Remote Work Policies & Practices

Tracking Surveys of Businesses and Employees in the San Diego Region

Summary Report Prepared for

SANDAG

June 2023

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INTRODUCTION

The arrival of the novel coronavirus (SARS-CoV-2) 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 within several months,[1] to operate safely during the pandemic many businesses were compelled to shift to a remote work model, with employees working from home, rather than commuting to a central work site. One year into the pandemic (March 2021), the number of employees in the San Diego region who worked from home at least one day per week jumped from 25% (pre-pandemic) to 54%, and the average number of days worked from home among *all* employees increased from 0.8 to 2.2 per week. The pandemic also prompted dramatic changes in travel behavior, with employees reporting significant reductions in the number of days they drove alone, carpooled, or used public transit.[2]

Although the widespread availability of COVID-19 vaccines in 2021 and relaxation of public health guidelines in 2022 allowed most workers the *option* to return to the office, many preferred to keep their remote work status. Anecdotally, there are signs that the remote work tide has ebbed somewhat, but questions remain as to exactly what percentage of workers have returned to the office, how they are commuting, how businesses have adapted to remote work arrangements, and how all of these patterns may vary by industry and/or occupational categories. Equally important is the question of whether businesses and employees anticipate that remote work arrangements will continue to evolve in 2024 or if the patterns found today are effectively the new normal in San Diego County. The answers to these questions are highly relevant to SANDAG's mission to plan and build an integrated, balanced, and equitable transportation system that supports the diverse travel needs of the region.

MOTIVATION FOR RESEARCH The primary purpose of the surveys described in this report was to develop a statistically reliable understanding of how the pandemic has altered remote work practices, policies, and experiences of San Diego businesses and employees, respectively, as well as their expectations for the future. This tracking study represents the *second* in the study series. In March 2021, the baseline **Business Survey** explored how businesses responded to the pandemic with respect to their remote work policies and practices, the perceived impacts of remote work on various aspects of their business, as well as their expectations for the post-pandemic period and beyond. The baseline **Employee Survey** conducted at the same time assessed the impacts of the pandemic on work arrangements from employees' perspectives, focusing in particular on the degree to which employees shifted to working from home, the perceived pros/cons of the arrangement, and whether they expected and/or preferred to continue working from home once the pandemic subsided. The latter survey

1. The remainder of 2020 witnessed fluctuating case loads, hospitalizations, and corresponding public health orders to curb the spread of COVID-19, including requirements for social distancing, restrictions on private and public gatherings, limitations on activities and travel, and industry-specific regulations for businesses from state, county, and local governments.
2. Source: *Remote Work Policies & Practices: Surveys of Businesses and Employees in the San Diego Region.* Report prepared for SANDAG by True North Research, April 2021.

also profiled the changes employees had made to their living arrangements in response to working from home, the types of trips they were making, and how remote work appeared to shape trip generation.

Approximately two years after the baseline surveys were conducted, SANDAG commissioned tracking surveys to be completed in April and May 2023 to gather updated remote work data from businesses and employees for the current period, while also capturing additional details on midday trips and travel behavior among those working from home. For continuity and comparison, the results from the baseline and tracking surveys are shared in this report.

OVERVIEW OF METHODOLOGY A full description of the methodology used for tracking study is included later in this report (see *Methodology* on page 184). For the Business Survey, a total of 627 businesses in the San Diego region participated in the survey between April 24, and May 24, 2023. Businesses were selected at random using a stratified design that considered business size, location, and industry and the final sample was representative on these dimensions both regionally and within subgeographies. Participants in the Employee Survey were initially sampled at random from a geographically-stratified sample of households in San Diego County, then screened to confirm they were currently employed. A total of 1,100 employees completed the survey between April 12, and April 24, 2023, and the final sample was weighted to match employee distribution by age, industry, and subregion. Both tracking surveys followed a mixed-method design that employed multiple recruiting methods (email, text, and telephone) and multiple data collection methods (telephone and online). The Business Survey was administered in English, while the Employee Survey was administered in English and Spanish. Telephone interviews for both surveys averaged 15 minutes in length.

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 survey and a discussion of their implications. For the interested reader, this section is followed by a more detailed question-by-question discussion of the survey results, with the Business Survey results presented first, followed the Employee Survey (see *Table of Contents*). Using a convention that is followed throughout the body of the report, the results are organized according to the reference period (pre-pandemic, during pandemic, post-pandemic expectations, post-pandemic) and draw upon baseline and/or tracking survey data, as appropriate. This allows for a more detailed and complete picture of how employment arrangements, travel behavior, and activities have changed over the past three years. And for the truly ambitious reader, a detailed description of the study methodology appears near the back of the report (see *Methodology* on page 184), as do the questionnaires used for the respective tracking surveys (see *Questionnaires* on page 190).

ACKNOWLEDGMENTS True North thanks SANDAG for the opportunity to assist the agency with this important study, as well as for the thoughtful contributions of staff during the design and reporting stages. The collective expertise, local knowledge, and insight provided by SANDAG staff 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 SANDAG. Any errors and omissions are the responsibility of the authors.

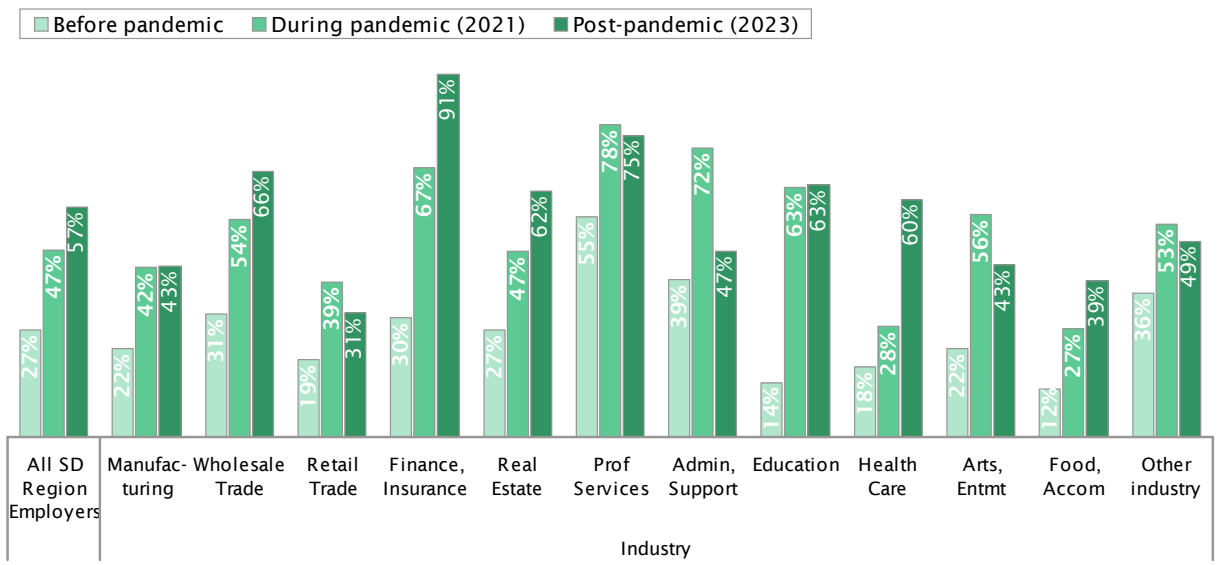
ABOUT TRUE NORTH True North is a full-service survey research firm that is dedicated to providing public agencies with a clear understanding of the values, opinions, priorities and behaviors of their residents and customers. Through designing and implementing scientific surveys, as well as expert interpretation 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 1,200 survey research studies for public agencies, including more than 500 studies for councils of government, transportation planning agencies, municipalities, and special districts.

KEY FINDINGS

This study was designed to provide SANDAG with a statistically reliable understanding of how the pandemic has altered remote work policies and practices in the San Diego region, the perceived impacts of remote work from businesses' and employees' perspectives, as well as their expectations regarding remote work arrangements in the near future. Whereas subsequent sections of this report are devoted to conveying the detailed results of the surveys, in this section we attempt to 'see the forest through the trees' and note how the collective results of the surveys answer some of the key questions that motivated the research.

To what extent did the pandemic shift remote work policies and practices? The pandemic compelled many businesses in the San Diego region to shift to a remote work model, at least for certain employees. Whereas approximately one-quarter of businesses (27%) offered some employees the option to work from home prior to the pandemic, nearly half of businesses (47%) surveyed during the pandemic in 2021 indicated that they provided this option to employees. Although the threat of COVID-19 has subsided and public health restrictions lifted, the practice of offering some employees the option to work from home at least one day per week remains widespread in the post-pandemic environment. When surveyed in 2023, 57% of businesses in San Diego County indicated that they offer one or more employees the option to work from home at least one day per week (see Figure 1).

