

SNAPSHOT

Madison Region Remote Work Survey: COVID-19 Impact



GREATER MADISON
mpo



Introduction

The Greater Madison MPO is the federally designated metropolitan planning organization (MPO) for the Madison urban area. The MPO's mission is to lead the collaborative planning and funding of a sustainable, equitable transportation system for the greater Madison region.

The MPO manages a transportation options program called Rideshare Etc., which connects individuals, businesses and organizations with convenient alternatives to driving alone. The program encourages walking, biking, public transit, ridesharing, telework and flex work as affordable and sustainable options to help reduce driving, congestion and greenhouse gas emissions in the greater Madison region.

On March 25, 2020, the statewide Safer at Home order went into effect in response to the COVID-19 pandemic. The order ceased all non-essential business except in cases where staff could work from home, and was eventually extended through May 26. The **Madison Region Remote Work Survey: COVID-19 Impact** was conducted online between June 9-30, 2020, to assess the impact on telework trends and attitudes among employees, managers and executives in the region (full results here: https://www.greatermadisonmpo.org/planning/documents/MadRegionCOVIDTeleworkSurvey_WebVersion.pdf).

This snapshot contains highlights from the survey designed to support regional information sharing and provide a local perspective to compare with national trends. Results identify top challenges and benefits experienced by respondents, implications for workplace structure and commuter transportation trends, and desired resources to support remote work moving forward.

Findings will inform the work of the MPO's Rideshare Etc. program to increase the frequency of remote work and flexible scheduling, and to connect employers and employees with the resources needed to help make these options a success. Results will also provide insights for area employers and agencies making decisions about the future of their workplaces and employee commuter programs.

The MPO would like to thank the Capital Area RPC, Madison Region Economic Partnership, Greater Madison Chamber of Commerce, Latino Chamber of Commerce, Madison Black Chamber of Commerce and UW-Madison Small Business Development Center for their help in reviewing the survey, and many others for their assistance with distribution.

"If you had asked before the pandemic, my response would be that [work from home] isn't possible. I now know it is possible, it can work, and there are benefits. There are also some challenges, but they are manageable."

After business returns to normal:

79% of respondents would like to continue working from home at least 1 day per week

69% say they will view an employer more favorably if given the option to work from home

