



Teleworking: changes in behaviours and habits

Survey among the Canadian
active population

March 2021



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01. Methodology



Methodology

Survey methodology

Online survey.

Respondent profile

Canadian adult active population from the Angus Reid panel.

Survey dates

March 2-8, 2021

Margin of error

For a probability sample of 1,914 respondents, the maximum margin of error is ± 2.2 percentage points, 19 times out of 20. However, as this survey is based on a non-probability sample, this information is provided for reference only.

Data processing and analysis

Were performed by the BDC Research and Market Intelligence team.

Note: Unless otherwise mentioned, calculation bases exclude respondents who preferred not to answer the question. Other appropriate exclusions are detailed on the different slides.



02. **Key highlights**

The practice of teleworking has – unsurprisingly – **increased significantly** since the beginning of the pandemic. Still, 41% are not teleworking at all, mainly because it is **not possible in their role**.



44%

are mainly **working remotely** at this time

Significantly higher among...

78%

Those working in the **technology, information and cultural** sector

50%

Younger respondents (less than 45 years old)

53%

Those working for a company with **500+ employees**

→ The main reason for **not** working remotely is the **impossibility to do so in one's role**.

80%

have **increased their use of teleworking** since the beginning of the pandemic

Significantly higher among...

88%

Those working in the **public services** sector

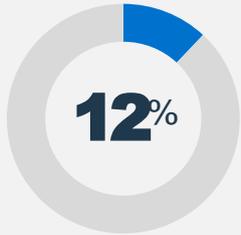
86%

Younger respondents (less than 45 years old)

84%

Full-time employees

Organizations adjusted to the pandemic by **promoting teleworking**. Employees do not know for sure that the **option of teleworking will still be offered** after the pandemic.



Before the pandemic



Now
(significantly higher)

Most organizations **encouraged telework** since the beginning of the pandemic

Once it is safe to return to the office...



Ideally



Realistically

41% would **prefer to work remotely as much as they do now**, although less than a third believe they will be allowed to do so



Ideally



Realistically

46% would **prefer to work mainly remotely**, although less than one third believe they will be allowed to do so

The pandemic, and more specifically teleworking, clearly had its **share of impacts**, both positive and negative, on the workplace.

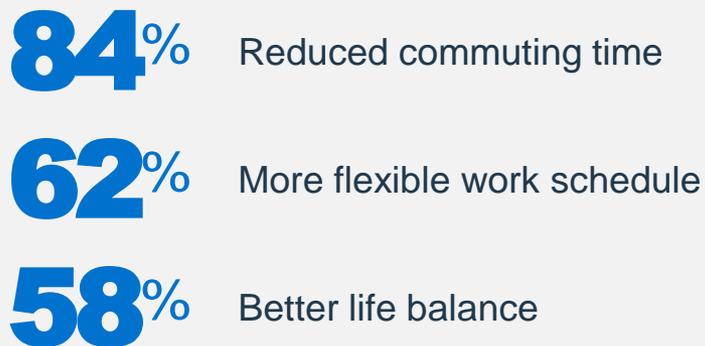


Impacts

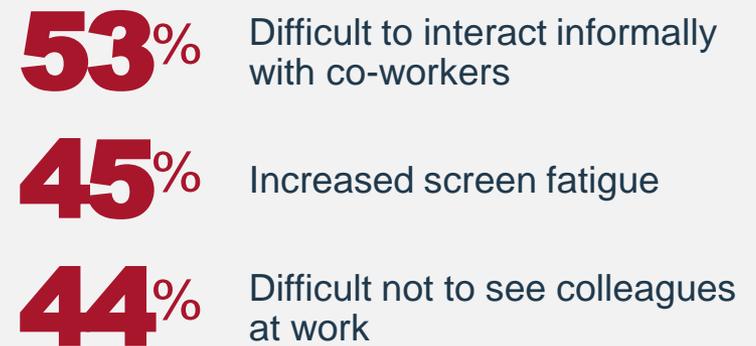


Such impacts are mentioned by a greater % of: **full-time employees**, those working for a company with **500+ employees** and those for whom teleworking is strongly **encouraged**.

Advantages of teleworking



Disadvantages of teleworking



Teleworking is **more common** in organizations and is now seen as a must-have. Most who work remotely said that the access to teleworking would be a **determining factor** in the future.



33%

Noted changes in the **working conditions** of teleworking employees at their workplace

Have noticed an **positive impact** on....



Work schedule



Work-related benefits



Salary



Performance bonus / Variable pay

Access to teleworking will be a **determining factor** for applying on or accepting a new job



Significantly more so for **women, full-time** employees, **younger** respondents and those working for **very large organizations** (2,000+ employees)



Out of the **28%** of respondents who moved since the beginning of the pandemic, **access to teleworking** has been a **determining factor** for about half.

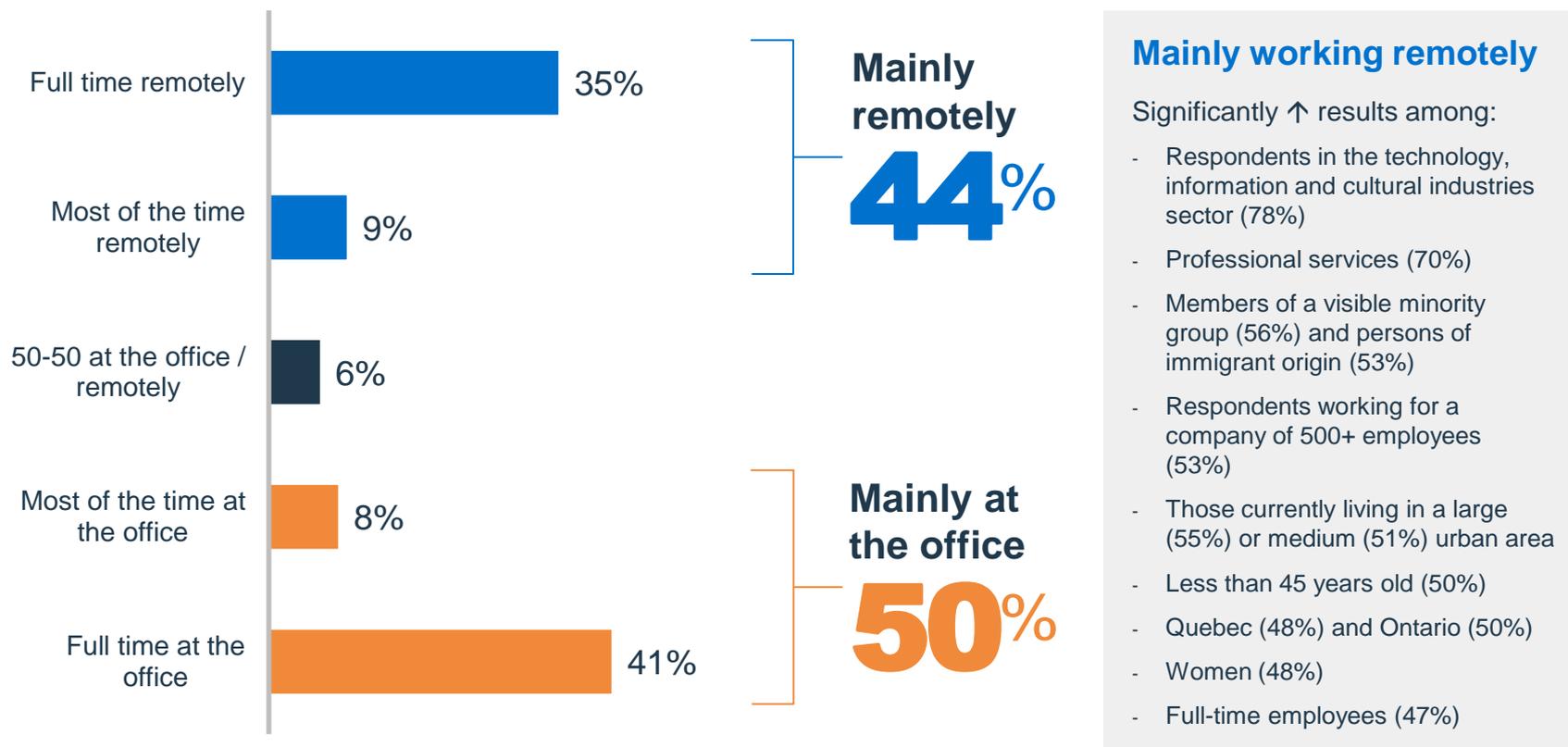


03. **Detailed results**

Results are divided: People tend to work remotely full time or at the office. A greater proportion of **women, Quebec and Ontario** residents, and **younger respondents** are mainly working remotely.



