

Employment and Travel 2022 Tracking Survey Results

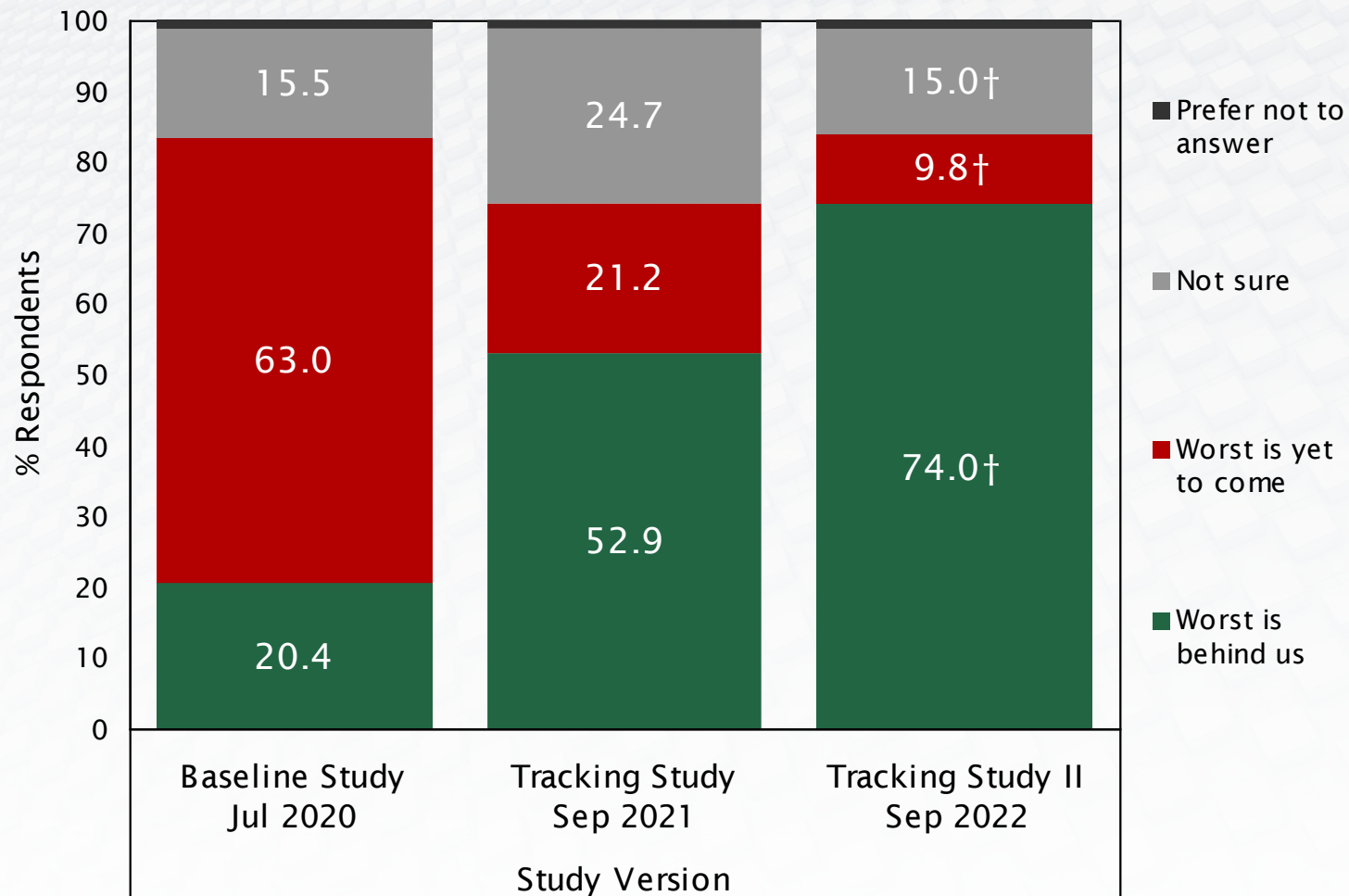
Purpose of Study

- Measure how the coronavirus (COVID-19) pandemic altered public attitudes, working arrangements, travel behaviors, mode choice, rideshare, and trips in short-term (three months into the pandemic).
- Identify degree to which changes have endured 18 and 30 months into pandemic.
- Profile pros/cons of remote work from employees' perspectives.
- Explore employees' expectations regarding future work arrangements and commutes.

