



COVID-19 Market Research Employer Survey

Employer Survey Overview

GOAL:

To understand the impact of COVID-19 on employers, their anticipated approaches to new, complex workplace challenges and future business outlooks including opening for business, telecommuting, workforce size as well as transportation needs and priorities.

SURVEY TIMING: July 7 through August 8, 2020

SURVEY DISTRIBUTION: Online survey emailed to more than 300 employers in Orange County

- AQMD list – OC employers with 250+ employees
- OCBC – shared in eNewsletter

RESPONSES:

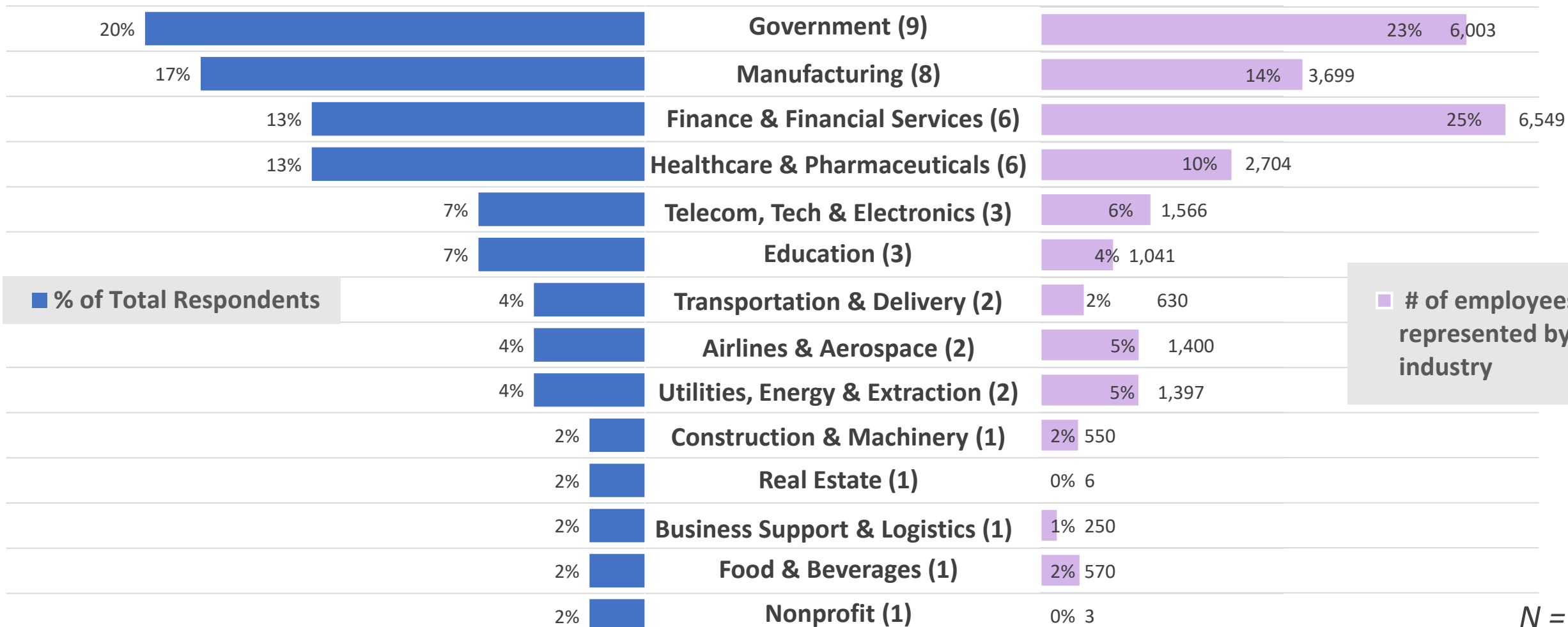
- 46 responses from 46 employers
- Represent ~26,000 employees

