

Employment and Travel Follow-up Survey Results

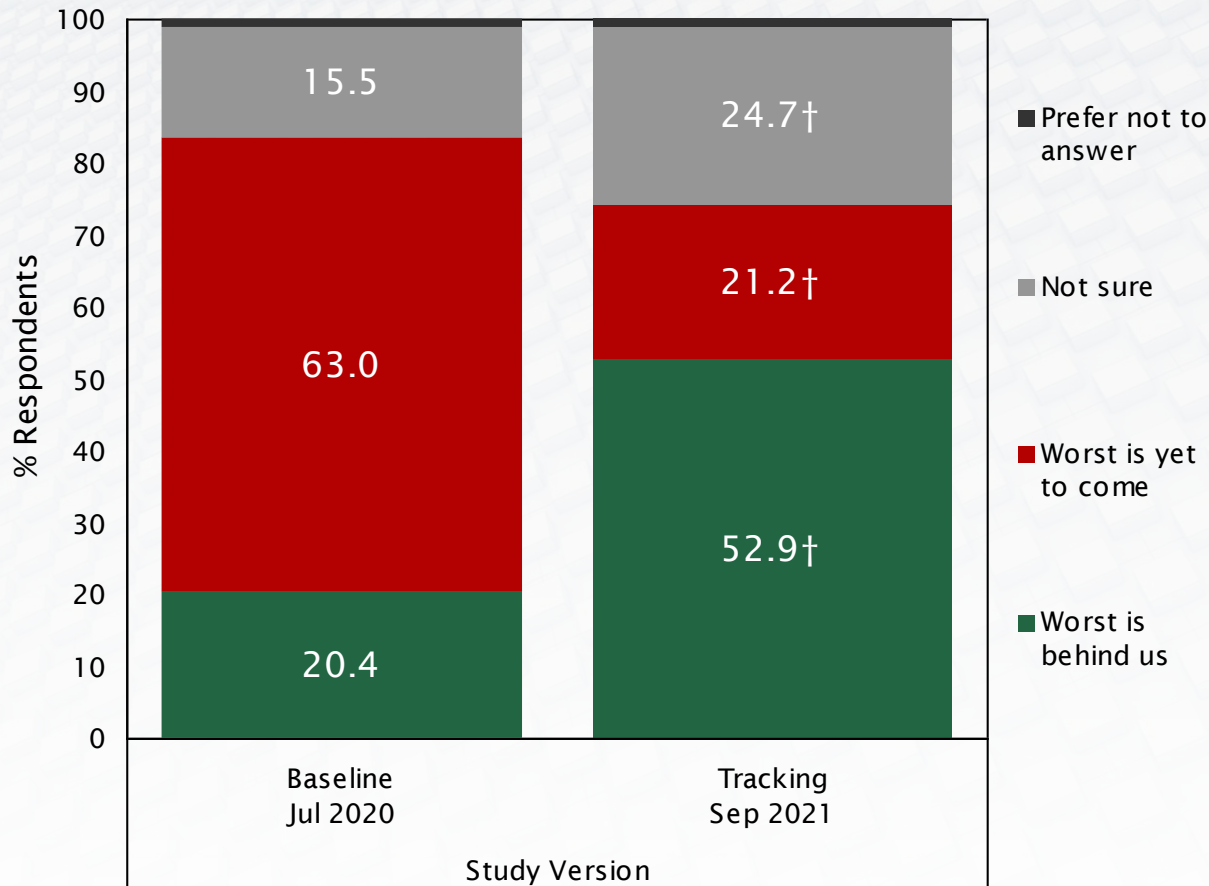
Purpose of Study

- Measure how the coronavirus (COVID-19) pandemic altered public attitudes, working arrangements, travel behaviors, mode choice, rideshare, and trips in short-term (three months into the pandemic).
- Identify degree to which changes have endured 18 months into pandemic.
- Profile pros/cons of remote work from employees' perspectives.
- Explore employees' expectations regarding post-pandemic work arrangements and commutes.

