

SNAPSHOT

Greater Madison
Telework Survey 2021



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Greater Madison Metropolitan Planning Organization

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Introduction

The Greater Madison Telework Survey 2021 is the second regional survey conducted by the Greater Madison MPO (“MPO”) to assess telework trends and attitudes resulting from the COVID-19 pandemic. Conducted in partnership with Sustain Dane and the Dane County Office of Energy and Climate Change, it also serves to explore how individuals and employers in Dane County perceive and/or use telework as a way to reduce driving and support environmental sustainability.

The Greater Madison MPO is the federally designated metropolitan planning organization for the Madison urban area. The mission of the MPO is to lead the collaborative planning and funding of a sustainable, equitable transportation system for the greater Madison region. The MPO administers RoundTrip, a program that works to reduce vehicle trips, vehicle miles traveled, congestion, and vehicle emissions in Dane County. RoundTrip provides information and assistance to individuals and employers to encourage transportation choices such as walking, biking, public transit, carpooling, vanpooling, telework and flex schedules, for both commute and personal trips.

The Greater Madison Telework Survey 2021 was conducted online from July 20–August 16 to assess the telework experiences, attitudes and plans of non-managers, managers and executives in the Madison region (see Appendix A for full results). It builds upon the results of the [Madison Region Remote Work Survey](#) conducted in June 2020. Both surveys support shared learning about regional attitudes and trends, and provide a local perspective on national workplace and commute data.

This summary contains highlights from the 2021 survey along with comparisons to 2020 results. Questions explore the perspectives of respondents sixteen months after the first statewide public health order for COVID-19 went in to place on March 24, 2020. Responses provide a perspective on pre-pandemic commutes; telework benefits and challenges; and desires and expectations for the future. Additional analysis summarized here and included in Appendix A uses an equity lens to explore how respondents with varying demographic characteristics are experiencing telework.

With 61% of respondents working in government/civil services, the survey does not represent the actual distribution of employer types in Dane County. However, the only significant difference found between public and private sector responses was that 17% of private sector respondents anticipate teleworking five+ days per week in the future, compared to 5% from the public sector.

These results provide useful insights for employers and policymakers making decisions about a future in which telework will be commonplace. These include decisions about workplace structures, commuter benefits, sustainability programs, infrastructure investments, and transportation and land use policies. They also offer a view of the evolving nature of workplaces and commutes in the greater Madison region, and the potential for telework to contribute to transportation sustainability.

“Being able to work from home has helped with health issues related to my disability and hopefully will allow me to continue working longer before retirement.”

After business returns to normal:

64% expect to telework at least 1 day per week

78% will view an employer more favorably if given the option to telework

Key Findings

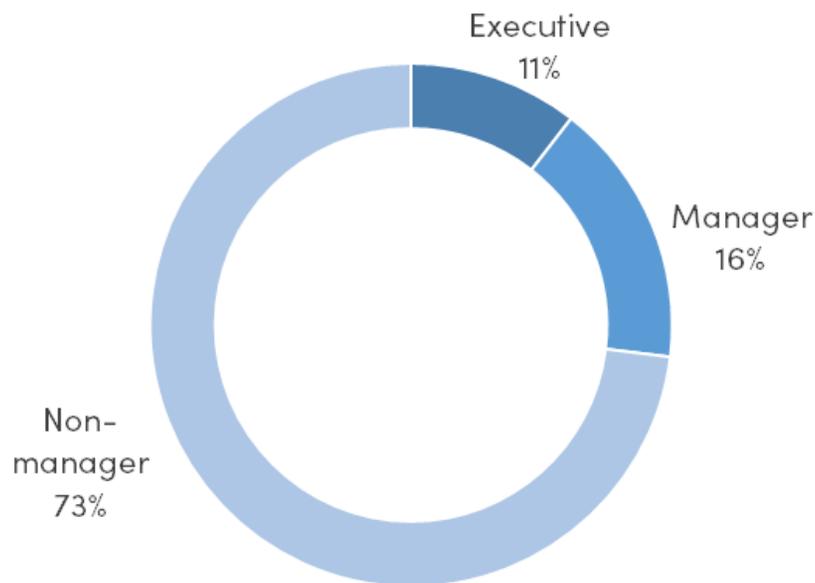
Respondent Demographics

The Greater Madison Telework Survey 2021 was conducted online from July 20–August 16, 2021, and received **1,179 responses** from non-managers (73%), managers (16%) and executives (11%) in the region.

