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

<table>
<thead>
<tr>
<th>Employer Size</th>
<th>% of Employees by Employer Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>under 100</td>
<td>39.6%</td>
</tr>
<tr>
<td>101-500</td>
<td>21%</td>
</tr>
<tr>
<td>501-2000</td>
<td>22%</td>
</tr>
<tr>
<td>2001-5000</td>
<td>12%</td>
</tr>
<tr>
<td>5001+</td>
<td>6%</td>
</tr>
<tr>
<td>1001-5000</td>
<td>20%</td>
</tr>
<tr>
<td>5001+</td>
<td>5%</td>
</tr>
<tr>
<td>1001-5000</td>
<td>1%</td>
</tr>
<tr>
<td>5001+</td>
<td>0%</td>
</tr>
</tbody>
</table>

*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.
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

<table>
<thead>
<tr>
<th>Company Size</th>
<th>Pre-COVID REMOTE</th>
<th>Currently REMOTE</th>
<th>Post-COVID REMOTE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-100</td>
<td>14%</td>
<td>84%</td>
<td>58%</td>
</tr>
<tr>
<td>101-500</td>
<td>11%</td>
<td>86%</td>
<td>41%</td>
</tr>
<tr>
<td>501-2000</td>
<td>18%</td>
<td>80%</td>
<td>45%</td>
</tr>
<tr>
<td>2001-5000</td>
<td>14%</td>
<td>82%</td>
<td>44%</td>
</tr>
<tr>
<td>5001+</td>
<td>22%</td>
<td>82%</td>
<td>50%</td>
</tr>
<tr>
<td><strong>Average</strong></td>
<td><strong>18%</strong></td>
<td><strong>82%</strong></td>
<td><strong>47%</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Company Location</th>
<th>Pre-COVID REMOTE</th>
<th>Currently REMOTE</th>
<th>Post-COVID REMOTE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Boston/Cambridge</td>
<td>18%</td>
<td>89%</td>
<td>47%</td>
</tr>
<tr>
<td>Rest of State (Suburban/Outside 495)</td>
<td>18%</td>
<td>74%</td>
<td>48%</td>
</tr>
</tbody>
</table>

*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**

<table>
<thead>
<tr>
<th>Company Size</th>
<th>% Employees Who Are Able to Work From Home Who Are Working From Home*</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-100</td>
<td>87%</td>
</tr>
<tr>
<td>101-500</td>
<td>97%</td>
</tr>
<tr>
<td>501-2000</td>
<td>94%</td>
</tr>
<tr>
<td>2001-5000</td>
<td>99%</td>
</tr>
<tr>
<td>5001+</td>
<td>99%</td>
</tr>
<tr>
<td><strong>Average</strong></td>
<td><strong>98%</strong></td>
</tr>
</tbody>
</table>

**Company Location**

<table>
<thead>
<tr>
<th>Location</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Boston/Cambridge</td>
<td>98%</td>
</tr>
<tr>
<td>Rest of State (Suburban + Outside 495)</td>
<td>97%</td>
</tr>
</tbody>
</table>

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

- Waiting for a treatment or vaccine, 44%
- Waiting for infection rates to reduce, 40%
- Availability of childcare, 25%
- Public transportation, safety and availability, 23%
- Employee sentiment, 44%
- Opening of schools, 38%
- None, we are productive and plan on continuing to work remotely, 22%
- Further government guidance, 16%
- Improved rapid testing results, 13%

*Survey respondents could select up to 3
The majority of companies are not currently offering testing for employees, but they would like to know more about testing.
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% Yes, 40% No
- **Considering reducing your overall MA office space footprint:** 54% Yes, 46% No
- **Considering relocating some portion of your urban office footprint to a suburban market:** 92% No, 8% Yes
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
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

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Companies by Size

Categorized by number of employees in Massachusetts

<table>
<thead>
<tr>
<th>Employee Range</th>
<th>Number of Companies</th>
<th>Number of Employees</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-100 employees</td>
<td>42 companies</td>
<td>1,423 employees</td>
</tr>
<tr>
<td>101-500 employees</td>
<td>22 companies</td>
<td>6,300 employees</td>
</tr>
<tr>
<td>501-2000 employees</td>
<td>23 companies</td>
<td>25,920 employees</td>
</tr>
<tr>
<td>2001-5000 employees</td>
<td>13 companies</td>
<td>42,886 employees</td>
</tr>
<tr>
<td>5001+ employees</td>
<td>6 companies</td>
<td>50,700 employees</td>
</tr>
</tbody>
</table>
Thank You

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

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