

Facing Uncertainty:

The Challenges of COVID-19 in the Workplace



COVID-19
WORKPLACE COMMONS

ASU Arizona State University

WORLD ECONOMIC FORUM

WITH SUPPORT FROM

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Executive Summary



In this year like no other, COVID-19 is living up to the worst of the worst expectations. The virus is aggressive, unrelenting and sneaky. Just when we start believing that we are returning to our normal lives, we lose control again with another surge in COVID-19 cases and deaths. At the time of this report, there are at least 55 million cases and more than 1.3 million deaths globally.¹ The U.S. leads all countries in both COVID-19 cases (over 11 million) and deaths (over 250,000), and U.S. COVID-19 hospitalizations are at a new high.^{1,2} This surge, the United States' third, is showing no signs of abating with seven straight days of a record number of new cases.³

In response to the pandemic, Arizona State University convened a [National COVID-19 Diagnostics Summit](#) in May 2020 with diagnostic leaders who came together to identify problems and recommend immediate solutions.

The Summit resulted in the creation of the ASU COVID-19 Diagnostics Commons (COVID-19 Commons) which consists of several initiatives, including the COVID-19 Testing Commons and COVID-19 Workplace Commons.⁴ Many Summit participants expressed their concern about the lack of information about how employers were responding to the pandemic and the restrictions imposed on their businesses. Companies made quick decisions to send employees home without a game plan to bring them back. To address these concerns, the Workplace Commons was born. It was designed with a clear goal — to democratize knowledge during this global pandemic by providing information on COVID-19 employer responses.

The Workplace Commons initiative features an innovative, interactive back-to-workplace data dashboard that

enables access to anonymized global survey data completed by employers in 29 countries, 23 industry sectors, 1,125 companies and 1,141 facilities. *Workplace Commons' Facing Uncertainty: The Challenges of COVID-19 in the Workplace*, provides employer data about the impact of the pandemic on six different types of pandemic-related workplace practices including testing, contact tracing, facilities safety, pandemic response, financial impact and pandemic preparedness. In addition, the Workplace Commons houses a number of employer case studies that provide practical insights into how employers around the world are responding to the pandemic. As the pandemic and employer responses continue to evolve, the Workplace Commons will be updated with results and findings from two additional survey deployments during 2021.

Moving Forward

Employers are essential to our full economic and social recovery. While the transition to working at home happened faster and more successfully than expected, going back to the workplace may be more difficult and will likely take a much slower path. The desire for workers to return to the workplace is one indicator of the opportunities and challenges to come with returning to work. According to employers in our survey, 66% of workers have a positive attitude, to greater and less degrees, towards returning to the workplace. That is a reason for optimism but 24% of workers are reluctant or don't want to return to the workplace.

We hope that this report elucidates some of the challenges faced by companies today and helps benchmark current practices. Moving forward, we will continue to monitor how employers are facing the challenges of COVID-19. Over time, we expect to see a clearer picture of which strategies and approaches are most effective. With this and other data, we can and will take back control from this virus.

Methodology

The COVID-19 Workplace Commons - Keeping Workers Well survey was distributed to over 58,423 individuals representing more than 33,460 company and trade association leaders aged 18+ from 23 industry sectors residing in at least 29 countries on five continents. The survey was conducted online between July 27, 2020 and October 20, 2020 in English and approved by Arizona State University's Institutional Review Board (IRB). The survey contained 115 questions within seven broad categories including facility/company location and industry sector, testing, contact tracing, facility safety, pandemic response, financial impact and pandemic preparedness. Respondents were informed that their participation would remain confidential and were given the ability to skip any question within the survey. Ipsos, a global leader in market research, assisted with securing a majority of survey responses, resulting in 970 completions between September and October 2020 through the use of multiple panels across various industry sectors in English-speaking countries. Excluding responses with less than 80% completion rate, the survey resulted in 1,141 valid responses. Survey data were examined, including categorization of qualitative responses (e.g. 'Other - please specify') for the following: industry sector, reasons for companies not testing, main challenges of contact tracing, frequency of viral testing, where workers are being tested, factors for choosing testing providers, who receives positive results of employees, and where data about positive test cases are stored. ASU's Decision Theater summarized results and the data featured on the COVID-19 Workplace Commons website dashboard represents valid responses.

