

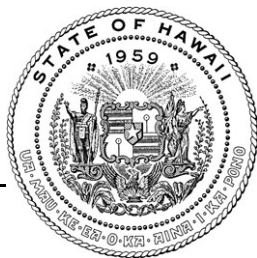
Remote Work in Hawai'i

Effects of the COVID-19 Pandemic on Hawai'i's Remote Work Marketplace

Prepared for:
State of Hawai'i
Department of Business,
Economic Development & Tourism



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DEPARTMENT OF BUSINESS, ECONOMIC DEVELOPMENT & TOURISM

DAVID Y. IGE
GOVERNOR

MIKE MCCARTNEY
DIRECTOR

CHUNG I. CHANG
DEPUTY DIRECTOR

No. 1 Capitol District Building, 250 South Hotel Street, 5th Floor, Honolulu, Hawaii 96813
Mailing Address: P.O. Box 2359, Honolulu, Hawaii 96804
Web site: dbedt.hawaii.gov

Telephone: (808) 586-2355
Fax: (808) 586-2377

Aloha,

The sudden and severe impact of the COVID-19 pandemic forced many of Hawai'i's employers and employees to quickly change their work environment for the sake of public health and the safety of their families. Over the months that followed, much of Hawai'i's workforce underwent a dramatic shift to a remote work posture in many industries, though this change was not equitable. Many businesses and employees whose work could not be performed remotely were victims of the pandemic—businesses had to shutter their doors, and countless Hawai'i residents experienced layoffs or job losses. Businesses needed to find other ways to carry on in the face of uncertainty, while maintaining a safe working environment for their employees.

The State of Hawai'i's Department of Business, Economic Development, and Tourism (DBEDT) enlisted Anthology Research to study the effects of the COVID-19 pandemic on Hawai'i's remote work marketplace so that we could begin to understand and address the changing economic landscape for both Hawai'i's employers and employees. The enclosed report is the culmination of seven months of work which provides valuable insights on our state's readiness and opportunities to participate in the global Digital Economy. The results will help to inform state programs and policies pertaining to the remote work marketplace and those industries conducive to growth in the Digital Economy.

DBEDT is committed to continue serving the people of Hawai'i by conducting research that enables data-driven decisions to align our economy with the emerging knowledge-based, zero emission, and global Digital Economy. In doing so, DBEDT hopes to serve as a facilitative catalyst for the state and county governments, policymakers, businesses, investors, labor organizations, and communities, so that we may collectively work to put Hawai'i on the path toward sustainable economic prosperity.

This study required input from Hawai'i's residents and businesses across all industries, and we thank all respondents for sharing their valuable time and voice to ensure a robust representative sample for this important topic.

With aloha,

(808) 586-2355

Mike McCartney



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EXECUTIVE SUMMARY

The State of Hawai'i's Department of Business, Economic Development, and Tourism (DBEDT) set out to conduct a study to examine the characteristics of Hawai'i's remote work marketplace in order to better understand and address Hawai'i's changing economic landscape for both employers and employees. DBEDT's Research and Economic Analysis Division issued a Request for Proposal (RFP-21-05-READ) in May 2021 and Anthology Research was selected to conduct work on the study, which comprised of two surveys: a survey of Hawai'i's **employers**, and a survey of Hawai'i's **employees**. Outreach was done statewide through email, postal mail, and telephone. The key findings from these surveys are summarized below.

Survey of Employers in the State of Hawai'i

- A total of 29,627 contacts were made with Hawai'i firms, of which 1,661 unique firms completed the survey for a response rate of 5.61%. 861 surveys were completed from firms in Honolulu County, 316 from Hawai'i County, 314 from Maui County, and 170 from Kaua'i County.
- **Incidence of Remote Work** – Overall, 38.7% of the firms polled offered their employees the option to work remotely during the pandemic. The majority (56.7%) of firms in Hawai'i did not offer remote work because the work cannot be done remotely. Few firms (3.9%) made the conscious decision to not allow their employees to work remotely if it was indeed a possible option.
 - 15.3% of the firms polled already had a remote work program in place when the pandemic started. Working remotely was something necessitated due to the pandemic for roughly one in four (23.4%) firms.
- **Industries that Offered Remote Work** – Statewide, more than 50% of businesses in the following industries offered remote work as an option during the pandemic.
 - Professional, Scientific, and Technical Services (75.7%)
 - Finance and Insurance (75.5%)
 - Information (62.8%)
 - Real estate, rental leasing (59.9%)
 - Educational Services (58.8%)
 - Management of Companies and Enterprises (54.9%)
 - Accommodation (incl. visitor industry) (54.4%)
- **Remote Workforce 18 months into the Pandemic** – As of August 31, 2021, a third (32.2%) of the firms polled indicated they had employees that were working remotely. As noted in the prior section, 38.7% had offered remote work as an option for employees over the course of the pandemic so this number is slightly lower at the time of the survey, suggesting a reduction of firms that continued to offer remote work after doing so during the early part of the pandemic.



- Amongst the firms that had employees working remotely as of August 31, 2021, respondents estimated that 50.52%, or half of their staff, was working in a location outside of the office at least part of the time.
- As of August 31, 2021, an estimated 198,224 private sector payroll employees were working remotely for Hawai'i companies, a vast majority (91.10%) of them are working in Hawai'i.
- **Company Investments to Enable Remote Work** – Among the firms that offered remote work as an option for their employees, half (51.2%) made financial investments to enable it. Of these firms, over half: purchased hardware for employees' use out of the office (89.3%), implemented new communication/collaboration software (82.2%), increased network security measures (60.9%), and digitized operations that were previously paper-based (52.3%).
- **Company Evaluation of Remote Work Experience** – Among firms that offered remote work to their employees, nearly half (49.8%) indicated their company's remote work experience was the same compared to working from an office, while 30.5% indicated a somewhat or much better experience, and 19.7% indicated a somewhat or much worse experience.
 - **Perceived Benefits** – Two-thirds (66.0%) of firms with remote workers felt that, by continuing to offer remote work, they were experiencing, or hoped to experience, an increase in employee satisfaction, while nearly half perceived productivity increases (45.6%) or reduced operational costs (44.5%). Roughly a third (36.3%) believe it acts as an incentive to recruit and retain employees, while 21.5% felt they would have greater access an off-island talent pool.
 - **Concerns** – The most prominent concerns impacting employers' decision to offer/continue offering remote work include: difficulty in collaboration and teamwork (63.1% big/some concern), difficulty in monitoring and supervising work (59.5% big/some concern), maintaining security and compliance for remote workers (55.9% big/some concern), technical challenges due to unreliable internet connectivity (55.0% big/some concern), and difficulty in maintaining company culture (53.5% big/some concern).
- **Future Plans for Work Remote** – Half (51.0%) of the firms that offered remote work as an option to their employees at any time between March 2020 and August 31, 2021 expect to offer remote work as an option in the future in some form or another. 14.7% indicated that, while all of their employees have or will return to the office, their company intends to offer remote work options in the future. 22.9% say their firm has yet to decide on a plan of action, while just 11.3% have ruled out remote work for all of their employees once the pandemic has subsided.
 - One in four (24.2%) of these firms anticipate that their company will reduce office space as it adapts to a future remote work environment.



- **Enabling Remote Work** – Overall, 43.2% of firms polled believe that improving broadband infrastructure is a good step in better facilitating remote work in the islands. A near equal number (41.0%) feels that better guidelines would help businesses in promoting this type of work environment. Roughly one in five (19.9%) believe that increasing remote work hubs and/or co-working locations could further enable remote work.

Survey of Employees in the State of Hawai'i

- A total of 176,610 contacts were made with Hawai'i residents, of which 5,451 qualified and completed the survey for a response rate of 3.09%. 2,809 surveys were completed from individuals in Honolulu County, 1,244 from Hawai'i County, 936 from Maui County, and 462 from Kaua'i County.
- **Incidence of Remote Work** – Overall, 59.6% of those polled have worked remotely at some point in time between the start of the pandemic in March 2020 and the time of the survey.
 - A majority (83.7%) of those who worked remotely did so as a direct result of their employer's response to the pandemic.
 - Of those who worked remotely, roughly one in four (23.6%) respondents was working exclusively on a remote basis at the time they completed the survey. A near equal number (23.4%) were operating in a hybrid fashion, going into the office and/or on-site only part of the time. The remaining 53.0% were working exclusively at the office and/or on-site.
 - Roughly a third (36.9%) of those who were working remotely on an exclusive basis at the time of the survey actually returned to the office/on-site at some point during the pandemic.
- **Shift in Remote Work Status Since the Start of the Pandemic** – Overall, the percentage of workers in a full-time or hybrid remote work environment at the time of the survey was down 11.7%, to 47.9%, since the start of the pandemic in March 2020.
- **Employee Satisfaction with Remote Work** – Overall, those who have worked remotely during the pandemic appear extremely satisfied with the experience, with 90.9% giving a satisfied rating (55.6% very satisfied + 35.3% somewhat satisfied), and just 9.0% providing a dissatisfied rating (6.6% somewhat dissatisfied + 2.4% very dissatisfied).
- **General Perceptions of Remote Work** – Of those who have worked remotely, most agree that the type of work that they perform can be done on a remote basis (52.0% strongly agree) and that they prefer to work remotely in general (44.0% strongly agree). Fewer agreed with the notion of changing jobs (29.5% strongly agree) or working for less pay (14.4% strongly agree) to be able to work remotely.



- **Factors Impacting Ability to Work Remotely** – For those who have worked remotely, there is a high level of comfort with the technology needed to function in this environment (57.3% strongly agree). Respondents also felt positively about the availability of a dedicated workspace at home (48.3% strongly agree) and having an employer who provides them with the necessary tools to succeed in a remote work environment (41.3% strongly agree).

Respondents generally did not agree with potential obstacles impacting their ability to work remotely, such as the inability to collaborate as freely with co-workers and clients (56.5% somewhat/strongly disagree), having too many distractions (63.2% somewhat/strongly disagree), and having an unstable internet connection (72.3% somewhat/strongly disagree).

- **Perceived Benefits and Disadvantages of Remote Work** – Over 50% of those who worked remotely strongly agreed with three perceived benefits of remote work: not having to commute (61.2% strongly agree), work schedule flexibility (52.5% strongly agree), and freedom to live anywhere (50.8% strongly agree). On the other hand, respondents agreed to some extent with perceived disadvantages to remote work, such as missing out on social and networking aspects of in-office work (63.9% somewhat/strongly agree) and being at a disadvantage for promotions or advancement (44.7% somewhat/strongly agree).
- **Enabling Remote Work** – Two-thirds (65.3%) of remote workers suggest improving the broadband infrastructure as a means of further supporting this form of work in the state. Nearly half (47.9%) agree that educating all those involved about best practices on remote work would help facilitate it, while 46.9% feel that increased remote work hubs and co-working locations are a step in the right direction.
- **Future Plans for Remote Work** – Overall, 43.5% expect their employer to offer some form of remote work to staff even after the end of the pandemic.
 - 17.9% predict their employer will allow them to work remotely on a full-time basis, while another one in four (25.6%) anticipates their employer will implement a hybrid system once the pandemic subsides.



INTRODUCTION

Rise of the Digital Economy

The *Digital Economy*—defined by Deloitte as the “economic activity that results from billions of everyday online connections among people, businesses, devices, data, and processes” (Deloitte, 2021)—permeates all aspects of society, including the way people interact and learn, the delivery and receipt of healthcare and other goods and services, and the way businesses conduct global commerce. The backbone of the Digital Economy is the internet, an “information highway” that facilitates hyperconnectivity between people, organizations, and data. The Digital Economy is bringing about economic transformation unlike any other before it, where innovation and breakthroughs are occurring at an exponential rate, leading to unfathomable possibilities to fuel job opportunities and economic growth and improve society’s well-being.

Industries at the core of the U.S. economy are being disrupted by digital newcomers that are leaner and more agile. U.S. businesses must transform as a matter of survival and are digitizing their processes and upgrading their digital systems at breakneck speed, just to stay competitive and relevant in the global economy. It comes as no surprise that growth of the Digital Economy outpaces overall U.S. economic growth. In 2019, the Digital Economy comprised 9.6% of U.S. Gross Domestic Product (GDP) and saw an average annual growth of 6.5% from 2005 to 2019—1.8% faster than the U.S.’ overall growth during this period (U.S. Bureau of Economic Analysis).

The COVID-19 Pandemic Fans the Digital Flame

The onset and continuation of the COVID-19 pandemic have only accelerated the global race toward the Digital Economy by fostering the simultaneous adoption of digital technologies by businesses, employees, and consumers alike. Both the growing ubiquity of the internet and internet-connected devices, and the government’s guidelines on social distancing to combat the spread of the COVID-19 virus, have led consumers to increasingly expect the convenience and safety of digital delivery of products and services. Meanwhile, efforts to curtail COVID-19 in the workplace and ensure a safe working environment for employees forced businesses to digitize processes, adopt new technologies, and accommodate flexible work options including remote work—defined as work occurring outside of the office space, such as work-from home, coffee shops, and co-work hubs—while employees needed to adapt to new working conditions in a digital environment.

As the ongoing pandemic has waxed and waned through new COVID-19 variants and the uptake of the vaccine, attempts to call employees back to the office are being swiftly met with resistance. Labor market experts describe this trend as the “Great Resignation” or perhaps more appropriately, the “Great Reshuffle,” as employees are forcing businesses to the negotiating table to reconsider the future of the



workplace and, in essence, the future of work—once again, a phenomena predating, but accelerated by, the COVID-19 pandemic.

Decoupling Work from Jobs Means Greater Reliance on “Gig” and Remote Workers

For many years, jobs have been one of the common units of measure for evaluating economic activity. Jobs are a traditional structured approach to organizing human capital in the production of work. However, the increase in “gig” work (one-off, task-based work, typically organized through digital platforms), the need for the Pandemic Unemployment Assistance Program, and the increase in remote work brought on by the COVID-19 pandemic validates that productivity—the means through which businesses generate value—is a function of work and not a function of a job.

As Ravi Kumar, President of Infosys, explained to New York Times columnist Thomas L. Friedman, the result of the acceleration of digitization across business processes is work that is more modular and “...broken up into small packets that are farmed out by companies. Companies ... will increasingly become platforms that synthesize and orchestrate these modular packets to make products and services....[W]ork will increasingly get disconnected from companies, and jobs and work will increasingly get disconnected from each other.” Friedman adds, “Some work will be done by machines; some will require your physical proximity in an office or a factory; some will be done remotely; and some will be just a piece of a task that can also be farmed out to anyone, anywhere.” (Friedman, 2020)

While trends in technology innovation and affordability, and consumer appetite for cloud-based services, have been drivers of digitization and the rise of “gig” work, the COVID-19 pandemic has accelerated this decoupling of work from jobs. Businesses have invested heavily in technologies that allowed for the rapid deployment of distributed work/work-from-home solutions and are now eager to reap the rewards of these investments. The digital infrastructure enabled by their investments will allow businesses to look beyond their walls and the construct of traditional jobs in order to optimize their productivity. As a result, business demand for remote and “gig” workers will be on the rise.

In the rapidly evolving and uncertain economic environment, one thing is for sure: the Digital Economy *is* the economy, and policy and strategy must account for this new reality.

Implications for Hawai‘i’s Future

The Digital Economy levels the playing field for Hawai‘i—one of the world’s most geographically isolated places—to participate in the global marketplace like never before. Local businesses can tap into the unlimited potential of the global talent pool through digital hiring platforms and virtual meeting, management, and collaboration tools, while Hawai‘i’s workforce can compete nationally if not globally for remote work opportunities that can contribute to higher wages and a higher quality of life. Business models can efficiently scale beyond the State’s borders by exporting products and services through web-based interfaces. Business processes can be digitized and leverage Artificial Intelligence and automation,



allowing businesses to operate more efficiently and strategically. Remote workers from beyond Hawai'i's shores can now call Hawai'i home and contribute to the State's economy, including kama'aina reuniting with their families, and effectively reverse the brain drain.

This pivot to the Digital Economy comes at a time when Hawai'i looks to diversify and evolve its economy away from natural resource-intensive activities, and cultivate regenerative and sustainable levels and forms of economic development that address disparities and advance equitable outcomes. The Hawai'i 2050 Sustainability Plan calls for a focus on promoting sustainable economic strategies, and describes economic diversification through the development of digital infrastructure and broadband-enabled industries, as one such strategy. This Plan further recommends strengthening broadband infrastructure and digital literacy in underserved communities to facilitate equitable access to online learning, services, and livelihoods, in alignment with the Digital Equity Declaration developed by some 250 public and private stakeholders known as the Broadband Hui. These strategies are further elaborated in the Hawai'i Broadband Strategic Plan, and both small- and large-scale implementation projects are actively being coordinated between government, private sector, nonprofit, and community-based initiatives.

All this to say, Hawai'i is both primed and positioned to not only participate in, but leverage this global transformation that can shape the State's economic future and contribute to the well-being of Hawai'i's people, environment, and culture for generations to come. To this end, the State of Hawai'i's Department of Business, Economic Development and Tourism (DBEDT) set out to conduct a study to examine the characteristics of Hawai'i's remote work marketplace in order to better understand and address Hawai'i's changing economic landscape for both employers and employees. ***While remote work is not, in and of itself, an industry that can be developed to advance the economic prosperity of the State and its people, studying it can aid in developing an understanding of the naturally occurring opportunities for growth in the Digital Economy, gaps, as well as impacts on other parts of Hawai'i's economic system, to inform a holistic economic development strategy moving forward.***

Examining Remote Work in Hawai'i

The purpose of the Remote Work in Hawai'i study is to examine the characteristics of Hawai'i's remote work marketplace in order to better understand and address Hawai'i's changing economic landscape for both employers and employees. The objectives of the study were the following:

- To obtain data to understand the practice of remote work starting at the beginning of the COVID-19 pandemic, and future remote work/return to office plans;
- To document the characteristics of the remote work population by demographics, industry, occupation, and income levels; and
- To analyze the impact of remote work on workforce development, environment, traffic, residential housing demand, office space demand, energy demand, leisure time, overall quality of life, work/life balance, and productivity.



DBEDT's Research and Economic Analysis Division issued a Request for Proposal (RFP-21-05-READ) in May 2021 and Anthology Research was selected to conduct work on the study, which comprised of two surveys: a survey of Hawai'i employers, and a survey of Hawai'i employees. The methodology and findings from these surveys are detailed in this report. The results of this study will help shape State programs and policies pertaining to the remote work marketplace and those industries conducive to growth in the Digital Economy, by understanding current remote work practices and future plans, capacity, benefits and challenges, and interest levels from the perspectives of both Hawai'i's employers and employees.

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METHODOLOGY

The State of Hawai'i's Department of Business, Economic Development, and Tourism (DBEDT) contracted Anthology Research to conduct this study concerning the COVID-19 pandemic's effect on Hawai'i's workforce, which comprised large-scale statewide surveys of employers and employees. The findings from each of the two surveys are included in this report.

In order to gather a representative sample of Hawai'i's population, Anthology Research utilized a mixed-mode methodology for data collection that included online, telephone (landline and mobile, listed and unlisted numbers), and mail outreach.

Survey Instruments

The instrument for each survey was developed by DBEDT's Research and Economic Analysis Division (READ), with input and suggestions from Anthology Research. A copy of the employer and employee questionnaires used in this study is located in the appendix of this report.

Prior to fully launching the surveys, a pre-test was conducted with randomly selected employers and employees to ensure questions were relevant and understandable to respondents. Feedback gathered from the pre-test was used to make minor changes to the questionnaires before they were finalized.

Sampling

Quotas by county were set by DBEDT for each survey. Sampling units were selected using a stratified randomized sampling approach according to the sampling rate specified by the estimates of population for each county.

- **Employer Survey:** The sampling frame for Hawai'i employer businesses included firms with at least one (1) payroll employee who were in operation in the state at the time the data were collected.
- **Employee Survey:** The sampling frame for the employee survey included Hawai'i residents ages 18 years and older and those employed or currently looking for work. The survey screened out respondents that were not residents of the state, active-duty military, and those unemployed/not looking for work and retired.

Sample Sources

Multiple sample sources were used in order to achieve a representative sample of employers and employees across the state. When possible, invitations were extended to a randomly selected contact through all available forms of contact information. Multiple attempts were made through all modes for each record selected for the sampling frame.

- **Telephone:** Random Digit Dialing software was utilized to generate a random sampling of telephone numbers. This list was augmented by publicly-available consumer and business lists (including Dunn & Bradstreet).



- **Online:** The online sample was drawn from companies who specialize in compiling lists of Hawai'i residents from membership and mailing lists purchased from retail companies. This available sample was augmented with a random selection of members from Anthology's proprietary panel of Hawai'i residents and businesses, as well as email addresses from publicly available consumer and business databases.
- **Mail:** The mail sample utilized an Address-Based Sampling (ABS) Frame derived from the U.S. Postal Service's (USPS) Computerized Delivery Sequence File (CDSF), as well as a Dunn & Bradstreet Business list.

Data Collection

The finalized questionnaires were programmed into Anthology Research's Sawtooth CATI system for telephone surveys, which were conducted from its downtown Honolulu call center using live, local interviewers. The online survey was programmed into Qualtrics, which allowed for respondents to complete the survey on their computer, tablet, or smart phone. The mailed invitations were sent through USPS and each included a unique eight-digit code that could be used to request a hard copy of the survey, or enable the survey to be done via phone or online. A landing page was created at www.hawaiiremoteworksurvey.com where respondents could go to receive more information about the survey.

- **Employer Survey:** Data were collected between September 16, 2021 – January 3, 2022, during which time a total of 1,661 surveys were collected. The corresponding margin of error for the overall sample of employers is +/- 2.40% at the 95% level of confidence.
- **Employee Survey:** Data were collected between September 16, 2021 – January 10, 2022, during which time a total of 5,451 surveys were collected. The corresponding margin of error for the overall sample of employees is +/- 1.33% at the 95% level of confidence.

The number of surveys collected among employers and employees are shown below by county, along with the corresponding margins of error for each county and the statewide total. Note: Margins of error are presented at the 95% level of confidence.

Hawai'i Employer Survey		
County	Sample Size	Margin of Error
Honolulu County	n=861	+/- 3.34%
Hawai'i County	n=316	+/- 5.51%
Maui County	n=314	+/- 5.53%
Kaua'i County	n=170	+/- 7.52%
Statewide	n=1,661	+/- 2.40%

Hawai'i Employee Survey		
County	Sample Size	Margin of Error
Honolulu County	n=2,809	+/- 1.85%
Hawai'i County	n=1,244	+/- 2.78%
Maui County	n=936	+/- 3.20%
Kaua'i County	n=462	+/- 4.56%
Statewide	n=5,451	+/- 1.33%



In order to encourage participation in the survey, an incentive was offered in the form of a raffle to win one of 15 \$250 gift cards. Ten winners were selected among respondents to the employee survey and five winners selected from the employer survey respondents.

Data Processing

Anthology's trained and experienced staff cleaned the data, including categorizing of unaided (open-ended) responses. A single database of responses was created from Qualtrics Online and Sawtooth CATI telephone sources.

Weighting

Since quota-based sampling by county was used, the data were weighted as follows to ensure the statewide totals are presented in the proper proportions. Note: Throughout the report, bases are shown to indicate the number of respondents who answered each question, however these bases are unweighted.

Total statewide data collected from both employers and employees in the state of Hawai'i were weighted by industry and by county according to the 2021 North American Industry Classification System (NAICS) codes, the standard used by Federal statistical agencies to classify business establishments. Due to small cell sizes in select industries sampled, certain NAICS codes were combined for reporting purposes.

- **Employer Survey:** Weights were derived from the U.S. Census Bureau's 2019 County Business Patterns.
- **Employee Survey:** Weights were derived from the U.S. Census Bureau's 2019 1-year American Community Survey, Public Use Microdata Sample (PUMS) data of adults 18+.

Analysis

The data were analyzed using SPSS version 27. Frequency programs, which show the number and percentage of respondents who select each answer, were produced and used as the basis for this report.

Notes on Timeframes Used in the Report

In order to better understand changes in the remote workforce over time, as well as provide a common reference point for employers to estimate the number of employees in their firm, various timeframes were used in the survey.

- The employer survey uses two questions with the date of August 31, 2021, which represented the last full month prior to the start of fielding. This allowed the collection of comparable employer estimates of their firm's total number of employees and number of employees working remotely, as of the specified date.
- The employee survey references remote work "at any point since pandemic onset" and "at the time of the survey" which are defined as follows.



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- **“Remote Worker at Any Point Since Pandemic Onset”**: While it is understood that the pandemic remains ongoing at the time of this report, this term is used to refer to those part- and full-time employees who worked remotely, either on a full-time or hybrid basis, at any point in time between March 2020 and the time of the survey, which was fielded September 16, 2021 through January 10, 2022.
 - **“Remote Worker at the Time of the Survey”**: Those part- and full-time employees who were working remotely, either on a full-time or hybrid basis, at the time they completed the survey, between September 16, 2021 through January 10, 2022.

Acknowledgements

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EMPLOYER SURVEY

The sampling frame for Hawai'i employer businesses included firms with at least one (1) payroll employee who were in operation in the state at the time the data were collected. A total of 29,627 contacts were made with Hawai'i firms, of which 1,661 unique firms completed the survey for a response rate of 5.61%. 861 surveys were completed from firms in Honolulu County, 316 from Hawai'i County, 314 from Maui County, and 170 from Kaua'i County.

1. REMOTE WORK POLICY

Respondent firms were asked which of the options listed in Table 1.1 best described their company's policy regarding remote work.

Table 1.1. Remote Work Policy by County

Remote Work Policy	STATEWIDE	Honolulu County	Hawai'i County	Maui County	Kaua'i County
<i>Long-term policy that started before the outbreak of COVID-19 (e.g., prior to March 2020)</i>	15.3%	16.7%	13.2%	12.1%	12.2%
<i>First time due to the COVID-19 pandemic (e.g., beginning in March 2020)</i>	23.4%	27.5%	15.6%	16.9%	13.3%
OFFERED REMOTE WORK	38.7%	44.2%	28.8%	29.0%	25.5%
<i>Did not offer remote work but the work could be done remotely</i>	3.9%	3.5%	4.1%	4.4%	5.6%
<i>Did not offer remote work because the work cannot be done remotely.</i>	56.7%	51.6%	66.4%	66.1%	67.2%
DID NOT OFFER	60.6%	55.1%	70.5%	70.5%	72.8%
<i>Don't know/Refused</i>	0.8%	0.7%	0.7%	0.5%	1.7%

Q5. Has your company offered remote work as an option for some or all of your employees?

Overall, 38.7% of the firms polled offered their employees the option to work remotely during the pandemic. 15.3% of the firms polled already had a remote work program in place when the pandemic started. For roughly one in four (23.4%) firms, working remotely was something pandemic necessitated.

Few firms (3.9%) made the conscious decision to not permit remote work despite it being possible to do the work remotely.

When segmented by county, we find firms in Honolulu County significantly more likely to offer remote work options than were their Neighbor Island counterparts (44.2% and 28.2% offered remote work, respectively). Conversely, a higher proportion of Neighbor Island firms did not offer remote work as an option for the simple fact that the work could not be done in this manner (66.4% compared with 51.6% of firms in Honolulu County).



The table below provides the proportion of each industry that offered remote work as an option at some point between March 2020 and the time the survey was taken, regardless if it was no longer an option. The shaded areas in yellow represent the industries in which remote work was offered by over 50% of firms surveyed statewide. Please note the relatively small bases when examining some of these results. The calculation of the bases or counts for this section excludes those who refused or chose not to respond to this question.

