



EMPLOYMENT & TRAVEL SURVEY
SUMMARY REPORT ON PANDEMIC IMPACTS

PREPARED FOR
OCTA



DECEMBER 14, 2021



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INTRODUCTION

The arrival of coronavirus in California triggered a statewide shelter-in-place mandate in March 2020, effectively shuttering many sectors of the world's fifth largest economy for several months and sending ripple effects through most aspects of daily life. In addition to the direct economic impacts including job losses, salary cuts, and reduced spending, the threat of COVID-19 and the closure of non-essential businesses dramatically altered how and where people work, play, shop, and travel. Although the State began a phased reopening of the economy several months later, public health restrictions remained throughout 2020 and into 2021, and many businesses and employees found themselves forced to operate under altered work arrangements. Within four months of the pandemic's arrival, full-time employment in Orange County declined by 9%, the number of employees who worked from home at least one day per week jumped from 23% to 61%, and the average number of days worked from home among *all* employees increased from 0.76 to 2.52 per week. The pandemic also prompted dramatic changes in travel behavior, with Orange County residents reporting significant reductions in the number of days they drive alone, carpool, or use public transit.¹

Although the widespread availability of COVID-19 vaccines and relaxation of public health guidelines in 2021 has allowed many workers the *option* to return to the office, questions remain as to what percentage of workers have done so, how they are commuting, and whether they anticipate these patterns will change once the pandemic is over. The answers to these questions are highly relevant to OCTA's mission to develop an integrated and balanced transportation system that supports the diverse travel needs and reflects the character of Orange County.

MOTIVATION FOR RESEARCH The purpose of the study described in this report was to develop a statistically reliable understanding of how public attitudes, working arrangements, travel behaviors, and mode choice have been altered over the course of the pandemic, as well as how these patterns are likely to change once the pandemic is over. This tracking survey represents the second in the study. A baseline survey (presented to OCTA in August 2020) profiled work arrangements, travel behavior, and relevant activities among Orange County residents prior to the pandemic (January & February 2020) and several months into the pandemic (June 2020) to document changes. The tracking survey conducted in September 2021 captured the same information for the *current* period, as well as respondents' expectations for the post-pandemic period.

Specifically, the tracking survey was designed to:

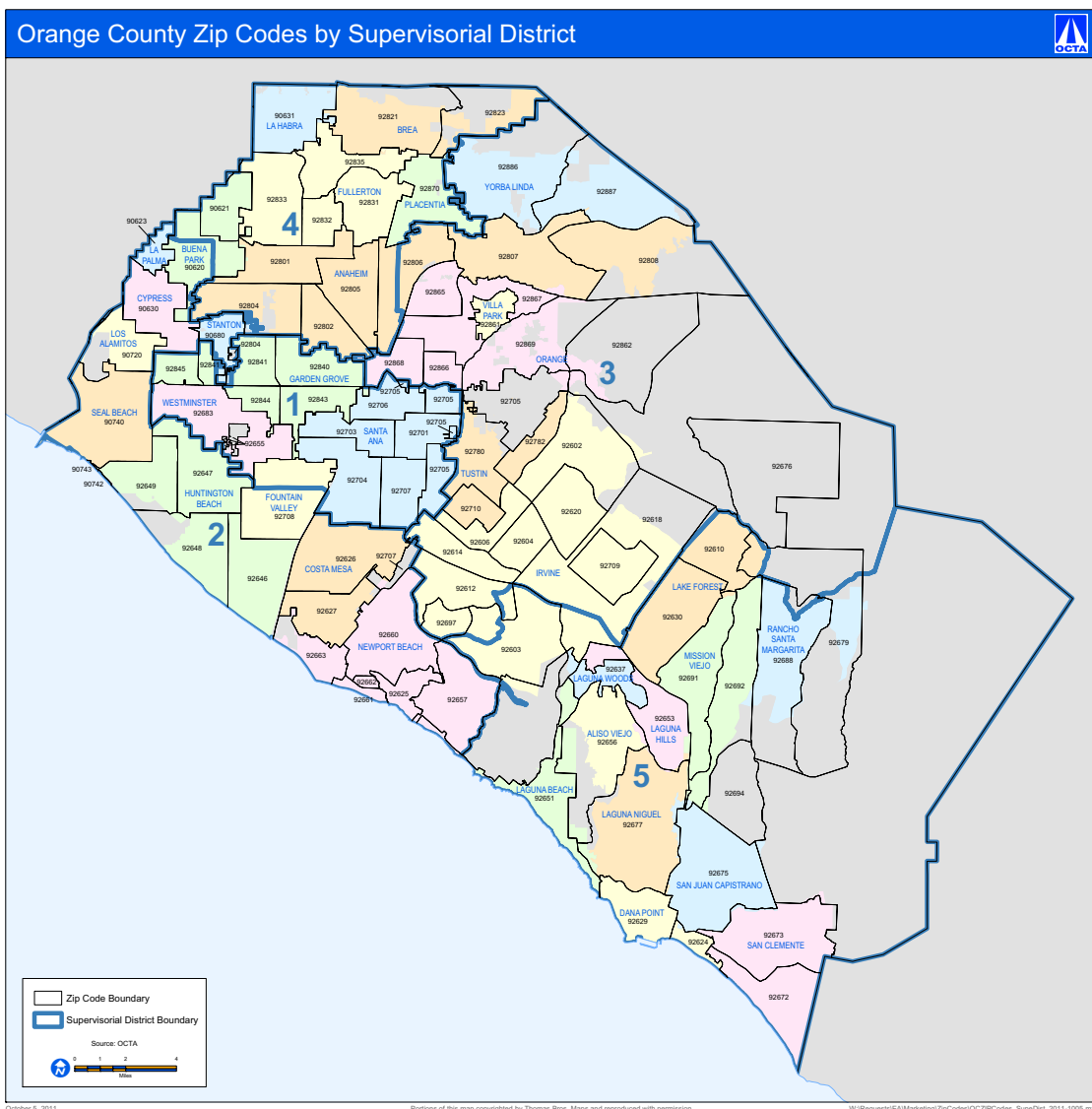
- Identify the issues that residents view as the most important facing Orange County today
- Gauge residents' expectations for the coronavirus pandemic
- Profile their employment status, work schedule, frequency of remote work, and commute behavior in September 2021 and expectations for the post-pandemic period
- Profile their use of rideshare, transit, and active transportation, as well as their shopping and dining habits in September 2021 and expectations for the post-pandemic period

1. Source: *Employment and Travel Survey: Summary Report on Pandemic Impacts*, report prepared for OCTA by True North Research, August 12, 2020.

- Among employees who work from home, gauge the impacts of doing so on their work experiences and performance

OVERVIEW OF METHODOLOGY A full description of the methodology used for this study is included later in this report (see *Methodology* on page 39). In brief, a total of 2,119 randomly selected Orange County adult residents participated in the tracking survey between September 2 and September 26, 2021.² The survey followed a mixed-method design that employed multiple recruiting methods (email, text and telephone) and multiple data collection methods (telephone and online). The interviews averaged 15 minutes in length and were conducted in English, Spanish, and Vietnamese. The results presented in this report are representative at the countywide level, as well as within the five Supervisorial Districts identified in Figure 1.

FIGURE 1 MAP OF SUPERVISORIAL DISTRICTS AND ZIP CODES



2. A total of 4,667 interviews were completed between the baseline survey (August 2020) and tracking survey.

ORGANIZATION OF REPORT This report is designed to meet the needs of readers who prefer a summary of the findings as well as those who are interested in the details of the results. For those who seek an overview of the findings, the section titled *Key Findings* is for you. It provides a summary of the most important factual findings of the surveys and a discussion of their implications. For the interested reader, this section is followed by a more detailed question-by-question discussion of the results from the surveys by topic area (see *Table of Contents*), as well as a description of the methodology employed for collecting and analyzing the data (see *Methodology* on page 39). And, for the truly ambitious reader, the questionnaire used for the interviews is contained at the back of this report (see *Questionnaire & Toplines* on page 42), and a complete set of crosstabulations for the tracking survey results is contained in Appendix A, which is bound separately.

Where appropriate, the results of the baseline survey (August 2020) have been incorporated into graphics and analyses in this report alongside data collected in the tracking survey to provide a more complete picture of how employment arrangements, travel behavior, and activities have changed over the trajectory of the pandemic.

ACKNOWLEDGMENTS True North thanks OCTA for the opportunity to assist the agency with this important study, especially Alice Rogan, Kurt Brotcke, and Darrell Johnson. Their collective expertise, local knowledge, and insight improved the overall quality of the research presented here.

DISCLAIMER The statements and conclusions in this report are those of the authors (Dr. Timothy McLarney and Richard Sarles) at True North Research, Inc. and not necessarily those of OCTA. Any errors and omissions are the responsibility of the authors.

ABOUT TRUE NORTH True North is a full-service survey research firm that is dedicated to providing public agencies with a clear understanding of the values, perceptions, priorities, and concerns of their residents and customers. Through designing and implementing scientific surveys, focus groups, and one-on-one interviews, as well as expert interpretation of the findings, True North helps its clients to move with confidence when making strategic decisions in a variety of areas—such as planning, policy evaluation, performance management, organizational development, establishing fiscal priorities, and developing effective public information campaigns.

During their careers, Dr. McLarney (President) and Mr. Sarles (Principal Researcher) have designed and conducted over 1,000 survey research studies for public agencies, including more than 400 studies for California municipalities, special districts, and transportation planning agencies.



KEY FINDINGS

This study was designed to provide OCTA with a statistically reliable understanding of how Orange County residents' attitudes, working arrangements, travel behaviors, and activities were altered over the course of the pandemic, as well as how these patterns are likely to change once the pandemic is over. Whereas subsequent sections of this report are devoted to conveying the detailed results of the survey, in this section we attempt to 'see the forest through the trees' and note how the collective results of the survey answer some of the key questions that motivated the research.

Is the coronavirus pandemic still top-of-mind for Orange County residents?

When asked in June 2020 to identify the *most* important issue facing Orange County, the coronavirus pandemic/COVID-19 naturally topped the list, being mentioned by more than one-third (34%) of respondents. The next nearest specific issues were homelessness (12%), housing availability/affordability (7%), traffic congestion (6%), and public safety/drugs/crime (5%).

Residents' concerns about the coronavirus in June 2020 were driven, in part, by what they saw as the pandemic's trajectory in Orange County moving forward. Nearly two-thirds of respondents (63%) were pessimistic about the coronavirus outbreak in Orange County at the time, anticipating that the worst is yet to come. Approximately 20% were optimistic, feeling that the worst is behind us. The remaining respondents were either uncertain (16%) or preferred to not share their opinion (1%).

By September 2021, Orange County residents were far more optimistic about the path of the pandemic, with 53% feeling that the worst is behind us, 21% anticipating the worst is yet to come, and the remainder being unsure (25%) or unwilling to share their opinion (1%). Although still top of mind for many residents, the pandemic was no longer viewed as the most important issue facing the County, being replaced by homelessness (23%) and concerns about housing availability/affordability (15%) at the top of the list. Just 12% of respondents in the tracking survey identified the pandemic/COVID-19 as the most important issue facing Orange County today.

How has the pandemic impacted Orange County residents' employment?

Consistent with the sharp increase in unemployment recorded statewide during the months of April, May and June 2020 in response to the pandemic,³ the baseline survey results revealed that Orange County residents experienced significant job losses between February and June, 2020. Full-time employment declined 9% during this period, with additional declines in part-time employment (-1%) and self-employment (-1.6%). Meanwhile, the percentage of individuals surveyed who were

3. According to the California Employment Development Department (EDD), the unemployment rate in California jumped from 4.2% in February to 15.5% in April 2020, reached 16.4% in May 2020, and tapered to 14.9% in June 2020.

unemployed/looking for work, laid-off, or furloughed increased from 4% to 18% between February and June, 2020.

In addition to the net loss of jobs noted above, there were other less obvious impacts that occurred in the first few months of the pandemic. Among those who remained employed, the number of days worked per week declined from 4.95 days on average in February 2020 to 4.73 days per week in June 2020. Approximately 4% of individuals who were employed in February *and* June were also compelled to switch employers in the interim, with young adults (18 to 24) and those in households earning less than \$25,000 annually being the most likely to have switched employers during this period.

More than a year later (September 2021), the tracking survey indicates that although employment has rebounded in Orange County from the early months of the pandemic, it remains depressed when compared to pre-pandemic levels. Sixty-four percent (64%) of respondents in the tracking survey indicated they were employed full-time (48%), part-time (9%), or self-employed (8%), compared to 71% in February 2020.

The current patterns notwithstanding, Orange County residents anticipated that their levels of employment will return to pre-pandemic levels once the pandemic is over, with 56% expecting to work full-time, 9% part-time, and 7% self-employed during the post-pandemic period. Just as they were the most likely to suffer unemployment in the early months of the pandemic, younger adults and those in low-income households were also the most likely to anticipate a positive change in their employment status once the pandemic is over.

How has the pandemic impacted where employees work?

Concerns about COVID-19 transmission in the work place and guidelines issued by the State of California and the Centers for Disease Control and Prevention (CDC) prompted many Orange County businesses to shift to a remote working model when the pandemic struck, with employees working from home rather than coming to a central work site. This study not only confirms there has been a dramatic shift in *where* business is being conducted in Orange County, it also indicates that the tide of remote work witnessed in 2020 has ebbed only modestly in 2021 and is expected to remain at an elevated level even after the pandemic is over.

Prior to the pandemic in February 2020, less than one-quarter (23%) of employed Orange County residents indicated they worked from home at least one day per week, which translated to an overall average of 0.76 days per week working from home per employee. Four months later in June 2020, 61% of employed residents reported that they worked from home at least one day per week, and the average number of days working from home per employee had jumped to 2.52 per week.

Although the widespread availability of COVID-19 vaccines and relaxation of public health guidelines in 2021 has allowed many workers the *option* to return to the office, the tracking survey indicates that only a modest percentage have decided to do so. Reporting on their work arrangements in September 2021, 48% indicated that they worked from home at least one day per week, with the average number of days worked from home per week among all employees being 1.97—not far below the 2.52 reported in June 2020. Even after the pandemic is over, the percentage of employees who anticipate working from home at least one day per week (44%) is double pre-pandemic levels, as is the expected average number of days worked from home per week (1.55).

Which industries and occupations are working remotely?

The transition to remote work in Orange County has not been consistent across industries or occupations. Certain industries such as professional, scientific & technology, information, real estate, rental & leasing, wholesale trade, and finance & insurance apparently lend themselves to working from home, with three-quarters or more of employees surveyed in these industries indicating that their employers currently give them the option to work from home. At the other end of the spectrum, less than four-in-ten employees in industries that generally require in-person services or labor such as transportation & warehousing, accommodation & food services, retail trade, education, utilities, manufacturing, and construction reported that their employer currently gives them the option to work from home at least one day per week.

Similarly, remote work patterns varied dramatically across occupations in September 2021, with far more office professionals reporting that their employers allow them the option to work from home when compared to those working in positions that require manual or skilled labor. At the extremes, more than eight-in-ten employees working in legal, architecture and engineering, and business and financial positions reported that their employer allows them to work from home, compared to less than 15% of employees in transportation, food preparation and serving, and install, repair and maintenance positions.

How has working from home impacted employees' work experiences and lives?

Employees who currently work at home at least one day per week were generally positive when asked how remote work has impacted various aspects of their job performance and their personal lives. Indeed, for all but two dimensions tested, the percentage of employees who felt that remote work had helped was substantially higher than the percentage who felt it had hurt. The largest *net* positive outcomes were reported for the impacts of remote working on their expenses, job satisfaction, ability to manage their time, and ability to strike a balance between work and their personal life. To a lesser degree, remote work was also generally viewed to have a net positive impact on the quality of their work and their ability to communicate with external customers and partners.

Where remote work was perceived to be harmful focused on employees' abilities to communicate and collaborate with other employees.

How has the pandemic impacted commute patterns?

The dramatic increase in remote working that occurred in the initial months of the pandemic had a direct impact on commute patterns in Orange County. With far more employees reporting that they only worked from home in June 2020 (47%) when compared to February 2020 (12%), the percentage who commuted to a work site at least occasionally declined from 89% to 54% during this period. The net reduction in work commutes was felt in every mode category, with the percentage of employees reporting that they typically commute to work by driving alone declining from 77% to 48%, and use of public transit, active transportation, and carpool/vanpool for commuting was cut in half during the same period.

By September 2021, many workers had resumed their commutes to a work location outside of their home (at least once per week), although as noted above the amount of work taking place in the home remained well above pre-pandemic levels. Of the 70% of employees who commuted to work in September 2021, 60% indicated they typically drove alone, 4% took public transit, 3% carpooled or vanpooled, 2% used active transportation (walk/run/bike/E-bike), and 2% used a different mode.

With respect to alternative modes of transportation, the trend back toward pre-pandemic commute patterns is expected to continue. Once the pandemic is over, 5% of employees anticipated that they would typically use public transit for their commute, 4% expected to carpool or vanpool, 2% expected to use active transportation, and 2% other modes. All of these percentages are within 1% of the pre-pandemic values reported by employees in the baseline survey.

When it comes to driving alone for their commute, approximately seven-in-ten employees (69%) anticipated that they would typically do so once the pandemic is over, which is approximately 10% less than pre-pandemic due to the higher percentage of employees (18%) who anticipate only working from home in the future and thus will not be commuting.

In what other ways has the pandemic impacted residents' activities?

In the first few months of the pandemic, Orange County residents made significant changes in their travel, shopping, and dining habits. With respect to travel behavior, the percentage of days they **drove alone** in a vehicle declined from 65% in February 2020 to 43% in June 2020, use of **on-demand rideshare** declined from 4.4% of days to 0.9%, **carpooling** with someone they don't live with declined from 4.3% of days to 1.5%, riding a **bus** declined from 3.3% of days to 0.9%, while riding **Metrolink** or **Amtrak** declined from 1.4% of days in February 2020 to 0.2% in June 2020.

With respect to shopping and dining, the dramatic decline in the percentage of days respondents reported **eating a meal at a restaurant** (24% in February 2020 vs 5% in June 2020) was only partially offset by an increase in the percentage of days they ordered food for **pick-up** (12% in February vs 17% in June) or **delivery** (6% vs 8%). When compared to the patterns in February, there was also a modest uptick in the percentage of days Orange County residents purchased **groceries online** (2% in February vs 5% in June) and **purchased other products online** (20% vs 25%).

By August 2021, many of the activities had bounced back toward pre-pandemic levels. When compared to June 2020, the percentage of days respondents **drove alone** in a vehicle increased from 43% to 56%, use of **on-demand rideshare** increased from 0.9% of days to 3.5%, **carpooling** with someone they don't live with increased from 1.5% to 3.5%, riding a **bus** increased from 0.9% of days to 2.8%, while riding **Metrolink** or **Amtrak** increased from 0.2% of days in June 2020 to 1% in August 2021. Interestingly, the changes in shopping and dining behavior between June 2020 and August 2021 were comparatively slight, with the exception of **eating a meal at a restaurant**, which increased from 4.5% of days in June 2020 to 17.2% of days in August 2021.

Looking ahead to the post-pandemic period, respondents anticipated small changes in the number of days they will engage in most activities when compared to August 2021, including purchasing products online (-4%), eating a meal at a restaurant (+3%), ordering food for pick-up from a restaurant (-2%), ordering food for delivery from a restaurant (-1%), purchasing groceries online (-0.5%), carpooling (+1%), using on-demand rideshare (+0.8%), riding a bus (+1%), riding Metrolink or Amtrak (+1%), and vanpooling (+0.2%). The one notable exception was a large decline in the percentage of days they anticipated driving alone in a vehicle (-20%) once the pandemic is over when compared to August 2021.