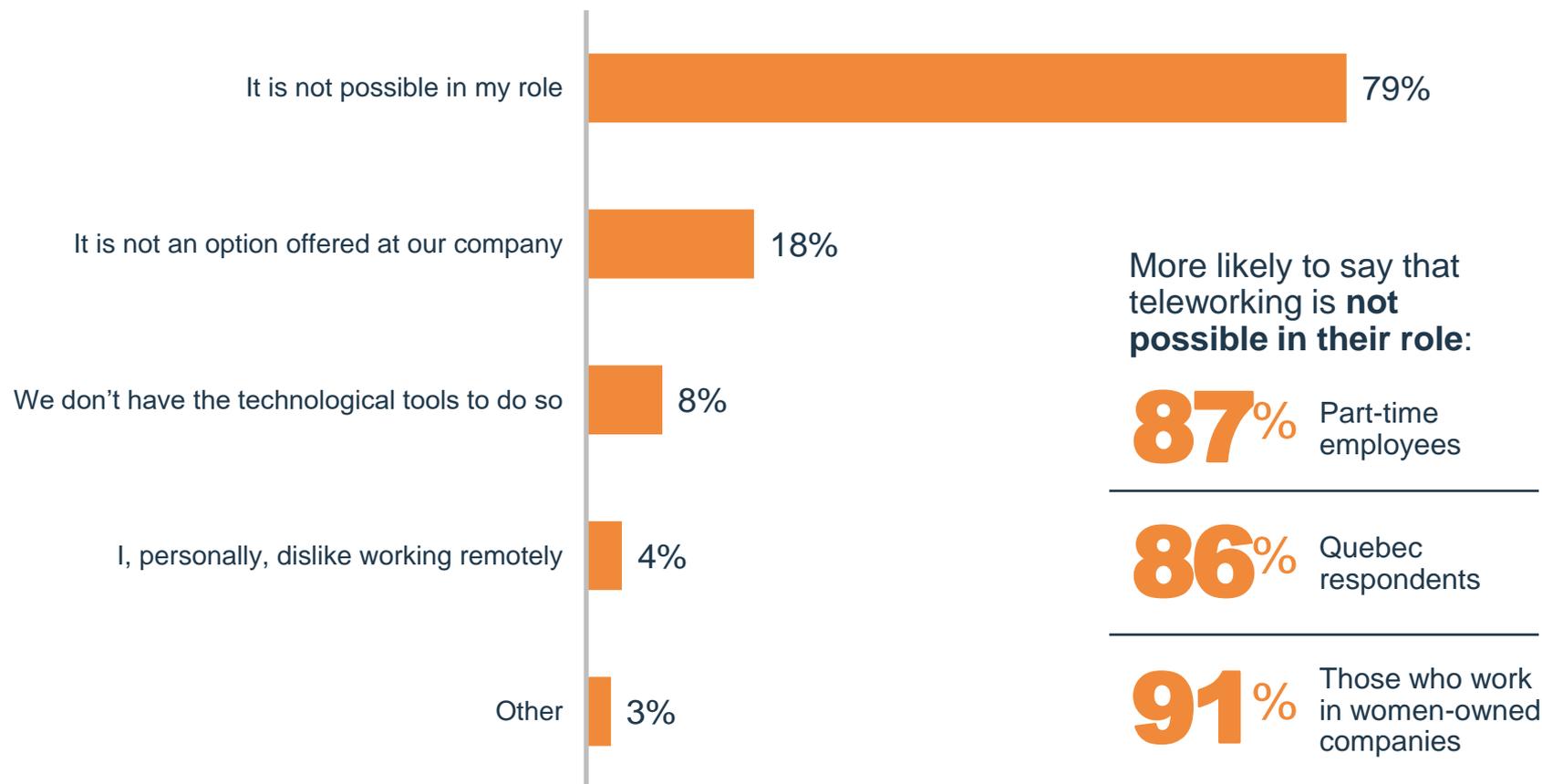
Q4. Are you **currently working**...?



In most cases, the reason given for not working remotely is that it is **not possible in that particular role**. Part-time employees and those in Quebec are more likely to mention this reason.



Q5. Why are you **not** currently working remotely?

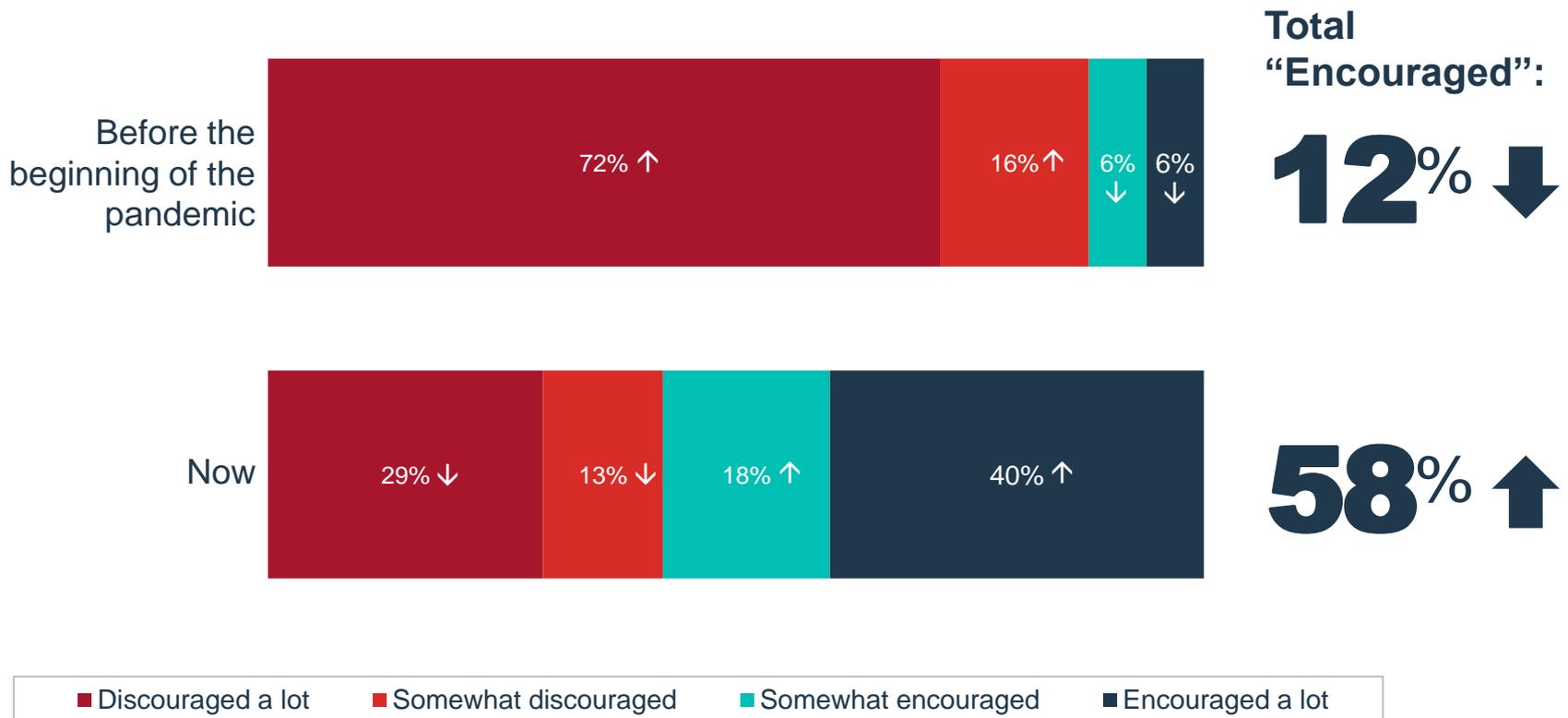


Base: Those who do not currently work remotely (n=783). Those who did not know were excluded from the calculation base. Multiple mentions were allowed, therefore total exceeds 100%.

Prior to the pandemic, about **one in ten** employees felt that their organization encouraged telework. That proportion has **increased significantly**; nearly three in five feel that way now.



Q6a. To what extent did and does your **organization encourage telework**?

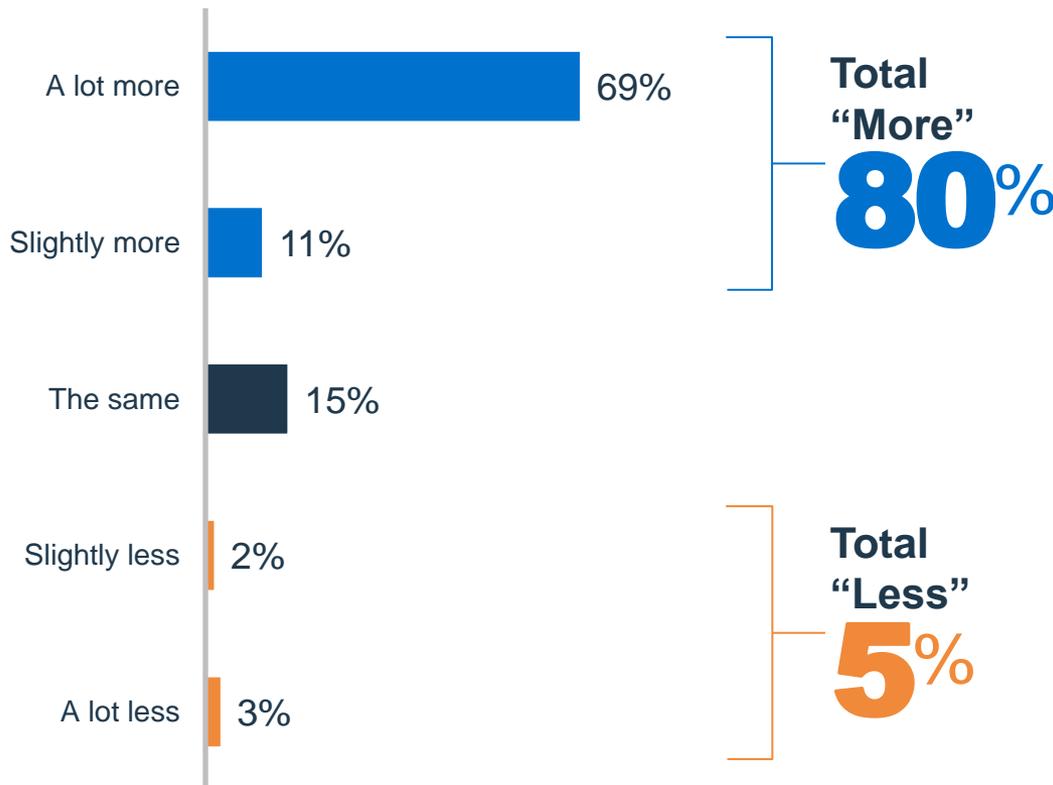


Base: All qualified respondents (n=1,743-1,787). Those who did not know were excluded from the calculation base. Arrows indicate statistically significant differences between the two time periods.

Most respondents said that they have been **teleworking more** since the beginning of the pandemic. Only one in five said that their situation has not changed or that they work remotely less.



Q6b. **Since the beginning of the COVID-19 crisis**, would you say that you've been working remotely...?