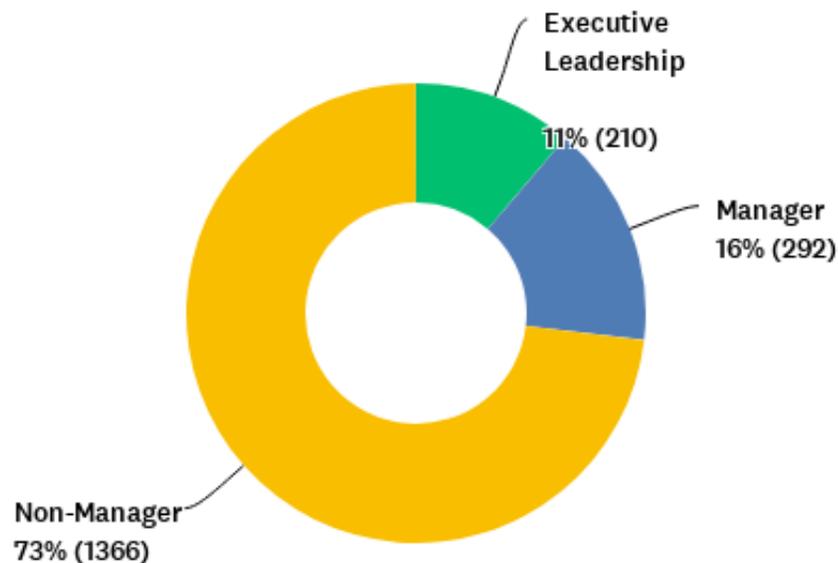
Key Findings

Respondent Demographics

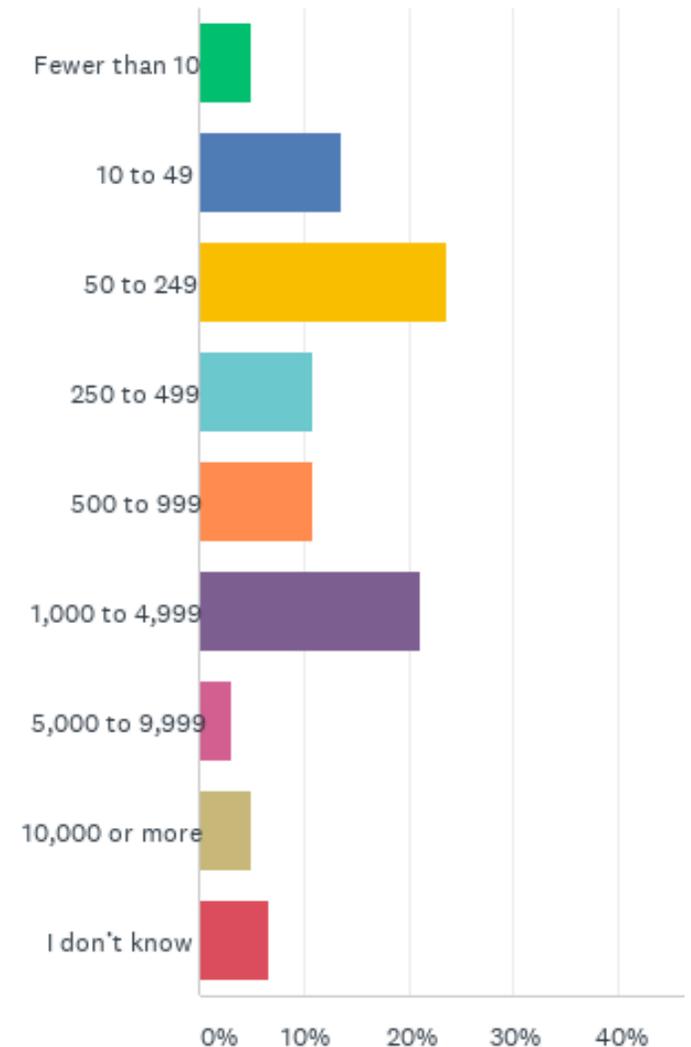
The Madison Region Remote Work Survey received **1,881 responses** from non-managers (73%), managers (16%) and executives (11%) throughout the region. Organizations represented include both public and private employers ranging in size from fewer than ten staff to over ten thousand.

The most common workplace zip code prior to the Safer at Home Order, reported by 38% of respondents, was 53703 in downtown Madison. Home zip codes were more dispersed throughout Dane County and beyond. The most common home zip code, reported by 12% of respondents, was 53704 in northeast Madison.