Table 1.2. Industry Incidence of Remote Work

Industry	STATEWIDE		Honolulu County		Hawai'i County		Maui County		Kaua'i County	
	Base	%	Base	%	Base	%	Base	%	Base	%
<i>Agriculture, Forestry, Fishing, and Hunting</i>	42	48.6%	8	75.0%	18	22.2%	12	16.7%	4	25.0%
<i>Mining</i>	1	0.0%	-	-	1	0.0%	-	-	-	-
<i>Utilities</i>	16	21.8%	11	27.3%	2	50.0%	1	0.0%	2	0.0%
<i>Construction</i>	182	26.7%	99	33.3%	29	6.9%	38	26.3%	16	12.5%
<i>Manufacturing</i>	49	42.7%	26	46.2%	9	11.1%	9	55.6%	5	40.0%
<i>Wholesale Trade</i>	40	24.1%	22	22.7%	10	20.0%	4	50.0%	4	0.0%
<i>Retail Trade</i>	178	20.6%	86	27.9%	36	13.9%	38	10.5%	18	0.0%
<i>Transportation and Warehousing</i>	42	31.5%	23	21.7%	9	33.3%	7	42.9%	3	66.7%
<i>Information</i>	20	62.8%	10	60.0%	2	50.0%	4	75.0%	4	100.0%
<i>Finance and Insurance</i>	63	75.5%	34	79.4%	13	69.2%	8	62.5%	8	62.5%
<i>Real Estate, Rental Leasing</i>	89	59.9%	34	64.7%	19	73.7%	29	37.9%	7	42.9%
<i>Professional, Scientific, and Technical Services</i>	171	75.7%	102	83.3%	25	56.0%	29	51.7%	15	66.7%
<i>Management of Companies and Enterprises</i>	11	54.9%	7	57.1%	3	66.7%	1	0.0%	-	-
<i>Administrative and Support</i>	59	32.5%	31	32.3%	10	30.0%	13	30.8%	5	40.0%
<i>Educational Services</i>	48	58.8%	36	69.4%	6	66.7%	3	0.0%	3	66.7%
<i>Health Care and Social Assistance</i>	207	37.5%	125	39.2%	38	26.3%	23	39.1%	21	38.1%
<i>Art, Entertainment, and Recreation</i>	87	40.8%	31	54.8%	20	25.0%	20	25.0%	16	37.5%
<i>Accommodation</i>	50	54.4%	16	75.0%	9	33.3%	17	17.6%	8	37.5%
<i>Food Services</i>	138	4.1%	62	4.8%	31	3.2%	31	3.2%	14	0.0%
<i>Other Services</i>	149	39.7%	90	50.0%	22	18.2%	23	21.7%	14	0.0%
<i>Waste Management and Remediation Services</i>	5	37.9%	3	33.3%	1	100.0%	1	0.0%	-	-
TOTAL	1,647		856		313		311		167	

Q5. Has your company offered remote work as an option for some or all of your employees?

- Note:
- a. Industry listed by 2-digit NAICS order
 - b. Remote work opportunity = Q51=Yes or Q52=Yes or Both =Yes
 - c. % is by industry within each county. %s don't add up to 100% horizontally or vertically
 - d. Dashes (-) indicate no data were available
 - e. Shaded cells in yellow represent the industries in which remote work was offered by over 50% of firms surveyed statewide

The top five industries with the highest incidence of remote work statewide were (in descending order): Professional, Scientific, and Technical Services (75.7%); Finance and Insurance (75.5%); Information (62.8%); Real Estate, Rental Leasing (59.9%); and Educational Services (58.8%).



In this next section of the study, we examine the proportion of firms that have offered remote work as an option during the ongoing pandemic, broken down by the size of the firm based on number of employees.

Table 1.3. Incidence of Remote Work by Firm Size

State/County	1-49 EMPLOYEES		50-99 EMPLOYEES		100+ EMPLOYEES	
	Base	%	Base	%	Base	%
STATEWIDE	1,459	35.7%	99	47.6%	100	71.0%
Honolulu County	735	40.2%	56	56.7%	67	78.8%
Hawai'i County	297	28.4%	10	23.5%	9	50.1%
Mau'i County	280	28.1%	19	39.9%	15	30.7%
Kaua'i County	147	25.5%	14	7.4%	9	60.2%

Q5. Has your company offered remote work as an option for some or all of your employees?

- Note:
- a. Number of employees = Full Time + Part Time
 - b. % is within each firm size category, %s don't add up to 100%
 - c. Shaded cells in yellow represent statistically significant findings relative to those shaded in gray

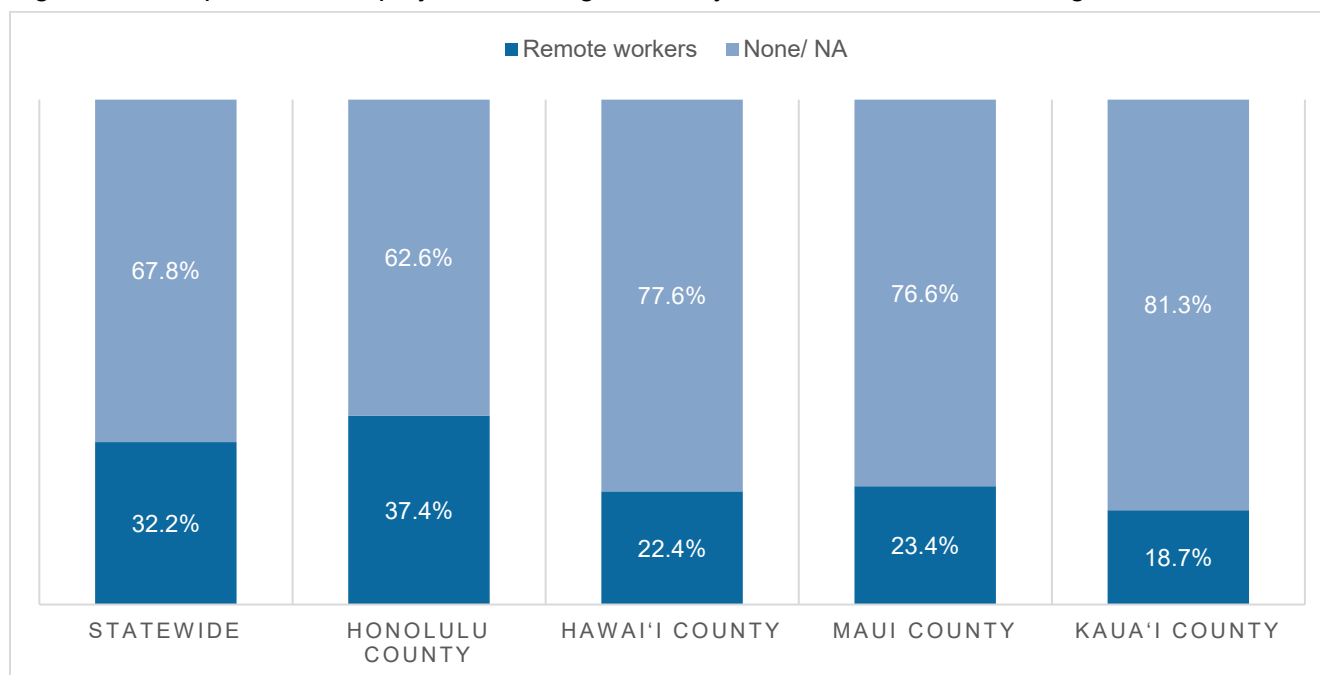
The cells shaded in gray and yellow highlight statistically significant findings: firms having 50 to 99 employees in Honolulu County had a statistically higher incidence of remote work than Honolulu firms having less than 50 employees, and firms having 100 or more employees in Honolulu County and Statewide had a statistically higher incidence of remote work than firms having less than 100 employees in those regions.



REMOTE WORKFORCE AS OF AUGUST 31, 2021

In this next section of the study, we determine the number of respondent firms that had remote workers as of August 31, 2021, which represented the last full month prior to the start of fielding.

Figure 1.1. Proportion of Employees Working Remotely for Hawai'i Firms as of August 31, 2021



Q6. How many of your employees worked remotely as of August 31, 2021?

A third (32.2%) of the firms polled indicated they had employees that were working remotely as of August 31, 2021 (“August 31, 2021 Subset”). As noted in the prior section, 38.7% of respondent firms had offered remote work as an option for employees at some point between March 2020 and the time the survey was taken, so this figure suggests a reduction in the number of employees that continued to work remotely through August 31, 2021.

Next, we calculate the proportion of employees working remotely among the August 31, 2021 Subset.

Table 1.4. Proportion of Employees Working Remotely Among Firms with Remote Workers as of August 31, 2021

Mean/Median	STATEWIDE	Honolulu County	Hawai'i County	Maui County	Kaua'i County
MEAN	50.52%	50.27%	53.55%	51.33%	45.47%
MEDIAN	43%	43%	50%	50%	33%

Q5. Has your company offered remote work as an option for some or all of your employees?



Amongst the August 31, 2021 Subset, respondents estimated that 50.52%, or half of their staff, were working remotely at least part of the time as of August 31, 2021. The median is lower at 43%, a more conservative estimate of the proportion of employees working remotely as of August 31, 2021.

- *Amongst the August 31, 2021 Subset, the proportion of employees working remotely declines as companies grow in size. For example, amongst firms with fewer than 50 employees in the August 31, 2021 Subset, 56.24% of their employees were working remotely as of August 31, 2021. This number drops to 31.22% amongst firms with 50 to 99 employees and bottoms out at 26.65% amongst firms with 100 or more employees.*

Next, those firms who had employees working remotely as of August 31, 2021 were asked where these employees were located.

Table 1.5. Remote Employees' Location Among Hawai'i Firms with Remote Workers as of August 31, 2021

Location	STATEWIDE	Honolulu County	Hawai'i County	Maui County	Kaua'i County
<i>Hawai'i</i>	91.10%	91.44%	88.77%	91.58%	88.53%
<i>Out-of-state</i>	8.90%	8.56%	11.23%	8.42%	11.47%
TOTAL	100%	100%	100%	100%	100%

Q6. How many of your employees worked remotely as of August 31, 2021?

The research shows that amongst firms who had employees working remotely as of August 31, 2021, a vast majority of them (91.10%) are based in-state.

The table below estimates the total number of private sector payroll employees working for Hawai'i firms on a remote basis both in- and out-of-state, as of August 31, 2021. This estimate was calculated by multiplying the number of employees each business respondent identified as being remote workers as of August 31, 2021 by its corresponding weight in proportion to its industry standing/proportion within the State (see the Methodology section for detail on weighting approach used). The figures noted below are the total estimated number of remote workers including both full- and part-time.

Table 1.6. Estimated Number of Private Sector Payroll Employees Working Remotely for Hawai'i Firms as of August 31, 2021

Location	STATEWIDE	Honolulu County	Hawai'i County	Maui County	Kaua'i County
<i>Hawai'i</i>	177,588	160,878	4,551	4,914	7,244
<i>Out-of-state</i>	20,636	19,000	353	628	656
TOTAL	198,224	179,878	4,904	5,542	7,900

Q6. How many of your employees worked remotely as of August 31, 2021?

Note: a. Estimated number of employees working remotely in Hawai'i = Weight x number of employees remote working



Next, we estimate the number of employees working remotely by industry and by county, as of August 31, 2021. This estimate was calculated by multiplying the total number of employees working remotely by its corresponding weight (each industry's proportional standing within the State, see Methodology section for detail on weighting approach used). The top five industries in each segment are shaded in the table below. Please note minor differences due to rounding when comparing total columns from this table and the prior section.

Table 1.7. Estimated Number of Private Sector Payroll Employees Working Remotely as of August 31, 2021 for Hawai'i Firms by Industry and Firm Location

Primary Industry	STATEWIDE	Honolulu County	Hawai'i County	Maui County	Kaua'i County
<i>Agriculture, Forestry, Fishing, and Hunting</i>	142	124	5	13	0
<i>Mining</i>	0	0	0	0	0
<i>Utilities</i>	150	132	18	0	0
<i>Construction</i>	4,902	3,908	14	259	721
<i>Manufacturing</i>	3,729	2,885	436	339	70
<i>Wholesale Trade</i>	872	724	68	80	0
<i>Retail Trade</i>	19,500	19,190	122	188	0
<i>Transportation and Warehousing</i>	841	597	171	46	28
<i>Information</i>	994	659	170	122	44
<i>Finance and Insurance</i>	7,409	5,795	374	1,140	100
<i>Real Estate, Rental Leasing</i>	17,302	11,234	689	259	5,120
<i>Professional, Scientific, and Technical Services</i>	25,408	23,337	682	1,146	243
<i>Management of Companies and Enterprises</i>	14,747	14,665	83	0	0
<i>Administrative and Support</i>	2,082	1,608	186	225	63
<i>Educational Services</i>	2,221	1,621	565	0	35
<i>Health Care and Social Assistance</i>	76,555	73,641	581	1,117	1,216
<i>Art, Entertainment, and Recreation</i>	1,036	785	75	107	68
<i>Accommodation</i>	1,166	764	47	165	191
<i>Food Services</i>	560	365	140	55	0
<i>Other Services</i>	18,359	17,783	295	282	0
<i>Waste Management and Remediation Services</i>	249	63	186	0	0
TOTAL	198,224	179,880	4,907	5,543	7,899

Q6. How many of your employees worked remotely as of August 31, 2021?

- Note:
- Estimated number of employees working remotely = Weight x (number of employees remote working in-state + number of employees remote working out-of-state), sum by industry by county
 - Shaded cells (yellow and blue) represent top five industries statewide/in each county with the highest prevalence of payroll employees working remotely as of August 31, 2021



2. OBSTACLES TO REMOTE WORK (OPEN-ENDED)

Those firms that did not offer remote work options for their employees at some point between March 2020 and the time the survey was taken because they indicated that the work could not be done remotely were asked to explain why this was. The top five responses are highlighted in yellow in the table below. Note: the responses in the table below were provided open-ended.

Table 2.1. Reasons Cited for Why Respondent Firms' Work Could Not be Done Remotely

Reasons	STATEWIDE n=957
<i>Job requires employee to be present</i>	26.7%
<i>Restaurant/bar</i>	14.8%
<i>Retail setting</i>	13.8%
<i>Need to see patients for medical/health care</i>	10.9%
<i>Construction work</i>	7.8%
<i>Don't need remote workers</i>	5.2%
<i>Maintenance work</i>	3.6%
<i>Deal with visitors</i>	3.0%
<i>Automotive work</i>	2.8%
<i>Visitor industry</i>	2.6%
<i>Operate equipment/machinery</i>	2.5%
<i>Choose to work in office</i>	1.9%
<i>Remote work not possible</i>	1.6%
<i>Remote work not offered</i>	0.4%
<i>Childcare- related</i>	0.4%
<i>Ocean-related</i>	0.4%
<i>Agriculture/farm work</i>	0.3%

Q5a. Why can't the work be done remotely?

Note: a. Shaded cells in yellow represent top five responses

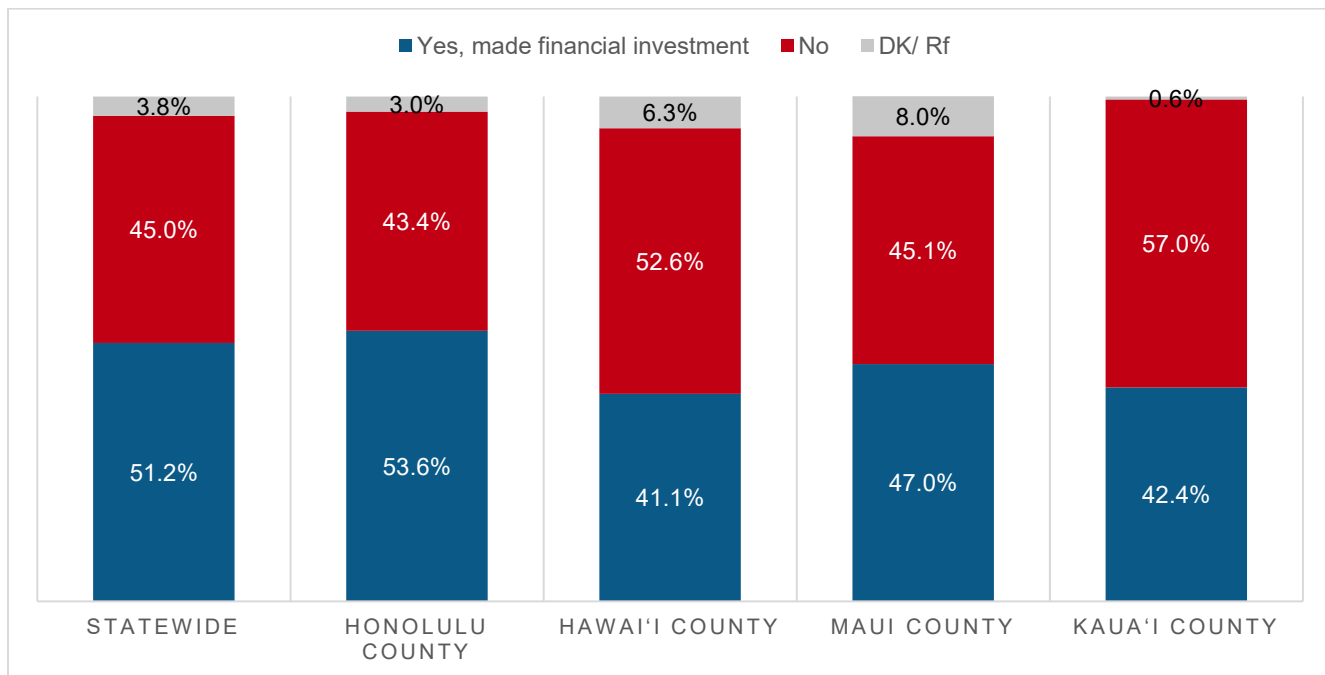
The top reason highlighted by this subset of the sample was simply that certain jobs needed to be performed in-person/on-site (26.7%). 14.8% of firms indicated work at a restaurant or bar, which necessitates in-person work, while 13.8% are in a retail setting that needs to have staffing on-site. 10.9% have jobs related to health care requiring employees to be present. 7.8% of firms indicated the reason they did not offer their employees remote work was because of construction work.



3. INVESTMENTS TO ENABLE REMOTE WORK

The table below highlights the proportion of respondent firms that made a financial investment to enable remote work, among those firms that offered remote work as an option (n=620) at any point to their employees.

Figure 3.1. Firms with Remote Workers that Made Financial Investments to Enable Remote Work



Q7. Has your company made any financial investments to enable remote work for your employees?

The research shows that amongst the firms that offered remote work as an option for their employees, half (51.2%) have made financial investments to enable this to happen.

Honolulu County firms that offered remote work to their employees were more likely to have invested financially in the process (53.6%) than were their Neighbor Island counterparts (43.9%).

- *As firms grow in size, so too does the likelihood of making capital investments to enable remote work. For example, 70.3% of firms having 100 or more employees and offered remote work to their employees invested financial assets to assist in this endeavor. This number drops to 57.4% amongst firms with 50 to 99 employees, and falls further to 47.9% amongst firms having less than 50 employees.*



Next, those firms that had made a financial investment to help facilitate remote work for their employees were asked to describe where these funds were directed from a set list of options provided in the table below. Note: when examining the results by county please note the small bases.

Table 3.1. Specific Investments Made Among Firms Having Expended Funds to Enable Remote Work

Type of Investments	STATEWIDE	Honolulu County	Hawai'i County	Maui County	Kaua'i County
<i>BASE</i>	314	211	39	42	22
<i>Purchased hardware for employees' use out of the office (e.g., laptops, monitors, desks, etc.)</i>	89.3%	91.0%	73.2%	87.6%	92.0%
<i>Implemented new communication /collaboration software (e.g., Zoom, Microsoft Teams, WebEx, Slack, etc.)</i>	82.2%	82.7%	88.0%	79.4%	69.0%
<i>Increased network security measures (e.g., VPN)</i>	60.9%	61.7%	49.6%	68.3%	46.0%
<i>Digitized operations that were previously paper-based</i>	52.3%	52.0%	54.5%	51.0%	56.5%
<i>Held virtual events to maintain/boost employee engagement</i>	48.5%	48.6%	41.8%	50.6%	52.8%
<i>Offered remote work training for employees</i>	34.5%	33.4%	22.2%	48.0%	44.5%

Q8. If company has made financial investments to enable remote work: Which of the following has your company done to enable remote work for your employees?

Note: a. Shaded cells in yellow represent statistically significant findings relative to those shaded in gray

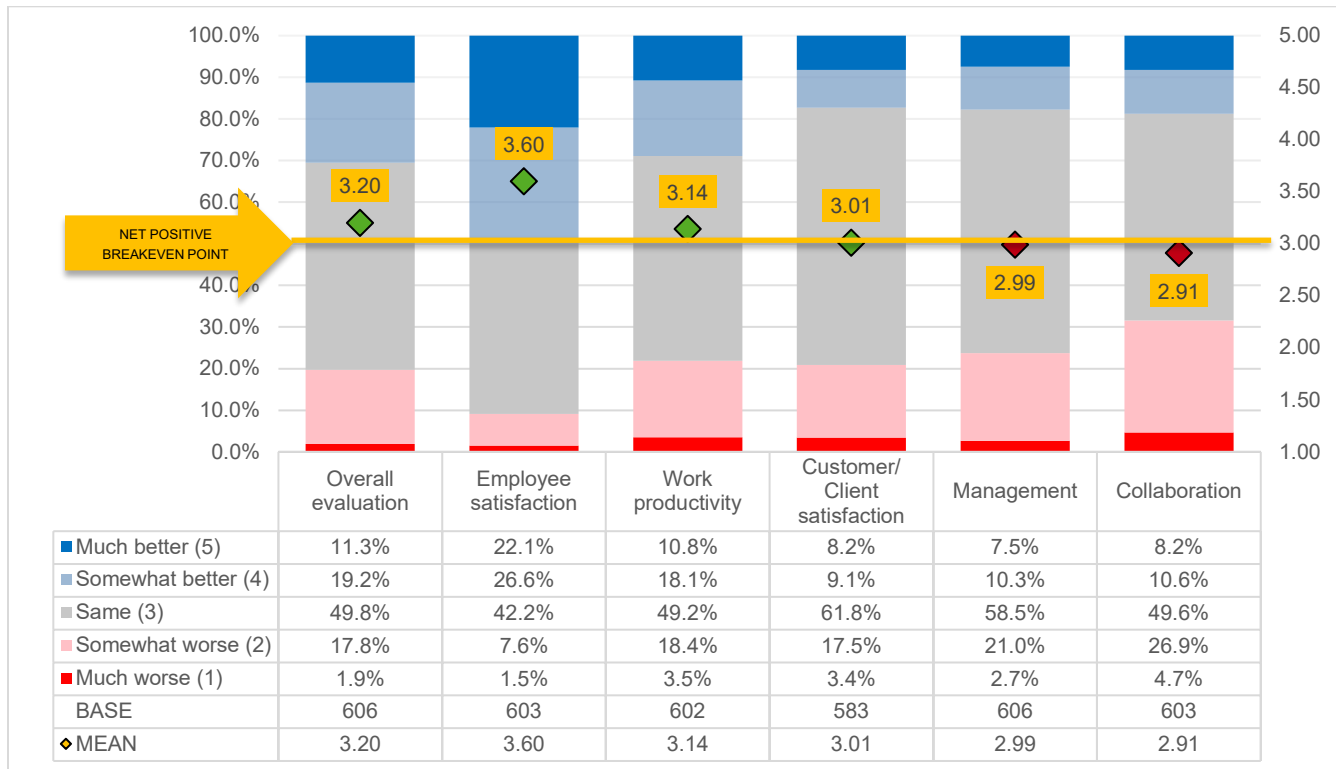
A solid majority of this subset of the sample purchased additional hardware for their employees to use outside of the office (89.3%). A near equal number (82.2%) implemented new communication and collaboration software. Roughly two-thirds (60.9%) increased network security measures. Half (52.3%) digitized operations that were previously done on paper, while 48.5% held virtual events to boost employee morale. A third (34.5%) of this subset of the sample offered remote work training for staff.

When segmented by county, we find the one statistically significant difference (highlighted in yellow) is that Honolulu County firms in this subset of the sample were more likely to purchase hardware for their employees to use outside of their office compared to Hawai'i County firms who fall into this category.

4. EXPERIENCE IN WORKING REMOTELY

In this section of the study, those firms that have offered remote work as an option were asked to rate their experience in the six areas listed in the figure below. Respondent firms were instructed to quantify their perceptions using a standard five-point rating scale. In addition to the percent results, a mean (average) score was also computed. The higher the score (closer to 5.00), the more positive the overall perception.

Figure 4.1. Evaluation of Remote Work Among Firms with Remote Workers



Q9. Overall, how would you evaluate your company's remote work experience compared to working from an office?

Amongst the six experience measurements tested, four received a mean score at or above the 3.00 middle point, signifying an overall positive reaction from respondents. These included (in descending order): *Employee satisfaction (3.60)*, *Overall evaluation (3.20)*, *Work productivity (3.14)*, and *Customer/Client satisfaction (3.01)*. At the opposite end, the two measurables that received a mean score below the 3.00 middle point, and signifying an overall negative reaction from respondents, were (in descending order): *Management of work (2.99)*, and *Collaboration at work (2.91)*.

- *Those firms that offered remote work as an option at some point, but no longer had employees working remotely as of August 31, 2021, gave statistically lower scores in each of six areas tested compared to those firms who were offering remote work to their employees as of August 31, 2021.*



The table below breaks out the mean scores of these six experience measures by county. The results show no statistically significant differences when segmented in this manner.

Table 4.1. Evaluation of Remote Work Among Firms with Remote Workers by County

Experience Measures	STATEWIDE	Honolulu County	Hawai'i County	Maui County	Kaua'i County
<i>Overall evaluation</i>	3.20	3.18	3.20	3.35	3.13
<i>Employee satisfaction</i>	3.60	3.62	3.62	3.61	3.33
<i>Work productivity</i>	3.14	3.14	3.12	3.21	3.02
<i>Customer/Client satisfaction</i>	3.01	2.97	3.04	3.16	3.18
<i>Management of work</i>	2.99	2.96	3.00	3.18	2.96
<i>Collaboration at work</i>	2.91	2.88	2.96	2.98	2.96

Q9. Overall, how would you evaluate your company's remote work experience compared to working from an office?



5. PERCEIVED BENEFITS

In this section of the study, those firms that offered remote work as an option and may continue to offer remote work post-pandemic were asked to identify any benefits they are currently achieving or hoping to achieve by offering this option post-pandemic from a list of options highlighted in yellow in the table below. The areas shaded in blue represent the most common open-ended comments offered voluntarily by respondents.

Table 5.1. Perceived Benefits of Remote Work Among Firms that May Continue Remote Work Post-Pandemic

Perceived Benefits	STATEWIDE	Honolulu County	Hawai'i County	Maui County	Kaua'i County
<i>BASE</i>	554	351	77	82	44
<i>Increased employee satisfaction</i>	66.0%	65.9%	68.7%	67.1%	58.6%
<i>Increased individual productivity</i>	45.6%	45.2%	48.8%	41.8%	56.1%
<i>Reduced operational costs</i>	44.5%	47.7%	34.4%	36.7%	33.4%
<i>Incentive to recruit and retain talent</i>	36.3%	38.2%	38.9%	24.7%	29.7%
<i>Access to a larger off-island talent pool</i>	21.5%	20.5%	24.1%	22.5%	31.3%
<i>None of these apply</i>	6.7%	6.4%	8.1%	5.9%	12.2%
<i>Flexibility</i>	2.7%	2.0%	3.8%	6.4%	1.3%
<i>Convenience</i>	2.3%	1.6%	1.3%	-	2.6%
<i>Safety</i>	1.4%	1.5%	1.3%	0.9%	-
<i>Less/No commuting</i>	1.0%	1.3%	-	-	-

Q11. What benefits are you currently achieving, or do you hope to achieve, by offering remote work to your employees post-pandemic?

Note: a. Dashes (-) indicate no data were available

b. Shaded cells in yellow represent set options; shaded cells in blue represent open-ended comments

Two-thirds (66.0%) of firms that may offer remote work as an option to their employees post-pandemic feel that increased employee satisfaction is a benefit of offering remote work to employees. Nearly half (45.6%) believe that productivity increases, while a near equal number (44.5%) agree that remote work reduces operational costs. Roughly a third (36.3%) feel it acts as an incentive to recruit and retain employees, while 21.5% feel they now have greater access to potential new employees off-island.

- *Honolulu County firms in this subset of the sample were more likely to mention reduced operational costs as a benefit of remote work (47.7%) than were those firms on the Neighbor Islands (35.3%).*
- *Amongst firms that offered remote work at some point but no longer had employees working remotely as of August 31, 2021, 15.7% felt that none of the options listed in yellow was a benefit of remote working.*



Next, those firms that stated in the prior section that one of the benefits to offering remote work post-pandemic they are/hoping to achieve is access to a larger off-island talent pool were asked to identify the type of talent they would hope to find. The results are summarized in the table below. Please note the responses are open-ended.