Working remotely more

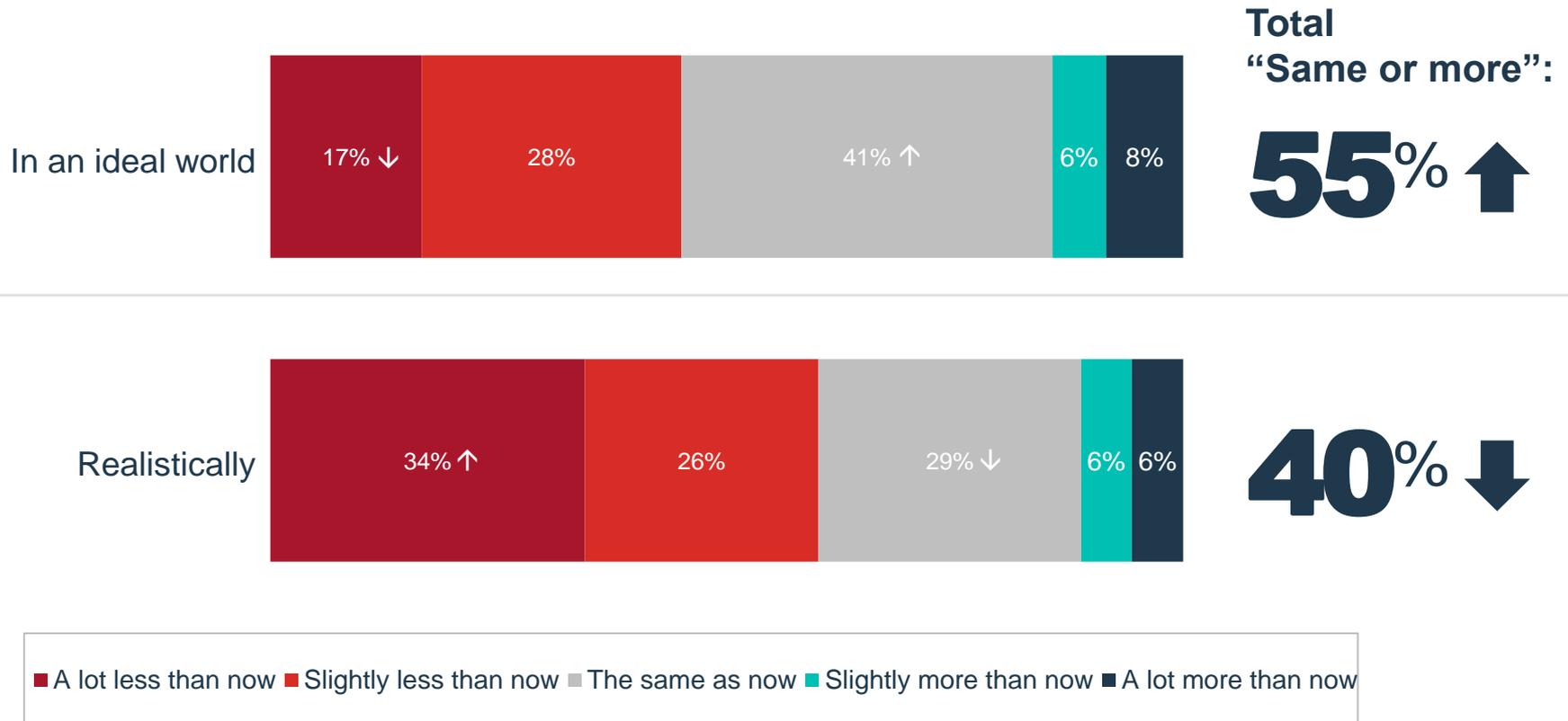
Significantly ↑ results among:

- Public services employees (88%)
- Those working for a company of 2,000+ employees (87%)
- Less than 45 years old (86%)
- Those currently living in a large urban centre (86%)
- Full-time employees (84%)
- Women (82%)
- Those working for a company owned mainly by men (78%)

When comparing the ideal situation to the realistic one, **more than half** would work remotely as often as they do now in an **ideal world**, while this proportion **drops to 40%** when assessing it realistically.



Q7. When it is **safe to return to the office full time**, how frequently would you be working remotely...?



Base: Those who currently work remotely (n=1,046-1,075). Those who did not know were excluded from the calculation base. Arrows indicate statistically significant differences between the time periods.

Nearly half of the respondents **would prefer to mainly work remotely** when it is safe to do so. However, here again, only about 3 in 10 believe they will be **allowed to do so**.



Q8. And how frequently would you work **remotely vs. at the office** once it is safe to return to the office full time?



Base: Those who currently work remotely (n=1,058-1,094). Those who did not know were excluded from the calculation base. Arrows indicate statistically significant differences between the two time periods.

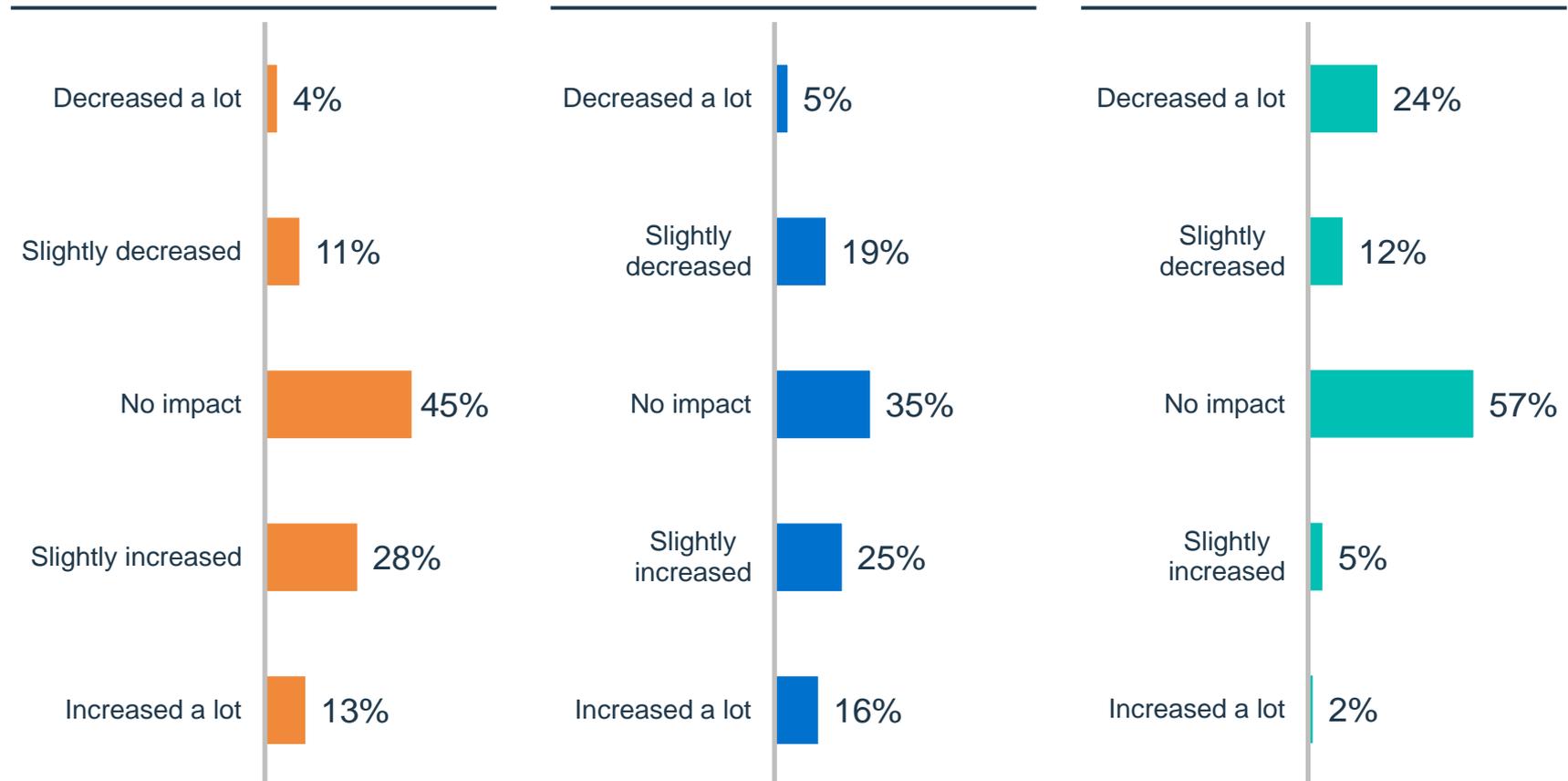
It seems that telework has had a **positive impact on absence rates**, and that it has often **increased the number of hours worked** as well. For efficiency, the results are mixed. 

Q9-Q10. Since the beginning of the COVID-19 crisis, what was the **impact** of teleworking in the following areas?

hours worked in a typical week

Efficiency

Absence rate



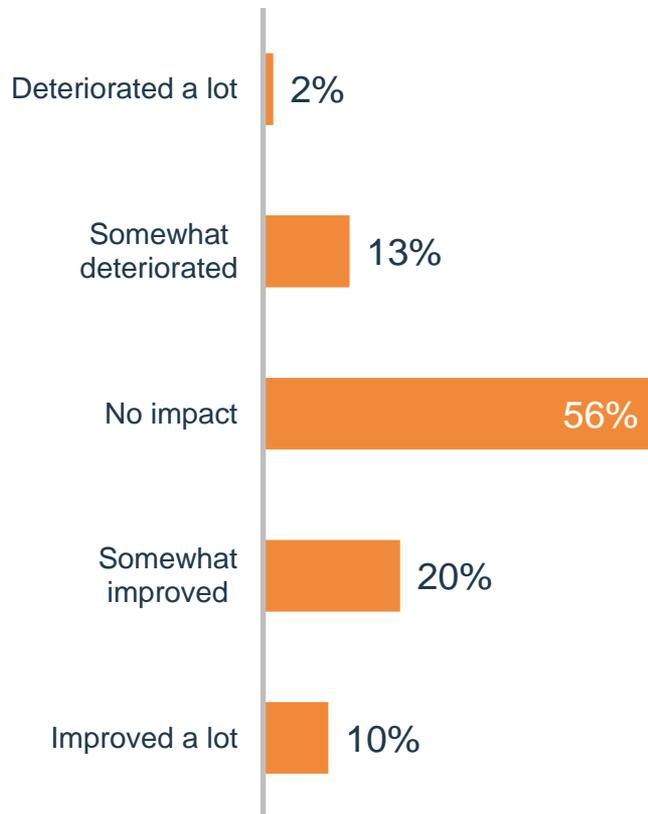
Base: Those who currently work remotely (n=1,088-1,104). Those who did not know were excluded from the calculation base.