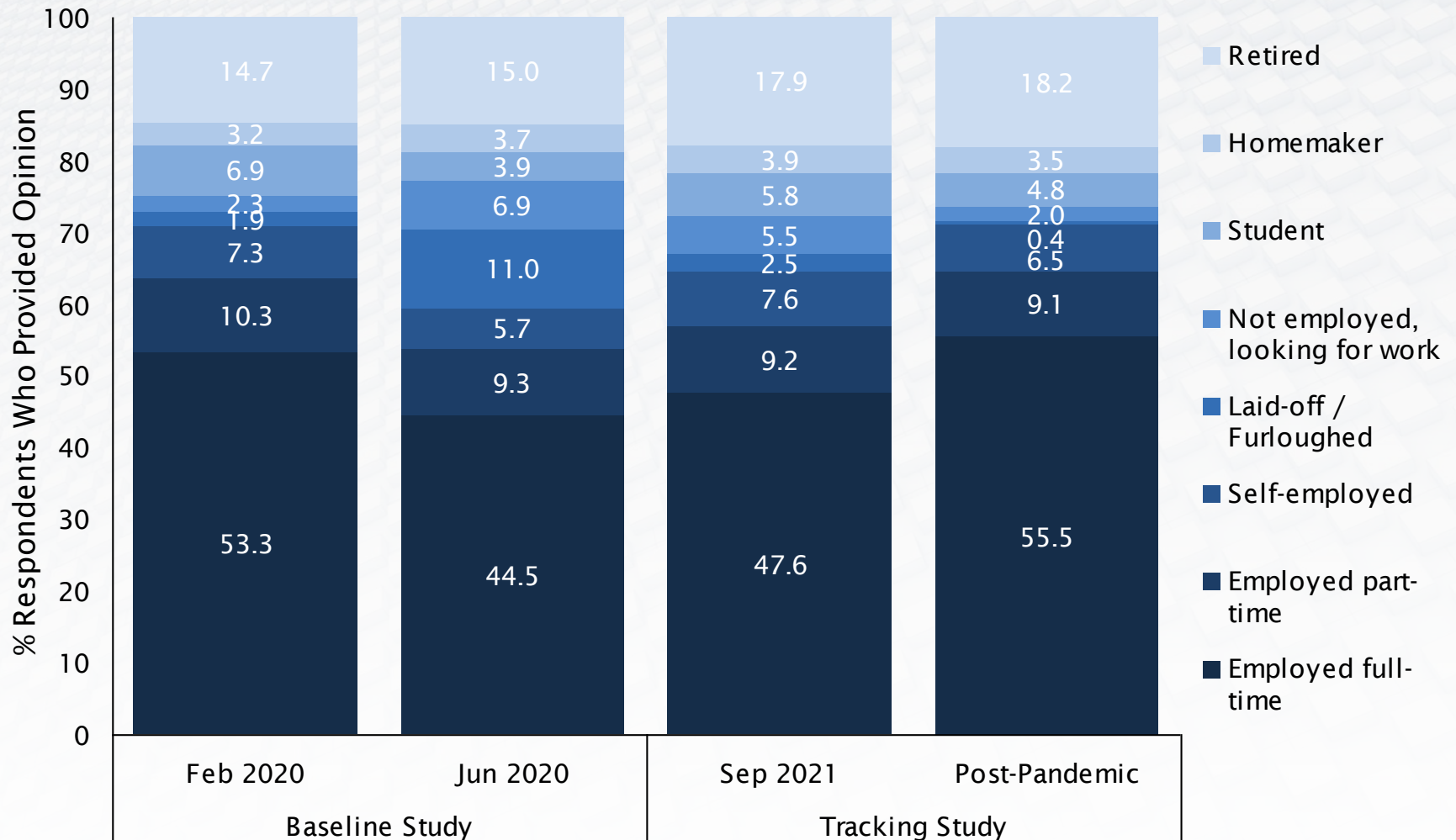
Methodology of Study

- Conducted September 2 to September 26, 2021
- Mixed-Methodology Survey
 - Stratified random sample of Orange County households
 - Multiple recruiting methods (email, text message, and telephone) and data collection options (telephone and online)
 - Completed 2,119 interviews
 - English, Spanish, and Vietnamese
- Overall margin of error: $\pm 2.1\%$

