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Latest Capital COVID-19 Snapshot Indicates Long Term Shift in the Future of Work and Continued Uncertainty Around Reopening Worksites

The Fall 2021 Snapshot provides an update on the state of the Capital Region businesses' reopening plans, how vaccines and the Delta variant are affecting those plans, and what factors are currently driving employers' decisions on returning their employees to worksites.

Washington, D.C. – Local COVID-19 infection rates, employee health concerns, school and childcare status, and the reopening plans of peer organizations are the top influencers informing decisions regarding the return to worksites, according to a report released on Monday by the Greater Washington Partnership in collaboration with Ernst & Young LLP (EY US) entitled, "[Capital COVID-19 Snapshot: Safe Return to Worksites](#)". This study examined the state of the region's reopening plans, how vaccines and the Delta variant are affecting plans, and what factors most influence employers' decisions on returning to worksites across the Capital Region from Baltimore to Richmond.

This is the third iteration of the Capital COVID-19 Snapshot. The first survey, conducted in August 2020, found that many of the Capital Region's employers were uncertain about when and how to reopen, and whether public transit would be a safe and viable mode for their employees' commutes during the pandemic. The second iteration conducted in December 2020 revealed that employers expected more than three-quarters of employees would return onsite on a typical workday by Fall 2021 and listed the availability of a COVID-19 vaccine, employee health concerns, and state and/or local mandates as major factors influencing the decision of when to bring employees back to worksites.

Results from the Fall 2021 COVID-19 Snapshot reveal that the continuing pandemic, elevated levels of community transmission, and concern over COVID-19 variants have delayed the broader return to the office that was previously anticipated to have happened by now. As of September, just under half of employees are expected to be onsite on a typical workday on average across employers, compared to last winter's prediction that three-quarters of employees would be on site by this time. The longer the pandemic continues, the more likely that work from home and hybrid offices will stick around as entrenched norms in the working world.

Throughout the pandemic, employers have been monitoring and following updated health guidance to try to make work environments safe and comfortable. As more worksites reopen, we asked what employers are doing this fall to keep employees safe and comfortable. Instituting a COVID-19 exposure quarantine policy, limiting the number of external visitors onsite, and requiring all staff to wear masks



onsite regardless of local mandates, were the top measures being adopted by many employers to ensure a safe and comfortable workplace.

“COVID-19 continues to challenge all of us to be flexible, ensuring our people are comfortable and can work safely, while also recognizing the enormous benefits of getting people back together in person,” said **Carmine Di Sibio, Global Chairman and CEO of EY**. “Business leaders across the region can utilize the findings in the Capital COVID-19 Snapshot to help get their people back into the office, and to think more strategically about what the future of work will look like beyond the pandemic. EY is proud to continue our support of this effort.”

Additionally, the results of this Snapshot are better understood in the context of the [Remote Work in the Capital Region](#) report published in February 2021, which sought to understand the impacts of different remote work scenarios, including a moderate and substantial shift to elevated levels of remote work. Through that study, also conducted by EY on behalf of the Greater Washington Partnership, it was projected that benefits of flexible and remote work were not felt evenly across the region or its residents, noting that public transit usage, as well as frontline and essential workers could be severely impacted.

“We know that the pandemic has magnified existing inequalities and resulted in new ones that impact everyone in our region regardless of zip code or industry,” said **JB Holston, CEO of the Greater Washington Partnership**. “The Capital COVID-19 Snapshot represents the Partnership’s ongoing commitment to being a convener and thought leader to provide insights that inform the decisions that will be felt by hundreds of thousands of people. While the situation is precarious and continuing to evolve, the Partnership’s members remain focused on collaborating to inclusively recover and grow.”

This survey explored four areas that impact employer decisions to ask their employees to return to worksites.

Reopening Worksites

- Results from the Fall 2021 COVID-19 Snapshot demonstrate that most employees represented in the survey are still teleworking all or most of the time.
- Employers estimate that the share of the workforce expected onsite will still grow over the next year, but at a slower pace than earlier predictions. On average, survey respondents expect that 68% of employees will be onsite on a typical workday by summer 2022.
- Over the next year, 38% of employers expect the amount of their employees’ telework will decrease while just over half expect it will stay about the same.
- This fall, the top influencing drivers that informed return-to-worksit decisions included local COVID-19 infection rates, employee health concerns, school and childcare status, and the reopening plans of peer organizations.