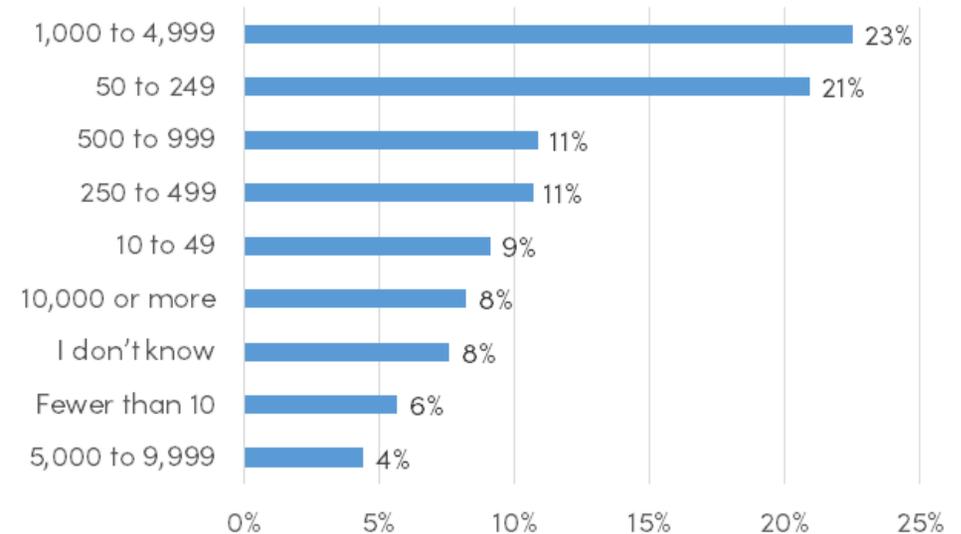
Organizations represented include both public and private employers ranging in size from fewer than ten staff to over ten thousand. Sixty-one percent of respondents were from the public sector.

Pre-pandemic workplace zip codes reported by respondents were concentrated in and around downtown Madison, with by far the largest percentage (40%) reporting 53703 in downtown Madison. Conversely, home zip codes were dispersed throughout Dane County and beyond.

Position



Number of Employees Across all Locations



Definitions

“During the pandemic” was defined as approximately April 2020–May 2021.

87% teleworked at least one day per week during the pandemic

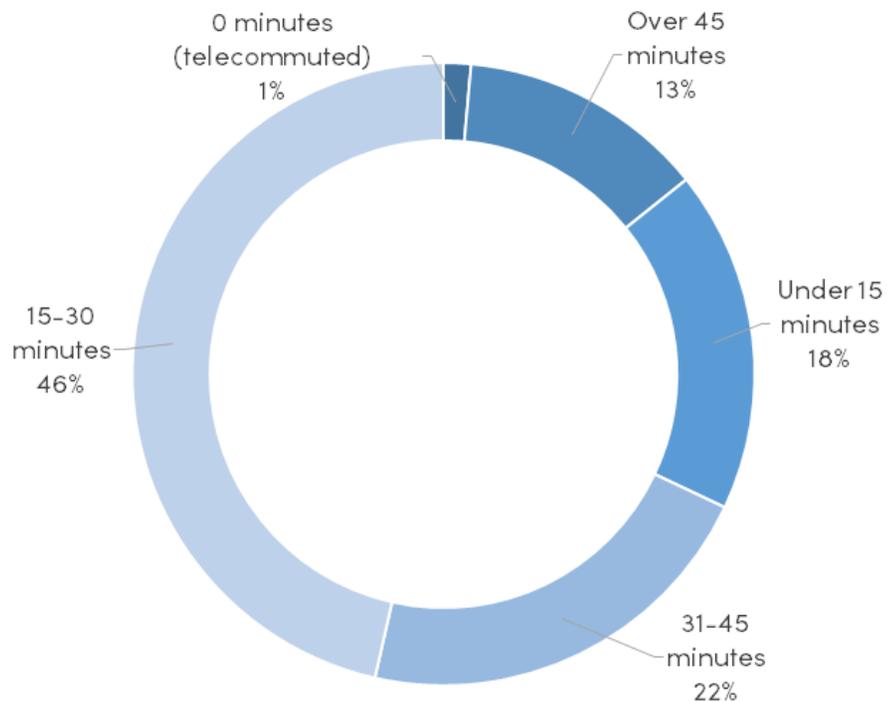
63% teleworked full-time (five+ days per week) during the pandemic

Pre-Pandemic Commuting & Transportation

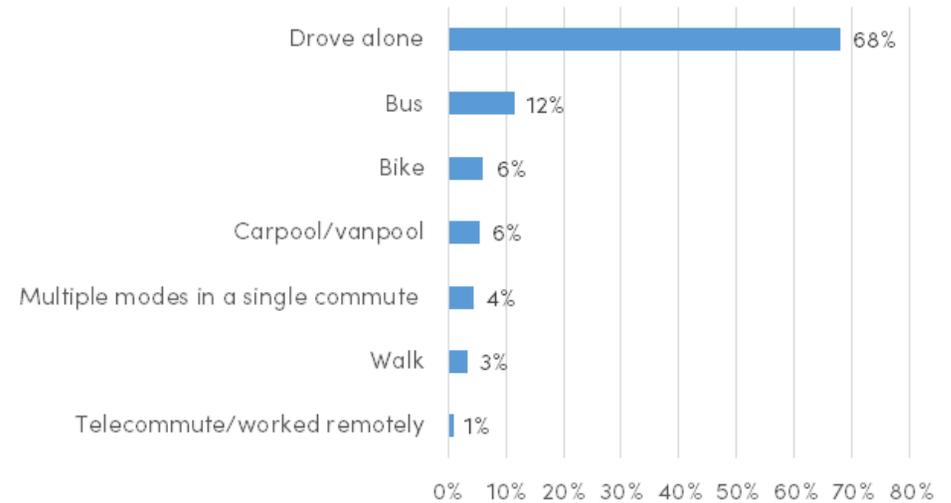
Respondents' pre-pandemic commuting habits were generally consistent with Dane County commute data as a whole. Sixty-eight percent reported driving alone to work prior to the pandemic, while 12% rode the bus, 6% biked, and 6% car/vanpooled. The largest percentage of respondents (46%) commuted between 15-30 minutes, while 35% commuted over 31 minutes.