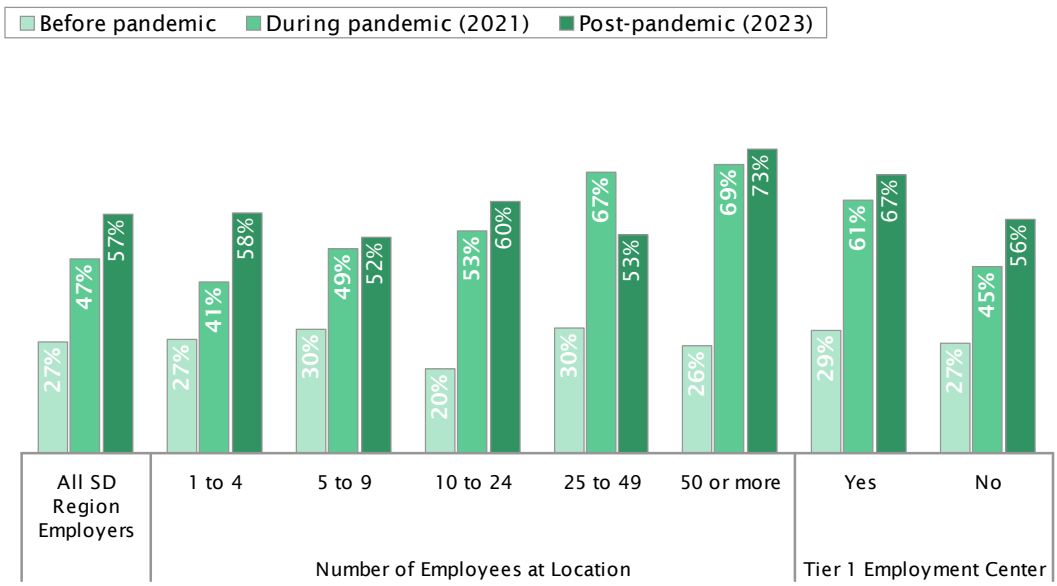
FIGURE 1 BUSINESS SURVEY: PERCENTAGE OF BUSINESSES THAT OFFERED A REMOTE WORK OPTION TO SOME EMPLOYEES, OVERALL AND BY INDUSTRY



Although the percentage of businesses that allowed employees to work from home increased in all industries, company size categories, and locations in the San Diego region during the pandemic, the *magnitude* of the shift varied, as has the resiliency of remote work arrangements in the post-pandemic environment (see Figures 1 & 2). Indeed, whereas certain types of businesses were reluctant or unable to shift to a remote work model and posted only modest increases during the pandemic, the percentage of businesses allowing employees to work from home doubled, tripled, or even quadrupled in other industries or size categories by 2021. When compared to their pre-pandemic patterns, businesses in the education, arts and entertainment,

and finance and insurance industries, those with 25 to 249 employees at their location, and businesses located in one of the region's Tier 1 Employment Centers[3] made the largest shifts in their remote work offerings during the first year of the pandemic. When compared to pandemic-era patterns, most business subgroups have sustained or even expanded their remote work offerings in the post-pandemic environment, with notable exceptions in the retail trade, administrative and support services, and arts and entertainment industries.

FIGURE 2 BUSINESS SURVEY: PERCENTAGE OF BUSINESSES THAT OFFERED A REMOTE WORK OPTION TO SOME EMPLOYEES, OVERALL AND BY NUMBER OF EMPLOYEES AT LOCATION AND TIER 1 EMPLOYMENT CENTER



In addition to more businesses allowing employees to work from home, businesses also had the opportunity to expand their remote work offer to a larger percentage of their workforce during the pandemic. The results of this study indicate that this type of change accounted for just a small percentage of the net increase in remote work opportunities in the region during the pandemic. Among businesses that offered a remote work option prior to the pandemic, the average percentage of their workforce that had the *option* to work from home at least one day per week was 64% (see Figure 3). While the percentage of businesses offering employees the option to work from home nearly doubled during the pandemic (see Figures 1 & 2), the proportion of their employees with the option to work from home remained fairly stable at 68%. In the post-pandemic environment (2023), the figure increased slightly to 72%.

Here again, however, the study found starkly different patterns in select industries and by company size (see Figures 3 & 4). Certain sectors extended the remote work option to a larger percentage of their workforce during the pandemic, while others kept the percentage stable or even decreased the percentage of their workforce allowed to work from home.[4] For most business subgroups, the percentage of their workforce allowed to work from home at least one day per week post-pandemic is reasonably similar to the percentage that had the opportunity during the pandemic in 2021. That said, it is noteworthy that when viewed by size of business

3. Tier 1 Employment Centers are areas with high densities of employment (at least 75,000 employees). There are three Tier 1 Employment Centers in the region (Downtown San Diego, Sorrento Valley, and Kearny Mesa).

(number of employees at the location), small businesses (less than five employees) were the only group that reported an increase in the percentage of their workforce with a remote work option during the post-pandemic period. Larger businesses generally reported a reduction in the proportion of their workforce that can work remotely when compared to 2021.

FIGURE 3 BUSINESS SURVEY: AMONG BUSINESSES THAT OFFER REMOTE WORK, AVERAGE PERCENTAGE OF WORKFORCE OFFERED REMOTE WORK OPTION, OVERALL AND BY INDUSTRY

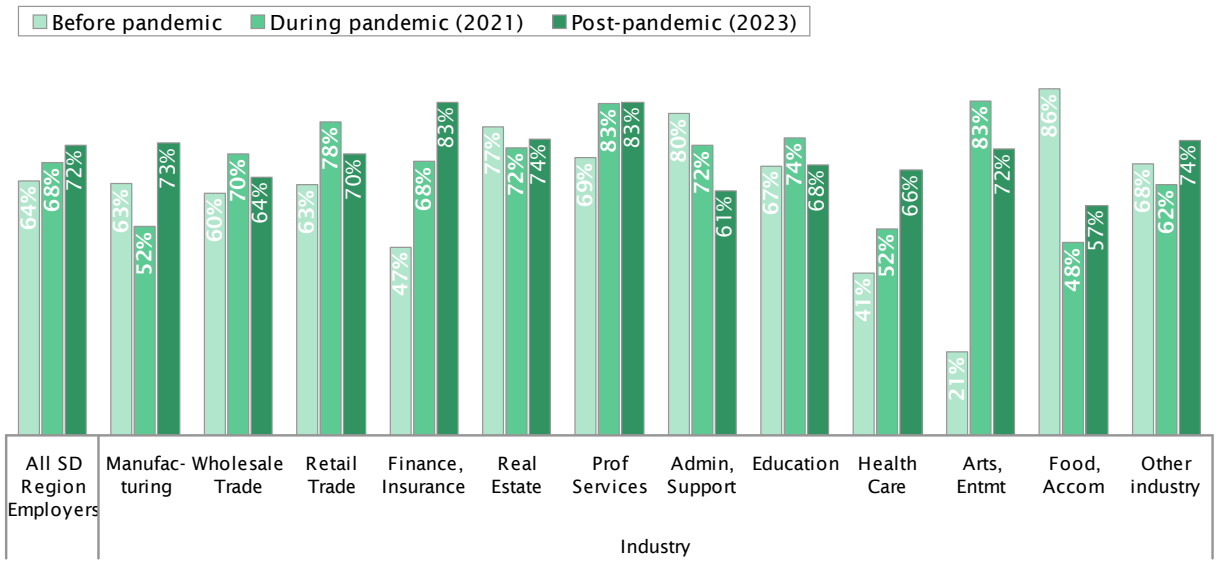
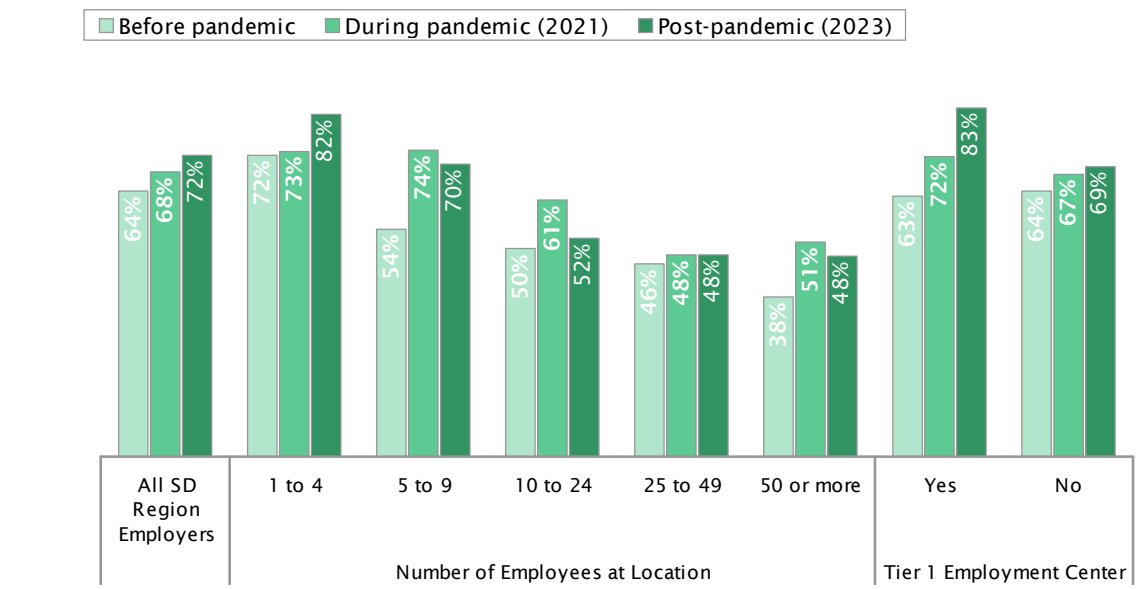


