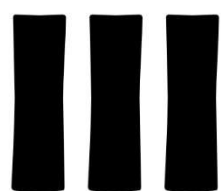# 2024

Teleworking in the Valencian Community

III

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EXECUTIVE SUMMARY

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TELEWORKING IN THE VALENCIAN COMMUNITY IV

Executive Summary

The purpose of this study is to identify the main characteristics of teleworking in the Valencian Community. Its objectives include determining the prevalence and trends of teleworking, identifying the challenges, threats, and opportunities it presents for both workers and companies, and detecting its weaknesses, strengths, risks, and motivating factors for workers. Additionally, the study aims to define and analyse the profile of teleworkers and their working conditions to better understand this phenomenon and provide actionable recommendations to stakeholders, enabling them to address the challenges posed by this form of work effectively. To achieve these objectives, a survey was conducted among 2,010 people in the Valencian Community between 14 and 30 May 2024, with detailed results presented in the report. The key findings are summarised below.

Quantification and profile of teleworkers

Magnitude: Of the total workers surveyed, nearly half perform tasks compatible with teleworking; however, only 15.39% currently work from home. This indicates that only a third (32.4%) of those whose roles are suitable for remote working are actually teleworking, whether fully or partially. This suggests significant potential for the growth of this modality in the future.

Gender Profile: The proportion of men and women working from home is relatively similar, with men slightly outnumbering women (54.3% men vs. 45.7% women). This trend has remained stable over the past three years, with no notable differences between teleworkers and non-teleworkers. Thus, teleworking cannot be identified as a work modality particularly associated with one gender.

Age: The most represented age group among teleworkers is 35 to 45 years old, accounting for 35% of teleworkers. In contrast, those under 26 and over 56 are underrepresented. The low presence of younger workers may be attributed to limited experience or "confidence" on the part of employers due to a lack of seniority, while the lower participation of older workers could stem from limited technological skills or resistance to changes in work models. This trend has persisted and even intensified this year.

Geographical distribution and origin: 51.1% of teleworkers reside in urban areas (populations exceeding 50,000), slightly higher than the 46.1% of non-teleworkers. Despite the remote nature of teleworking, it does not appear to have a significant impact on rural areas and remains more prevalent in urban settings than face-to-face work. Regarding origin, a higher proportion of teleworkers are foreign-born (13.6%) compared to non-teleworkers (7.3%). Among teleworkers, while Latin American migrants remain the majority, there is an increasing presence of individuals from European backgrounds.

Household of the teleworker: No significant differences were observed between the households of teleworkers and non-teleworkers in terms of household size or the number of economically dependent members. Although teleworking is often perceived as advantageous for family work-life balance, it does not appear to attract individuals with greater needs for such conciliation in practice.

Socioeconomic level, education and employment status: Teleworkers are more likely to belong to high or medium-high socioeconomic groups (66.7%) compared to non-teleworkers (48.8%). Additionally, the vast majority of remote workers possess high levels of education (81.9%), predominantly in fields such as Engineering and Architecture, and Social and Legal Sciences. Teleworking is therefore more common among individuals with specialised training and medium to high incomes.

Regarding employment status, teleworking is more prevalent among self-employed individuals (33.8% vs. 15.2% among non-teleworkers). However, no significant differences were observed between teleworkers and non-teleworkers concerning contract type, working hours, multiple employment situations, or intentions to change jobs.

"The profile of a teleworker in the Valencian Community is typically a man or woman aged between 35 and 45, with a high socioeconomic and educational level, residing in urban areas, and holding qualifications in fields such as Engineering or Social Sciences. The underrepresentation of younger and older individuals in teleworking indicates a generational gap in the adoption of this work modality."

Characteristics of teleworking

Sectoral and business context: Teleworking in the Valencian Community has shown a decrease in the public sector this year, where activities are primarily focused on providing social and personal services. Conversely, there is a greater concentration of teleworkers in large companies. Women and younger workers tend to telework more frequently in small companies, while those with higher levels of education are more commonly found in large companies.

The decision to telework tends to be more flexible in the public sector, although employer-imposed teleworking is similarly prevalent across both public and private sectors. The growth of teleworking in small companies since 2020 suggests an adaptation to new working methods prompted by the pandemic, which have since been maintained among SMEs.

Declaration of activity: The vast majority of teleworkers (93.4%) engage in their activity in a formal and regulated manner. However, informality rises sharply to 23.5% among workers under 36 and is also significant in the social and personal services sector (11.7%). Despite these figures, the overall low rate of informality (6.6%) indicates that teleworking is not directly associated with an increase in informal or unregulated economic activities.