Quality and organization of work have remained **quite stable** despite telework. Younger workers are more likely to have noticed a decrease in the organization of their work.

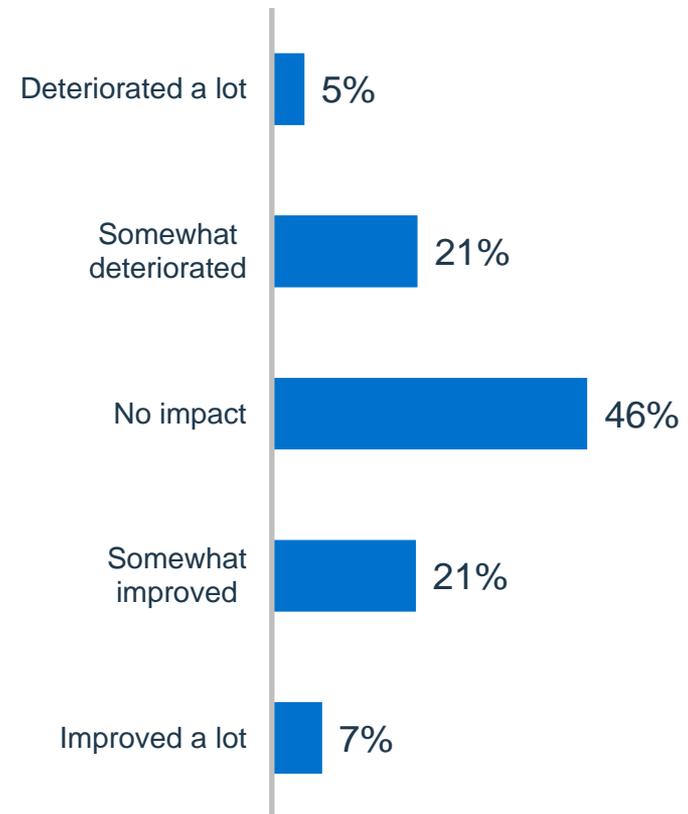


Q9-Q10. Since the beginning of the COVID-19 crisis, what was the **impact** of teleworking in the following areas?

Quality of the work



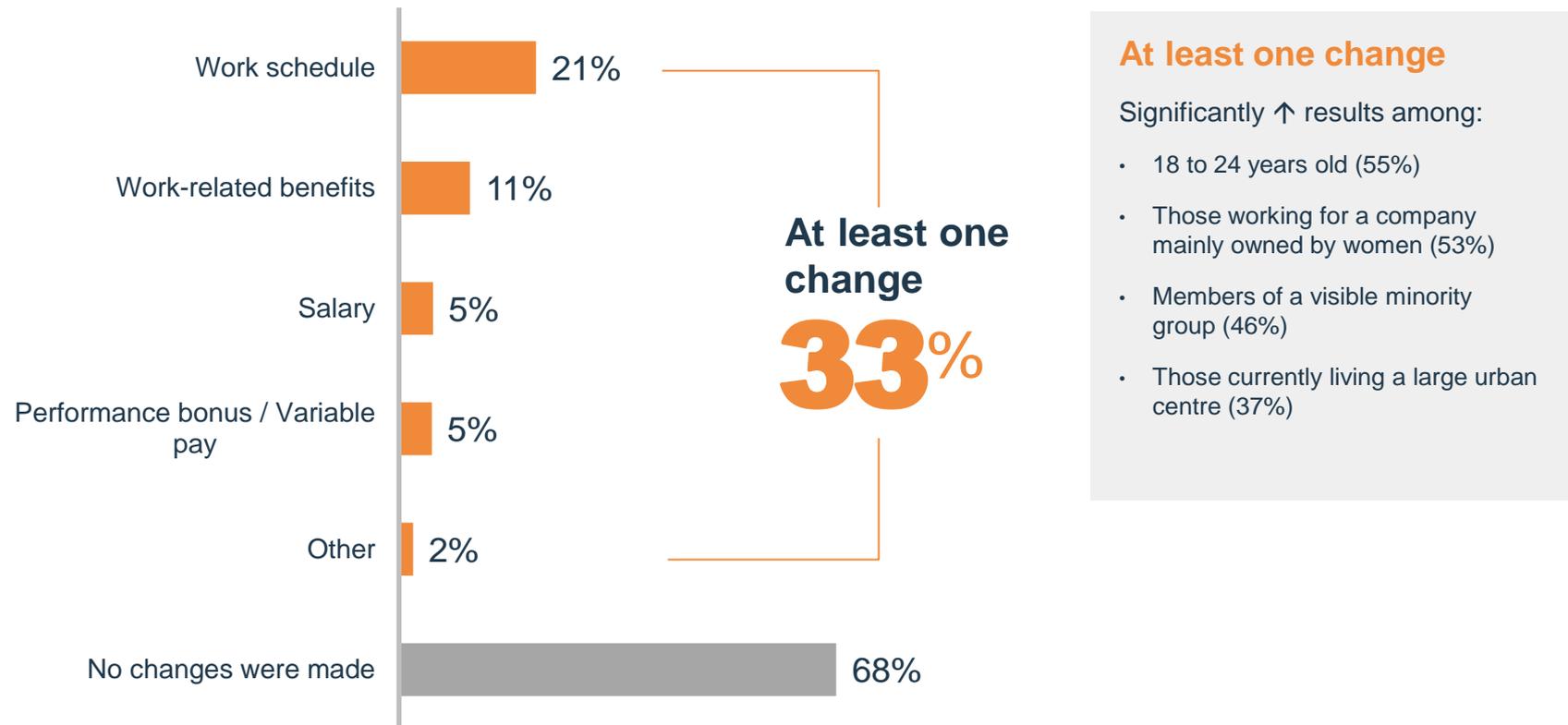
Organization of the workload



The majority **did not notice changes** in working conditions due to telework. However, younger respondents, members of a visible minority and women-owned business employees were more likely to.



Q12. To your knowledge, has your employer **changed the working conditions** of employees who telework on any of the following aspects?

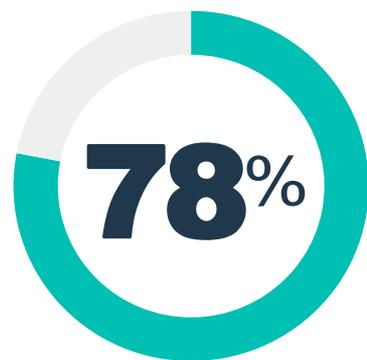


Base: Those who currently work remotely (n=1,035). Those who did not know were excluded from the calculation base. Multiple mentions were allowed, therefore total exceeds 100%.

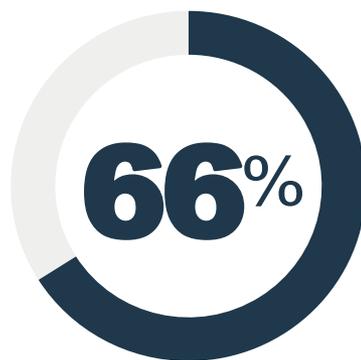
Changes in **benefits** and **work schedules** are mostly **positive**, while changes noted for **salary** are mostly **negative**. Bonuses appear to have been affected both negatively and positively by telework. 

Q13. How have **conditions** of teleworking employees **changed** in your company, to your knowledge?

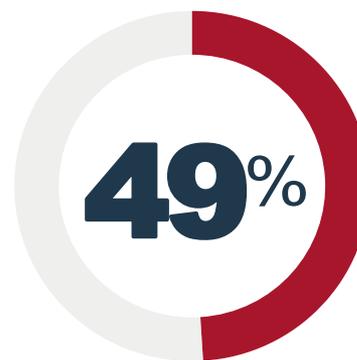
Proportion of “Increased/Improved”:



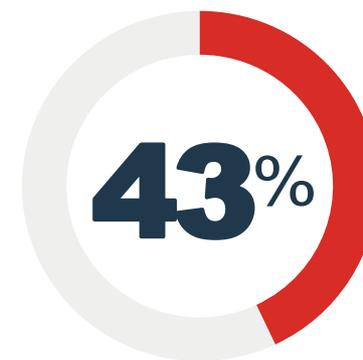
Work-related
benefits



Work
schedule



Performance bonus /
Variable pay

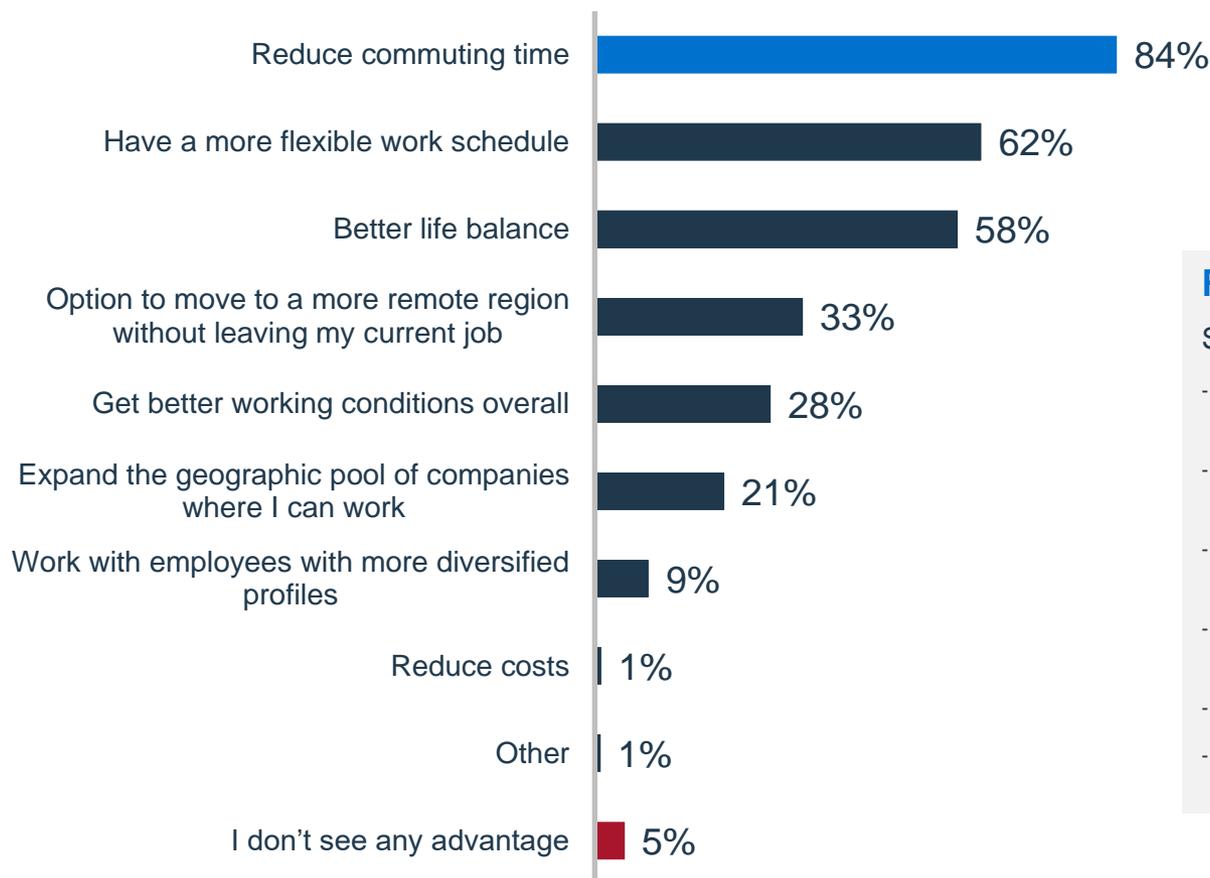


Salary

Reduced commute time is clearly what people value most about teleworking, followed by schedule flexibility and better work-life balance; the latter being significantly more appreciated by women.



Q14. In your opinion, what are the main **benefits of teleworking**?



Reduced commuting time

Significantly ↑ results among:

- Child of a person of immigrant origin (second generation) (91%)
- Those working for a company of 2,000+ employees (91%)
- Those in professional services, finance and insurance (89%)
- Those currently living in a medium-sized urban area (88%)
- Those in public services (87%)
- Full-time employees (86%)

Base: Those who currently work remotely (n=1,094). Those who did not know were excluded from the calculation base. Multiple mentions were allowed, therefore total exceeds 100%.

The main disadvantages of working remotely are the difficulty to **interact informally** or see co-workers and the **increased screen fatigue**.



Q15. And what would be the main **disadvantages of teleworking**, according to you?



Difficulty to interact informally with co-workers

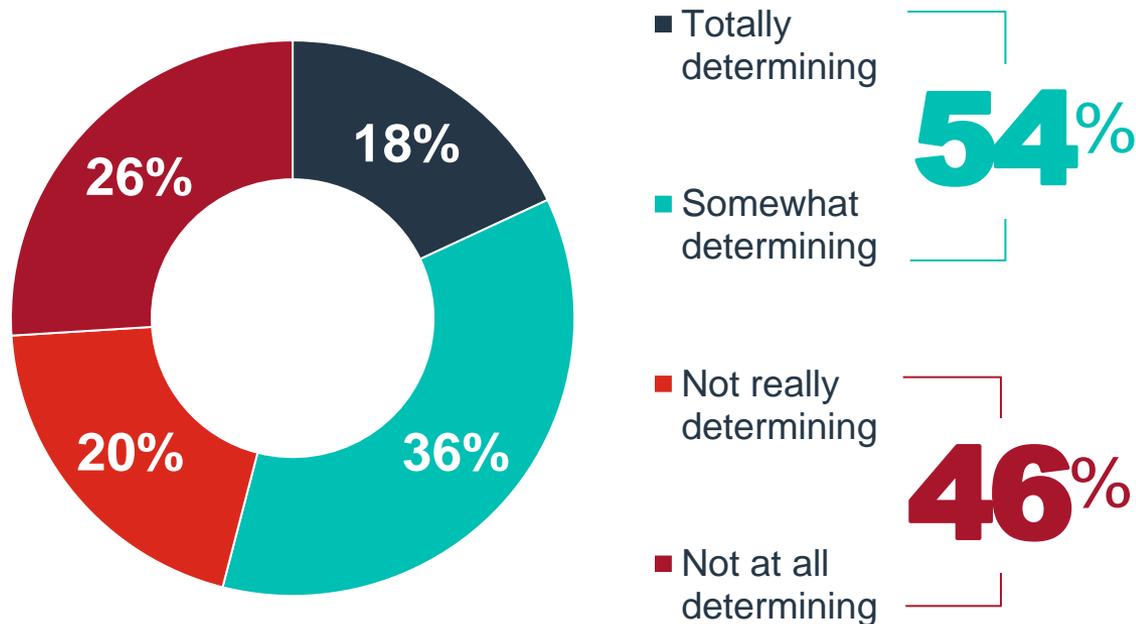
Significantly ↑ results among:

- 35 to 44 years old (62%)
- Those in public services (62%)
- Those currently living in a large urban centre (58%)
- Those whose organization discouraged telework a lot before the pandemic (57%)
- Men (57%)
- Full-time employees (56%)
- Those working for a company mainly owned by men (51%)

Base: Those who currently work remotely (n=1,096). Those who did not know were excluded from the calculation base. Multiple mentions were allowed, therefore total exceeds 100%.

Nearly half of respondents declared that being able to telework would be a **determining factor** in the future, especially among those who have been working remotely since the beginning of the pandemic. 

Q16. To what extent would being able to work remotely be a **determining factor** in your decision to apply on or accept a new job?



Determining

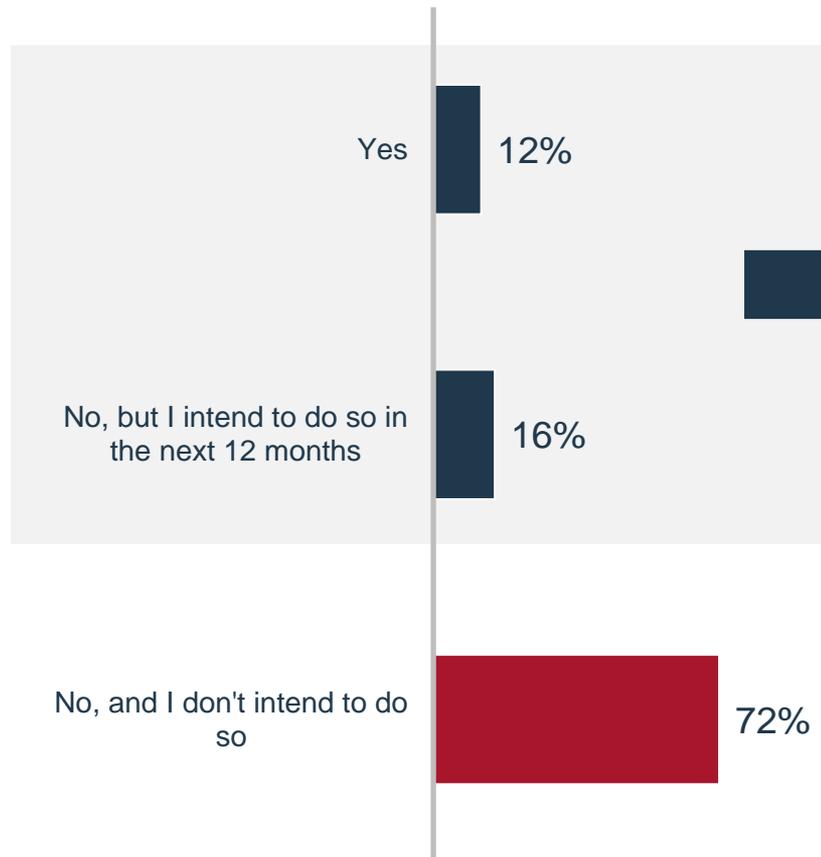
Significantly ↑ results among:

- Respondents working mainly remotely since the beginning of the pandemic (77%)
- Those currently living in a large urban centre (62%)
- Respondents working for a company of 2,000+ employees (60%)
- Ontario respondents (60%)
- Women (60%)
- Less than 45 years old respondents (59%)
- Full-time employees (55%)

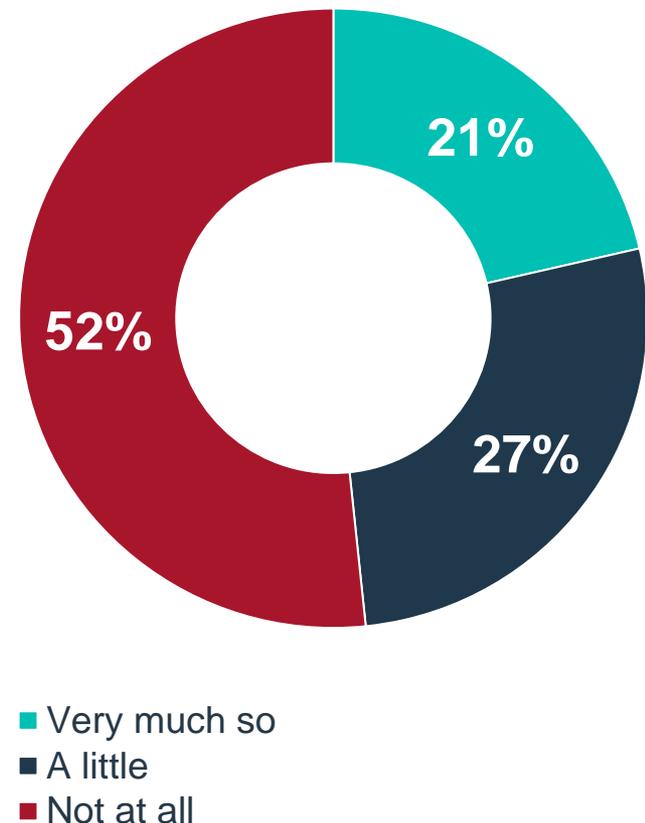
Among those who **have moved** since the beginning of the pandemic, nearly half confirmed that access to teleworking **influenced** their decision to do so to some extent.