FIGURE 4 BUSINESS SURVEY: AMONG BUSINESSES THAT OFFER REMOTE WORK, AVERAGE PERCENTAGE OF WORKFORCE OFFERED REMOTE WORK OPTION, OVERALL AND BY NUMBER OF EMPLOYEES AT LOCATION AND TIER 1 EMPLOYMENT CENTER

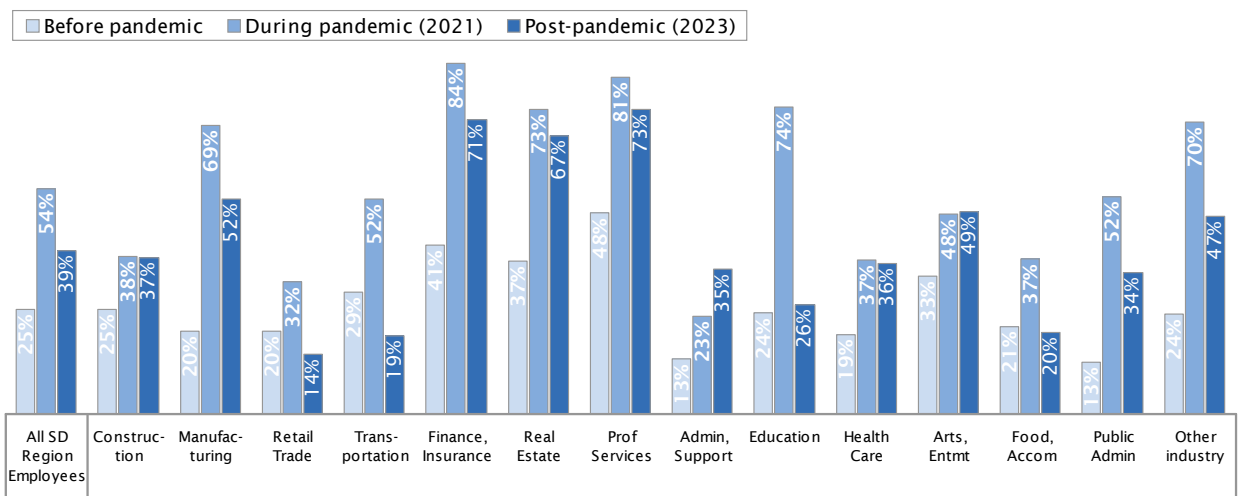


4. Although a decrease in the percentage of employees offered remote work during the pandemic seems counterintuitive at first glance, it is important to keep in mind that the pool of companies offering a remote work option increased during the pandemic, dramatically so in some industries. As these companies began introducing a remote work option to their employees, if the proportion of their workforce given the option to work from home was significantly lower than among the smaller number of companies offering it pre-pandemic, it will lower the overall average.

The dramatic shift in remote work policies in response to the pandemic was accompanied by a similarly large shift in *where* employees performed their work. Prior to the pandemic, one-quarter (25%) of employees who reside in the San Diego region indicated that they worked from home at least one day per week (see Figure 5). One year into the pandemic, more than half (54%) were operating according to a remote work model one or more days per week.[5] The increase in employees working from home during the pandemic was concentrated within certain industries and employee subgroups, being most pronounced among those working in education, manufacturing, public administration, and other industries, high-income earners/households, individuals who weren't independent contractors, and those who preferred to take the survey in English (see Figures 5 & 6).

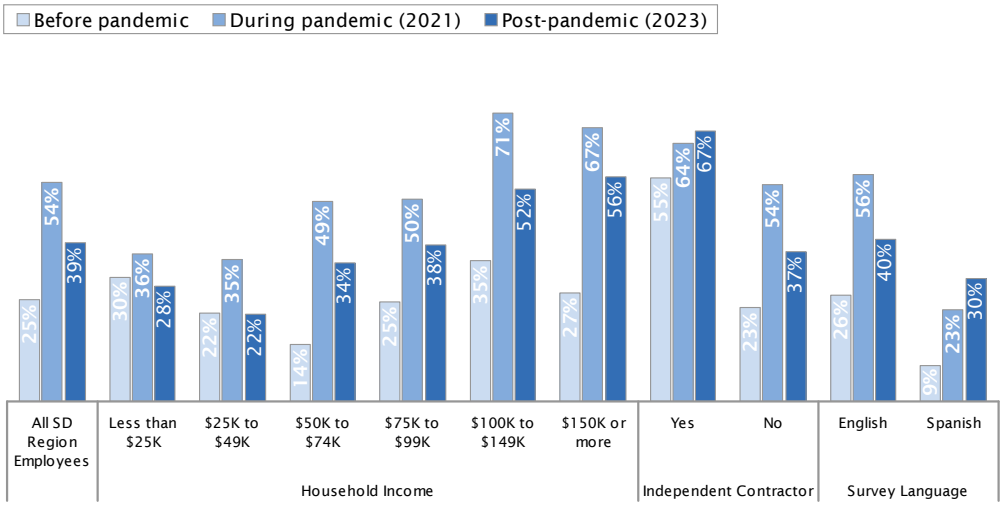
Although businesses generally reported continuing or even expanding their pandemic-era policies with respect to remote work in the post-pandemic period (see above), fewer employees (39%) reported that they work from home at least one day per week in 2023 when compared to 2021 (54%).[6] When compared to their respective counterparts, the decline was most pronounced among those working in the education and transportation industries, employees in households earning between $100,000 and $149,999 annually, those not working as an independent contractor, and individuals who completed the survey in English.