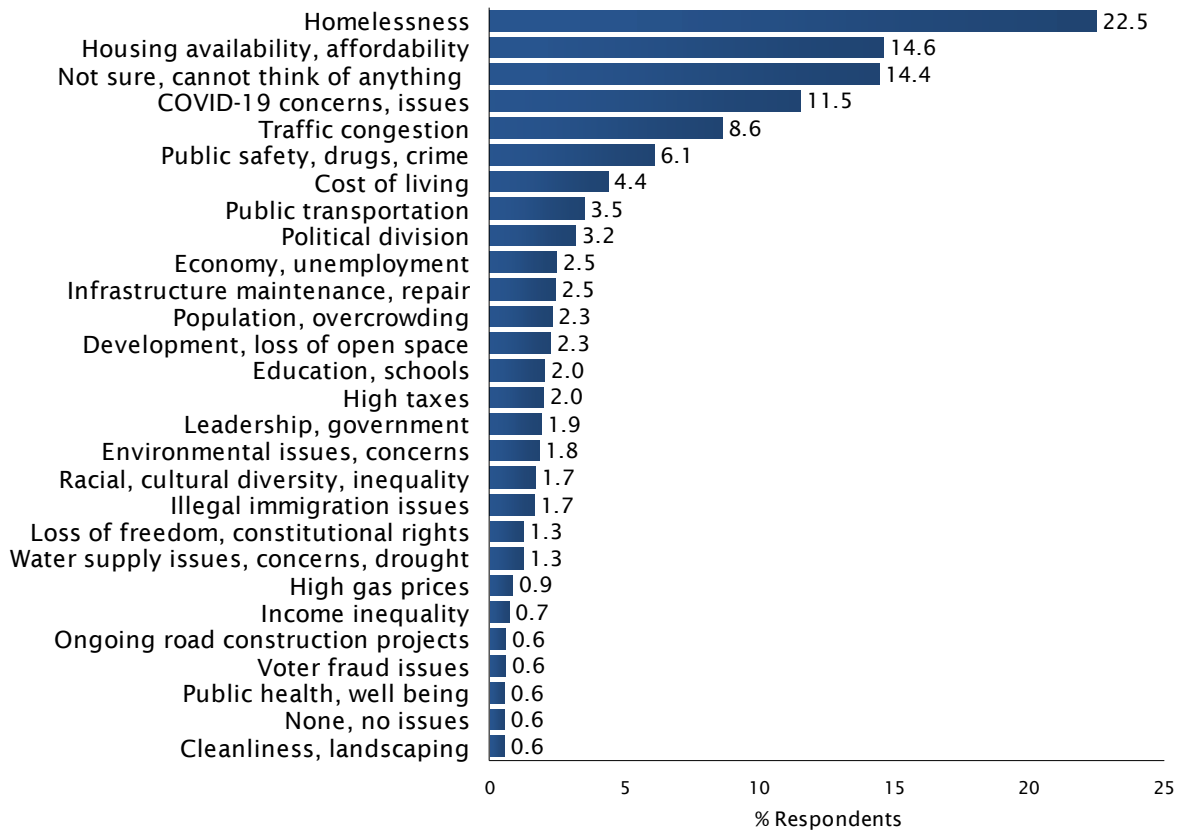
LOCAL ISSUES & THE PANDEMIC

At the outset of the interview, respondents were asked to identify the most important issues facing Orange County today, as well as their expectations for the coronavirus pandemic in the County.

MOST IMPORTANT ISSUES The opening question in this series asked respondents to identify the most important issue facing Orange County today. Question 2 was presented in an open-ended manner, which allowed respondents to mention any issue that came to mind without being prompted by—or restricted to—a particular list of issues. True North later reviewed the verbatim responses and grouped them into the categories shown in Figure 2.

Question 2 *Thinking about Orange County as a whole, what would you say is the most important issue facing Orange County today?*

FIGURE 2 MOST IMPORTANT ISSUE FACING COUNTY



Homelessness was top-of-mind for many respondents, with nearly one-quarter (23%) identifying it as the most important issue facing Orange County today. Other specific issues mentioned in response to Question 2 included housing availability/affordability (15%), COVID-19 concerns/issues (12%), traffic congestion (9%), public safety/drugs/crime (6%), cost of living (4%), and public transportation (4%). It is also worth noting that 14% of respondents could not identify an issue they felt was the most important facing Orange County as a whole, and 1% stated flatly that no such issue exists.

Table 1 shows how responses to Question 2 varied by Supervisorial District. Although the rank order varied slightly, homelessness, housing availability/affordability, and COVID-19 concerns/issues were among the top five issues mentioned in *every* district. Moreover, Table 2 demonstrates that although COVID-19 is still among the top concerns for Orange County residents, it has declined in importance over the past year, allowing other issues like homelessness and housing availability/affordability to increase in saliency.

TABLE 1 TOP ISSUE FACING COUNTY BY SUPERVISORIAL DISTRICT

Supervisorial District				
One	Two	Three	Four	Five
Homelessness	Homelessness	Not sure, cannot think of anything	Homelessness	Housing availability, affordability
Housing availability, affordability	Housing availability, affordability	Housing availability, affordability	Not sure, cannot think of anything	Homelessness
Not sure, cannot think of anything	COVID-19 concerns, issues	Homelessness	Housing availability, affordability	Not sure, cannot think of anything
COVID-19 concerns, issues	Not sure, cannot think of anything	Traffic congestion	COVID-19 concerns, issues	COVID-19 concerns, issues
Traffic congestion	Public safety, drugs, crime	COVID-19 concerns, issues	Traffic congestion	Traffic congestion
Public safety, drugs, crime	Traffic congestion	Cost of living	Public safety, drugs, crime	Cost of living
Education, schools	Public transportation	Political division	Cost of living	Public safety, drugs, crime
Economy, unemployment	Political division	Public safety, drugs, crime	Public transportation	Public transportation
Political division	Cost of living	Environmental issues, concerns	Infrastructure maintenance, repair	Development, loss of open space
Cost of living	Infrastructure maintenance, repair	Public transportation	Loss of freedom, constitutional rights	High taxes

TABLE 2 TOP ISSUES FACING COUNTY BY STUDY VERSION

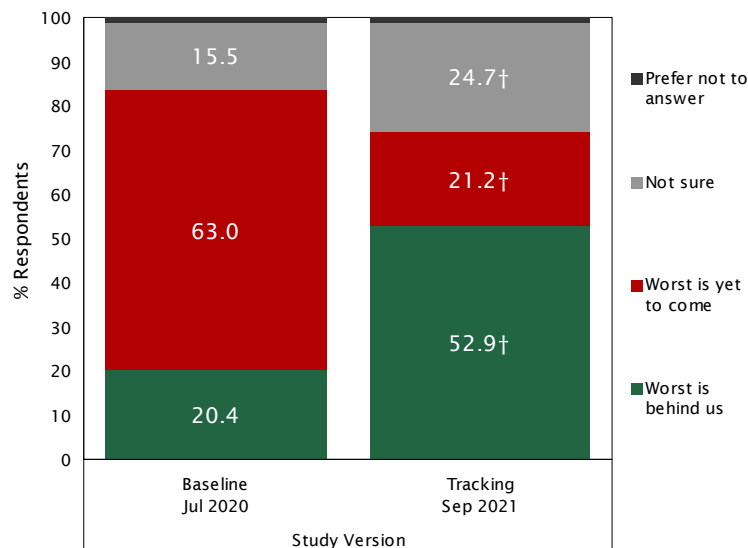
Study Version	
Baseline Jul 2020	Tracking Sep 2021
COVID-19 concerns, issues	Homelessness
Not sure, cannot think of anything	Housing availability, affordability
Homelessness	Not sure, cannot think of anything
Housing availability, affordability	COVID-19 concerns, issues
Traffic congestion	Traffic congestion

EXPECTATIONS FOR CORONAVIRUS PANDEMIC Anticipating that many respondents would identify the coronavirus/COVID-19 as the most important issue facing Orange County today, the surveys explored respondents’ views regarding the trajectory of the pandemic. When it comes to the coronavirus outbreak in Orange County, do they think the worst is behind us—or is the worst yet to come?

As shown in Figure 3, opinions about the pandemic have changed substantially over the past year. In the baseline survey conducted in July 2020, nearly two-thirds of respondents (63%) were pessimistic about the coronavirus outbreak in Orange County, anticipating that the worst is yet to come. Approximately 20% were optimistic, feeling that the worst is behind us. The remaining respondents were either uncertain (16%) or preferred to not share their opinion (1%). By September 2021, Orange County residents were far more optimistic about the path of the pandemic, with 53% feeling that the worst is behind us, 21% anticipating the worst is yet to come, and the remainder being unsure (25%) or unwilling to share their opinion (1%).

Question 3 Which comes closer to your view about where Orange County stands in the coronavirus outbreak: the worst is behind us OR the worst is yet to come?

FIGURE 3 OPINION OF CORONAVIRUS OUTBREAK BY SURVEY YEAR



† Statistically significant change ($p < 0.05$) between the 2020 and 2021 studies.

Figures 4-6 on the next page show how expectations for the coronavirus pandemic in Orange County in the tracking survey (September 2021) varied by age, employment status in September and post-pandemic, length of residence in Orange County, Supervisorial District, gender, ethnicity, and household income. Although certain groups (e.g., high income households) were more optimistic than others, it is striking that the dominant opinion in every identified subgroup was that the worst of the coronavirus pandemic is behind us.

FIGURE 4 OPINION OF CORONAVIRUS OUTBREAK BY AGE & EMPLOYMENT STATUS SEP VS POST-PANDEMIC

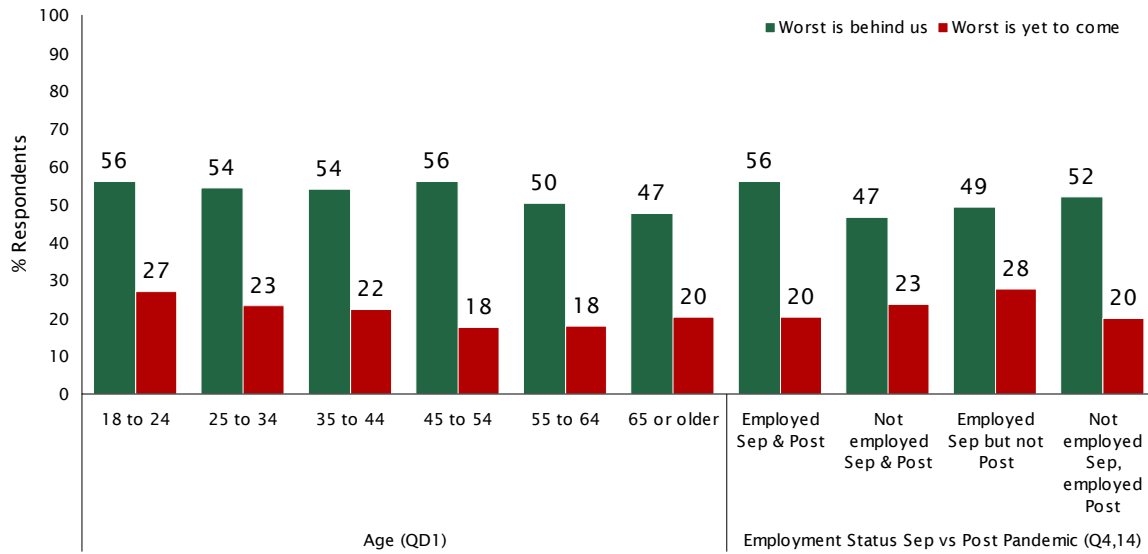


FIGURE 5 OPINION OF CORONAVIRUS OUTBREAK BY YEARS IN ORANGE COUNTY, SUPERVISORIAL DISTRICT & GENDER

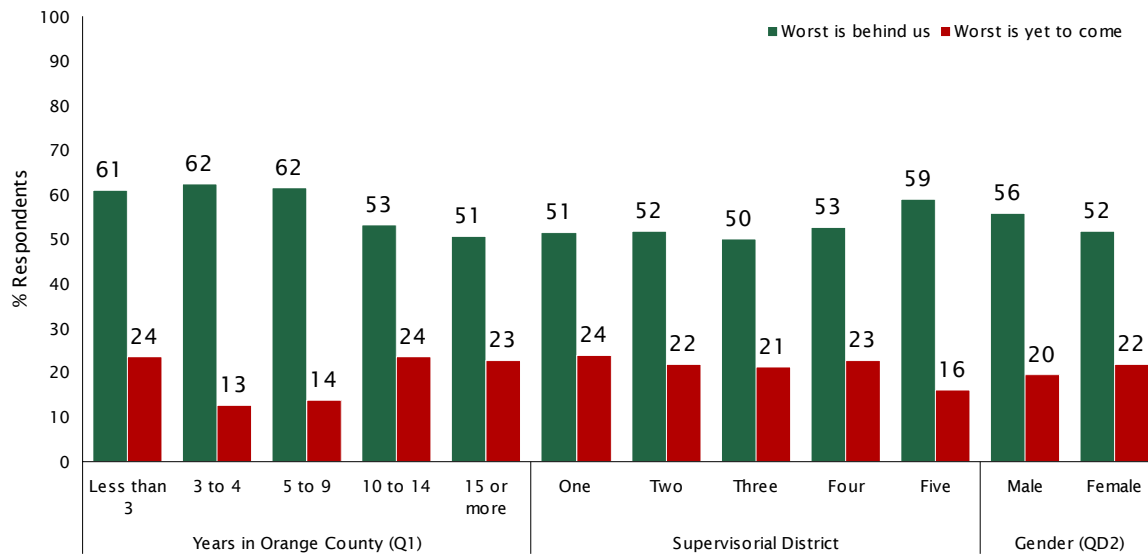
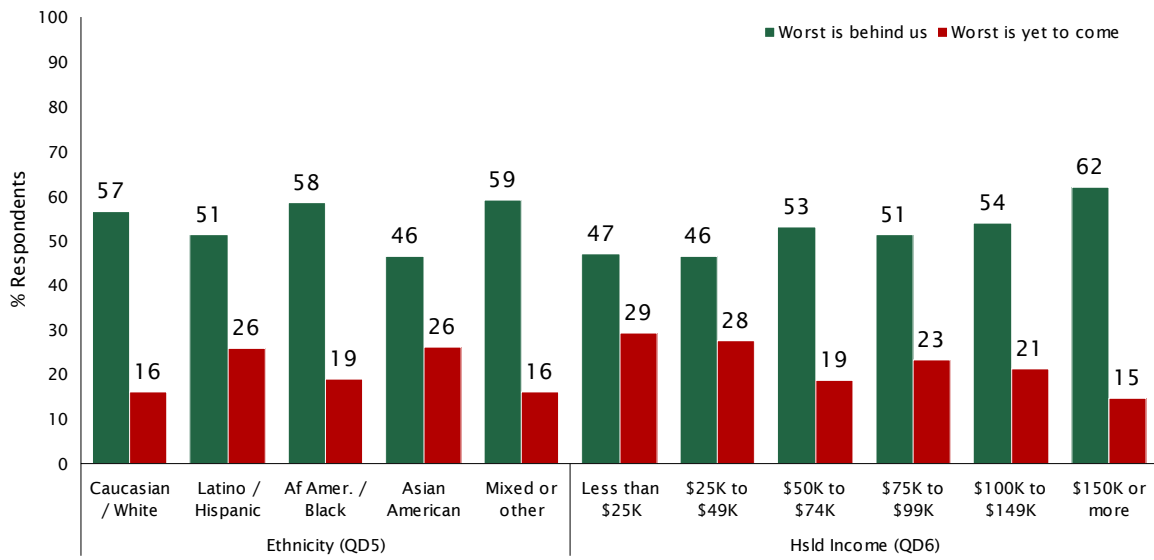


FIGURE 6 OPINION OF CORONAVIRUS OUTBREAK BY ETHNICITY & HSLD INCOME



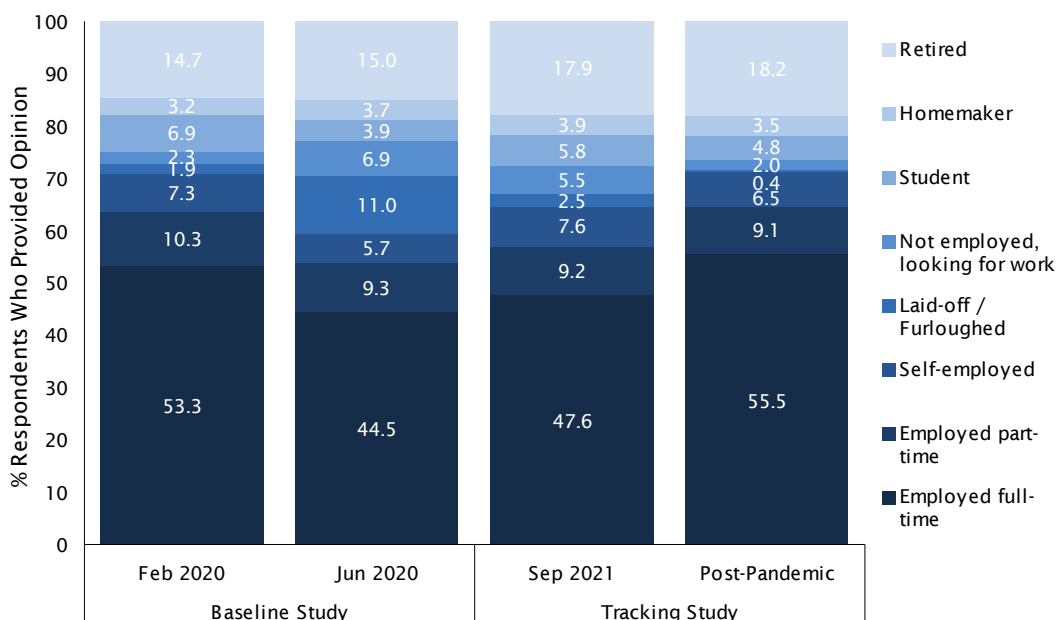
EMPLOYMENT & COMMUTE

As noted in the *Introduction*, the primary purpose of the study described in this report was to develop a statistically reliable understanding of how the pandemic has altered working arrangements, travel behaviors, and mode choice for Orange County residents. To identify the changes that have occurred, the surveys asked a series of questions that profiled respondents' employment status, working arrangements, and commute behavior in February 2020 (before the pandemic), in June 2020 (during the pandemic), and in September 2021 (during the pandemic). Respondents in the tracking survey were also asked about their anticipated work and commute characteristics once the pandemic is over (post-pandemic). The results from both surveys (baseline and tracking) are combined in the graphics presented in this section to allow for easy comparisons, although it is important to note that the question numbering aligns with the tracking survey.

Question 4 *We're interested in how your activities may have changed in response to the pandemic. First, let me ask about your current situation. Which best describes your current employment status? Are you employed full-time, employed part-time, self-employed, laid-off or furloughed, not employed but looking for work, a student, a homemaker, or retired?*

Question 14 *Next, let me ask you about the future, when the pandemic is over. If you aren't sure about an answer, please give me your best estimate. When the pandemic is over, do you expect to be employed full-time, employed part-time, self-employed, laid-off or furloughed, not employed but looking for work, a student, a homemaker, or retired?*

FIGURE 7 EMPLOYMENT STATUS: FEB 2020, JUN 2020, SEP 2021 & POST-PANDEMIC



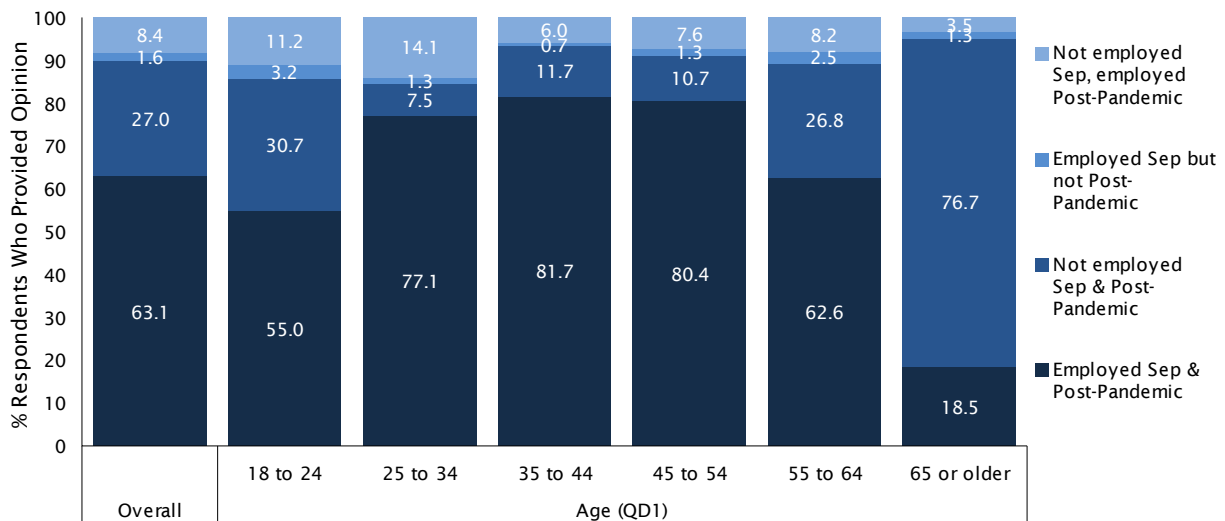
EMPLOYMENT STATUS Consistent with the sharp increase in unemployment recorded statewide during the months of April, May and June 2020 in response to the pandemic,⁴ the baseline survey results revealed that Orange County residents experienced significant job losses in the early months of the pandemic. Full-time employment declined 9% between February and

June 2020, with additional declines in part-time employment (-1%) and self-employment (-1.6%). Meanwhile, the percentage of individuals surveyed who were unemployed/looking for work, laid-off, or furloughed increased from 4% to 18% between February and June, 2020 (see Figure 7).