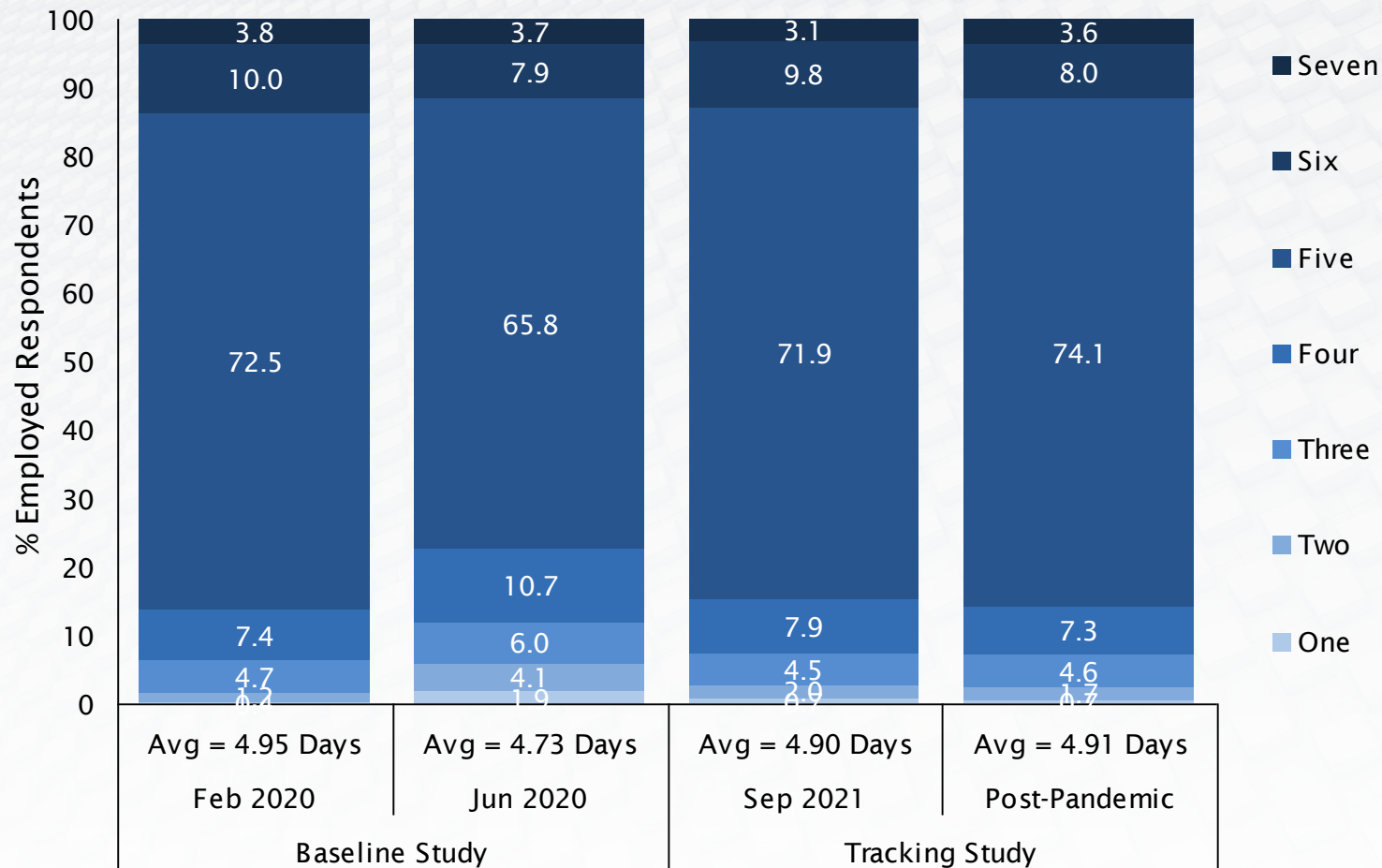
Opinion of COVID-19 by Study Year



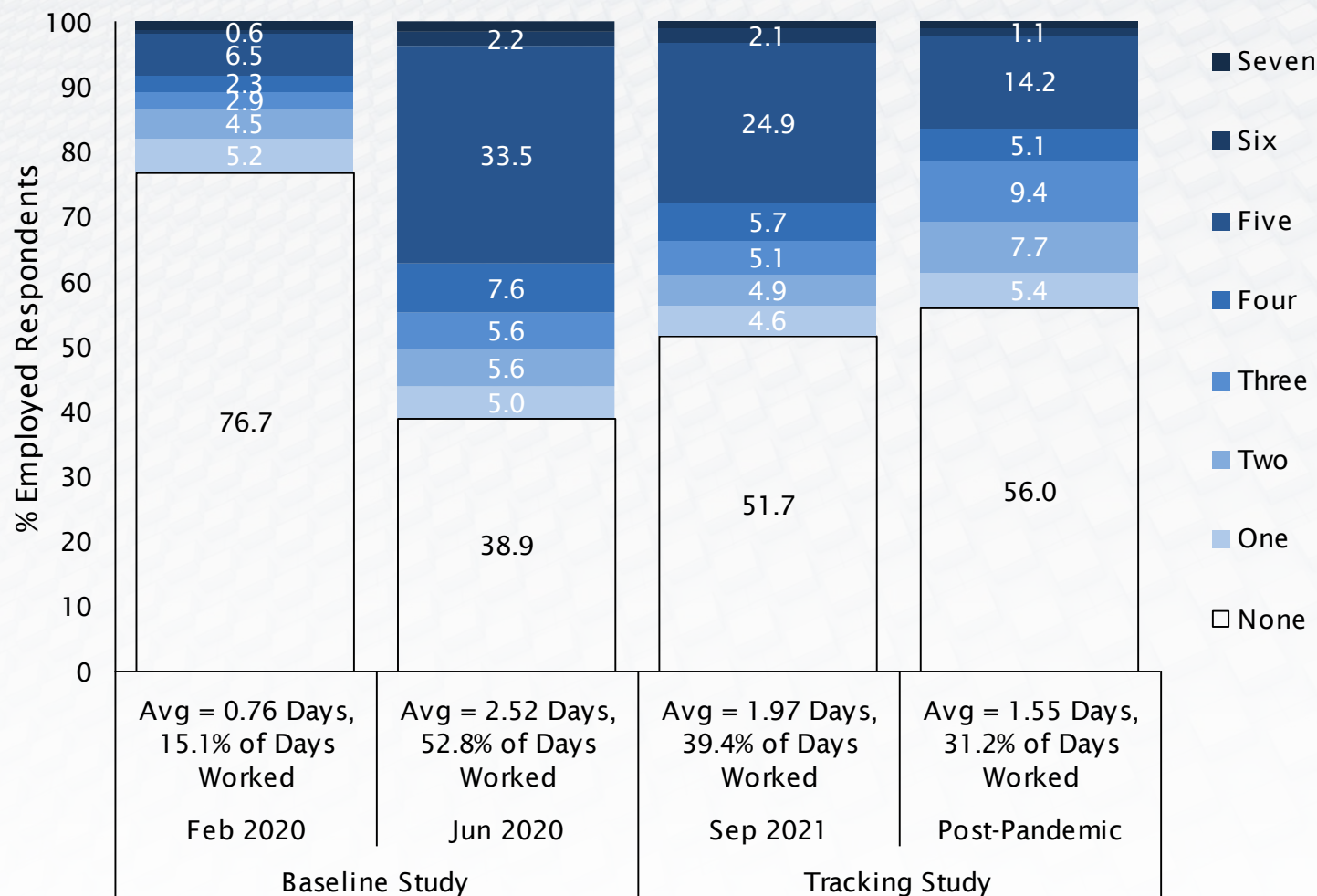
Employment Status



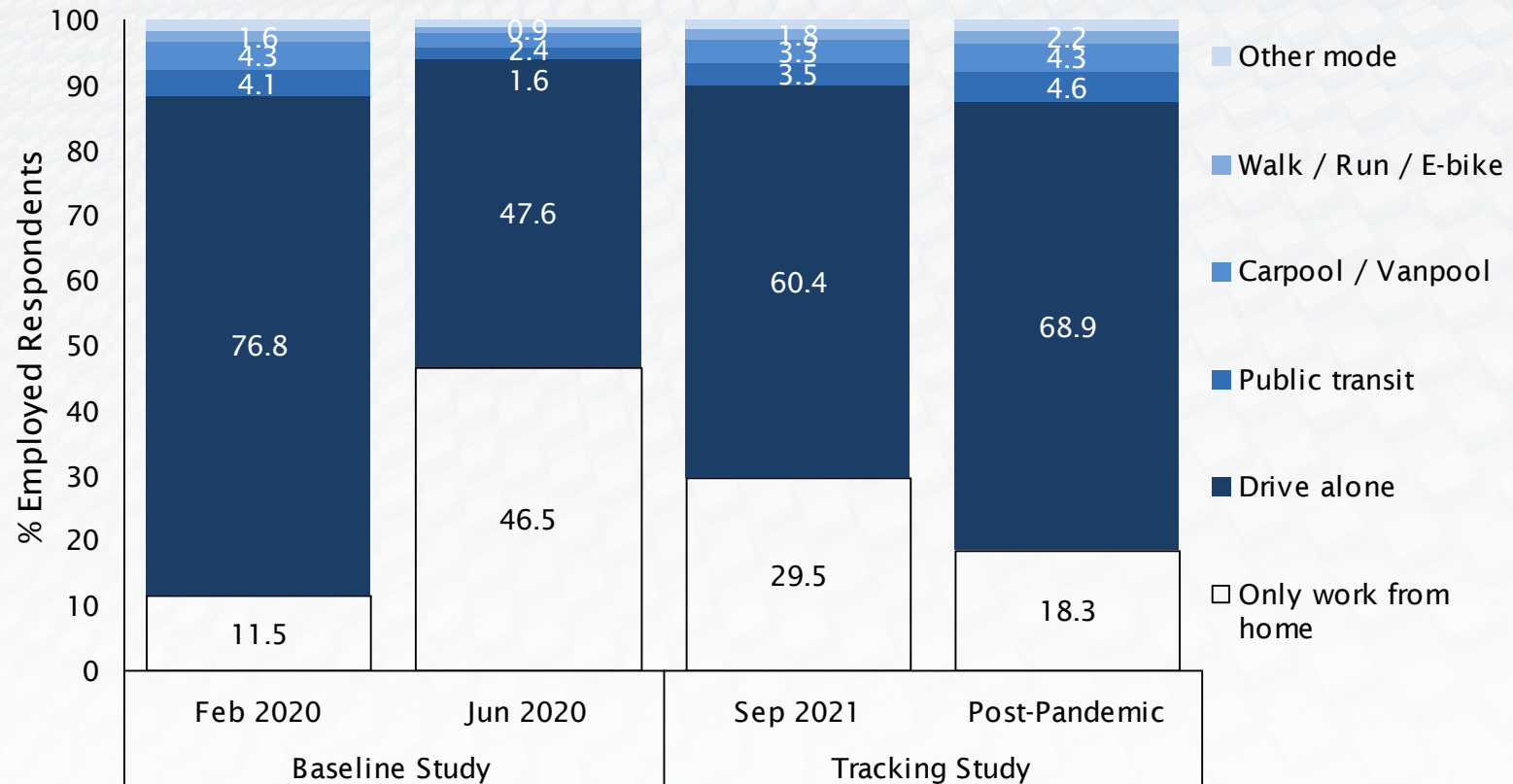