Of the respondents who reported sometimes using another type of transportation to get to work, the top secondary modes were bicycle (13%), bus (11%) and car/vanpool (6%).

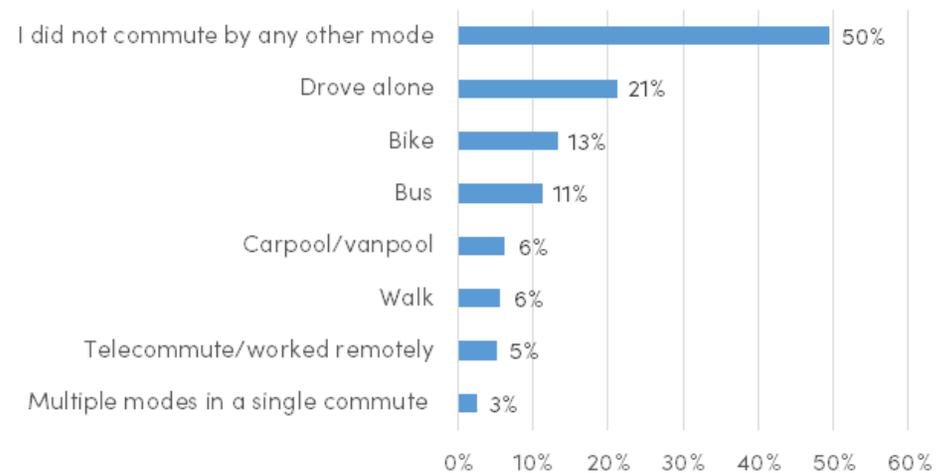
Duration of Door-to-Door Commute Pre-Pandemic



Typical Commute Mode Pre-Pandemic



Prior to COVID-19, did you sometimes commute by another mode? (Select all that apply.)



Perspectives from Executives & Managers

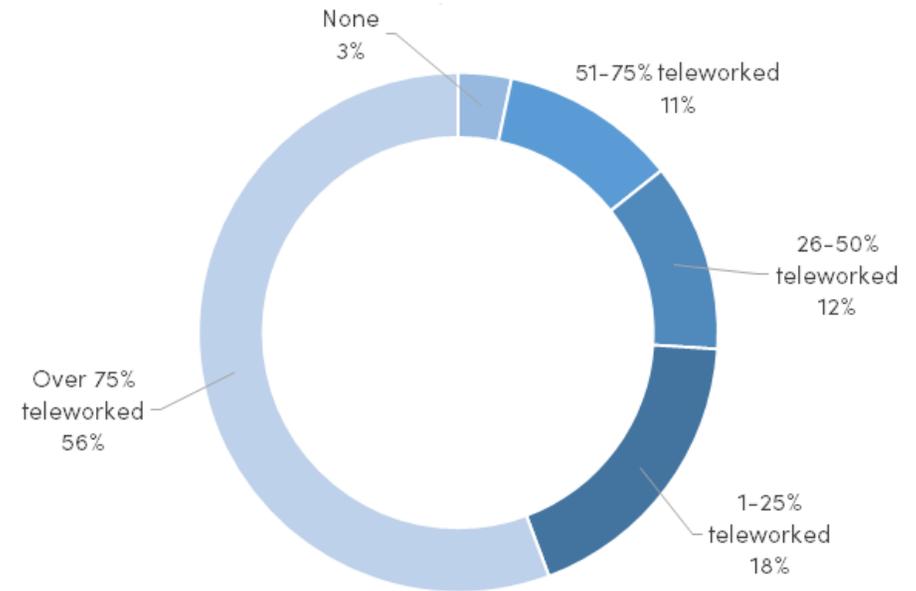
Prior to the pandemic, a common barrier to telework was the concern of many managers and executives about decreased productivity with a more dispersed workforce. Today, experiences during the pandemic have reduced those concerns and led many employers to plan for higher rates of both full- and part-time telework after the pandemic subsides.

“Our office was already overcrowded. We are using this opportunity to re-imagine use of the space and will implement hoteling to support hybrid work schedules.”