More than a year later (September 2021), the tracking survey indicates that although employment has rebounded in Orange County from the early months of the pandemic, it remains depressed when compared to pre-pandemic levels. Sixty-four percent (64%) of respondents in the tracking survey indicated they were employed full-time (48%), part-time (9%), or self-employed (8%), compared to 71% in February 2020. The current patterns notwithstanding, Orange County residents anticipated that their levels of employment will return to pre-pandemic levels once the pandemic is over, with 56% expecting to work full-time, 9% part-time, and 7% self-employed during the post-pandemic period.

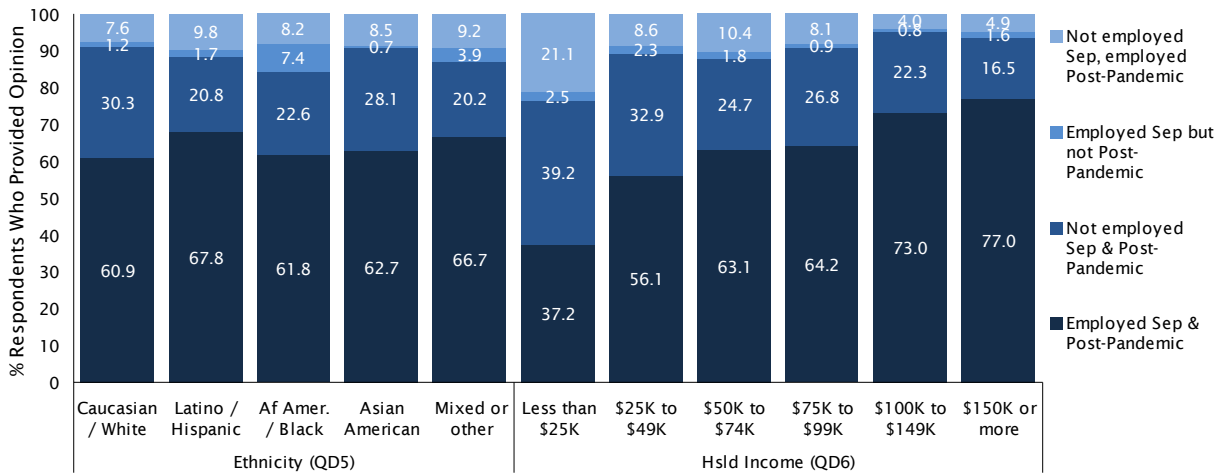
Figures 8 and 9 highlight patterns of employment in September 2021 and expectations for the post-pandemic period among key subgroups of Orange County residents. The top two layers of the bar focus on those whose employment status is expected to *change* between September 2021 and when the pandemic ends. Across all subgroups, the percentage that expected a change in employment status during this period ranged between 5% and 24%, with the dominant type of change being a transition from not being employed in September 2021 to gaining employment when the pandemic is over. When compared to their respective counterparts, younger residents (under 35) and low-income residents (under \$25,000 annually) were the most likely to anticipate a change in employment status.

FIGURE 8 EMPLOYMENT STATUS: SEP 2021 & POST-PANDEMIC BY OVERALL & AGE



4. According to the California Employment Development Department (EDD), the unemployment rate in California jumped from 4.2% in February to 15.5% in April 2020, reached 16.4% in May 2020, and tapered to 14.9% in June 2020.

FIGURE 9 EMPLOYMENT STATUS: SEP 2021 & POST-PANDEMIC BY ETHNICITY & HSLD INCOME

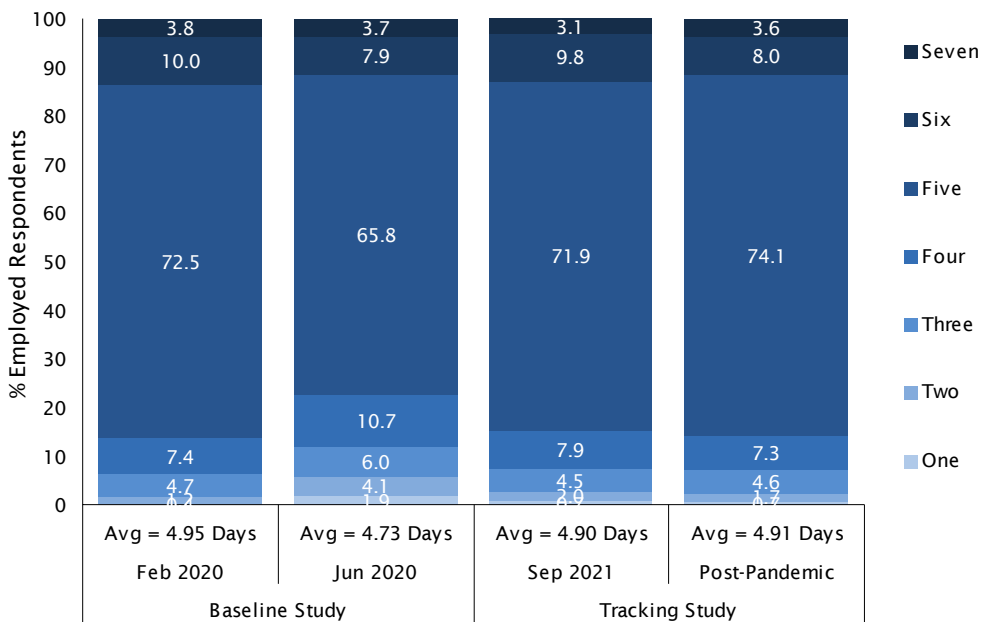


DAYS WORKING PER WEEK In addition to a change in employment status, some workers experienced a reduction in the number of days they worked per week during the first few months of the pandemic. As shown in Figure 10, 86% of employees reported that they worked at least five days per week in February 2020, with the average number of days worked among all employed individuals being 4.95. By June 2020, those figures had declined to 77% working at least five days per week, and 4.73 days worked per week, on average. The tracking survey results reveal that by September 2021, the average number of days worked per week returned to pre-pandemic levels (4.90) with little change expected once the pandemic is over (4.91).

Question 5 *How many days per week do you typically work?*

Question 15 *After the pandemic is over, how many days per week do you expect to work?*

FIGURE 10 WORK DAYS PER WEEK: FEB 2020, JUN 2020, SEP 2021 & POST-PANDEMIC



Figures 11-13 broaden the work days analysis to include *all* respondents (regardless of their employment status in September 2021) to provide a wider perspective on the pandemic’s impacts among Orange County adults overall. As shown in the figures, the vast majority of respondents in all subgroups anticipated they will work the same number of days during the post-pandemic period as they did in September 2021 (i.e., no change). Among those who did anticipate a change in work days, the percentage that anticipated working *more* days after the pandemic is over was greater than the percentage that expected to work fewer days in nearly every identified subgroup.

FIGURE 11 WORK DAYS PER WEEK SEP 2021 VS POST-PANDEMIC BY OVERALL, SUPERVISORIAL DISTRICT & AGE

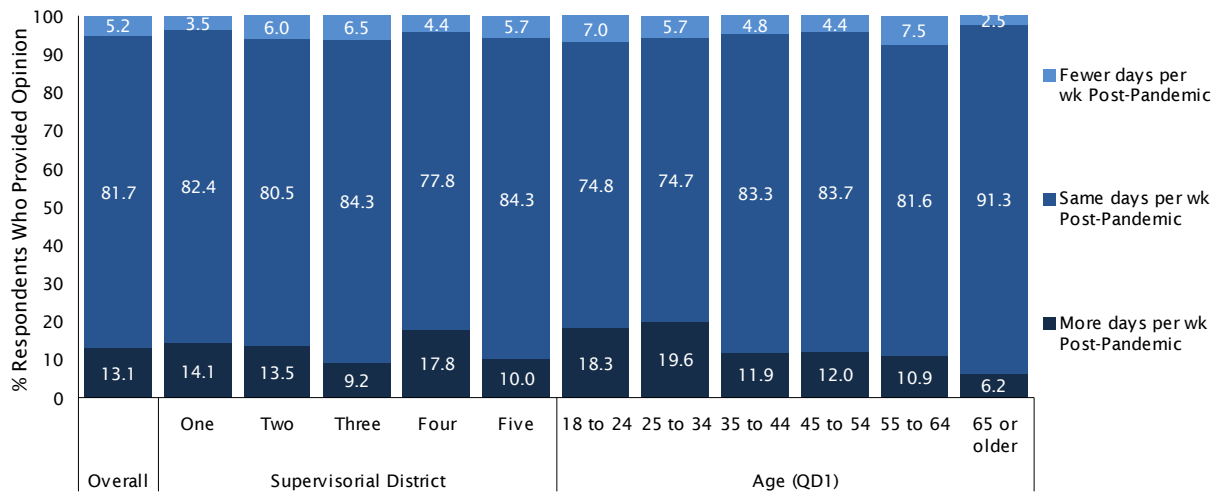


FIGURE 12 WORK DAYS PER WEEK SEP 2021 VS POST-PANDEMIC BY ETHNICITY & HSLD INCOME

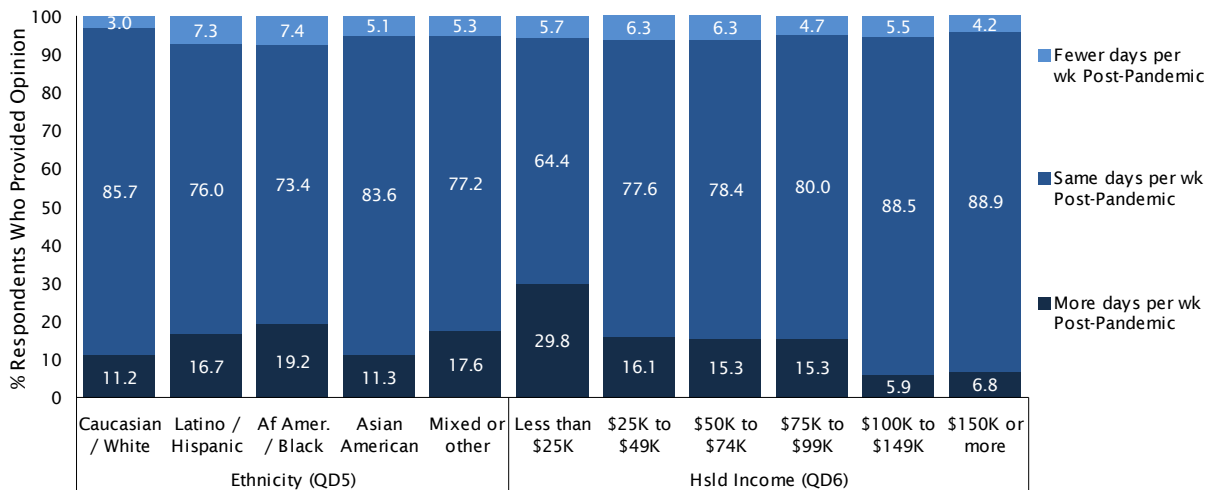
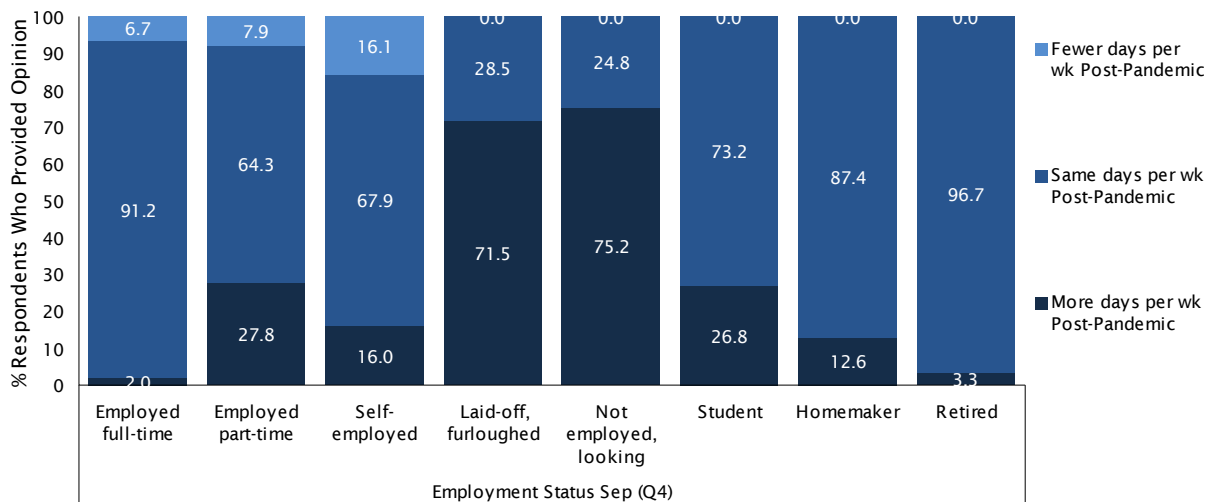


FIGURE 13 WORK DAYS PER WEEK SEP 2021 VS POST-PANDEMIC BY EMPLOYMENT STATUS SEP 2021



WORKING FROM HOME Concerns about COVID-19 transmission in the work place and guidelines issued by California and the Centers for Disease Control and Prevention (CDC) prompted many Orange County businesses to shift to a remote working model when the pandemic struck, with employees working from home rather than coming to a central work site. As shown in Figure 14 on the next page, the pandemic created a dramatic shift in *where* business is being conducted in Orange County.

Prior to the pandemic in February 2020, less than one-quarter (23%) of employed Orange County residents indicated they worked from home at least one day per week, which translated to an overall average of 0.76 days per week working from home per employee. Four months later in June 2020, 61% of employed residents reported that they worked from home at least one day per week, and the average number of days working from home per employee had jumped to 2.52 per week.

Although the widespread availability of COVID-19 vaccines and relaxation of public health guidelines in 2021 has allowed many workers the *option* to return to the office, the tracking survey indicates that only a modest percentage have decided to do so. Reporting on their work arrangements in September 2021, 48% indicated that they worked from home at least one day per week, with the average number of days worked from home among all employees being 1.97—not far below the 2.52 reported in June 2020. Even after the pandemic is over, the percentage of employees who anticipate working from home at least one day per week (44%) is double pre-pandemic levels, as is the expected average number of days worked from home per week (1.55).

In a manner similar to that described above for the work days analysis, Figures 15-17 broaden the teleworking analysis to put remote working patterns in the context of *all* respondents. As shown in the figures, the majority of respondents in all subgroups anticipated that the number of days they work from home each week post-pandemic will be the same as the number they worked in September 2021. Those who anticipated a change tended to anticipate fewer days worked from home in the future, rather than more.

Question 6 Of the < insert from Q5 > days per week you typically work, how many of these days do you primarily work from home?

Question 16 Of the < insert from Q15 > days per week you expect to work, how many of these days do you expect to primarily work from home after the pandemic?