Survey Overview

5
Continents

23
Industries

29
Countries

1,125
Companies

1,141
Facilities

Top 5 types of facilities in rank order [left to right]



Office Work



Light
Manufacturing



Distribution /
Warehouse



Hospitality /
Entertainment



Data Center /
Tech Services

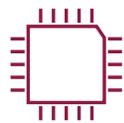
Top 10 industries represented in rank order



Business +
Professional
Services
(Accounting,
Brokers,
Corporate Banking,
Legal, etc.)



Consumer Retail
Services



Technology
and Software



Non-profit
Organization



Manufacturing



Construction



Retail Stores
(Malls,
Clothing,
Car Dealerships,
etc.)



Media +
Entertainment



Healthcare,
Hospitals,
and Clinics



Agriculture +
Food Production

Testing

A national testing strategy has not been implemented in the U.S. to date; however, it is clear that effective testing and screening for COVID-19 is necessary to contain outbreaks of the virus and decrease the number of cases and deaths related to COVID-19.⁵ The Rockefeller Foundation has called for a National COVID-19 Testing Action Plan in the U.S. to reduce the spread of the coronavirus.⁶

The question is what role workplace based testing can and should play? Initially, this was our foundational question, but it became clear that at the time of data collection most employers were not ready to take on the responsibility of testing. Only 17% of the companies surveyed are testing their employees. For those employers who reported testing employees, roughly 60% of companies make testing mandatory. Of those companies that are testing, 44% are testing for both the virus and antibodies, 40% are testing for the virus only, 8% are testing for antibodies only, and 7% did not indicate the type of testing. The frequency of viral testing varies greatly with 19% testing daily, 37% weekly and the remainder, 44%, testing less frequently than that.

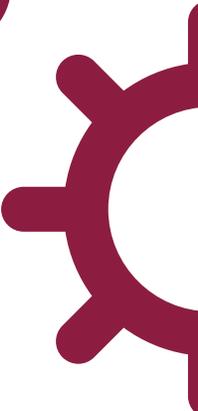
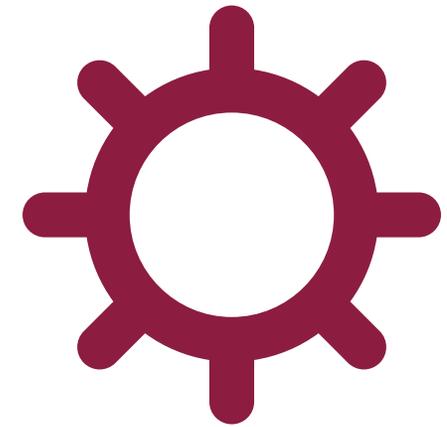
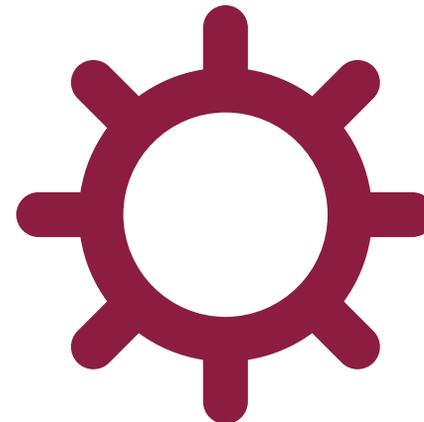
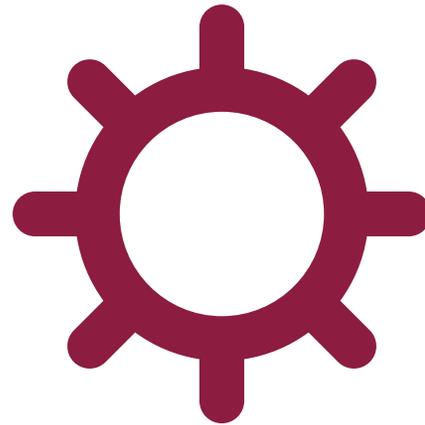
We also asked why companies are choosing not to test. The top three reasons are: #1 Too costly, #2 Too complicated to implement, #3 Too much concern about test accuracy.