Table 5.2. Desired Talent Type Among Firms Seeking Access to Off-Island Talent Pool through Remote Work

Desired Talent Type	STATEWIDE n=124
<i>Other</i>	26.7%
<i>Technical/technology</i>	13.5%
<i>Accounting/finance/insurance</i>	10.0%
<i>Managers</i>	6.9%
<i>Workers with positive attitudes</i>	6.4%
<i>Administrative positions</i>	6.0%
<i>Customer/client service</i>	5.4%
<i>Medical field</i>	3.9%
<i>Education/teachers</i>	3.3%
<i>Hospitality/travel industry</i>	3.2%
<i>Legal</i>	3.1%
<i>Engineer/scientist</i>	2.9%
<i>Clerical</i>	2.5%
<i>Automotive</i>	2.3%
<i>Architect/drafting</i>	2.2%
<i>Advertising</i>	2.1%
<i>Sales/marketing</i>	1.7%
<i>Health and fitness</i>	1.6%
<i>Real estate</i>	1.4%

Q11a. What type of talent are you looking to find?

The only two definitive responses that exceeded 10% amongst this subset of the sample were technical/technology (13.5%) and accounting/finance/insurance (10.0%) talent.

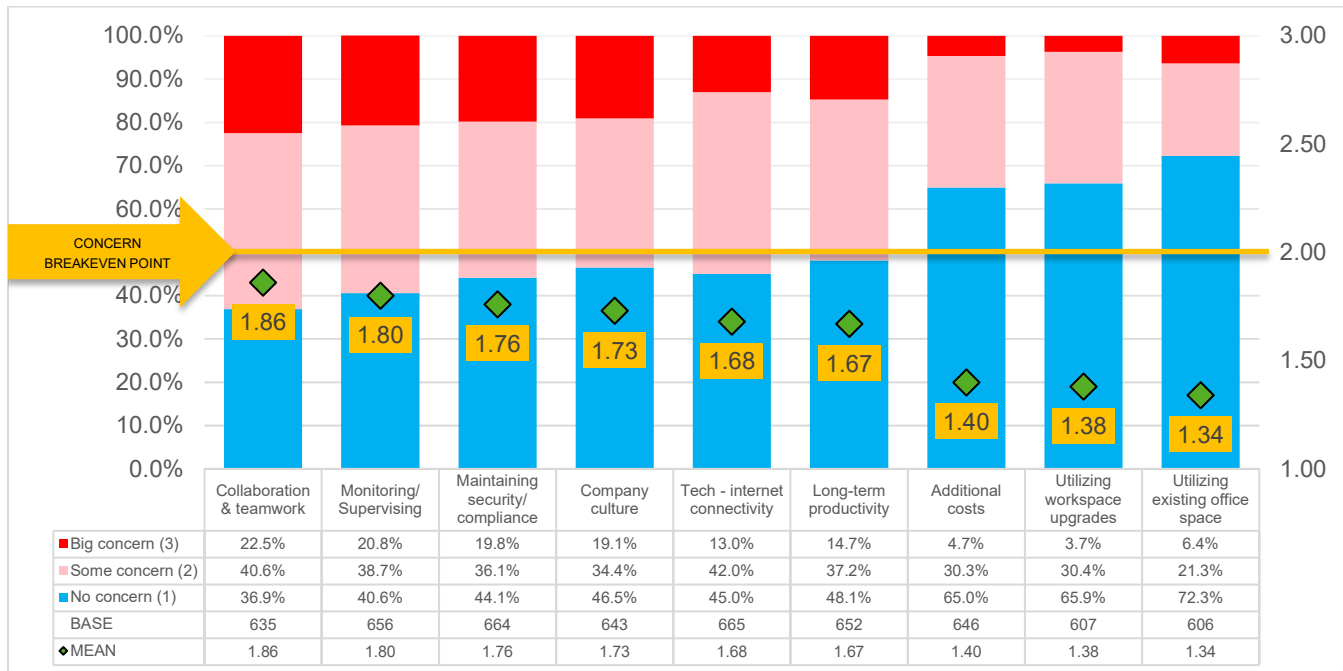
The top response of “other” was a catchall for generalized comments, such as those listed below.

- Volunteers*
- Field tradesmen*
- International relations expertise*
- Good employees*
- Skilled workers in the field*
- Trained talent in specific job/specialty you are hiring for*
- All types*
- One that fits our character needs*

6. CONCERNS

In this section of the study, respondent firms that offered remote work at some point were presented with a list of nine potential concerns related to remote work, listed in the figure below. Firms were asked to examine each issue using a three-point rating scale. In addition to the percent results, a mean (average) score was also computed. The higher the score (closer to 3.00), the greater the level of concern.

Figure 6.1. Remote Work Concerns Among Firms with Remote Workers



Q13. What concerns, if any, does your company have in deciding to offer remote work?

When examining the mean scores, we find the following three issues to be of minimal concern: *Additional costs incurred to support remote work (1.40)*, *Utilizing workspace upgrades that the company already made assuming working fully from the office (1.38)*, and *Utilizing existing office space owned or leased by the company (1.34)*.

Each of the other six issue areas showed slightly higher levels of concern, though none of the mean scores indicated extreme levels of apprehension. The top three issues that were of greatest concern were: *Difficulty in collaboration and teamwork (1.86)*, *Difficulty in monitoring and supervising work (1.80)*, and *Maintaining security and compliance for remote workers (1.76)*.

- Amongst firms that offered remote work at some point but no longer had employees working remotely as of August 31, 2021, the following were statistically more likely to be a concern compared to those firms that had remote workers as of August 31, 2021: *Difficulty in collaboration and teamwork*, *Difficulty in monitoring and supervising work*, *Negative impacts on company's*



long-term productivity, and Utilizing workspace upgrades that the company already made assuming working fully from the office.

The table below breaks out the mean scores of these nine concern measures by county.

Table 6.1. Remote Work Concerns Among Firms with Remote Workers by County

Remote Work Concerns	STATEWIDE	Honolulu County	Hawai'i County	Maui County	Kaua'i County
<i>Difficulty in collaboration and teamwork</i>	1.86	1.88	1.83	1.71	1.86
<i>Difficulty in monitoring and supervising work</i>	1.80	1.82	1.82	1.68	1.75
<i>Difficulty in maintaining company culture</i>	1.73	1.75	1.74	1.62	1.59
<i>Negative impacts on company's long-term productivity</i>	1.67	1.69	1.65	1.56	1.55
<i>Technical challenges due to unreliable internet connectivity</i>	1.68	1.64	1.81	1.79	1.76
<i>Maintaining security and compliance for remote workers</i>	1.76	1.77	1.74	1.67	1.75
<i>Additional costs incurred to support remote work</i>	1.40	1.40	1.58	1.23	1.43
<i>Utilizing existing office space owned or leased by the company</i>	1.34	1.36	1.28	1.26	1.44
<i>Utilizing workspace upgrades (e.g., equipment and technology that the company already made assuming working fully from the office)</i>	1.38	1.39	1.38	1.29	1.31

Q13. What concerns, if any, does your company have in deciding to offer remote work?

Note: a. Shaded cells in yellow represent statistically significant findings relative to those shaded in gray

When segmented in this manner, we find that technical challenges due to unreliable internet connectivity is statistically of less concern for Honolulu County firms than it is for their Neighbor Island counterparts. The only other statistically significant finding was that additional costs incurred to support remote work was of greater concern to firms in Hawai'i County compared to their counterparts in Maui County.

- *Difficulty in maintaining company culture is more of a concern for larger sized firms. For example, 16.2% of firms in this subset with fewer than 50 employees view this as a big concern, compared to 29.5% of firms having 100 or more employees.*



7. POST-PANDEMIC POLICY

In this next section, firms that offered remote work as an option to their employees at any point until the time the survey was taken were asked to select from the options listed in the table below regarding their company's post-pandemic remote work plans.

Table 7.1. Post-Pandemic Remote Work Plans Among Firms with Remote Workers

Remote Work Plans	STATEWIDE	Honolulu County	Hawai'i County	Maui County	Kaua'i County
<i>BASE</i>	610	390	87	84	49
<i>Remote work for all workdays will be allowed</i>	25.6%	25.4%	23.6%	28.7%	26.0%
<i>Remote work for some work days per week will be allowed</i>	25.4%	26.4%	27.1%	17.0%	24.8%
<i>We have not yet made a decision about future remote work</i>	22.9%	21.9%	25.1%	26.6%	26.8%
<i>All employees have returned or will return to office once the pandemic is over, but our company plans to offer remote work options in the near future</i>	14.7%	14.7%	9.4%	21.0%	11.0%
<i>Remote work will not be allowed when the pandemic is over</i>	11.3%	11.5%	14.9%	6.7%	11.5%
TOTAL	100%	100%	100%	100%	100%

Q10. Which one of the following best describes your company's plan for post-pandemic work for employees whose work can be done remotely?

Note: a. Due to rounding, totals may not precisely add up to 100%

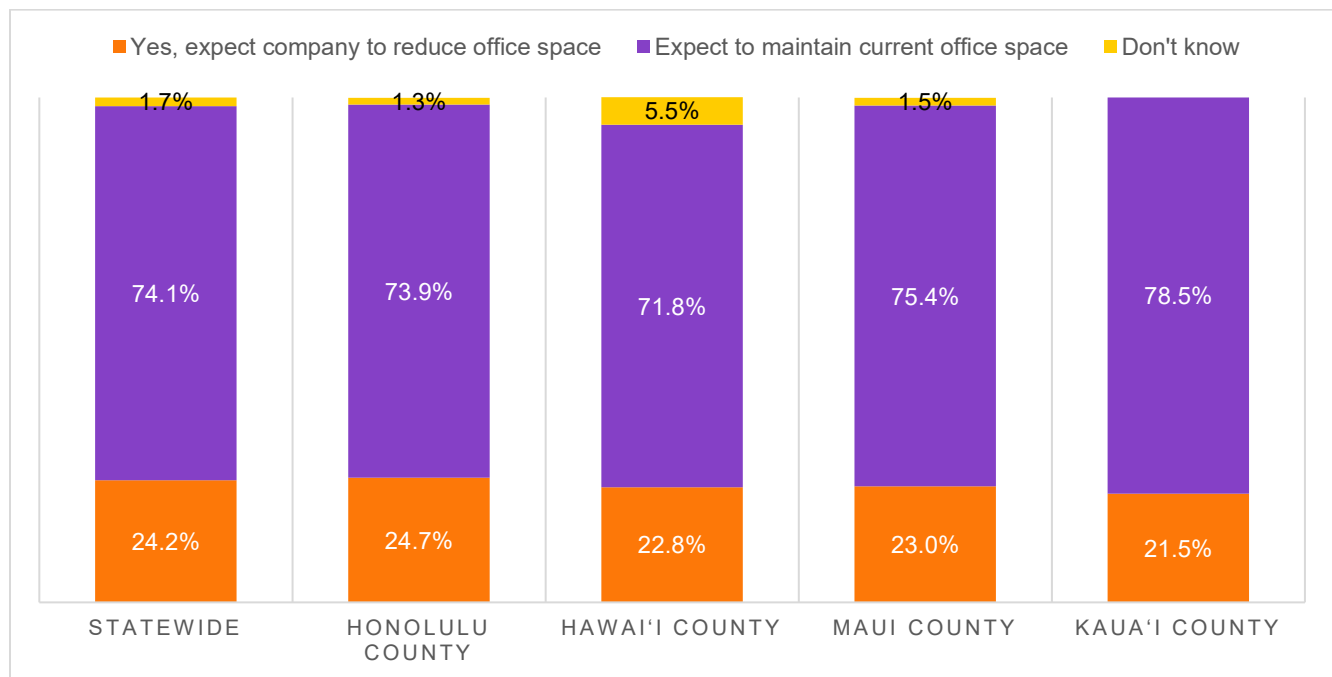
A majority (65.7%) of this subset of the sample expects to offer remote work in some form or another as an option in the future. 22.9% indicate that a decision regarding future remote work policies has not yet been made, while just 11.3% have ruled out remote work altogether once the pandemic has subsided.

- 58.5% of firms having remote workers as of August 31, 2021, indicate they plan to continue this practice for all or at least some days of the week. By comparison, just 14.1% of firms who offered remote work at some point but no longer had employees working remotely as of August 31, 2021, plan to do the same.



Next, respondent firms with remote workers that may offer remote work as an option to their employees post-pandemic (n=554) were asked if they anticipate making any changes to their office space footprint in direct relation to their future remote work policy.

Figure 7.1. Anticipated Office Space Impacts Among Firms that May Continue Remote Work Post-Pandemic



Q12. Do you expect your company will make changes to its office space if it adopts or extends remote work?

One in four (24.2%) of firms in this subset of the sample anticipate that they will reduce office space as it adapts to a future remote work environment. A large majority of firms (74.1%) do not expect to make any changes to their office space as a result of their post-pandemic remote work policies.



8. SUGGESTIONS FOR ENABLING REMOTE WORK

At the conclusion of the study, all respondents were asked what they felt would better facilitate remote work in the state. A list of options, highlighted in yellow in the table below, was provided, and respondents were also welcomed to provide open-ended comments which are shaded in blue.

Table 8.1. Hawai'i Firm Suggestions for Facilitating Remote Work in the State

Suggestions	STATEWIDE	Honolulu County	Hawai'i County	Maui County	Kaua'i County
<i>BASE</i>	1,661	861	316	314	170
<i>Improve broadband infrastructure</i>	43.2%	41.5%	46.7%	49.2%	39.8%
<i>Greater awareness of best practices for offering remote work opportunities to employees.</i>	41.0%	42.2%	36.1%	40.4%	40.4%
<i>None</i>	32.0%	32.1%	33.7%	31.1%	30.6%
<i>Increase remote work hubs/co-working locations.</i>	19.9%	20.1%	16.9%	22.6%	17.9%
<i>Accessibility to hardware/software/internet</i>	0.6%	0.8%	0.4%	-	-
<i>Clearer workplace guidelines</i>	0.5%	0.7%	0.3%	0.3%	-
<i>Need subsidies- low cost/free assistance</i>	0.5%	0.1%	0.3%	2.4%	0.9%
<i>Education/training</i>	0.4%	0.4%	0.8%	-	0.5%
<i>Recommendations/suggestion to implement</i>	0.4%	0.3%	0.3%	0.4%	0.9%
<i>Trust of employees</i>	0.3%	0.3%	0.8%	-	-
<i>Incentives</i>	0.3%	0.4%	0.5%	-	-
<i>Certain qualifications needed</i>	0.3%	0.3%	-	0.5%	0.5%
<i>Security concerns</i>	0.1%	0.1%	-	-	0.9%
<i>Improved benefits/salaries</i>	0.1%	0.1%	-	-	0.9%

Q14. What do you think would better facilitate remote work in Hawaii?

- Note:
- a. %s don't add up since multiple choices were permitted
 - b. Dashes (-) indicate no data were available
 - c. Shaded cells in yellow represent set options; shaded cells in blue represent open-ended comments

Overall, 43.2% of firms polled believe that improving broadband infrastructure is important to further enabling remote work in the islands. A near equal number (41.0%) feels that raising awareness of best practices for remote work would aid this type of work environment. Roughly one in five (19.9%) believes that increasing remote work hubs and/or co-working locations could help facilitate remote work.

The top three open-ended suggestions offered by respondent firms included: *Greater accessibility to hardware/software/internet, Clearer workplace guidelines, and Subsidies to reduce cost and/or provide free assistance.*



9. BUSINESS PROFILE

A total of 1,661 firms were surveyed for this study with 861 completed from Honolulu County, 316 from Hawai'i County, 314 from Maui County, and 170 from Kaua'i County.

NUMBER OF EMPLOYEES

All respondent firms were asked how many full- and part-time employees were working as of August 31, 2021.

Table 9.1. Firm Size by Full- and Part-Time Employee Count as of August 31, 2021

Firm Size	STATEWIDE	Honolulu County	Hawai'i County	Maui County	Kaua'i County
<i>BASE</i>	1,658	858	316	314	170
<i>1-4 employees</i>	26.2%	23.6%	33.5%	26.3%	38.2%
<i>5-9</i>	25.0%	23.4%	29.4%	28.8%	23.5%
<i>10-19</i>	19.9%	21.7%	16.2%	18.5%	11.8%
<i>20-49</i>	16.5%	17.2%	15.2%	15.6%	13.7%
<i>50-99</i>	6.2%	6.6%	3.1%	6.2%	8.4%
<i>100-249</i>	3.5%	4.3%	2.3%	1.6%	2.4%
<i>250-499</i>	1.7%	1.8%	0.3%	2.4%	1.5%
<i>500-999</i>	0.4%	0.5%	-	0.5%	-
<i>1,000+</i>	0.7%	0.9%	-	0.2%	0.4%
<i>MEAN</i>	42.62	52.00	15.83	30.95	27.93
<i>MEDIAN</i>	9	10	7	8	6

Q2. How many employees did your company have as of August 31, 2021?

Note: a. Dashes (-) indicate no data were available

Overall, the typical firm taking part in the study employed an average of 42.62 employees as of August 31, 2021. The median was significantly lower at nine employees. Firms in Honolulu County who took part in the study tended to be larger on average (52.00 mean employee count) than their Neighbor Island counterparts (24.71 mean employee count).

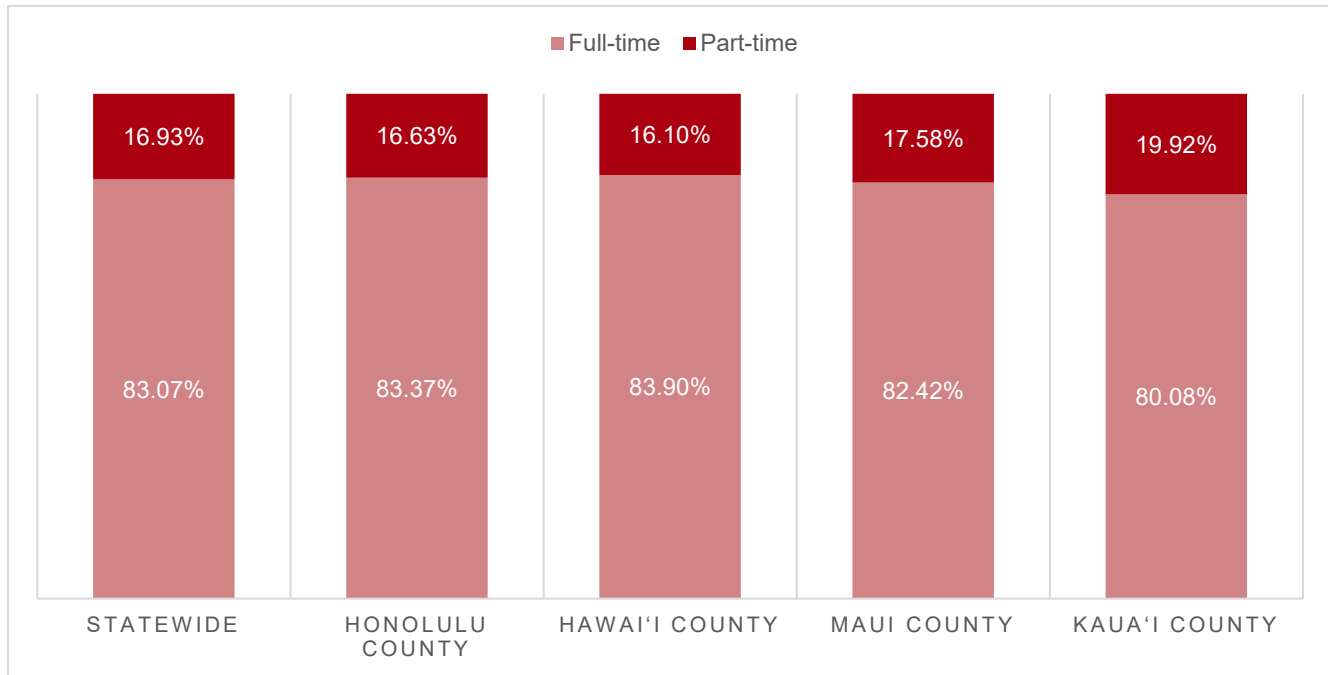
- *Firms having employees working remotely as of August 31, 2021 tended to be larger in size (76.10 mean employee count) compared to firms without any remote workers as of August 31, 2021 (26.75 mean average).*



EMPLOYEE TYPE

All respondent firms were asked for a breakdown of their employees by full-time and part-time status.

Figure 9.1. Proportion of Full- and Part-Time Private Sector Payroll Employees of Respondent Firms



Q2. How many employees did your company have as of August 31, 2021?

Of firms polled, 83.07% of their workforce were full-time, and 16.93% part-time. There were no statistically significant differences when segmented by county.



PRIMARY INDUSTRY

Next, all respondent firms were asked to identify their primary industry. The data were weighted to reflect statewide proportions by industry NAICS code, as detailed in the Methodology section.

Table 9.2. Respondent Firm by Primary Industry

Primary Industry	STATEWIDE	Honolulu County	Hawai'i County	Maui County	Kaua'i County
<i>BASE</i>	1,661	861	316	314	170
<i>Agriculture, Forestry, Fishing, and Hunting</i>	0.1%	0.1%	0.3%	0.1%	0.2%
<i>Mining</i>	0.0%	-	0.3%	-	-
<i>Utilities</i>	0.2%	0.1%	0.4%	0.3%	0.6%
<i>Construction</i>	8.9%	8.1%	9.6%	10.2%	11.2%
<i>Manufacturing</i>	2.4%	2.3%	2.6%	2.5%	2.3%
<i>Wholesale Trade</i>	4.7%	5.2%	4.0%	3.3%	3.6%
<i>Retail Trade</i>	14.0%	13.0%	15.0%	16.4%	16.5%
<i>Transportation and Warehousing</i>	3.0%	2.5%	4.6%	3.4%	3.8%
<i>Information</i>	1.7%	1.7%	1.6%	1.7%	1.1%
<i>Finance and Insurance</i>	6.2%	5.0%	4.3%	3.3%	3.3%
<i>Real Estate, Rental Leasing</i>	6.3%	6.0%	6.4%	7.1%	7.0%
<i>Professional, Scientific, and Technical Services</i>	10.2%	11.2%	8.1%	9.0%	6.9%
<i>Management of Companies and Enterprises</i>	0.9%	1.0%	1.5%	0.5%	-
<i>Administrative and Support</i>	5.0%	4.6%	4.9%	6.0%	7.2%
<i>Educational Services</i>	1.7%	1.8%	1.4%	1.7%	1.6%
<i>Health Care and Social Assistance</i>	11.4%	12.0%	11.5%	9.7%	9.0%
<i>Art, Entertainment, and Recreation</i>	1.7%	1.2%	1.8%	3.0%	2.8%
<i>Accommodation</i>	2.9%	2.5%	2.5%	4.1%	5.0%
<i>Food Service</i>	9.1%	9.6%	8.9%	7.1%	8.7%
<i>Other Services</i>	11.0%	11.7%	9.7%	10.3%	9.1%
<i>Waste Management and Remediation Services</i>	0.4%	0.4%	0.5%	0.5%	-

Q1. Please select your company's primary industry.

Note: a. Dashes (-) indicate no data were available



MAIN OFFICE LOCATION

All respondent firms were then asked to identify the location of their main office.

Table 9.3. Respondent Firm's Main Office Location

Location	STATEWIDE	Honolulu County	Hawai'i County	Maui County	Kaua'i County
<i>BASE</i>	1,661	861	316	314	170
<i>Honolulu County</i>	65.0%	96.5%	4.4%	3.8%	8.2%
<i>Hawai'i County</i>	11.9%	0.3%	90.8%	0.3%	-
<i>Maui County</i>	14.3%	0.5%	1.5%	91.8%	2.8%
<i>Kaua'i County</i>	6.1%	-	1.1%	-	88.5%
<i>U.S. State</i>	2.4%	2.4%	2.1%	3.7%	0.4%
<i>Other country/U.S. Territory</i>	0.2%	0.3%	-	-	-
<i>Refused</i>	0.1%	-	-	0.4%	-

Q3. Where is the main office of your company located?

- Note:
- a. Dashes (-) indicate no data were available
 - b. Shaded cells (green) represent the most prevalent main office location for respondent firms in each county among

Overall, 65% of respondent firms indicated the main branch or office of the firm is located in Honolulu County. 14.3% of respondent firms' main offices were located in Maui County, 11.9% in Hawai'i County, and 6.1% in Kaua'i County.

Most of the firms polled indicated their main office is in the same county as the firm on behalf of which they were responding to the survey (see green shaded regions in table above).

RESPONDENT ROLE

Research respondents were asked to identify their current title or position with the firm on behalf of which they were responding to the survey.

Table 9.4. Respondent Role

Respondent Role	STATEWIDE	Honolulu County	Hawai'i County	Maui County	Kaua'i County
<i>BASE</i>	1,661	861	316	314	170
<i>Owner/executive</i>	42.4%	41.1%	44.9%	44.4%	46.3%
<i>Other manager</i>	33.6%	33.8%	33.9%	32.2%	34.1%
<i>Administrative</i>	10.9%	11.3%	10.1%	11.1%	7.1%
<i>Other</i>	7.1%	7.6%	5.7%	6.0%	8.2%
<i>HR manager</i>	5.9%	6.1%	5.3%	6.2%	4.3%
<i>Refused</i>	0.1%	0.1%	-	-	-

Q4. What is your position in this company?

- Note:
- a. Dashes (-) indicate no data were available

A majority of the respondents were either owners/executives (42.4%) or managers (33.6%). Roughly one in ten (10.9%) held an administrative position, while 5.9% were human resource managers.



EMPLOYEE SURVEY

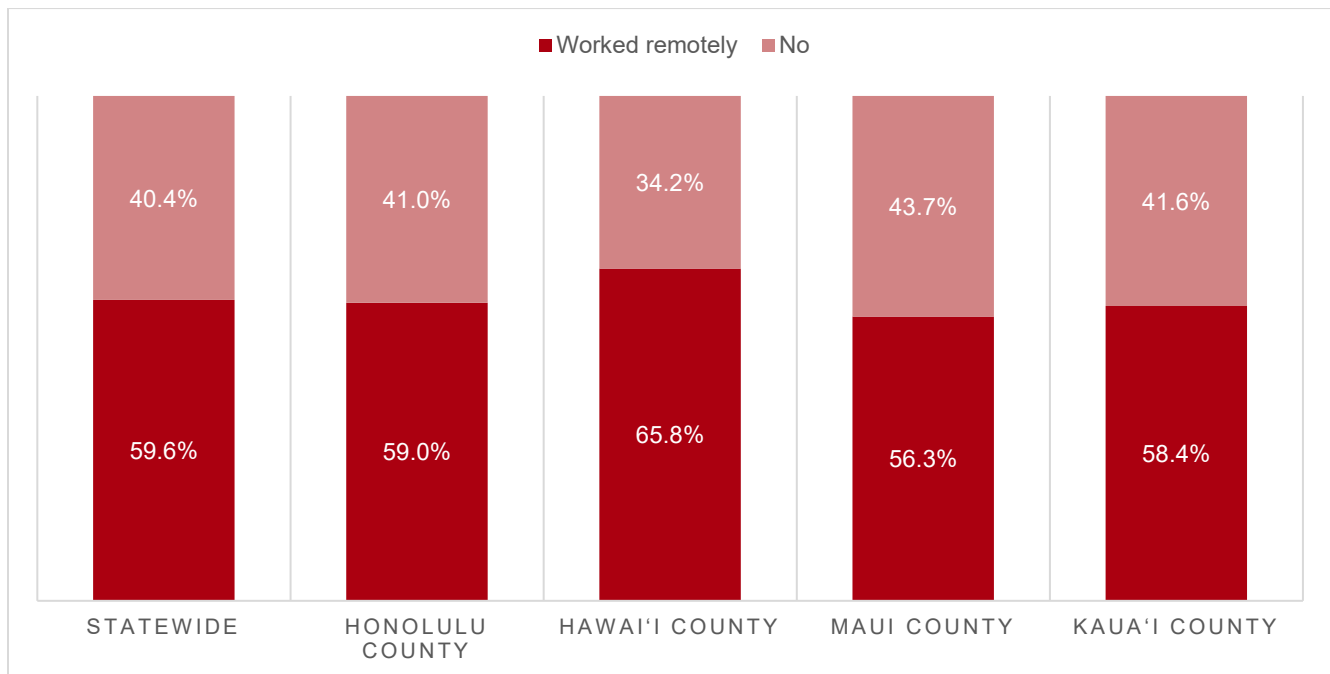
The sampling frame for the employee survey included Hawai'i residents ages 18 years and older and those employed or currently looking for work. The survey screened out respondents that were not residents of the state, active-duty military, and those unemployed/not looking for work and retired. A total of 176,610 contacts were made with Hawai'i residents, of which 5,462 qualified and completed the survey for a response rate of 3.09%. 2,809 surveys were completed from individuals in Honolulu County, 1,244 from Hawai'i County, 936 from Maui County, and 462 from Kaua'i County.