FIGURE 14 TELEWORK DAYS PER WEEK: FEB 2020, JUN 2020, SEP 2021 & POST-PANDEMIC

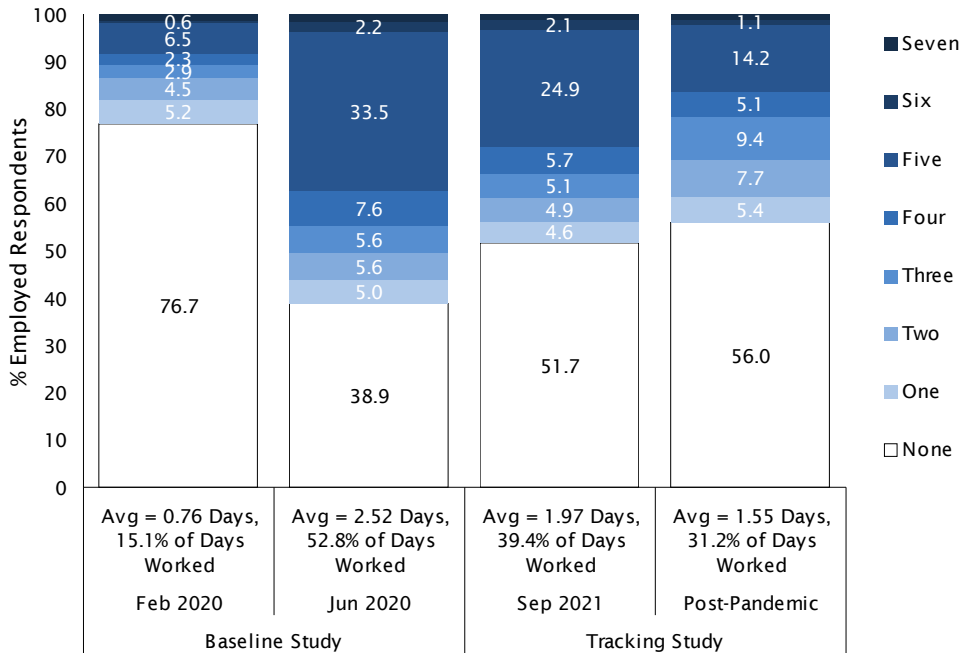


FIGURE 15 TELEWORK DAYS PER WEEK SEP 2021 VS POST-PANDEMIC BY OVERALL, SUPERVISORIAL DISTRICT & AGE

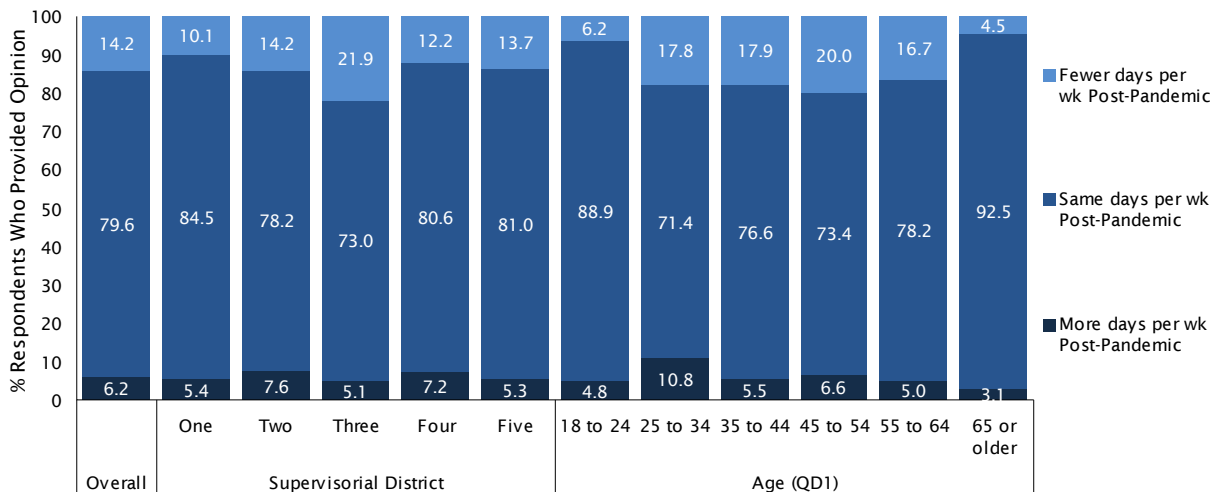


FIGURE 16 TELEWORK DAYS PER WEEK SEP 2021 VS POST-PANDEMIC BY ETHNICITY & HSLD INCOME

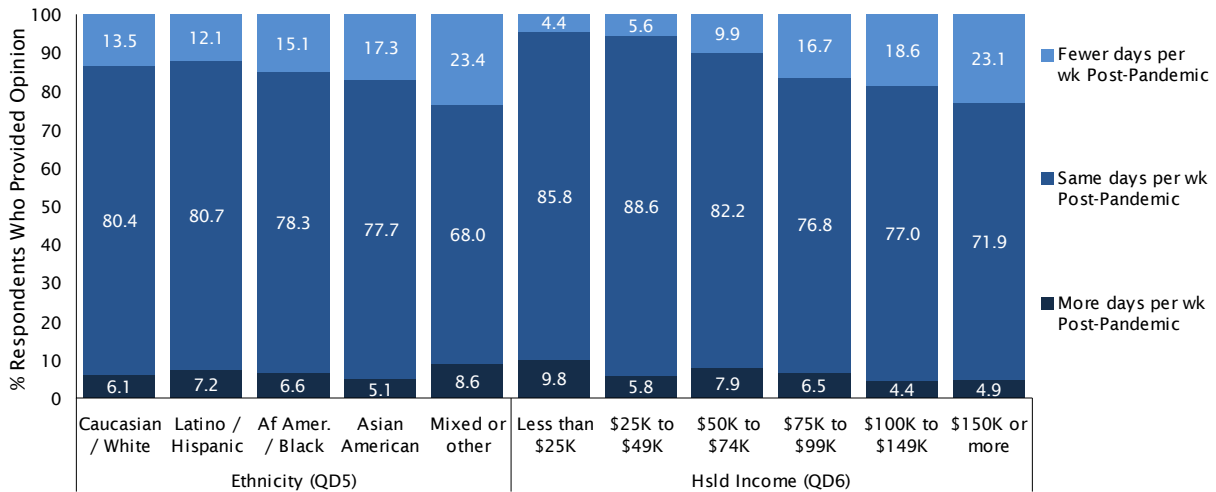
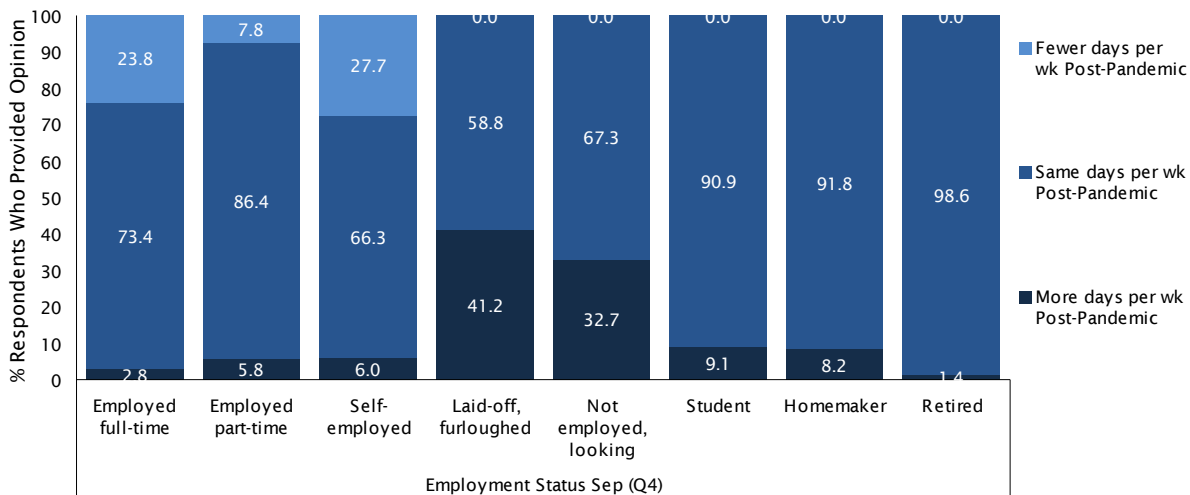


FIGURE 17 TELEWORK DAYS PER WEEK SEP 2021 VS POST-PANDEMIC BY EMPLOYMENT STATUS SEP



COMMUTE MODE The dramatic increase in remote working that occurred between February and June 2020 had a direct impact on commute patterns in Orange County. With far more employees reporting that they *only* worked from home in June (47%) when compared to February (12%), the percentage who commuted to a work site at least occasionally declined from 89% in February to 54% in June 2020 (see Figure 18). The net reduction in work commutes was felt in every mode category, with the percentage of employees reporting that they typically commute to work by driving alone declining from 77% to 48%, and use of public transit, active transportation, and carpool/vanpool for commuting was cut in half during the same period.

By September 2021, many workers had resumed their commutes to a work location outside of their home (at least once per week), although as noted in the previous section the amount of work taking place in the home remained well above pre-pandemic levels. Of the 70% of employees who commuted to work in September 2021, 60% indicated they typically drove alone, 4% took public transit, 3% carpoled or vanpoled, 2% used active transportation (walk/run/bike/E-bike), and 2% used a different mode.

With respect to alternative modes of transportation, the trend back toward pre-pandemic commute patterns is expected to continue. Once the pandemic is over, 5% of employees anticipated that they would typically use public transit for their commute, 4% expected to carpool or vanpool, 2% expected to use active transportation, and 2% other modes. Approximately seven-in-ten employees (69%) anticipated that they would drive alone to work once the pandemic is over, which is approximately 10% less than pre-pandemic due to the higher percentage of employees (18%) who anticipate only working from home and thus will not be commuting. Figure 19 shows how the September 2021 and anticipated post-pandemic commute modes varied by Supervisorial District.

Question 7 When you commute to a work destination outside of your home, how do you typically commute to work?

Question 17 When you commute to a work destination outside of your home, how will you typically commute to work once the pandemic is over?

FIGURE 18 COMMUTE MODE: FEB 2020, JUN 2020, SEP 2021 & POST-PANDEMIC

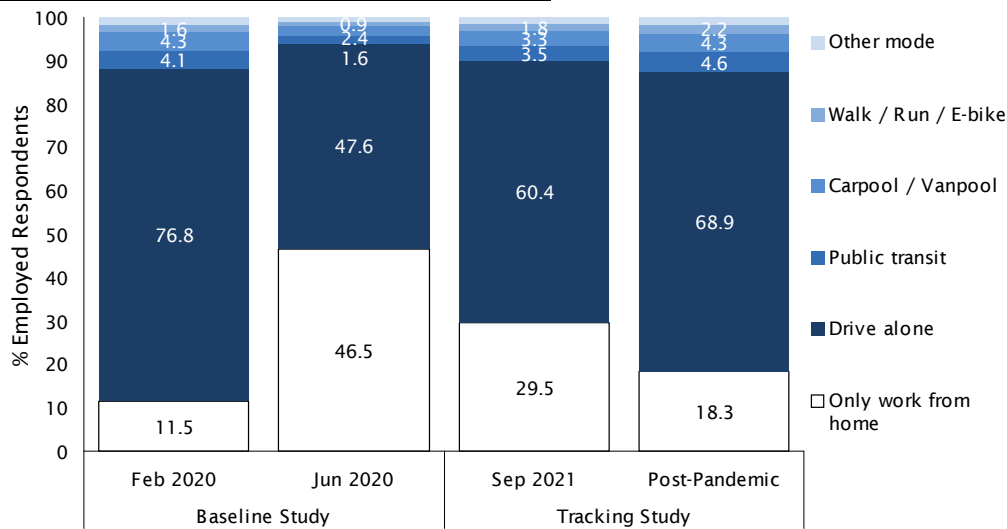
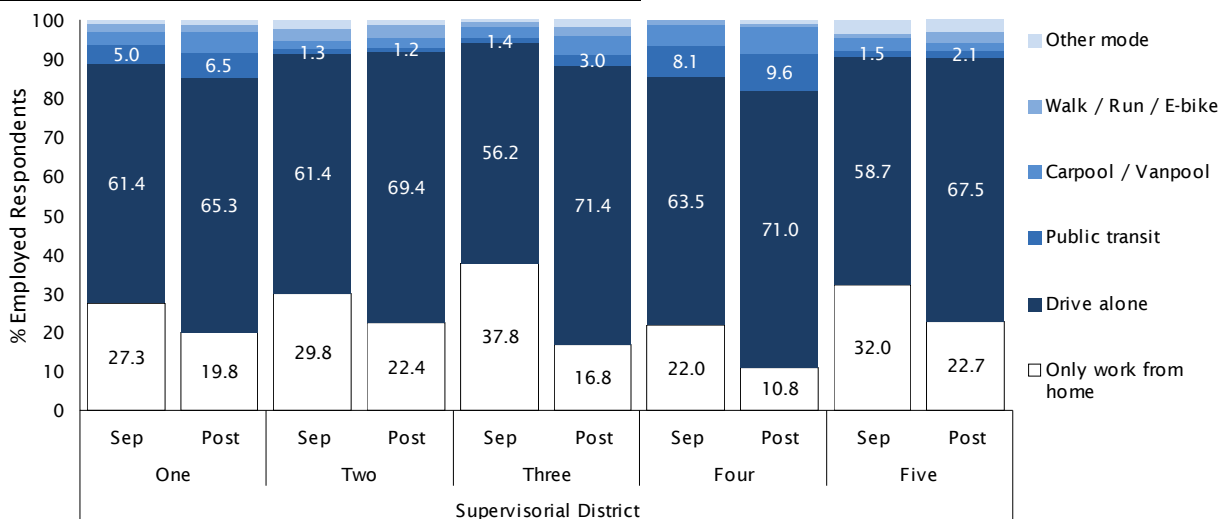


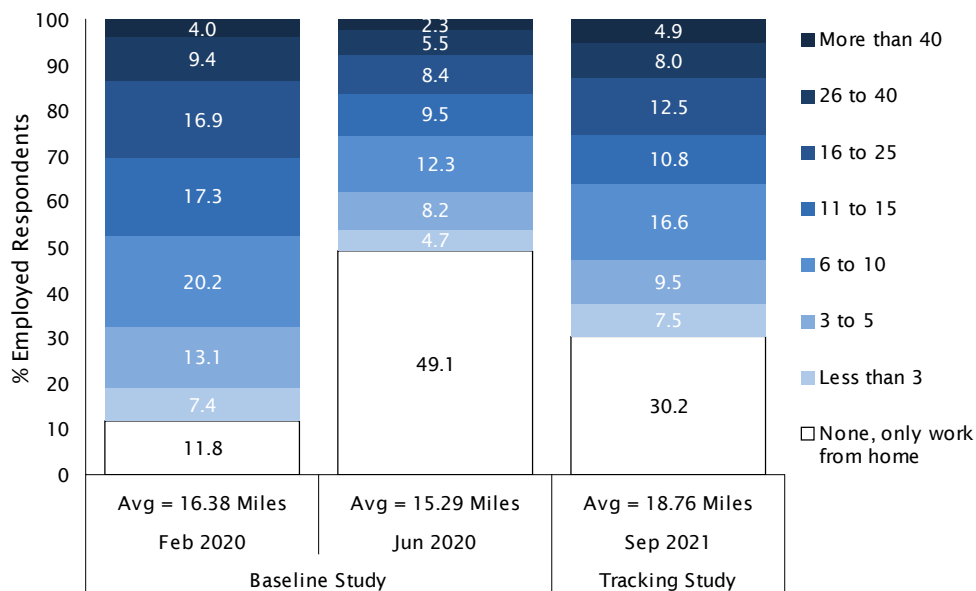
FIGURE 19 COMMUTE MODE SEP 2021 VS POST-PANDEMIC BY SUPERVISORIAL DISTRICT



COMMUTE DISTANCE Although the percentage of employees commuting to work has fluctuated dramatically over the course of the pandemic, the *average* commute distance among those still commuting to work has remained fairly consistent—averaging 16.38 miles prior to the pandemic, 15.3 miles in June 2020, and 18.76 miles in September 2021 (Figure 20).

Question 8 *In miles, what is the approximate one-way commute distance between your home and your place of work?*

FIGURE 20 WORK COMMUTE MILES: FEB 2020, JUN 2020 & SEP 2021



EMPLOYER’S POLICY ON WORKING FROM HOME The ability for an employee to work from home requires an employer that embraces (or at least accepts) the practice. Prior to the arrival of COVID-19, most employed Orange County residents (70%) indicated that their employer did not offer them the option to work from home at least one day per week. Approximately one-quarter of individuals (24%) worked for an employer who allowed remote working and took advantage of the opportunity by working from home at least one day, whereas an additional 7% were given the opportunity to work from home, but declined to do so (see Figure 21 on the next page).

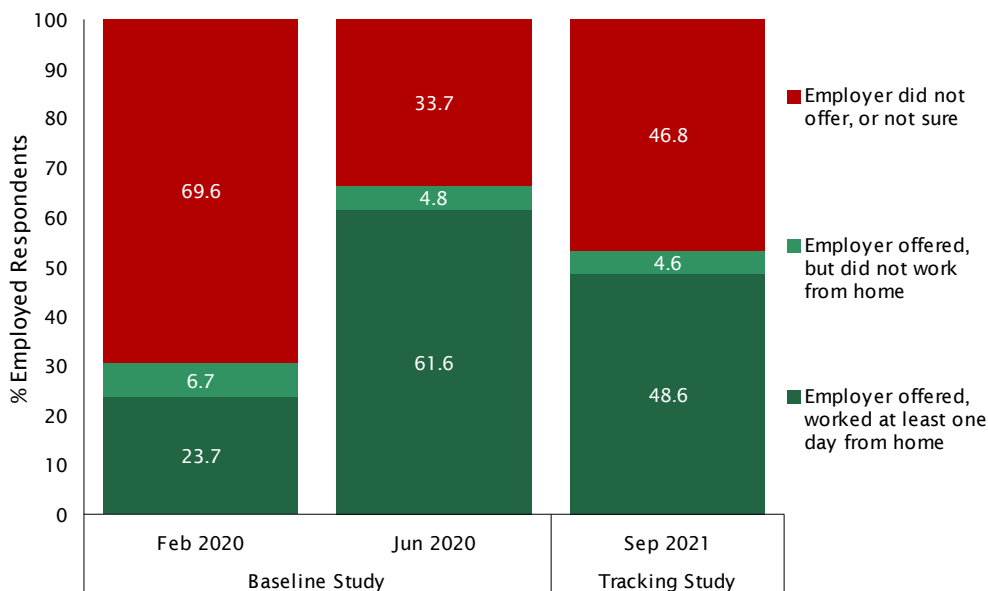
By June 2020, the pandemic had forced many employers to change their policies regarding remote work. Whereas seven-in-ten employees reported in February their employer did not allow them to work from home at least one day per week, by June 2020 that figure had been cut in half to 34%. Two-thirds of employed Orange County residents in June 2020 reported that their employer allowed them to telework from home at least one day per week, with 62% reporting that they did so.

The widespread availability of COVID-19 vaccines and relaxation of public health guidelines in 2021 appears to have prompted some Orange County employers to rescind their policies allowing remote work, as nearly half (47%) of employees surveyed in September 2021 indicated that their employer does not currently allow them the option of working from home at least once day

per week. A similar percentage (49%) indicated their employer does allow remote work and they work from home at least one day per week, whereas 5% indicated they have the option to work from home, but choose not to do so.

Question 9 *Does your employer currently give you the option to work from home at least one day per week?*

FIGURE 21 TELEWORK OPTION: FEB 2020, JUN 2020 & SEP 2021



Although all industries and occupational categories experienced an increase in remote working during the pandemic, by September 2021 the patterns were far from even (see Figure 22 on the next page). Certain industries such as professional, scientific & technology, information, real estate, rental & leasing, wholesale trade, and finance & insurance apparently lend themselves to working from home, with three-quarters or more of employees surveyed in these industries indicating that their employers give them the option to work from home. At the other end of the spectrum, less than four-in-ten employees in industries that generally require in-person services or labor such as transportation & warehousing, accommodation & food services, retail trade, education, utilities, manufacturing, and construction reported that their employer gives them the option to work from home at least one day per week.

Similarly, remote work patterns varied dramatically across occupations in September 2021, with far more office professionals reporting that their employers allow them the option to work from home when compared to those working in manual or skilled labor positions (see Figure 23). At the extremes, more than eight-in-ten employees working in legal, architecture and engineering, and business and financial positions reported that their employer allows them to work from home, compared to less than 15% of employees in transportation, food preparation and serving, and install, repair and maintenance positions.

FIGURE 22 TELEWORK OPTION SEP 2021 BY INDUSTRY

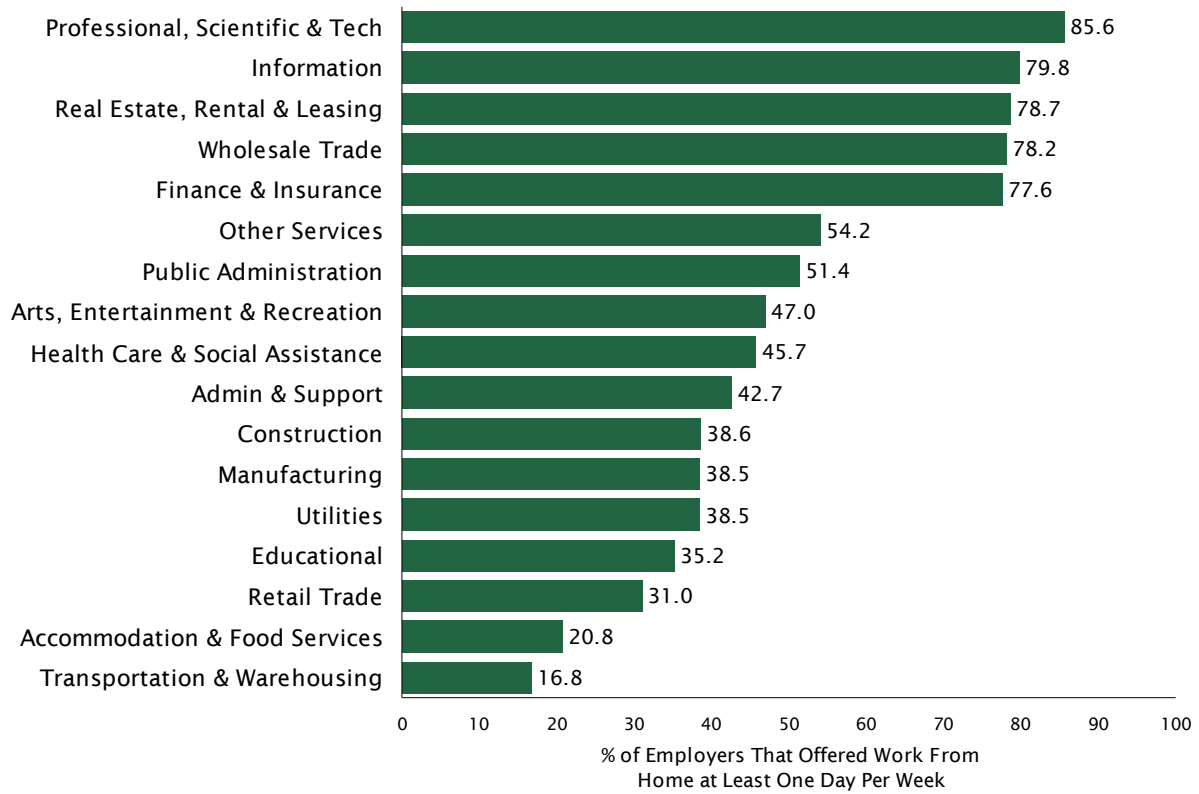
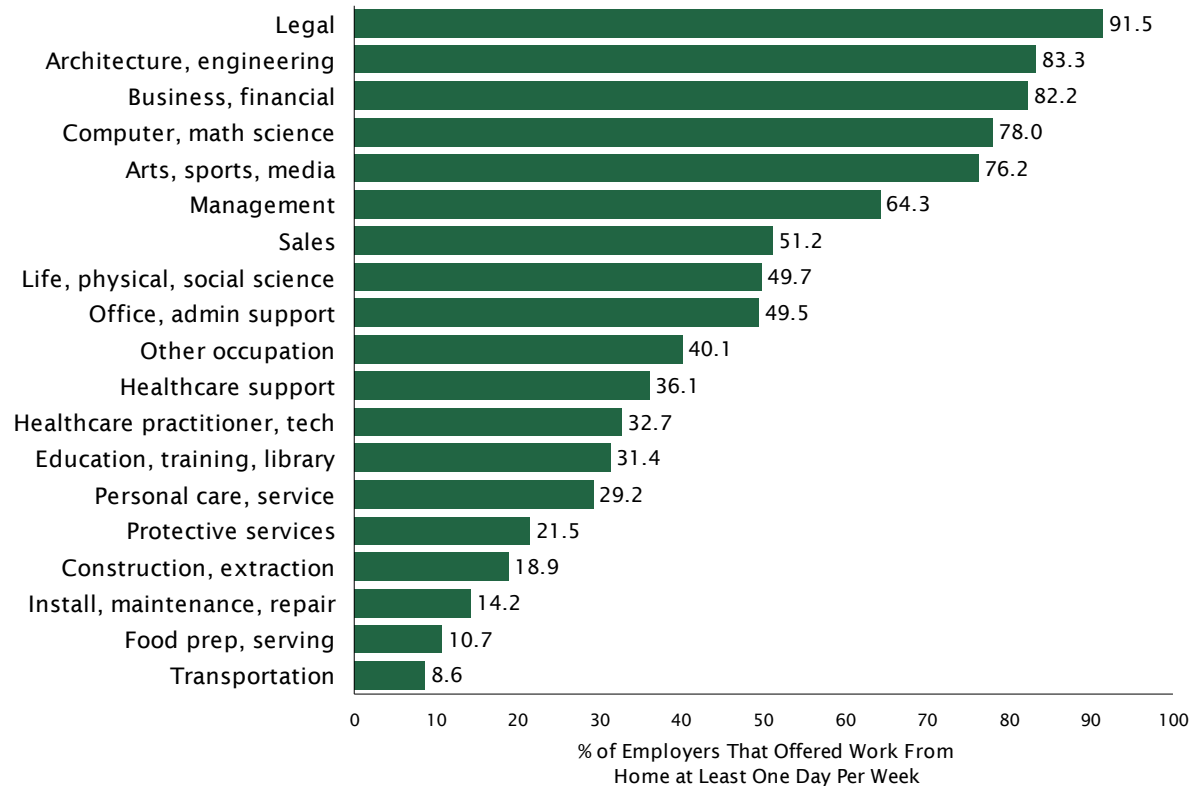