Of the 27% of survey respondents identifying as executives (11%) and managers (16%), 67% work at organizations where over half of the employees worked from home regularly during the pandemic. Seventy-three percent expect that more employees will work from home on a weekly basis in the future, and 25% expect that more employees will work from home nearly full-time. Of the responding executives and managers:

- » 71% are taking steps to make teleworking easier
- » 71% have or will soon have a telework policy in place
- » 51% view telework as a **sustainability strategy** (e.g., to reduce drive-alone commutes, to reduce greenhouse gas emissions, to reduce office energy use, etc.).
- » 49% view telework as a **business strategy** (e.g., to improve competitiveness, recruit/retain talent, etc.)

What percent of your organization's staff teleworked regularly from April 2020–May 2021?



What do non-managers say?

55% feel greater satisfaction with their employer than they did pre-pandemic

45% feel greater satisfaction with their job performance

56% report greater productivity and/or ability to concentrate on work tasks

- » 48% have a program that supports commute options such as bus, bike, carpool, vanpool and walking

The top benefits identified by executives and managers include:

- » 76% - Improved employee morale and satisfaction
- » 54% - More staff access to/participation in virtual professional development opportunities
- » 49% - More productivity and/or improved workflows and efficiency
- » 41% - More opportunities to hire diverse talent

The top challenges identified by executives and managers include:

- » 56% - Management challenges, including difficulty communicating, not knowing what staff are working on, and/or having to spend more time supervising staff
- » 42% - Company culture and morale declining

Despite identifying management challenges as a top concern, only 25% of responding executives and managers say that, “problems completing work on time or quality of work declining,” is a challenge.

Similarly, while 42% of executives and managers express concern about declining company culture and morale, only 12% of all survey respondents (including executives, managers, and non-managers), report feeling lower morale.

“It is still unclear what the benefits and costs are, since this was always seen as temporary. Expect to learn more in another year or so. I support telework and I think the real challenge is accessibility as defined through language, culture, ability. What are the culture cues and nuances that we need to understand and know working virtually, which is different when working in person, etc.”

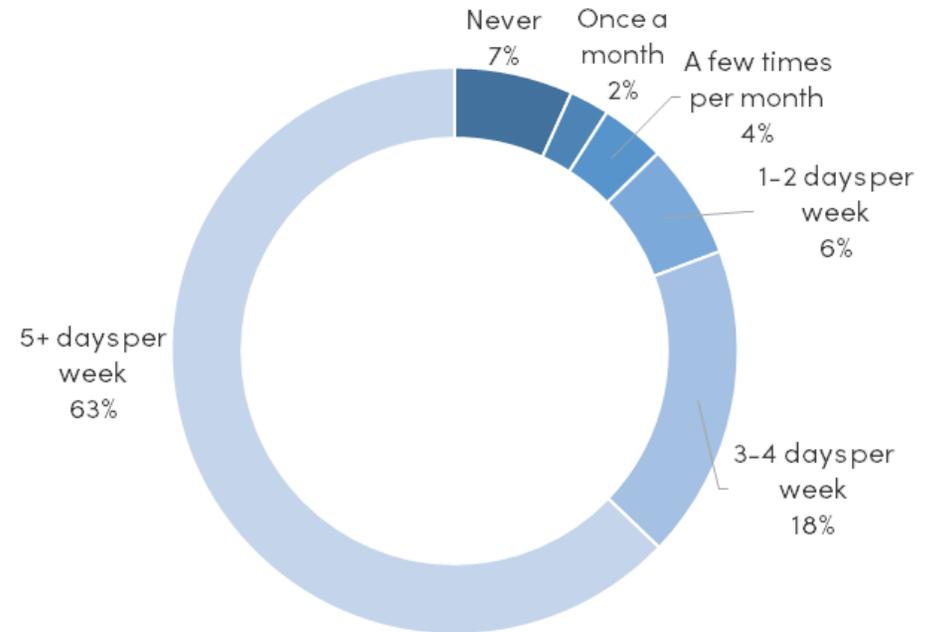
All Respondents: Pre- and Post-Pandemic Perspectives

When asked to compare their experience teleworking during the pandemic to their experience prior to the pandemic, the majority of respondents indicated feeling the same or better about a variety of work and life factors.

Compared to survey responses from June 2020, the percent of respondents indicating that their experience has been “better” or “somewhat better” when working from home during the pandemic, compared to their experience prior to the pandemic, increased for all of the factors below:

- » 86% feel the same or greater satisfaction with their employer
- » 81% feel the same or greater overall life satisfaction
- » 83% feel the same or greater satisfaction with their own job performance
- » 74% feel the same or better about their ability to access necessary job resources
- » 87% feel the same or better about their ability to understand work expectations and job goals
- » 79% feel the same or better about their ability to communicate with their manager
- » 76% feel the same or better about their ability to collaborate with staff at other organizations
- » 65% feel the same or better about their ability to collaborate with co-workers

During the pandemic (approx. April 2020–May 2021),
how often did you work from home?