10. REMOTE WORK PRACTICES

WORKED REMOTELY AT SOME POINT SINCE ONSET OF THE PANDEMIC

Research respondents were asked if they had worked remotely at any point from the start of the COVID-19 pandemic in March 2020 to the time they completed the survey.

Figure 10.1. Incidence of Remote Work Among Employees



Q1. Did you work remotely/from home at any point during the COVID-19 pandemic (since March 2020)?

Overall, 59.6% of those polled have worked remotely at some point in time between the start of the pandemic in March 2020 and the time of the survey. Respondents from Hawai'i County were the most likely to have experienced remote work (65.8%) when compared to the other three counties.



- *Those who are paid on an hourly basis were less likely to have worked remotely during the pandemic (36.8%). By comparison, 73.2% of those who earn a salary worked on a remote basis at some point since the start of the pandemic.*
- *The likelihood of having worked remotely at some point since the start of the pandemic is higher amongst those having attained higher levels of education. For example, 72.2% of college graduates worked remotely during the pandemic. This number drops to 48.2% amongst those without a college degree.*
- *Those with longer work commutes were more likely to have worked remotely at some point since the start of the pandemic. 71.0% of those with a daily work commute of over half an hour worked remotely during the pandemic. This number drops to 53.0% amongst those whose commute is less than 15 minutes.*

IMPACT OF THE PANDEMIC

Those respondents who worked remotely at some point since March 2020 were then asked if this work arrangement was the direct result of their employer’s response to the COVID-19 pandemic.

Table 10.1. Impact of the COVID-19 Pandemic on Incidence of Remote Work Among Employees

Yes/No	STATEWIDE	Honolulu County	Hawai'i County	Maui County	Kaua'i County
<i>BASE</i>	3,534	1792	852	594	296
<i>Yes, in response to pandemic</i>	83.7%	83.7%	84.3%	84.5%	80.2%
<i>No</i>	16.3%	16.3%	15.7%	15.5%	19.8%

Q1a. Did you start working remotely at the direction of your employer, due to a workplace response to COVID-19?

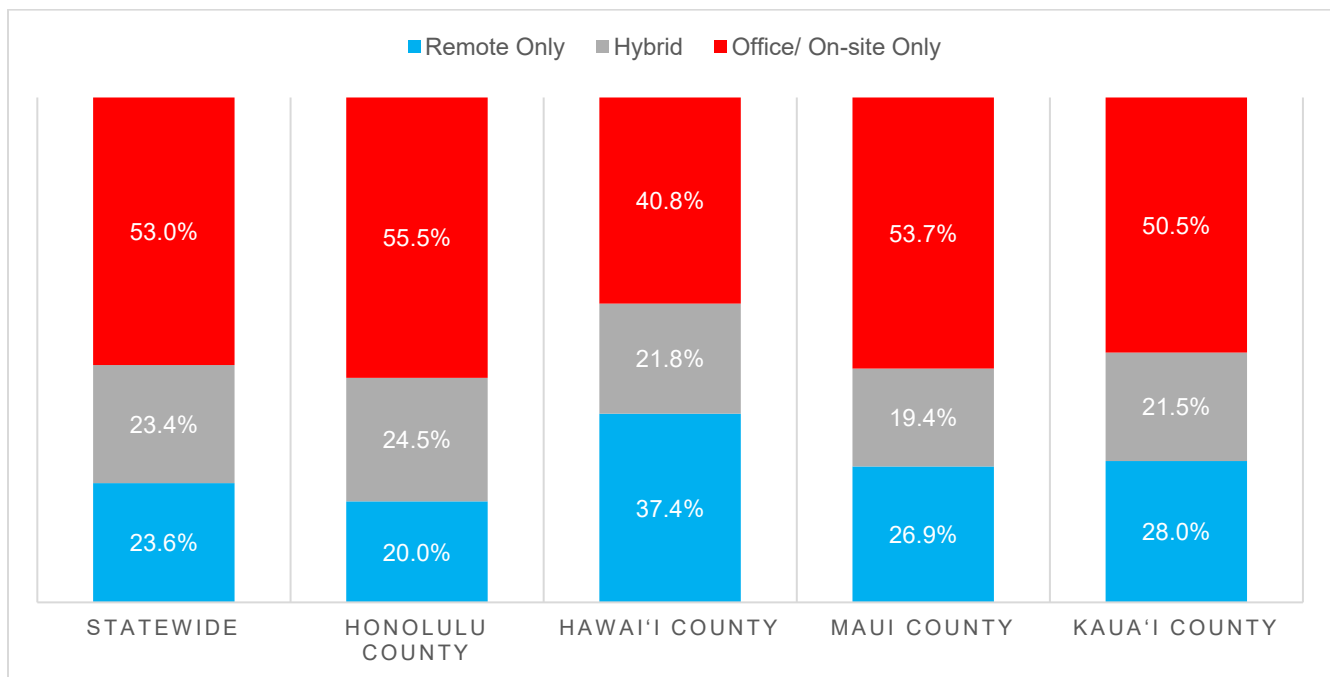
For a majority (83.7%) of those polled, the ability to work remotely was, in fact, influenced by the ongoing COVID-19 pandemic.



REMOTE WORK STATUS AT TIME OF SURVEY

Next, those who indicated they worked remotely at some point since the start of the pandemic were asked about their remote work status at the time of the survey.

Figure 10.2. Work Setting at Time of the Survey Among Respondents Who Worked Remotely at Some Point Since March 2020



Q1b. In which setting are you currently working?

Roughly one in four (23.6%) respondents was working exclusively on a remote basis at the time they completed the survey. A near equal number (23.4%) were operating in a hybrid fashion, going into the office and/or on-site only part of the time. The remaining 53.0% were working exclusively at the office and/or on-site.

When segmented by county, we find Honolulu County respondents less likely to have been working remotely on an exclusive basis (20.0%) compared to Neighbor Island respondents (31.7%). Further, we find those in Hawai'i County the most likely to have been working remotely on an exclusive basis at the time of the survey (37.4%).



The table below combines remote only and hybrid workers to provide a combined figure of the proportion of respondents who were working remotely at least part of the time at the time of the survey. Overall, nearly half (47.9%) of the workforce polled was working remotely either on a full-time basis or under a hybrid system at the time of the survey.

Table 10.2. Remote Work vs. Non-Remote Work Setting at Time of the Survey Among All Respondents

Work Setting	STATEWIDE	Honolulu County	Hawai'i County	Maui County	Kaua'i County
<i>BASE</i>	5,451	2,809	1,244	936	462
<i>Remote only or Hybrid combined</i>	47.9%	45.7%	59.9%	46.6%	50.6%
<i>In office/on-site exclusively</i>	52.1%	54.3%	40.1%	53.4%	49.4%

Q1b. In which setting are you currently working?

- Like those who worked remotely at some point since the start of the pandemic, those working remotely either on a full-time or hybrid basis at the time of the study were less likely to be hourly wage-earners (27.4%) than salaried employees (58.0%).
- Like those who worked remotely at some point since the start of the pandemic, those working remotely at the time of the study were more likely to have a longer daily commute. 41.1% of those with a daily commute of under 15 minutes were working remotely at least part of the time. This number increases to 45.5% for those with commutes ranging anywhere from 15 to 30 minutes, and tops out at 56.0% amongst those whose work commute exceeds 30 minutes.
- Respondents reporting higher income levels were more likely to be working remotely at the time of the survey. For example, 66.6% of those with an income in excess of \$100,000 were working remotely on a full-time or hybrid basis. This number drops to 51.2% amongst those who earn between \$50,000 to \$100,000, and 35.7% amongst those make less than \$50,000.
- Those who live with a child in their homes were more likely to be working remotely in some fashion at the time of the survey (51.8%) compared to those who do not live with a child (44.4%).



HYBRID REMOTE WORKERS

In this section of the study, respondents who reported a hybrid remote work status (going into the office and/or on-site only part of the time) at the time of the survey were asked to estimate the number of days in a typical week they spend working in each environment. The table below summarizes the mean (average) number of days along with the median (midpoint) figure reported by respondents for each environment.

Table 10.3. On-Site and Remote Workdays per Week Among Hybrid Respondents by County

Mean/Median	STATEWIDE	Honolulu County	Hawai'i County	Maui County	Kaua'i County
REMOTE WORK					
MEAN	2.82	2.76	3.09	2.98	2.63
MEDIAN	3	3	3	3	3
OFFICE/ON-SITE					
MEAN	2.53	2.51	2.54	2.49	2.80
MEDIAN	3	3	2	2	3

Q1c. (If hybrid/combination) How many days (partial or full) a week are you currently working remotely or in an office?

The results show the two work environments split fairly evenly, with a slightly higher mean number of days reported in a remote work setting (2.82 days) than in an office/on-site (2.53 days).

- Those who were working in a hybrid system without a college degree spend statistically more time in the office/on-site (3.00 median days) compared to hybrid workers who have a college degree (2.50 median days).

REMOTE ONLY – RETURN TO OFFICE

Those who were working exclusively on a remote basis at the time of the survey were asked if at any point during the pandemic they returned to the office/on-site for work.

Table 10.4. Temporary Return to Office Among Respondents Who Exclusively Worked Remotely at Time of the Survey

Yes/No	STATEWIDE	Honolulu County	Hawai'i County	Maui County	Kaua'i County
BASE	1,511	613	488	277	133
Yes, returned to office	36.9%	32.9%	45.0%	41.7%	36.1%
No	63.1%	67.1%	55.0%	58.3%	63.9%

Q1d. (If remote only) At any point since the start of the pandemic, did you temporarily return to working in an office?

Note: a. Shaded cells in yellow represent statistically significant findings relative to those shaded in gray

Roughly a third (36.9%) of those who were working remotely on an exclusive basis at the time of the survey returned to the office/on-site at some point during the pandemic. This was more likely to occur on the Neighbor Islands than in Honolulu County, as indicated by the yellow highlights in the above table.



- *Of respondents who reported working exclusively remotely at the time of the survey, those without a college degree were more likely to have gone back into the workplace at any point since the start of the pandemic (47.6%) compared to those with a college degree (25.6%).*
- *The shorter the work commute among respondents working exclusively on a remote basis, the more likely they were to have returned to the office at some point since the start of the pandemic. For example, 51.4% of those reporting a daily commute of under 15 minutes returned to their office/on-site. This number drops to 27.9% amongst those with commutes of over 30 minutes.*
- *Amongst those who reported working exclusively remotely, those who work on a part-time basis were less likely to have returned to the workplace at some point since the start of the pandemic (19.7%) compared to full-time employees (40.5%).*

CHANGE IN REMOTE WORK STATUS

In the table below, we examine how the proportion of remote workers has changed between March 2020 and the time of the survey.

Table 10.5. Change in Remote Work Incidence from Onset of the Pandemic to Time of the Survey

Change in Remote Work	STATEWIDE	Honolulu County	Hawai'i County	Maui County	Kaua'i County
<i>BASE</i>	5,451	2,809	1,244	936	462
<i>Worked remotely at some point since March 2020</i>	59.6%	59.0%	65.8%	56.3%	58.4%
<i>Worked remotely (full-time or hybrid) at time of the survey</i>	47.9%	45.7%	59.9%	46.6%	50.6%
<i>Change in incidence of remote work</i>	(11.7%)	(13.3%)	(5.90%)	(9.7%)	(7.8%)

Overall, the percentage of workers in a full-time or hybrid remote work environment at the time of the survey was down 11.7% compared to those having worked remotely at some point since the start of the pandemic in March 2020. The largest drop is seen in Honolulu County, where 59.0% of respondents worked remotely at some point since the start of the pandemic compared to 45.7% who reported working remotely in some fashion at the time of the study.



The table below highlights respondents' employer type segmented by whether they worked remotely at some point since the start of the pandemic and whether they were working remotely at the time of the survey.

Table 10.6. Respondent Remote Work Status by Employer Type

EMPLOYER TYPE	REMOTE WORKER AT ANY POINT SINCE PANDEMIC ONSET		REMOTE WORKER AT TIME OF SURVEY	
	Yes	No	Full-time/ Hybrid	No
BASE	3,534	1,917	2,913	2,538
<i>Private sector – For-profit</i>	55.5%	44.5%	46.9%	53.1%
<i>Private sector – Non-profit</i>	68.7%	31.3%	52.1%	47.9%
<i>Government – Local</i>	54.1%	45.9%	34.6%	65.4%
<i>Government – State</i>	80.4%	19.6%	48.0%	52.0%
<i>Government – Federal</i>	61.8%	38.2%	44.2%	55.8%
<i>Self-employed</i>	56.8%	43.2%	52.7%	47.4%
TOTAL	59.6%	40.4%	47.9%	52.1%

Q16. Which of the following best describes your employment?

Among government workers as a whole, County government workers had the lowest percentage of remote workers between the start of the pandemic and the time of the survey (54.1%). 34.6% of County workers indicated they were still working remotely at the time they were surveyed.

By contrast, State government workers saw the highest percentage of workers having worked remotely at some point since the start of the pandemic (80.4%). However, this category of worker saw the largest reduction of remote workers at the time of survey to 48.0%, among all employer types.

Among the private sector, non-profit workers outpaced for-profit workers in terms of both the proportion of employees who worked remotely at some point since the onset of the pandemic (68.7% and 55.5%, respectively), and those working remotely at the time of survey (52.1% and 46.9%, respectively).

Self-employed individuals saw the smallest reduction of those who reported working remotely at some point since the start of the pandemic (56.8%) compared to those working remotely at the time of survey (52.7%).



Next, the table below breaks out remote work status by occupation.

Table 10.7. Respondent Remote Work Status by Occupation

OCCUPATION	REMOTE WORKER AT ANY POINT SINCE PANDEMIC ONSET		REMOTE WORKER AT TIME OF SURVEY	
	Yes	No	Full-time/ Hybrid	No
BASE	3,534	1,915	2,913	2,536
<i>Management</i>	69.0%	31.0%	58.2%	41.8%
<i>Sales</i>	52.3%	47.7%	45.2%	54.8%
<i>Office and admin support</i>	69.4%	30.6%	52.1%	47.9%
<i>Business/Financial operations</i>	76.0%	24.0%	64.3%	35.7%
<i>Educational instruction/Library</i>	83.1%	16.9%	49.9%	50.1%
<i>Food prep/serving related</i>	22.4%	77.6%	18.4%	81.6%
<i>Healthcare practitioners/tech</i>	47.3%	52.7%	36.2%	63.8%
<i>Healthcare support</i>	52.5%	47.5%	43.9%	56.1%
<i>Transportation and material moving</i>	27.7%	72.3%	23.9%	76.1%
<i>Personal care and service</i>	38.4%	61.6%	34.6%	65.4%
<i>Community and social service</i>	79.8%	20.2%	67.5%	32.5%
<i>Computer and mathematical</i>	84.5%	15.5%	71.1%	28.9%
<i>Arts, design, entertainment, sports, and media</i>	76.3%	23.7%	69.5%	30.5%
<i>Construction and extraction</i>	33.4%	66.6%	23.7%	76.3%
<i>Architecture and engineering</i>	79.0%	29.0%	65.2%	34.8%
<i>Installation, maintenance, and repair</i>	29.8%	70.2%	24.6%	75.4%
<i>Legal</i>	86.2%	13.8%	65.9%	34.1%
<i>Production</i>	36.9%	63.1%	29.2%	70.8%
<i>Building and grounds cleaning and maintenance</i>	24.3%	75.7%	23.3%	76.7%
<i>Protective services</i>	31.1%	68.9%	22.1%	77.9%
<i>Life, physical, social science</i>	80.5%	19.5%	63.1%	36.9%
<i>Farming, fishing, forestry</i>	42.1%	57.9%	32.2%	67.8%
<i>Government worker</i>	50.0%	50.0%	44.1%	55.9%
TOTAL	59.6%	40.4%	47.9%	52.1%

Q18. Please select your occupation.

Note: a. Shaded cells (blue and red) represent the top five occupations having the highest incidence of remote workers

When the results are segmented by occupation, we find those in the *Legal* field the most likely to have worked remotely at some point since the start of the pandemic (86.2%), followed by those in *Computer and mathematical* fields (84.5%). Rounding out the top five occupations with the highest incidence of workers that have worked remotely at some point since the onset of the pandemic were (in descending order): *Education instruction/Library* (83.1%), *Life, physical, social science* (80.5%), and *Community and social service* (79.8%). The occupation with the lowest incidence of workers who worked remotely at some point since the onset of the pandemic was *Food prep/serving related* (22.4%).

By contrast, those working in *Computer and mathematical* fields were the most likely to be working remotely at the time of survey (71.1%), followed by: *Arts, design, entertainment, sports, and media* (69.5%), *Community and social service* (67.5%), *Legal* (65.9%), and *Architecture and engineering*



(65.2%). Once again, those working in *Food prep/serving* related occupations were the least likely to be working remotely at the time of survey (18.4%).

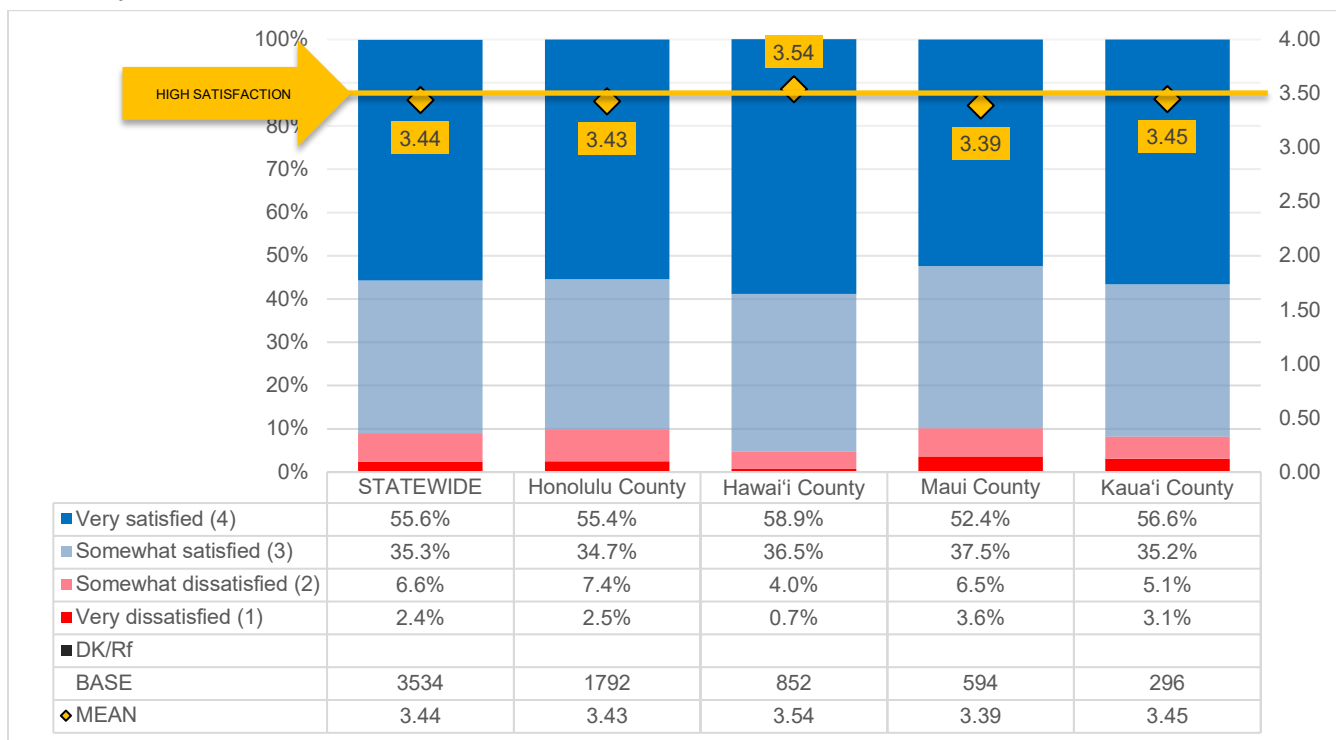
The three occupations that saw the greatest reduction of those who reported working remotely at some point since the start of the pandemic compared to those working remotely at the time of survey were (in descending order): *Education instruction/Library* (33.2% reduction), *Legal* (20.3% reduction), and *Life, physical, social science* (17.4% reduction).



11. EMPLOYEE SATISFACTION WITH REMOTE WORK

Those respondents who worked remotely at any point between March 2020 and the time of the survey were asked to rate their overall level of satisfaction with the experience. They were instructed to quantify their perceptions using a standard four-point rating scale as shown in the table below. In addition to the percent results, a mean (average) score was also computed. The higher the score (closer to 4.00), the more positive the overall perception.

Figure 11.1. Employee Satisfaction with Remote Work Among Respondents Who Have Worked Remotely at Some Point from Onset of the Pandemic



Q2. How satisfied were/are you with working remotely?

Overall, those who have worked remotely at some point since the start of the pandemic appear extremely satisfied with the experience, with a mean (average) score of 3.44 out of a possible 4.00.

A little over half (55.6%) were very satisfied with their remote work experience, expressing a very high degree of employee satisfaction. 35.3% were somewhat satisfied with their experience, while 9.0% indicated they were somewhat or very dissatisfied (6.6% and 2.4%, respectively).

When segmented by county, we find especially high scores from remote workers in Hawai'i County.

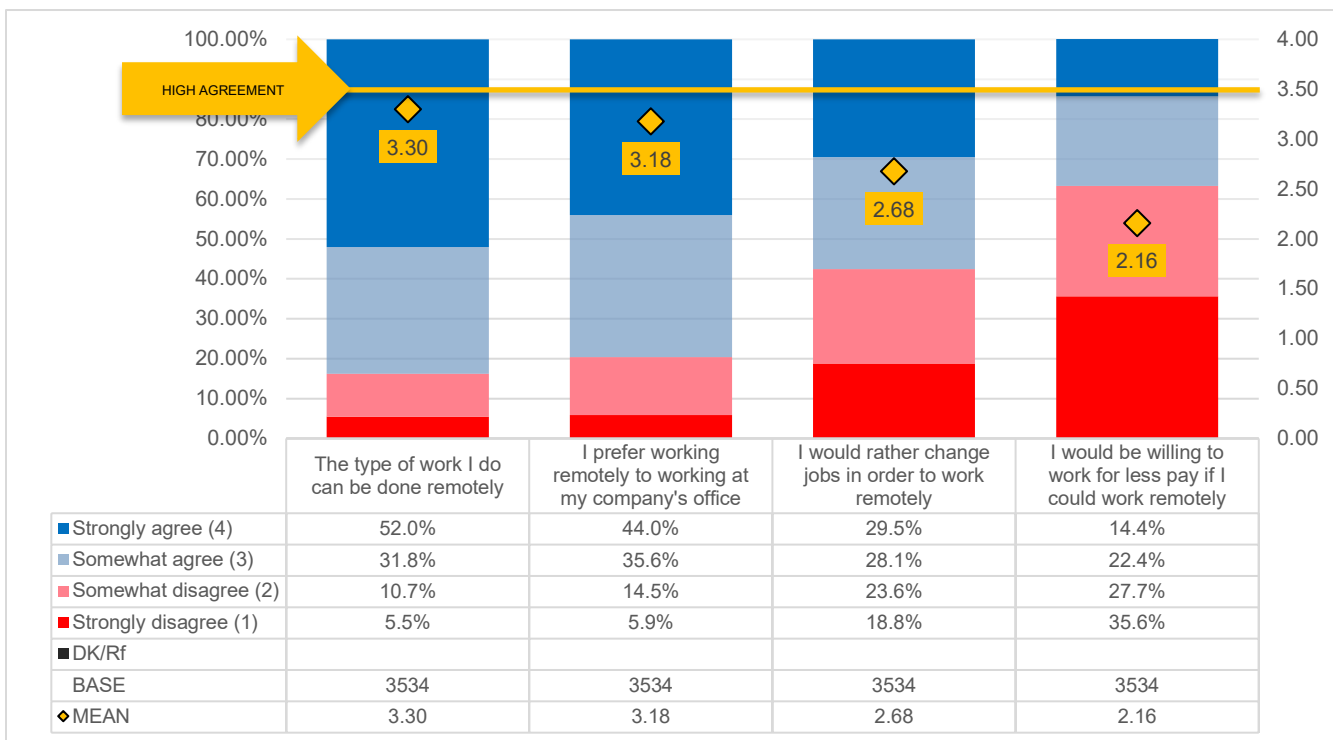


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- *Those remote workers who had returned to the office/workplace on an exclusive basis at the time of the survey were less satisfied with remote work (38.9% very satisfied) when compared to those who were still working remotely in some fashion (59.7% very satisfied).*
 - *Satisfaction with the remote work experience is higher amongst those reporting higher income levels. For example, amongst those with an income of \$100,000 or more, 63.2% provided a very satisfied score. This number drops to 51.6% amongst those who earn below \$50,000.*
 - *Those living with a child in their household gave statistically higher mean satisfaction scores (3.47) compared to their counterparts who do not live with any children (3.41).*
 - *Those having longer commute times to the office/workplace reported a greater level of satisfaction with their remote work experience. 60.5% of those having a commute time exceeding 30 minutes were very satisfied with their remote work experience. This number drops to 48.2% amongst those having a 15 minute commute time.*
 - *When segmented by level of education, we find those with a college degree reported being more satisfied with their remote work experience (58.8% very satisfied) compared to those who do not have a college degree (51.3% very satisfied).*

12. GENERAL PERCEPTIONS RELATED TO REMOTE WORK

In this section of the study, research respondents who worked remotely at any point between March 2020 and the time of the survey were asked to rate how strongly they agreed or disagreed with each of four statements regarding their perceptions/preferences about remote work. They were instructed to quantify their responses using a standard four-point rating scale as shown in the table below. In addition to the percent results, a mean (average) score was also computed. The higher the score (closer to 4.00), the stronger the level of agreement.

Figure 12.1. General Perceptions of Remote Work Among Respondents Who Have Worked Remotely at Some Point from Onset of the Pandemic



Q3. How much do you agree or disagree with the following statements about remote work?

Overall, most agree that the type of work that they perform can be done on a remote basis (52.0% strongly agree), and that they prefer to work remotely over working in an office setting (44.0% strongly agree). Respondents were less certain regarding their preference to change jobs in order to work on a remote basis (29.5% strongly agree), and their willingness to take a pay cut in order to be able to work remotely (14.4% strongly agree).



SEGMENTATION RECAP

In this section, we examine the statistically significant differences in responses to the above four statements regarding remote work perceptions/preferences, between various segments of the sample. These statistically significant differences were based on mean scores highlighted for each of the different demographic segments that are highlighted throughout the report. Those segments spotlighted in the table below were statistically higher compared to at least one other comparable segment related to that specific demographic variable being highlighted.