False Self-Employed: The implementation of teleworking and the physical distance from the workplace may serve as a pretext to disguise employment dependency as self-employment. Since self-employment is more prevalent in teleworking than in conventional work, it is important to explore the extent to which false self-employment may impact this sector. The following indicators suggest potential employment relationships among self-employed teleworkers:

- *Imposition of working hours*: 29.3% are unable to decide their schedules.

- *Limitations on substitution or subcontracting*: 64% report they cannot subcontract or be replaced without the client's approval in most cases.

- *Determination of the form of work*: 4.8% lack the freedom to decide how they perform their tasks, rising to 10.4% among women.

- *Intermediary clients*: 23.7% work for clients who resell their work to third parties.

- *Pricing*: 24.3% are unable to negotiate their rates and must accept prices set by the client.

These findings suggest that one in four self-employed teleworkers may experience conditions indicative of false self-employment, highlighting a significant issue within the sector.

Type of work performed: Among teleworkers, 46.4% engage in activities requiring a university degree. However, due to the high proportion of highly educated individuals in teleworking, 28.6% perform tasks for which they are overqualified. Younger teleworkers (under 36) are more likely to undertake elementary tasks (35.5%) compared to their older counterparts (5.7%). A gender gap is also evident in managerial roles, with only 8.3% of women holding such positions compared to 18.2% of men.

Start of teleworking: 65% of teleworkers began working from home after March 2020, with two-thirds of these starting between March 2020 and March 2022. This underscores the pandemic's significant role in the adoption of teleworking. Indeed, 49.8% of respondents reported that teleworking was implemented by their companies specifically during the pandemic.

Degree, frequency and place of teleworking: Over half of teleworkers (54.7%) work remotely three or more days per week, and one in five teleworks full-time. Regarding regular teleworking (defined as remote working for at least 30% of working hours over a three-month reference period), 78.2% of respondents fall into this category. The home remains the primary teleworking location, utilised by 90.5% of teleworkers.

"Teleworking in the Valencian Community is characterised by a high prevalence of professional activities requiring university qualifications, alongside a notable proportion of workers experiencing overqualification. Gender disparities persist in managerial positions, with women underrepresented, and younger workers are disproportionately engaged in elementary tasks.

Regarding formality and informality, there is no significant prevalence of undeclared work. However, disguised employment relationships, such as false self-employment, affect approximately one-quarter of self-employed workers in this modality.

In terms of degree, frequency, and location, the majority of teleworkers perform their duties from their own homes, primarily within a virtual hybrid model."

Conditions offered by the companies

Flexibility: Temporal, spatial, and organisational flexibility remain key features of teleworking, though they do not benefit all teleworkers equally. Among employed teleworkers, 59.8% report being able to freely choose their working hours and days, 73.2% can select their place of work, and 78.2% have the autonomy to self-organise their tasks. Flexibility is highest among workers aged over 36, men, and those in the public sector.

Decision to telework: The imposition of teleworking by employers has decreased this year, applying to 18.8% of cases. Mutual agreement remains the most common method of implementation, accounting for 61.6%. Imposition is less common in the public sector (12.6%) compared to the private sector (21.3%), while women are more likely to be required to telework than men (29.3% vs 10.1%).

Resources for teleworking: The most commonly used tools for teleworking are laptops, followed by mobile phones and desktop computers. Email and collaboration platforms are the primary software solutions, but their adoption, while significant, is not universal (61.6% and 43.7%, respectively). Moderate use of instant messaging and specialised applications is also noted.

Equipment costs: Only 55.2% of teleworkers have all equipment costs covered by their employers. This percentage drops sharply to 24.5% for ongoing expenses and 10.6% for workspace-related costs. Teleworkers with medium education levels and those in the public sector are the most likely to bear these expenses themselves.

Compliance with regulations: According to Spanish legislation, telework that is carried out for at least 30% of the workday over a reference period of three months will be considered regular telework, and the requirements of Law 10/2021, of July 9, on Remote Work (LTD) will apply. Below, we analyse to what extent the practices outlined in the regulation have impacted the telework phenomenon in the Valencian Community, considering that those in a primarily virtual modality are legally obligated to comply with these requirements, and should, by law, cover all case:

- *Formalisation of a teleworking agreement*: 56.5% of teleworkers (60% in virtual modality) have a formalised agreement, with the figure dropping to 48.8% for women. Despite the low rate, this represents an improvement from previous years.

- *Existence of disconnection protocols*: Only half of teleworkers (50.5%, 50% virtual modality) report the presence of protocols for digital disconnection, decreasing to 34.3% in small companies.

- *Psychosocial risk assessment*: One in two workers believes their company does not adequately assess psychosocial risks related to teleworking (54.3% in virtual modality), though this has improved compared to prior years.

- *Training by the company*: 51.9% (55.4% virtual modality) report receiving adequate training, with women less likely to receive training than men.