17%
Test their workers

40%
Test only for viral infection

44%
Test for both

8%
Test only for antibodies



Reasons why companies choose not to ~~test~~

28%
Too costly

22%
Too complicated to implement

18%
Concern about test accuracy

17%
Don't believe it will help reduce infection

16%
Time to obtain test results

15%
Test availability

12%
Lack of knowledge or information

11%
Don't understand options

10%
Worried about liability

10%
Worried about employee privacy

8%
Small workforce

6%
Not needed

4%
Concern about employee compliance

4%
Working remotely

3%
Other

2%
Government testing

1%
Not applicable

1%
Employees not experiencing symptoms

1%
Not available

1%
Currently closed

Main reason companies do not test: **Too costly**

Uncertainty abounds: **50% of respondents were uncertain about future plans for testing**



Viral Testing

83% (160)

Companies that test for viral infection

61%

Companies with mandatory testing

56%

Companies that test at least once a week

What was the most important factor in you choosing a testing provider?



38%

Quality of tests

20%

Test result turn around time

20%

Government recommended

17%

Test were available

3%

Colleague recommended

1%

Employee health provider

1%

Location

How frequently are you performing viral testing?

19%

Daily

37%

Once a week

6%

Every other week

12%

Once a month

16%

Only when symptomatic

6%

One time only

4%

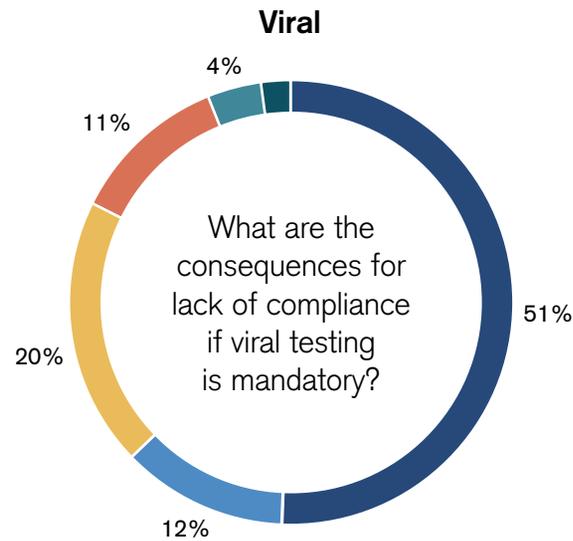
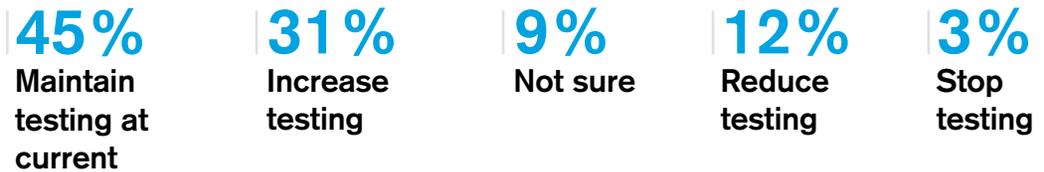
Varied

Viral vs. Antibody Testing

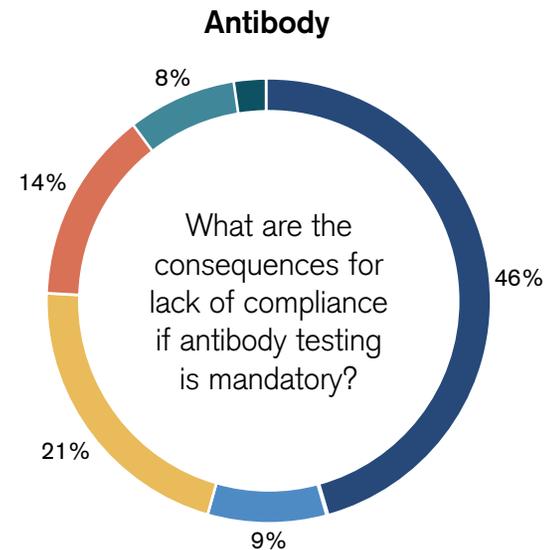
What are the future plans for viral testing?



What are the future plans for antibody testing?