36% of respondents reported experiencing no personal challenges as a result of teleworking more frequently

Top Challenges

The percent of respondents reporting a personal or professional challenge decreased for all options between 2020 and 2021.

Challenges reported include:

- » 30% - struggling to unplug (down from 35% in 2020)
- » 25% - anxiety about the COVID-19 pandemic (down from 53% in 2020)
- » 25% - home workspace that is not the same quality as that at work (down from 47% in 2020)
- » 24% - lack of access to equipment such as dual monitors, printers, etc. (down from 50% in 2020)
- » 21% - difficulty staying motivated (down from 31% in 2020)
- » 20% - feeling lonely (down from 30% in 2020)
- » 18% - frequent distractions from kids, pets, or other people at home (down from 34% in 2020)
- » 17% - internet connectivity issues (down from 39% in 2020)

“I’m in the public relations business and networking has always been critical to my success. I truly miss this, both professionally and personally.”

Top Benefits

Respondents reported benefits from telework at higher rates than challenges.

Benefits reported include:

- » 70% - more time with family, friends, pets, or to work on household projects/chores (up from 57% in 2020)
- » 70% - saving money by not commuting (same as 2020)
- » 69% - lowering their carbon footprint due to less driving (new option in 2021)
- » 59% - making lifestyle improvements such as sleeping more, exercising more, eating healthier, or learning new skills (new, combined option in 2021)
- » 59% - lower stress due to not commuting (up from 45% in 2020)
- » 56% - greater productivity and/or ability to concentrate on work tasks
- » 45% - higher quality and more comfortable work environment (new option in 2021)
- » 23% - Fewer interpersonal conflicts with co-workers and/or management (new option in 2021)

“I actually get more work done, am able to concentrate better, and am happier and healthier.”

Telework and Equity

In order to understand whether respondents' experiences have differed based on demographic characteristics, responses to questions about anticipated future barriers (Q24), personal challenges (Q25), and benefits (Q26) were filtered by respondents who identified as non-white; having a disability; non-male; parent/caregiver; and under the age of thirty-five (early career) [see page 84 of Appendix A]. Findings include:

Anticipated barriers to telework in the future (Q24):

- » Non-white respondents were more likely to report anticipating barriers to telework in the future. Among non-white respondents, the top anticipated barriers were lack of access to necessary equipment (37%); home workspace that is not the same quality as employer's workspace (31%); and internet connectivity issues (26%).
 - » Respondents under thirty-five years old were also more likely to report anticipating barriers in the future.
 - » Respondents who were slightly more likely to report that they do *not* anticipate any significant barriers were respondents with a disability, non-male respondents, and those who are parents/caregivers.

Personal challenges due to teleworking more frequently (Q25):

- » Non-white respondents were overall more likely to report personal and professional challenges resulting from increased telework. Significant differences for this group were:
 - » "Struggling to unplug from work": 36% non-white / 28% white
 - » "Feeling lonely": 25% non-white / 19% white
 - » "Missing the commute time I spent to exercise or relax": 20% non-white / 14% white
 - » "Anxiety about my job and/or stability of my company": 17% non-white / 8% white
 - » "Lower morale": 17% non-white / 11% white
- » Respondents with a disability were seven percentage points more likely to report feeling anxiety about their job and/or the stability of their company, and ten percentage points more likely to report feeling anxiety about the COVID-19 pandemic.
- » Non-male respondents were six percentage points more likely to report "Frequent distractions from kids, pets, or other people at home," and, "Missing the commute time I spent to exercise or relax."

6% of all survey respondents report that accommodations related to their disability have been a benefit of teleworking during the pandemic

"In my everyday challenge with having ADD, teleworking has made my ability to be more productive, less stressed, and more effective so much better. I am able to limit the distractions around me much better"

- » Respondents under age thirty-five were much more likely to report having difficulty staying motivated (29% compared with 19% of respondents over age thirty-five), and feeling lonely (27% compared with 18% of respondents over thirty-five).

Benefits due to teleworking more frequently (Q26):

- » Non-white respondents were less likely to report benefits, with the exception of saving money due to not commuting.
- » Respondents with a disability reported experiencing all benefits at a higher rate than those without. Significant differences for respondents with a disability include:
 - » “Lifestyle improvements such as sleeping more, exercising more, eating healthier, or learning new skills” - 12 percentage points higher than respondents without a disability
 - » “Higher quality and more comfortable work environment” - 14 percentage points higher than respondents without a disability
 - » “Fewer interpersonal conflicts with co-workers and/or management” - 14 percentage points higher than respondents without a disability
- » Other respondents who were more likely than their counterparts to report benefits from telework included non-male respondents; those with parent/caregiver responsibilities; and those under age thirty-five. Particular areas of difference for these groups include:
 - » “Lifestyle improvements such as sleeping more, exercising more, eating healthier, or learning new skills” - 11 percentage points higher for respondents under age thirty-five and for non-male respondents
 - » “Decreased stress due to not commuting” - 8 percentage points higher for non-male respondents
 - » “Higher quality and more comfortable work environment” - 9 percentage points higher for respondents under age thirty-five and 8 percentage points higher for non-male respondents
 - » “Saving money due to not commuting” - 8 percentage points higher for respondents with parent/caregiver responsibilities
 - » “More time with family, friends, pets, or to work on household chores” - 10 percentage points higher for respondents under age thirty-five and 7 percentage points higher for respondents with parent/caregiver responsibilities