FIGURE 23 TELEWORK OPTION SEP 2021 BY OCCUPATION

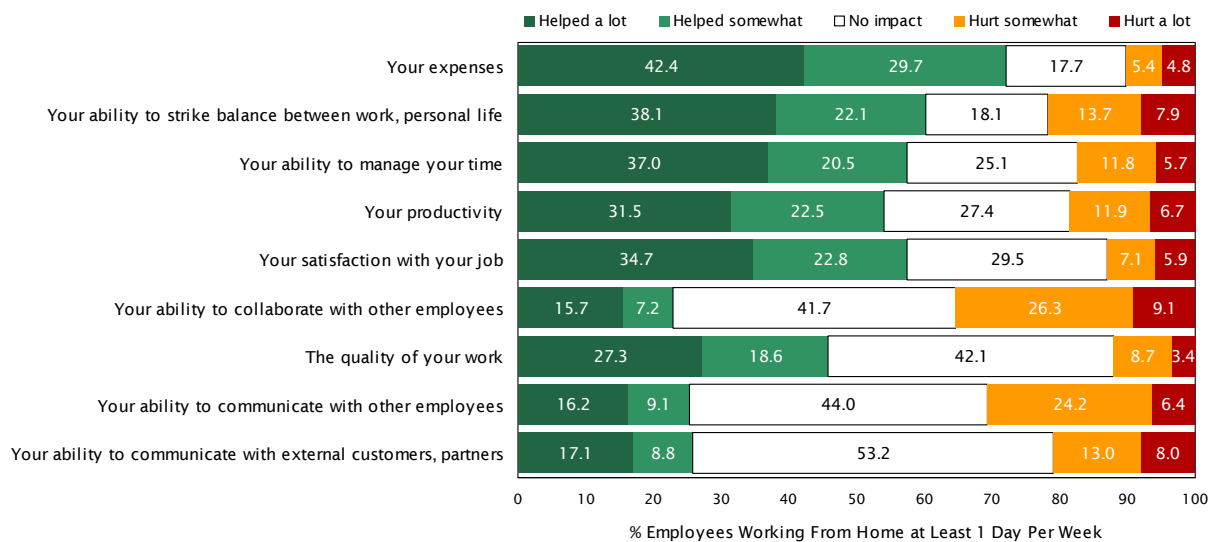


REMOTE WORK IMPACTS Employees who currently work at home at least one day per week were asked to describe how remote work has impacted various aspects of their job performance, their ability to collaborate with other employees, as well as their personal life and living arrangements. For each item shown on the left of Figure 24, employees were asked whether they find that working from home has helped, had no impact, or hurt this aspect of their job and/or life. Although the items were asked in a random order to avoid a systematic position bias, they are sorted in the figure from high to low based on the percentage who indicated the dimension has been impacted (helped or hurt).

Employees reported that working from home has had the most impact on their expenses, their ability to strike a balance between work and their personal life, their ability to manage their time, their productivity, and their job satisfaction, with at least seven-in-ten employees reporting either a positive or negative impact for each dimension. Approximately half of employees also reported that working from home has had an impact on their ability to collaborate with other employees, the quality of their work, their ability to communicate with other employees, and their ability to communicate with external customers or partners.

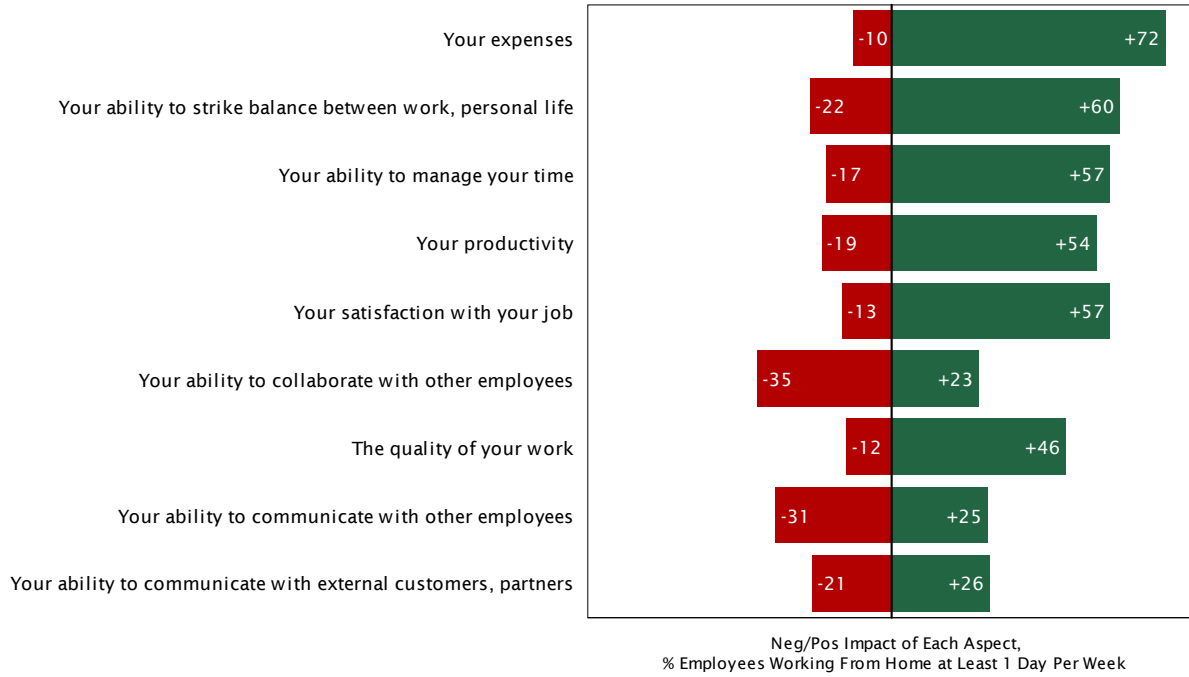
Question 12 *Next are a few questions about your experiences working from home during the past year. In general, do you find that working from home has helped, had no impact, or hurt: -----?*

FIGURE 24 IMPACT OF WORKING FROM HOME



For every dimension tested, some employees felt that remote work arrangements helped, while others perceived they hurt. Figure 25 on the next page displays the findings of Question 12 in a format that makes it easier to identify dimensions for which the *net* impact across all employees was generally positive or negative. For all but two of the dimensions tested (ability to collaborate with other employees and ability to communicate with other employees), more employees perceived that working from home was generally helpful than hurtful. The largest *net* positive impacts (helpful % - hurtful %) were found with respect to their expenses (62%), job satisfaction (44%), ability to manage their time (40%), and ability to strike a balance between work and their personal life (38%).

FIGURE 25 NEGATIVE/POSITIVE IMPACTS OF EACH ASPECT



CURRENT & POST-PANDEMIC ACTIVITIES

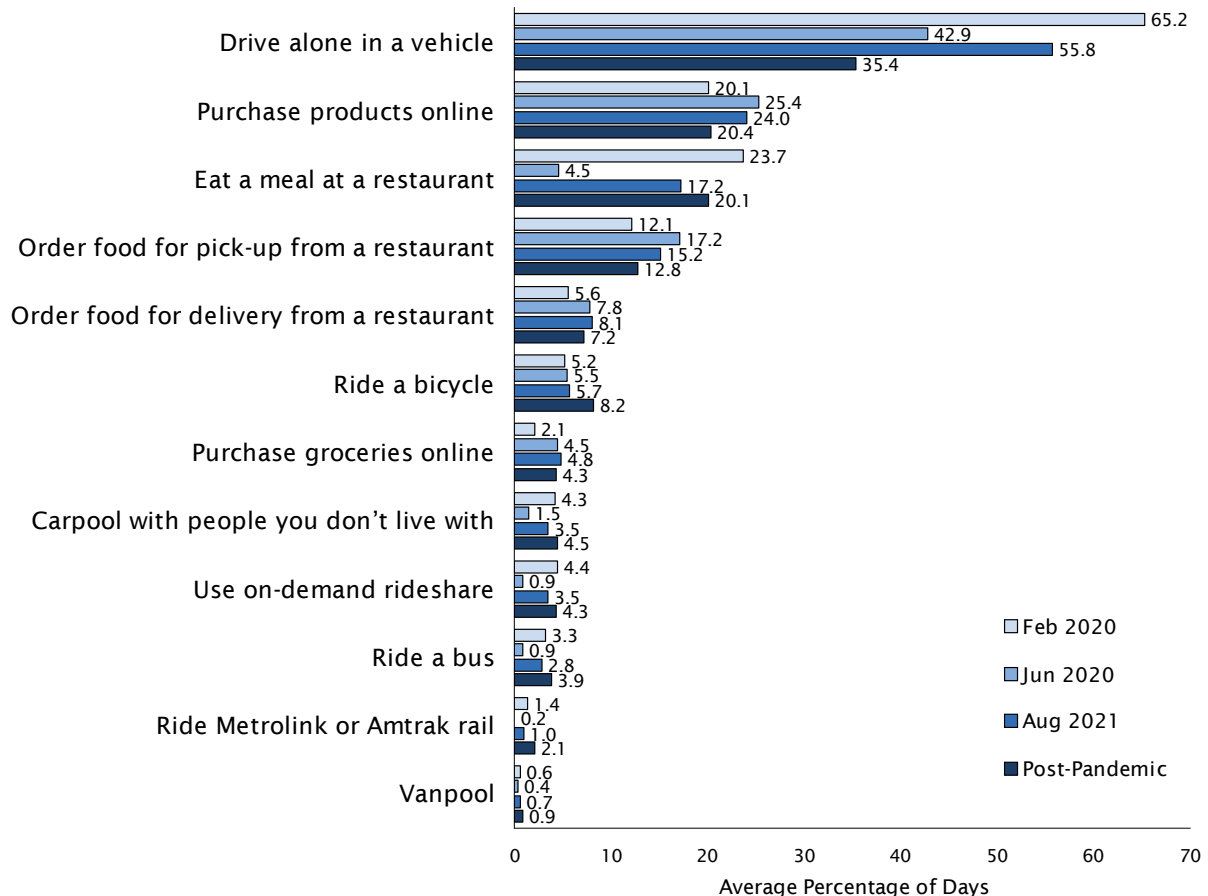
Having profiled respondents' employment status, working arrangements, and commute behavior in February 2020, June 2020, September 2021, and post-pandemic expectations, the study transitioned to identifying how other aspects of their travel behavior and related activities may have changed in response to the pandemic.

PERSONAL ACTIVITIES For each of the activities shown in Figure 26, respondents were asked to report how many days they engaged in the activity during February 2020 (prior to the pandemic), June 2020 (during the pandemic), August 2021 (during pandemic), and their expectations once the pandemic is over. Because the number of days in these months are not equal, the figure reports the average *percentage* of days in each month that respondents reported engaging in the activity.

Question 13 *In the past month, approximately how many days during the month did you: ____?*

Question 26 *Thinking ahead to when the pandemic is over, approximately how many days in a typical month do you expect to: _____?*

FIGURE 26 PERCENTAGE OF DAYS PER MONTH PERFORMING PERSONAL ACTIVITIES: FEB 2020, JUN 2020, AUG 2021 & POST-PANDEMIC



In the first few months of the pandemic, Orange County residents made significant changes in their travel, shopping, and dining habits. With respect to travel behavior, the percentage of days they **drove alone** in a vehicle declined from 65% in February 2020 to 43% in June 2020, use of **on-demand rideshare** declined from 4.4% of days in February to 0.9% in June, **carpooling** with someone they don't live with declined from 4.3% of days in February to 1.5% in June, riding a **bus** declined from 3.3% of days on average in February to 0.9% in June, while riding **Metrolink** or **Amtrak** declined from 1.4% of days in February to 0.2% in June.

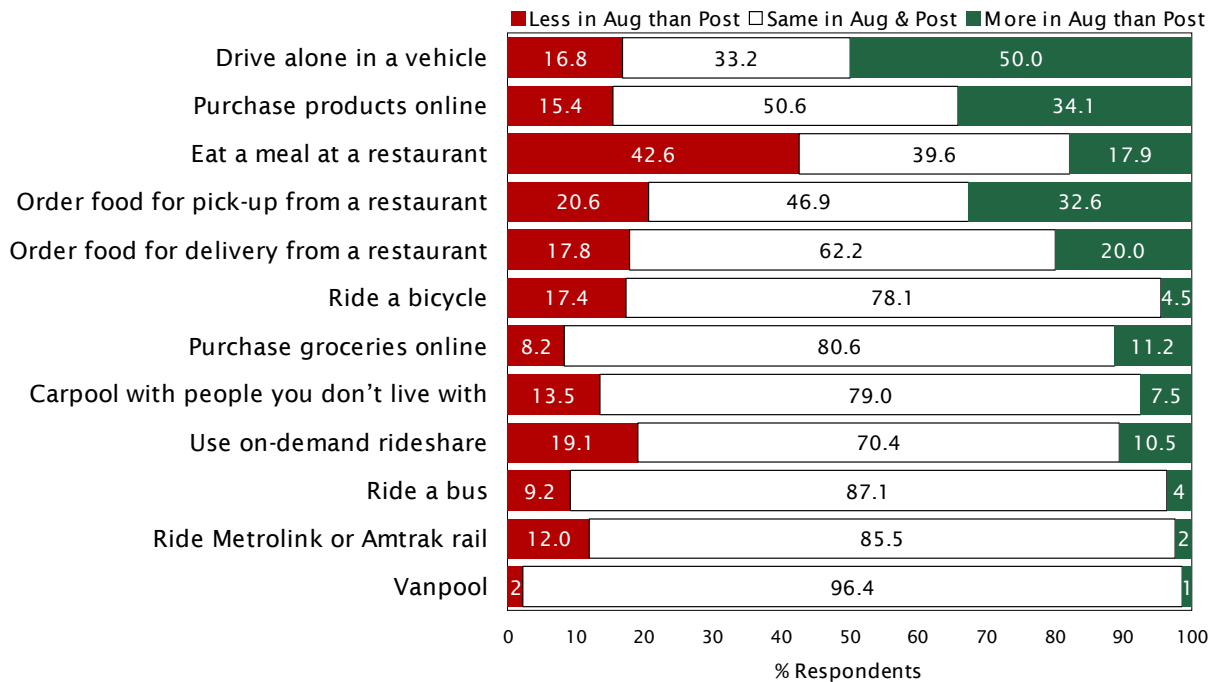
With respect to shopping and dining, the dramatic decline in the percentage of days respondents reported **eating a meal at a restaurant** (24% in February vs 5% in June) was only partially offset by an increase in the percentage of days they ordered food for **pick-up** (12% in February vs 17% in June) or **delivery** (6% in February vs 8% in June). When compared to the patterns in February, there was also a modest uptick in the percentage of days Orange County residents purchased **groceries online** (2% in February vs 5% in June) and **purchased other products online** (20% in February vs 25% in June).

By August 2021, many of the activities had bounced back toward pre-pandemic levels. When compared to June 2020, the percentage of days respondents **drove alone** in a vehicle increased from 43% to 56%, use of **on-demand rideshare** increased from 0.9% of days to 3.5%, **carpooling** with someone they don't live with increased from 1.5% to 3.5%, riding a **bus** increased from 0.9% of days to 2.8%, while riding **Metrolink** or **Amtrak** increased from 0.2% of days in June 2020 to 1% in August 2021. Interestingly, the changes in shopping and dining behavior between June 2020 and August 2021 were comparatively slight, with the exception of **eating a meal at a restaurant**, which increased from 4.5% of days in June 2020 to 17.2% of days in August 2021.

Looking ahead to the post-pandemic period, respondents anticipated small changes in the number of days they will engage in most activities when compared to August 2021, including purchasing products online (-4%), eating a meal at a restaurant (+3%), ordering food for pick-up from a restaurant (-2%), ordering food for delivery from a restaurant (-1%), purchasing groceries online (-0.5%), carpooling (+1%), using on-demand rideshare (+0.8%), riding a bus (+1%), riding Metro-link or Amtrak (+1%), and vanpooling (+0.2%). The one notable exception was a large decline in the percentage of days they anticipated driving alone in a vehicle (-20%) once the pandemic is over when compared to August 2021.

Figure 27 presents the information gathered in Questions 13 and 26 in a different format, noting the percentage of respondents who reported less, the same, or more days engaging in each activity in September 2021 when compared to what they expect once the pandemic is over. In many cases, the percentage who are doing *less* of an activity now vs. what they expect post-pandemic was offset by a similar percentage who anticipated they are doing *more* of the activity now. Activities in which the net difference was at least 10% included driving alone in a vehicle (net 33% more August), purchasing products online (net 19% more August), ordering food from a restaurant (net 12% more August), eating a meal at a restaurant (net 25% less August), riding a bicycle (net 13% less August), and riding Metrolink or Amtrak (net 10% less August).

FIGURE 27 PERSONAL ACTIVITIES: AUG 2021 VS POST-PANDEMIC



Finally, Figure 28 on the next page normalizes the comparison by noting the percentage *change* in expected days spent engaged in each activity between August 2021 and after the pandemic is over. The largest anticipated *increases* occurred with respect to riding Metrolink or Amtrak (+129%), vanpooling (+46%), and riding a bicycle (+44%). The largest anticipated *decreases* were reported for driving alone in a vehicle (-36%), ordering food for pick-up from a restaurant (-17%), and purchasing products online (-16%). Table 3 shows how the percentage change in expected days spent engaged in each activity once the pandemic is over varied by Supervisorial District.