Table 12.1. Segmentation Summary – General Perceptions of Remote Work Among Respondents Who Have Worked Remotely at Some Point from Onset of the Pandemic

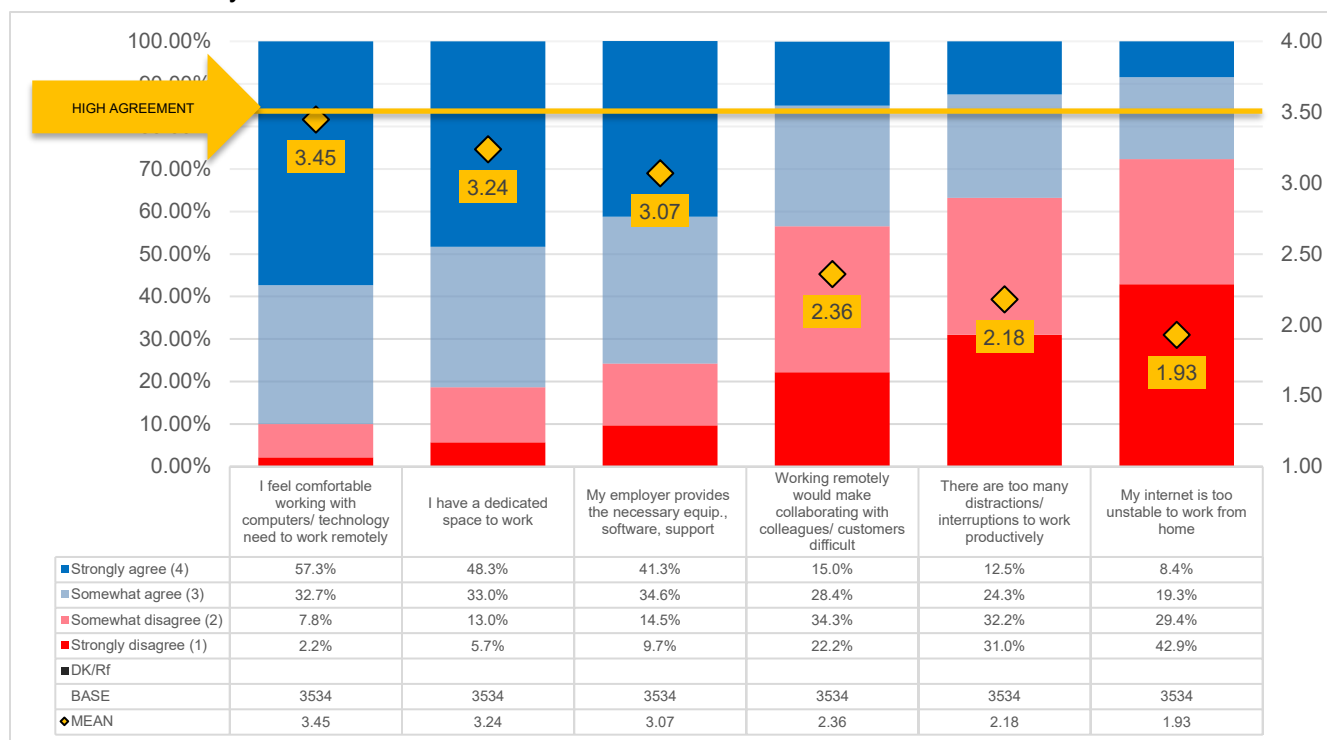
GROUP	SIGNIFICANT STATISTICAL DIFFERENCES IN MEAN SCORES
<i>Those who live on Honolulu County more strongly agree with the following</i>	<ul style="list-style-type: none"> <i>I would change jobs in order to work remotely</i>
<i>Higher mean score (agreement) from those on the Neighbor Islands</i>	<ul style="list-style-type: none"> <i>I prefer working remotely to working in my company's office</i> <i>I would be willing to work for less pay if I could work remotely</i>
<i>Hawai'i County residents gave higher mean scores (agreement)</i>	<ul style="list-style-type: none"> <i>I prefer working remotely to working in my company's office</i> <i>The type of work I do can be done remotely</i> <i>I would change jobs in order to work remotely</i> <i>I would be willing to work for less pay if I could work remotely</i>
<i>Stronger level of agreement amongst those who were working remotely at time of the survey</i>	<ul style="list-style-type: none"> <i>I prefer working remotely to working in my company's office</i> <i>The type of work I do can be done remotely</i> <i>I would change jobs in order to work remotely</i> <i>I would be willing to work for less pay if I could work remotely</i>
<i>Females give higher mean scores (agreement) than males</i>	<ul style="list-style-type: none"> <i>I prefer working remotely to working in my company's office</i> <i>I would change jobs in order to work remotely</i>
<i>Those who live with children more strongly agree with the following</i>	<ul style="list-style-type: none"> <i>I prefer working remotely to working in my company's office</i> <i>I would change jobs in order to work remotely</i> <i>I would be willing to work for less pay if I could work remotely</i>
<i>Higher levels of agreement amongst those without a college degree</i>	<ul style="list-style-type: none"> <i>I prefer working remotely to working in my company's office</i>
<i>Salary workers tend to agree more so than hourly workers</i>	<ul style="list-style-type: none"> <i>The type of work I do can be done remotely</i>
<i>Higher levels of agreement from hourly workers</i>	<ul style="list-style-type: none"> <i>I would change jobs in order to work remotely</i>
<i>Those who are self-employed give higher mean scores (agreement)</i>	<ul style="list-style-type: none"> <i>I prefer working remotely to working in my company's office</i> <i>The type of work I do can be done remotely</i> <i>I would change jobs in order to work remotely</i> <i>I would be willing to work for less pay if I could work remotely</i>
<i>Those with the longest commutes tend to agree with the following more strongly</i>	<ul style="list-style-type: none"> <i>The type of work I do can be done remotely</i> <i>I would change jobs in order to work remotely</i>
<i>Higher mean scores (agreement) from those earning in excess of \$100,000</i>	<ul style="list-style-type: none"> <i>The type of work I do can be done remotely</i> <i>I would change jobs in order to work remotely</i> <i>I would be willing to work for less pay if I could work remotely</i>
<i>Stronger agreement from part-time workers</i>	<ul style="list-style-type: none"> <i>I would change jobs in order to work remotely</i> <i>I would be willing to work for less pay if I could work remotely</i>



13. FACTORS IMPACTING ABILITY TO WORK REMOTELY

In this section of the study, research respondents who worked remotely at any point between March 2020 and the time of the survey were asked to evaluate six potential enabling/disabling conditions that could impact their ability to work in a remote environment. They were instructed to quantify their perceptions using a standard four-point rating scale as shown in the table below. In addition to the percent results, a mean (average) score was also computed. The higher the score (closer to 4.00), the stronger the level of agreement.

Figure 13.1. Evaluation of Enabling/Disabling Remote Work Conditions Among Respondents Who Have Worked Remotely at Some Point from Onset of the Pandemic



Q4. To what extent do you agree or disagree with the following about your ability to do remote work?

For those who have experience working remotely at some point since the start of the pandemic in March 2020, there is a high level of comfort with the technology needed to function in this environment (57.3% strongly agree). The availability of a dedicated workspace at home (48.3% strongly agree) and having an employer who provides them with the necessary equipment/software/support for a remote work environment (41.3% strongly agree) also appear to be prevalent conditions among this subset of respondents.

Respondents having worked remotely do not seem too concerned about potential barriers to remote work, such as difficulty collaborating with co-workers and clients (56.5% somewhat/strongly disagree),



having too many distractions (63.2% somewhat/strongly disagree), and having an unstable internet connection (72.3% somewhat/strongly agree).

SEGMENTATION RECAP

In this section, we examine the statistically significant differences in responses to the above six statements regarding potentially enabling/disabling remote work conditions, between various segments of the sample. These statistically significant differences were based on mean scores highlighted for each of the different demographic segments that are highlighted throughout the report. Those segments spotlighted in the table below were statistically higher compared to at least one other comparable segment related to that specific demographic variable being highlighted.

Table 13.1. Segmentation Summary – Evaluation of Enabling/Disabling Remote Work Conditions Among Respondents Who Have Worked Remotely at Some Point from Onset COVID-19 Pandemic

GROUP	SIGNIFICANT STATISTICAL DIFFERENCES MEAN SCORES
<i>Those who live on Honolulu County more strongly agree with the following</i>	<ul style="list-style-type: none"> <i>I feel comfortable working with computers and the technology needed to work remotely</i>
<i>Higher mean score (agreement) from those on the Neighbor Islands</i>	<ul style="list-style-type: none"> <i>My internet is too unstable to work from home</i> <i>My employer or potential employer provides the necessary equipment, software, and support to work remotely</i> <i>I have a dedicated space to work at home or elsewhere</i> <i>There are too many distractions/interruptions for me to work productively at home or elsewhere</i>
<i>Hawai'i County residents gave higher mean scores (agreement)</i>	<ul style="list-style-type: none"> <i>My internet is too unstable to work from home</i> <i>I have a dedicated space to work at home or elsewhere</i> <i>I feel comfortable working with computers and the technology needed to work remotely</i>
<i>Those on Maui County provided higher mean scores (agreement)</i>	<ul style="list-style-type: none"> <i>My internet is too unstable to work from home</i> <i>My employer or potential employer provides the necessary equipment, software, and support to work remotely</i> <i>There are too many distractions/interruptions for me to work productively at home or elsewhere</i>
<i>Business owners more strongly agree with the following</i>	<ul style="list-style-type: none"> <i>My internet is too unstable to work from home</i> <i>My employer or potential employer provides the necessary equipment, software, and support to work remotely</i> <i>I have a dedicated space to work at home or elsewhere</i>
<i>Higher mean scores (agreement) from those employed in the private sector</i>	<ul style="list-style-type: none"> <i>My internet is too unstable to work from home</i>
<i>Stronger level of agreement amongst those who were working remotely at time of the survey</i>	<ul style="list-style-type: none"> <i>My employer or potential employer provides the necessary equipment, software, and support to work remotely</i> <i>I have a dedicated space to work at home or elsewhere</i>
<i>Higher mean scores (agreement) from those who were not working remotely at time of the survey</i>	<ul style="list-style-type: none"> <i>My internet is too unstable to work from home</i> <i>There are too many distractions/interruptions for me to work productively at home or elsewhere</i> <i>Working remotely would make collaborating with colleagues and/or customers difficult</i>
<i>Stronger level of agreement from males</i>	<ul style="list-style-type: none"> <i>There are too many distractions/interruptions for me to work productively at home or elsewhere</i>



<p><i>Stronger level of agreement from males (Cont.)</i></p>	<ul style="list-style-type: none"> • <i>Working remotely would make collaborating with colleagues and/or customers difficult</i>
<p><i>Females give higher mean scores (agreement) than males</i></p>	<ul style="list-style-type: none"> • <i>I have a dedicated space to work at home or elsewhere</i> • <i>I feel comfortable working with computers and the technology needed to work remotely</i>
<p><i>Those who live with children more strongly agree with the following</i></p>	<ul style="list-style-type: none"> • <i>My internet is too unstable to work from home</i> • <i>My employer or potential employer provides the necessary equipment, software, and support to work remotely</i> • <i>There are too many distractions/interruptions for me to work productively at home or elsewhere</i> • <i>Working remotely would make collaborating with colleagues and/or customers difficult</i>
<p><i>Higher levels of agreement amongst those without a college degree</i></p>	<ul style="list-style-type: none"> • <i>My internet is too unstable to work from home</i> • <i>My employer or potential employer provides the necessary equipment, software, and support to work remotely</i> • <i>There are too many distractions/interruptions for me to work productively at home or elsewhere</i> • <i>Working remotely would make collaborating with colleagues and/or customers difficult</i> • <i>I feel comfortable working with computers and the technology needed to work remotely</i>
<p><i>College graduates were more likely to strongly agree with the following</i></p>	<ul style="list-style-type: none"> • <i>I feel comfortable working with computers and the technology needed to work remotely</i>
<p><i>Salary workers tend to agree more so than hourly workers</i></p>	<ul style="list-style-type: none"> • <i>My employer or potential employer provides the necessary equipment, software, and support to work remotely</i> • <i>I have a dedicated space to work at home or elsewhere</i>
<p><i>Those who are self-employed give higher mean scores (agreement)</i></p>	<ul style="list-style-type: none"> • <i>I have a dedicated space to work at home or elsewhere</i>
<p><i>Those with the longest commutes tend to agree with the following more strongly</i></p>	<ul style="list-style-type: none"> • <i>I have a dedicated space to work at home or elsewhere</i> • <i>I feel comfortable working with computers and the technology needed to work remotely</i>
<p><i>Strongest agreement from those with the shortest daily commutes</i></p>	<ul style="list-style-type: none"> • <i>My internet is too unstable to work from home</i> • <i>My employer or potential employer provides the necessary equipment, software, and support to work remotely</i> • <i>There are too many distractions/interruptions for me to work productively at home or elsewhere</i> • <i>Working remotely would make collaborating with colleagues and/or customers difficult</i>
<p><i>Higher mean scores (agreement) from those earning in excess of \$100,000</i></p>	<ul style="list-style-type: none"> • <i>My internet is too unstable to work from home</i> • <i>My employer or potential employer provides the necessary equipment, software, and support to work remotely</i> • <i>I have a dedicated space to work at home or elsewhere</i> • <i>There are too many distractions/interruptions for me to work productively at home or elsewhere</i> • <i>Working remotely would make collaborating with colleagues and/or customers difficult</i> • <i>I feel comfortable working with computers and the technology needed to work remotely</i>
<p><i>Those working on a full-time basis gave higher mean scores (agreement)</i></p>	<ul style="list-style-type: none"> • <i>My employer or potential employer provides the necessary equipment, software, and support to work remotely</i> • <i>I have a dedicated space to work at home or elsewhere</i> • <i>I feel comfortable working with computers and the technology needed to work remotely</i>



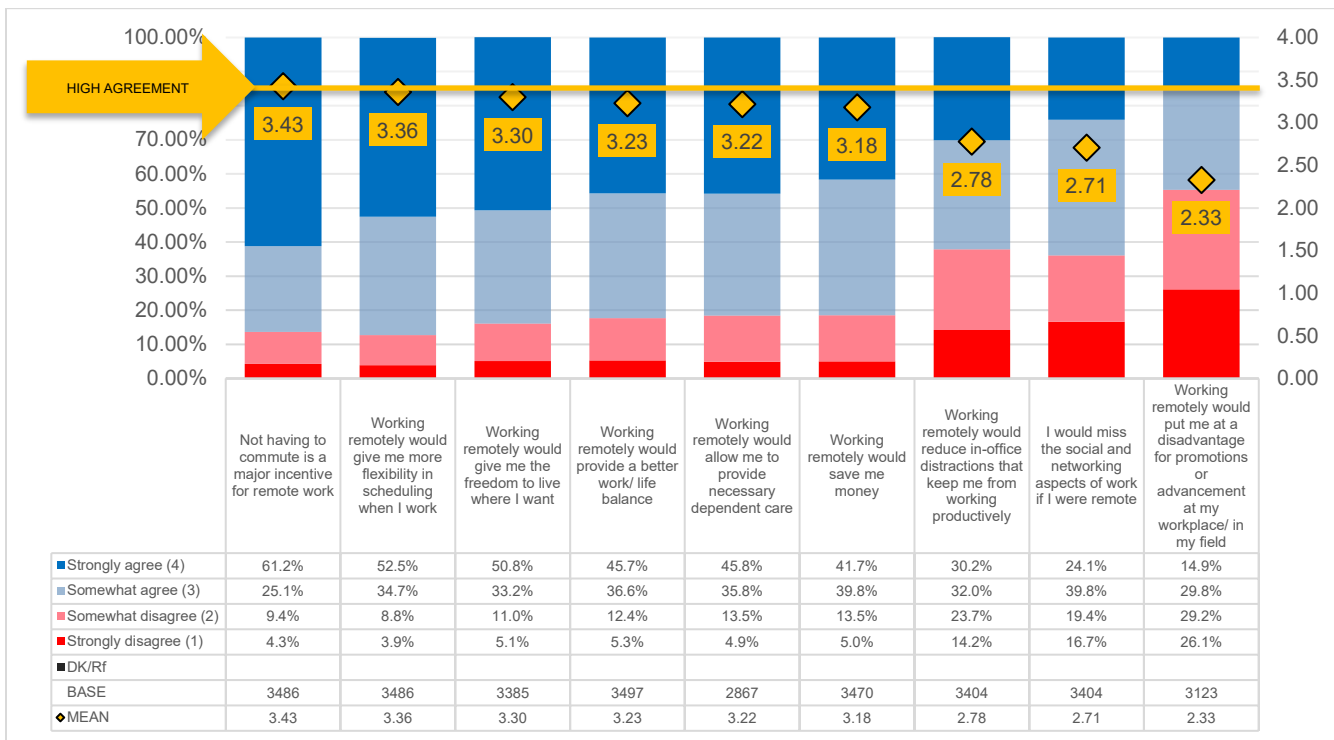
<i>Higher mean scores (agreement) from those in the private sector</i>	<ul style="list-style-type: none">• <i>There are too many distractions/interruptions for me to work productively at home or elsewhere</i>• <i>Working remotely would make collaborating with colleagues and/or customers difficult</i>
<i>Public sector workers provided higher mean scores (agreement)</i>	<ul style="list-style-type: none">• <i>I feel comfortable working with computers and the technology needed to work remotely</i>



14. PERCEIVED BENEFITS OF REMOTE WORK

In this section of the study, research respondents who worked remotely at some point between March 2020 and the time of the survey were asked to evaluate nine perceived benefits/disadvantages regarding remote work. They were instructed to quantify their perceptions using a standard four-point rating scale as shown in the table below. In addition to the percent results, a mean (average) score was also computed. The higher the score (closer to 4.00), the stronger the level of agreement.

Figure 14.1. Evaluation of Perceived Benefits/Disadvantages of Remote Work Among Respondents Who Have Worked Remotely at Some Point from Onset of the Pandemic



Q5. To what extent do you agree or disagree with the following aspects of remote work?

The three statements regarding remote work benefits/disadvantages that respondents most strongly agreed with were: *Not having to commute is a major incentive for remote work (61.2%)*, *Working remotely would give me more flexibility in scheduling when I work (52.5%)*, and *Working remotely would give me the freedom to live where I want (50.8%)*.

At the opposite end, the two tested statements that respondents disagreed with were: *I would miss the social and networking aspects of work if I were remote working (36.1% somewhat/strongly disagree)* and *Working remotely would put me at a disadvantage for promotions or advancement at my workplace/in my field (55.3% somewhat/strongly disagree)*.



SEGMENTATION RECAP

In this section, we examine the statistically significant differences in response to the above nine statements regarding perceived benefits/disadvantages to remote work, between various segments of the sample. These statistically significant differences were based on mean scores highlighted for each of the different demographic segments that are highlighted throughout the report. Those segments spotlighted in the table below were statistically higher compared to at least one other comparable segment related to that specific demographic variable being highlighted.

Table 14.1. Segmentation Summary – Evaluation of Perceived Benefits/Disadvantages of Remote Work Among Respondents Who Have Worked Remotely at Some Point from Onset of the Pandemic

GROUP	SIGNIFICANT STATISTICAL DIFFERENCES MEAN SCORES
<p>Those who live on Honolulu County more strongly agree with the following</p>	<ul style="list-style-type: none"> • Working remotely would provide a better work/life balance • Working remotely would give me more flexibility in scheduling when I work • Not having to commute is a major incentive for remote work • Working remotely would give me the freedom to live where I want • Working remotely would allow me to provide necessary dependent care • Working remotely would reduce in-office distractions that keep me from working productively • I would miss the social and networking aspects of work if I were remote working • Working remotely would save me money
<p>Higher mean score (agreement) from those on the Neighbor Islands</p>	<ul style="list-style-type: none"> • Working remotely would put me at a disadvantage for promotions or advancement at my workplace/in my field
<p>Hawai'i County residents gave higher mean scores (agreement)</p>	<ul style="list-style-type: none"> • Working remotely would provide a better work/life balance • Working remotely would give me more flexibility in scheduling when I work • Not having to commute is a major incentive for remote work • Working remotely would put me at a disadvantage for promotions or advancement at my workplace/in my field • I would miss the social and networking aspects of work if I were remote working • Working remotely would save me money
<p>Business owners more strongly agree with the following</p>	<ul style="list-style-type: none"> • I would miss the social and networking aspects of work if I were remote working
<p>Stronger level of agreement amongst those who were working remotely at time of the survey</p>	<ul style="list-style-type: none"> • Working remotely would give me more flexibility in scheduling when I work • Not having to commute is a major incentive for remote work • Working remotely would give me the freedom to live where I want • Working remotely would allow me to provide necessary dependent care • Working remotely would reduce in-office distractions that keep me from working productively • Working remotely would save me money



<p><i>Higher mean scores (agreement) from those who were not working remotely at time of the survey</i></p>	<ul style="list-style-type: none"> • <i>I would miss the social and networking aspects of work if I were remote working</i>
<p><i>Stronger level of agreement from males</i></p>	<ul style="list-style-type: none"> • <i>Working remotely would put me at a disadvantage for promotions or advancement at my workplace/in my field</i>
<p><i>Females give higher mean scores (agreement) than males</i></p>	<ul style="list-style-type: none"> • <i>Working remotely would provide a better work/life balance</i> • <i>Working remotely would give me more flexibility in scheduling when I work</i> • <i>Not having to commute is a major incentive for remote work</i> • <i>Working remotely would give me the freedom to live where I want</i> • <i>Working remotely would allow me to provide necessary dependent care</i> • <i>Working remotely would reduce in-office distractions that keep me from working productively</i> • <i>Working remotely would save me money</i>
<p><i>Those who live with children more strongly agree with the following</i></p>	<ul style="list-style-type: none"> • <i>Working remotely would put me at a disadvantage for promotions or advancement at my workplace/in my field</i>
<p><i>Stronger agreement among those living in homes without children</i></p>	<ul style="list-style-type: none"> • <i>Working remotely would save me money</i>
<p><i>Higher levels of agreement amongst those without a college degree</i></p>	<ul style="list-style-type: none"> • <i>Not having to commute is a major incentive for remote work</i> • <i>Working remotely would put me at a disadvantage for promotions or advancement at my workplace/in my field</i>
<p><i>College graduates were more likely to strongly agree with the following</i></p>	<ul style="list-style-type: none"> • <i>Working remotely would provide a better work/life balance</i> • <i>Working remotely would give me more flexibility in scheduling when I work</i> • <i>Not having to commute is a major incentive for remote work</i> • <i>Working remotely would give me the freedom to live where I want</i> • <i>Working remotely would allow me to provide necessary dependent care</i> • <i>Working remotely would reduce in-office distractions that keep me from working productively</i> • <i>I would miss the social and networking aspects of work if I were remote working</i> • <i>Working remotely would save me money</i>
<p><i>Salary workers tend to agree more so than hourly workers</i></p>	<ul style="list-style-type: none"> • <i>I would miss the social and networking aspects of work if I were remote working</i>
<p><i>Higher levels of agreement from hourly workers</i></p>	<ul style="list-style-type: none"> • <i>Not having to commute is a major incentive for remote work</i> • <i>Working remotely would reduce in-office distractions that keep me from working productively</i> • <i>Working remotely would save me money</i>
<p><i>Those who are self-employed give higher mean scores (agreement)</i></p>	<ul style="list-style-type: none"> • <i>Working remotely would provide a better work/life balance</i> • <i>Working remotely would give me more flexibility in scheduling when I work</i> • <i>Not having to commute is a major incentive for remote work</i> • <i>Working remotely would give me the freedom to live where I want</i> • <i>Working remotely would allow me to provide necessary dependent care</i> • <i>Working remotely would reduce in-office distractions that keep me from working productively</i>



<p>Those with the longest commutes tend to agree with the following more strongly</p>	<ul style="list-style-type: none"> • Working remotely would provide a better work/life balance • Working remotely would reduce in-office distractions that keep me from working productively • Not having to commute is a major incentive for remote work
<p>Strongest agreement from those with the shortest daily commutes</p>	<ul style="list-style-type: none"> • Working remotely would put me at a disadvantage for promotions or advancement at my workplace/in my field • I would miss the social and networking aspects of work if I were remote working
<p>Higher mean scores (agreement) from those earning in excess of \$100,000</p>	<ul style="list-style-type: none"> • Working remotely would give me more flexibility in scheduling when I work • Working remotely would reduce in-office distractions that keep me from working productively • Working remotely would put me at a disadvantage for promotions or advancement at my workplace/in my field • I would miss the social and networking aspects of work if I were remote working • Working remotely would save me money
<p>Higher mean scores (agreement) from those in the private sector</p>	<ul style="list-style-type: none"> • Working remotely would put me at a disadvantage for promotions or advancement at my workplace/in my field
<p>Public sector workers provided high mean scores</p>	<ul style="list-style-type: none"> • Not having to commute is a major incentive for remote work • Working remotely would reduce in-office distractions that keep me from working productively • Working remotely would save me money
<p>Those who own their primary residence more strongly agree</p>	<ul style="list-style-type: none"> • Working remotely would put me at a disadvantage for promotions or advancement at my workplace/in my field • I would miss the social and networking aspects of work if I were remote working
<p>Renters more strongly agree with the following</p>	<ul style="list-style-type: none"> • Working remotely would give me the freedom to live where I want • Working remotely would reduce in-office distractions that keep me from working productively • Working remotely would save me money



15. SUGGESTIONS TO FACILITATE REMOTE WORK

Those who have worked remotely at any point between March 2020 and the time of the survey were then asked what they felt would better facilitate remote work in the state. A list of options, highlighted in yellow in the table below, was provided, and respondents were also welcomed to provide open-ended comments which are shaded in blue.

Table 15.1. Remote Work Employee Suggestions for Facilitating Remote Work in the State

Suggestions	STATEWIDE	Honolulu County	Hawai'i County	Maui County	Kaua'i County
<i>BASE</i>	3,534	1,792	852	594	296
<i>Improve broadband infrastructure</i>	65.3%	64.9%	72.4%	62.7%	56.0%
<i>Greater awareness of best practices for offering remote work opportunities to employees</i>	47.9%	50.4%	43.9%	40.7%	41.4%
<i>Increase remote work hubs/co-working locations</i>	46.9%	41.9%	57.8%	60.1%	52.8%
<i>None of the above</i>	4.6%	5.1%	2.7%	3.5%	4.7%
<i>Greater acceptance and support for remote work</i>	1.5%	1.9%	2.7%	0.3%	1.0%
<i>Benefits of remote work</i>	0.7%	1.0%	0.3%	-	-
<i>Employer providing hardware, software, tech support</i>	0.7%	1.0%	0.2%	-	0.3%
<i>Recommendations to make remote work successful</i>	0.6%	0.7%	0.2%	-	0.2%
<i>Incentives for employees</i>	0.5%	0.7%	0.8%	-	-
<i>Other</i>	0.4%	0.4%	0.4%	0.4%	0.3%
<i>Education/training</i>	0.4%	0.2%	0.1%	1.2%	0.6%
<i>Reimbursement for utilities</i>	0.3%	0.4%	0.2%	0.1%	-
<i>Trust employees</i>	0.3%	0.3%	0.4%	-	0.9%
<i>More jobs/opportunities to work remotely</i>	0.3%	0.3%	0.2%	0.2%	-
<i>Upgrade electrical grid/ infrastructure</i>	0.3%	0.4%	0.3%	0.2%	-

Q6. What do you think would better facilitate remote work in Hawaii?

- Note:
- a. % don't add up to 100% since multiple choices were allowed
 - b. Dashes (-) indicate no data were available
 - c. Shaded cells in yellow represent set options; shaded cells in blue represent open-ended comments

Two-thirds (65.3%) of remote workers suggest improving broadband infrastructure as a means of enabling remote work in the state. Nearly half (47.9%) agree that educating all those involved about best practices on remote work would help facilitate it, while 46.9% feel that increasing remote work hubs and/or co-working locations are a step in the right direction.

The top three open-ended suggestions offered by respondents included: *Greater acceptance and support for remote work*, *Benefits of remote work*, and *Employer providing hardware, software, and tech support*.



16. POST-PANDEMIC POLICY

In this next section, research respondents were asked to select from the options listed in the table below regarding their employer's post-pandemic remote work plans.

Table 16.1. Post-Pandemic Employer Remote Work Plans Expected by Employees

Expected Plans	STATEWIDE	Honolulu County	Hawai'i County	Maui County	Kaua'i County
BASE	5,194	2,633	1,203	911	447
Yes, employer will allow full-time remote work	17.9%	14.8%	27.9%	23.2%	20.0%
Yes, employer will allow partial remote work	25.6%	24.7%	31.5%	24.5%	25.0%
SUBTOTAL – SOME REMOTE WORK	43.5%	39.5%	59.4%	47.7%	45.0%
No, employer will not allow remote work	19.7%	22.0%	11.3%	18.2%	15.2%
Work cannot be done on a remote basis	29.5%	30.4%	23.8%	29.7%	33.2%
SUBTOTAL – NO REMOTE WORK	49.2%	52.4%	35.1%	47.9%	48.4%
Don't know/Refused	7.3%	8.2%	5.5%	4.4%	6.6%
TOTAL	100%	100%	100%	100%	100%

Q14. After the pandemic is over, do you expect your employer to allow you to work remotely?