Q17. Have you **moved** since the beginning of the pandemic?



Q18. To what extent has the **access to teleworking** been or is a factor in your **decision** to move?



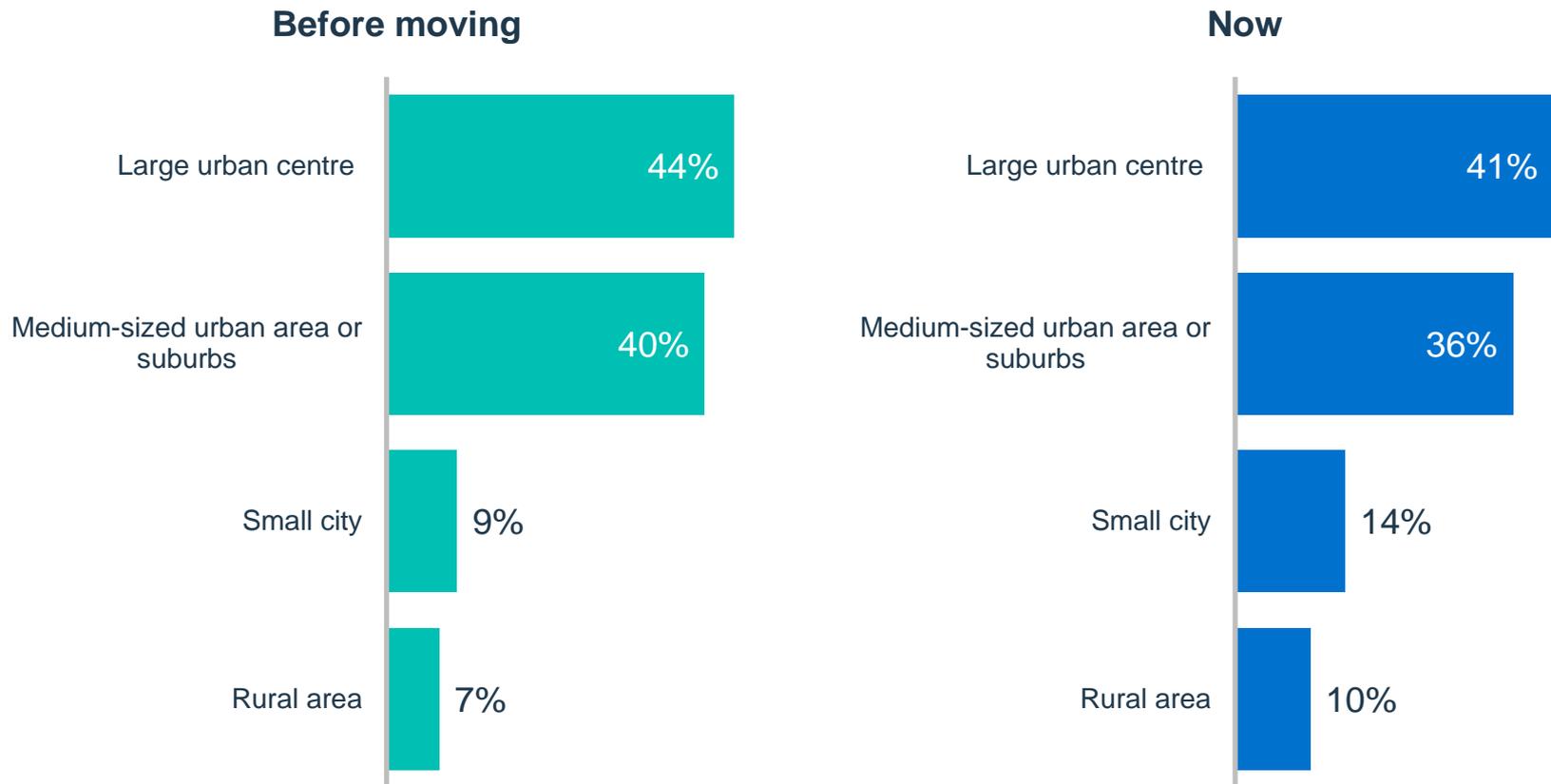
Base: Q17 = Those who currently work currently (n=1,127). Q18 = Those who moved since the pandemic or intend to move in the next 12 months (n=304). Those who did not know were excluded from the calculation base.

Among those who have **moved since the beginning** of the pandemic, there has been a shift to **small towns and rural areas**, although this is not statistically significant.



Q19. In what type of **agglomeration** do/did you live...?

THOSE WHO MOVED SINCE THE BEGINNING OF THE PANDEMIC



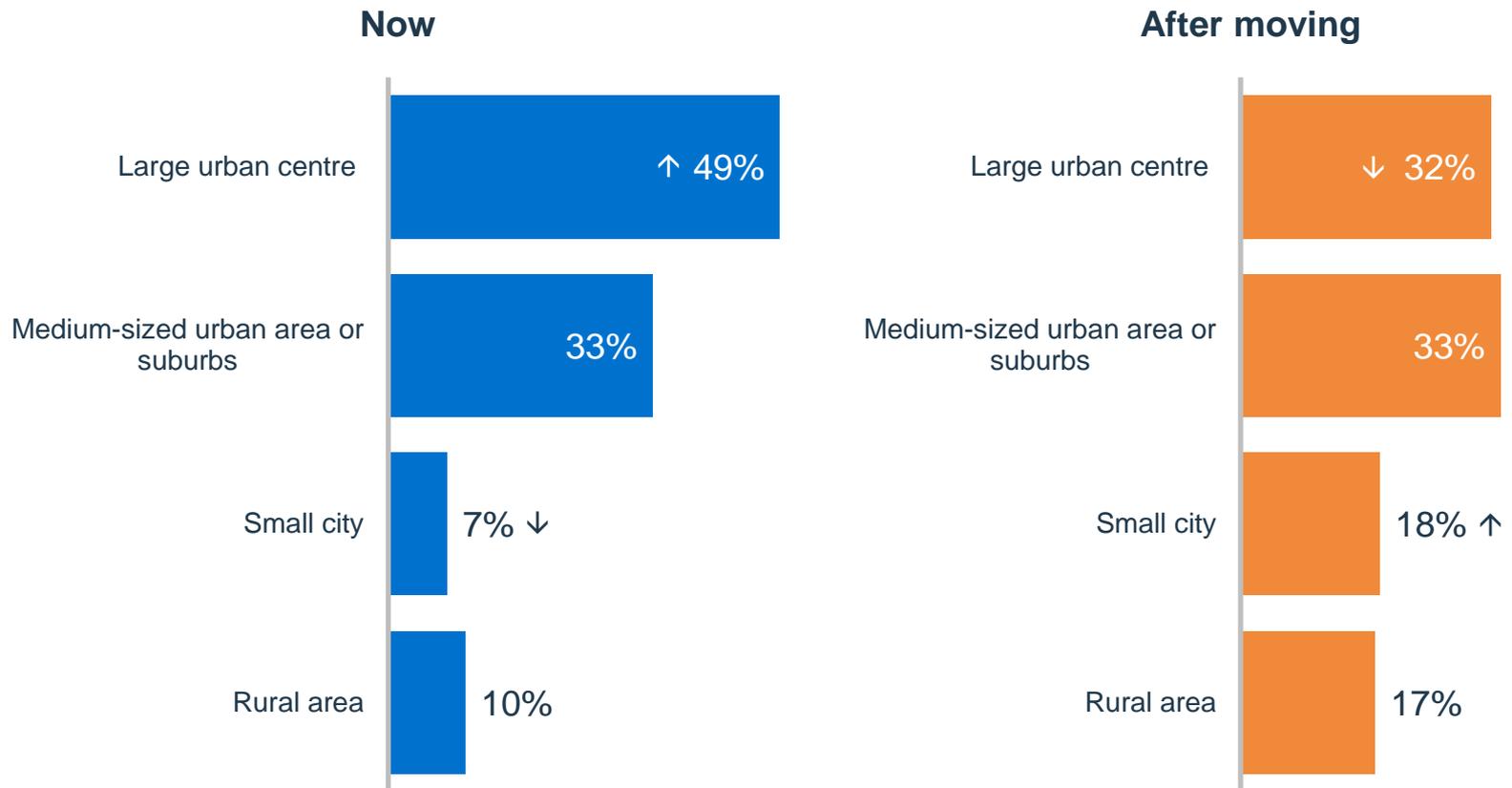
Base: Those who moved since the beginning of the pandemic (n=134-135). Those who did not know were excluded from the calculation base. Arrows indicate statistically significant differences between the two time periods.

The trend toward **smaller population centers** is confirmed in the intentions to move **over the next 12 months** and is statistically significant. Moreover, it is driven by the 45+ age group.



Q19. In what type of **agglomeration** do/did you live...?

