (**circle up to three**)?

Answer: See below

Total respondents: 106

Employees represented: 127,229

- a. Availability of childcare 25%
- b. Opening of schools 38%
- c. Public transportation safety and availability 23%
- d. Waiting for infection rates to reduce 40%
- e. Improved rapid testing results 13%
- f. Waiting for a treatment or vaccine 44%
- g. Employee sentiment 44%
- h. Further government guidance 16%
- i. Other _____ 8%
- j. None, we are productive and plan on continuing to work remotely 22%

8. Are you concerned that either or both of the following will impact the attendance, productivity, and engagement of your employees working from home this fall?

- a. The lack of child care options

Answer: Yes – 87%; No – 13%

Total respondents: 106

Employees represented: 127,229

- b. Schools (K-12) not fully reopening

Answer: Yes – 87%; No – 13%

Total respondents: 106

Employees represented: 127,229

Survey Questions

9. Regarding testing (**circle one**):

Total respondents: 106

Employees represented: 127,229

- a. We are not testing and have no interest in testing 30%
- b. We are not testing but would like to learn more about testing availability 56%
- c. We are testing and would like to learn more about additional testing options 7%
- d. We are testing and need no further information 7%

10. Are you considering?

- a. Relocating some portion of your urban office footprint to a suburban market

Answer: Yes – 8%; No – 92%

Total respondents: 100

Employees represented: 121,301

- b. Reducing your overall MA office space footprint

Answer: Yes – 54%; No – 46%

Total respondents: 105

Employees represented: 123,590

- c. Moving/allowing for more work to be done remotely out-of-state

Answer: Yes – 60%; No – 40%

Total respondents: 106

Employees represented: 127,229

Survey Questions

11. Our company is best described as (**circle one**): Boston/Cambridge, Suburban, Outside of 495

Answer: Boston/Cambridge – 51%; Suburban – 44%; Outside 495 – 5%

Total respondents: 106

Employees represented: 127,229

Companies by Size

Categorized by number of employees in Massachusetts

1-100 employees:	42 companies	1,423 employees
101-500 employees:	22 companies	6,300 employees
501-2000 employees:	23 companies	25,920 employees
2001-5000 employees:	13 companies	42,886 employees
5001+ employees:	6 companies	50,700 employees



Thank You

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



Survey was conducted between August 3rd and August 14th.