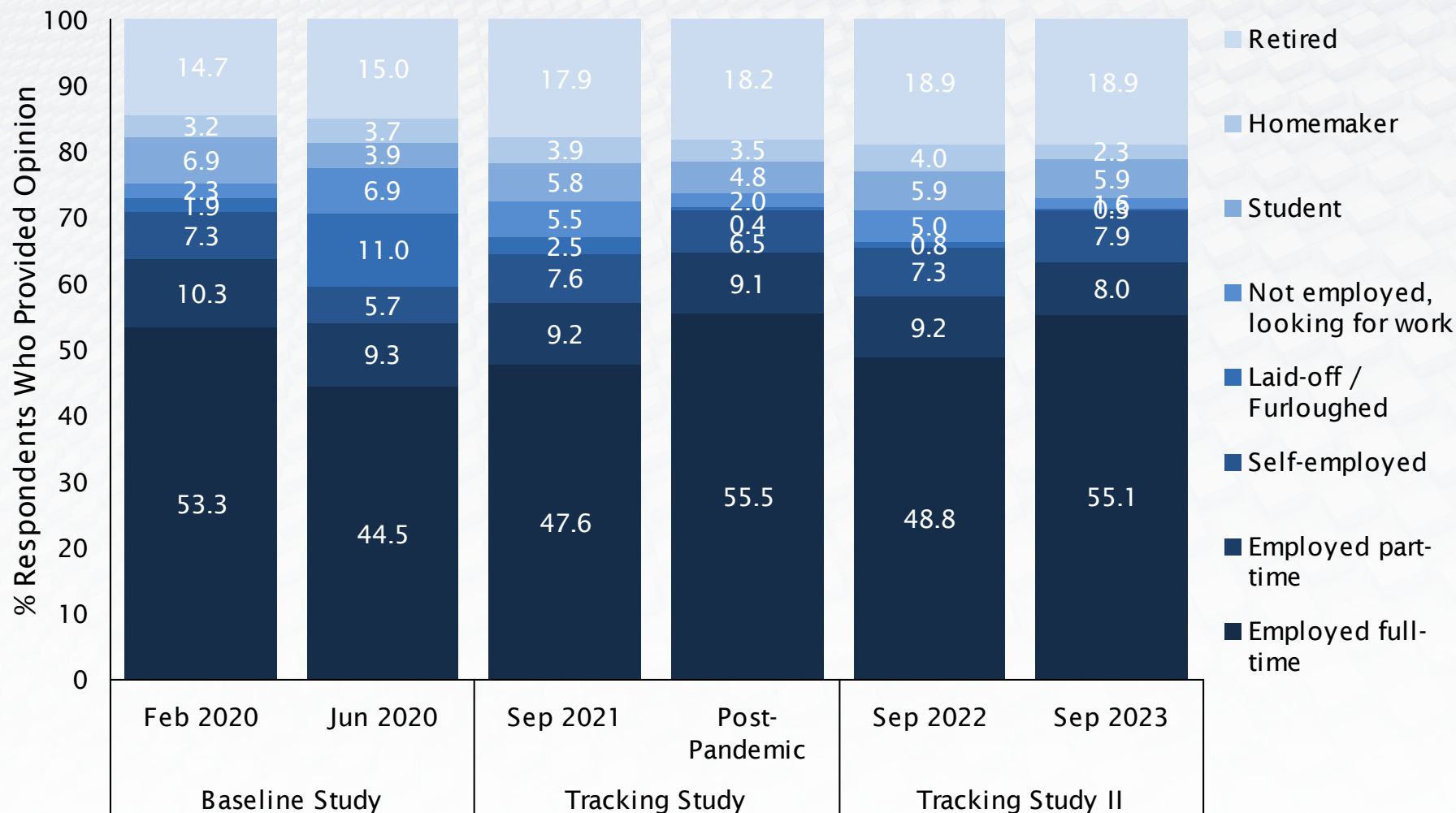
Methodology of Study

- Conducted September 12 to September 30, 2022
- Mixed-Methodology Survey
 - Stratified random sample of Orange County households
 - Multiple recruiting methods (email, text, and telephone) and data collection options (telephone and online)
 - Completed 2,019 interviews
 - English, Spanish, and Vietnamese
- Overall margin of error: $\pm 2.2\%$