FIGURE 5 EMPLOYEE SURVEY: PERCENTAGE OF EMPLOYEES REMOTE WORKING 1+ DAYS PER WEEK, OVERALL AND BY INDUSTRY



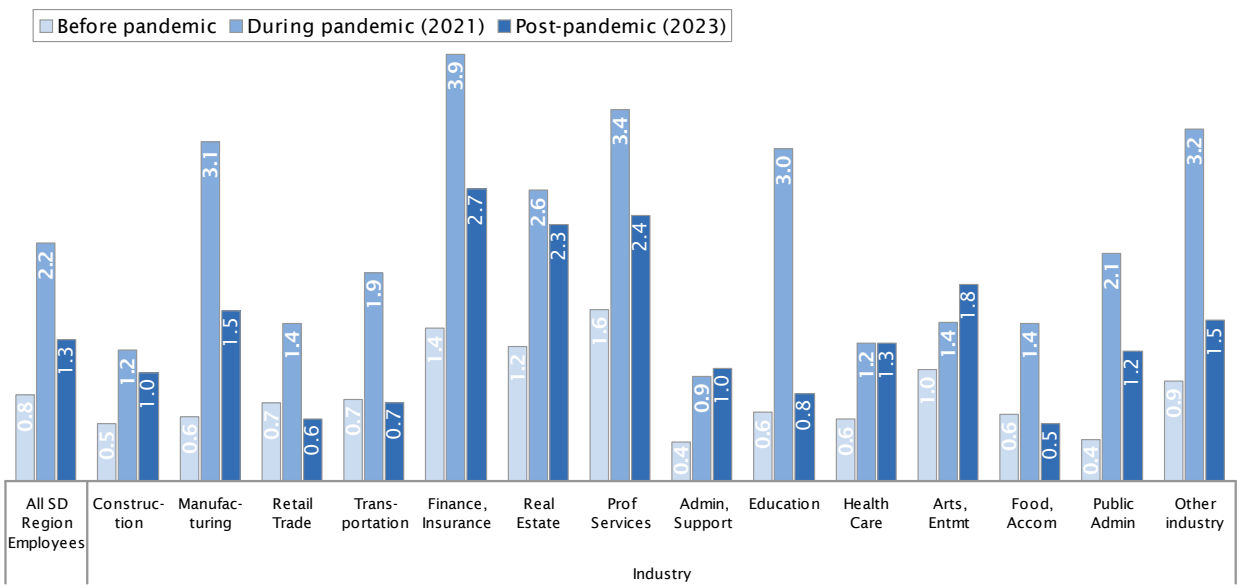
5. Respondents who were unemployed pre-pandemic or anticipated being so after the pandemic were removed from these figures to improve the comparability of remote work proportions across all three periods. The figures in the main body of the report include unemployed individuals when presenting the breakdowns.
6. It is important to keep in mind that the Business Survey treats businesses the same regardless of size. The data from a small business (less than five employees) contributes the same weight to the overall outcome as the data from a business with 250 or more employees. In this way, the expansion of remote work policies among small businesses and the growth in the percentage of their employees working remotely post-pandemic leads to an overall increase in regional figures for 2023, despite declines reported by larger businesses in the percentage of employees offered a remote work option and those working remotely. The Employee Survey data, meanwhile, is more heavily influenced by the policies and practices of larger businesses as these businesses account for a large percentage of the workforce in the region. This, combined with a shift more toward hybrid work arrangements, helps explain why the remote work tide appears stable between 2021 and 2023 when considering the number of businesses that offer remote work and the percentage of their workforces that work from home at least one day per week, but has clearly ebbed when one examines the percentage of employees working remotely and the number of days they do so now (post-pandemic) when compared to 2021.

FIGURE 6 EMPLOYEE SURVEY: PERCENTAGE OF EMPLOYEES REMOTE WORKING 1+ DAYS PER WEEK, OVERALL AND BY HOUSEHOLD INCOME, INDEPENDENT CONTRACTOR STATUS, AND SURVEY LANGUAGE



Factoring in the actual number of days worked at home presents a similarly bold picture of the changes in employee work arrangements prompted by the pandemic, as well as how the remote work tide has receded somewhat in the post-pandemic period (see Figures 6 & 7). Prior to the pandemic, the *average* employee in the San Diego region worked from home 0.8 days per week.[7] One year into the pandemic, that figure had nearly tripled to 2.2 days per week. By 2023, the average employee in the region reported working from home 1.3 days per week.

FIGURE 7 EMPLOYEE SURVEY: AVERAGE DAYS PER WEEK REMOTE WORKING PRIMARILY, OVERALL AND BY INDUSTRY

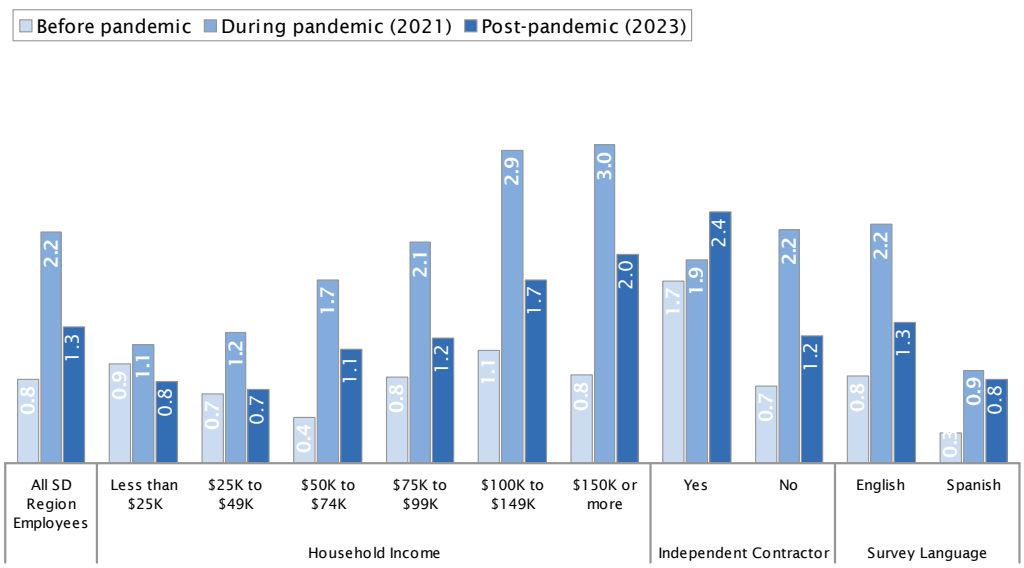


7. This average factors in all employees, including those who did not work from home.

Like the Business Survey, the Employee Survey revealed that the shift to a remote work model in response to the pandemic was quite uneven across industries and subgroups. While employees in certain industries (manufacturing, finance and insurance, real estate, professional services, education, and other industries) were working the majority of their days at home during the pandemic, those in other industries (construction, retail trade, administrative and support services, health care, arts and entertainment, food and accommodations) still performed the majority of their work at a location outside their home. The relationship between household income and remote work was also striking, with the number of days worked at home increasing along with household income. At the extreme ends of the scale, employees from households earning less than $25,000 annually averaged 1.1 days per week working at home during the pandemic, while those living in households earning $150,000 or more worked from home an average of three days per week (see Figure 8).

The stark disparities in remote work patterns by industry, household income, and language that occurred during the pandemic have faded somewhat in the post-pandemic period. Continuing with the above example, whereas the difference in days worked remotely per week was 1.9 between employees in the highest income category ($150,000 or more) and those in the lowest (less than $25,000) during the pandemic, by 2023 that difference had shrunk to 1.2. The only exception to this pattern was found when comparing independent contractors to those who work for an employer. Independent contractors increased the number of days they worked remotely between 2021 and 2023, while employees experienced a large drop in the number of days they worked remotely during this same period.

FIGURE 8 EMPLOYEE SURVEY: AVERAGE DAYS PER WEEK REMOTE WORKING PRIMARILY, OVERALL AND BY HOUSEHOLD INCOME, INDEPENDENT CONTRACTOR STATUS, AND SURVEY LANGUAGE

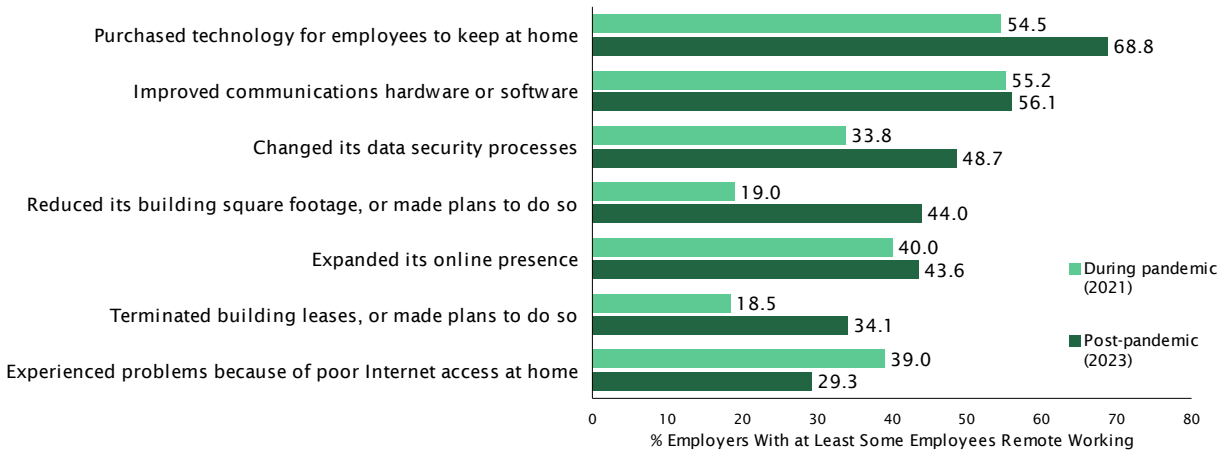


What changes have businesses and employees made to accommodate remote work? The shift to a remote work model required significant investments and adjustments from both businesses and employees. To accommodate more employees working from home, more than half of businesses surveyed in the first year of the pandemic (2021) indicated that they had improved communications hardware or software and purchased technology for employees to

keep at home, while at least one-third of businesses had expanded their online presence and changed their data security processes (see Figure 9). With more employees working from home, one-in-five businesses in the San Diego region also reconsidered their facility needs in 2021, stating that they had reduced their building square footage or had plans to do so, and/or had terminated building leases or had plans to do so. Nearly four-in-ten businesses also reported experiencing problems due to some employees having poor Internet access at their home.