Workdays Per Week



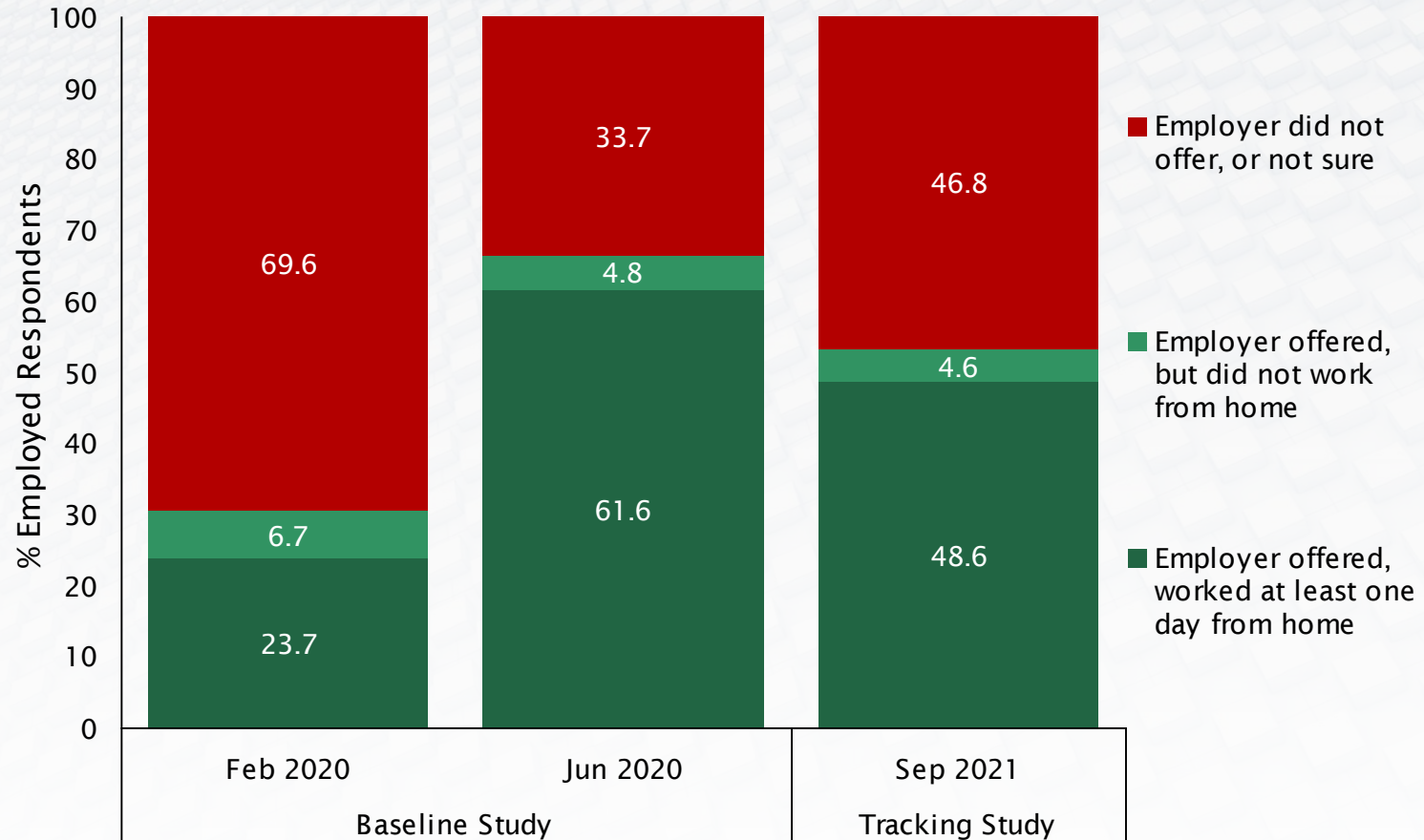
Telework Days Per Week



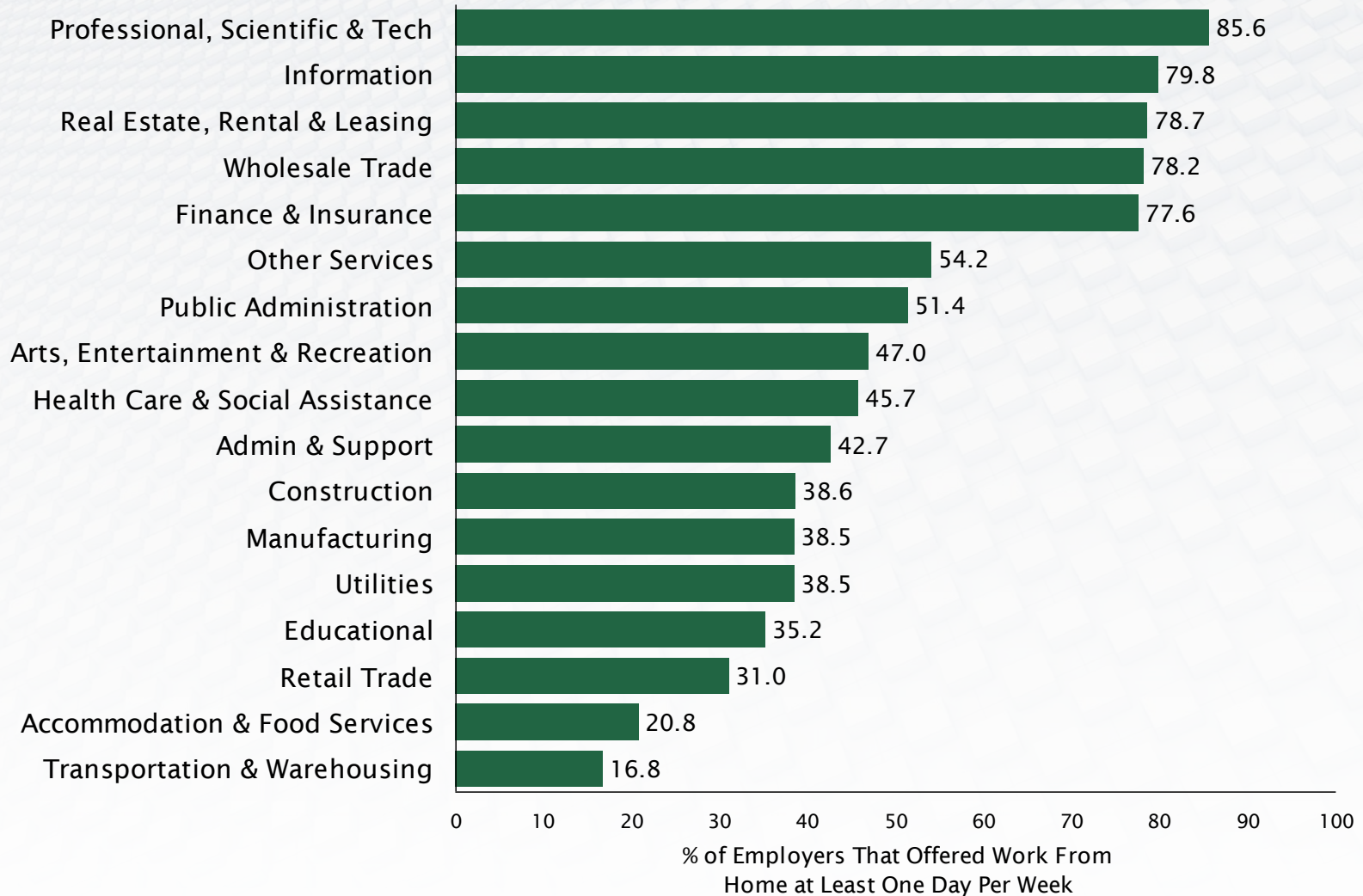
Work Commute Mode



