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

BDC – Teleworking: changes in behaviours and habits
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.

Most organizations encouraged telework since the beginning of the pandemic.

Before the pandemic:
- 12%

Now (significantly higher):
- 58%

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

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.

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 of teleworking

<table>
<thead>
<tr>
<th>Impact</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increased efficiency</td>
<td>41%</td>
</tr>
<tr>
<td>Increased number of hours</td>
<td>41%</td>
</tr>
<tr>
<td>Improved quality of work</td>
<td>29%</td>
</tr>
<tr>
<td>Improved organization of workload</td>
<td>28%</td>
</tr>
<tr>
<td>Decreased absence rate</td>
<td>36%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Advantage</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reduced commuting time</td>
<td>84%</td>
</tr>
<tr>
<td>More flexible work schedule</td>
<td>62%</td>
</tr>
<tr>
<td>Better life balance</td>
<td>58%</td>
</tr>
</tbody>
</table>

### Disadvantages of teleworking

<table>
<thead>
<tr>
<th>Disadvantage</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Difficult to interact informally with co-workers</td>
<td>53%</td>
</tr>
<tr>
<td>Increased screen fatigue</td>
<td>45%</td>
</tr>
<tr>
<td>Difficult not to see colleagues at work</td>
<td>44%</td>
</tr>
</tbody>
</table>
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.

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.

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

Have noticed an positive impact on....

- Work schedule: 66%
- Work-related benefits: 78%
- Salary: 43%
- Performance bonus / Variable pay: 49%

33% Noted changes in the working conditions of teleworking employees at their workplace.

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

- **Mainly working remotely**
  - Significantly ↑ results among:
    - Respondents in the technology, information and cultural industries sector (78%)
    - Professional services (70%)
    - Members of a visible minority group (56%) and persons of immigrant origin (53%)
    - Respondents working for a company of 500+ employees (53%)
    - Those currently living in a large (55%) or medium (51%) urban area
    - Less than 45 years old (50%)
    - Quebec (48%) and Ontario (50%)
    - Women (48%)
    - Full-time employees (47%)

- **Mainly at the office**
  - 50%
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?

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>It is not possible in my role</td>
<td>79%</td>
</tr>
<tr>
<td>It is not an option offered at our company</td>
<td>18%</td>
</tr>
<tr>
<td>We don’t have the technological tools to do so</td>
<td>8%</td>
</tr>
<tr>
<td>I, personally, dislike working remotely</td>
<td>4%</td>
</tr>
<tr>
<td>Other</td>
<td>3%</td>
</tr>
</tbody>
</table>

More likely to say that teleworking is **not possible in their role**:

- **87%** Part-time employees
- **86%** Quebec respondents
- **91%** Those who work in women-owned companies

**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...?

<table>
<thead>
<tr>
<th></th>
<th>Total</th>
<th>“More”</th>
<th>“Less”</th>
</tr>
</thead>
<tbody>
<tr>
<td>A lot more</td>
<td>69%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Slightly more</td>
<td>11%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The same</td>
<td>15%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Slightly less</td>
<td>2%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>A lot less</td>
<td>3%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**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%)

**Base:** Those who currently work remotely (n=1,127).
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?

In an ideal world

- 9% Full time at the office
- 14% Most of the time at the office
- 28% Most of the time remotely
- 27% Full time remotely
- 22% 50-50 at the office/remote

Total “Mainly remotely”: 49%↑

Realistically

- 22% Full time at the office
- 27% Most of the time at the office
- 23% Most of the time remotely
- 18% 50-50 at the office/remote
- 11% Full time remotely

29%↓

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

- **Decreased a lot**: 4%
- **Slightly decreased**: 11%
- **No impact**: 45%
- **Slightly increased**: 28%
- **Increased a lot**: 13%

### Efficiency

- **Decreased a lot**: 5%
- **Slightly decreased**: 19%
- **No impact**: 35%
- **Slightly increased**: 25%
- **Increased a lot**: 16%

### Absence rate

- **Decreased a lot**: 24%
- **Slightly decreased**: 12%
- **No impact**: 57%
- **Slightly increased**: 5%
- **Increased a lot**: 2%

*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

- Deteriorated a lot: 2%
- Somewhat deteriorated: 13%
- No impact: 56%
- Somewhat improved: 20%
- Improved a lot: 10%

### Organization of the workload

- Deteriorated a lot: 5%
- Somewhat deteriorated: 21%
- No impact: 46%
- Somewhat improved: 21%
- Improved a lot: 7%

**Base:** Those who currently work remotely (n=1,095-1,102). Those who did not know were excluded from the calculation base.
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?