“[I am] able to work even when there is a family issue like a sick child, where I need to be home because they aren’t at daycare, but can still work. Also cheaper living expenses not paying for daycare. Better morale for myself and my child who has a disability. Able to work more being home than having to leave work for the child with disabilities for disruptions at daycare.”

Telework and Sustainability

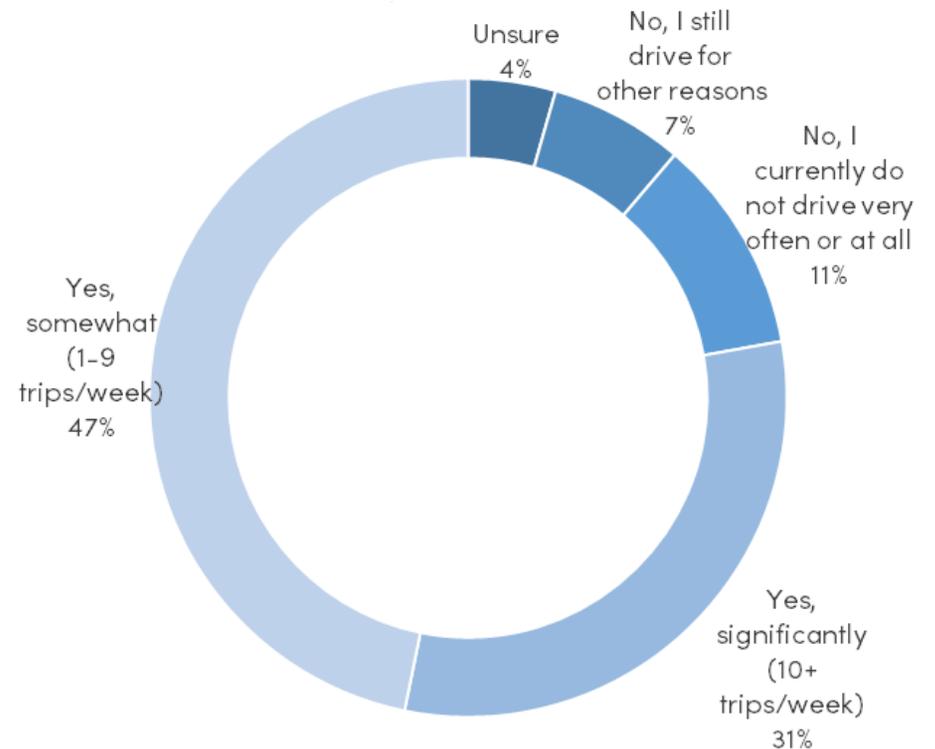
Telework is commonly considered a travel demand management strategy to reduce peak period traffic congestion and vehicle miles traveled (VMT) in cities and regions; however, its impact on VMT is difficult to assess due to the many variables involved, including the impacts that telework can have on trips taken outside of the commute, such as errands, childcare, and entertainment.

The ability of teleworkers to reduce their total VMT through telework may be influenced by many factors including how often they telework; the impact of telework on their trip chaining behavior (i.e., combining multiple trips into one, such as grocery shopping on the way home from work); the availability of convenient alternative transportation options near their homes; and the location of other frequent destinations relative to their home and workplace.

In order to explore how respondents are experiencing the relationship between telework and personal driving habits today, and what they expect that relationship to be in the future, this survey included several questions relating to individuals' and employers' views of the connection between telework, driving, and sustainability.

When asked to consider the benefits of telework, 69% of respondents said they have a lower carbon footprint due to less driving. When asked whether the amount they expect to telework in the future will help them reduce the amount of driving they do in a given week, 47% said it will help them reduce their weekly

Do you believe that teleworking can help you reduce the amount of driving that you do in a given week?