- 2-week quarantine at home
- Change of work responsibilities
- Disciplinary action up to termination
- None
- There are no company testing requirements
- Other



- 2-week quarantine at home
- Change of work responsibilities
- Disciplinary action up to termination
- None
- There are no company testing requirements
- Other

Viral vs. Antibody Testing

Viral

1:1

Direct to indirect cost ratio for viral tests

25%

% of workers that tested positive:

Where are your workers being tested?*

41%
Health testing laboratory

36%
On site at our facility

24%
Local/regional hospital

24%
Pharmacy close to facility

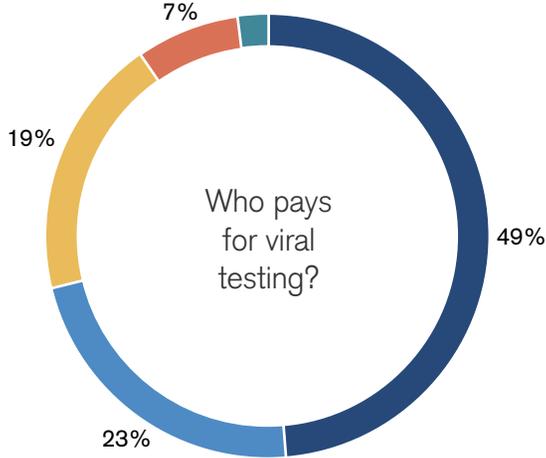
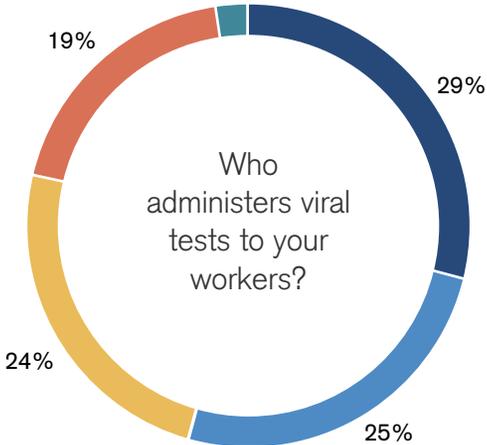
12%
At home

10%
Academic or university site

2%
Other

2%
Clinic/health care provider

1%
Health department site



- Employees of pharmacy or hospital
- Internal / company medical workers
- Local public health authorities
- Third party contractors hired for this task
- Other

- Employees of pharmacy or hospital
- Internal / company medical workers
- Local public health authorities
- Third party contractors hired for this task
- Other

* Multiple responses are allowed

Antibody

1.25:1

Direct to indirect cost ratio for antibody tests

36%

% of workers that tested positive:

Where are your workers being tested?*

33%
Health testing laboratory

31%
On site at our facility

28%
Local/regional hospital

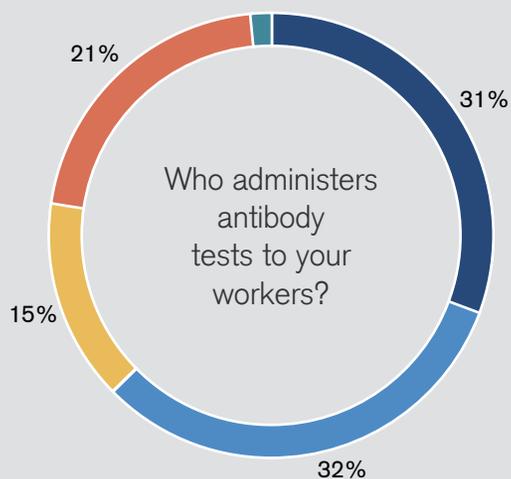
24%
Pharmacy close to facility

8%
At home

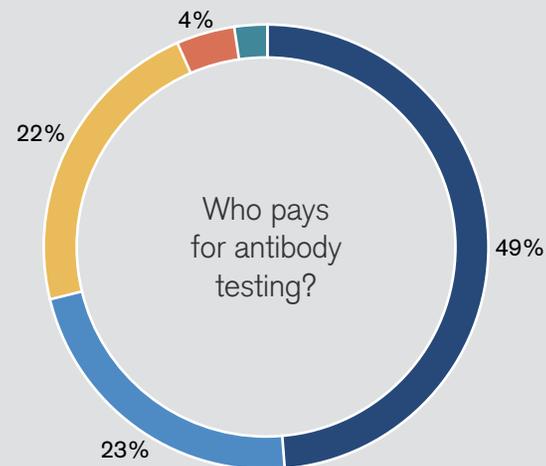
10%
Academic or university site

5%
Other

22%
Pharmacy close to facility



- Employees of pharmacy or hospital
- Internal / company medical workers
- Local public health authorities
- Third party contractors hired for this task
- Other