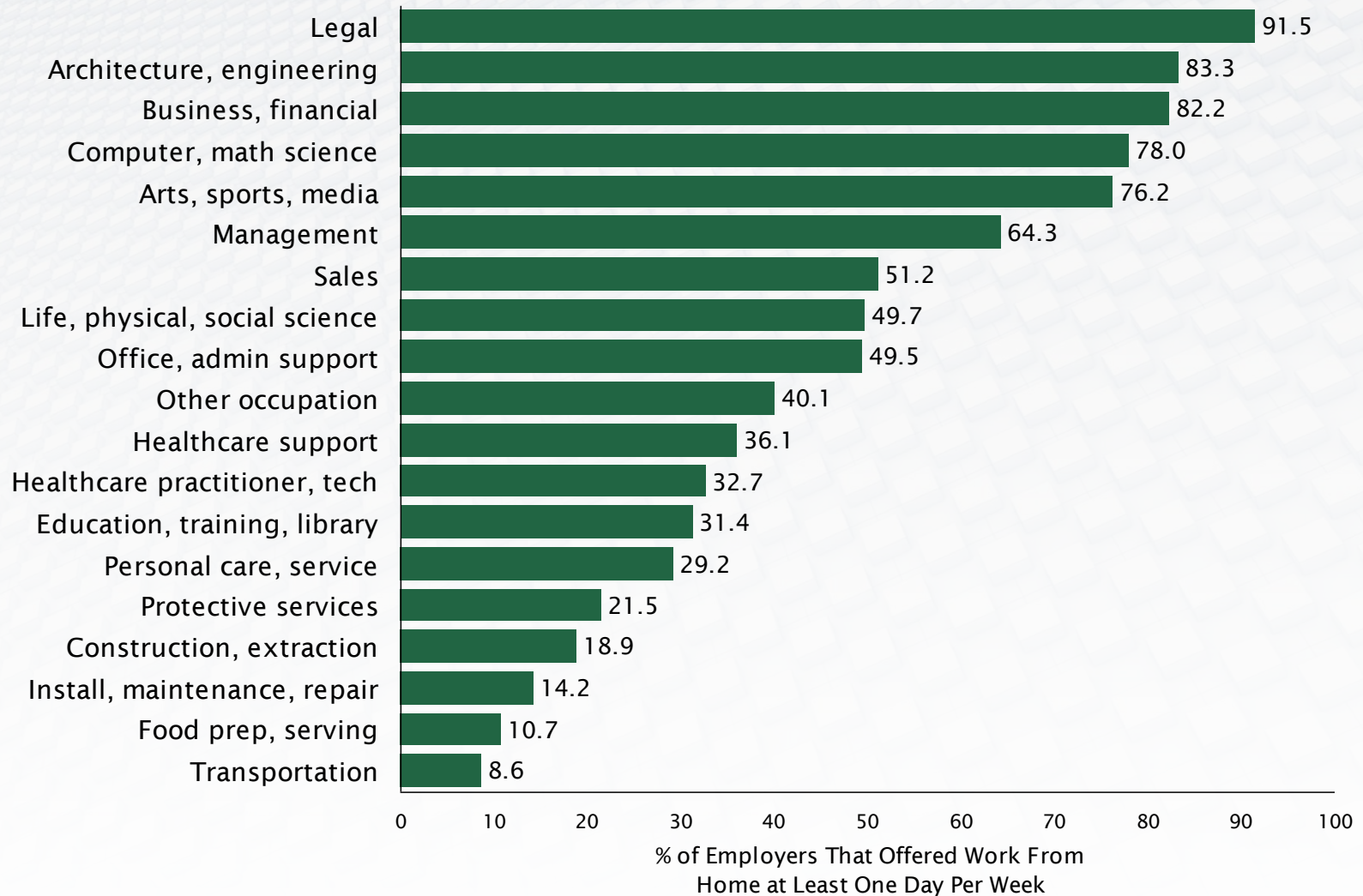
Telework Option



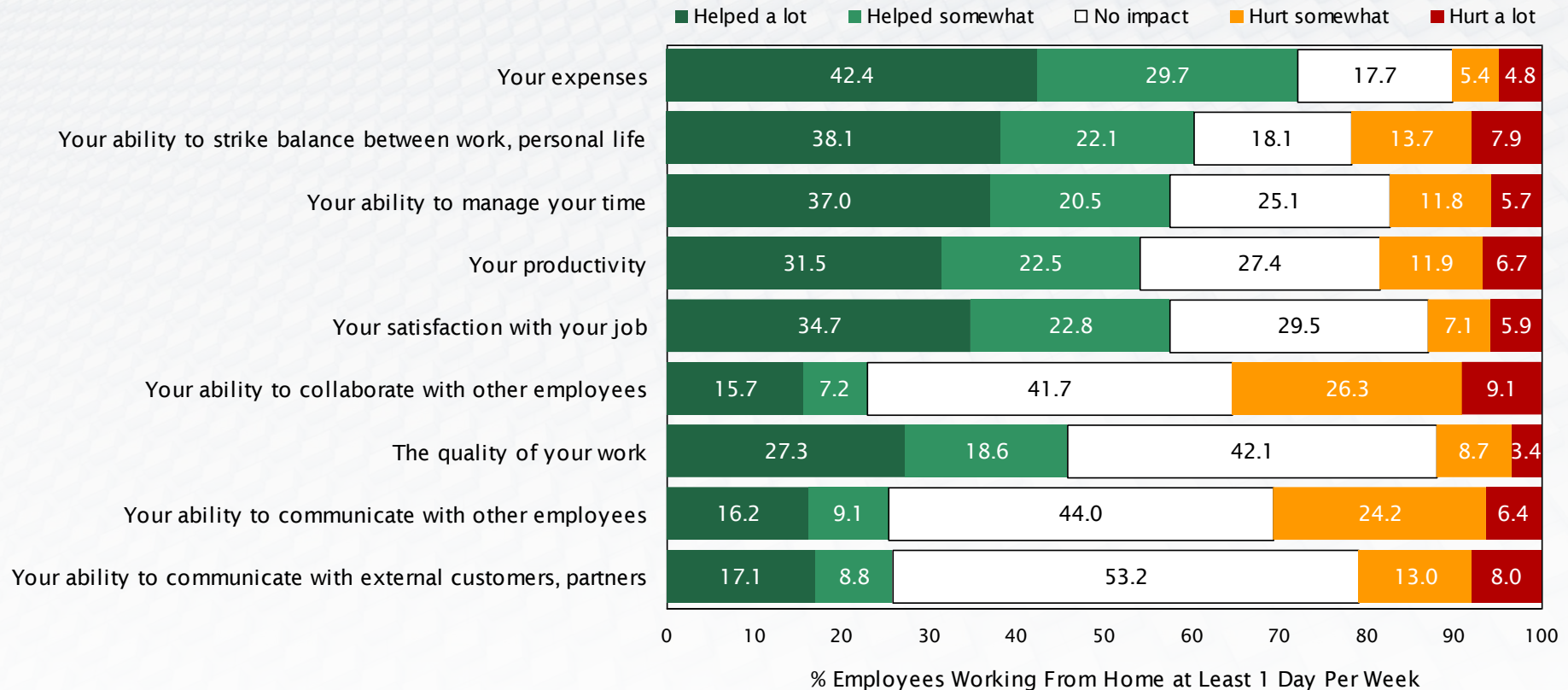
Telework Option by Industry



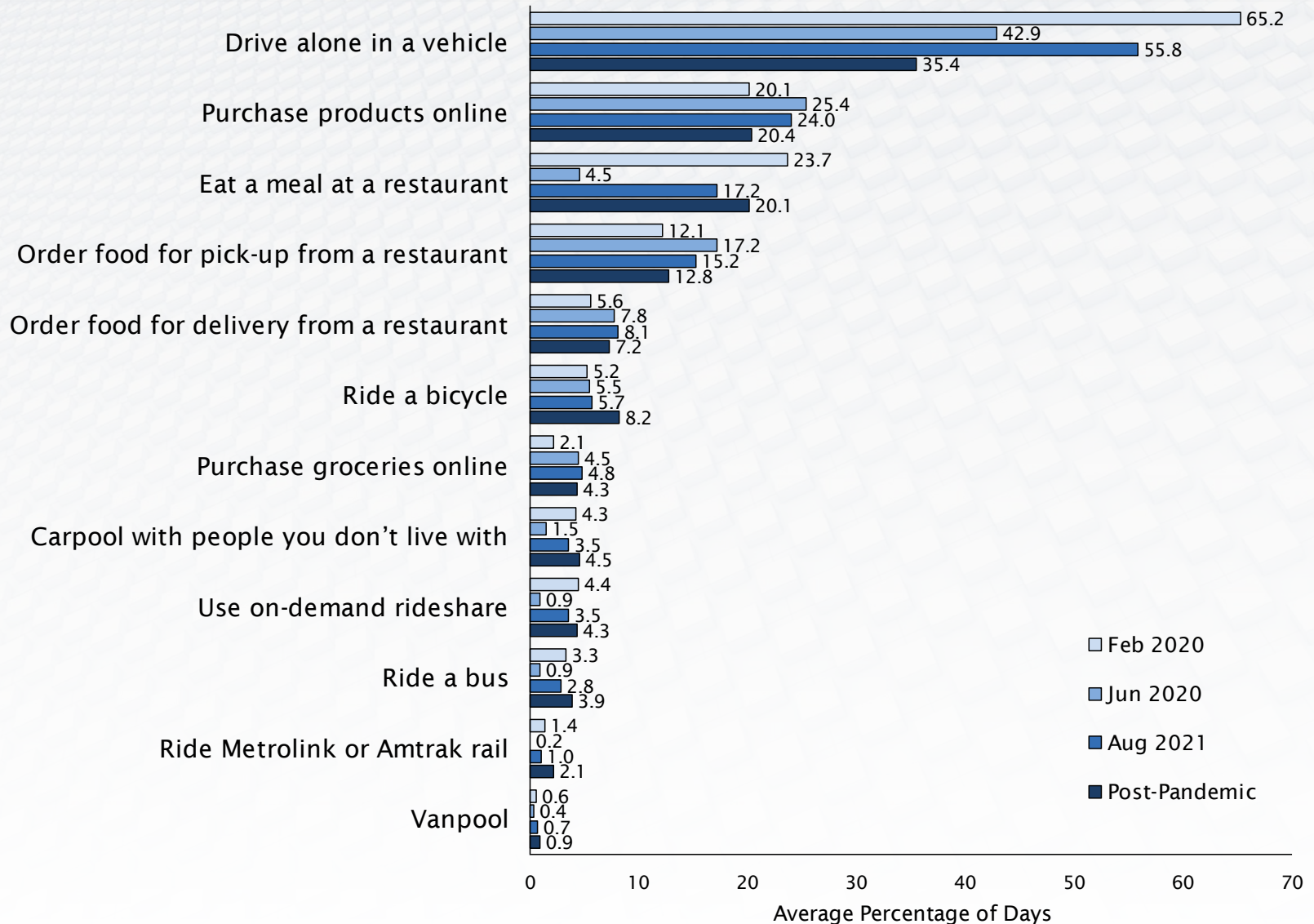