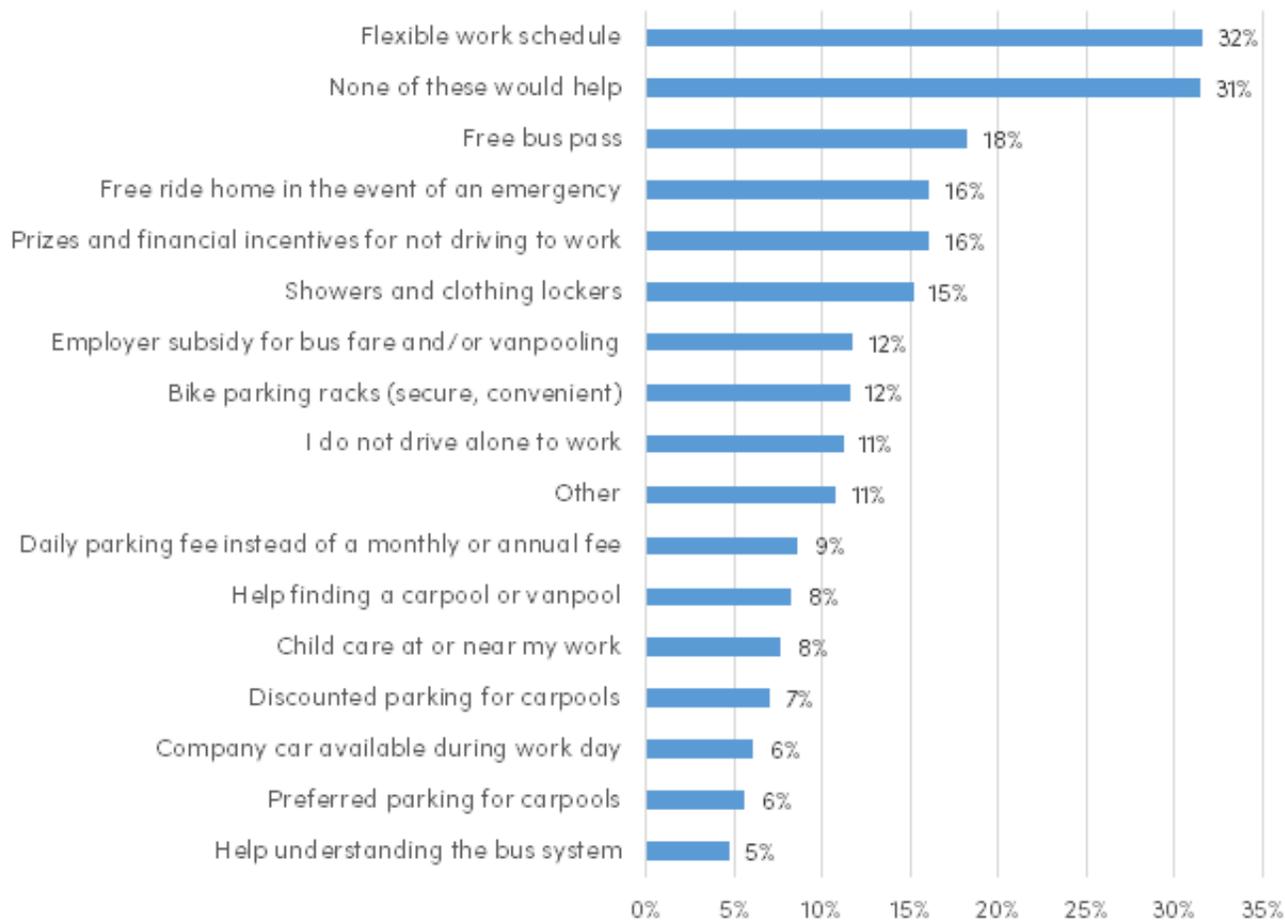
51%

of executives and managers say that their organization views telework as a sustainability strategy, such as to reduce drive-alone commutes, to reduce greenhouse gas emissions, to reduce office energy use, etc.

driving by 1-9 trips per week, and 31% said it will help them reduce their weekly driving by 10+ trips per week.

Many respondents who reported not normally commuting by bus, bike, car/vanpool or walking prior to the pandemic, also indicated that the ability to telework part-time during the week makes them more likely to choose a sustainable mode on the days that they commute to the office (see sidebar). Of these, 108 (11%) said they are more likely to bike; 108 (11%) are more likely to take the bus; 48 (5%) are more likely to carpool or vanpool; and 43 (4%) are more likely to walk.

What else would help you reduce how often you drive alone to work? Select all that apply:



Does (or would) teleworking for part of the week make you more likely to use any of the following on the days that you commute to the office? Select all that apply:

- 11%** Yes, bike
- 11%** Yes, bus
- 5%** Yes, carpool/vanpool
- 4%** Yes, walk

“If I lived on a bike or walk-safe street within 2 miles of work I’d definitely bike or walk.”

Preferences and Expectations

Among all respondents, 64% expect to telework at least one day per week when business returns to “normal,” with 28% expecting to telework between 1-2 days and 27% expecting to telework between 3-4 days. Twelve percent expect to telework on a monthly basis.

Forty-six percent of respondents say that their employer has a telework policy in place, and 44% are able to participate in the decision about how often they telework. Twenty-nine percent say that their employer will require a minimum number of days in the office each week.