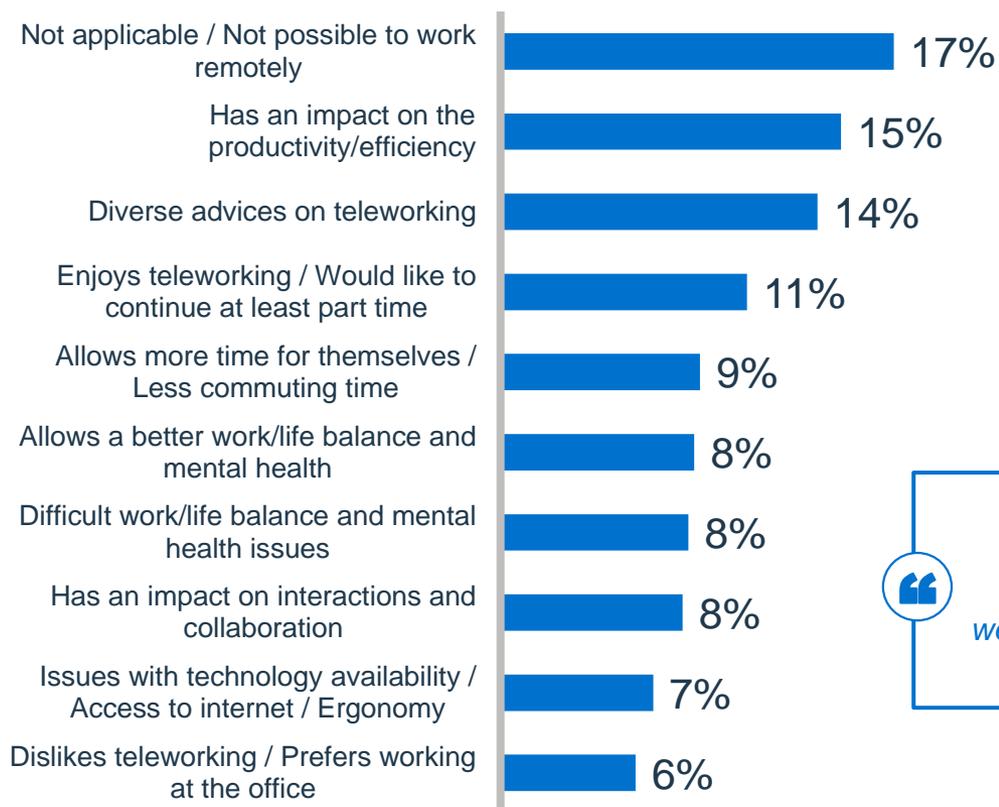
THOSE WHO INTEND TO MOVE IN THE NEXT 12 MONTHS



Base: Those who intend to move in the next 12 months (n=169-174). Those who did not know were excluded from the calculation base. Arrows indicate statistically significant differences between the two time periods.

Comments on teleworking are **varied** for both **positive and negative**.  Aside from access, many comment on the impact on **efficiency**, but still would like to **continue** beyond the crisis.

Q20. Would you like to **share comments** with us regarding teleworking (best practices, reflections, advice, etc.)?



You need to dedicate a working space in your home that you can leave after hours so it feels like you are off work. You also need to disconnect after work hours so you're not responding to emails outside of work hours. Weekly check-ins with manager/supervisor is good to make sure you are moving the project forward.

I'm glad more people see telework as possible now, but I think it is difficult to determine the effect of teleworking on wellbeing and productivity if your only point of reference is the pandemic.

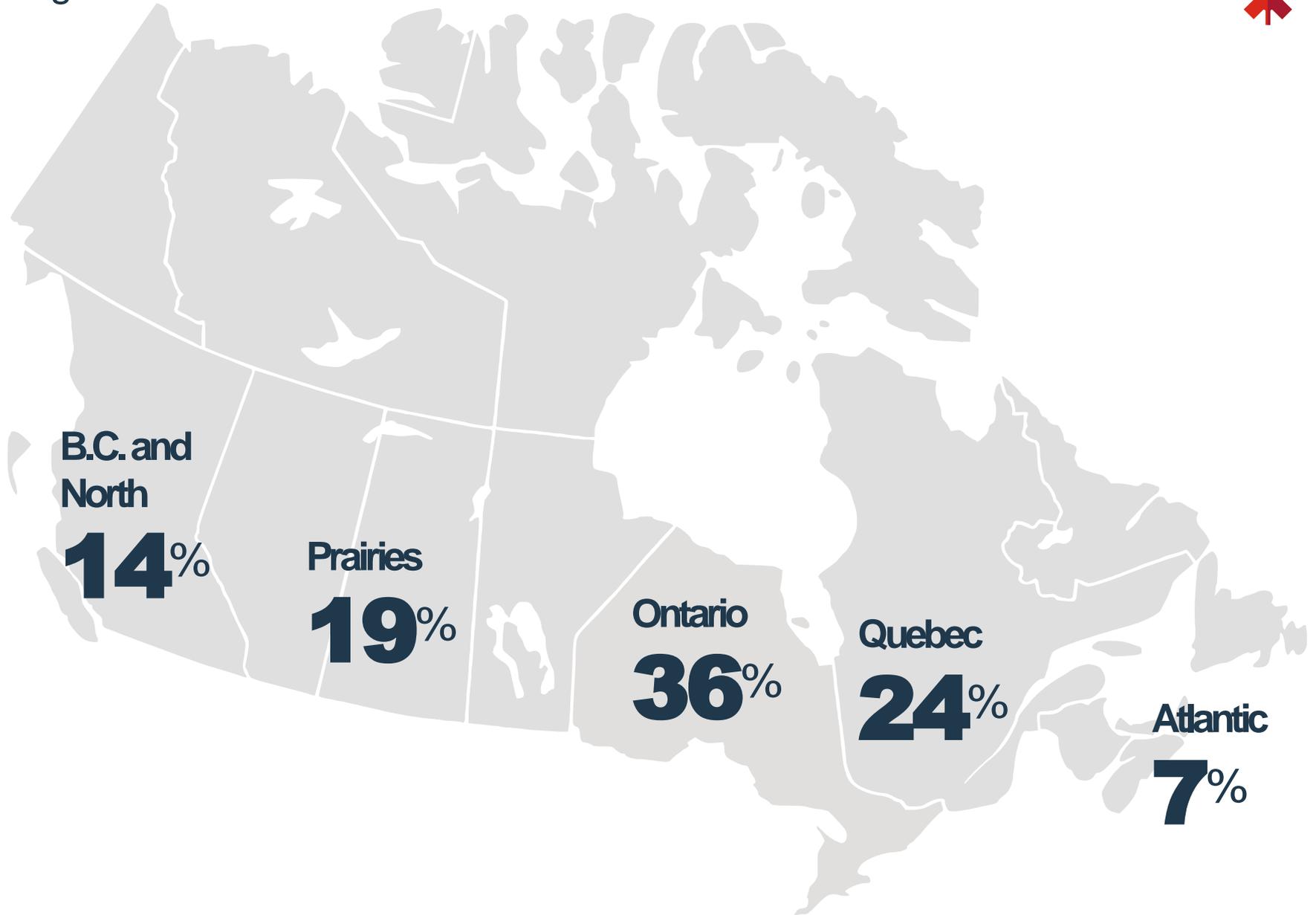


04.

**Respondent
profile**



Region

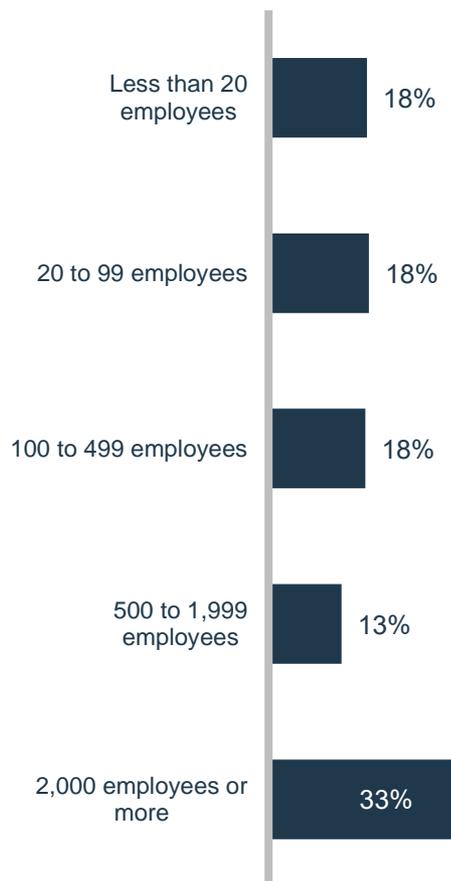


Base: All respondents (n=1,912).

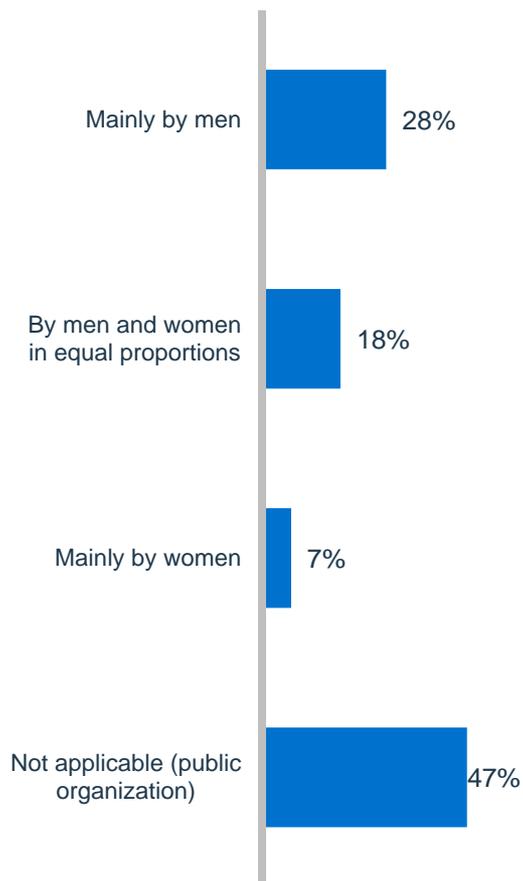
Number of employees, gender ownership and sector