- Employees of pharmacy or hospital
- Internal / company medical workers
- Local public health authorities
- Third party contractors hired for this task
- Other

* Multiple responses are allowed

Pandemic Response / Preparedness

Significant time and resources for emergency response planning and development of written plans has been a regular undertaking by employers and governments worldwide for decades.⁷ We therefore found it surprising that only 36% of businesses report having a formal disaster or emergency response plan in place pre-COVID-19. For those with a plan in place, a large majority (81%) had a fire emergency response plan with only 39% having any type of epidemic / pandemic emergency plan. Among those with prior emergency preparedness plans, 47% identify those plans as mostly or very useful for responding to the COVID-19 pandemic.

While many may have forgotten that the world experienced five pandemics over the past one hundred years, we believe that no one will forget COVID-19 any time soon.⁸ As a result, we expect that many employers will develop robust pandemic / epidemic preparedness plans for the future.

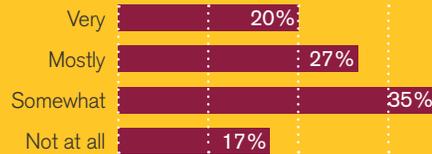
The COVID-19 pandemic has resulted in immense economic disruption to individuals, employers, markets and society. The cost to the global economy due to the pandemic is estimated at \$1 trillion for 2020 alone, and public companies that remain open reported new spending up to \$1 billion related to employee pay and keeping their workforce and customers safe.^{9,10}

How are employers responding to the disruption of their businesses? By far, the action taken most often by employers is cutting personnel expenses. More specifically,

the most common action is a reduction in workforce, either on a temporary (35% of companies) or permanent (28% of companies) basis. The next most common action is temporary (28%) or permanent (27%) hiring freezes followed by reducing hours for hourly workers who were still employed (29% temporary and 25% on a permanent basis). Cost reduction is necessary not only because of business

interruptions, but also due to cost increases in business operations. The cost increases varied greatly across the surveyed companies. 26% of employers indicated that they have had an increase of 26% or more in monthly operating costs, excluding testing costs, due to the COVID-19 pandemic. The remaining 74% of companies are experiencing cost increases of less than 25%.

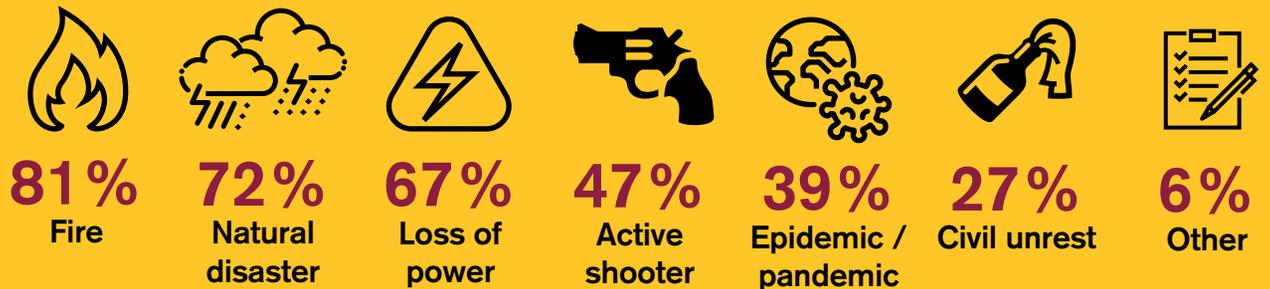
Have these plans been useful for responding to the COVID-19 pandemic?