Participating Employers

| Business Industry | Business Name | City |
|--------------------------------------|--|-------------|
| Airlines & Aerospace (2) | Parker | Irvine |
| | Raytheon Technologies | Fullerton |
| Business Support & Logistics (1) | Enterprise Holdings | Santa Ana |
| Construction, Machinery, & Homes (1) | Fluor | Aliso Viejo |
| Education (3) | Cypress College | Cypress |
| | Vital Link Education-Business Consortium | Tustin |
| | UCI | Irvine |
| Finance & Financial Services (6) | Capital Group | Irvine |
| | Consumer Portfolio | Irvine |
| | Experian | Costa Mesa |
| | EY | Irvine |
| | Nordstrom | Irvine |
| | Schools First Federal Credit Union | Santa Ana |
| Food & Beverages (1) | Yum | Irvine |
| Government (9) | City of Anaheim | Anaheim |
| | City of Buena Park | Buena Park |
| | City of Costa Mesa | Costa Mesa |
| | City of Irvine | Irvine |
| | Newport Beach | Beach |
| | City of Newport Beach | Beach |
| | City of Orange | Orange |
| | Dept of Defense | Unknown |
| | Riverside County Transportation Commission | Unknown |
| State Gov | Unknown | |

| Business Industry | Business Name | City |
|--|--------------------------------|----------------|
| Healthcare & Pharmaceuticals (6) | Johnson & Johnson | Irvine |
| | Optum | Irvine |
| | Par Pharm | Irvine |
| | peregrineinc | Costa Mesa |
| | Prime Health Care | Anaheim |
| | St. Joseph Heritage Healthcare | Anaheim |
| Manufacturing (8) | Absolute Technologies | Yorba Linda |
| | B Braun Medical Inc | Irvine |
| | Herbalife | Lake Forest |
| | Kingston | Irvine |
| | Medtronic, Inc | Santa Ana |
| | Microvention | Aliso Viejo |
| | Ossur Americas | Ranch |
| | Unknown | Unknown |
| Nonprofit (1) | Junior Achievement of OC | Costa Mesa |
| Real Estate (1) | South Coast Metro | Santa Ana |
| Telecommunications, Technology, Internet & Electronics (3) | BROADCOM | Irvine |
| | Dynamic Health System | Santa Ana |
| | US.Fujitsu | Foothill Ranch |
| Transportation & Delivery (2) | Larry Seeman Associates | Irvine |
| | Unknown | Unknown |
| Utilities, Energy, and Extraction (2) | IRDW | Irvine |
| | Costa Mesa | Costa Mesa |