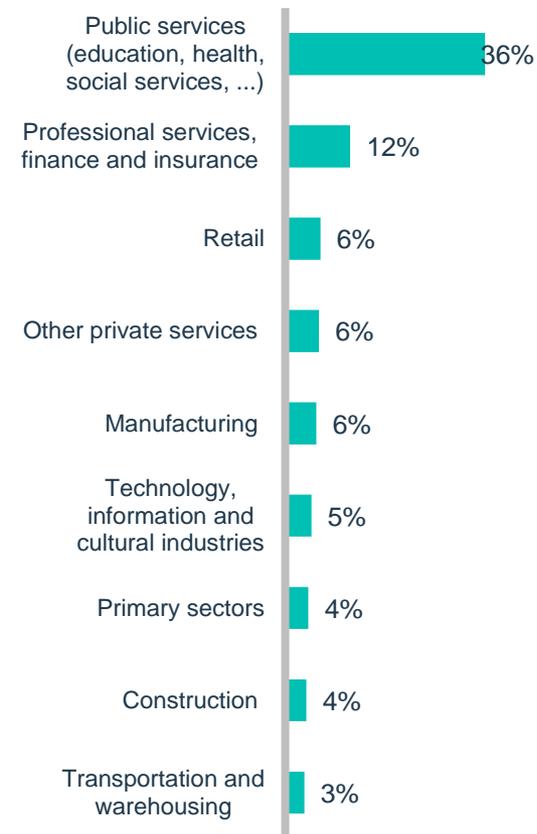
Number of employees



Gender ownership



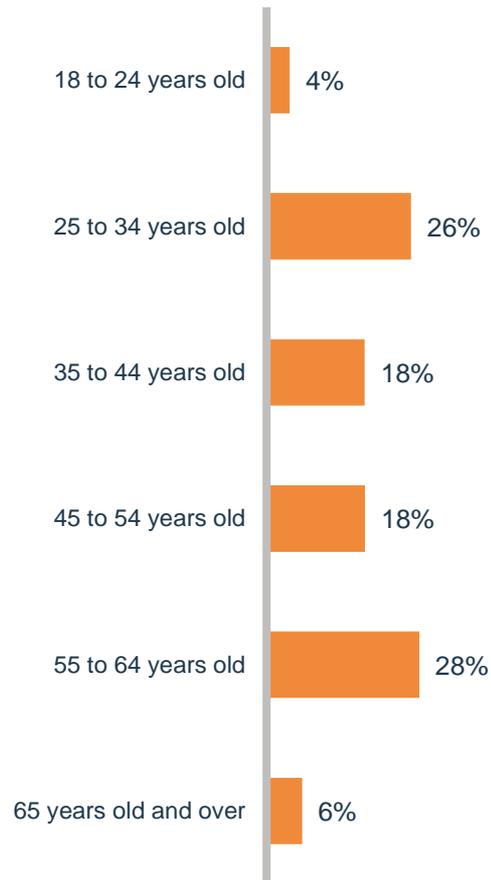
Sector of activity



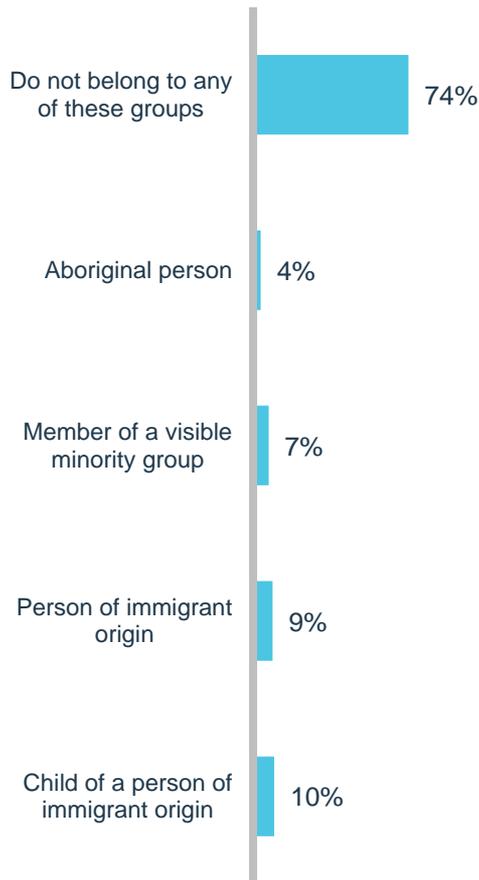
Age group, diversity groups and respondent gender



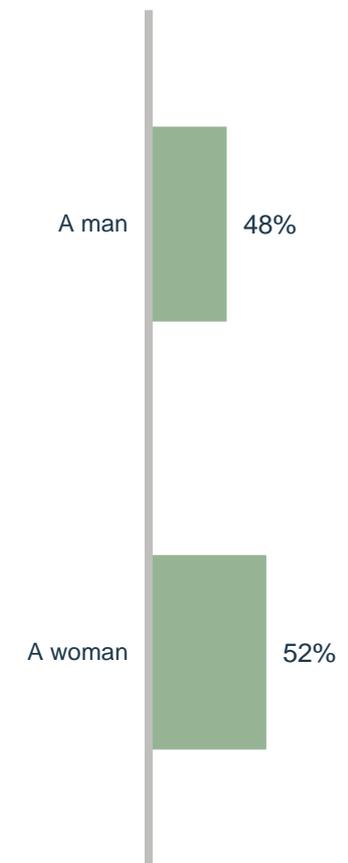
Age group



Diversity groups



Gender



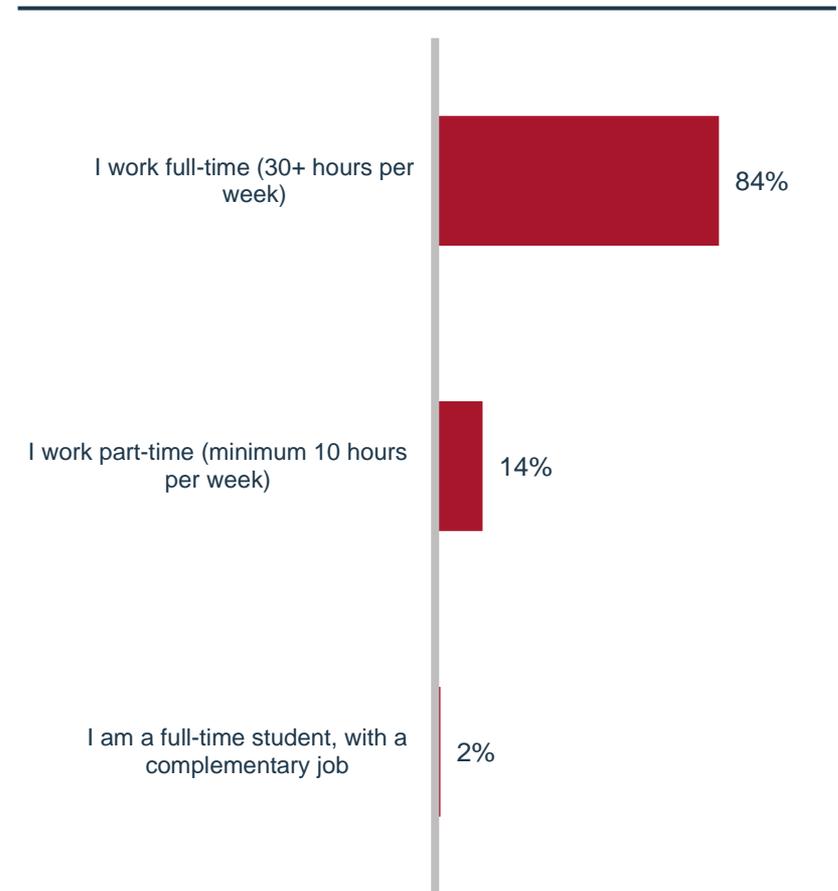
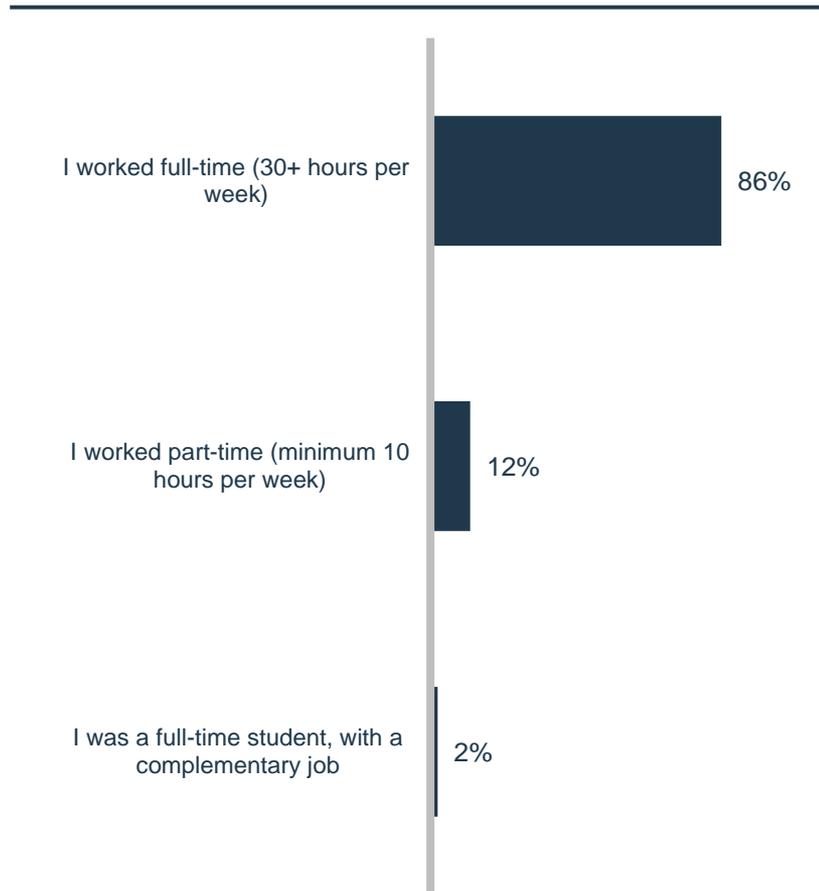
Pre-COVID and current employment situation



Pre-COVID situation



Current situation





Thank you.

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