Position



Organization Size



Pre-Pandemic Trends & Expectations for the Future

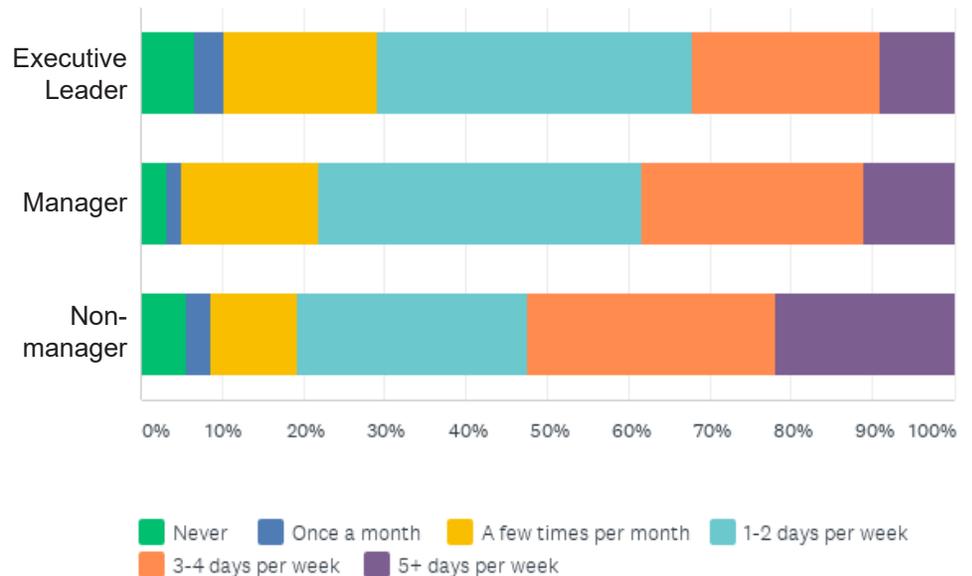
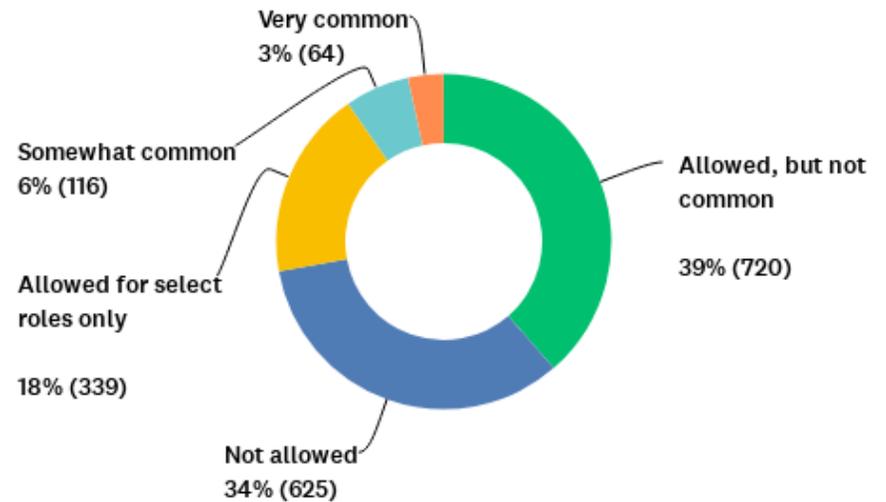
COVID-19 caused a massive shift in workplace norms for most employers and employees in the Madison region. **Prior to COVID-19, 78% of respondents never worked from home**, and 83% of executives and managers did not supervise employees who worked remotely. In contrast, **80% of all respondents worked from home at least one day per week between March 25 – May 26**, and **64% worked from home full-time**.

Despite the large scale of this adjustment, respondents experienced many benefits, and findings show significant demand for remote work to continue into the future. Of all respondents, **79% would like to continue working from home at least one day per week** after business returns to normal, and **69% will view an employer more favorably in the future if given the option to work from home**.

Among executives and managers, **69% report anticipating that more employees will work from home periodically when business returns to normal**, and 27% anticipate that more employees will work from home nearly full-time.

Given the choice, how frequently would you choose to work from home after business returns to normal?

How common was remote work at your organization prior to COVID-19?



Impact on Productivity

A common barrier to the more widespread adoption of remote work throughout the U.S. has been concern about potential negative impacts to employee productivity and management.

When executives and managers in the Madison region were asked how efficient they feel their workforce has been while working remotely during the pandemic, **nearly two in three responded that employees have been between 76-100% efficient**, with an additional 12% reporting that efficiency is better than ever.

Among non-managers, **74% reported feeling the same or greater satisfaction** with their personal job performance during this period, and **37% reported experiencing greater productivity**.

“I believe letting us work remotely increases productivity and also uses less of our employer’s resources. Win-win situation.”

Top Challenges

The greatest challenges of remote work identified by this survey reinforce the findings of many other surveys conducted around the nation. Taken together, these include:

1. **Lack of access to the necessary tools and resources** to work effectively. This includes computer equipment, a quality work space and reliable internet service.
2. **Barriers to communication and collaboration** among co-workers, as well as between staff and managers.
3. **Negative impacts to workplace culture** and social connectivity.

Compared to their experience before COVID-19:

78% of all respondents feel the **same or better** about their ability to communicate with their manager

73% feel the **same or better** about their ability to collaborate with individuals from other organizations

Common negative impacts reported by respondents:

- 53% | Anxiety about the pandemic
- 50% | Lack of access to equipment
- 47% | Lower quality home workspace
- 41% | Ability to collaborate with co-workers is worse or somewhat worse

Top Benefits

Findings demonstrate that respondents experienced higher levels of benefits compared to challenges. This indicates that the increased demand to work from home at least part-time following the pandemic is due to a variety of reasons, both personal and professional.