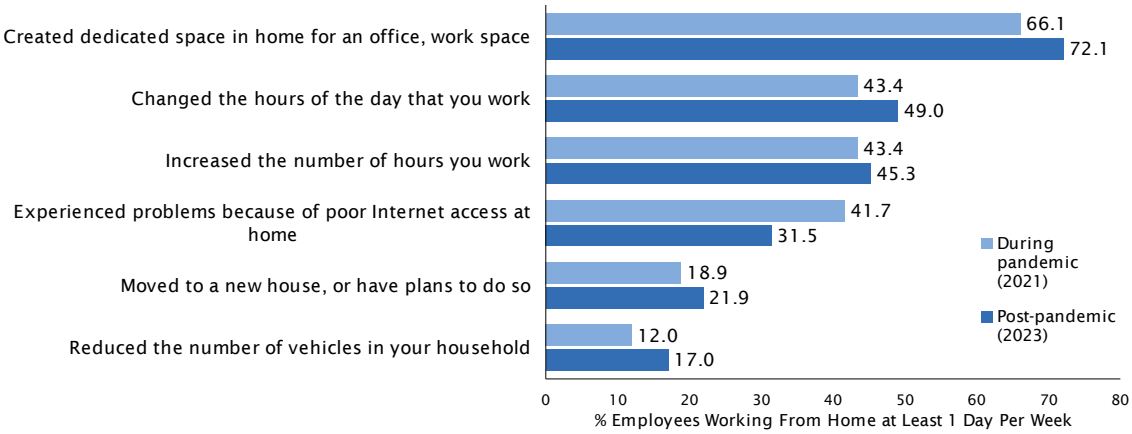
By 2023, businesses that embraced remote work for some employees reported a deeper commitment to this model, with significant increases in the percentage of businesses that had reduced their building square footage (+25%), terminated leases (+16%), changed data security processes (+15%), and purchased technology for employees to keep at home (+14%) when compared to 2021. The percentage of businesses experiencing problems due to poor Internet connections at employees' homes also declined by 10% post-pandemic.

FIGURE 9 BUSINESS SURVEY: BUSINESS CHANGES & CHALLENGES DUE TO EMPLOYEES WORKING FROM HOME



The patterns of adjustment and investment have been similar on the employee side of the ledger. Shifting to a remote work model compelled two-thirds of employees to create dedicated space in their home for an office or work space during the pandemic, while more than four-in-ten employees reported that they changed the hours of the day they work and work more hours per day when working from home (Figure 10). Just as some businesses reconsidered their facility and equipment needs, so too did employees. Approximately one-in-five employees moved to a new house or had plans to do so in response to working more from home, whereas approximately one-in-ten reduced the number of vehicles their household owned during the pandemic. The patterns found during the pandemic in 2021 remained fairly consistent in the post-pandemic environment (2023), although there were small increases in the percentage of employees reporting that they created dedicated work space in their home (+6%), changed the hours of day they work (+6%), and reduced the number of vehicles their household owns (+5%), along with a decrease in the percentage reporting poor Internet access issues when working from home (-10%).

FIGURE 10 EMPLOYEE SURVEY: CHANGES MADE DUE TO WORKING FROM HOME

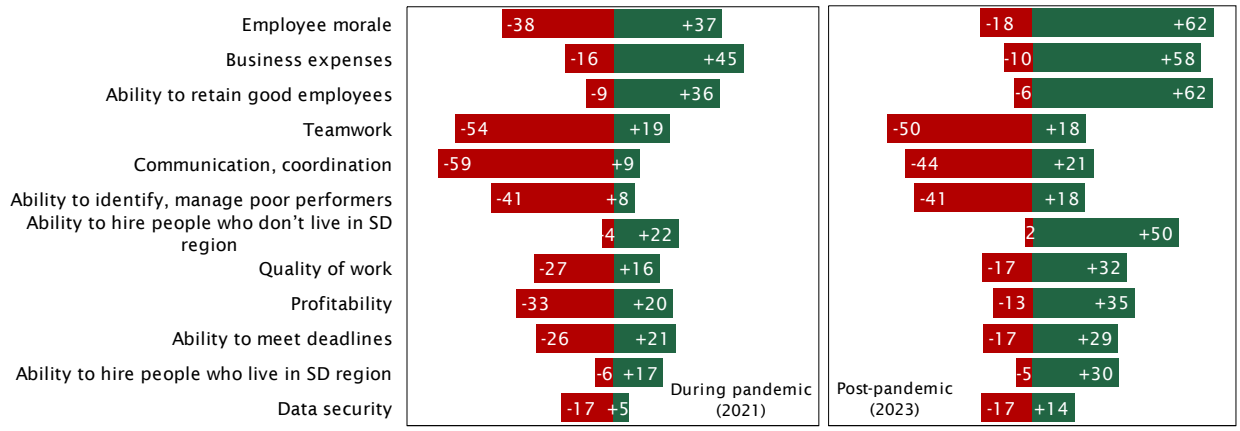


What are the pros and cons of remote work? During the pandemic, the answer to this question depended on who you asked. Businesses spanned the full-spectrum in terms of their perspectives on remote work, with some citing the advantages of remote work to many aspects of their business, others seeing little impact, and still others encountering a range of difficulties. That said, there were certain aspects that nearly all businesses agreed were helped (or at least not hurt) by having employees working from home—most notably their ability to retain good employees, hire people both in and outside of the San Diego region, and manage their business expenses (see left side of Figure 11). For all other dimensions tested, however, more businesses perceived that remote working arrangements were hurtful to their business than helpful. Teamwork, communication/coordination, and the ability to identify and manage poor performing employees were the dimensions with the highest percentage of businesses reporting *hurtful* impacts associated with employees working from home, coupled with far fewer businesses reporting a helpful impact. One-third of businesses stated flatly that they were less productive[8] and less profitable with employees working from home, while just 9% felt more productive and 20% more profitable. During the pandemic, businesses were also evenly divided on the impacts of remote work on employee morale with 38% finding it to be hurtful and 37% helpful.

Fast forward two years to 2023 and its clear that businesses, as a whole, have warmed to the concept and practice of having some employees working from home. As shown on the right side of Figure 11, every dimension tested found the net balance (% helpful - % hurtful) shift between 2021 and 2023 in the direction of remote work being perceived as more helpful to their business than harmful. Although the impact of remote work on three dimensions (teamwork, communication, and ability to manage poor performers) are still viewed by businesses as mostly negative, it is less so in 2023 than during the pandemic.[9]

8. The measure of productivity impacts due to remote work was captured in a separate question in the Business Survey and isn't shown in Figure 11 (see *Impact of Remote Work on Productivity* on page 36).
9. When compared to 2021, businesses also reported more flexibility in 2023 with respect to allowing existing employees to move away from the region and keep their jobs, as well as hiring people from outside the region and allowing them to stay remote (see *Businesses: Impacts of Remote Work* on page 68).

FIGURE 11 BUSINESS SURVEY: PERCENTAGE OF BUSINESSES CITING HURTFUL/HELPFUL IMPACTS OF EMPLOYEES WORKING FROM HOME

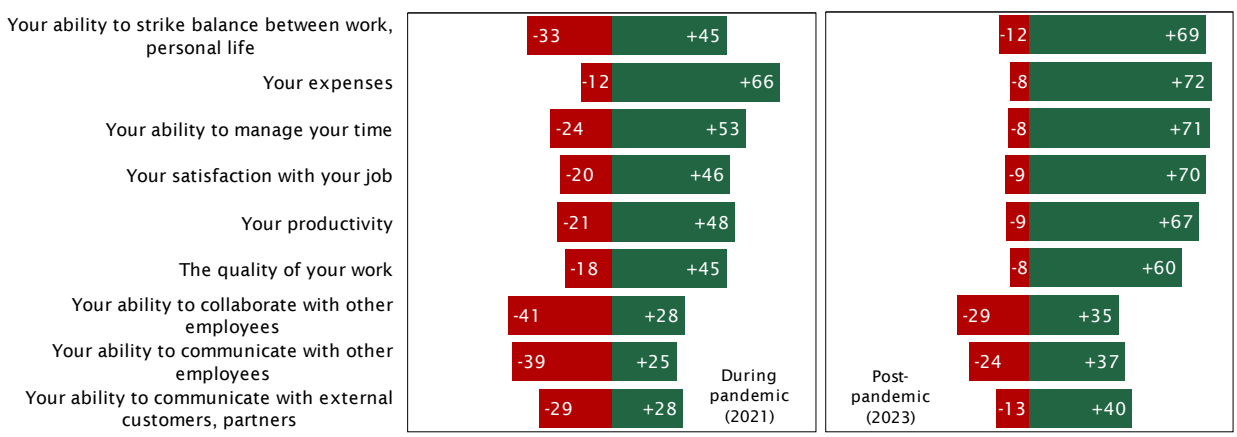


Hurtful/Helpful Impact of Each Aspect, % Employers With at Least Some Employees Remote Working

In contrast to the perspective of businesses during the pandemic (see above), employees were far more apt from the outset to find that remote work helped many aspects of their performance and work environment (see left side of Figure 12). This was especially true for their ability to manage their expenses, manage their time, be productive, produce quality work, and their overall job satisfaction. Where employees and businesses generally saw eye-to-eye during the pandemic were the impacts of working from home on employees' abilities to *communicate* and *collaborate* with other employees and across the organization. Both viewed these as the biggest challenges associated with a remote work model in 2021.