Employer Industry

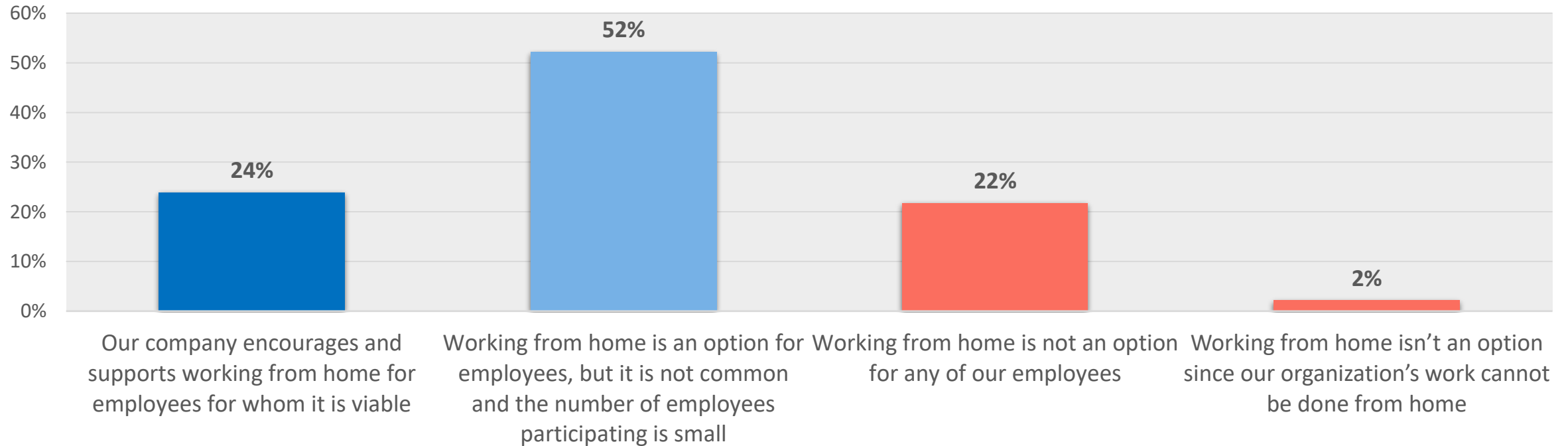


N = 46

Working From Home – Before COVID-19

Before COVID-19, 76% of companies had “Work from Home” (WFH) programs

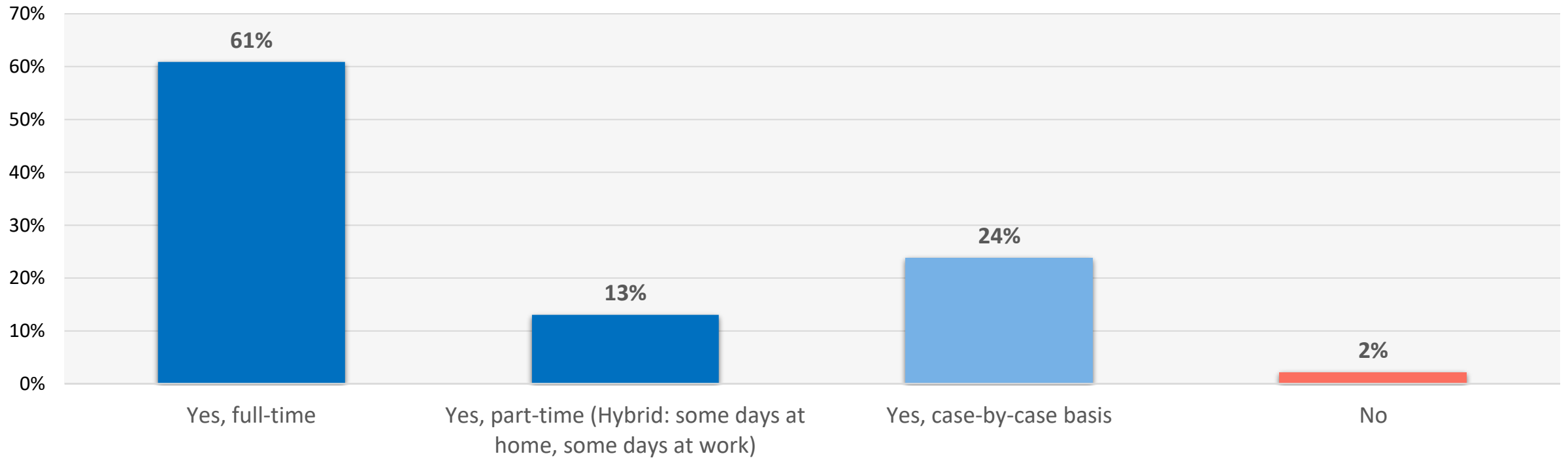
Prior to COVID-19, which of the following most accurately describes your company’s policy concerning employees working from home? (N = 46)