36%
Had emergency
response plan in 2019

20%
Plan was very useful in
response to COVID-19

What type of emergency plans did those companies have?*



* Multiple responses are allowed

Actions Taken

63% (714)
Companies that made temporary adjustments

55% (625)
Companies that made permanent adjustments

Top adjustment made due to financial pressures:
Reduction in workforce

What actions have you taken?* (Permanent Temporary)



* Multiple responses are allowed



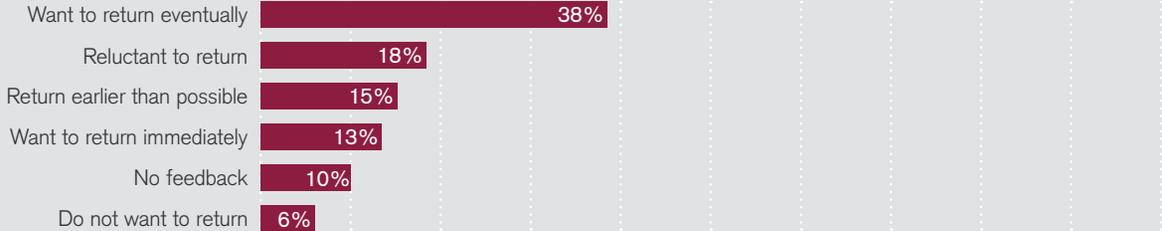
Remote Work

43% (489)
 Companies that required
 workforce to work from home

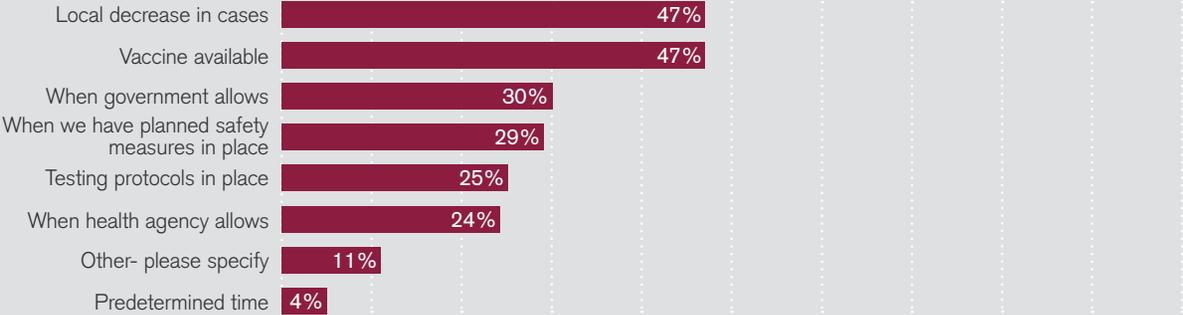
76%
 Highest % of remote
 employees during pandemic

64%
 Current % of remote
 employees

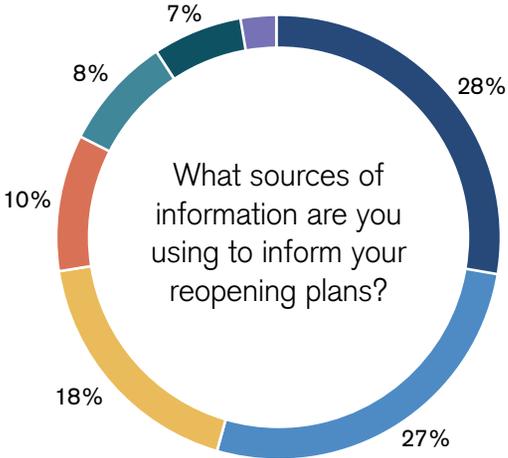
What is the overall workforce's opinion about returning back to the workplace?



What milestones need to occur in order for you to return workforce to work onsite*

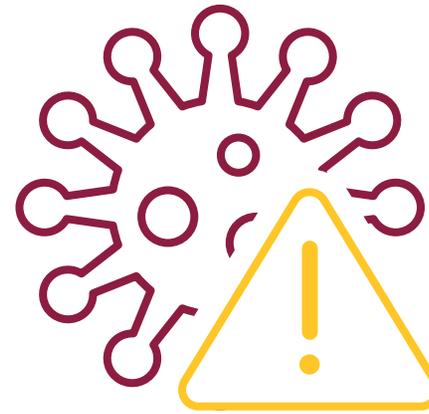


* Multiple responses are allowed



- National health agencies (CDC, NHS, etc.)
- Local / state / regional health agencies
- World Health Organization (WHO)
- Networking with colleagues
- Media
- Trade / industry organizations
- Other