FIGURE 28 PERCENTAGE CHANGE IN DAYS PER MONTH PERFORMING PERSONAL ACTIVITIES: AUG 2021 VS POST-PANDEMIC

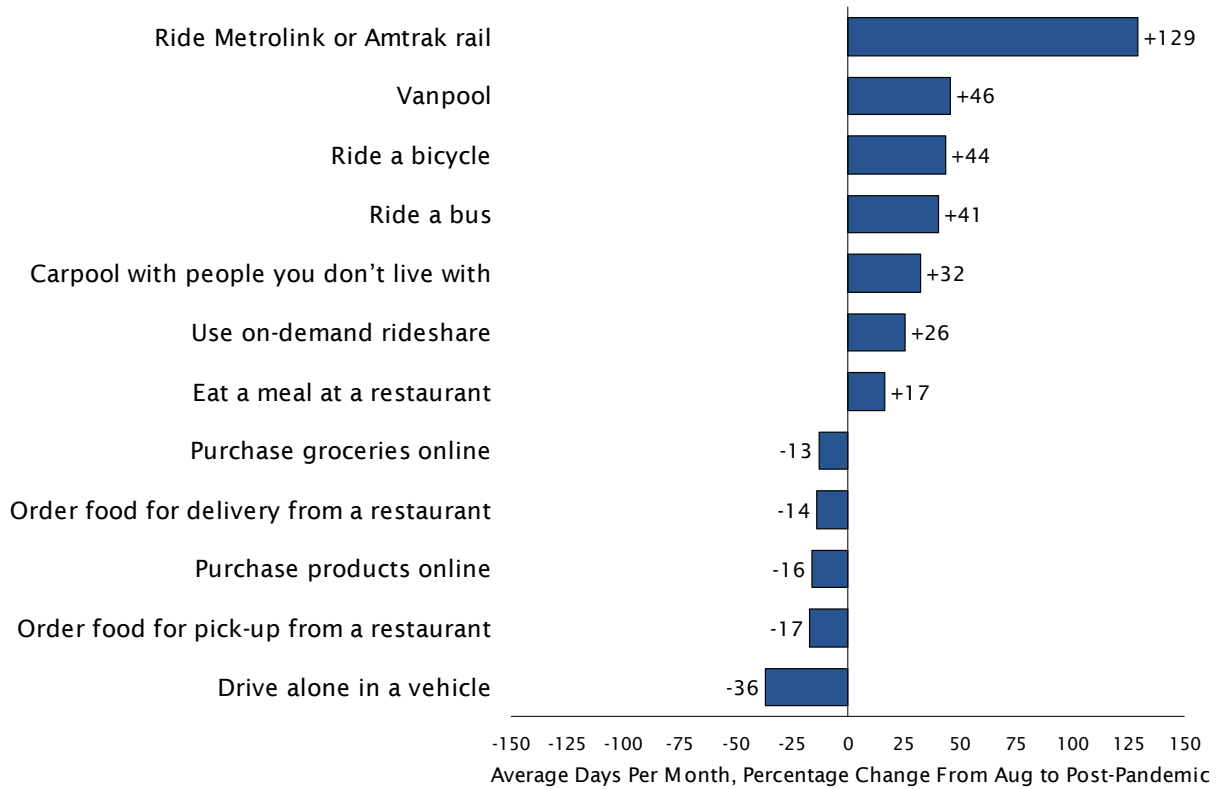


TABLE 3 PERCENTAGE CHANGE IN DAYS PER MONTH PERFORMING PERSONAL ACTIVITIES: AUG 2021 VS POST-PANDEMIC BY OVERALL & SUPERVISORIAL DISTRICT

	Overall	Supervisorial District				
		One	Two	Three	Four	Five
Ride Metrolink or Amtrak rail	+129	+61	+203	+450	+151	+62
Vanpool	+46	+11	+52	+93	+20	+237
Ride a bicycle	+44	+57	+29	+46	+67	+32
Ride a bus	+41	+71	+26	+72	+20	+12
Carpool with people you don't live with	+32	+31	+22	+65	+27	+27
Use on-demand rideshare	+26	+8	+50	+36	+2	+39
Eat a meal at a restaurant	+17	+15	+20	+20	+15	+12
Purchase groceries online	-13	-27	-12	+3	-12	-10
Order food for delivery from a restaurant	-14	-1	-15	-15	-29	-6
Purchase products online	-16	-18	-8	-20	-20	-15
Order food for pick-up from a restaurant	-17	-19	-19	-18	-14	-16
Drive alone in a vehicle	-36	-33	-36	-45	-27	-44

POST-PANDEMIC WORK ARRANGEMENTS

The final substantive questions of the survey focused on employees' anticipated post-pandemic work arrangements, including changes to the amount of time they expect to work from home, the extent to which their employers' preferences may be driving their expected remote work patterns, and whether they anticipate changing employers in the next year.

MORE OR LESS REMOTE WORK POST-PANDEMIC? To set the stage for the discussion in this section, figures 29-31 summarize employees' expectations for the amount they will be teleworking once the pandemic is over. The figures represent *all* employees, including those who are not currently teleworking. Overall, 75% of employees residing in Orange County expect that the amount they telework will be the same as now (September 2021) once the pandemic is over, whereas 22% expect to work fewer days from home post-pandemic, and 4% anticipate working more from home during this period. As shown in the figures, the higher the percentage of days an employee currently works from home and the higher their annual income, the more likely they are to expect they will *reduce* the amount of days working remotely once the pandemic is over.

FIGURE 29 POST-PANDEMIC TELEWORK STATUS AMONG ALL EMPLOYEES BY OVERALL & PERCENTAGE TELEWORK DAYS IN SEP

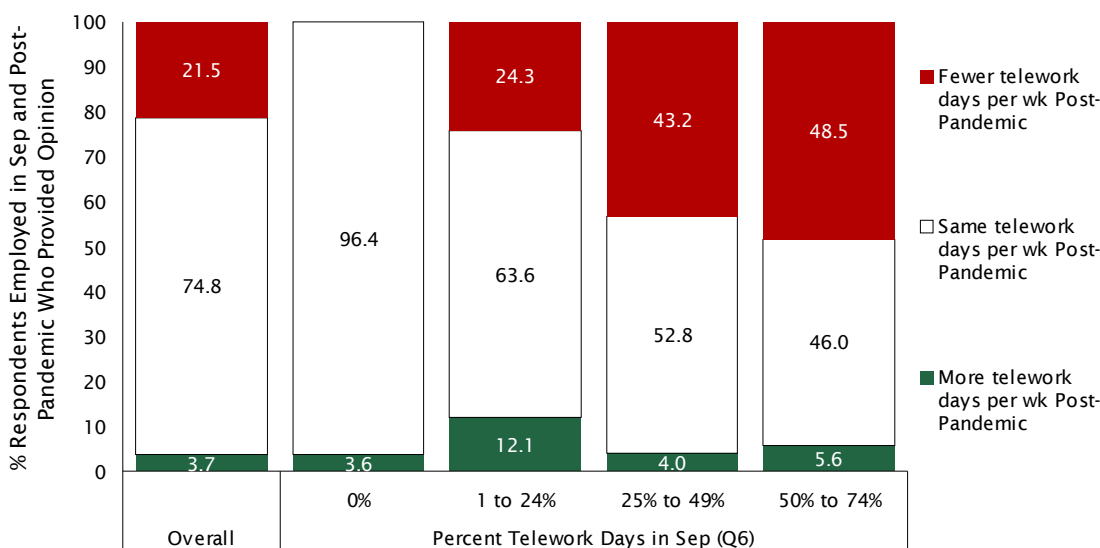


FIGURE 30 POST-PANDEMIC TELEWORK STATUS AMONG ALL EMPLOYEES BY SUPERVISORIAL DISTRICT

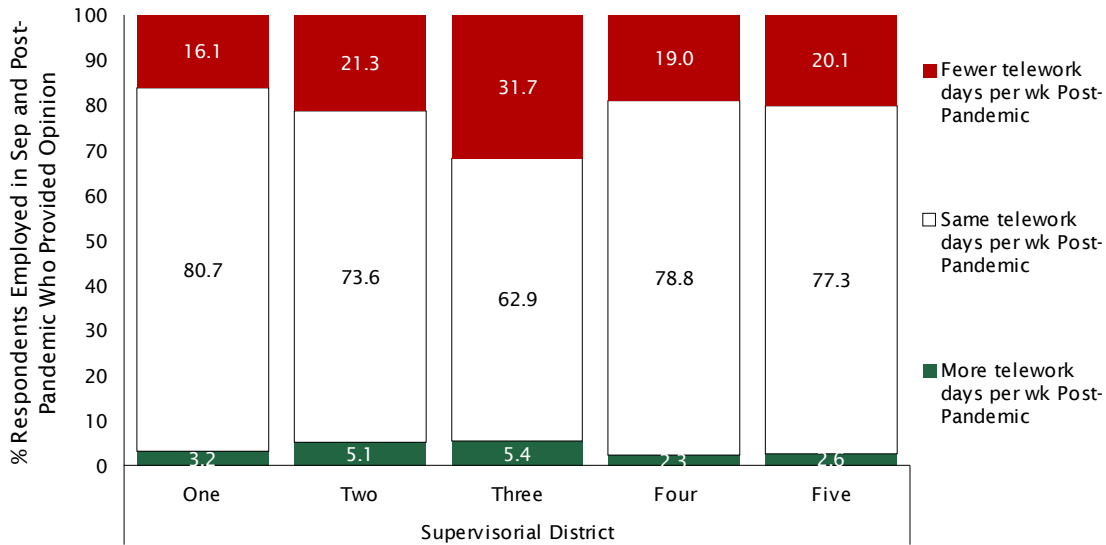
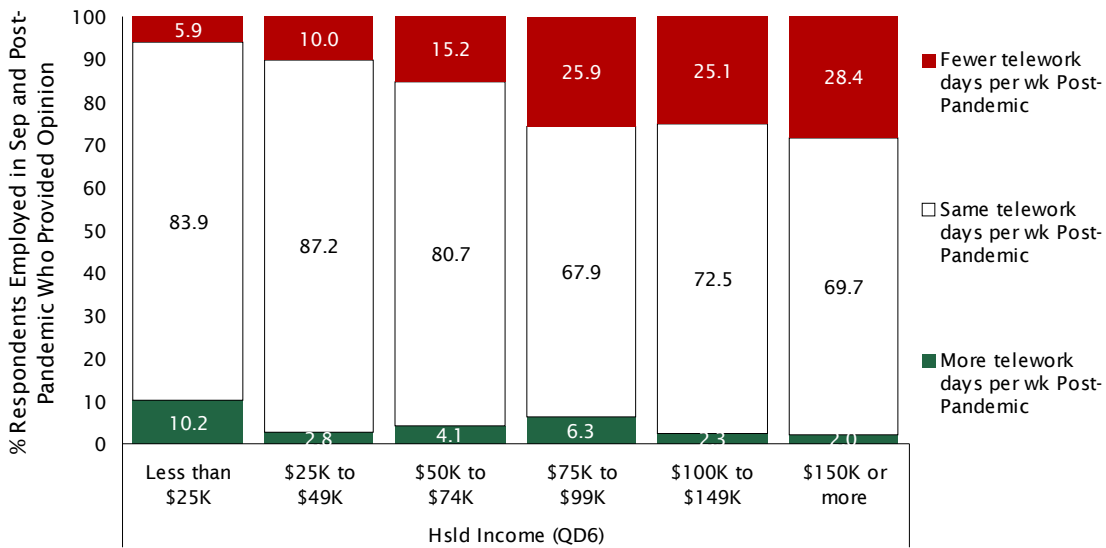


FIGURE 31 POST-PANDEMIC TELEWORK STATUS AMONG ALL EMPLOYEES BY HSLD INCOME



REMOTE WORK STATUS - EMPLOYEE'S PREFERENCE? Regardless of their expectations for how the amount they work from home may change after the pandemic, all employees were asked whether their anticipated post-pandemic remote work status is their preference. As shown in Figure 32 on the next page, there is a clear pattern between the type of change expected in their remote work status post-pandemic and whether employees' preferences dictated the outcome.

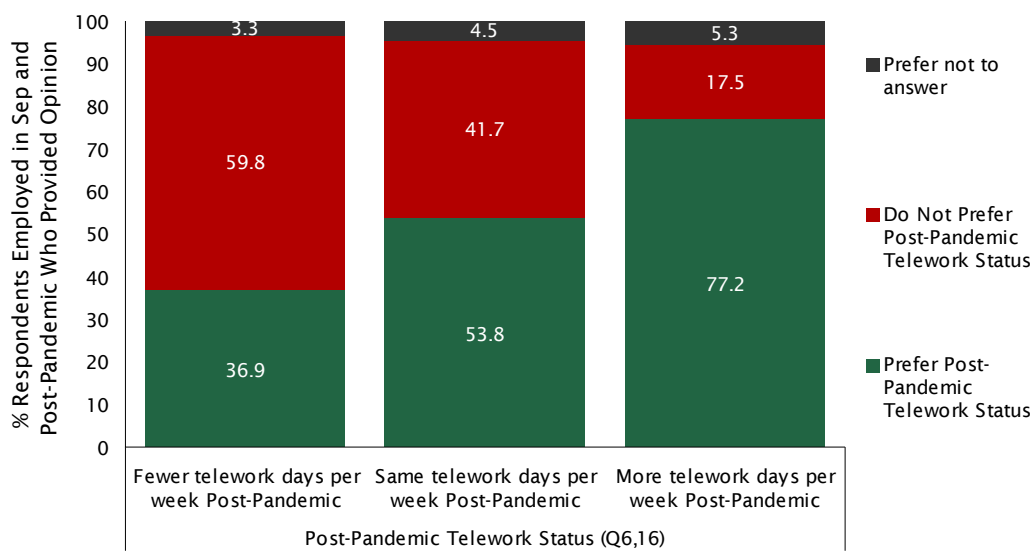
Among employees who anticipated working fewer days from home after the pandemic is over, just 37% indicated that this is their *preferred* outcome. Most employees (54%) who expected to maintain their current remote work patterns offered that this is their preference. Meanwhile, among employees who expected to work more often from home after the pandemic, 77% stated that they preferred this arrangement.

Question 18 You indicated that you expect to work fewer days from home after the pandemic when compared to your current schedule. Is this because you prefer to reduce the number of days you work from home?

Question 20 You indicated that you expect to work the same number of days from home after the pandemic when compared to your current schedule. Is this because you prefer to keep the number of days you work from home the same?

Question 22 You indicated that you expect to work more days from home after the pandemic when compared to your current schedule. Is this because you prefer to increase the amount of days you work from home?

FIGURE 32 POST-PANDEMIC TELEWORK STATUS

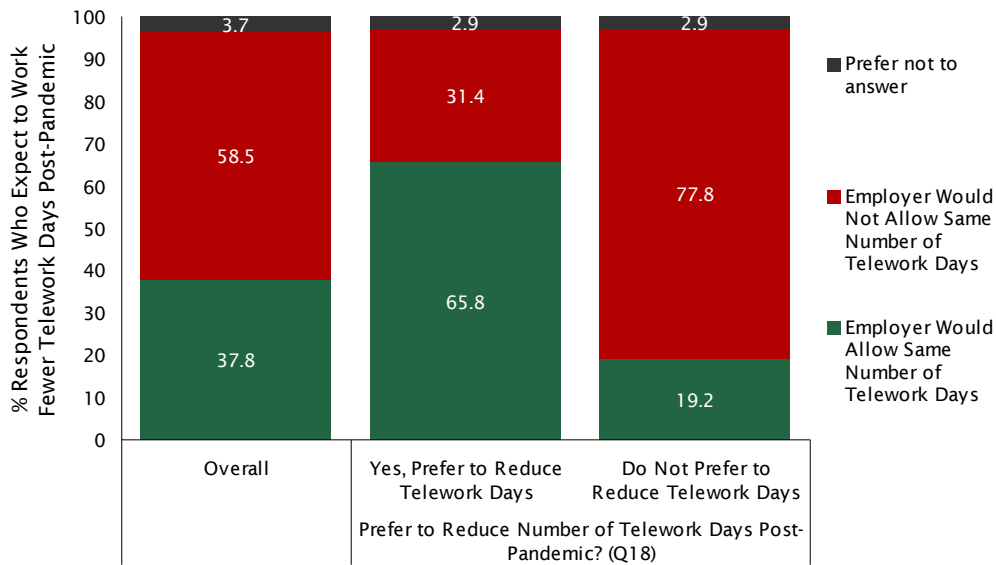


WORKING FEWER DAYS FROM HOME —EMPLOYER REQUIRED? Employees who indicated they anticipated working *fewer* days from home after the pandemic were subsequently asked if their employer would allow them to continue working from home the same number of days as their current schedule. Figure 33 on the next page shows that the most common answer to this question was no—their employer would not allow them to continue working from home as often as they do currently (59%). Approximately 38% of employees who expect to work from home less often post-pandemic indicated that this situation was not employer-driven, as their employer would continue to allow them to work from home the same number of days they do currently.

Figure 33 also shows the relationship between employees’ preferences and their employers’ when it comes to their post-pandemic work arrangements. Among those who anticipated working fewer days from home post-pandemic and preferred to do so, most (66%) indicated that their employer would have allowed them to continue working from home as often as their current schedule. Conversely, those who anticipated working less from home in the future and did *not* prefer this outcome were far more likely (78%) to report that their employer would not allow them to continue working from home as often as they do currently.

Question 19 After the pandemic, do you expect that your employer will allow you to continue working from home < insert from Q6 > days per week?

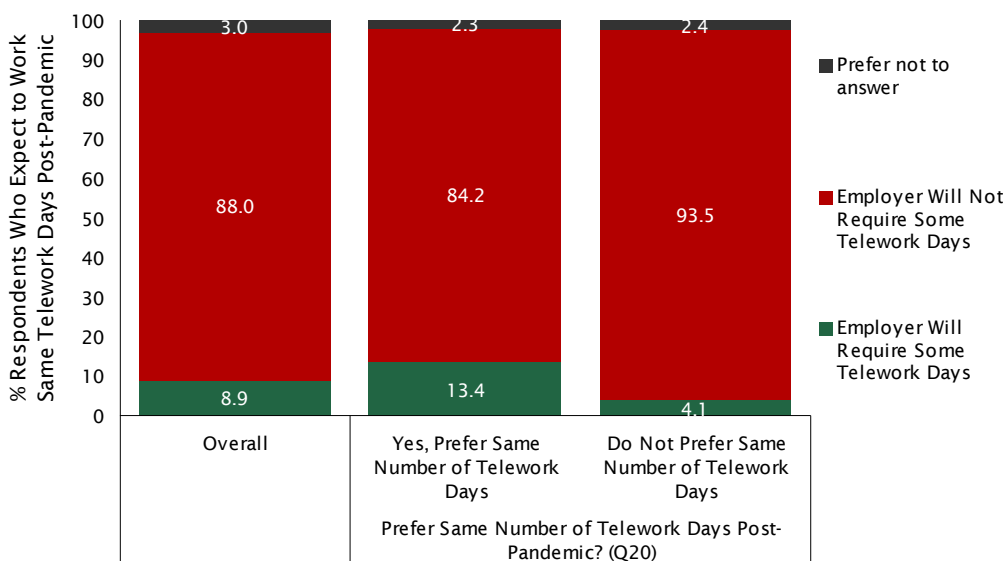
FIGURE 33 FEWER TELEWORK DAYS POST-PANDEMIC: EMPLOYER REQUIREMENT VS EMPLOYEE PREFERENCE



WORKING SAME DAYS FROM HOME—EMPLOYER REQUIRED? Employees who indicated they anticipated working the *same* number days from home after the pandemic were subsequently asked if their employer will be requiring employees to work from home at least part of the time during this period. Few employees in this situation (9%) indicated that remote work will be required by their employer and the percentage varied little according to the whether the employees did/did not prefer to work from home the same number of days post-pandemic.

Question 21 Has your employer indicated that - after the pandemic - employees must work from home at least part of the time?

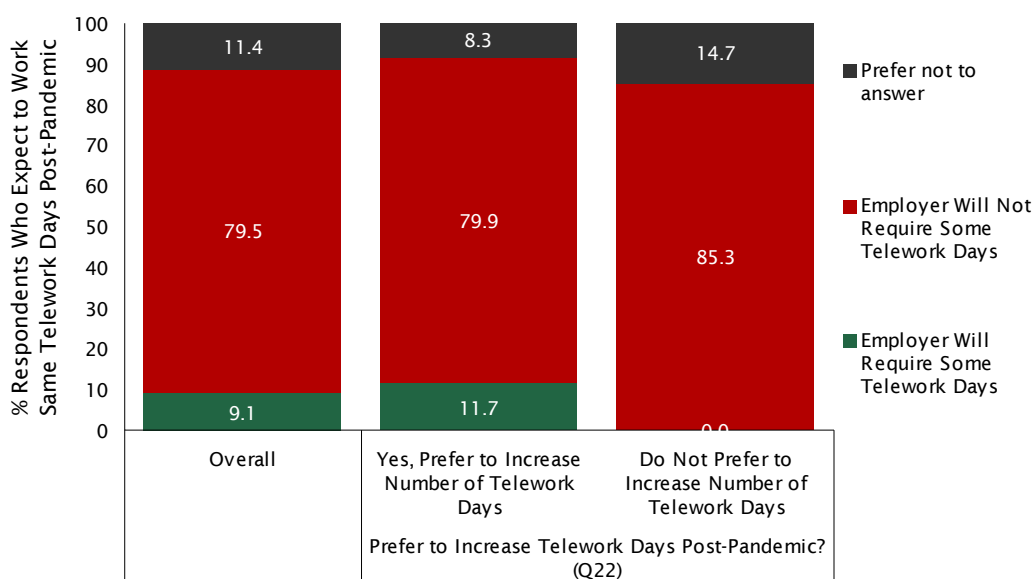
FIGURE 34 SAME NUMBER OF TELEWORK DAYS POST-PANDEMIC: EMPLOYER REQUIREMENT VS EMPLOYEE PREFERENCE



WORKING MORE DAYS FROM HOME—EMPLOYER REQUIRED? In a manner similar to that described above, employees who indicated they anticipated working *more* days from home after the pandemic were also asked if their employer will be requiring employees to work from home at least part of the time during this period. Overall, 9% of employees in this situation indicated that their employer will be requiring employees to work from home at least part of the time once the pandemic is over. It is worth noting, however, that none (0%) of the employees who indicated it wasn't their preference to increase the amount they work from home reported that their employer is requiring it.