Note: a. Shaded cells in green indicate statistically significant findings relative to net findings for Neighbor Islands

Overall, 43.5% expect their employer/business to offer some form of remote work to employees after the end of the pandemic. This appears to be more likely to occur on the Neighbor Islands compared to Honolulu County.

17.9% predict their employer will allow them to work remotely on a full-time basis, while another one in four (25.6%) anticipates their employer will allow a hybrid system once the pandemic subsides.

- Those who earn higher wages in this subset of the sample appear more likely to expect their employer will offer some form of remote work after the pandemic has concluded. For example, 61.8% of those who earn above \$100,000 a year indicate working remotely either full-time or on a hybrid basis will be offered to them. This number drops to 34.4% amongst those who earn below \$50,000.
- Female respondents appear more likely to expect their employer will not offer remote work as an option post-pandemic (22.1%) compared to males (16.5%).
- Those who live with children appear more likely to expect their employer will offer some form of remote work as a future option (48.3%) compared to those who do not live with any children (39.1%).



17. RESPONDENT PROFILE – FEATURING REMOTE WORKERS

In this section of the report, we provide a profile of the respondents who took part in the study, segmented by whether or not they worked remotely at some point since the start of the pandemic and also if they were working remotely in some fashion at the time of the survey. The shaded cells highlight statistically significant differences between the different segments by row.

GENDER

The table below highlights gender segmented by whether they worked remotely at some point since the start of the pandemic and whether they were working remotely at the time of the survey. The one statistically significant difference, highlighted in blue, was the higher proportion of males who did not work remotely at any point since the start of the pandemic.

Table 17.1. Respondent Gender by Remote Work Status

GENDER	STATEWIDE	REMOTE WORKER AT ANY POINT SINCE PANDEMIC ONSET		REMOTE WORKER AT TIME OF SURVEY	
		Yes	No	Full-time/Hybrid	No
<i>BASE</i>	5,451	3,534	1,917	2,913	2,538
<i>Male</i>	42.3%	41.1%	44.1%	43.1%	41.6%
<i>Female</i>	56.5%	57.4%	55.1%	55.4%	57.5%
<i>Nonbinary</i>	0.3%	0.4%	0.2%	0.5%	0.2%
<i>Other</i>	0.0%	0.0%	-	0.0%	-
<i>Refused</i>	0.9%	1.1%	0.6%	1.1%	0.8%
TOTAL	100%	100%	100%	100%	100%

Q7. With what gender do you most identify?

Note: a. Shaded cells indicate statistically significant findings relative to the opposing response

The table below highlights the proportion who have worked remotely at any point since the onset of the pandemic segmented by gender.

Table 17.2. Respondent Remote Work Status Since Pandemic Onset by Male/Female Gender

REMOTE WORK STATUS	MALE	FEMALE
Worked remotely at any point since pandemic onset (March 2020 – survey date)	57.9%	60.6%
Did not work remotely	42.1%	39.4%
TOTAL	100%	100%

Note: a. Shaded cells indicate statistically significant findings relative to the opposing gender

Female respondents were statistically more likely to work remotely since the start of the pandemic compared to males.



INCOME

The table below highlights respondent income segmented by remote work status. The results show that those who did not work remotely at any point since the start of the pandemic, as well as those who were not working remotely at the time of survey, tended to earn less income (under \$50,000).

Table 17.3. Respondent Income Level by Remote Work Status

INCOME CLASS	STATEWIDE	REMOTE WORKER AT ANY POINT SINCE PANDEMIC ONSET		REMOTE WORKER AT TIME OF SURVEY	
		Yes	No	Full-time/ Hybrid	No
BASE	5,449	3,534	1,915	2,913	2,536
<i>Less than \$25,000</i>	13.2%	8.8%	19.7%	8.8%	17.2%
<i>\$25,000 to \$49,999</i>	27.3%	21.8%	35.4%	21.3%	32.9%
<i>\$50,000 to \$74,999</i>	24.0%	25.8%	21.2%	24.2%	23.7%
<i>\$75,000 to \$99,999</i>	15.8%	18.3%	12.1%	18.3%	13.6%
<i>\$100,000 to \$149,999</i>	11.6%	14.9%	6.7%	16.2%	7.3%
<i>\$150,000 to \$199,999</i>	4.2%	5.5%	2.2%	5.8%	2.7%
<i>\$200,000 or more</i>	3.1%	3.7%	2.2%	4.2%	2.1%
<i>Refused</i>	0.8%	1.0%	0.5%	1.1%	0.5%
TOTAL	100%	100%	100%	100%	100%

Q19. What are your annual earnings before taxes?

Note: a. Shaded cells indicate statistically significant findings relative to the opposing response

The table below highlights the proportion who have worked remotely at any point since the onset of the pandemic segmented by personal income.

Table 17.4. Respondent Remote Work Status Since Pandemic Onset by Income Level

REMOTE WORK STATUS	<\$50,000	\$50,000-\$100,000	\$100,000+
Worked remotely at any point since pandemic onset (March 2020 – survey date)	45.1%	66.2%	76.4%
Did not work remotely	54.9%	33.8%	23.6%
TOTAL	100%	100%	100%

Note: a. Shaded cells indicate statistically significant findings relative to the other income level(s)

Those who earn less income were less likely to have worked remotely at any point since the start of the pandemic.



EDUCATION

When the results are segmented by education, we find that those who worked remotely at some point since the start of the pandemic, and those who continue to do so at the time of survey, are more likely to have college and advanced degrees. Conversely, those who did not have a college degree were less likely to have worked remotely.

Table 17.5. Respondent Education Attainment by Remote Work Status

EDUCATION LEVEL	STATEWIDE	REMOTE WORKER AT ANY POINT SINCE PANDEMIC ONSET		REMOTE WORKER AT TIME OF SURVEY	
		Yes	No	Full-time/ Hybrid	No
<i>BASE</i>	5,451	3,534	1,917	2,913	2,538
<i>Less than high school</i>	0.8%	0.6%	1.1%	0.7%	0.9%
<i>High school/GED</i>	10.6%	5.3%	18.3%	5.7%	15.1%
<i>Some college/no degree</i>	19.6%	15.9%	25.2%	16.4%	22.6%
<i>Trade school</i>	8.0%	7.3%	9.0%	8.7%	7.3%
<i>Associate degree</i>	13.5%	13.4%	13.7%	13.7%	13.4%
<i>Bachelor's degree</i>	29.4%	33.7%	23.2%	32.1%	27.0%
<i>Graduate or professional degree</i>	18.0%	23.8%	9.5%	22.8%	13.6%
TOTAL	100%	100%	100%	100%	100%

Q11. What is the highest level of education you have completed?

Note: a. Shaded cells indicate statistically significant findings relative to the opposing response

The table below highlights the proportion who have worked remotely at any point since the onset of the pandemic segmented by level of education.

Table 17.6. Respondent Remote Work Status Since Pandemic Onset by Education Attainment

REMOTE WORK STATUS	BACHELOR'S/ GRADUATE DEGREE	NON-COLLEGE GRADUATE
Worked remotely at any point since pandemic onset (March 2020 – survey date)	72.2%	48.2%
Did not work remotely	27.8%	51.8%
TOTAL	100%	100%

Note: a. Shaded cells indicate statistically significant findings relative to the opposing education level

Those with a college degree were more likely to have worked remotely during the pandemic compared to those without a college degree.



PRIMARY RESIDENCE

There is a higher proportion of homeowners amongst those who have worked and/or continued to work remotely since the start of the pandemic. Conversely, there is a higher proportion of renters amongst those who have not worked remotely at any point since the start of the pandemic as well as those who were not working remotely at the time of survey.

Table 17.7. Respondent Residence Type by Remote Work Status

RESIDENCE TYPE	STATEWIDE	REMOTE WORKER AT ANY POINT SINCE PANDEMIC ONSET		REMOTE WORKER AT TIME OF SURVEY	
		Yes	No	Full-time/ Hybrid	No
<i>BASE</i>	5,451	3,534	1,917	2,913	2,538
<i>Owned</i>	64.3%	68.5%	58.0%	68.7%	60.2%
<i>Rented</i>	32.1%	28.5%	37.3%	28.9%	35.0%
<i>Live for free</i>	3.7%	3.0%	4.7%	2.5%	4.8%
TOTAL	100%	100%	100%	100%	100%

Q8. Is the home in which you currently reside owned or rented?

Note: a. Shaded cells indicate statistically significant findings relative to the opposing response

The table below highlights the proportion who have worked remotely at any point since the onset of the pandemic segmented by primary residence.

Table 17.8. Respondent Remote Work Status Since Pandemic Onset by Residence Type

REMOTE WORK STATUS	OWN	RENTER
Worked remotely at any point since pandemic onset (March 2020 – survey date)	63.5%	53.0%
Did not work remotely	36.5%	47.0%
TOTAL	100%	100%

Note: a. Shaded cells indicate statistically significant findings relative to the opposing residence status

Respondents who own their primary residence were more likely to have worked remotely at any point since the start of the pandemic than were renters.



CHILD IN HOUSEHOLD

Overall, a little less than half of respondents live in homes with at least one child under the age of 18. Those who have a child living in their household were statistically more likely to have worked remotely at any point since the start of the pandemic, as well as be a remote worker at the time of survey. At the opposite end, those who do not live with children were statistically more likely to have not worked remotely at any point since the onset of the pandemic, or been a remote worker at the time of survey.

Table 17.9. Respondent Children in Household by Remote Work Status

CHILDREN IN HOUSEHOLD	STATEWIDE	REMOTE WORKER AT ANY POINT SINCE PANDEMIC ONSET		REMOTE WORKER AT TIME OF SURVEY	
		Yes	No	Full-time/ Hybrid	No
<i>BASE</i>	5,451	3,534	1,917	2,913	2,538
<i>Yes, my own children</i>	42.6%	44.5%	39.7%	46.6%	38.9%
<i>Yes, someone else's child</i>	5.2%	5.0%	5.7%	5.1%	5.4%
<i>No children in household</i>	52.2%	50.5%	54.7%	48.3%	55.7%
TOTAL	100%	100%	100%	100%	100%

Q9. Does your household include children under the age of 18?

Note: a. Shaded cells indicate statistically significant findings relative to the opposing response

The table below highlights the proportion who have worked remotely at any point since the onset of the pandemic segmented by whether or not they live in a home with at least one child under the age of 18.

Table 17.10. Respondent Remote Work Status Since Pandemic Onset by Children in Household

REMOTE WORK STATUS	CHILD IN HOUSEHOLD	DO NOT LIVE WITH CHILDREN
Worked remotely at any point since pandemic onset (March 2020 – survey date)	61.7%	57.7%
Did not work remotely	38.3%	42.3%
TOTAL	100%	100%

Note: a. Shaded cells indicate statistically significant findings relative to the opposing children in household status

Respondents who live with at least one child under the age of 18 were more likely to have worked remotely at any point since the start of the pandemic.



HOME INTERNET ACCESS/SERVICE

Overall, a majority of those polled have high-speed internet access, with 80.0% having broadband access. 7.2% log on to the internet via satellite, while 4% rely on a cellular plan.

Table 17.11. Respondent Home Internet Access by Remote Work Status

INTERNET ACCESS	STATEWIDE	REMOTE WORKER AT ANY POINT SINCE PANDEMIC ONSET		REMOTE WORKER AT TIME OF SURVEY	
		Yes	No	Full-time/ Hybrid	No
BASE	5,451	3,534	1,917	2,913	2,538
<i>Dial-up</i>	2.8%	3.8%	1.5%	4.5%	1.3%
<i>Broadband</i>	80.0%	82.7%	76.1%	82.0%	78.1%
<i>Satellite</i>	7.2%	7.2%	7.2%	7.4%	7.0%
<i>Cellular</i>	4.0%	2.9%	5.7%	3.2%	4.8%
<i>Other</i>	2.6%	1.6%	4.1%	1.3%	3.8%
<i>No internet access</i>	0.6%	0.1%	1.3%	0.1%	1.1%
<i>Refused</i>	2.7%	1.7%	4.1%	1.5%	3.8%
TOTAL	100%	100%	100%	100%	100%

Q10. What type of internet service do you have in your home?

Note: a. Shaded cells indicate statistically significant findings relative to the opposing response

When the results are segmented by remote work status, we find that those who have worked remotely during the pandemic were more likely to access the internet via broadband or through a dial-up service.

The table below highlights the proportion who have worked remotely at any point since the onset of the pandemic segmented by home internet access.

Table 17.12. Respondent Remote Work Status Since Pandemic Onset by Home Internet Access

REMOTE WORK STATUS	DIAL-UP	BROADBAND	SATELLITE	CELLULAR	OTHER	NO INTERNET
Worked remotely at any point since pandemic onset (March 2020 – survey date)	78.9%	61.6%	59.6%	43.0%	36.5%	13.3%
Did not work remotely	21.1%	38.4%	40.4%	57.0%	63.5%	86.7%
TOTAL	100%	100%	100%	100%	100%	100%



COUNTY

Please note the data were weighted to reflect estimates of the number of workers by industry by county based on the U.S. Census Bureau’s 2019 1-year American Community Survey, Public Use Microdata Sample (PUMS) data of adults 18+.

Table 17.13. Respondent Location by Remote Work Status

COUNTY	STATEWIDE	REMOTE WORKER AT ANY POINT SINCE PANDEMIC ONSET		REMOTE WORKER AT TIME OF SURVEY	
		Yes	No	Full-time/ Hybrid	No
BASE	5,451	3,534	1,917	2,913	2,538
<i>Honolulu County</i>	69.4%	68.8%	70.4%	66.1%	72.5%
<i>Hawai'i County</i>	13.5%	15.0%	11.4%	16.9%	10.4%
<i>Maui County</i>	12.0%	11.3%	12.9%	11.6%	12.3%
<i>Kaua'i County</i>	5.1%	5.0%	5.2%	5.3%	4.8%
TOTAL	100%	100%	100%	100%	100%

QB. On which island do you reside?

Note: a. Shaded cells indicate statistically significant findings relative to the opposing response

When the results are segmented by remote workers at any point since pandemic onset, and remote workers at the time of survey, we note a higher proportion from Hawai'i County in both instances. Currently there is a higher proportion of Honolulu County respondents amongst those who currently have returned full-time to the office/workplace.

The table below highlights the proportion who have worked remotely at any point since the onset of the pandemic segmented by county.

Table 17.14. Respondent Remote Work Status Since Pandemic Onset by Location

REMOTE WORK STATUS	HONOLULU COUNTY	HAWAI'I COUNTY	MAUI COUNTY	KAUA'I COUNTY
Worked remotely at any point since pandemic onset (March 2020 – survey date)	59.0%	65.8%	56.3%	58.4%
Did not work remotely	41.0%	34.2%	43.7%	41.6%
TOTAL	100%	100%	100%	100%

Note: a. Shaded cells indicate statistically significant findings relative to the opposing counties

Respondents who live on Hawai'i Island were the most likely to have worked remotely at any point since the start of the pandemic.

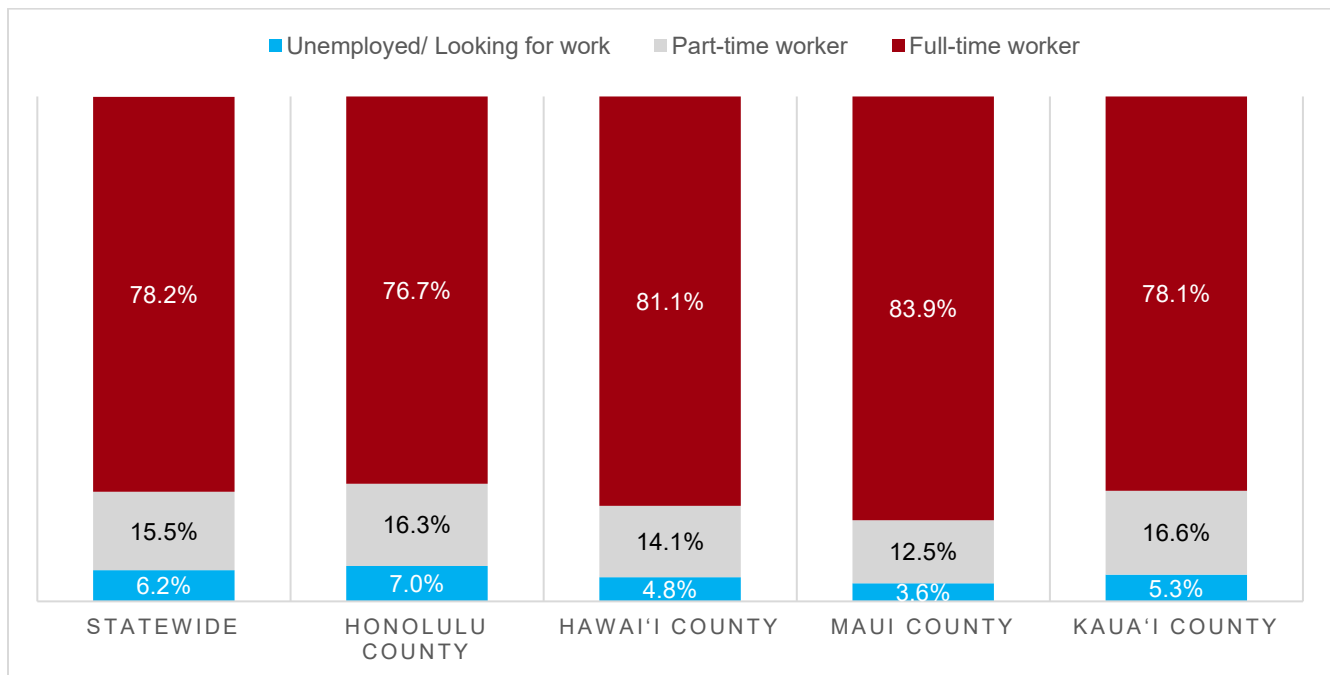


18. CURRENT EMPLOYMENT BACKGROUND/STATUS

EMPLOYMENT STATUS

At the outset of the study, each respondent was asked to identify with their current employment status.

Figure 18.1. Respondent Employment Status



Q12. What is your current employment status?

Overall, 78.2% of those polled were working at full-time positions at the time they were interviewed. 15.5% were working at part-time jobs, while 6.2% were unemployed but looking for work. Note that the screening criteria for this survey excluded retired residents, active-duty military and dependents, and those who identify as unemployed and not looking for work.

When segmented by county, we find Honolulu County had a higher proportion of part-time workers, while the Neighbor Islands had a higher proportion of full-time workers.



Next, those respondents who are working on a part-time basis as of the time of survey were asked to estimate how many hours per week they spent at their jobs.

Table 18.1. Hours Worked per Week Among Part-Time Employees

Hours Worked per Week	STATEWIDE	Honolulu County	Hawai'i County	Maui County	Kaua'i County
<i>BASE</i>	721	406	148	97	70
<i><=10 hours</i>	17.6%	19.6%	15.9%	10.1%	7.8%
<i>11-20</i>	38.3%	40.8%	29.6%	33.4%	33.8%
<i>21-30</i>	35.5%	32.4%	47.2%	43.7%	35.9%
<i>31+</i>	8.6%	7.3%	7.3%	12.8%	22.5%
<i>MEAN</i>	20.95	20.24	21.46	23.97	23.92
<i>MEDIAN</i>	20	20	22	25	24

QC1. (If currently working part-time) How many hours a week on average are you working?

Overall, the typical part-time employee reported working 20.95 hours at their job each week. When segmented by county we find those part-time workers in Maui County working the longest hours.

- When segmented by education we find statistical differences where those without a college degree work more hours at their part-time job compared to college graduates. Similarly, those who live with children and have part-time jobs work longer hours compared to part-time workers who do not live with children.

EMPLOYMENT TYPE

Next, research respondents were asked to classify their employment type/history.

Table 18.2. Respondent Employment Type by Remote Work Status

EMPLOYMENT TYPE	STATEWIDE	REMOTE WORKER AT ANY POINT SINCE PANDEMIC ONSET		REMOTE WORKER AT TIME OF SURVEY	
		Yes	No	Full-time/ Hybrid	No
<i>BASE</i>	5,194	3,424	1,770	2,822	2,372
<i>Salaried employee</i>	54.7%	65.9%	37.3%	65.0%	44.8%
<i>Hourly employee</i>	31.7%	19.2%	50.8%	17.9%	44.8%
<i>Self-employed</i>	9.4%	10.7%	7.3%	12.6%	6.4%
<i>Business owner</i>	3.3%	3.4%	3.3%	3.8%	2.9%
<i>Other</i>	0.9%	0.9%	1.2%	0.8%	1.1%
TOTAL	100%	100%	100%	100%	100%

QC. What is your current employment status?

Note: a. Shaded cells indicate statistically significant findings relative to the opposing response



Overall, half (54.7%) of those polled were salaried employees, with 31.7% being compensated on an hourly basis. Roughly one in 10 (9.4%) were self-employed, while 3.3% were business owners.

When these results are segmented by remote work status, we find that those who have worked remotely were more likely to be a salaried employee. Conversely, amongst those who have not worked remotely at any point since the start of the pandemic, there is a higher proportion of hourly workers.

OCCUPATION

Next, research respondents were asked to identify their occupation. The percent responses are highlighted in the table below.

Table 18.3. Respondent Occupation by Remote Work Status

OCCUPATION	STATEWIDE	REMOTE WORKER AT ANY POINT SINCE PANDEMIC		REMOTE WORKER AT TIME OF SURVEY	
		Yes	No	Full-time/ Hybrid	No
BASE	5,449	3,534	1,915	2,913	2,536
<i>Management</i>	18.7%	21.6%	14.3%	22.7%	15.0%
<i>Sales</i>	10.8%	9.5%	12.8%	10.2%	11.4%
<i>Office and admin support</i>	10.2%	11.9%	7.7%	11.1%	9.4%
<i>Business/Financial operations</i>	7.4%	9.4%	4.4%	9.9%	5.1%
<i>Educational instruction/Library</i>	7.1%	9.8%	3.0%	7.4%	6.8%
<i>Food prep/serving related</i>	5.7%	2.1%	10.9%	2.2%	8.9%
<i>Healthcare practitioners/tech</i>	5.0%	4.0%	6.6%	3.8%	6.2%
<i>Healthcare support</i>	3.9%	3.4%	4.6%	3.6%	4.2%
<i>Transportation and material moving</i>	3.6%	1.7%	6.5%	1.8%	5.3%
<i>Personal care and service</i>	3.4%	2.2%	5.2%	2.4%	4.2%
<i>Community and social service</i>	3.3%	4.4%	1.6%	4.6%	2.0%
<i>Computer and mathematical</i>	3.1%	4.3%	1.2%	4.5%	1.7%
<i>Arts, design, entertainment, sports, and media</i>	2.8%	3.6%	1.7%	4.1%	1.7%
<i>Construction and extraction</i>	2.1%	1.2%	3.4%	1.0%	3.1%
<i>Architecture and engineering</i>	2.1%	2.8%	1.1%	2.8%	1.4%
<i>Installation, maintenance, and repair</i>	1.9%	1.0%	3.3%	1.0%	2.8%
<i>Legal</i>	1.8%	2.6%	0.6%	2.4%	1.2%
<i>Production</i>	1.6%	1.0%	2.5%	1.0%	2.2%
<i>Building and grounds cleaning and maintenance</i>	1.6%	0.6%	2.9%	0.8%	2.3%
<i>Protective services</i>	1.5%	0.8%	2.5%	0.7%	2.2%
<i>Life, physical, social science</i>	0.9%	1.3%	0.5%	1.2%	0.7%
<i>Farming, fishing, forestry</i>	0.6%	0.4%	0.8%	0.4%	0.8%
<i>Government worker</i>	0.1%	0.1%	0.1%	0.1%	0.1%
TOTAL	100%	100%	100%	100%	100%

Q18. Please select your occupation.

Note: a. Shaded cells indicate statistically significant findings relative to the opposing response



When the results are segmented by remote workers, we find a higher proportion of white-collar occupations amongst this segment and a larger share of occupations including food service, transportation, and sales amongst those who have not worked remotely at any point since the start of the pandemic.

AVERAGE DAILY COMMUTE

In this section of the study, research respondents were asked to estimate their average daily commute to work in minutes.

Table 18.4. Respondent Average Daily Work Commute by Remote Work Status

MEASURE	STATEWIDE	REMOTE WORKER AT ANY POINT SINCE PANDEMIC ONSET		REMOTE WORKER AT TIME OF SURVEY	
		Yes	No	Full-time/ Hybrid	No
MEAN (minutes)	28.29	30.85	24.48	31.47	25.43
MEDIAN (minutes)	20	25	20	25	20

Q15. How long is your average commute to work?

Note: a. Shaded cells indicate statistically significant findings relative to the opposing response

The typical worker indicated they have an average daily commute of 28.29 minutes to work, with the median being lower at 20 minutes.

The results show that those who have or were continuing to work remotely at the time of the survey have longer daily commutes compared to those who have not worked remotely at any point since the start of the pandemic.

- Those who work in the public sector have longer daily commutes (31.15 minutes) compared to private sector employees (27.67 minutes).



19. EMPLOYER BACKGROUND

SECTOR

At the outset of the study, each respondent was asked to identify their employer type.

Table 19.1. Respondent Employer Type

Employer Type	STATEWIDE	Honolulu County	Hawai'i County	Maui County	Kaua'i County
<i>BASE</i>	5,451	2,809	1,244	936	462
<i>Private sector – For-profit</i>	61.4%	57.2%	67.5%	75.7%	69.1%
<i>Private sector – Non-profit</i>	15.1%	16.4%	13.2%	10.3%	12.6%
<i>Government – Local</i>	2.6%	2.8%	2.5%	2.0%	2.2%
<i>Government – State</i>	7.3%	9.2%	3.6%	2.0%	2.7%
<i>Government – Federal</i>	3.4%	4.5%	1.4%	1.0%	0.5%
<i>Self-employed</i>	10.2%	9.9%	11.8%	9.0%	12.9%
TOTAL	100%	100%	100%	100%	100%

Q16. Which of the following best describes your employment?

Note: a. Shaded cells in green indicate statistically significant findings relative to net findings for Neighbor Islands

Roughly two-thirds (61.4%) of the sample work in the private sector for a for-profit entity. 15.1% work for a non-profit organization with 7.3% working for the state, 2.6% comprised of county workers, and 3.4% federal employees. 10.2% identified as self-employed.

When segmented by county, we find higher proportions of state and federal workers in Honolulu County. Honolulu County also had a higher proportion of workers in the non-profit sector. The Neighbor Island counties had a larger share of private sector for-profit employees.

Table 19.2. Respondent Employer Type by Remote Work Status

EMPLOYER TYPE	STATEWIDE	REMOTE WORKER AT ANY POINT SINCE PANDEMIC ONSET		REMOTE WORKER AT TIME OF SURVEY	
		Yes	No	Full-time/ Hybrid	No
<i>BASE</i>	5,451	3,534	1,917	2,913	2,538
<i>Private sector – For-profit</i>	61.4%	57.1%	67.7%	60.1%	62.6%
<i>Private sector – Non-profit</i>	15.1%	17.4%	11.7%	16.4%	13.9%
<i>Government – Local</i>	2.6%	2.4%	3.0%	1.9%	3.3%
<i>Government – State</i>	7.3%	9.8%	3.5%	7.3%	7.3%
<i>Government – Federal</i>	3.4%	3.6%	3.3%	3.2%	3.7%
<i>Self-employed</i>	10.2%	9.7%	10.9%	11.2%	9.3%
TOTAL	100%	100%	100%	100%	100%

Q16. Which of the following best describes your employment?

Note: a. Shaded cells indicate statistically significant findings relative to the opposing response



We find a higher proportion of respondents who worked in the non-profit sector along with state workers as having worked remotely at any point since the onset of the pandemic. Conversely, amongst those who have not worked remotely, there is a larger proportion of for-profit private sector workers.

PRIMARY INDUSTRY

Last, research respondents were asked to identify the primary industry that their employer operates in. The data were weighted to reflect statewide proportions derived from the U.S. Census Bureau's 2019 1-year American Community Survey, Public Use Microdata Sample (PUMS) data of adults 18+.