Working From Home – During COVID-19

During COVID-19, 98% now have WFH programs

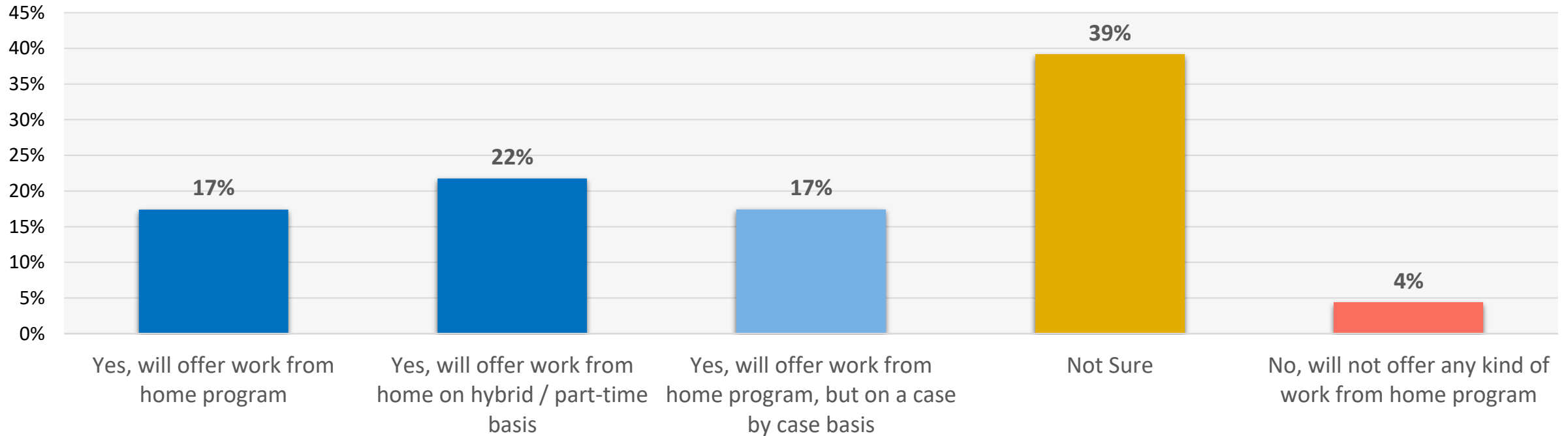
Has your company offered a work from home program during COVID-19?
(N = 46)