Employees' views of remote work have become even more positive in the post-pandemic period (see right side of Figure 12). For every dimension tested, the percentage of employees who viewed remote work as being helpful increased between 2021 and 2023, while the percentage who found it harmful decreased. By 2023, employees who work from home at least one day per week had even shifted their perspective on the impacts of remote work on their ability to communicate and collaborate with other employees, and communicate with external clients. Each of these dimensions shifted from net negative in 2021 to net positive in 2023.

FIGURE 12 EMPLOYEE SURVEY: NEGATIVE/POSITIVE IMPACTS OF EACH ASPECT



Neg/Pos Impact of Each Aspect, % Employees Working From Home at Least 1 Day Per Week

Are the remote work patterns of 2023 the new normal for the region? To effectively plan for the future, SANDAG has a particular interest in whether remote work patterns will continue to change, or if the patterns found in 2023 have stabilized to a degree that they represent a new equilibrium for the region. Accordingly, businesses and employees were asked to cast their gaze to the future—one year from now—and relay their expectations with respect to their remote work policies and practices.

From the perspective of businesses surveyed in 2023, few changes were expected in their remote work policies and practices during the next year. Whereas 57% currently offer a remote work option to employees, 53% forecast they will do so in 2024 (see Figure 13). The stability of remote work expectations in the aggregate was also found in most business subgroups, although its noteworthy that select industries (education, food and accommodations) and businesses with 50 or more employees anticipated a substantial contraction in remote work offerings during the next year (see Figures 13 & 14). In terms of the percentage of their workforce that will be allowed to work remotely at least one day per week in 2024, businesses in the San Diego region also anticipated little change in the aggregate—from 72% in 2023 to 74% in 2024 (see Figures 15 & 16).

FIGURE 13 BUSINESS SURVEY: PERCENTAGE OF BUSINESSES THAT EXPECT TO OFFER REMOTE WORK OPTION TO SOME EMPLOYEES IN 2024, OVERALL AND BY INDUSTRY

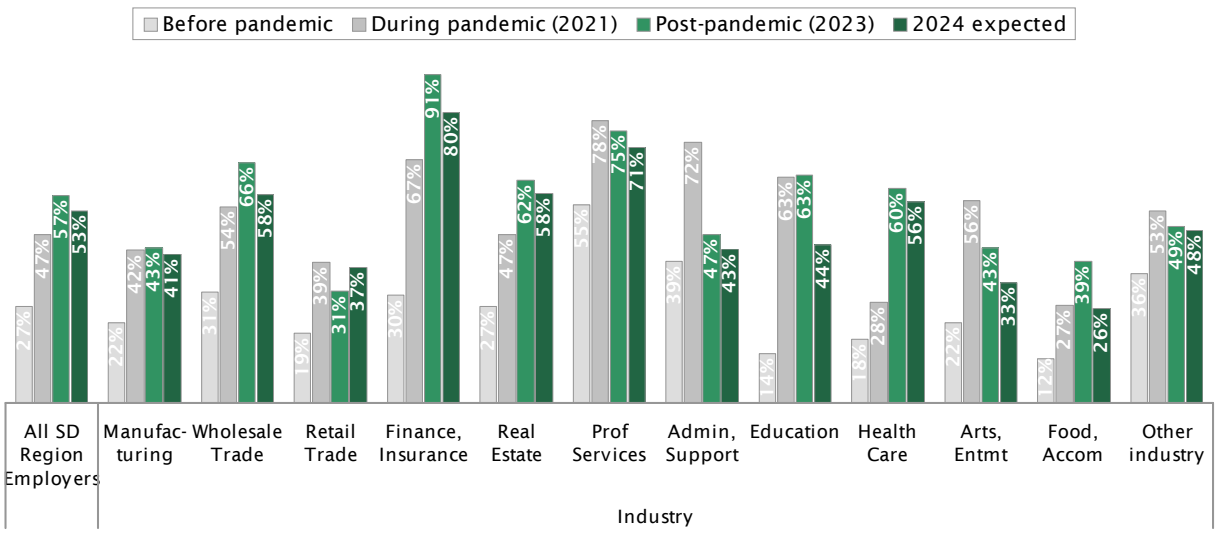


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FIGURE 14 BUSINESS SURVEY: PERCENTAGE OF BUSINESSES THAT EXPECT TO OFFER REMOTE WORK OPTION TO SOME EMPLOYEES IN 2024, OVERALL AND BY NUMBER OF EMPLOYEES AT LOCATION AND TIER 1 EMPLOYMENT CENTER

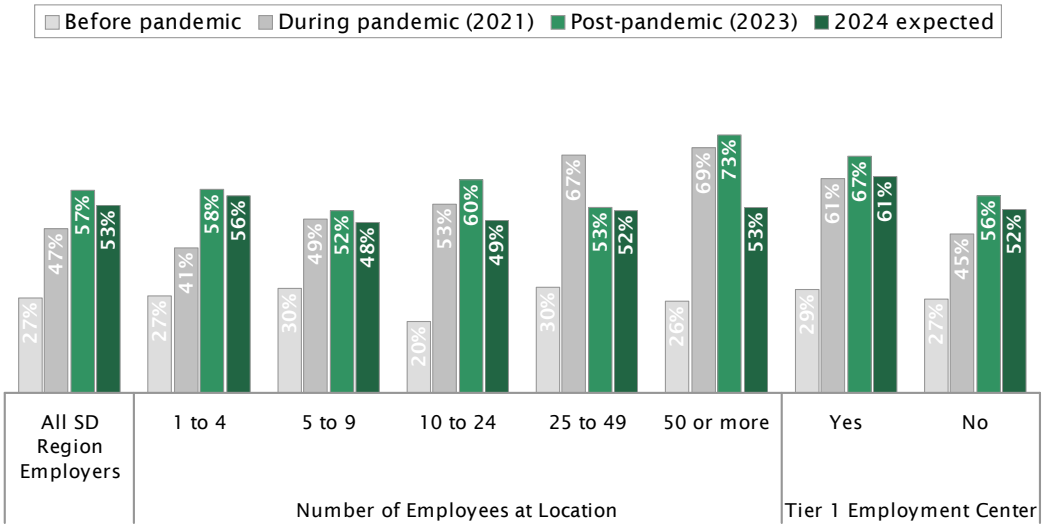


FIGURE 15 BUSINESS SURVEY: AVERAGE PERCENTAGE OF WORKFORCE TO RECEIVE REMOTE WORK OPTION IN 2024, OVERALL AND BY INDUSTRY