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work schedule</td>
<td>21%</td>
</tr>
<tr>
<td>Work-related benefits</td>
<td>11%</td>
</tr>
<tr>
<td>Salary</td>
<td>5%</td>
</tr>
<tr>
<td>Performance bonus / Variable pay</td>
<td>5%</td>
</tr>
<tr>
<td>Other</td>
<td>2%</td>
</tr>
<tr>
<td>No changes were made</td>
<td>68%</td>
</tr>
</tbody>
</table>

**At least one change**

Significantly ↑ results among:
- 18 to 24 years old (55%)
- Those working for a company mainly owned by women (53%)
- Members of a visible minority group (46%)
- Those currently living a large urban centre (37%)

**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**: 78%
- **Work schedule**: 66%
- **Performance bonus / Variable pay**: 49%
- **Salary**: 43%

**Base:** Those in companies that have changed the working conditions of teleworkers (n=49-169). Those who did not know were excluded from the calculation base.
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?

- **Reduce commuting time** 84%
- **Have a more flexible work schedule** 62%
- **Better life balance** 58%
- **Option to move to a more remote region without leaving my current job** 33%
- **Get better working conditions overall** 28%
- **Expand the geographic pool of companies where I can work** 21%
- **Work with employees with more diversified profiles** 9%
- **Reduce costs** 1%
- **Other** 1%
- **I don’t see any advantage** 5%

**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%.

**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%)
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?

<table>
<thead>
<tr>
<th>Disadvantage</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Difficult to interact informally with co-workers</td>
<td>53%</td>
</tr>
<tr>
<td>Increased screen fatigue</td>
<td>45%</td>
</tr>
<tr>
<td>Find it difficult not to see my co-workers at work</td>
<td>44%</td>
</tr>
<tr>
<td>Inability to disconnect</td>
<td>34%</td>
</tr>
<tr>
<td>Difficult to take breaks during the day</td>
<td>28%</td>
</tr>
<tr>
<td>Working more hours</td>
<td>26%</td>
</tr>
<tr>
<td>Find it difficult not to meet with my co-workers for after-hour activities</td>
<td>25%</td>
</tr>
<tr>
<td>Difficult to brainstorm / find innovative ideas</td>
<td>24%</td>
</tr>
<tr>
<td>Difficult to focus on my tasks</td>
<td>21%</td>
</tr>
<tr>
<td>Reduced performance</td>
<td>13%</td>
</tr>
<tr>
<td>Difficult to manage priorities</td>
<td>13%</td>
</tr>
<tr>
<td>Other</td>
<td>3%</td>
</tr>
<tr>
<td>I don’t see any disadvantage</td>
<td>10%</td>
</tr>
</tbody>
</table>

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%.

**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%)
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?

![Chart showing percentages of respondents: 54% Totally determining, 46% Not at all determining.]

**Base:** All qualified respondents (n=1,761). Those who did not know were excluded from the calculation base.
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?

- **Yes**: 12%
- **No, but I intend to do so in the next 12 months**: 16%
- **No, and I don’t intend to do so**: 72%

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

- **Very much so**: 21%
- **A little**: 27%
- **Not at all**: 52%

**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**

<table>
<thead>
<tr>
<th></th>
<th>Before moving</th>
<th>Now</th>
</tr>
</thead>
<tbody>
<tr>
<td>Large urban centre</td>
<td>44%</td>
<td>41%</td>
</tr>
<tr>
<td>Medium-sized urban area or suburbs</td>
<td>40%</td>
<td>36%</td>
</tr>
<tr>
<td>Small city</td>
<td>9%</td>
<td>14%</td>
</tr>
<tr>
<td>Rural area</td>
<td>7%</td>
<td>10%</td>
</tr>
</tbody>
</table>

**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**

<table>
<thead>
<tr>
<th>Now</th>
<th>After moving</th>
</tr>
</thead>
<tbody>
<tr>
<td>Large urban centre</td>
<td>↑ 49%</td>
</tr>
<tr>
<td>Medium-sized urban area or suburbs</td>
<td>33%</td>
</tr>
<tr>
<td>Small city</td>
<td>↓ 7%</td>
</tr>
<tr>
<td>Rural area</td>
<td>10%</td>
</tr>
<tr>
<td>Large urban centre</td>
<td>↓ 32%</td>
</tr>
<tr>
<td>Medium-sized urban area or suburbs</td>
<td>33%</td>
</tr>
<tr>
<td>Small city</td>
<td>18% ↑</td>
</tr>
<tr>
<td>Rural area</td>
<td>17%</td>
</tr>
</tbody>
</table>