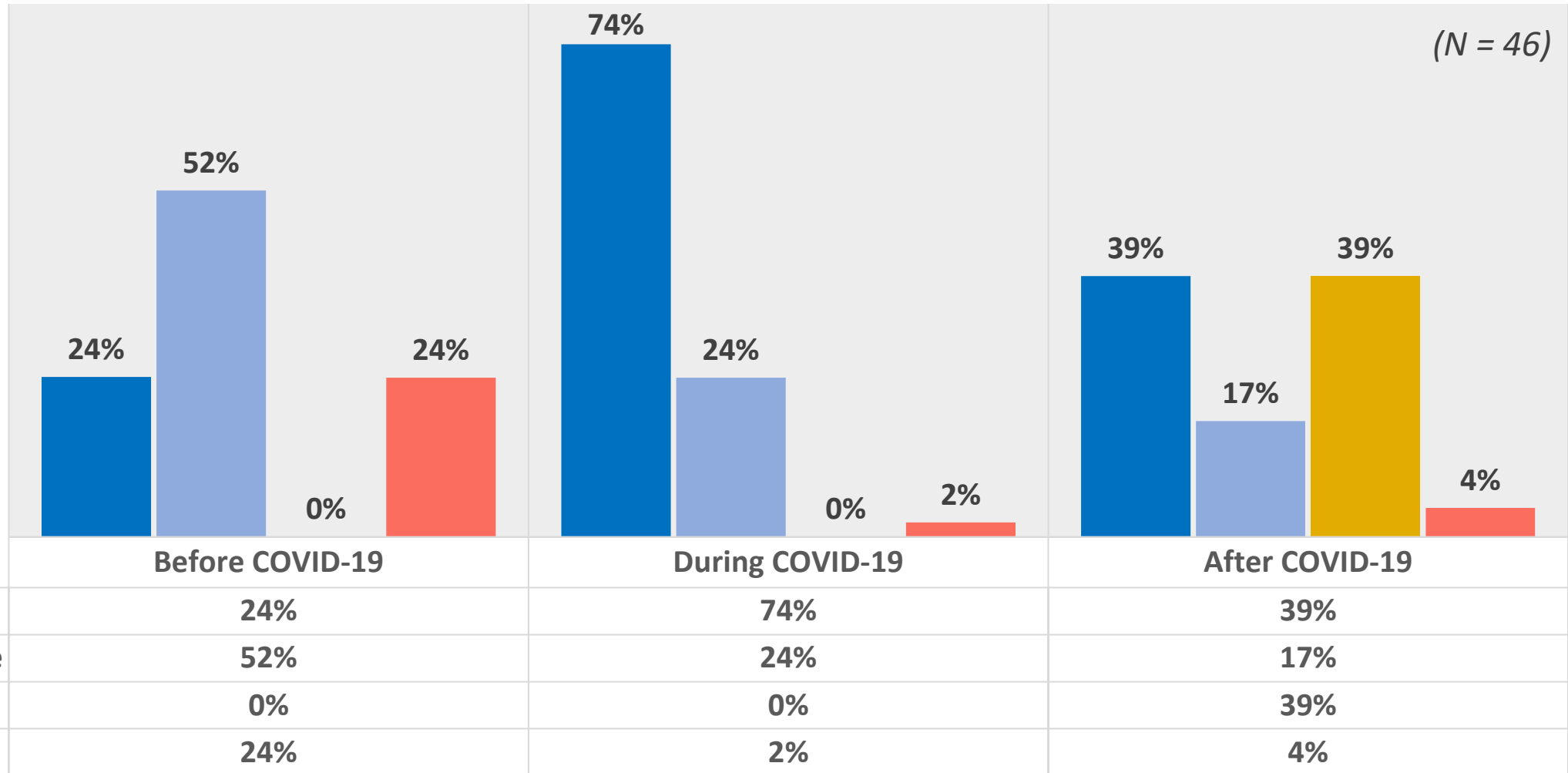
Working From Home – After COVID-19

After COVID-19, 57% plan for WFH in some forms

In the future (post COVID-19), will your company offer a permanent work from home program?
(N = 46)

