100 Business Survey
“COVID-19 Remote Work”

June 22, 2021
Survey Participants

**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: 21%
- Finance and Insurance: 11%
- Manufacturing: 11%
- Professional, Scientific, and Technical Services: 15%
- Other Services, except Public Administration: 13%
- All Other: 15%
- Retail Trade: 15%

By Companies Represented:
- Educational Services: 38%
- Professional, Scientific, and Technical Services: 26%
- Manufacturing: 17%
- Other Services, except Public Administration: 6%
- All Other: 4%
The Current State of Work Compared to Pre and Post Pandemic

- 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
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%).

2% of respondents did not answer
Employer Plans to Offer Remote or Hybrid Models of Work

- 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.

- Uncertain, we have yet to decide either way

- Do not plan to offer some new types of remote or hybrid remote/on-site work 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

- More Cleaning, 78%
- Mask Mandates, 65%
- Hybrid Practices, 59%
- Stagger Schedules, 48%
- Hybrid Technologies, 48%
- Hybrid Models, 75%
- Reduce Capacity, 61%
- Hybrid Physical Space, 55%
- Mental Health, 30%
- COVID Testing, 20%
- Transp... Subsidy, 12%
- Back-up Childcare, 9%
- Sick Days, 8%
- Childcare Subs..., 4%

% reflects employers that selected the measure; employers could select more than one option
### Employees are The Most Influential Factor for Employers’ Return-to-Work Plans

<table>
<thead>
<tr>
<th>Factor</th>
<th>Influence Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee engagement/retention</td>
<td>95%</td>
</tr>
<tr>
<td>Employee Recruitment</td>
<td>89%</td>
</tr>
<tr>
<td>Work-Life Balance</td>
<td>87%</td>
</tr>
<tr>
<td>Commuting time/costs</td>
<td>67%</td>
</tr>
<tr>
<td>Overhead Costs</td>
<td>49%</td>
</tr>
<tr>
<td>Employee Sentiment</td>
<td>89%</td>
</tr>
<tr>
<td>Employee productivity</td>
<td>87%</td>
</tr>
<tr>
<td>New remote work capabilities</td>
<td>80%</td>
</tr>
<tr>
<td>Availability of childcare</td>
<td>43%</td>
</tr>
<tr>
<td>Historic reliance on remote work</td>
<td>37%</td>
</tr>
<tr>
<td>Other</td>
<td>7%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th></th>
<th>&lt;25% on-site</th>
<th>26-50% on-site</th>
<th>51-75% on-site</th>
<th>76-100% on-site</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monday</td>
<td>32%</td>
<td>29%</td>
<td>12%</td>
<td>14%</td>
</tr>
<tr>
<td>Tuesday</td>
<td>14%</td>
<td>27%</td>
<td>26%</td>
<td>28%</td>
</tr>
<tr>
<td>Wednesday</td>
<td>18%</td>
<td>30%</td>
<td>34%</td>
<td>32%</td>
</tr>
<tr>
<td>Thursday</td>
<td>15%</td>
<td>26%</td>
<td>26%</td>
<td>28%</td>
</tr>
<tr>
<td>Friday</td>
<td>51%</td>
<td>28%</td>
<td>13%</td>
<td>8%</td>
</tr>
</tbody>
</table>
Anticipated Employee Dependency on Public Transit

<table>
<thead>
<tr>
<th>% of Companies</th>
<th>Representing # of employees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Decrease modestly</td>
<td>35%</td>
</tr>
<tr>
<td>Return to same as in pre-pandemic era</td>
<td>30%</td>
</tr>
<tr>
<td>Uncertain/don't know</td>
<td>19%</td>
</tr>
<tr>
<td>Decrease substantially</td>
<td>16%</td>
</tr>
<tr>
<td>Increase modestly</td>
<td>3%</td>
</tr>
</tbody>
</table>

% of companies response:
- Decrease modestly: 35%
- Return to same as in pre-pandemic era: 30%
- Uncertain/don't know: 19%
- Decrease substantially: 16%
- Increase modestly: 3%
Return of Business Air Travel

- 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.
<table>
<thead>
<tr>
<th>Relocating Some of Office Footprint to another MA location</th>
<th>Moving office space out of state</th>
</tr>
</thead>
<tbody>
<tr>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>76%</td>
<td>13%</td>
</tr>
</tbody>
</table>
• 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