Coming Back



Top 5 concerns for returning to work



* After work

* Multiple responses are allowed

66%
Positive attitude towards returning

24%
Negative attitude towards returning

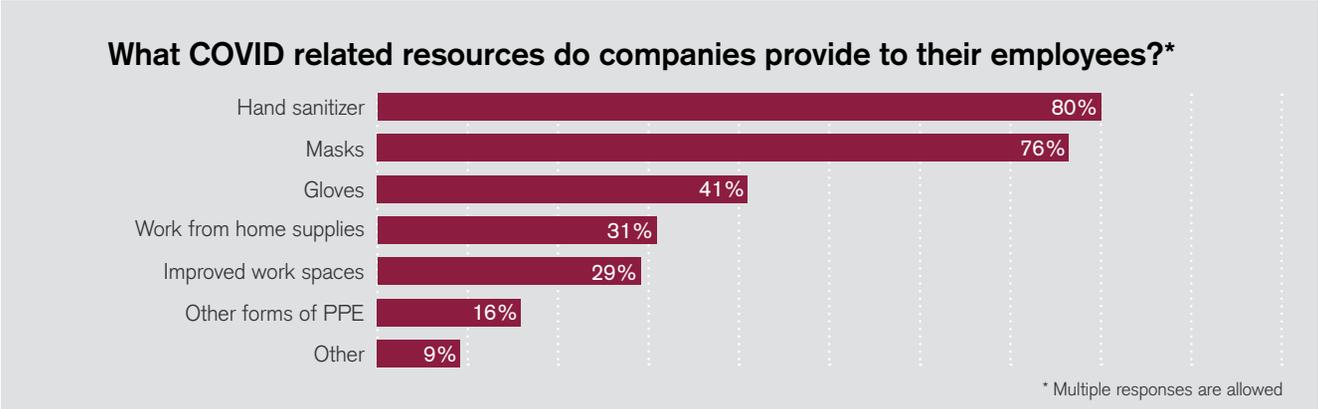
Facility Safety

As we learned how COVID-19 is transmitted, it became clear that employers needed to take precautions in their workplaces to keep their employees safe and healthy. Virtually all employers made some modifications to operating procedures and created new safety protocols to mitigate risk of virus spread for employees while working. According to a July 2020 conducted by the National Safety Council of U.S. based businesses with at least 250 employees, all eighteen industry sectors were investing in keeping their employees safe and healthy.¹¹

U.S. employers indicated that they are enabling employees to more easily practice good hygiene, increasing frequency of cleaning and sanitation, providing PPE including face coverings and face shields, investing in ways to increase the ability of employees to work from home, encouraging physical distancing with visual reminders and signage in buildings and allowing non-essential workers to work remotely.¹¹ The Workplace Commons global employer survey echoes many of these major findings. Our survey results indicate that 74% of employers are requiring their employees to wear masks while 26% of employers have a more restrictive visitor policy since COVID-19.

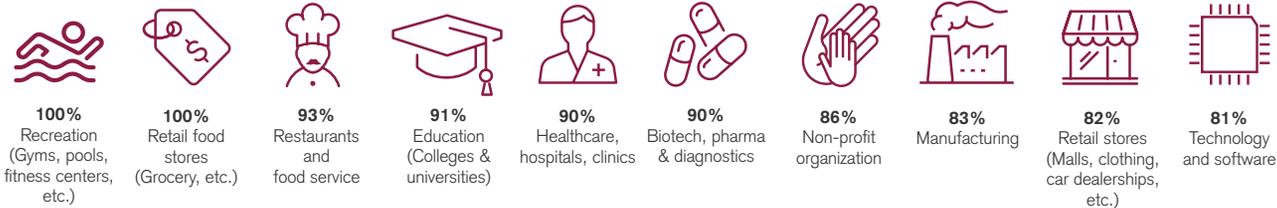


74%
Require masks
for employees



26%
More restrictive visitor
policy post-COVID

Top 10 industries requiring masks



Contact Tracing

Contact tracing to reduce disease transmission is not a new phenomenon. The origin of contact tracing during disease outbreaks dates back to the 1854 cholera epidemic in London.¹² John Snow hypothesized that the water from the Broad Street pump was contaminated, but it wasn't until he went house to house collecting detailed information that he was then able to link the deaths to the Broad Street pump.¹² Contact tracing along with the development of a vaccine led to the eradication of smallpox.¹³ Smallpox transmission required close face-to-face contact, so contact tracing enabled for close acquaintances to be identified, isolated and monitored.¹⁴