- *Technical support for teleworking*: 20.9% (29.5% virtual modality) lack sufficient technical support, rising to 36.3% in the social and personal services sector.

- *Communication with supervisors and colleagues*: Appropriate communication channels with supervisors and colleagues are widely available, with rates exceeding 85%.

The data show that regulatory requirements have only had an impact in half of the cases and even when it comes to regular work, where compliance is imperative, compliance rates are still very low. However, a significant improvement is observed compared to previous years.

Company preparation: Companies report high levels of preparedness in areas such as technical equipment (72.6%), colleague readiness (72.6%), supervisor readiness (74.9%), work process organisation (80.3%), and documented teleworking policies (67.2%). These indicators have steadily improved over the past three years. However, the public sector, productive sectors, and social and personal services sectors show greater deficiencies, leaving room for further improvement.

Monitoring: Accurate time recording is only implemented in 62.9% of cases, representing an area requiring improvement given its status as a legal obligation. Worker monitoring through software or similar systems has decreased significantly, now affecting 46% of teleworkers. However, transparency around monitoring remains an issue: only 64.2% of monitored workers are informed about it, and results are shared with employees in just 42.1% of cases.

Supervisor supervision and assessment: Supervisors performance is generally well-rated, with positive feedback in the following areas: assignment of tasks and objectives (69.9%), support for teleworkers (69.8%), evaluation of work (70.7%), personal treatment (77.5%), meeting management (74.7%), fostering a positive work environment (67.6%), and technological skills (79.9%). These results represent a slight improvement compared to previous years, though some areas still leave room for enhancement.

> *"The conditions offered by companies for teleworking in the Valencian Community demonstrate significant progress in areas such as flexibility, as well as technical and human preparedness. However, important challenges remain that need to be addressed by companies and specific sectors. These include ensuring equal conditions for all workers, complying fully with legal obligations, covering the costs associated with teleworking, and enhancing communication and transparency regarding remote monitoring practices."*

Importance of aspects related to telework

Stable priorities: Over recent years, the ranking of aspects most valued by respondents regarding teleworking has remained relatively stable. Autonomy and flexibility continue to be the top priorities, followed by economic, environmental, and professional opportunities, in that order. While these preferences are broadly consistent across different groups, some subtle differences can be observed.

Differences by demographic: Women place greater emphasis on workplace flexibility, improved work-life balance, and reduced environmental impact compared to men. Meanwhile, individuals over the age of 36 value the reduction in commuting, choice of workplace, and work-life balance. Younger people tend to value gaining experience to secure better job opportunities. Educational level also plays a role, with higher educational levels correlating with greater importance placed on autonomy, cost savings, and work-life balance.

Preferences related to the work context: Self-employed workers prioritise autonomy more highly than other groups. Conversely, employees in small enterprises and the private sector show a stronger interest in professional aspects, such as job security, improving performance, and gaining experience.

"In general, the findings emphasise that teleworkers prioritise aspects that enhance their autonomy, flexibility, and work-life balance. The significance attributed to these aspects is influenced by a combination of demographic factors, working conditions, and individual preferences related to teleworking."

Psychosocial Risks

Risks observed by teleworkers: Survey respondents identified the main psychosocial risks of teleworking, ranked in order of relevance, as: 1) those derived from lack of disconnection from work, 2) lack of social contact, 3) increase in demands and skills needs, and 4) excessive workload.

Health implications: Between 10% and 20% of respondents reported that teleworking negatively impacts their physical and mental health.

- *Physical health*: 20.2% reported physical health issues such as back pain, neck pain, and weight gain, with higher incidence in the private sector and among those teleworking due to employer imposition (48%).

- *Mental health*: 9.7% indicated mental health problems linked to remote work, a concern particularly acute among young workers, 37.3% of whom reported such issues.

- *Stress*: 11.4% of teleworkers stated that teleworking has increased their stress levels, with higher rates among young people and those in the productive sector.

- *Risk of accidents*: 10.1% reported an increased risk of accidents, a figure that doubles among young people, those in the productive sector, and those teleworking due to employer decision.

Risks arising from carrying out the activity: Key concerns include increased responsibility for data protection (38.7%), equipment use, and the need for greater digital skills (30%). These concerns are most prevalent among men. Other risks include excessive workload (22.8%), reduced flexibility in work management (16%), lack of information or documentation (14%), and decreased productivity (12.1%). Younger teleworkers (under 36) and those in the private sector report higher rates in all these categories.

Risks arising from relationships with supervisors and colleagues: Around 18-19% of teleworkers noted difficulties in relationships with supervisors and colleagues due to teleworking and increased surveillance. Additionally, 12.2% reported a deterioration in trust-based relationships with their supervisors.