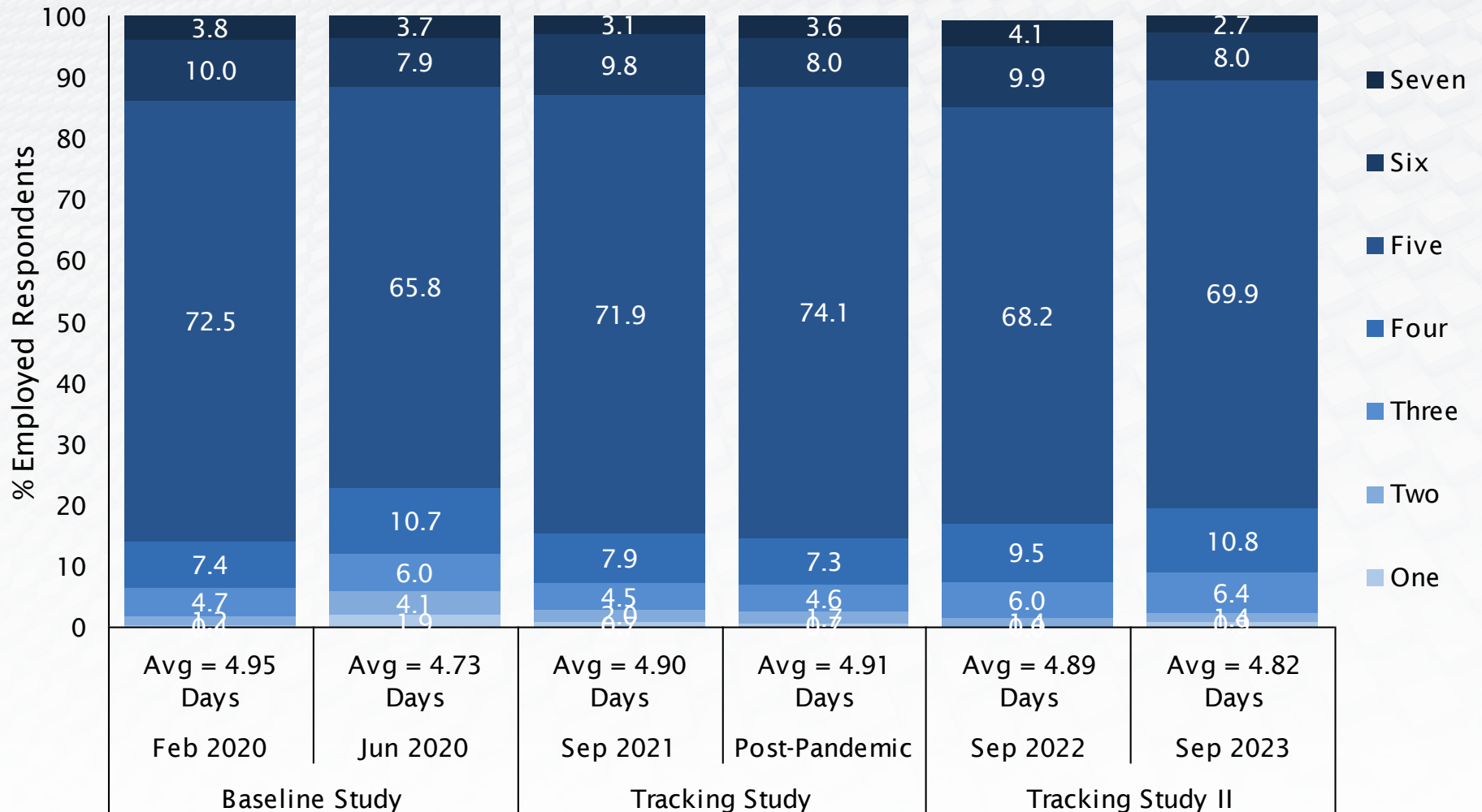
Opinion of COVID-19 by Study Year



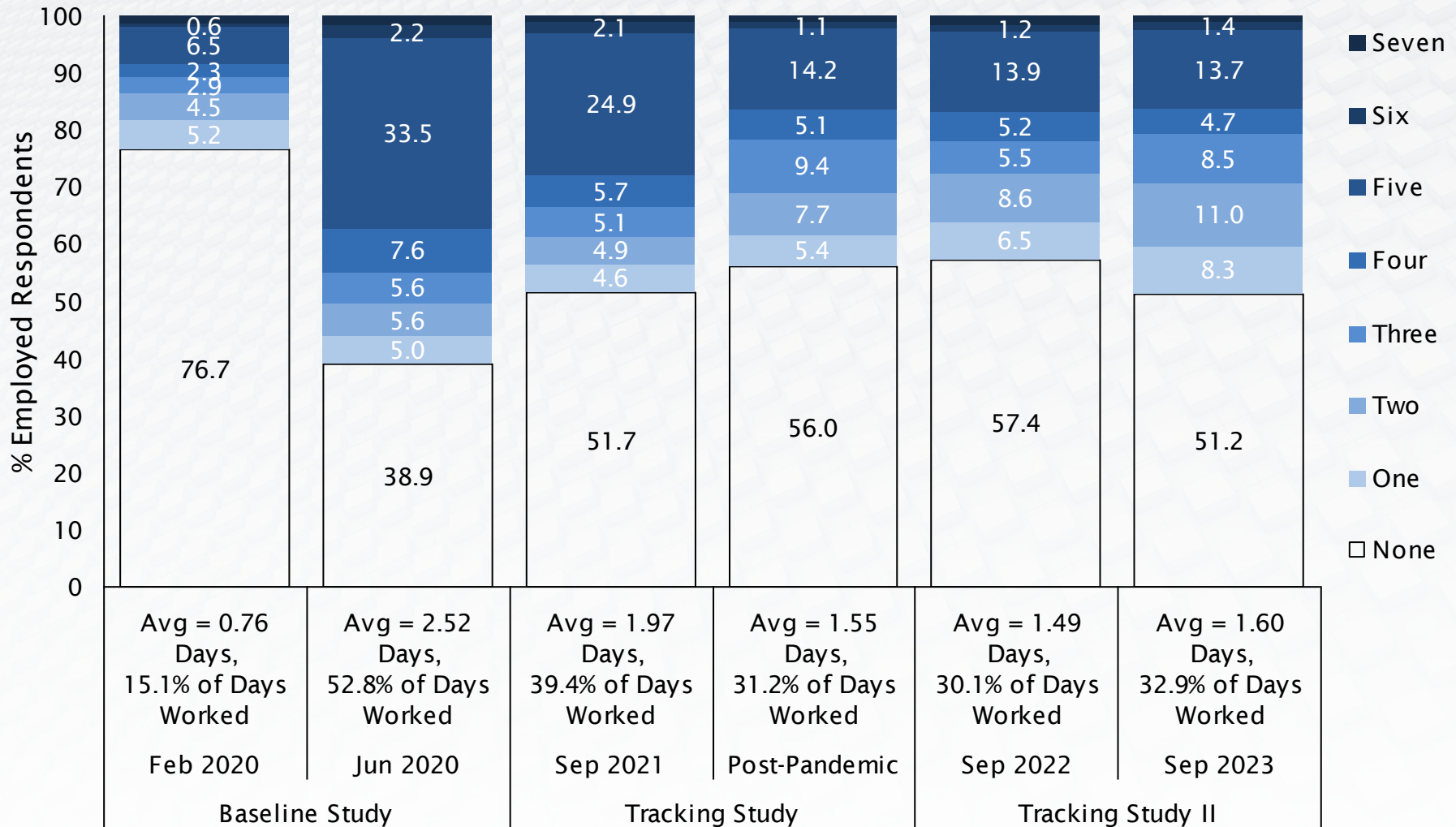
Employment Status



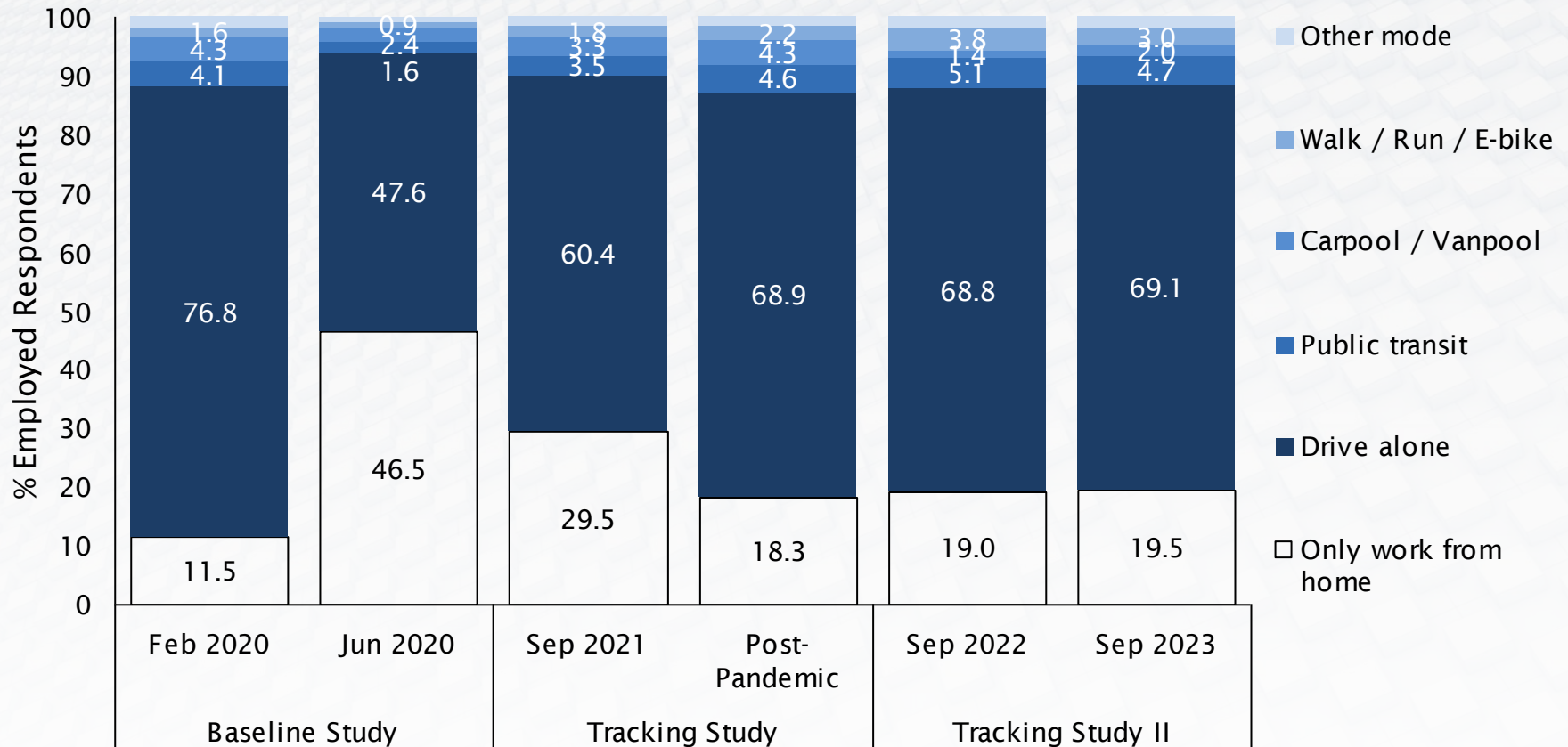
Workdays Per Week



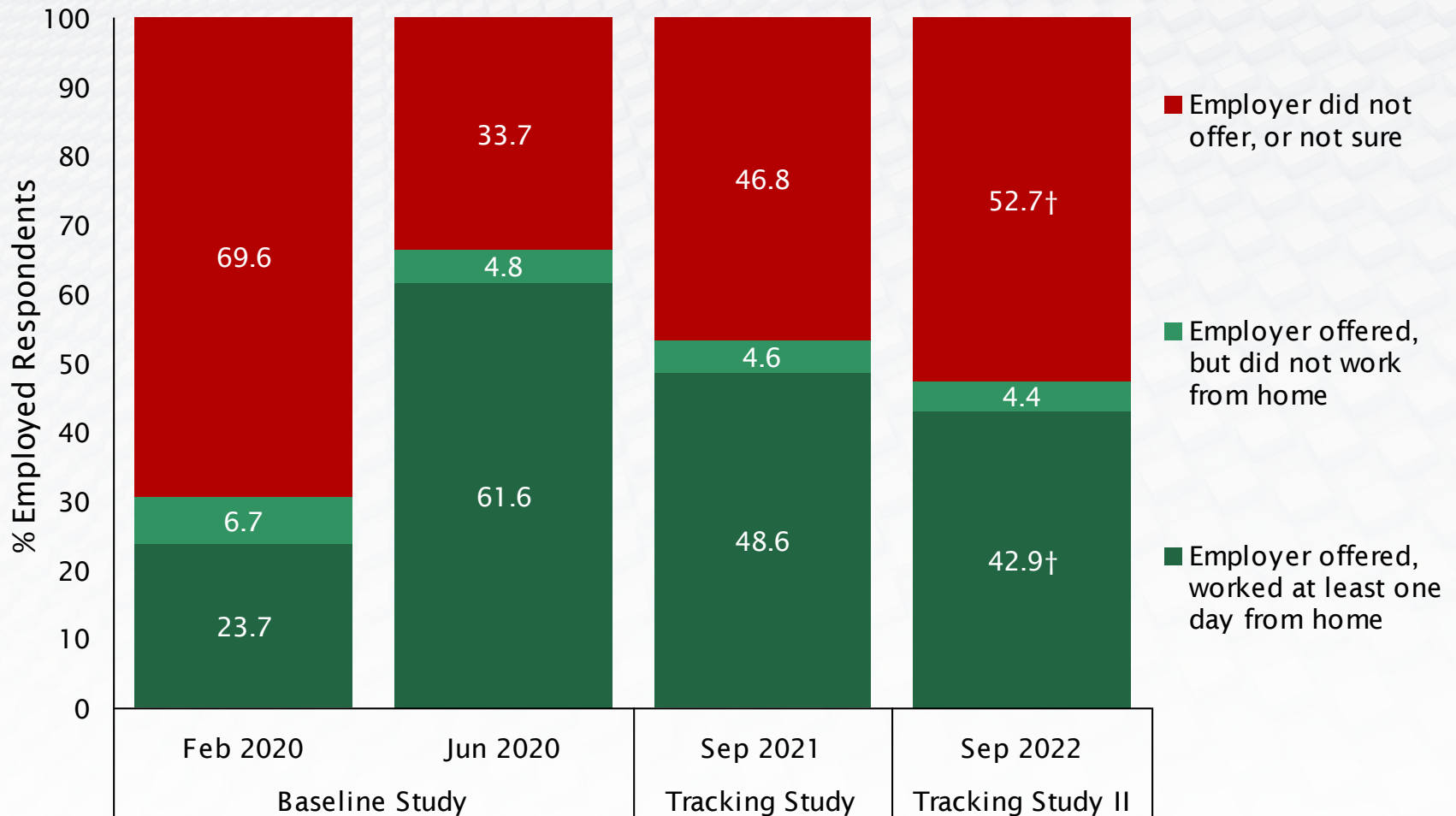
Telework Days Per Week



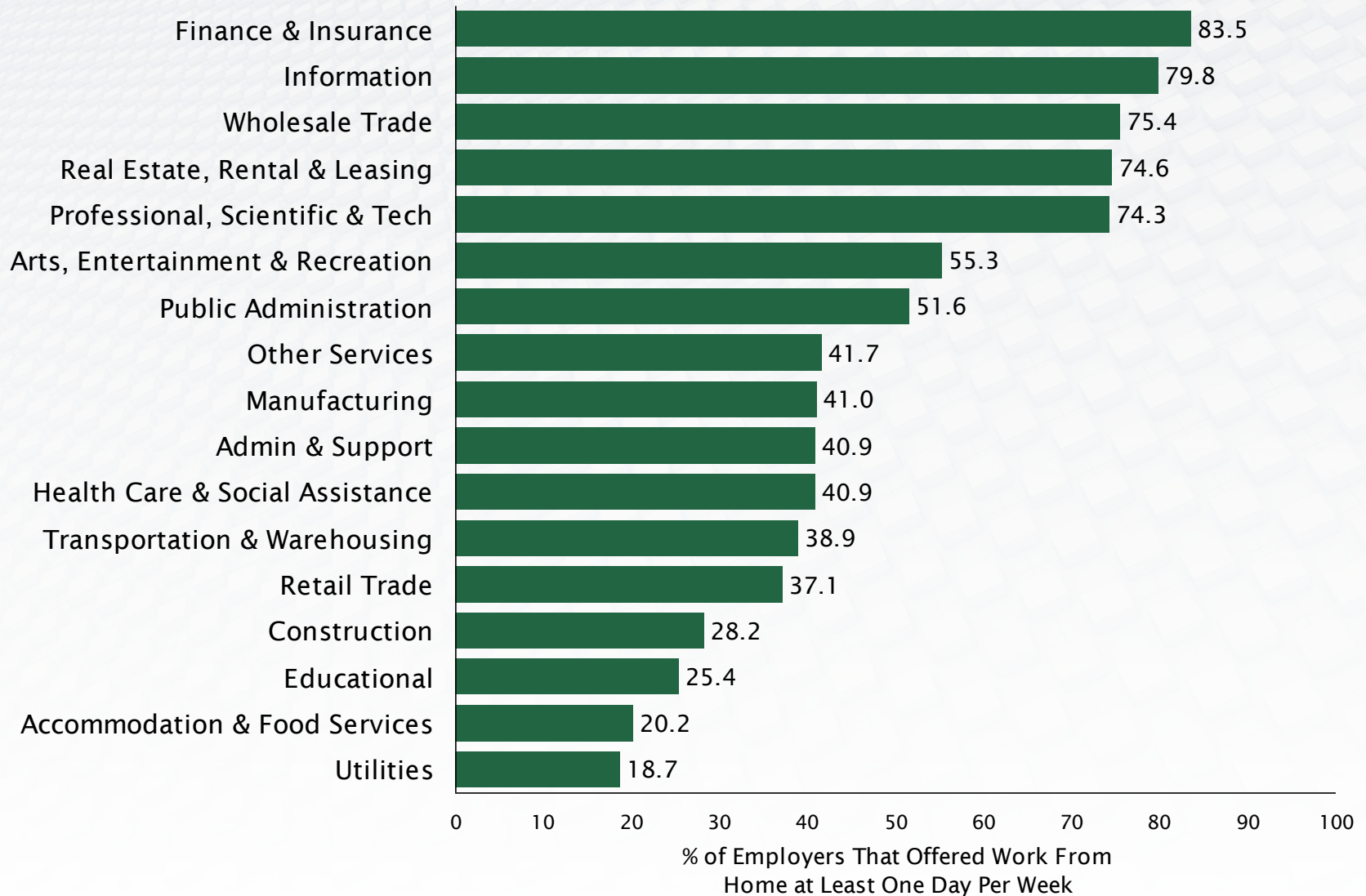
Work Commute Mode



Telework Option



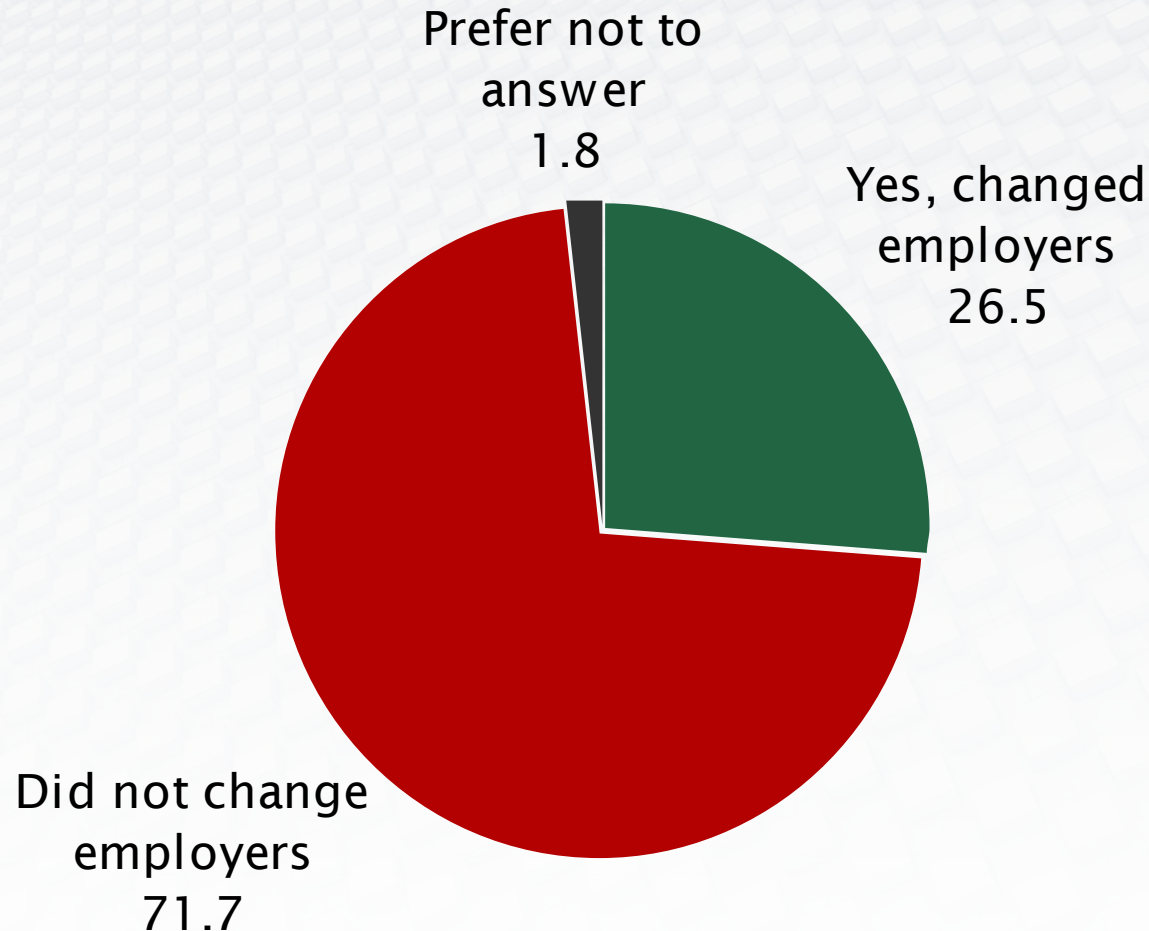