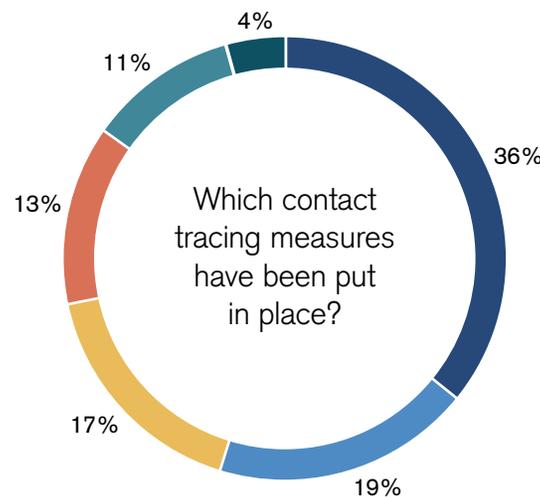
Fast forward to today and COVID-19. The U.S. has failed to devise, fund and execute a national strategy for contact tracing.¹⁵ Employers, however, remain committed to trying to contact trace, at least within their own organization. 43% of companies who responded to the Workplace Commons survey report that they are performing some form of contact tracing, and of those, 58% say contact tracing is mandatory. While corporate liability is also acknowledged as a concern for employers conducting contact tracing, only 17% stated that they ask workers to sign liability waivers for contact tracing.

Unfortunately, contact tracing has not been as effective as hoped. Outside of the U.S., several other countries have more successfully implemented national contact tracing strategies, with either human or electronic tracing systems. Results have varied, but several countries have seen early diagnosis of COVID-19 and some reduction in virus transmission.¹⁵

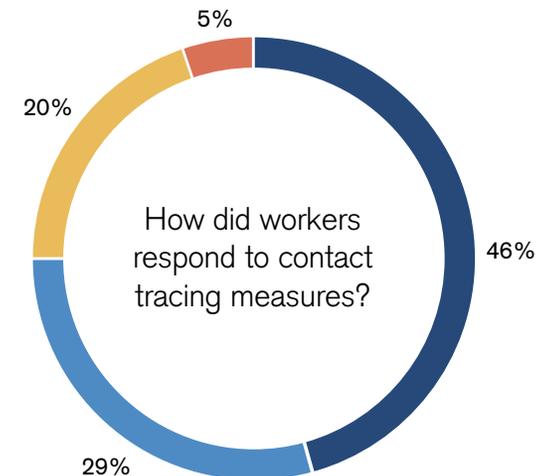
43% (496)
Companies that perform contact tracing

38%
Trace workers' contacts outside of workplace

58%
Contact tracing mandatory



- Human contact tracers - internal company - to track close contacts
- Smart phone apps to track close contacts / physical location
- National or regional or state government
- Human contact tracers - third party to track close contacts
- Unsure
- Other



- Employees are generally positive about these measures
- Unsure / have no data
- Employees are neutral about these measures
- Employees are generally negative about these measures

Contact Tracing Protocols

43% (496)

Companies that perform contact tracing

15%

Have threshold at which facility will be shut down

17%

Ask workers to sign liability waivers

18%

Have protocols in place if cluster of infections are emerging



What requirements does COVID positive worker need to meet to return to workplace?

42%

2-week quarantine at home

21%

Two negative viral tests

17%

One negative viral test

10%

Other

10%

No symptoms for a week

What are the protocols for employees who might have come into contact with a positive person at work?

31%

Must self-quarantine without using vacation / sick days

20%

Encouraged to self-quarantine using vacation / sick days

18%

Encouraged to self-quarantine without using vacation / sick days

16%

Testing

14%

Must self-quarantine using vacation / sick days



Endnotes

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