Keeping Worksites Safe





- Though employers are monitoring COVID-19 infection rates to inform their reopening plans and taking measures to keep employees safe, 46% of respondents do not expect to require employees to get the COVID-19 vaccine while 54% will require employees to get the vaccine or submit to regular COVID testing.
- Across the Capital Region, employers estimated that 89% of their workforce was fully vaccinated, which is nearly 20 percentage points higher than state-wide averages in Maryland, DC, and Virginia for adults aged 18-64.

Capital Region Workforce

- Despite the uncertainty around the pace and scale of the return to worksites, 45% of surveyed employers expect to grow their workforce in the Capital Region over the next year.
- Roughly 4 in 10 employers have found it more difficult to find qualified employees in the Capital Region as compared to before the pandemic. Very few employers said it was easier to find qualified employees.
- Nearly half of employers across the Capital Region stated that they are willing to hire employees that primarily work remotely. About half of those employers who are willing to hire remote employees are only willing to do so if the employees live within the Capital Region and 32% of employers are not willing to hire remote employees at all.
- Although many employers expect to grow their workforce in the Capital Region over the next year, three-quarters of respondents are not planning to expand or to reduce their real estate footprint.

Commuting to Worksites

- 59% of respondents are anticipating that the share of employees who commute to their workplace by private car will increase over the next 12 months, 14% of employers expect increased use of public transportation, and 21% expect biking or walking to work to increase.
- 53% of employers reported that they already offer commuter benefits, 35% offer benefits to those who commute by private car, and 26% reported benefits for telework such as stipends for home office equipment.
- The vast majority of employers (86%) are not planning to increase benefits over the next year with benefits for teleworking the most likely to increase at 7%.

Last summer, we identified a gap in publicly accessible information about ridership and crowding levels during the pandemic. Working in partnership with the region's transit operators and the Metropolitan Washington Council of Governments (MWCOG), the Greater Washington Partnership and EY created the Capital COVID-19 Transit Tracker to help employers and employees make decisions about when and how to safely use transit. Today, with the widespread adoption of vaccines and mask-wearing, we know that using transit is just as safe as many other daily activities. Since publishing the Transit Tracker, most of

the major transit agencies around the region have started providing real-time information of their own on ridership and crowding levels.



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- WMATA [COVID-19 Public Information](#) and [Bus & Rail Crowding Information](#)
 - MDOT MTA [COVID-19 Dashboard](#) and [Transit Ridership during COVID](#)
 - GRTC [COVID-19 Information](#)
 - PlanRVA [Pandemic and Mobility Dashboard](#)
 - Amtrak and [COVID-19 Information](#)
 - VRE [Train Utilization Trends](#)
 - Google's [Crowdsourced Transit Predictions](#)

The Greater Washington Partnership – through the Capital COVID-19 Snapshot – is focused on increasing regional information and data sharing so employers and government leaders can make more informed decisions about reopening and addressing equity gaps that have only widened during the COVID-19 pandemic. The COVID-19 pandemic will be with us to varying degrees through the foreseeable future. We must use this time to reduce the inequitable impacts stemming from future remote work offerings to ensure that we recover as one region, stronger and more inclusive.

This survey was conducted in collaboration with public, private, and nonprofit organizations encompassing employers that span the Capital Region. These partners include: Arlington Chamber of Commerce, BWI Business Partnership, Chamber ALX, ChamberRVA, Commuter Choice Maryland, Connected DMV, DC Sustainable Transportation, Dulles Area Transportation Association, Federal City Council, Fredericksburg Regional Alliance, GRTC Transit System, Maryland Department of Transportation, Metropolitan Washington Council of Governments, Montgomery County Chamber of Commerce, Northern Virginia Chamber of Commerce, Northern Virginia Transportation Commission, Prince George's County Chamber of Commerce, Tysons Partnership, and WMATA.

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About the Greater Washington Partnership

The Greater Washington Partnership is a first-of-its-kind civic alliance of CEOs in the Region, drawing from the leading employers and entrepreneurs committed to making the Capital Region – from Baltimore to Richmond – one of the world's best places to live, work and thrive. Working in collaboration with leaders across our communities, the Partnership connects and leverages the region's extraordinary assets to advance inclusive, actionable solutions that strengthen the Capital Region as a leading global region and center for commerce and innovations.