Telework Option by Industry



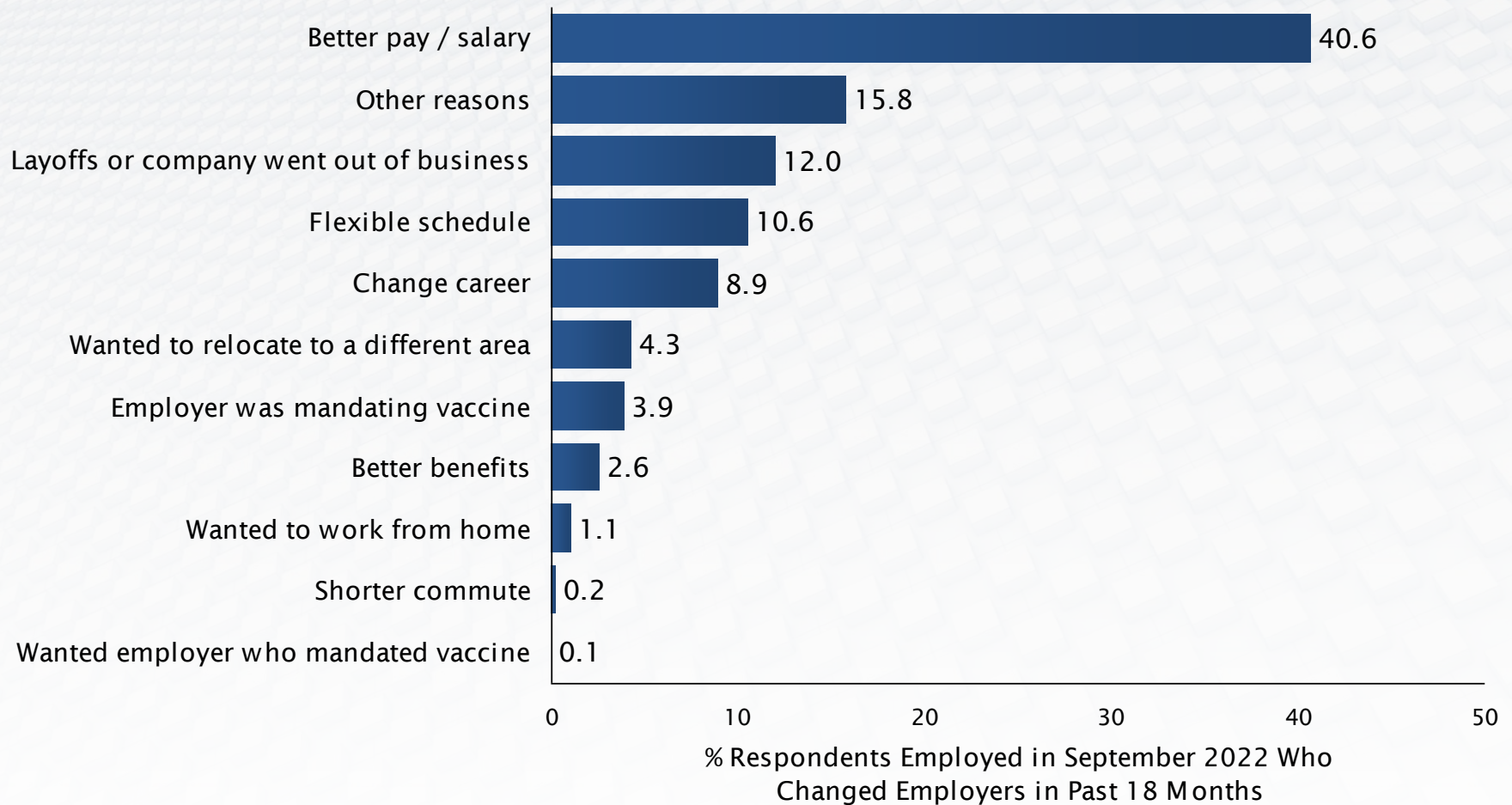
Impact of Working From Home



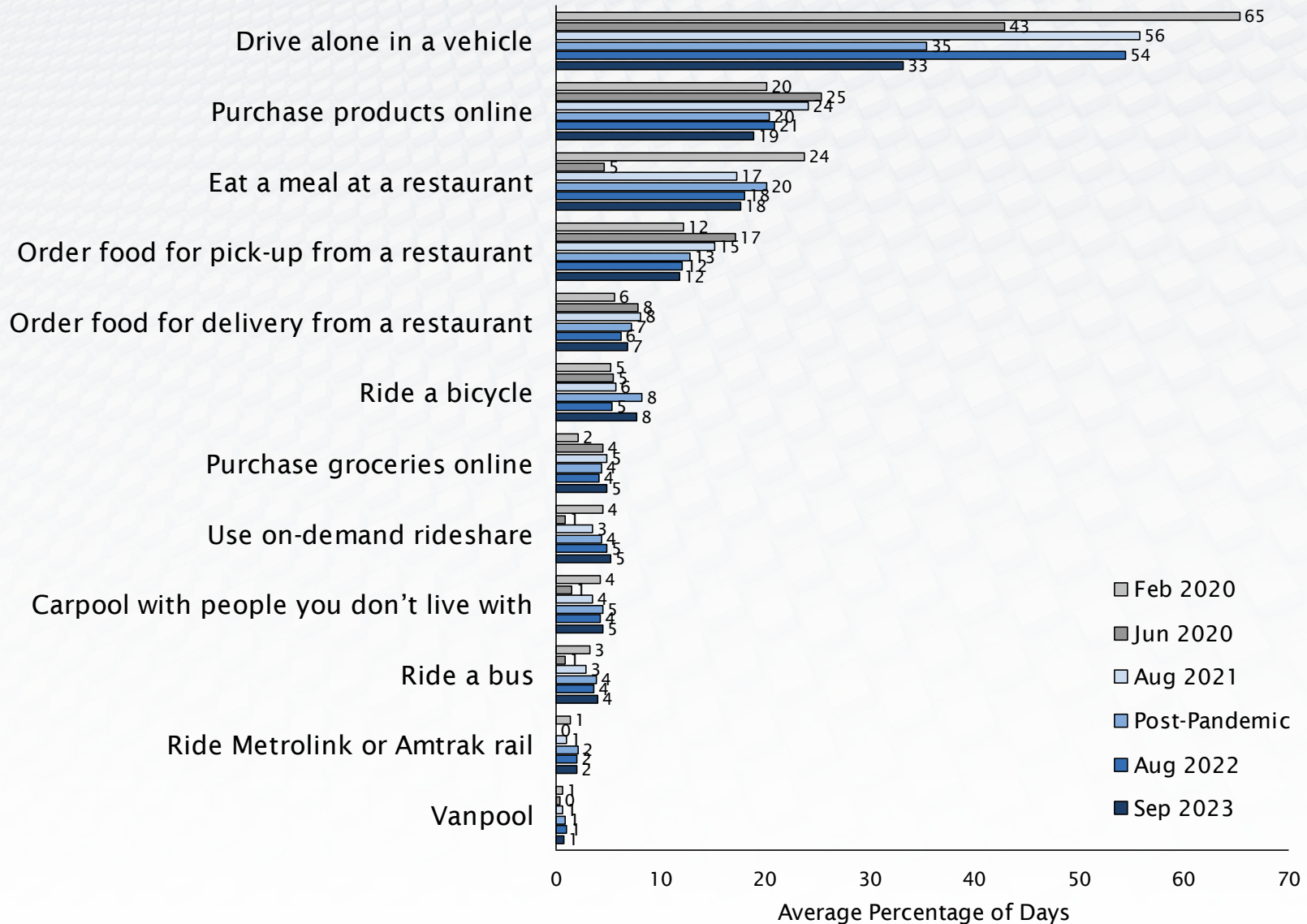
Change Employers in Past 18 Months



Main Reason for Changing Employers



Percentage of Days Per Month Performing Activities



Key Takeaways

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

Key Takeaways (continued)