Table 19.3. Primary Industry of Respondents' Employer

Primary Industry	STATEWIDE	Honolulu County	Hawai'i County	Maui County	Kaua'i County
<i>BASE</i>	5,451	2,809	1,244	936	462
<i>Agriculture, Forestry, Fishing, and Hunting</i>	1.5%	0.8%	4.2%	1.5%	2.8%
<i>Mining</i>	0.7%	0.2%	2.1%	1.4%	2.4%
<i>Utilities</i>	1.0%	1.0%	1.6%	0.5%	0.7%
<i>Construction</i>	6.9%	6.9%	5.5%	8.1%	7.2%
<i>Manufacturing</i>	2.8%	2.6%	3.2%	2.8%	3.7%
<i>Wholesale Trade</i>	2.0%	1.9%	2.1%	2.4%	2.4%
<i>Retail Trade</i>	10.9%	11.0%	10.9%	11.2%	8.1%
<i>Transportation and Warehousing</i>	4.9%	5.5%	2.8%	3.7%	5.9%
<i>Information</i>	1.2%	1.3%	1.7%	0.9%	1.0%
<i>Finance and Insurance</i>	2.8%	3.3%	1.5%	1.7%	1.5%
<i>Real Estate, Rental Leasing</i>	2.9%	2.2%	4.1%	5.1%	4.8%
<i>Professional, Scientific, and Technical Services</i>	5.1%	5.7%	3.5%	4.2%	3.8%
<i>Management of Companies and Enterprises</i>	2.1%	1.4%	4.2%	3.3%	3.6%
<i>Administrative and Support</i>	2.6%	2.4%	2.7%	3.8%	2.5%
<i>Educational Services</i>	8.0%	8.5%	8.8%	5.3%	5.5%
<i>Health Care and Social Assistance</i>	11.5%	11.8%	10.6%	11.0%	11.4%
<i>Art, Entertainment, and Recreation</i>	2.3%	1.7%	4.1%	3.0%	2.6%
<i>Accommodation</i>	4.1%	2.9%	5.1%	8.1%	7.9%
<i>Food Services</i>	8.4%	8.2%	7.7%	10.5%	7.9%
<i>Other Services</i>	4.3%	3.7%	4.7%	5.2%	7.7%
<i>Waste Management and Remediation Services</i>	0.8%	0.6%	1.6%	1.2%	1.3%
<i>Public Administration</i>	13.4%	16.5%	7.6%	5.1%	5.4%
TOTAL	100%	100%	100%	100%	100%

Q17. Please select your employer's primary industry



SECONDARY RESEARCH

REMOTE WORK IN THE UNITED STATES

The following data were collected from publicly available secondary sources to offer context for the primary research findings of the State of Hawai'i's Department of Business, Economic Development, and Tourism's (DBEDT) "Effects of the COVID-19 Pandemic on Hawai'i's Remote Work Marketplace."

The information included in this section provides a summary of the overall incidence of remote work across the United States, examines industries that have a higher likelihood of remote workers, and provides some limited opportunities for comparison with Hawai'i.

It is worth noting that while government and private research firms that were the sources of this secondary data provide reputable and reliable information on remote work across the U.S., there were few, if any, data points that offer direct comparison with the data collected in "Effects of the COVID-19 Pandemic on Hawai'i's Remote Work Marketplace." Moreover, the studies included in this secondary research summary utilized varying data collection methodologies and sampling frames that differ from the Hawai'i study. Therefore, caution should be used when examining data points that offer context for the Hawai'i findings.

UNITED STATES

- The COVID-19 pandemic has given rise to a sharp increase in the number of employees working remotely across the United States. According to a State of the Remote Workforce study, 69% of employees in the U.S. worked remotely at the height of the COVID-19 pandemic. (Lister, 2022)

- During the May-June 2020 time period, **33.3% of employed individuals** ages 16 years and older in the U.S. reported that they teleworked due to the pandemic. This number declined to 22.3% during the October-December 2020 quarter. (Bureau of Labor Statistics, 2021)
 - From May-December 2020, 22.8% of males and 29.1% of females were working remotely due to COVID-19.
 - During that same time period, 41.7% of Asian workers, 25.2% of White workers, 21.5% of Black workers and 23.3% of workers of other races were working remotely due to the pandemic.
 - Workers aged 25-54 led remote working due to COVID-19 with 28.8% of this age group in the workforce teleworking, followed by 24.8% of 55-64-year-old workers, 22.3% of workers aged 65+ and 11.9% of those aged 16-24 years old.



- According to a study conducted by Owl Labs, 73% of workers who worked remotely during COVID-19 have returned to working in an office at least one day a week, as of September 2021. (Owl Labs, 2021)

INDUSTRIES NATIONWIDE

After an extensive search, data on the incidence of remote work by NAICS codes for U.S. industries were not readily found.

However, the U.S. Bureau of Labor Statistics presents an article discussing, at length, the U.S. labor market amid the COVID-19 pandemic. According to that article, across the United States there are industries that are deemed by the Occupational Information Network (O*NET) and Occupational Employment Statistics (OES) as able to offer the option to work remotely because jobs in those industries could be performed remotely. According to an article from the U.S. Bureau of Labor Statistics, *financial activities, information, and professional and business services* are three industries with top share of employees that could work remotely. (Bureau of Labor Statistics, 2020)

Table 1. Industries Identified as Able to Offer Telework as an Option

Industry	Percent share of U.S. employed able to telework (April 2020)
<i>Financial activities</i>	81.1
<i>Information</i>	80.4
<i>Professional and business services</i>	71.6
<i>Public administration</i>	57.0
<i>Education and health services</i>	47.9
<i>Manufacturing</i>	41.0
<i>Mining, quarrying, and oil and gas extraction</i>	40.3
<i>Other services</i>	39.9
<i>Transportation and utilities</i>	32.7
<i>Wholesale and retail trade</i>	26.5
<i>Construction</i>	20.7
<i>Leisure and hospitality</i>	20.3
<i>Agriculture, forestry, fishing, and hunting</i>	8.1

(U.S. Bureau of Labor Statistics, 2020, Occupational Employment and Wage Statistics 2020)

STATES/CITIES

As mentioned previously, no single source of data on the incidence of remote work among U.S. industries by NAICS codes was found. Therefore, other sources of related data are shown below.

California, District of Columbia (D.C.), New York

- In order to examine specific U.S. industry sectors for which Hawai'i sees the highest incidence of remote workers, Public Use Microdata Areas (PUMAs) data are used.
 - The information derived from PUMAs indicates that California and the District of Columbia (D.C.) both have a “comparative advantage” in terms of the overall number of workers



employed in the *professional, scientific, and technical services* sector, over other states in the country. California also has a “comparative advantage” in the number of workers employed in the *information* sector. New York state has a “comparative advantage” in the number of workers employed over other states in the *finance and insurance* sector. Each of these states are examined below for estimated and actual incidence of remote work, when available. (Data USA)

- California
 - A November 2021 study found that 22% of Californians were working remotely, with 15% stating they worked in a hybrid capacity (remotely and outside the home or at workplace). (Baldassare, 2021)
- District of Columbia (D.C.)
 - Remote work estimates, conducted prior to the COVID-19 pandemic, indicated that 35% of commuters in the District worked remotely *at least occasionally*. At the time of the D.C. Policy Center survey (the Summer of 2021), it is estimated that among residents and commuters of the District, at least 70% are working remotely on a regular basis. (D.C. Policy Center, 2021)
- New York
 - In the state of New York, workers in the top paid sectors of management, legal, computer & mathematics and business & financial operations, can perform at least 80% of their work from home. (Partnership for New York City, 2021)
 - A Partnership for New York City (NYC) study released in March 2021, a year after pandemic-related restrictions were first implemented, stated that around 90% of Manhattan office employees work remotely due to COVID-19. (Partnership for New York City, 2021)

REACTIONS TO REMOTE WORK (NATIONWIDE)

When evaluating the success of remote work overall, a PricewaterhouseCoopers (PwC) survey conducted in January 2021 found that 83% of business executives indicated their company’s shift to remote work due to the COVID-19 pandemic was successful, while 11% reported mixed results. 71% of employees in that same survey consider the shift to be successful, where 23% saw mixed results. (PricewaterhouseCoopers, 2021)

Employers

Preference for Hybrid Work

- 70% of employers across the nation with a flexible work program in place anticipate adopting a hybrid work model that includes time in the office and remote work. (Golden, 2021)
 - 20% plan to return to office



- Many U.S. firms are considering migrating from a fully in-office policy to a hybrid approach for their employees. When asked “Which of the following statements best describes how you feel about remote work at your company?” 32% of executives relate to the statement “Going with the flow. Business performance is not suffering. We’ll likely increase the level of remote work.” (PricewaterhouseCoopers, 2021)
 - 26% of respondents responded that they “Prefer limited remote schedules but people like it, including future talent.”
- When asked, 68% of business executives believe that an employee should work from the office a minimum of three days a week, with the goal of maintaining the company culture. (PricewaterhouseCoopers, 2021)
 - Executives viewed “increasing employee productivity as the most important reason for being in the office,” followed by “providing a space to meet with clients,” and “enabling our employees to collaborate effectively.”

Investments

- Since the start of pandemic, 22% firms have reduced office space, while 21% have increased office space. (Owl Labs, 2021)
- The majority of executives (87%) say that they anticipate their real estate needs to change in the following 12 months—with some believing their office space needs to be reduced; however, 56% say they may need more office space. For those indicating an expansion of office space, they cite planned headcount expansion or reducing office density to provide more space to employees in the office. Some plan to increase collaborative hubs or add private offices and quiet spaces. (PricewaterhouseCoopers, 2021)
- Other new investments in which U.S. executives are planning to increase their investments, include: (PricewaterhouseCoopers, 2021)
 - 72% planning increased investment in tools for virtual collaboration
 - 70% planning increased investment in IT infrastructure to secure virtual connectivity
 - 64% planning increased investment in training for managers to manage a more virtual workforce
 - 57% planning increased investment in conference rooms with enhanced virtual connectivity
 - 50% planning increased investment in hoteling applications
 - 48% planning increased investment in communal space in the office
 - 45% planning increased investment in unassigned (or hoteling) seating in the office



Benefits of Remote Work

- 52% of executives cite improved employee productivity as a benefit of remote work. (PricewaterhouseCoopers, 2021)
 - Collaborating on new projects – 44% say performance is better than prior to COVID-19
 - Securing relationships with new customers – 43% say performance is better than pre-COVID-19
 - Coaching employees to succeed – 44% say performance is better than pre-COVID-19
 - Onboarding of new hires – 38% say performance is better than pre-COVID-19
 - Innovating products or services – 41% say performance is better than pre-COVID-19
- It is estimated that every employee who works remotely half the time will save businesses about \$11,000 per year. (Babu, 2022)

Employees

Preference for Remote Work

- When it comes to remote work, 55% of employees would like to see themselves working at a location other than the office at least three days a week if, or when, COVID-19 is less of a concern. (PricewaterhouseCoopers, 2021)
 - Employees with less experience tend to feel less productive working remotely and are also more likely to prefer the office setting to conduct business.
 - Lower productivity, according to remote workers, stems from challenges relating to responsibilities at home, working with colleagues and having the access to information they need.
- Remote workers, for the most part, consider the transition to working away from the office to be easy, with 87% stating they have the technology and equipment they need to do their job. They also feel they are able to meet deadlines (80%), have adequate workspace (77%), get their work done without interruptions (68%) and feel motivated to do their work (64%). (Parker, et. al., 2020)
- A study conducted by FlexJobs in March-April 2021, found variations in remote work experiences when it came to the gender of the respondent. While men (69%) and women (65%) believe that improved gender equality (specifically for women) will be a result of increased remote work policies, only 17% of women felt their professional skills suffered due to COVID-19 pandemic, as compared to 26% of men. (Pelta, 2021)
- The majority of women (60%) and men (52%) said that they would quit their job if they were not allowed to continue working remote in their current role. Even more staggering are those



indicating that remote work availability is among the most important considerations for a new job, with 80% of women and 69% of men confirming this predilection. (Pelta, 2021)

- Morning Consult has tracked employee sentiment on remote workers throughout the duration of the COVID-19 pandemic. The site, which updates on a regular basis, tracks remote worker sentiment on returning to the office, considerations for returning to work, perceptions of remote work, and feelings on potential travel for work. (Morning Consult, 2022)
 - 82% of current remote workers enjoy working remotely
 - 78% would be more likely to apply for a job that offers remote work
 - 73% say they are more productive working remotely
 - 64% of current remote workers would feel comfortable returning to the office
 - 70% of current remote workers say that they trust their employer to make the right decision about when their office can return to work
 - 61% would like to return to the office as soon as its safe
 - 59% would only be willing to return to an office when all coworkers have been vaccinated
 - 54% would consider quitting their job if their employer tried to get them to return to the office before they felt safe

Benefits of Remote Work

- Among those who had worked or still worked remotely at the time of the March-April 2021 study, both women and men agreed the top benefit of remote work was no commute, with 87% of women agreeing this was a benefit and 74% of men. (Pelta, 2021)
 - Benefits cited by respondents also included cost savings (from not eating out, savings on fuel costs, dry cleaning) with 79% of women and 70% of men agreeing to this statement. 77% of women and 66% of men say that a benefit of remote work is avoiding exposure to the COVID-19 virus. 70% of women agreed that not having to “get dressed” for work in more formal office clothes was a benefit with only 57% of men agreeing to this benefit. Both women and men, 70% and 67% respectively, agreed that time savings was a benefit of remote work.
- The average annual savings for remote workers is estimated to be \$4,000, with dry cleaning and laundering contributing \$500-\$1,500, lunches and coffee \$1,040, gas for commuting \$686 and vehicle maintenance \$767. For those working remotely only two-three days a week, it is estimated that they will save at least \$2,000 a year. (Haileyesus, 2020)



Challenges of Remote Work

- Among men and women surveyed between March and April 2021, challenges to remote work were cited as the ability to collaborate, which 39% of men say suffered due to remote work and 30% of women agreeing with the statement. (Pelta, 2021)
 - Other challenges included effective real-time communication, with 25% of men and 17% of women agreeing; managing relationships with co-workers virtually where 21% of men and 16% of women saw this challenge; and 30% of women and 22% of men citing technology troubleshooting problems as a key challenge of remote work.
- Amid the COVID-19 pandemic, 29% of fully remote workers feel burned out very often or always, as compared to just 18% fully remote employees feeling the same prior to the pandemic. (Haileyesus, 2020)

Overall Advantages / Benefits of Remote Work

- Urban centers may benefit most from the outcome of remote work eliminating the need for employees to travel in to a central office, lessening the number of commuters traveling each day. A recent McKinsey survey found that this shift of 15-20% of remote workers might impact economic factors such as transportation, gasoline and auto sales, restaurants and retail and demand for office space. (Lund, et. al., 2021)
 - The 2021 study, “Work Where You Live (WWYL),” which was sponsored by the City and County of Honolulu Department of Transportation Services and the State of Hawai‘i Office of Planning and Sustainable Development and surveyed 10,479 employees working for the State Executive Branch on O‘ahu, examined teleworking behaviors from March 2020 through March 31, 2021. When asked how often they would prefer to telework in the future, 54% of supervisors and 61.9% of non-supervisory staff responded with “one or more days per week.” (State of Hawai‘i Executive Branch, 2021)
 - For those preferring to telework, “the average number of telework days preferred was 3.7 days. Close to one-third of those who prefer to telework in the future would choose to do so four or five days per week (30.8%).” (State of Hawai‘i Executive Branch, 2021)
 - According to the same study, “if all State employees were granted their preferences concerning the number of days they would like to telework in the future, 14,945 driving trips would be saved per week. That is equivalent to 2,989 round trips per day. Based on their pre-pandemic distance and time to work, State executive employees would save almost 20,000 hours per week in traffic, most during peak hours. That would reduce single-occupancy vehicular traffic by 367,847 miles per week, or 73,569 miles per day.” (State of Hawai‘i Executive Branch, 2021)



- The use of online platforms for video and online conferencing and instant messaging has become prevalent among remote workers, with around 81% using services like Zoom or Webex and 57% using instant chat. As of October 2020, a Pew Research Center study found that there was no evidence of burnout associated with overuse of online communication platforms, commonly referred to as “Zoom fatigue.” (Parker, et. al., 2020)

Barriers to Remote Work

- While around 86% of Americans are able to access broadband internet, there remain states across the nation that rank particularly low on this scale—Mississippi (76.8% have broadband access), New Mexico (78.5%) and Arkansas (79.8%). The top three ranking states with highest percentage of broadband access—Washington (91.2%), Colorado (91%) and Utah (90.8%). (Career Cloud, 2022)
 - While access to broadband is one consideration, internet capacity for video conferencing must also be studied when determining barriers to remote work. Research has shown that around 35% of Americans either have no internet in their home or limited bandwidth to work remotely. (Wong, 2020)
- Working remotely from home can be cumbersome for many. Parents who are tasked with working remotely while their children are also at home face difficulty, with 50% of parents of children under the age of 18 experience interruptions of some type. (Parker, et. al., 2020)

Other Areas for Consideration

- According to a recent study by Moody’s Analytics, the increased incidence of remote work due to the COVID-19 pandemic has triggered a shift in sentiment towards living in large cities or urban areas. This urban migration, as it has been called, is shown in the willingness of people to live in cities, as the overall appeal of moving to an urban setting has diminished. This could result in challenges such as budgetary crises due to declining tax revenues for state and county governments. (Leer and Kamins, 2020)
- The gig economy, while existing prior to the pandemic, has also seen growth over the years since 2020. In 2020, it was estimated that almost 36% of those working are doing so through freelance, or gig work. (Center on Rural Innovation, 2021)

HAWAII IN CONTEXT

Incidence of Remote Work prior to COVID-19 Pandemic

- Prior to the pandemic, Hawai‘i’s share of remote workers was estimated to be between 4.3 and 5.5%. The incidence of remote workers in Hawai‘i was similar to California (more than 5.5% but

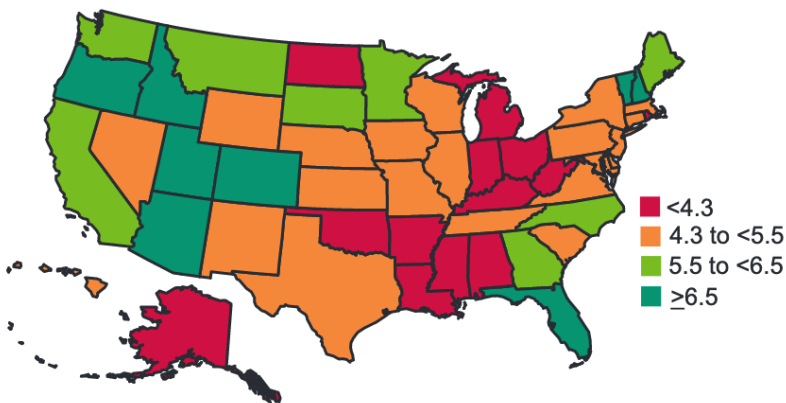


less than 6.5%), District of Columbia (D.C.) (more than 4.3% but less than 5.5%) and New York (more than 4.3% but less than 5.5%). (Leer and Kamins, 2020)

Figure 1. U.S. Remote Workers as of 2019

Chart 12: Flexibility Will Boost West

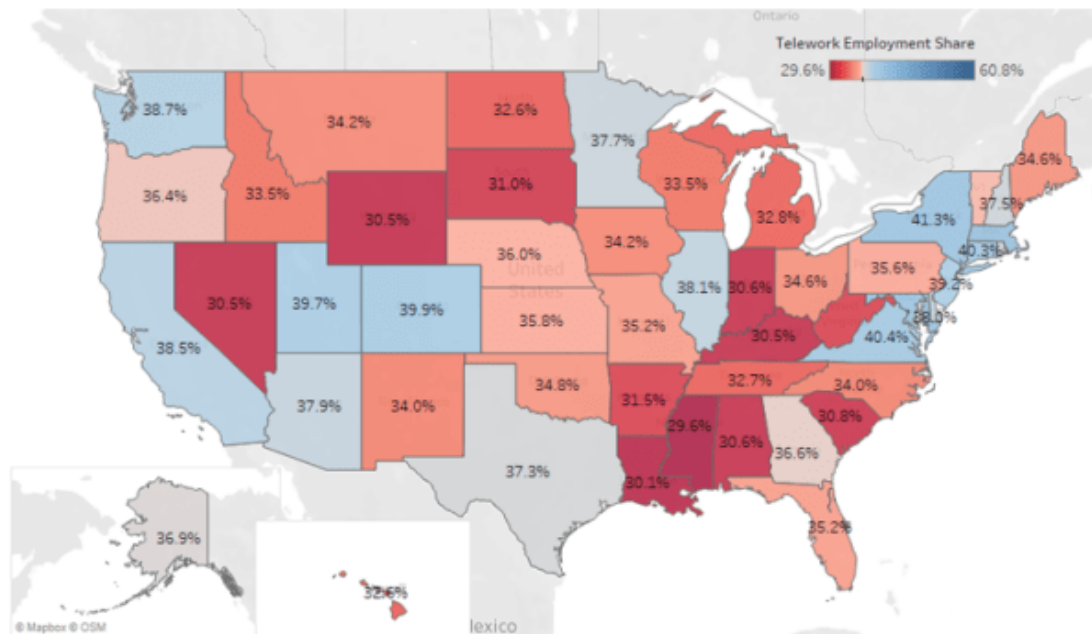
Share of workers who telecommuted, 2019, %



Sources: Census Bureau, Moody's Analytics

(Leer and Kamins, 2020)

Figure 2. Share of Jobs that Can Be Performed Remotely



Color key - More blue – higher than national average, More Red – lower than national average

Source: Dingel and Neiman (2020); May 2018 Occupational Employment and Wage Survey

(Idaho Department of Labor, 2020)



Table 2. Remote Work: Comparisons for Hawai'i/Nationwide/California, New York City, D.C.

Incidence/Industry	Hawai'i	United States	California	New York City	District of Columbia (D.C.)
<i>Incidence of Remote Work (RW) Due to COVID-19</i>	59.6%	69% U.S. employees (Lister, 2022)	22% (Nov 2021) (Baldassare, 2021)	90% of Manhattan (March 2021) (Partnership for New York City, 2021)	At least 70% are working remotely on a regular basis (among residents and commuters of the District) (D.C. Policy Center, 2021)
<i>RW Industries Professional, Scientific & Technical Services</i>	75.7%	Professional & Business Services 71.6% (Bureau of Labor Statistics, 2020)	Not available	Not available	Not available
<i>RW Industries Finance & Insurance</i>	75.5%	Financial Activities 81.1% (Bureau of Labor Statistics, 2020)	Not available	Not available	Not available
<i>RW Industries Information</i>	62.8%	Information 80.4% (Bureau of Labor Statistics, 2020)	Not available	Not available	Not available

Contextualizing Employer Findings to “Effects of the COVID-19 Pandemic on Hawai'i’s Remote Work Marketplace”

In order to contextualize the findings from the DBEDT Hawai'i Remote Work Marketplace, presented below is a side-by-side review of related datapoints found through secondary research of the United States remote workforce. While it is preferable to use directly comparable data in this approach, there were no readily available data on a national or regional basis that is directly comparable to the “Effects of the COVID-19 Pandemic on Hawai'i’s Remote Work Marketplace.” As noted earlier, the studies included in this secondary research summary utilized varying data collection methodologies and sampling frames that differ from the Hawai'i study. Therefore, caution should be used when examining data points that offer context for the Hawai'i findings.



Table 3. Remote Work: Employer Comparisons for Hawai'i/United States

Employers	Hawai'i (from findings of "Effects of the COVID-19 Pandemic on Hawai'i's Workforce")	United States
<i>Real Estate Needs</i>	24.2% of firms that offer remote work anticipate a reduction in office space, adapting to the future remote work environment	87% expect real estate needs to change in some way 56% may need more office space (PricewaterhouseCoopers, 2021) Since start of pandemic, 22% firms have reduced office space/21% increased office space (Owl Labs, 2021)
<i>Financial Investments to enable RW due to COVID-19</i>	51.2% of firms in the state have made financial investments Statewide: 89.3% purchased hardware for employees' use out of the office 82.2% implemented new communication/collaboration software 60.9% increased network security measures 52.3% digitized operations that were previously paper-based 48.5% held virtual events to maintain/boost employee engagement 34.5% offered remote work training for employees	72% tools for virtual collaboration 70% IT infrastructure to secure virtual connectivity 64% training for managers to manage a more virtual workforce 57% conference rooms with enhanced virtual connectivity 50% hoteling applications 48% communal space in the office 45% unassigned (or hoteling) seating in the office (PricewaterhouseCoopers, 2021)
<i>Evaluation of RW as Compared to Office</i>	49.8% similar/same experience 30.5% somewhat or much better experience 19.7% somewhat or much worse experience	83% consider a successful shift to remote work 11% mixed results (PricewaterhouseCoopers, 2021)
<i>Future Plans for RW</i>	51% of Hawai'i firms that offered remote work as an option between March 2020 and August 31, 2021, expect to offer remote work in the future, in some form or another	70% of employers across the nation with flexible work program in place plan anticipate adopting a hybrid work model 20% plan to return to office (Golden, 2021)
<i>Perceived Benefits of RW to Employees</i>	Statewide: 66% feel increased employee satisfaction is a benefit of offering remote work 45.6% cite increased individual productivity 44.5% reduced operational costs	52% of executives cite improved employee productivity Collaborating on new projects – 44% say performance is better than pre-COVID-10 Securing relationships with new customers– 43% say performance is better than pre-COVID-10



<i>Perceived Benefits of RW to Employees (cont.)</i>	<p>36.3% remote work as an incentive to recruit and retain talent</p> <p>21.5% access to a larger off-island talent pool</p>	<p>Coaching employees to succeed– 44% say performance is better than pre-COVID-10</p> <p>Onboarding of new hires– 38% say performance is better than pre-COVID-10</p> <p>Innovating products or services– 41% say performance is better than pre-COVID-19 (PricewaterhouseCoopers, 2021)</p>
<i>Concerns</i>	<p>61.1% difficulty in collaboration & teamwork</p> <p>59.5% difficulty in monitoring & supervising work</p> <p>55.9% maintaining security & compliance</p> <p>55% technical challenges due to internet</p> <p>53.5% maintaining company culture</p>	<p>Executives cite the importance of:</p> <p>Increasing employee productivity (as a reason for being in the office)</p> <p>Providing space to meet with clients</p> <p>Enabling employees to collaborate effectively (PricewaterhouseCoopers, 2021)</p>

Comparing Employee Findings

As stated in the previous employer findings table, the following employee data is presented to contextualize the findings from the DBEDT Hawai'i Remote Marketplace study with related datapoints found through secondary research of the United States remote workforce. It is important to recognize that the secondary research cited below may have employed different methodologies and sample population compositions than that of the primary research conducted in Hawai'i. Therefore, caution should be used when examining data points that offer context for the Hawai'i findings.