Telework Option by Occupation



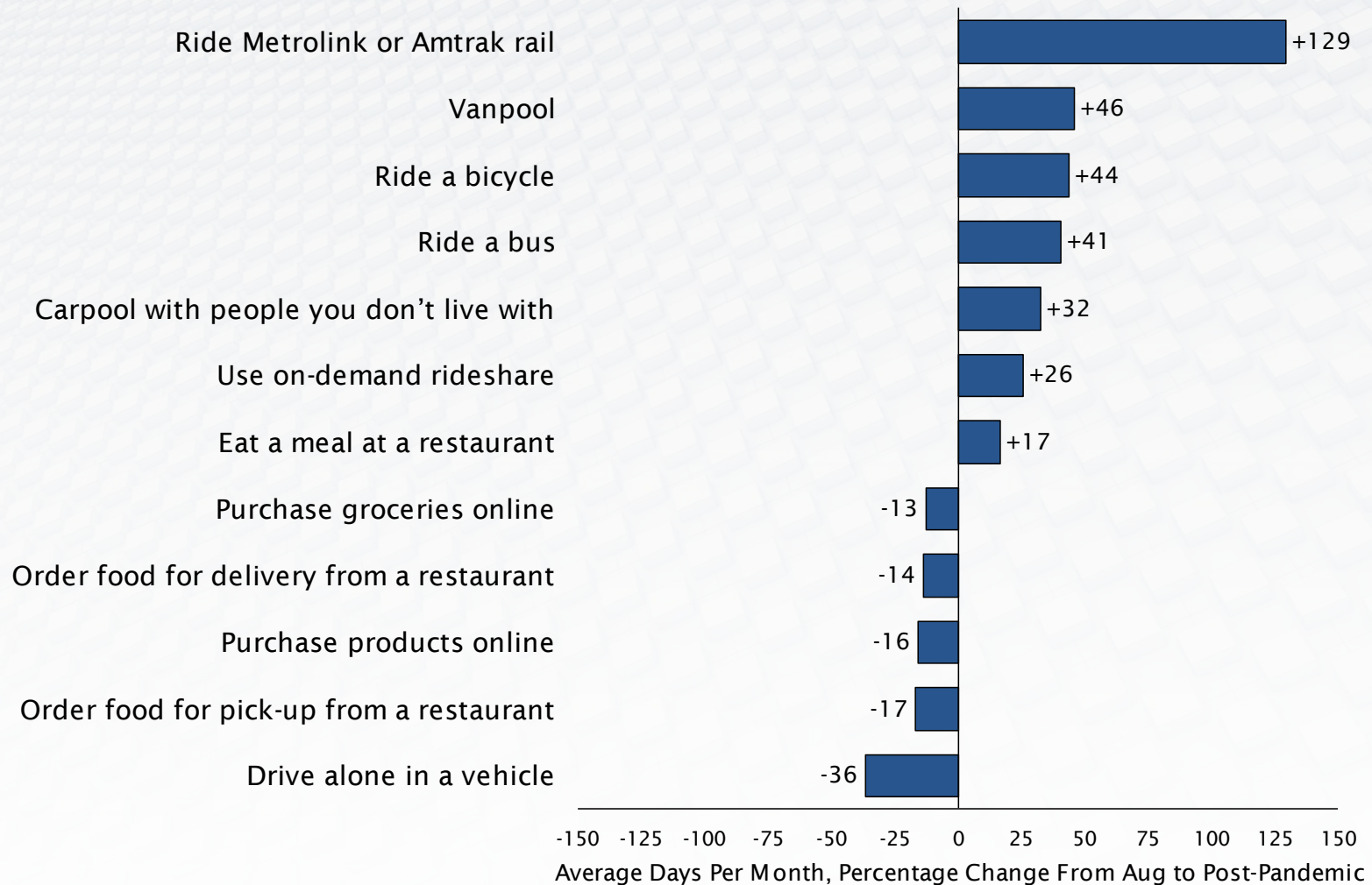
Impact of Working From Home



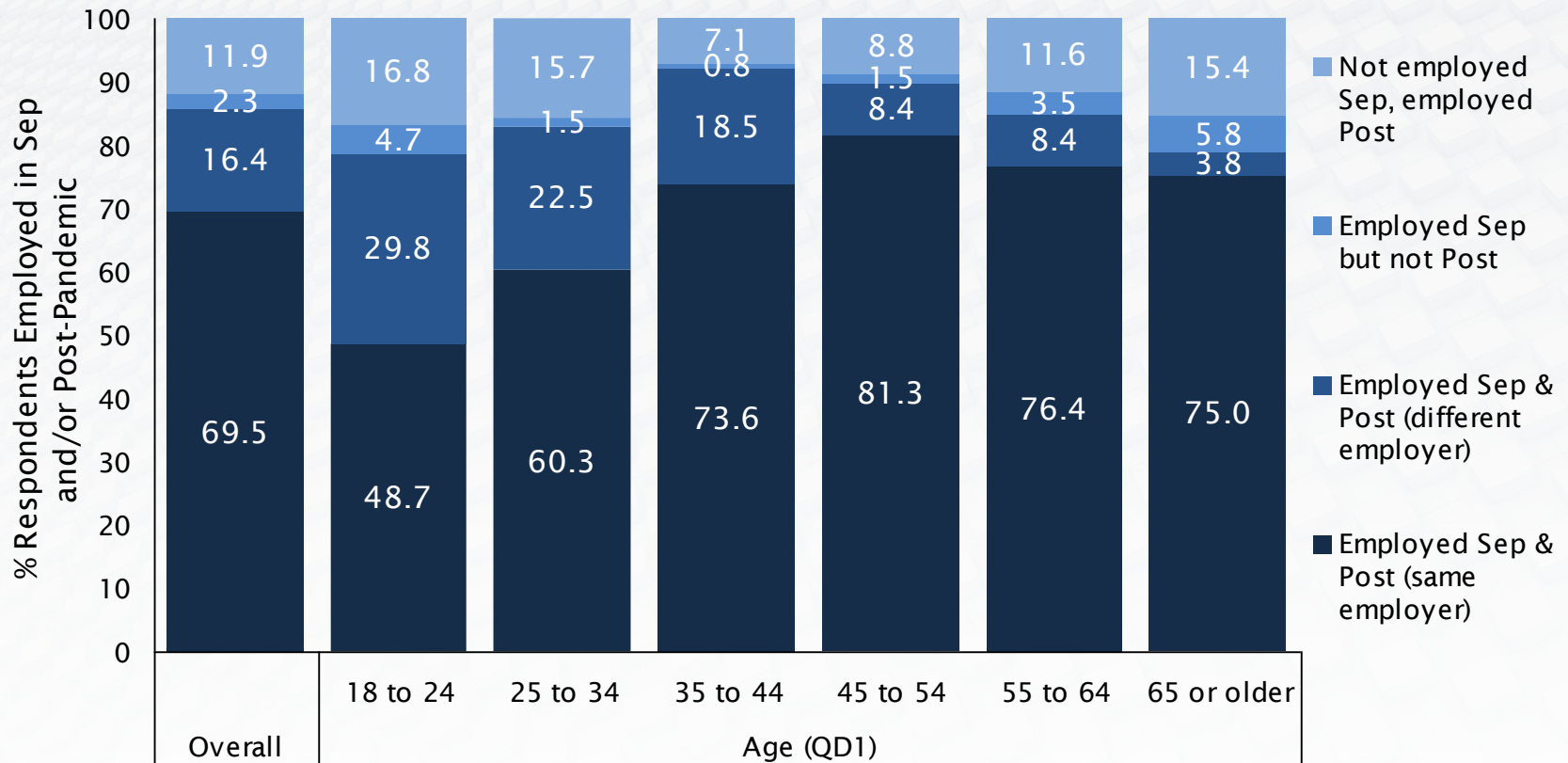