The top reported benefits **largely relate to saving time and money, and using these savings toward positive pursuits:**

- » 70% are saving money by not commuting;
- » 57% are spending more time with family and friends;
- » 54% have more time to sleep and do housework;
- » 45% have less stress due to not commuting; and,
- » Over one third are more productive at work; exercising more; and eating healthier.

As shown above, benefits related to not commuting are a significant theme. Results show that prior to the pandemic, 32% of respondents commuted over 30 minutes, and 44% typically commuted for 15-30 minutes.

Compared to their experience before COVID-19:

41% of respondents say their feelings of overall life satisfaction have improved

“I didn’t realize how much of the stress in my life was related to preparing for, and traveling to and from work.”

Implications for Sustainability in the Madison Region

The potential long-term impact of telework on transportation-related CO2 emissions is influenced by many factors. Based on the results of the 2017 Dane County Household Travel Survey, a 10% reduction in resident trips between home and work would result in an **estimated reduction of nearly 153,000 vehicle miles traveled, reducing CO2 emissions by 69 tons every weekday**. These trips can be a powerful way to reduce emissions, as they tend to be longer, and typically occur during AM and PM peak travel periods. The real impact of such a reduction in home-work trips may be lessened, however, by decisions about home location, or by an increase in separate driving trips to locations such as shopping and school that would otherwise have been combined with commuting. **As a result, an increased rate of remote work in the Madison region must be viewed and promoted in the context of other sustainable land use and transportation policies.**

Conclusion

Employers in the Madison region have a unique opportunity to act upon the lessons learned during this unprecedented time. Results indicate that the majority of office employees will desire to work from home on a weekly basis when business returns to normal, while balancing this with time in the office to work collaboratively and nurture social bonds.

Employers can use these results to identify improvements to policies, communications, resources and employee benefits that will support staff and managers in the successful continuation of regular remote work post-pandemic. Employers can position themselves to embrace this new normal by focusing on three main areas:

1. Developing a supportive company culture and flexible workplace model;
2. Providing the right tools and resources for staff and managers to thrive in a hybrid workplace; and
3. Maintaining open communication to learn from challenges and build upon successes.

By leveraging positive outcomes and adopting new policies and procedures to address challenges, employers can take advantage of the momentum of this incredibly (cont'd)

“I think pre-COVID, work policies treated employees as a monolith. I would love to see this heighten our perception of employees as individuals with different strengths, who can flourish in different environments.... So guidance on how to implement and manage various working environments in a cohesive organization would be welcome.” (Executive/manager)

Desired Resources

Non-Managers

Tips on improving a home office workspace (38%)

Better ways to collaborate with co-workers (37%)

Guidance on how to balance work and home life (23%)

Managers and Executives

Best practices training and assistance for managers (52%)

Best practices training and assistance for employees (49%)

Guidance on useful technologies (44%)

unique period in time. **Survey results demonstrate that offering a flexible workplace model that supports remote work will be a long-term strategy for talent recruitment and retention**, as well as an opportunity to improve workplace sustainability and productivity.

Additionally, if remote work is adopted at a higher rate following the pandemic-- and paired with other sustainable land use and transportation decisions-- it offers an opportunity to increase the quality of life in the Madison region by contributing to better air and water quality, less congestion, and fewer cost and land use burdens associated with demand for parking.

Organizations and public agencies that work with employers can use these findings to inform conversations about remote work over the long term. By connecting employers and employees in the Madison region with useful information, resources and opportunities, we can build upon the valuable new awareness generated by COVID-19 and maintain positive momentum for sustainable transportation in our region.

Additional Resources

The following is a sampling of national surveys conducted during this time:

- » “The Future of Remote Work: How the Pandemic Has Altered Expectations of Remote Work,” based on a June 2020 Morning Consult Survey: <https://go.morningconsult.com/rs/850-TAA-511/images/Remote%20Work%20Report%20-%20Morning%20Consult%20-%20Final.pdf>
- » “When Everyone Can Work from Home, What’s the Office For?,” based on the PwC U.S. Remote Work Survey, conducted June 2020: https://www.pwc.com/us/remotework?utm_campaign=sbpwc&utm_medium=site&utm_source=articletext
- » “PGi Survey Confirms Work from Home Could be the Next Normal,” based on a June 2020 survey: <https://www.prnewswire.com/news-releases/pgi-survey-confirms-work-from-home-could-be-the-next-normal-301083330.htm>