- **Orange County appears to have reached a new normal for remote work, double pre-pandemic levels.**
 - The percentage working from home one or more days per week settled in at 43 percent by September 2022 (23 percent in February 2022).
 - The average number of days working from home in September 2022 (1.49) is double pre-pandemic levels (0.76).
 - Remote work is not evenly distributed by industry or occupation. White-collar professionals are far more likely than their blue-collar counterparts to have the option to work from home and do so.
 - On most dimensions, employees find remote work to be beneficial to their work experiences and their work-life balance, even more so in 2022 than when asked in 2021. The main exceptions are their ability to communicate and collaborate with other employees.

Key Takeaways (continued)

- **Travel and activity patterns stabilized between August 2021 and August 2022, with exception of commute driving**
 - With the decline in remote work, the percentage of employees driving alone to work increased from 60 percent in September 2021 to 69 percent in September 2022.
 - This trend matches what employees in 2021 forecast for the post-pandemic period, and expectations are that 69 percent will continue to drive solo for their commute in 2023.
 - Use of alternative modes (for commute or general travel), shopping, and dining activities stabilized between August 2021 and August 2022, with little change forecast for 2023.
 - One notable exception is driving alone in a vehicle (general travel), which respondents continue to expect to do less in the future, but so far that expectation has not materialized.