Question 23 *Has your employer indicated that - after the pandemic - employees must work from home least part of the time?*

FIGURE 35 MORE TELEWORK DAYS POST-PANDEMIC: EMPLOYER REQUIREMENT VS EMPLOYEE PREFERENCE



DO YOU ANTICIPATE CHANGING EMPLOYERS? One of the unanticipated outcomes of the pandemic has been a sharp increase in the number of employees who are quitting their current jobs. Coined by economists as the *Great Resignation*, the Bureau of Labor Statistics reported that the number of employees who left their jobs in August 2021 was the highest ever recorded in the United States, and this followed several months of record-setting rates of resignations beginning in April 2021.

Accordingly, it was of interest to ask Orange County residents in the labor market whether they anticipated changing employers in the next 12 months and—if yes—to state the reason for their expected move. Overall, 16% of individuals anticipated that they will be changing their employer within the 12 months following the interview, and an additional 2% indicated they are currently employed but do not anticipate being employed when the pandemic is over. Overall, 70% of individuals indicated they anticipated staying with their current employer for the next 12 months, and this expectation was more common among residents of Supervisorial District 5, those 35 years of age or older, and those who reside in higher-earning (\$100,000+) households (see figures 36-38).

Question 24 Do you anticipate that you will change employers in the next 12 months?

FIGURE 36 EMPLOYMENT STATUS IN NEXT 12 MONTHS BY OVERALL & SUPERVISORIAL DISTRICT

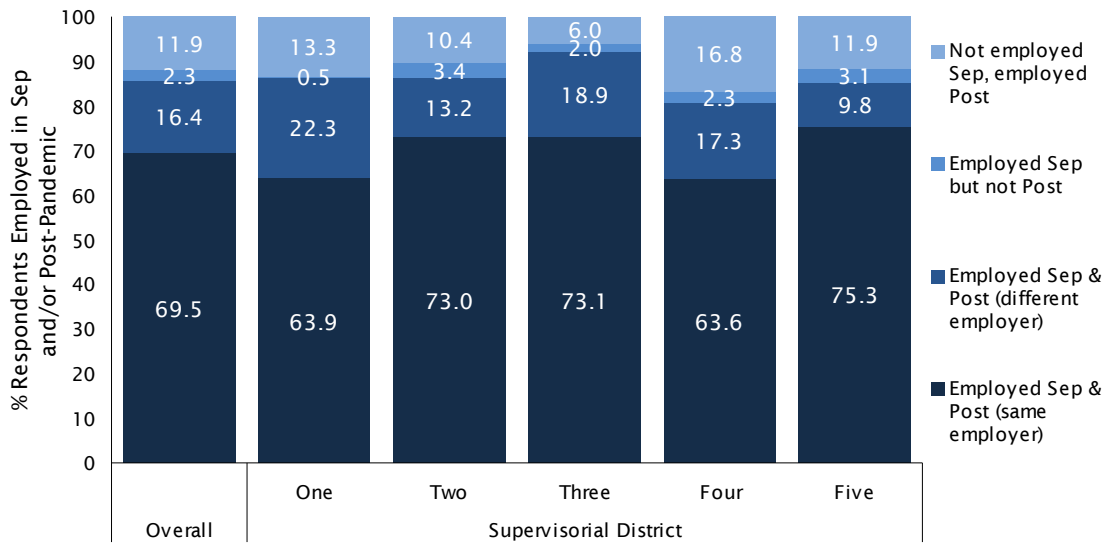


FIGURE 37 EMPLOYMENT STATUS IN NEXT 12 MONTHS BY AGE

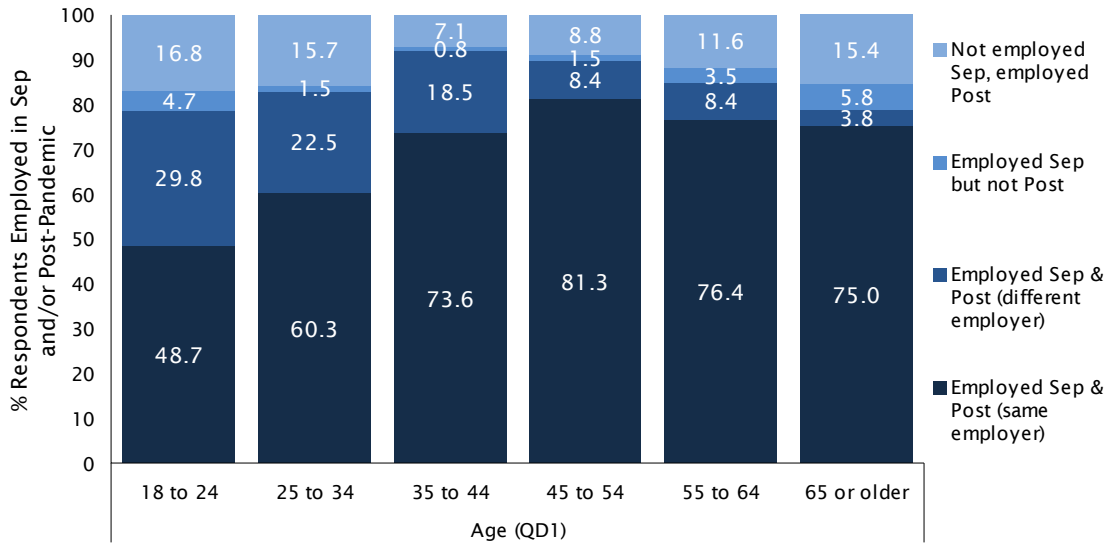
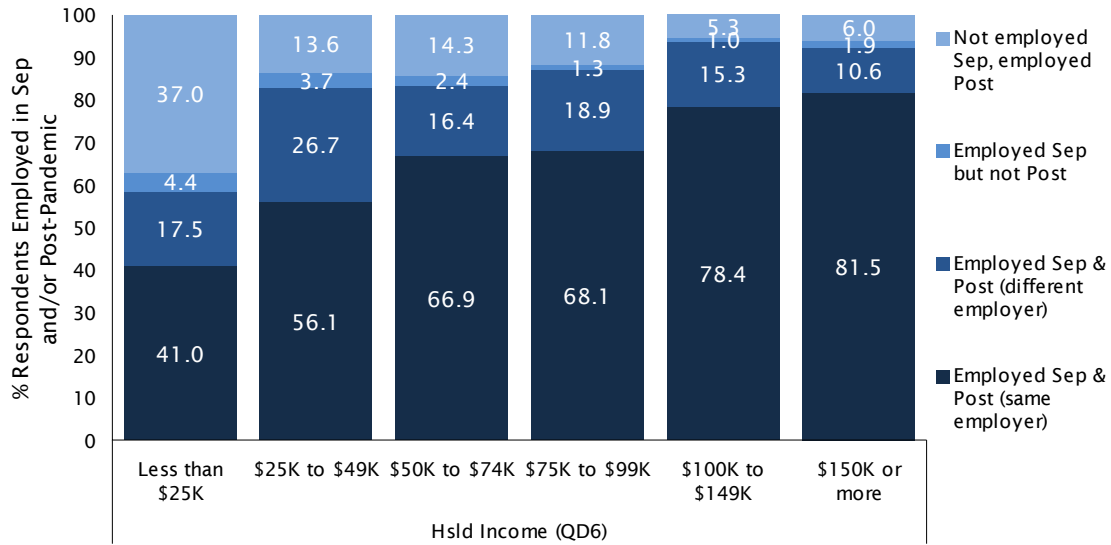


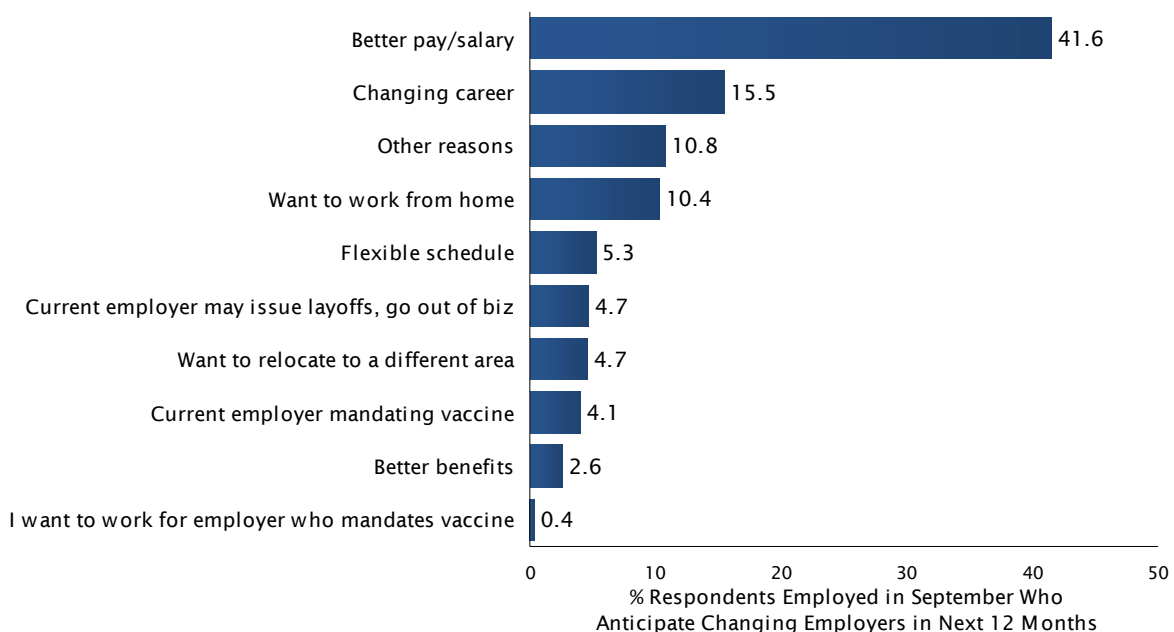
FIGURE 38 EMPLOYMENT STATUS IN NEXT 12 MONTHS BY HSLD INCOME



Those who anticipated changing employers in the next 12 months were subsequently asked in an open-ended manner to describe the *main* reason for their anticipated change (Figure 39). Although a desire for better pay/salary was the most common response (42%), others cited a change of career (16%), a desire to work from home (10%), and a desire to have a flexible schedule (5%) as their main reasons for seeking a new employer. It is also worth noting that 4% mentioned they expect to change employers because their current employer will be mandating the COVID-19 vaccine, whereas less than 1% sought to move to an employer that would require vaccines for all employees.

Question 25 *What is the main reason why you expect to change employers?*

FIGURE 39 MAIN REASON FOR CHANGING EMPLOYERS





BACKGROUND & DEMOGRAPHICS

TABLE 4 DEMOGRAPHICS OF SAMPLE BY STUDY VERSION

	Study Version	
	Baseline Jul 2020	Tracking Sep 2021
Total Respondents	2,548	2,119
Years in Orange County (Q1)		
Less than 3	3.9	4.1
3 to 4	5.2	4.7
5 to 9	9.7	11.3
10 to 14	7.2	8.6
15 or more	73.6	70.7
Prefer not to answer	0.4	0.7
Age (QD1)		
18 to 24	13.3	13.2
25 to 34	18.6	18.1
35 to 44	19.3	18.6
45 to 54	19.1	18.6
55 to 64	13.8	13.3
65 or older	14.5	17.2
Prefer not to answer	1.4	0.9
Gender (QD2)		
Male	48.7	45.5
Female	48.9	51.4
Other	0.6	0.8
Prefer not to answer	1.8	2.3
Access to Personal Vehicle (QD3)		
Always	90.8	88.1
Sometimes	4.2	6.2
Rarely, never	3.5	4.0
Prefer not to answer	1.5	1.7
Home Ownership Status (QD4)		
Rent	40.6	42.0
Own	53.4	52.6
Prefer not to answer	6.0	5.4
Ethnicity (QD5)		
Caucasian / White	37.5	37.3
Latino / Hispanic	32.1	32.0
Af Amer. / Black	2.2	1.8
Asian American	19.5	19.8
Mixed or other	3.6	3.1
Prefer not to answer	5.0	6.0
Hsld Income (QD6)		
Less than \$25K	7.8	10.0
\$25K to \$49K	15.6	14.2
\$50K to \$74K	17.4	16.5
\$75K to \$99K	16.1	16.6
\$100K to \$149K	16.0	14.4
\$150K or more	20.5	21.7
Prefer not to answer	6.6	6.6
Supervisorial District		
One	20.7	20.8
Two	21.2	21.5
Three	17.4	17.7
Four	21.3	21.3
Five	19.4	18.7

Table 4 presents the key demographic and background information that was collected during the survey. Although the primary motivation for collecting the background and demographic information was to provide a better insight into how the results of the substantive questions of the survey vary by demographic characteristics (see crosstabulations in Appendix A for a full breakdown of each question), the information is also valuable for understanding the current profile of Orange County's adult population. The sample profile matches Orange County's adult population profile on age, ethnicity, and homeownership based on the most recent Census American Community Survey (ACS) estimates, and is also balanced across cities and Supervisorial Districts.



M E T H O D O L O G Y

The following sections outline the methodology used in the study, as well as the motivation for using certain techniques.

QUESTIONNAIRE DEVELOPMENT Dr. McLarney of True North Research worked closely with OCTA to develop a questionnaire that covered the topics of interest and avoided the many possible sources of systematic measurement error including position-order effects, wording effects, response-category effects, scaling effects, and priming. Several questions included multiple individual items. Because asking the items in a set order can lead to a systematic position bias, the items were asked in a random order for each respondent.

Some questions asked in this study were presented only to a subset of respondents. For example, only respondents who reported that they were employed in September 2021 (Question 4) were asked follow-up questions about their work schedule (Question 5) and working from home (Question 6) during that month. The questionnaire included with this report (see *Questionnaire & Toplines* on page 42) identifies the skip patterns that were used during the interview to ensure that each respondent received the appropriate questions.

PROGRAMMING, PRE-TEST & TRANSLATION Prior to fielding the survey, the questionnaire was CATI (Computer Assisted Telephone Interviewing) programmed to assist interviewers when conducting the telephone interviews. The CATI program automatically navigates the skip patterns, randomizes the appropriate question items, and alerts the interviewer to certain types of keypunching mistakes should they occur. The survey was also programmed into a passcode-protected online survey application to allow online participation for sampled residents. The integrity of the questionnaire was pre-tested internally by True North and by dialing into random homes in Orange County prior to formally beginning the survey. Once finalized, the survey was professionally translated into Spanish and Vietnamese to give respondents the option of participating in English, Spanish, or Vietnamese.

SAMPLE, RECRUITING & DATA COLLECTION A comprehensive database of households within Orange County was utilized for this study, ensuring that all households had the opportunity to participate in the survey. From this master database, True North developed a stratified, random sample of residents to recruit to participate in the survey. Once selected at random, additional contact information (telephone and/or email) was appended to the sample using publicly available and private sources. Residents were recruited to participate in the survey using a combination of emailed invitations, text invitations, and/or telephone calls.⁵ Individuals that received an email or text invitation were invited to participate in the survey online at a secure, passcode-protected website designed and hosted by True North. Each sample record was assigned a unique passcode to ensure that only residents who received an invitation could access the online survey site, and that the survey could be completed one time only. Individuals that did not respond to an email or text invitation (or that only had telephone contact information) were recruited to participate in the survey by telephone (land line and/or cell phone).

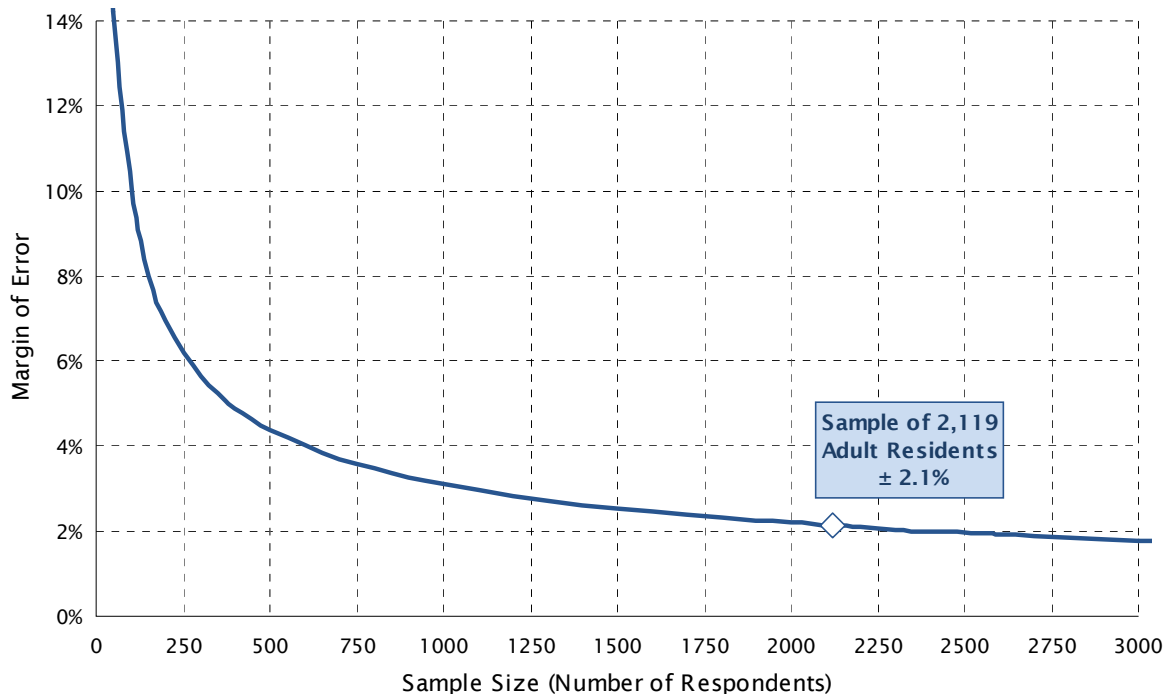
5. The recruiting method(s) selected for a respondent depended on the contact information that was available for that particular individual.

Telephone interviews averaged 15 minutes in length and were conducted during weekday evenings (5:30PM to 9PM) and on weekends (10AM to 5PM). It is standard practice not to call during the day on weekdays because most working adults are unavailable and thus calling during those hours would likely bias the sample. A total of 2,119 surveys were completed between September 2 and September 26, 2021.

STATISTICAL MARGIN OF ERROR By using a probability-based sample and monitoring the sample characteristics as data collection proceeded, True North ensured that the sample was representative of adult residents in Orange County. The results of the survey can thus be used to estimate the opinions of *all* adult residents in the County. Because not all adult residents participated in the survey, however, the results have what is known as a statistical margin of error due to sampling. The margin of error refers to the difference between what was found in the survey of 2,119 respondents for a particular question and what would have been found if all of the estimated 2,490,324 adult residents⁶ in Orange County had been interviewed.

Figure 40 provides a plot of the *maximum* margin of error in this study. The maximum margin of error for a dichotomous percentage result occurs when the answers are evenly split such that 50% provide one response and 50% provide the alternative response. For this survey, the maximum margin of error is $\pm 2.1\%$ for questions answered by all 2,119 respondents countywide.

FIGURE 40 MAXIMUM MARGIN OF ERROR DUE TO SAMPLING



Within this report, figures and tables show how responses to certain questions varied by sub-groups such as years living in Orange County, age of the respondent, and Supervisorial District. Figure 40 above is thus useful for understanding how the maximum margin of error for a per-

6. Source: adult population estimate derived from the California Department of Finance's 2021 estimate for Orange County's total population and U.S. Census Bureau age profile for Orange County for July 2019.

centage estimate will grow as the number of individuals asked a question (or in a particular subgroup) shrinks. Because the margin of error grows exponentially as the sample size decreases, the reader should use caution when generalizing and interpreting the results for small subgroups.