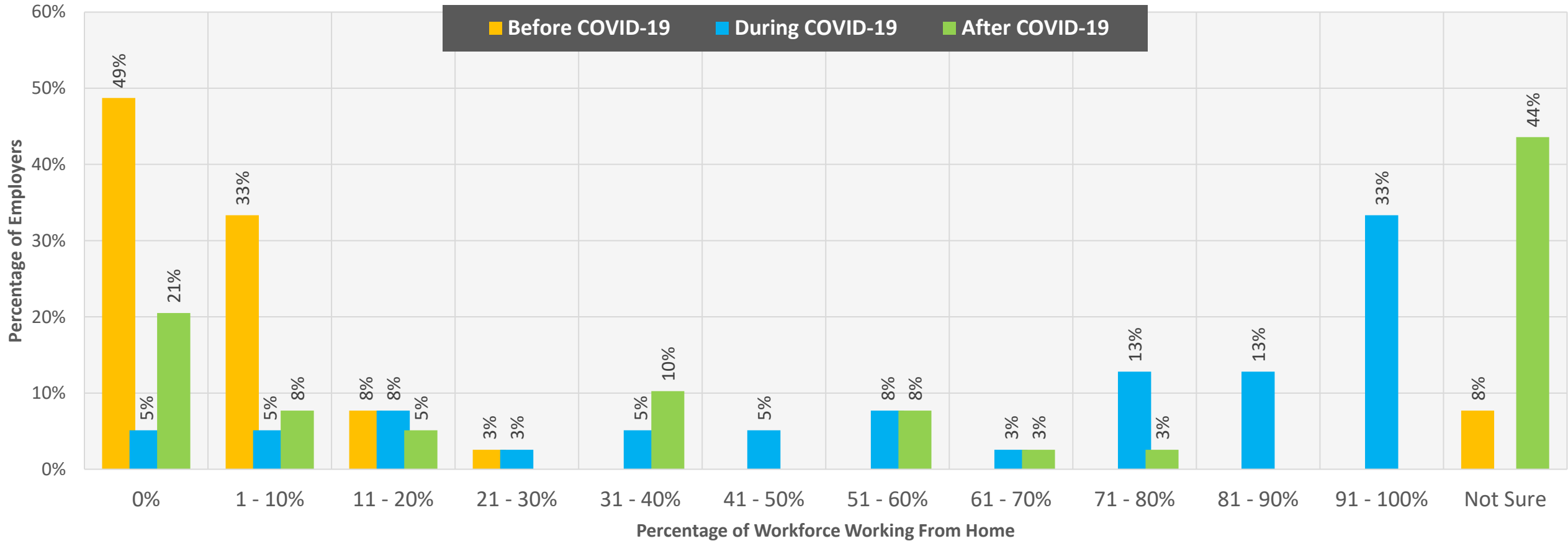


WFH Program Comparison



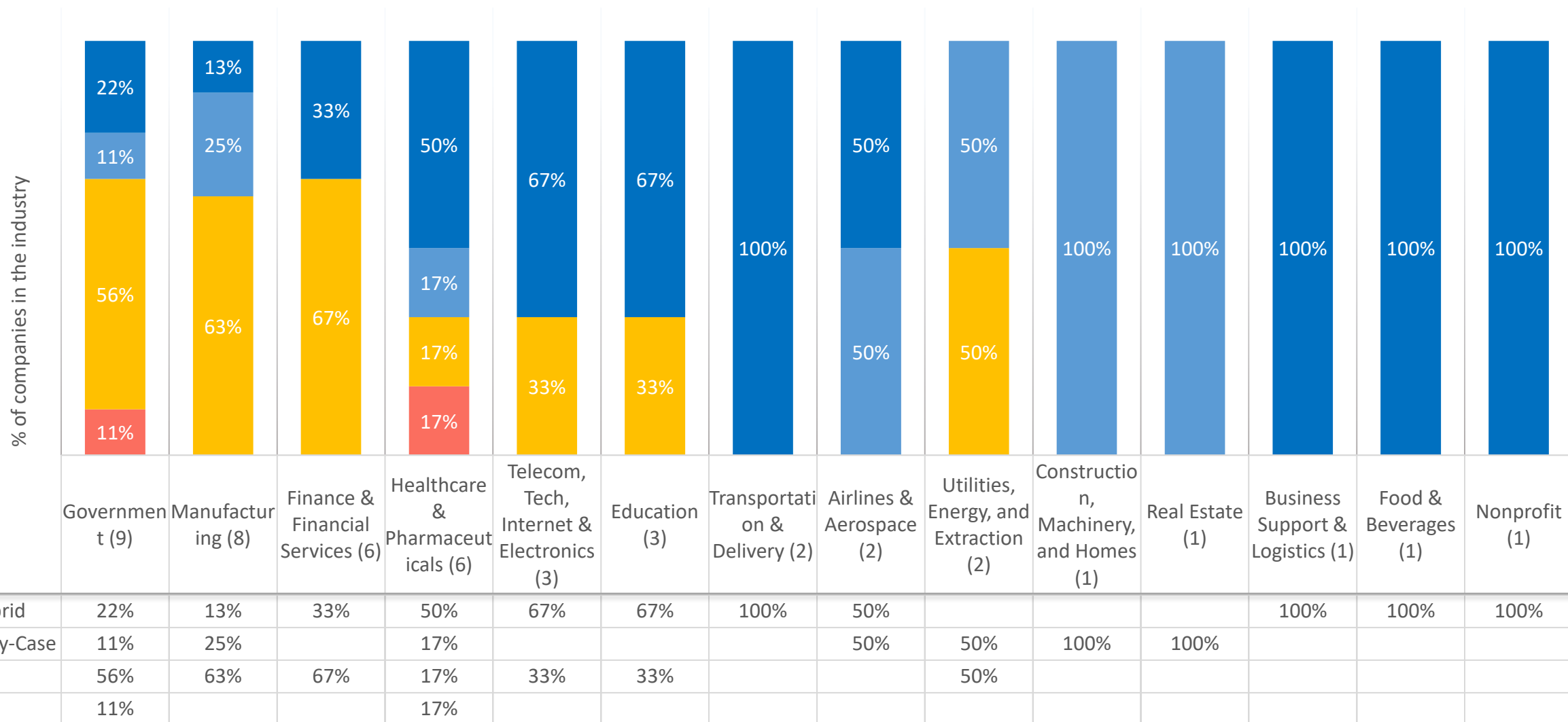
% Of Workforce Working From Home

Please estimate the percentage of your company's workforce telecommuting before, during COVID-19 and permanently going forward post COVID-19. (N = 39)