Percentage of Days Per Month Performing Activities



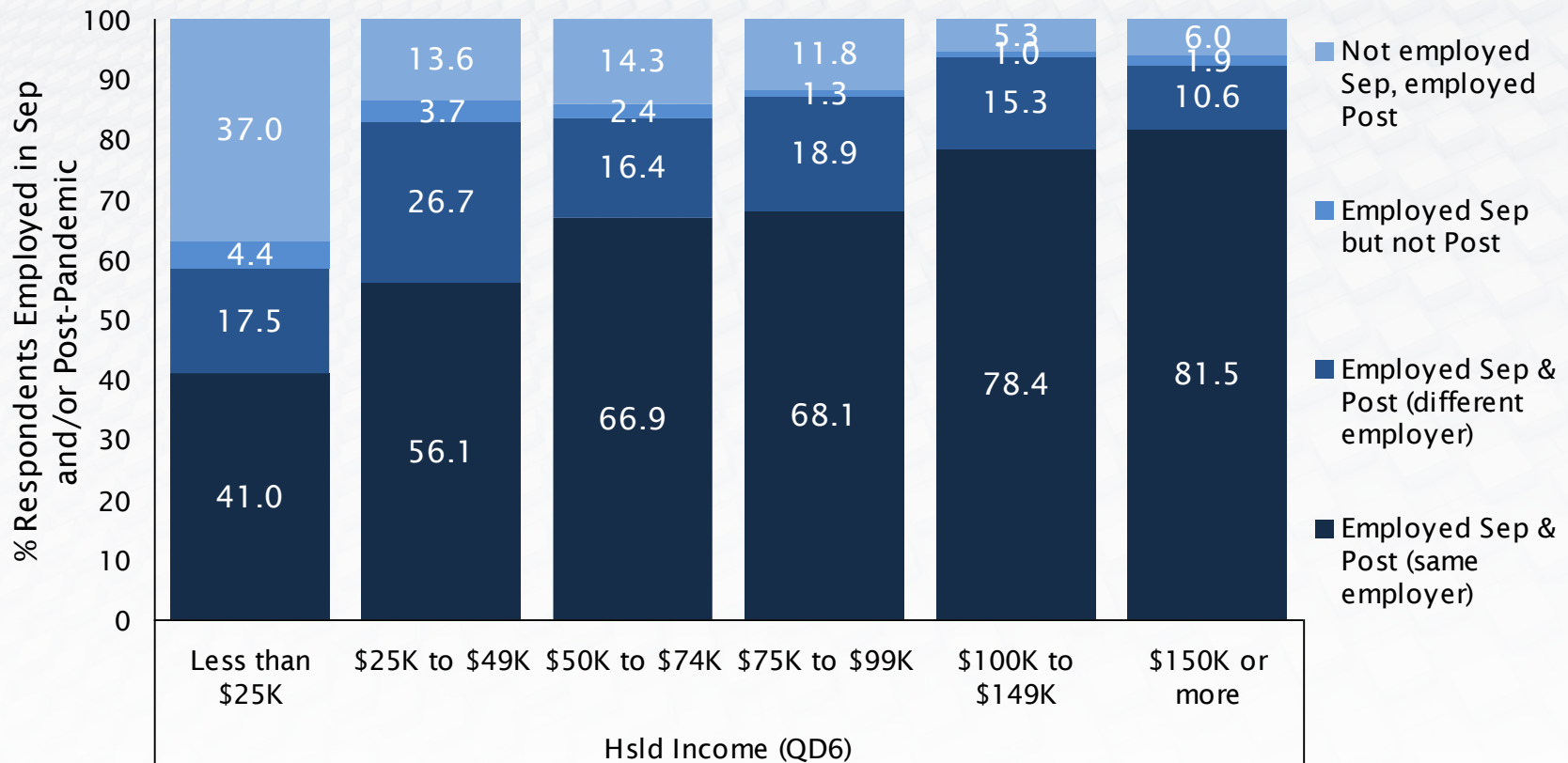
Percentage Change in Days Per Month Performing Activities: August 2021 vs Post-Pandemic