**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.)?

<table>
<thead>
<tr>
<th>Comment</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not applicable / Not possible to work remotely</td>
<td>17%</td>
</tr>
<tr>
<td>Has an impact on the productivity/efficiency</td>
<td>15%</td>
</tr>
<tr>
<td>Diverse advices on teleworking</td>
<td>14%</td>
</tr>
<tr>
<td>Enjoys teleworking / Would like to continue at least part time</td>
<td>11%</td>
</tr>
<tr>
<td>Allows more time for themselves / Less commuting time</td>
<td>9%</td>
</tr>
<tr>
<td>Allows a better work/life balance and mental health</td>
<td>8%</td>
</tr>
<tr>
<td>Difficult work/life balance and mental health issues</td>
<td>8%</td>
</tr>
<tr>
<td>Has an impact on interactions and collaboration</td>
<td>8%</td>
</tr>
<tr>
<td>Issues with technology availability / Access to internet / Ergonomy</td>
<td>7%</td>
</tr>
<tr>
<td>Dislikes teleworking / Prefers working at the office</td>
<td>6%</td>
</tr>
</tbody>
</table>

*Base:* Those who provided an answer to the open-ended question (n=397). Verbatims were coded and categorized. This question was not mandatory. We only presented comments mentioned by 5%+ respondents.

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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

- B.C. and North: 14%
- Prairies: 19%
- Ontario: 36%
- Quebec: 24%
- Atlantic: 7%

Base: All respondents (n=1,912).
Number of employees, gender ownership and sector

**Number of employees**
- Less than 20 employees: 18%
- 20 to 99 employees: 18%
- 100 to 499 employees: 18%
- 500 to 1,999 employees: 13%
- 2,000 employees or more: 33%

**Gender ownership**
- Mainly by men: 28%
- By men and women in equal proportions: 18%
- Mainly by women: 7%
- Not applicable (public organization): 47%

**Sector of activity**
- Public services (education, health, social services, ...): 36%
- Professional services, finance and insurance: 12%
- Retail: 6%
- Other private services: 6%
- Manufacturing: 6%
- Technology, information and cultural industries: 5%
- Primary sectors: 4%
- Construction: 4%
- Transportation and warehousing: 3%

**Base:** All qualified respondents (n=1,691-1,900). Only sectors with 3%+ respondents are presented.
### Age group, diversity groups and respondent gender

<table>
<thead>
<tr>
<th>Age group</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>18 to 24 years old</td>
<td>4%</td>
</tr>
<tr>
<td>25 to 34 years old</td>
<td>26%</td>
</tr>
<tr>
<td>35 to 44 years old</td>
<td>18%</td>
</tr>
<tr>
<td>45 to 54 years old</td>
<td>18%</td>
</tr>
<tr>
<td>55 to 64 years old</td>
<td>28%</td>
</tr>
<tr>
<td>65 years old and over</td>
<td>6%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Diversity groups</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do not belong to any</td>
<td>74%</td>
</tr>
<tr>
<td>of these groups</td>
<td></td>
</tr>
<tr>
<td>Aboriginal person</td>
<td>4%</td>
</tr>
<tr>
<td>Member of a visible</td>
<td>7%</td>
</tr>
<tr>
<td>minority group</td>
<td></td>
</tr>
<tr>
<td>Person of immigrant</td>
<td>9%</td>
</tr>
<tr>
<td>origin</td>
<td></td>
</tr>
<tr>
<td>Child of a person of</td>
<td>10%</td>
</tr>
<tr>
<td>immigrant origin</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Gender</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>A man</td>
<td>48%</td>
</tr>
<tr>
<td>A woman</td>
<td>52%</td>
</tr>
</tbody>
</table>

**Base:** All qualified respondents (n=1,840-1,914).
Pre-COVID and current employment situation

**Pre-COVID situation**
- I worked full-time (30+ hours per week): 86%
- I worked part-time (minimum 10 hours per week): 12%
- I was a full-time student, with a complementary job: 2%

**Current situation**
- I work full-time (30+ hours per week): 84%
- I work part-time (minimum 10 hours per week): 14%
- I am a full-time student, with a complementary job: 2%

*Base: All qualified respondents (n=1,914).*
Thank you.
Research and Market Intelligence
marketingresearch@bdc.ca