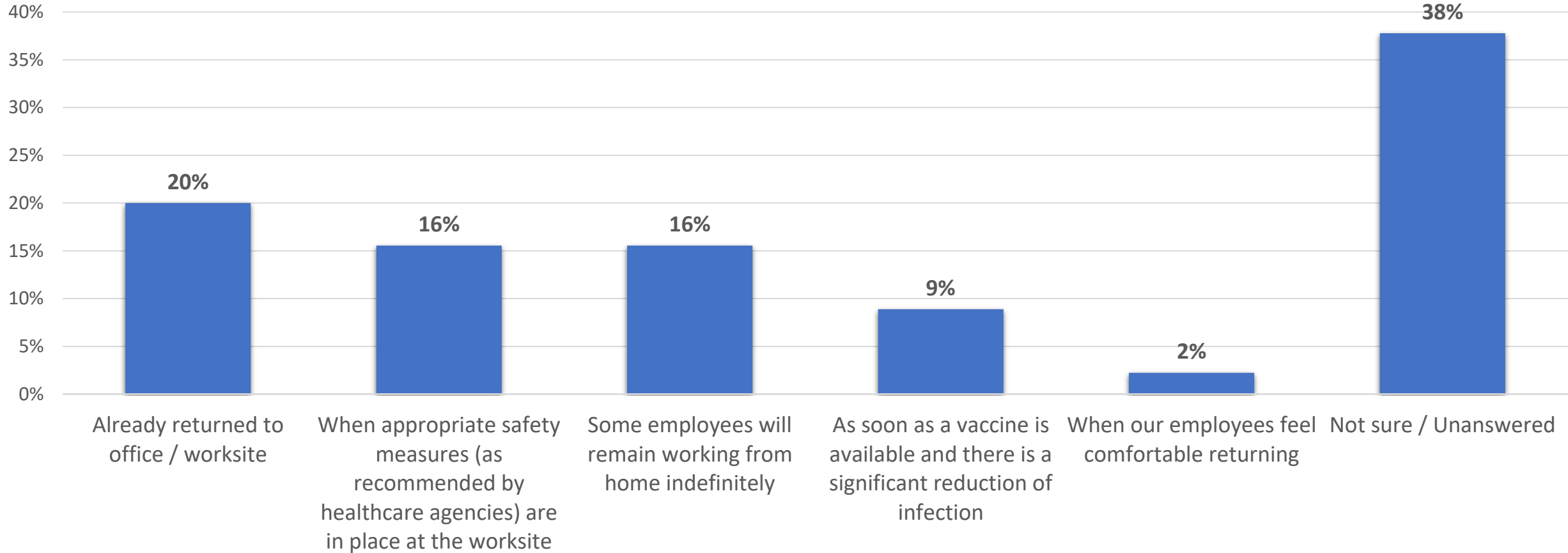
Permanent WFH By Industry

In the future (post COVID-19), will your company offer a permanent work from home program?
(N = 46)