Table 4. Remote Work: Employee Comparisons for Hawai'i / United States

Employees	Hawai'i	United States
<i>Experience with RW</i>	<p>90.9% either very or somewhat satisfied with the experience of working remotely</p>	<p>55% of employees would like to work remotely at least three days per week (PricewaterhouseCoopers, 2021)</p>
<i>Ability to RW</i>	<p>90% strongly or somewhat agree they have a high level of comfort with the technology</p> <p>81.3% strongly or somewhat agree they have dedicated workspace at home</p> <p>75.9% strongly or somewhat agree they have necessary tools to succeed</p>	<p>87% feel they have the technology/equipment they need</p> <p>80% able to meet deadlines</p> <p>77% have adequate workspace</p> <p>68% can get work done without interruptions</p> <p>64% feel motivated to do their work (Parker, et. al., 2020)</p>
<i>Benefits of RW</i>	<p>86.3% strongly or somewhat agree not having a commute</p> <p>87.2% strongly or somewhat agree that it provides flexibility</p>	<p>No commute, with 87% of women agreeing this was a benefit and 74% of men.</p>



<p><i>Benefits of RW (Cont.)</i></p>	<p>84% strongly or somewhat agree that it provides the freedom to live where I want</p> <p>82.3% strongly or somewhat agree that it provides a better work/life balance</p> <p>81.6% strongly or somewhat agree that it allows me to provide the necessary dependent care</p> <p>81.5% strongly or somewhat agree that it would save me money</p>	<p>Included cost savings (from not eating out, no gas, dry cleaning) with 79% of women and 70% of men agreeing to this statement.</p> <p>Avoiding exposure to the COVID-19 virus with 77% of women and 66% of men citing this benefit as a result of remote work.</p> <p>70% of women agreed that not having to “get dressed” for work in more formal office clothes was a benefit with only 57% of men agreeing to this benefit.</p> <p>70% of women and 67% of men agreed that time savings was a benefit of remote work. (Pelta, 2021)</p>
<p><i>Barriers to RW</i></p>	<p>43.4% strongly or somewhat agree working remotely would make collaborating difficult</p> <p>36.8% strongly or somewhat agree that there are too many interruptions to work productively</p> <p>27.7% strongly or somewhat agree their internet is too unstable to work from home</p>	<p>35% of Americans either have no internet at home or limited bandwidth to work remotely (Wong, 2020)</p> <p>50% of parents with children under the age of 18 experience interruptions of some type (Parker, et. al., 2020)</p>

LEGISLATION/POLICIES RELATED TO REMOTE WORK

- California, Idaho, Mississippi, Virginia, Vermont and Washington enacted legislation to expand public sector telework opportunities for those covered under the Americans with Disabilities Act (ADA). The flexibility of telework decreases the need to commute to a central office space, which can be an important factor in considering work opportunities for those with disabilities and to help them succeed in their careers. (Draeger, 2021)
 - Accommodations include working from home, job duty restructuring (changes/adjustments to job responsibilities), re-assignment (different tasks or job duty), personal protective equipment, other accommodations. (Disability Rights California, 2020)
 - 37 states and Puerto Rico have enacted legislation to expand broadband in rural and underserved areas. (Draeger, 2021)

- Maine, New Jersey, Tennessee, Utah and Washington expanded telework to state employees. (Draiger, 2021)

- California
 - Telework Flexibility Act (Assembly Bill No. 1028) provides flexibility for employers and employees in the form of workweek adjustments from 8 hours per day and 40 hours per



week and paid overtime to employee autonomy for creating their own work schedule. (Her Lawyer, 2021)

- District of Columbia (D.C.)
 - District of Columbia Human Rights Act (DCHRA) prohibits discrimination against employees who work remotely from home and are located out of D.C., when their employer is located in D.C. (Westerman, 2021)

- New York
 - New York State Assembly passed a bill to allow state employees to work remotely as a permanent option, when possible, for these employees. (Costello, 2022)

CONSIDERATIONS FOR BEST PLACES FOR REMOTE WORK

- CNBC's Top States for Business list for 10 best states for remote work include the following categories: (Cohn, 2021)
 - Broadband access
 - Home price appreciation
 - Effective tax rate
 - Electrical grid reliability
 - Health and health care
 - Sustainability in the face of climate change
 - Environmental quality
 - Inclusiveness
 - Cost of living

- Taxes can be an important factor when a firm is considering offering the option of remote work to any employee located out-of-state. As remote work has significantly increased due to the COVID-19 pandemic, there are businesses still working out the specifics of the state income tax implications for which they are now responsible. According to the Society for Human Resource Management (SHRM), "state income taxes on wages...is generally imposed by both an employee's state of residence and any other state which the employee may work, even if the employer has no physical presence in the work state. States are taking the position that mere payment of any wages to an employee for work in the state is sufficient to trigger employer registration and withholding requirements." (Society for Human Resources Management)
 - According to Fidelity.com, a site often used for financial advice by consumers, relocating for remote work isn't a topic to be taken lightly when considering state income tax rates. A 2021 article helps individuals to better understand individual income tax rates when looking to move states in pursuit of or for remote work. As shown in the image below,

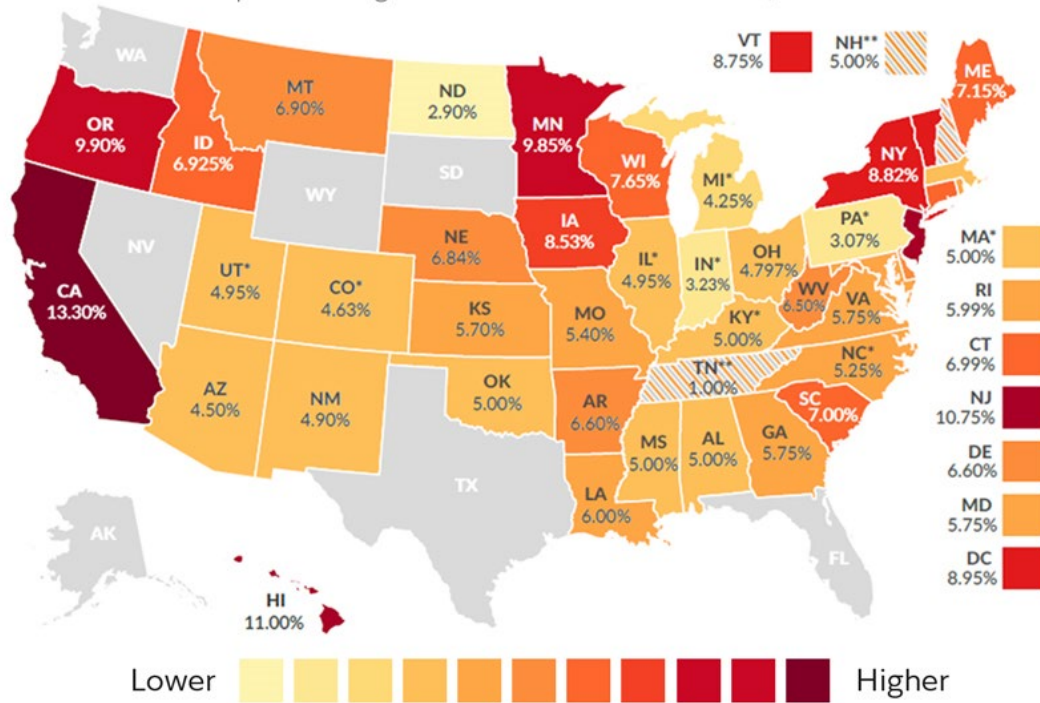


Hawaii's individual tax rate can be as high as 11%, depending on tax brackets. (Fidelity, 2021)

Figure 3. Individual Income Tax Rates by U.S. State

How high are individual income tax rates in your state?

Top state marginal individual income tax rates, 2020



(Fidelity, 2021)



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APPENDIX

EMPLOYER SURVEY: QUESTIONNAIRE

Thank you for participating in the Hawaii Remote Work survey. This survey is designed to measure the current application of and long-term plans for remote work/work-from-home policies among Hawaii's businesses.

Your responses will be kept strictly confidential. Only aggregated statistics will be reported.

For the purpose of this survey, employees are considered to be working remotely if they are working from a location other than the company's workplace or worksite. Remote work can include both those working from home and those working in a public space (i.e., co-working spaces, coffee shops, etc.).

This survey should be completed by an individual within your company with knowledge of the company's remote work practices and policies.

For each question, please select the response choice that most closely matches your answer. Some questions provide space for written comments.

For questions about this survey, please contact Anthology Research at Surveys@Anthologygroup.com.

A. To confirm, are you a person with knowledge of your company's remote work practices and policies?

1. Yes
2. No

B. What is the zip code of your company's business address in Hawaii? _____
(USE ZIPISLAND)

1. Please select your company's primary industry.

1. Agriculture, Forestry, Fishing and Hunting
2. Mining
3. Utilities
4. Construction
5. Manufacturing
6. Wholesale Trade
7. Retail Trade (incl. visitor industry)
8. Transportation and Warehousing (incl. visitor industry)
9. Information
10. Finance and Insurance
11. Real Estate Rental Leasing
12. Professional, Scientific, and Technical Services
13. Management of Companies and Enterprises
14. Administrative and Support (incl. travel agency and tour operators)
15. Educational Services
16. Health Care and Social Assistance
17. Art, Entertainment, and Recreation (incl. visitor industry)
18. Accommodation (incl. visitor industry)



- 19. Food Services (incl. visitor industry)
- 20. Other Services
- 21. Other industry (specify type of business:) _____
- 22. Waste Management and Remediation Services

99. Don't know/refused

2. How many employees did your company have as of August 31, 2021?

- 1 Number of full-time employees: _____
- 2 Number of part-time employees: _____

3. Where is the main office of your company located?

- 1. Honolulu County
- 2. Hawaii County
- 3. Maui County
- 4. Kauai County
- 5. In another US state
- 6. In another country or US territory

99. Don't know/refused

4. What is your position in this company?

- 1. Owner or Executive
- 2. HR Manager
- 3. Other Manager
- 4. Other position (specify) _____

5. Has your company offered remote work as an option for some or all of your employees?

- 1. Yes, as a long-term policy that started before the outbreak of COVID-19 (e.g., prior to March 2020)
- 2. Yes, for the first time due to the COVID-19 pandemic (e.g., beginning in March 2020)
- 3. No, did not offer remote work but the work could be done remotely (**GO TO Q13**)
- 4. No, did not offer remote work because the work cannot be done remotely. (**GO TO Q5a**)

99. Don't know/refused

5a. Why can't the work be done remotely? (**GO TO Q14**)

Q5a. CODELIST

- 1 Restaurant/Bar
- 2 Construction work
- 3 Need to be there in person
- 4 See patients for medical work
- 5 Work in retail
- 6 Operated equipment/machinery
- 7 Deal with visitors
- 8 Automotive work



- 9 Occupation type will not allow remote work (Misc.)
- 10 Ocean activities
- 11 Childcare service
- 12 Maintenance work
- 13 Agriculture/Farm work
- 14 Work in Visitor industry
- 15 Remote work/not offered/not allowed
- 96 We choose to work in the office
- 97 Don't need remote workers
- 98 Other
- 99 Don't know/refused

6. How many of your employees worked remotely as of August 31, 2021?

- 1 In Hawaii State: _____
- 2 Out-of-state: _____

7. Has your company made any financial investments to enable remote work for your employees?

- 1. Yes (**GO TO QUESTION 8**)
- 2. No (**SKIP TO QUESTION 9**)
- 99. **Don't know/refused**

8. **[IF YES TO Q7]** Which of the following has your company done to enable remote work for your employees? (**Select all that apply**)

- 1. Digitized operations that were previously paper-based
- 2. Purchased hardware for employees' use out of the office (e.g., laptops, monitors, desks, etc.)
- 3. Implemented new communication/collaboration software (e.g., Zoom, Microsoft Teams, WebEx, Slack, etc.)
- 4. Offered remote work training for employees
- 5. Increased network security measures (e.g., VPN)
- 6. Held virtual events to maintain/boost employee engagement
- 7. Other (specify) _____
- 8. **Offered stipend to offset employee purchases/for out of the office use/travel**
- 99. **Don't know/refused**

9. Overall, how would you evaluate your company's remote work experience compared to working from an office?

		Much	Somewhat	About the	Somewhat	Much	Don't
	know	Better	Better	Same	Worse	Worse	N/A
1	Individual work productivity	1	2	3	4	5	99
2	Collaboration of work	1	2	3	4	5	99
3	Management of work	1	2	3	4	5	99
4	Employee satisfaction	1	2	3	4	5	99
5	Customer/client service	1	2	3	4	5	99
6	Overall evaluation	1	2	3	4	5	99



10. Which one of the following best describes your company's plan for post-pandemic work for employees whose work can be done remotely?

- 1. Remote work for all work-days will be allowed
- 2. Remote work for some work-days per week will be allowed.
- 3. All employees have returned or will return to office once the pandemic is over, but our company plans to offer remote work options in the near future.
- 4. We have not yet made a decision about future remote work
- 5. Remote work will not be allowed when the pandemic is over **(GO TO Q13)**
- 99. **Don't know/refused**

11. What benefits are you currently achieving, or do you hope to achieve, by offering remote work to your employees post-pandemic? **(Select all that apply)**

- 1. Increased employee satisfaction
- 2. Increased individual productivity
- 3. Reduced operational costs
- 4. Access to a larger off-island talent pool **(GO TO 11a)**
- 5. Incentive to recruit and retain talent
- 6. Other reasons (specify) _____
- 7. Flexibility
- 8. Convenient
- 9. Safer
- 10. Less commute/driving time
- 11. Better for the environment
- 12. No remote work
- 98. None of the above
- 99. Don't know/refused

11a. **[IF #4 IN Q11 IS SELECTED]** What type of talent are you looking to find? **(OPEN END)**

Q11a CODELIST

- 1 Accountant/Finance/Bookkeeper/Insurance
- 2 Administrative
- 3 Technical/Technology support
- 4 Architect/Draftsman
- 5 Engineers/Scientists
- 6 Medical field
- 7 Client/Customer service
- 8 Legal
- 9 Managers
- 10 Hospitality/Travel
- 11 Real Estate
- 12 Sales/Marketing
- 13 Teachers/Instructors/Education
- 14 Advertising



- 15 Consultants
- 16 Foreign language instructors
- 17 Dedicated/Hardworking/Dependable/Team Player
- 18 Agriculture/Food
- 19 Automotive
- 20 Clerical
- 21 Counselors
- 22 Health and Fitness
- 97 None/Not Looking
- 98 Other
- 99 Don't know/refused

12. Do you expect your company will make changes to its office space if it adopts or extends remote work?
- 1. Yes, I expect our company to reduce its office space accordingly.
 - 2. No, I expect our company to maintain its current office space.
 - 99. Don't know/refused

13. What concerns, if any, does your company have in deciding to offer remote work?

	No concern	Some concern	Big concern	concern
<u>N/A</u>				
1 Difficulty in collaboration and teamwork	1	2	3	4
2 Difficulty in monitoring and supervising work	1	2	3	4
3 Difficulty in maintaining company culture	1	2	3	4
4 Negative impacts on company's long-term productivity	1	2	3	4
5 Technical challenges due to unreliable internet connectivity	1	2	3	4
6 Maintaining security and compliance for remote workers	1	2	3	4
7 Additional costs incurred to support remote work	1	2	3	4
8 Utilizing existing office space owned or leased by the company	1	2	3	4
9 Utilizing workspace upgrades (e.g., equipment and technology) that the company already made assuming working fully from the office	1	2	3	4

14. What do you think would better facilitate remote work in Hawaii? *(Select all that apply)*

- 1. Improve broadband infrastructure
- 2. Increase remote work hubs/co-working locations
- 3. Greater awareness of best practices for offering remote work opportunities to employees
- 4. Other *(specify)* _____
- 5. None of the above
- 6. Remote work not offered
- 7. Doesn't agree totally with remote work
- 8. Trust of employees
- 9. Depends
- 10. Benefits of remote work
- 11. Diversified economy
- 12. Education/Training
- 13. Low-cost/free requirements needed for remote work
- 14. Incentives
- 15. Security issues



-
16. Employees need certain qualifications for remote work
 17. Clear communication about guidelines and policies for remote work
 18. Higher pay/competitive salaries
 19. Accessibility to internet/technology/hardware/software
 20. Acceptance and support for remote work as an option
 21. Recommendations to make remote work successful
 22. Government-related
 23. Benefits of remote work
 24. Prefers to deal with in-person
 - 97 Does not apply
 - 99 Don't know/refused

Those are all the questions we have, thank you for participating in our survey!



EMPLOYEE SURVEY: QUESTIONNAIRE

Thank you for participating in the Hawaii Remote Work survey. This survey is designed to measure the current use of remote work/work-from-home among Hawaii's employees and to gauge interest in long-term policies for remote work in Hawaii's workplaces.

Your responses will be kept strictly confidential. Only aggregated statistics will be reported.

For the purpose of this survey, employees are considered to be working remotely if they are working from a location other than the company's workplace. Remote work can include both those working from home and those working in a public space (i.e., co-working spaces, coffee shops, etc.).

For each question, please select the response choice that most closely matches your answer. Some questions provide space for written comments.

For questions about this survey, please contact [Survey administrator] at [phone number] or [email address].

A. Are you a fulltime resident of Hawaii?

- 1 Yes
- 2 No (**TERMINATE**)

BX. On what island do you reside?

- 1 Oahu
- 2 Hawaii Island
- 3 Maui County
- 4 Kauai
- 9 Prefer not to answer (**TERMINATE**)

CHECK QUOTAS AND CONTINUE IF NEEDED

C. What is your current employment status?

1. I am currently working full time
2. I am currently working part time
3. I am currently unemployed but looking for work
6. I am retired and not planning to return to the workforce (**TERMINATE**)
4. I am not currently working or looking for work (**TERMINATE**)
5. I am currently active duty military (**TERMINATE**)

C_1. (**IF CURRENTLY WORKING PART TIME**) How many hours a week on average are you working?
____ hours/week on average

1. Did you work remotely/from home at any point during the COVID-19 pandemic (since March 2020)?
 1. Yes
 2. No (**GO TO Q7**)



1a. Did you start working remotely at the direction of your employer, due to a workplace response to COVID-19?

1. Yes
2. No

1b. In which setting are you currently working?

1. Remotely only (i.e., anywhere other than a company office)
2. In an office only (**GO TO Q2**)
3. Hybrid/Combination of remote and in office

1c. (**ASK IF COMBINATION IN Q1b**) How many days (partial or full) a week are you currently working remotely or in an office?

1. Remotely # of days per week _____
2. In an office # of days per week _____

1d. (**IF REMOTE ONLY IN Q1b**) At any point since the start of the pandemic, did you temporarily return to working in an office?

1. Yes
2. No

2. (**IF YES TO QUESTION 1**) How satisfied were/are you with working remotely?

1. Very satisfied
2. Somewhat satisfied
3. Somewhat dissatisfied
4. Very dissatisfied

3. How much do you agree or disagree with the following statements about remote work?

	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree
1 I prefer working remotely to working in my company's office	1	2	3	4
2 The type of work I do can be done Remotely	1	2	3	4
3 I would change jobs in order to work remotely	1	2	3	4
4 I would be willing to work for less pay if I could work remotely	1	2	3	4

4. To what extent do you agree or disagree with the following about your ability to do remote work?

	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree
1 My Internet is too unstable to work from home	1	2	3	4
2 My employer or potential employer provides the necessary equipment, software and support to work remotely	1	2	3	4
3 I have a dedicated space to work at home or elsewhere	1	2	3	4
4 There are too many distractions/interruptions for me to work productively at home or elsewhere	1	2	3	4



5	Working remotely would make collaborating with colleagues and/or customers very difficult	1	2	3	4
6	I feel comfortable working with computers and the technology needed to work remotely	1	2	3	4

5. To what extent do you agree or disagree with the following aspects of remote work? (ROTATE)

		Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree	Not Applicable
1	Working remotely would provide better a work/life balance	1	2	3	4	9
2	Working remotely would give me more flexibility in scheduling when I work	1	2	3	4	9
3	Not having to commute is a major incentive for remote work	1	2	3	4	9
4	Working remotely would give me the freedom to live where I want	1	2	3	4	9
5	Working remotely would allow me to provide necessary dependent care	1	2	3	4	9
6	Working remotely would reduce in-office that keep me from working productively	1	2	3	4	9
7	Working remotely would put me at a disadvantage for promotions or advancement at my workplace/in my field	1	2	3	4	9
8	I would miss the social and networking aspects of work if I were remote	1	2	3	4	9
9	Working remotely would save me money	1	2	3	4	9

6. What do you think would better facilitate remote work in Hawaii? (*Select all that apply*)

1. Improve broadband infrastructure
2. Increase remote work hubs/co-working locations
3. Greater awareness of best practices for offering remote work opportunities to employees
4. Other (*specify*) _____
5. None of the above
- 6. Employer providing hardware/software/technical support/broadband**
- 7. Acceptance and support for remote work as an option**
- 8. Reimbursements for utilities (electricity/phone/water)**
- 9. Incentives for employees**
- 10. Incentives for employers**
- 11. Incentives (general)**
- 12. Education/Training**
- 13. Benefits of remote work**
- 14. Trust of employees**
- 15. Flexible hours/work schedules**
- 16. Can't do/Is against work from home**
- 17. Lower cost of living/housing**
- 18. More jobs/opportunities for work from home**
- 19. Higher pay/competitive salaries**
- 20. Clear communication about guidelines and policies for remote work**
- 21. Diversified economy**
- 22. Upgrade electrical grid/systems/infrastructure/technology**



23. Less government restrictions

24. Recommendations to make remote work successful

99. Don't Know/Refused

And now, a few last questions for classification purposes...

7. With what gender do you most identify?
 1. Male
 2. Female
 3. Nonbinary
 4. Other _____
 99. Prefer not to say

8. Is the home in which you currently reside owned or rented?
 1. Owned by you or someone in the household
 2. Rented
 3. Live rent free

9. Does your household include children under the age of 18?
 1. Yes, my own minor children live in this household
 2. Yes, someone else's minor children live in this household
 3. No children under 18 living in this household

10. What type of Internet service do you have in your home?
 1. Dial-up Internet only
 2. Broadband such as cable, fiber optic, or DSL
 3. Satellite Internet service
 4. Cellular data plan only
 5. Other Internet service
 6. No Internet access
 99. Don't know/Not sure

11. What is the highest level of education you have completed?
 1. Less than high school
 2. High school/GED
 3. Some college, no degree
 4. Trade school
 5. Associate degree
 6. Bachelor's degree
 7. Graduate or professional degree

12. What is your current employment status?
 1. Salaried employee
 2. Hourly employee
 3. Self-employed worker
 4. Business owner with employees
 5. Other (specify:) _____
 - 6. Unemployed/retired**



7. Undetermined employed status (gig work/commission)

13. Where is your employer located? (If self-employed or business owner with employees, Q13 will show "Where is your business located?")

1. In Hawaii, on the same island on which I reside
2. In Hawaii, on a different island than I reside
3. In another US state (specify _____)
4. In another country or territory

Q13_3 CODE LIST

- 1 Alaska
- 2 Arizona
- 3 Arkansas
- 4 California
- 5 Colorado
- 6 Connecticut
- 7 Delaware
- 8 Florida
- 9 Georgia
- 10 Idaho
- 11 Illinois
- 12 Indiana
- 13 Louisiana
- 14 Maine
- 15 Maryland
- 16 Massachusetts
- 17 Minnesota
- 18 Mississippi
- 19 Missouri
- 20 New Jersey
- 21 North Carolina
- 22 Nevada
- 23 New Mexico
- 24 New York
- 25 Wisconsin
- 26 Iowa
- 27 Ohio
- 28 Oregon
- 29 Pennsylvania
- 30 Tennessee
- 31 Texas
- 32 Washington
- 33 Utah
- 34 Virginia
- 35 Washington, DC
- 36 Hawaii
- 37 Nationwide (unspecified)
- 38 Worldwide/Global



99 Other/unemployed/don't know

14. After the pandemic is over, do you expect your employer to allow you to work remotely? (If self-employed or business owner with employees, Q14 will show "After the pandemic is over, do you expect to work remotely?")
1. Yes, work fully remote
 2. Yes, work partially remote
 3. No, do not expect my employer to allow it
 4. No, my work can not be done remotely
 99. Don't know/Not sure
15. How long is your average commute to work? (If you work remotely, how long would you estimate a commute to your place of employment would take?)
1. _____ minutes
 2. Do not/could not commute; no central workplace or commute is not possible
16. Which of the following best describes your employment?
1. Private sector employee, for-profit company or organization
 2. Private sector employee, non-profit organization
 3. Government employee, local government
 4. Government employee, state government
 5. Government employee, federal government, civilian
 6. Self-employed in own non-incorporated business
17. **(IF NON-GOVERNMENT EMPLOYMENT)** Please select your employer's primary industry. (If self employed or business owner, Q17 will show: "Please select your primary industry")
1. Agriculture, Forestry, Fishing and Hunting
 2. Mining
 3. Utilities
 4. Construction
 5. Manufacturing
 6. Wholesale Trade
 7. Retail Trade (incl. visitor industry)
 8. Transportation and Warehousing (incl. visitor industry)
 9. Information
 10. Finance and Insurance
 11. Real Estate Rental Leasing
 12. Professional, Scientific, and Technical Services
 13. Management of Companies and Enterprises
 14. Administrative and Support (incl. travel agency and tour operators)
 15. Educational Services
 16. Health Care and Social Assistance
 17. Art, Entertainment, and Recreation (incl. visitor industry)
 18. Accommodation (incl. visitor industry)
 19. Food Services (incl. visitor industry)
 20. Other Services
 21. Other industry (specify type of business:) _____
 22. Waste Management and Remediation Services



23. Unemployed

99. Don't know/refused

18. Please select your occupation.

1. Management
2. Business and Financial Operations
3. Computer and Mathematical
4. Architecture and Engineering
5. Life, Physical, and Social Science
6. Community and Social Service
7. Legal
8. Educational Instruction and Library
9. Arts, Design, Entertainment, Sports, and Media
10. Healthcare Practitioners and Technical Occupation
11. Healthcare Support
12. Protective Services
13. Food Preparation and Serving Related Occupations
14. Building and Grounds Cleaning and Maintenance
15. Personal Care and Service Occupations
16. Sales and Related Occupations
17. Office and Administrative Support
18. Farming, Fishing, and Forestry
19. Construction and Extraction
20. Installation, Maintenance, and Repair
21. Production
22. Transportation and Material Moving
23. Other/Unsure (please specify:)

95. Government worker/state of federal

96. Gig worker/Independent Contractor/Free Lance/Self Employed

97. Unemployed

99. Don't know/refused

19. What are your annual earnings before taxes? (Please count only your own personal earnings, not the income of other household members)

1. Less than \$25,000
2. \$25,000 to \$49,999
3. \$50,000 to \$74,999
4. \$75,000 to \$99,999
5. \$100,000 to \$149,999
6. \$150,000 to \$199,999
7. \$200,000 or more
99. Prefer not to say (VOL)



EMPLOYER SURVEY: EMAIL INVITATION



Aloha,

The **State of Hawai'i's Department of Business, Economic Development & Tourism (DBEDT)** is conducting a statewide study to examine the characteristics of Hawai'i's remote workforce, in order to better understand and address Hawai'i's changing economic landscape for both employers and employees. The results of the study will help shape programs and policies on the remote work marketplace by understanding current remote work practices and future plans, capacity, benefits and challenges, and interest levels from the perspectives of both Hawai'i's employers and employees. The study requires input from Hawai'i-based businesses across all industries, making your participation in this study very important and valued.

DBEDT has contracted Anthology Research to conduct this study to build upon the state's Remote Work Demonstration Project, which was launched in 2020 to preliminarily assess remote work's viability and opportunities for the citizens of Hawai'i. Please assist us by completing this survey. *Your answers to the questions in this survey will remain confidential and no identifying information will be connected to your responses.*

To show our appreciation for your time, anyone who completes a survey is eligible to enter a drawing to receive one of five \$250 gift cards.

Follow this link to the Survey: [\\${!://SurveyLink?d=Take the Survey}](#)

If you have difficulty accessing or any questions about this survey, please contact Anthology Research at surveys@anthologygroup.com.

Mahalo for your contribution to this important survey.

[ANTHOLOGY]

Anthology Research Team

1003 Bishop St., 9th Floor,

Honolulu, HI 96813

Office: 808.544.3000

Visit us at <http://www.AnthologyResearch.com>

Follow the link to opt out of future emails: [\\${!://OptOutLink?d=Click here to unsubscribe}](#)



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EMPLOYER SURVEY: POSTCARD



Survey of Hawai'i Businesses

Complete the survey to be eligible for a drawing to win a \$250 gift card.



Jane Doe
1234 Address St
Honolulu, HI 96817

Statewide Business Survey

Aloha,

The State of Hawai'i's Department of Business, Economic Development & Tourism (DBEDT), has contracted Anthology Research to conduct a statewide study to examine the characteristics of Hawai'i's remote workforce, in order to better understand and address Hawai'i's changing economic landscape for both employees and employers. The study requires input from Hawai'i-based businesses across all industries, making your participation in this study very important and valued.

You can complete the survey online by visiting www.HawaiiRemoteWorkSurvey.com and entering the eight-digit number in the black box below.

If you prefer to complete the survey over the phone or request a paper copy to be mailed to you, please call Anthology Research at **(808) 544-3024**.

Mahalo for your contribution to this important survey!



Scan QR code with your phone to open the survey!

Eight-Digit Number

1 2 3 4 5 6 7 8



EMPLOYEE SURVEY: POSTCARD



Survey of Hawai'i Residents

Complete the survey to be eligible for a drawing to win a \$250 gift card.

[ANTHOLOGY®]
RESEARCH

Survey of Hawai'i Residents

Aloha,

The State of Hawai'i's Department of Business, Economic Development & Tourism (DBEDT) has contracted Anthology Research to conduct a statewide study to better understand and address Hawai'i's remote work landscape. Your participation in this study is very important and valued, regardless if you work remotely or not.

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