Risks derived from interpersonal relationships: The lack of social contact is one of the most significant risks to the health and safety of teleworkers (42.1%), consistent across different groups. Other risks, such as difficulties interacting with clients (14.1%), verbal aggression (14.4%), and sexual harassment (7.4%), are less frequent but more commonly reported by younger workers.

Risks due to lack of work-life balance and disconnection: These risks are the most frequently observed. 32% of respondents reported difficulties disconnecting from work, while 20-30% mentioned blurred boundaries between work and personal life, extended working hours, and teleworking outside contracted hours. The most common work activities performed outside working hours include answering emails (59.3%), phone calls (43.8%), and instant messaging (43%). Men, younger workers, and those in the private sector are the most affected.

Risks derived from lack of resources: Although less common, 15.1% of respondents reported that teleworking increases their personal expenses, rising to 35.6% among those under 36. Additionally, 17.2% noted a lack of technical support.

Risks arising from employment and professional career relationships: Fear of task automation (27.5%) is the most significant employment-related risk associated with teleworking. Other concerns include lack of control over job changes (14.6%) and difficulties in career progression (16.3%). These impacts are more pronounced among younger workers, men, and those who prefer face-to-face work.

"For the third consecutive year, the prevalence of various teleworking risks has remained relatively stable. Young people, those teleworking under employer imposition, and individuals who prefer face-to-face work tend to perceive and experience these risks more acutely.

The primary risks include lack of work-life disconnection, excessive workload, increased demands related to data and equipment protection, lack of social contact, and the need for improved digital skills. Conversely, risks associated with relationships with colleagues and supervisors, as well as those stemming from inadequate resources and technical support, have decreased."

Satisfaction and preference for teleworking

Satisfaction: The findings reveal that, while overall job satisfaction is high (mean score of 7.71), satisfaction specifically related to teleworking is even higher (mean score of 8.37). Furthermore, 64.2% of respondents report that their satisfaction has improved with teleworking, particularly women, those in the service sector, and workers who prefer this modality.

In general, satisfaction with teleworking has significantly increased compared to previous years. The results suggest that hybrid working configurations could play a key role as an added value for organisations seeking to attract and retain talent.

Preference for teleworking or face-to-face work: 69% of teleworkers express a preference for teleworking, compared to 31% who prefer face-to-face work. This marks a substantial increase from the 50.4% preference for teleworking recorded the previous year. The preference for teleworking is particularly strong among self-employed workers, those in the public sector, individuals in predominantly virtual roles, and those who began teleworking before the pandemic.

Although 53.7% of respondents perceive that their companies also favour teleworking, 46.3% report a business preference for face-to-face work, highlighting challenges in adopting effective hybrid models.

Propensity to leave work if teleworking ends: Nearly half of respondents (49.8%) would consider changing jobs if their company required full-time face-to-face work, a sharp rise compared to 31.2% the previous year. This trend is especially prevalent among those under 36, individuals in small households, workers in the private sector, and those in predominantly virtual roles. Overall, teleworking not only enhances job satisfaction but also serves as a critical factor in talent retention.

> *"Teleworking emerges as a key contributor to job satisfaction, with specific satisfaction ratings surpassing those for general work. Improvements in satisfaction levels have also been observed. The preference for teleworking has increased significantly, alongside a growing intention among workers to change jobs if full face-to-face work is required. These trends underscore the importance of adopting hybrid teleworking models as a strategy to attract and retain talent, while addressing the challenge of balancing the preferences of both workers and employers."*

RECOMMENDATIONS FOR PUBLIC ADMINISTRATION

Hybrid teleworking	The results of this report conclude that teleworking has a positive impact on both companies and workers. However, the risks identified are most prominent in fully face-to-face work environments. As such, companies and public administrations should focus on promoting hybrid teleworking models that combine a few days of teleworking with face-to-face work.
Teleworking in the public sector with evaluation of results	This study reveals a decline in teleworking within the public sector compared to previous years, a trend not observed in the private sector. A greater degree of distrust towards teleworkers in the public sector has been noted, despite public sector workers generally valuing the teleworking experience highly.To address this, we recommend promoting teleworking in the public sector while simultaneously implementing robust control methodologies based on objective setting and performance evaluation. This approach could help to reduce mistrust while supporting the adoption of teleworking in public administration.
Encouraging teleworking in rural areas	Teleworking remains more prevalent in urban areas, largely because highly educated individuals, who are more likely to telework, tend to reside in these environments. This trend, however, represents a missed opportunity to alleviate urban overcrowding by distributing employment opportunities more evenly. To address this, policies should encourage teleworking in rural areas, and companies should be incentivised to hire teleworkers based in these regions. Such measures could help to promote regional development and reduce the pressures associated with urbanisation.

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