- PTO for shots, 50%
- Encouragement to pre-register with state, 46%
- Info about how to book appt, 35%
- Info about eligibility, 34%
- None, 22%
- Asst scheduling appts, 11%
- Other, 6%
- Incentives to pre-register or seek appt, 5%

% 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

- Estimated % of Employees Willing to Get Vaccinated: 83%
- Estimated % of Employees Unwilling/Unable to Get Vaccinated: 17%
Safety/side effects (60%) and religious factors (22%) are top reasons why employers believe employees are not getting vaccinated.
### Employer Plans to Address Unvaccinated Employees

<table>
<thead>
<tr>
<th>Option</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do Not Address (Private matter)</td>
<td>35%</td>
</tr>
<tr>
<td>Offer PTO, 19%</td>
<td></td>
</tr>
<tr>
<td>None, 15%</td>
<td></td>
</tr>
<tr>
<td>Offer same or equivalent employment with remote work arrangement, 11%</td>
<td></td>
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<tr>
<td>Offer Incentive, 5%</td>
<td></td>
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<tr>
<td>Provide direct assistance, 7%</td>
<td></td>
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<tr>
<td>Issue Warning of Termination, 6%</td>
<td></td>
</tr>
<tr>
<td>Offer alternative employment with remote work arrangement, 4%</td>
<td></td>
</tr>
</tbody>
</table>

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

[Logos of the organizations supporting the survey]

Survey was conducted between April 12 and May 10
### December & August Comparison

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

<table>
<thead>
<tr>
<th>May 2021</th>
<th>December 2020</th>
<th>August 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>110 companies</strong></td>
<td><strong>122 companies</strong></td>
<td><strong>106 companies</strong></td>
</tr>
<tr>
<td><strong>113,505 employees in MA</strong></td>
<td><strong>130,306 employees in MA</strong></td>
<td><strong>127,229 employees in MA</strong></td>
</tr>
<tr>
<td>Pre-COVID WFH: 6%</td>
<td>Pre-COVID WFH: 15%</td>
<td>Pre-COVID WFH: 18%</td>
</tr>
<tr>
<td>Current (May) WFH: 85%</td>
<td>Current (December) WFH: 78%</td>
<td>Current (August) WFH: 82%</td>
</tr>
<tr>
<td>Post-COVID WFH: 32%</td>
<td>Post-COVID WFH: 52%</td>
<td>Post-COVID WFH: 47%</td>
</tr>
<tr>
<td>(“WFH” = fully + mostly remote)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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.
<table>
<thead>
<tr>
<th>May 2021</th>
<th>December 2020</th>
<th>August 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Estimated 22% remote employees return by July 2021</td>
<td>Estimated 49% workforce return by July 2021</td>
<td>Estimated 29% of workforce return by Labor Day 2020</td>
</tr>
<tr>
<td>Estimated 48% remote employees return by September 2021</td>
<td>Estimated 61% workforce return by September 2021</td>
<td>Estimated 39% of workforce return by January 1 2021</td>
</tr>
<tr>
<td>Estimated 61% remote employees return by January 2022</td>
<td>Estimated 81% workforce return in 2022</td>
<td></td>
</tr>
</tbody>
</table>

**Vaccination Support:**
- PTO for shots, 50%
- Encouragement to pre-register with state, 46%
- Info on how to book an appointment, 35%
- Info about eligibility, 34%
- None, 22%
- Assistance scheduling appts, 11%
- Incentives to pre-register/seek appt, 5%
- Other, 6%

**Testing:**
- 39% not testing and not interested in learning more
- 36% not testing but interested in learning more
- 12% testing and interested in learning more
- 12% testing and not interested in learning more

**Longer-term considerations:**
- 13% Relocating some of office footprint to another MA location
- 36% Decreasing physical MA office footprint
- 5% Moving office space out of state
- 53% Planning to hire workers from outside of MA
- 14% Relocating some portion of urban office footprint to a suburban market
- 38% Reducing overall MA office space footprint
- 28% Moving space and/or jobs out-of-state
- 8% Relocating some portion of urban office footprint
- 54% Reducing overall MA office space footprint
- 60% Moving/allowing for more work to be done remotely out-of-state