DATA PROCESSING Data processing consisted of checking the data for errors or inconsistencies, coding and recoding responses, categorizing open-ended responses, and preparing frequency analyses and crosstabulations. The final data were weighted to adjust for minor discrepancies in age and ethnicity within each of the five Supervisorial Districts.

ROUNDING Numbers that end in 0.5 or higher are rounded up to the nearest whole number, whereas numbers that end in 0.4 or lower are rounded down to the nearest whole number. These same rounding rules are also applied, when needed, to arrive at numbers that include a decimal place in constructing figures and charts. Occasionally, these rounding rules lead to small discrepancies in the first decimal place when comparing tables and pie charts for a given question.

QUESTIONNAIRE & TOPLINES



OCTA
 Employment & Travel Survey Tracker
 Final Toplines (n = 2,119)
 September 30, 2021

Section 1: Introduction to Study

Standard Intro: Hi, may I please speak to: _____. Hi, my name is _____ and I'm calling from TNR on behalf of OCTA (Oh-See-Tee-Ay) – the Orange County Transportation Authority. We're conducting a survey about important issues in Orange County and I'd like to get your opinions.

If Land Line, no name on file: Hi, my name is _____ and I'm calling from TNR on behalf of OCTA (Oh-See-Tee-Ay) – the Orange County Transportation Authority. We're conducting a survey about important issues in Orange County and I'd like to get your opinions.

If needed: This is a survey about important issues in your community. I'm NOT trying to sell anything and I won't ask for a donation. Your responses will be confidential.

If needed: The survey should take about 12 minutes to complete.

If needed: If now is not a convenient time, can you let me know a better time so I can call back? You can also take the survey online if you prefer.

Section 2: Screener for Inclusion if Land Line & No Name

For statistical reasons, I would like to speak to the youngest adult male currently at home that is at least 18 years of age. *If there is no male currently at home that is at least 18 years of age, then ask:* Ok, then I'd like to speak to the youngest female currently at home that is at least 18 years of age.

If there is no adult currently available, then ask for a callback time.

NOTE: Adjust this screener as needed to match sample quotas on gender & age

If respondent asks why we want to speak to a particular demographic group, explain: Its important that the sample of people for the survey is representative of the adult population in Orange County for it to be statistically reliable. At this point, we need to balance our sample by asking for people who fit a particular demographic profile.

Section 3: Local Issues & the Pandemic

Q1	To begin, how long have you lived in Orange County?		
1	Less than 1 year		1%
2	1 to 2 years		3%
3	3 to 4 years		5%
4	5 to 9 years		11%
5	10 to 14 years		9%
6	15 years or longer		71%
99	Prefer not to answer		1%

Q2	Thinking about Orange County as a whole, what would you say is the most important issue facing Orange County today? Verbatim responses recorded and later grouped into categories shown below.	
	Homelessness	22%
	Housing availability, affordability	15%
	Not sure, cannot think of anything	14%
	COVID-19 concerns, issues	12%
	Traffic congestion	9%
	Public safety, drugs, crime	6%
	Cost of living	4%
	Public transportation	4%
	Economy, unemployment	3%
	Political division	3%
	Education, schools	2%
	High taxes	2%
	Illegal immigration issues	2%
	Population, overcrowding	2%
	Leadership, government	2%
	Environmental issues, concerns	2%
	Development, loss of open space	2%
	Infrastructure maintenance, repair	2%
	Racial, cultural diversity, inequality issues	2%
	Cleanliness, landscaping	1%
	Public health, well being	1%
	Voter fraud issues	1%
	High gas prices	1%
	Water supply issues, concerns, drought	1%
	Income inequality	1%
	Ongoing road construction projects	1%
	Loss of freedom, constitutional rights	1%
	None, no issues	1%

Q3	Which comes closer to your view about where Orange County stands in the coronavirus outbreak: the worst is behind us OR the worst is yet to come?		
	1	Worst is behind us	53%
	2	Worst is yet to come	21%
	98	Not sure	25%
	99	Prefer not to answer	1%

Section 4: Current Employment & Commute

We're interested in how your activities may have changed in response to the pandemic. First, let me ask about your **current** situation.

Q4	Which best describes your current employment status? Are you employed full-time, employed part-time, self-employed, laid-off or furloughed, not employed but looking for work, a student, a homemaker, or retired?			
	1	Employed full-time	46%	Ask Q5
	2	Employed part-time	9%	Ask Q5
	3	Self-employed	7%	Ask Q5
	4	Laid-off/furloughed	2%	Skip to Q13
	5	Not employed, but looking for work	5%	Skip to Q13
	6	Student	6%	Skip to Q13
	7	Homemaker	4%	Skip to Q13
	8	Retired	17%	Skip to Q13
	99	Prefer not to answer	3%	Skip to Q13
Q5	How many days per week do you typically work?			
	1	One	1%	
	2	Two	2%	
	3	Three	5%	
	4	Four	8%	
	5	Five	72%	
	6	Six	10%	
	7	Seven	3%	
	99	Prefer not to answer	0%	

Q6	Of the < insert from Q5 > days per week you typically work, how many of these days do you primarily work from home ?		
	0	None	52%
	1	One	5%
	2	Two	5%
	3	Three	5%
	4	Four	6%
	5	Five	25%
	6	Six	2%
	7	Seven	1%
	99	Prefer not to answer	0%
<i>Ask Q7 and Q8 if number days reported in Q6 is less than Q5.</i>			
Q7	When you commute to a work destination outside of your home, how do you typically commute to work? <i>If they say they use multiple transportation methods, ask: Which do you use for the <u>longest</u> portion of your commute?</i>		
	<i>If they say drive, car, etc. ask: Do you most often drive by yourself or with other people in the vehicle?</i>		
	1	Drive alone (car, truck, SUV, or van)	85%
	2	Carpool (ride together 2 to 4 people)	5%
	3	Vanpool (ride together with 5 to 15 people)	0%
	4	Motorcycle/Moped	0%
	5	E-bike/electric scooter	1%
	6	On-demand rideshare service like Uber or Lyft	0%
	7	Taxi	0%
	Public Transit		
	8	Bus	4%
	9	Metrolink/Amtrak rail	1%
	10	Other public transit	0%
	11	Bicycle	1%
	12	Walk/jog/run	1%
	13	Other	1%
	99	Prefer not to answer	0%

Q8	In miles, what is the approximate one-way commute distance between your home and your place of work? <i>If respondent not sure, ask them to estimate.</i>	
	<i>Average miles</i>	<i>18.54</i>
1	Less than 3	10%
2	3 to 5	13%
3	6 to 10	23%
4	11 to 15	15%
5	16 to 25	17%
6	26 to 40	11%
7	More than 40	7%
99	Prefer not to answer	4%
<i>Ask Q9 if 0 = 0. Otherwise skip to Q10.</i>		
Q9	Does your employer currently give you the option to work from home at least one day per week?	
1	Yes	9%
2	No	89%
98	Not sure	1%
99	Prefer not to answer	1%
Q10	What industry do you work in? <i>If hesitates, ask: What does your company do? Verbatim responses recorded and later grouped into categories shown below.</i>	
	Professional, Scientific and Technical Services	16%
	Health Care and Social Assistance	14%
	Retail Trade	8%
	Finance and Insurance	8%
	Educational Services	7%
	Public Administration	7%
	Prefer not to answer	6%
	Manufacturing	5%
	Other Services (except Public Administration)	5%
	Transportation and Warehousing	4%
	Accommodation and Food Services	4%
	Construction	4%
	Real Estate and Rental and Leasing	3%
	Administrative and Support and Waste Management and Remediation Services	3%

	Information	2%
	Arts, Entertainment and Recreation	2%
	Utilities	1%
	Wholesale Trade	1%
Q11	What is your occupation ? <i>If hesitates, ask: What type of work do you do?</i> Verbatim responses recorded and later grouped into categories shown below.	
	Management occupations	17%
	Prefer not to answer	10%
	Business and financial operations occupations	9%
	Sales and related occupations	9%
	Office and administrative support occupations	7%
	Architecture and engineering occupations	6%
	Healthcare practitioner and technical occupations	6%
	Education, training, and library occupations	5%
	Production occupations	4%
	Computer and mathematical science occupations	3%
	Arts, design, entertainment, sports, and media occupations	3%
	Personal care and service occupations	3%
	Transportation and material moving occupations	3%
	Community and social service occupations	2%
	Legal occupations	2%
	Protective service occupations	2%
	Food preparation and serving related occupations	2%
	Installation, maintenance, and repair occupations	2%
	Life, physical, and social science occupations	1%
	Healthcare support occupations	1%
	Building and grounds cleaning and maintenance occupations	1%
	Construction and extraction occupations	1%
	Armed Forces	1%

Ask Q12 if Q6 > 0. Otherwise skip to Q13.

Q12		Next are a few questions about your experiences working from home during the past year. In general, do you find that working from home has helped, had no impact, or hurt: _____? <i>If helped or hurt, ask: Would you say it has (helped/hurt) a lot or somewhat?</i>						
	<i>Randomize</i>	Helped a lot	Helped somewhat	No Impact	Hurt somewhat	Hurt a lot	Not Sure	Prefer not to answer
A	Your satisfaction with your job	34%	22%	29%	7%	6%	1%	1%
B	Your ability to collaborate with other employees	15%	7%	41%	26%	9%	1%	1%
C	Your ability to communicate with other employees	16%	9%	43%	24%	6%	0%	1%
D	The quality of your work	27%	18%	42%	9%	3%	0%	1%
E	Your productivity	31%	22%	27%	12%	7%	0%	1%
F	Your ability to strike the right balance between work and your personal life	38%	22%	18%	14%	8%	0%	1%
G	Your expenses	42%	29%	18%	5%	5%	0%	0%
H	Your ability to manage your time	37%	20%	25%	12%	6%	1%	1%
I	Your ability to communicate with external customers or partners	17%	9%	52%	13%	8%	1%	1%

Section 5: Current Activities

Q13		In the past month - August 2021 - approximately how many days during the month did you: _____?					
	<i>Read in Order</i>	Average Days	None	1 to 3	4 to 8	9 to 16	More than 16
A	Ride Metrolink or Amtrak rail	0.30	92%	6%	1%	1%	0%
B	Ride a bus	0.88	90%	4%	2%	2%	2%
C	Use an on-demand rideshare service like Uber or Lyft	1.05	69%	22%	7%	2%	1%
D	Carpool with people you don't live with	1.08	77%	14%	5%	3%	1%
E	Vanpool	0.21	97%	2%	1%	0%	0%
F	Ride a bicycle	1.75	76%	10%	6%	4%	3%
G	Drive alone in a vehicle	17.34	10%	6%	12%	18%	54%
H	Purchase products online	7.49	9%	23%	33%	26%	9%
I	Purchase groceries online	1.45	71%	15%	11%	2%	2%
J	Eat a meal at a restaurant	5.33	17%	29%	33%	16%	5%
K	Order food for pick-up from a restaurant	4.70	23%	31%	27%	15%	4%
L	Order food for delivery from a restaurant	2.50	53%	26%	13%	6%	3%

Section 6: Post-Pandemic Employment & Commute

Next, let me ask you about the future, **when the pandemic is over**. If you aren't sure about an answer, please give me your best estimate.

Q14 When the pandemic is over, do you expect to be employed full-time, employed part-time, self-employed, laid-off or furloughed, not employed but looking for work, a student, a homemaker, or retired?

1	Employed full-time	54%	Ask Q15
2	Employed part-time	9%	Ask Q15
3	Self-employed	6%	Ask Q15
4	Laid-off/furloughed	0%	Skip to Q26
5	Not employed, but looking for work	2%	Skip to Q26
6	Student	5%	Skip to Q26
7	Homemaker	3%	Skip to Q26
8	Retired	18%	Skip to Q26
99	Prefer not to answer	2%	Skip to Q26

Summary of Employment Status, September & Post-Pandemic (Q4 and Q14)

1	Employed Sep & Post-pandemic	61%
2	Not employed Sep & Post-pandemic	26%
3	Employed Sep but not Post-pandemic	2%
4	Not employed Sep, employed Post-pandemic	8%
5	Refused one or both questions	4%

Q15 After the pandemic is over, how many days per week do you expect to work?

1	One	1%
2	Two	2%
3	Three	5%
4	Four	7%
5	Five	74%
6	Six	8%
7	Seven	4%
99	Prefer not to answer	0%

<i>Summary of Days Worked per Week, September vs Post-Pandemic (Q5 and Q15)</i>				
			<i>All Respondents</i>	<i>Respondents Employed in September</i>
	1	More days per week Post-pandemic	13%	7%
	2	Same days per week Post-pandemic	79%	84%
	3	Fewer days per week Post-pandemic	5%	8%
	4	Refused one or both questions	4%	1%
Q16	Of the < insert from Q15 > days per week you expect to work, how many of these days do you expect to primarily work from home after the pandemic?			
	0	None		56%
	1	One		5%
	2	Two		8%
	3	Three		9%
	4	Four		5%
	5	Five		14%
	6	Six		1%
	7	Seven		1%
	99	Prefer not to answer		0%
<i>Summary of Days Worked From Home per Week, September vs Post-Pandemic (Q6 and Q16)</i>				
			<i>All Respondents</i>	<i>Respondents Employed in September</i>
	1	More days per week Post-pandemic	6%	4%
	2	Same days per week Post-pandemic	77%	74%
	3	Fewer days per week Post-pandemic	14%	22%
	4	Refused one or both questions	4%	1%

<i>Ask Q17 if number days reported in Q16 < Q15.</i>		
Q17	When you commute to a work destination outside of your home, how will you typically commute to work once the pandemic is over ? <i>If they say they use multiple transportation methods, ask: Which will you use for the <u>longest</u> portion of your commute?</i>	
	<i>If they say drive, car, etc. ask: Will you most often drive by yourself or with other people in the vehicle?</i>	
	1	Drive alone (car, truck, SUV, or van) 84%
	2	Carpool (ride together 2 to 4 people) 5%
	3	Vanpool (ride together with 5 to 15 people) 0%
	4	Motorcycle/Moped 0%
	5	E-bike/electric scooter 1%
	6	On-demand rideshare service like Uber or Lyft 0%
	7	Taxi 0%
	Public Transit	
	8	Bus 4%
	9	Metrolink/Amtrak rail 1%
	10	Other public transit 0%
	11	Bicycle 1%
	12	Walk/jog/run 1%
	13	Other 1%
	99	Prefer not to answer 1%
<i>Ask Q18 if Q16 < Q6. Otherwise skip to instruction preceding Q20.</i>		
Q18	You indicated that you expect to work <i>fewer</i> days from home after the pandemic when compared to your current schedule. Is this because you <i>prefer</i> to reduce the number of days you work from home?	
	1	Yes 37%
	2	No 60%
	99	Prefer not to answer 3%
Q19	After the pandemic, do you expect that your employer will <i>allow</i> you to continue working from home < insert from 0 > days per week?	
	1	Yes 38%
	2	No 59%
	99	Prefer not to answer 4%

<i>Ask Q20 If Q16 = Q6. Otherwise skip to instruction preceding Q22.</i>				
Q20	You indicated that you expect to work the <i>same</i> number of days from home after the pandemic when compared to your current schedule. Is this because you <i>prefer</i> to keep the number of days you work from home the same?			
	1	Yes	54%	
	2	No	42%	
	99	Prefer not to answer	4%	
Q21	Has your employer indicated that - after the pandemic - employees <i>must</i> work from home at least part of the time?			
	1	Yes	9%	
	2	No	88%	
	99	Prefer not to answer	3%	
<i>Ask Q22 if Q16 > Q6 Otherwise skip to instruction preceding Q24.</i>				
Q22	You indicated that you expect to work <i>more</i> days from home after the pandemic when compared to your current schedule. Is this because you <i>prefer</i> to increase the amount of days you work from home?			
	1	Yes	53%	
	2	No	35%	
	99	Prefer not to answer	12%	
Q23	Has your employer indicated that - after the pandemic - employees <i>must</i> work from home least part of the time?			
	1	Yes	5%	
	2	No	81%	
	99	Prefer not to answer	14%	
<i>Ask Q24 if Q14 = (1,2,3). Otherwise skip to Q26.</i>				
Q24	Do you anticipate that you will change employers in the next 12 months?			
	1	Yes	22%	Ask Q25
	2	No	72%	Skip to Q26
	99	Prefer not to answer	6%	Skip to Q26

Q25	What is the main reason why you expect to change employers?	
1	Better pay/salary	40%
2	Better benefits	3%
3	Flexible schedule	5%
4	Want to work from home	10%
5	Changing career	15%
6	Want to relocate to a different area	5%
7	Current employer may issue layoffs or go out of business	5%
8	Current employer is mandating vaccine	4%
9	I want to work for employer who mandates vaccine	0%
10	Other	11%
99	Prefer not to answer	3%

Section 7: Post-Pandemic Activities

Q26	Thinking ahead to when the pandemic is over , approximately how many days in a typical month do you expect to: _____?	Average Days	None	1 to 3	4 to 8	9 to 16	More than 16	Less in Aug than Post	Same amount, Aug & Post	More in Aug than Post
	<i>Read in Order</i>									
A	Ride Metrolink or Amtrak rail	0.63	84%	11%	3%	1%	1%	12%	86%	2%
B	Ride a bus	1.19	86%	6%	4%	2%	3%	9%	87%	4%
C	Use an on-demand rideshare service like Uber or Lyft	1.34	65%	22%	10%	2%	1%	19%	70%	11%
D	Carpool with people you don't live with	1.39	74%	13%	9%	3%	1%	14%	79%	7%
E	Vanpool	0.26	96%	2%	1%	0%	0%	2%	96%	1%
F	Ride a bicycle	2.54	69%	10%	10%	7%	4%	17%	78%	5%
G	Drive alone in a vehicle	11.00	28%	15%	14%	11%	32%	17%	33%	50%
H	Purchase products online	6.37	8%	29%	35%	22%	6%	15%	51%	34%
I	Purchase groceries online	1.30	72%	15%	10%	2%	1%	8%	81%	11%
J	Eat a meal at a restaurant	6.21	6%	26%	45%	19%	5%	43%	40%	18%
K	Order food for pick-up from a restaurant	3.98	24%	35%	28%	11%	2%	21%	47%	33%
L	Order food for delivery from a restaurant	2.23	51%	30%	13%	5%	2%	18%	62%	20%

Section 8: Background & Demographics		
Thank you so much for your participation. I have just a few background questions for statistical purposes.		
D1	In what year were you born? Year recorded and grouped into age categories shown below.	
	18 to 24	13%
	25 to 34	18%
	35 to 44	19%
	45 to 54	19%
	55 to 64	13%
	65 or older	17%
	Prefer not to answer	1%
D2	What is your gender?	
	1 Male	45%
	2 Female	51%
	3 Other	1%
	99 Prefer not to answer	2%
D3	How would you describe your access to a personal vehicle? Would you say you always have access, sometimes have access, rarely have access, or never have access to a personal vehicle?	
	1 Always	88%
	2 Sometimes	6%
	3 Rarely	1%
	4 Never	3%
	99 Prefer not to answer	2%
D4	Do you rent or own your home?	
	1 Rent	42%
	2 Own	53%
	99 Prefer not to answer	5%

D5	What ethnic group do you consider yourself a part of or feel closest to? <i>Read list if respondent hesitates</i>	
	1	Caucasian/White 37%
	2	Latino/Hispanic 32%
	3	African-American/Black 2%
	4	American Indian or Alaskan Native <1%
	5	Asian -- Korean, Japanese, Chinese, Vietnamese, Filipino or other Asian 20%
	6	Pacific Islander <1%
	7	Middle Eastern 1%
	8	Mixed Heritage 2%
	98	Other <1%
	99	Prefer not to answer 6%
D6	I have just one more question for you for statistical reasons. I am going to read some income categories. Please stop me when I reach the category that best describes your total household income.	
	1	Less than \$25,000 10%
	2	\$25,000 to less than \$50,000 14%
	3	\$50,000 to less than \$75,000 17%
	4	\$75,000 to less than \$100,000 17%
	5	\$100,000 to less than \$150,000 14%
	6	\$150,000 or more 22%
	98	Not sure 0%
	99	Prefer not to answer 6%

Those are all of the questions that I have for you! Thanks very much for participating.

Post Interview Items

S1	Supervisory District	
	1	One 21%
	2	Two 22%
	3	Three 18%
	4	Four 21%
	5	Five 19%