Returning To Work

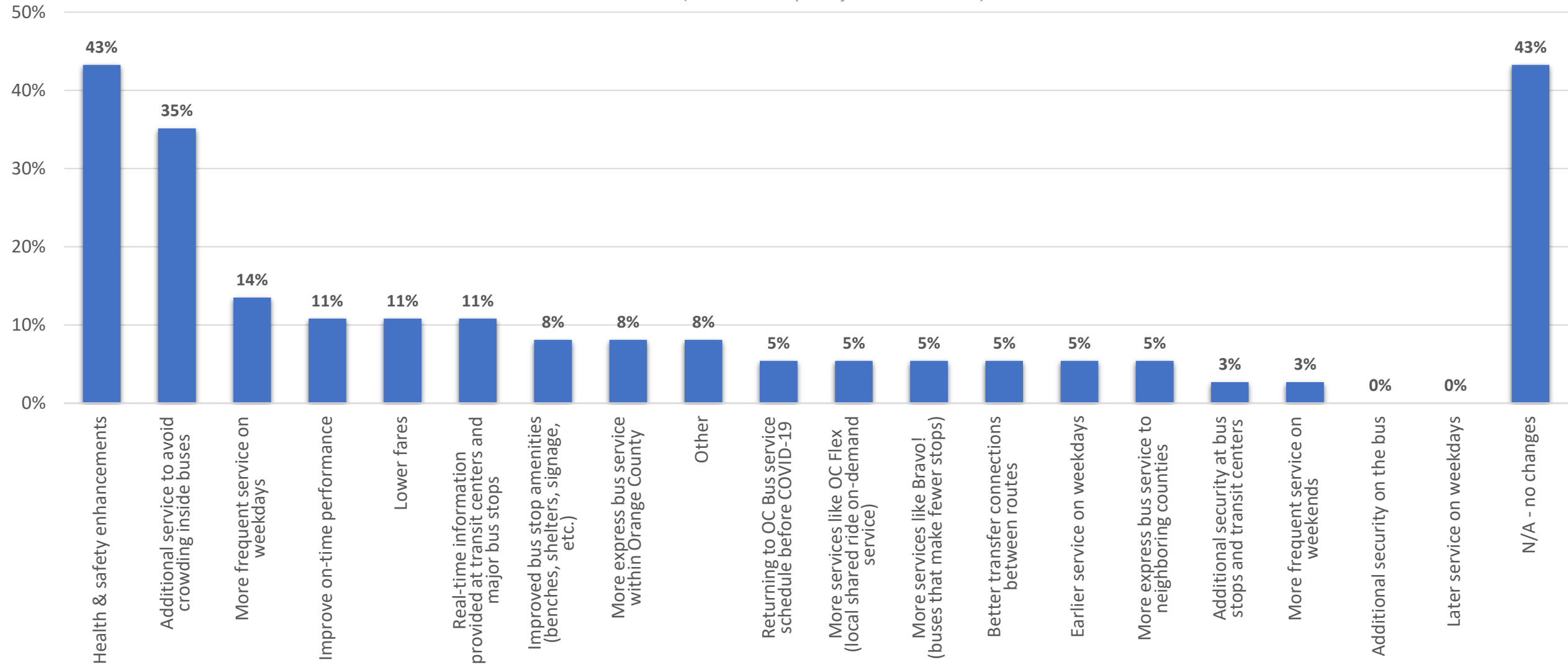
If your employees were working from home during COVID-19, when does your company plan on returning to the office? (N = 45)



Potential Improvements

Are there any changes that might encourage your employees to use the OC bus service or ride more often? (N = 37)

(Please select up to 5 from the list below)



Key Takeaways

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Employer WFH practices have changed significantly **during the COVID-19** pandemic, with **98 percent of employers having some form of WFH program**, compared to 76 percent prior to COVID-19.

While **many employers are still undecided** (39 percent), indications are that this will be a sustained change, as **more than half of employers (56 percent) are planning for WFH after COVID-19**.

The proportion of **employers planning full-time or hybrid WFH programs after COVID-19 increased by 15 percent** compared to prior to COVID-19.

- Increases in terms of participating employees may be even larger. Many employers (52 percent) reported WFH programs prior to COVID-19 had very low participation / few employees.

Key Takeaways

When employees will return to the office / worksite:

- 38 percent of employers are unsure
- 25 percent saying they will return with either additional office safety measures or the availability of a COVID-19 vaccine
- 20 percent have already returned
- 16 percent will continue to work from home indefinitely

In order to encourage OC Bus ridership after COVID-19 among employees, **respondents requested COVID-19 related health and safety improvements**. From a range of possible service elements, the top two selections were **Health and safety enhancements (43 percent)** and **additional service to avoid crowding (35 percent)**.