Respondents’ preferred strategies to make telework most effective into the future are:

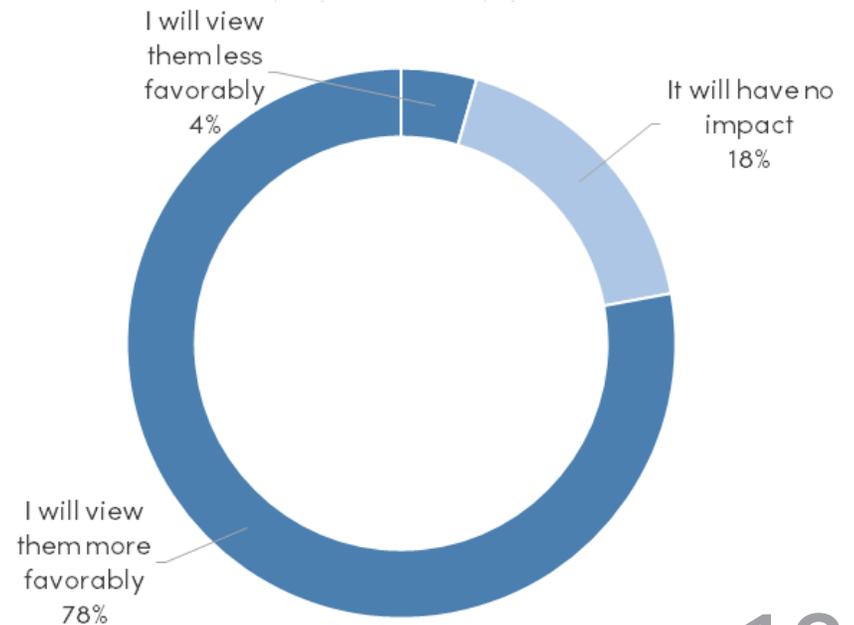
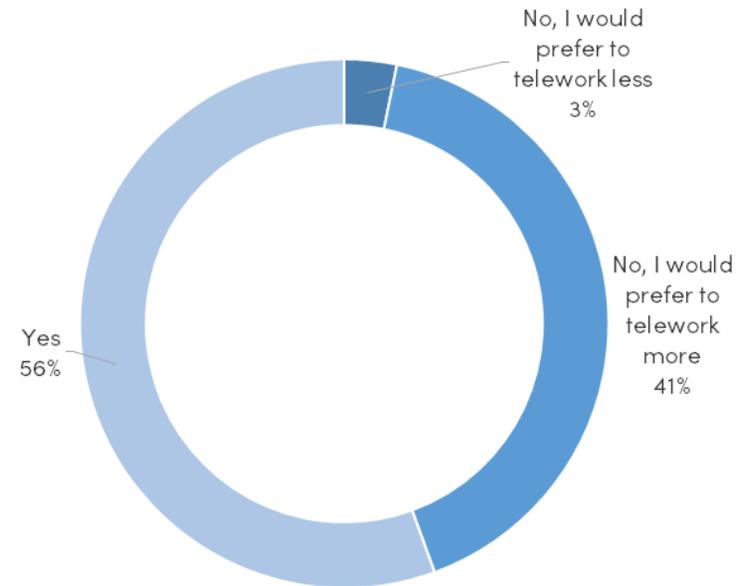
- » 57% - flexible start and end times to the day
- » 31% - designated “core” work hours, outside of which communications do not require an immediate response
- » 31% - in-person social events with co-workers

Of the respondents who will continue to be able to telework post-pandemic, the greatest barriers they anticipate include:

- » 29% - Home workspace that is not the same quality as my employer’s office space
- » 28% - Lack of access to equipment like dual monitors, printers, keyboards, etc.
- » 20% - Internet connectivity issues

How will having the option to telework impact your view of an employer? >>

Are you satisfied with the amount of telework you expect to do in the future?



Conclusion

These survey results demonstrate that telework is likely to be a common part of workplace structures in the Madison region beyond the pandemic, primarily as a part-time option. As seen when comparing survey results from 2020 and 2021, the challenges and benefits of telework are evolving as employees begin to telework at different rates and employers adjust to new demands. Relative to the long-term impact that telework may have on vehicle miles traveled in the region, responses indicate that telework may have the potential to help employees reduce their overall weekly driving, and in some cases choose alternate commute modes on their in-office days.

As communities continue to navigate the ever-changing circumstances of the COVID-19 pandemic and prepare for the future, this survey highlights opportunities to harness long-term benefits at the individual, workplace, and regional levels. Greater adoption of flexible workplace models that include both telework and flexible schedules offers greater opportunity to reduce driving and peak period congestion, in turn reducing peak-period roadway demand and expanding opportunities to prioritize investments in other modes of transportation.

Agencies and policymakers can help capture sustainability gains from the increase in telework by prioritizing land use and transportation decisions that support alternative transportation choices for trips beyond the commute. Employers can continue supporting telework over the long term while building a workplace culture that elevates telework as one of many sustainable commute options. Individuals can challenge themselves to use telework to reduce their weekly personal driving trips, and to commit to using alternative modes on the days they commute to the office.

By providing insights into the evolving nature of workplace structures, commute trends, and attitudes in the greater Madison region, these results highlight the potential for individuals, employers and communities to work together to capture a variety of transportation-related sustainability gains.