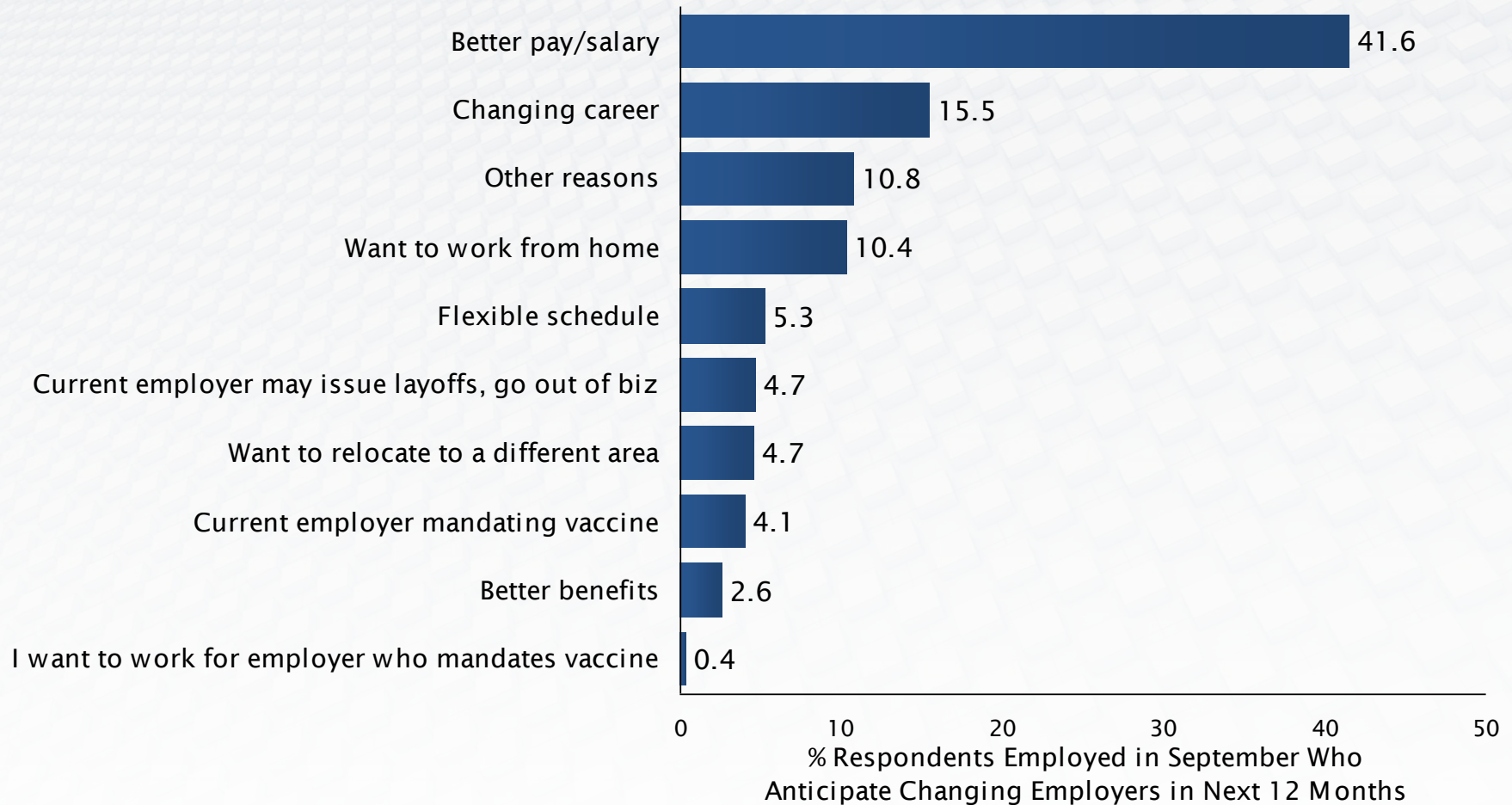
Change of Employers Next 12 Months



Change of Employers Next 12 Months by Household Income



Main Reason For Changing Employers



Key Takeaways

- **The COVID-19 pandemic had *dramatic* impacts on employment, working arrangements, and travel behavior in Orange County in early months**
 - Unemployment increased from 4 percent to 18 percent between February and June 2020.
 - Working from home increased from 0.76 days per week to 2.56 days per week for the *average* employee.
 - Working exclusively from home increased from 12 percent to 47 percent of employees.
 - Reductions in commute and non-work trips have resulted in large reductions in use of transit, active transportation, and rideshare.
 - Reductions in use of transit, active transportation, rideshare, and driving are occurring for a mix of reasons – higher unemployment, remote work, and fewer opportunities for non-work trips.

Key Takeaways (cont.)

- **Although the remote work tide has receded somewhat with vaccines and modified guidelines, it is expected to remain well above pre-pandemic levels**
 - The percentage of working from home 1+ days per week in September 2021 (48 percent) is well above pre-pandemic levels (23 percent), and is expected to remain above pre-pandemic levels even after the pandemic is over (44 percent).
 - The average number of days working from home in September 2021 (1.97) has more than double pre-pandemic levels (0.76), and expected to remain so (1.55) in the future.
 - Remote work is not evenly distributed by industry or occupation. White-collar professionals are far more likely than their blue-collar counterparts to have the option to work from home and do so.
 - On most dimensions, employees find remote work to be beneficial to their work experiences and their work-life balance.

Key Takeaways (cont.)

- **The trend back toward pre-pandemic commute, travel, activity patterns is expected to continue**
 - The percentage of employees driving alone to work increased to 60 percent in September 2021 and is expected to reach 69 percent once the pandemic is over (10 percent below pre-pandemic levels).
 - The percentage of employees who expect to commute by public transit, carpool or vanpool, active transportation, and other modes after the pandemic is over, is within 1 percent of pre-pandemic values.
 - Nearly all shopping, dining, and mode-use activities tested either returned to pre-pandemic levels by September 2021 or were expected to do so once the pandemic is over.
 - The notable exception is driving alone in a vehicle, which respondents expected to do less often post-pandemic.