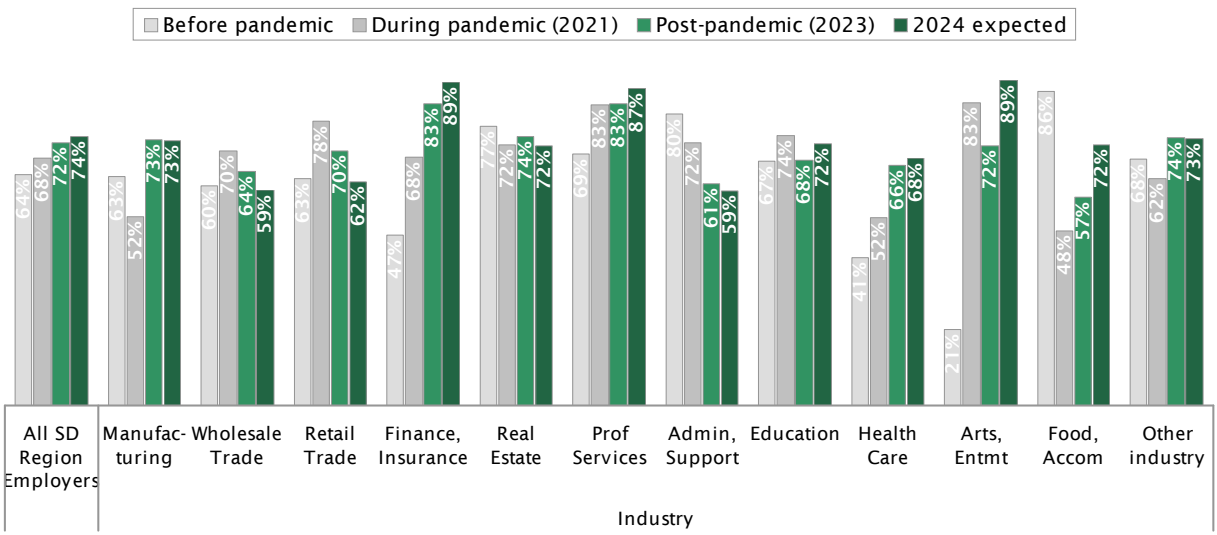
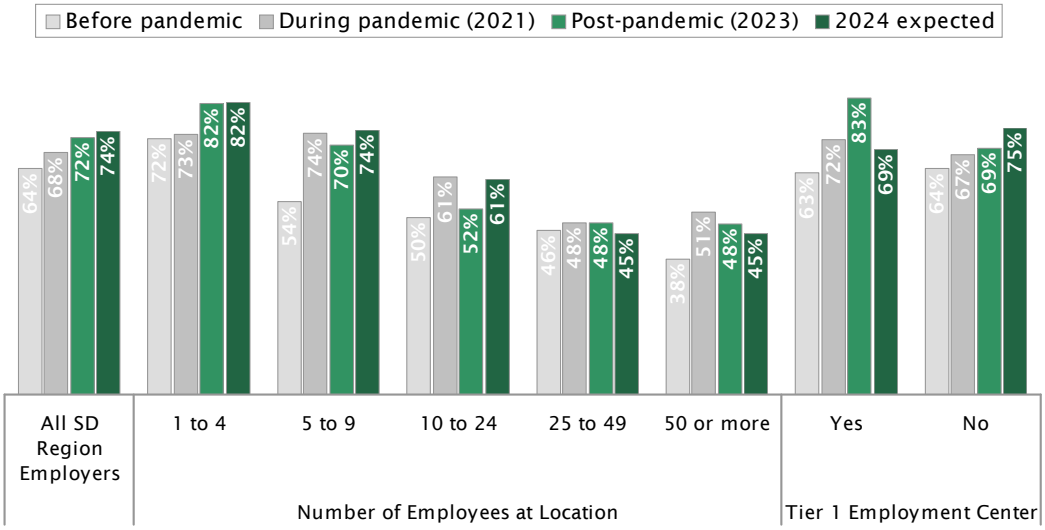


FIGURE 16 BUSINESS SURVEY: AVERAGE PERCENTAGE OF WORKFORCE TO RECEIVE REMOTE WORK OPTION IN 2024, OVERALL AND BY NUMBER OF EMPLOYEES AT LOCATION AND TIER 1 EMPLOYMENT CENTER



Employees' expectations for their remote work futures were also fairly stable. The percentage of employees who anticipated they would work from home at least one day per week in 2024 checked-in at 46%, approximately 7% higher than the current level in 2023. The anticipated uptick in the percentage working from home at least one day per week was echoed among nearly all employee subgroups regardless of industry, household income, and language (see Figures 17 & 18). However, when considering the average the number of days worked at home per week (see Figures 19 & 20), employees anticipated that 2024 (1.4 days) would look a lot like 2023 (1.3 days). The regionwide stability of employees' expectations with respect to the number of days they will work remotely in the next year was also found in nearly all subgroups.

FIGURE 17 EMPLOYEE SURVEY: PERCENTAGE OF EMPLOYEES WHO ANTICIPATE REMOTE WORKING 1+ DAYS PER WEEK IN 2024, OVERALL AND BY INDUSTRY

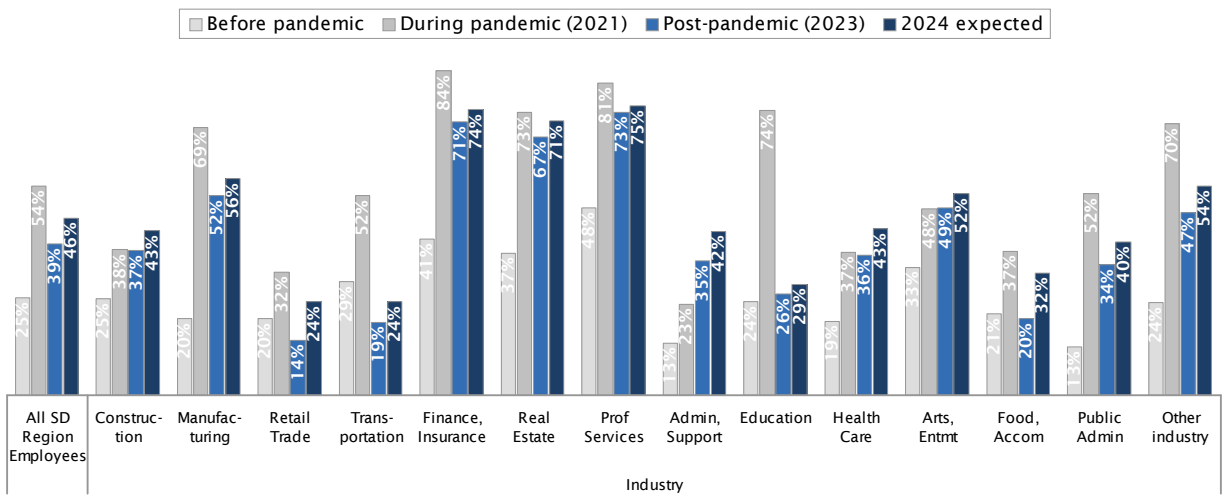


FIGURE 18 EMPLOYEE SURVEY: PERCENTAGE OF EMPLOYEES WHO ANTICIPATE REMOTE WORKING 1+ DAYS PER WEEK IN 2024, OVERALL AND BY HOUSEHOLD INCOME, INDEPENDENT CONTRACTOR STATUS, AND SURVEY LANGUAGE

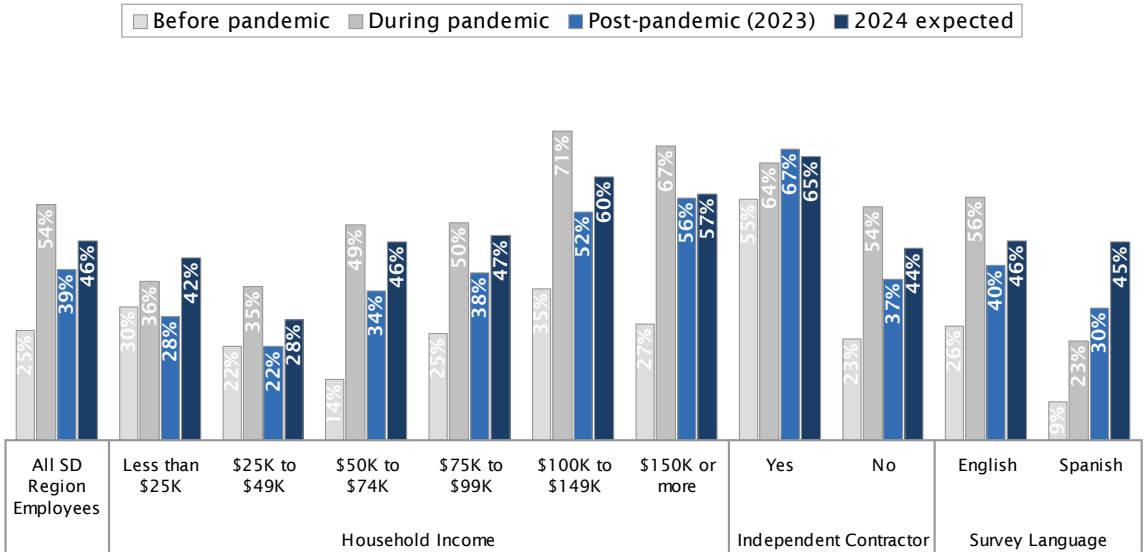


FIGURE 19 EMPLOYEE SURVEY: AVERAGE DAYS PER WEEK EXPECT TO PRIMARILY REMOTE WORK IN 2024, OVERALL AND BY INDUSTRY

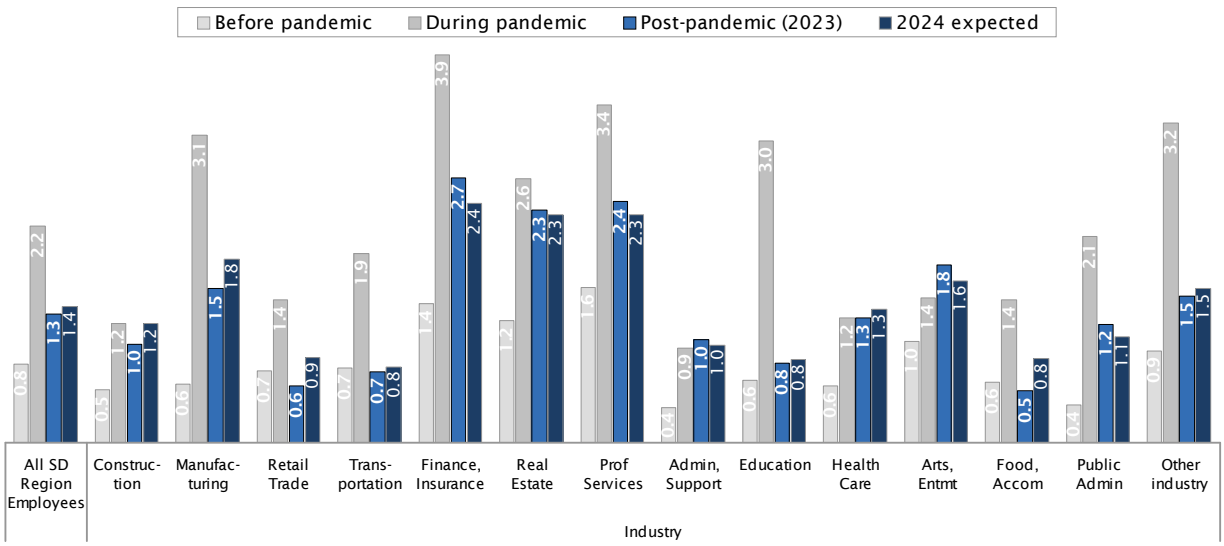


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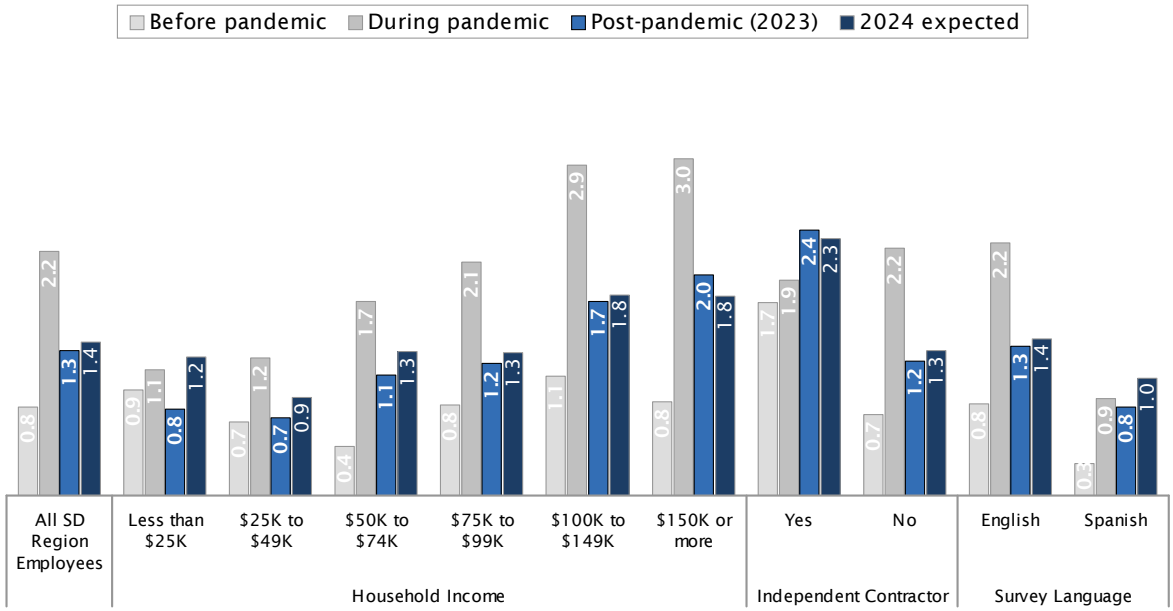
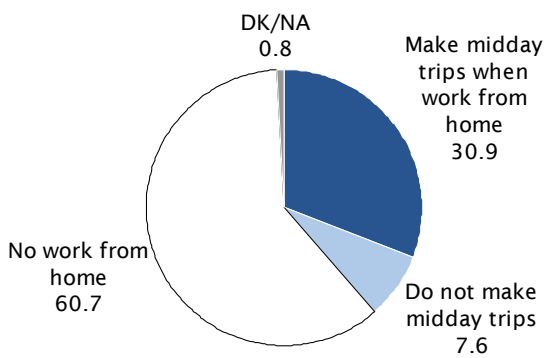
FIGURE 20 EMPLOYEE SURVEY: AVERAGE DAYS PER WEEK EXPECT TO PRIMARILY REMOTE WORK IN 2024, OVERALL AND BY HOUSEHOLD INCOME, INDEPENDENT CONTRACTOR STATUS, AND SURVEY LANGUAGE



Is remote work reducing VMT and emissions? Intuitively, an increase in remote work arrangements has the potential to reduce vehicle trips, vehicle miles traveled (VMT), and associated emissions. More people working from their home can also help reduce traffic congestion as fewer people are making trips during peak periods. The concern, however, is that those who choose to work from home (rather than the office) also have more opportunity to engage in midday trips for shopping, recreation, and other activities, thereby offsetting the VMT and emissions benefits that would otherwise result from eliminating the work commute.

To understand the prevalence of midday trips among those who work from home, the 2023 Employee Survey asked those who work from home at least one day per week to report on the frequency and timing of their midday trips, as well their mode choice and VMT. Figure 21 shows that among the 39% of respondents who worked from home at least one day per week, most (31%) reported that they occasionally leave the house to take midday trips. Stated differently, 80% of employees who telework reported taking midday trips.

FIGURE 21 EMPLOYEE SURVEY: MIDDAY TRIPS WHILE WORKING FROM HOME



In a typical day when working from home, most respondents indicated they make multiple trips, travel a combined 9.4 miles, and nearly all (82%) drive alone in a vehicle when making midday trips. In other words, the primary benefits of remote work in terms of trip, VMT, and emissions reductions appear to be offset to a significant degree by increases in midday trips made by those working at home.

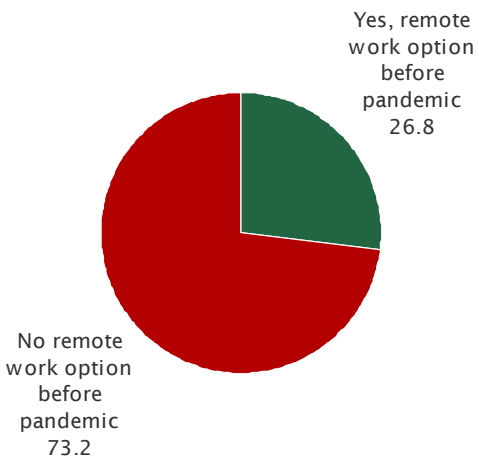
BUSINESSES: PRE-PANDEMIC

The opening question series in the 2021 business survey asked respondents to recall their remote work policies and practices *prior* to the pandemic—in January and February 2020. Did they offer employees the option of working remotely, and to what extent did employees do so?

REMOTE WORK OPTION GIVEN The first question in this series asked respondents whether, prior to pandemic, some employees within their company were given the option to work from home at least one day per week. As shown in Figure 22, nearly three-quarters of San Diego businesses (73%) indicated that the option to work remotely at least one day per week was *not* offered to any employees pre-pandemic, whereas approximately 27% indicated their company did provide a remote work option to one or more employees.

2021 Survey, Question 1 *For this first set of questions, I'd like you to think back to January and February 2020 - before the pandemic started. Before the pandemic started, were some employees at your company given the option to work from home at least one day per week?*

FIGURE 22 PRE-PANDEMIC: OPTION TO WORK FROM HOME AT LEAST 1 DAY PER WEEK



Figures 23-25 show how the percentage of businesses that offered a remote work option to some employees pre-pandemic varied by industry, number of employees at the respondent's location, whether the business was located in a Tier 1 Employment Center, number of employees located in San Diego County overall, and by specific Tier 1 Employment Centers.[10] The most striking differences occur by industry, with professional services, administrative and support services, and a collection of 'other' smaller industries[11] being much more likely than their counterparts to offer the option of working remotely pre-pandemic.

10. Tier 1 Employment Centers are areas with high densities of employment (at least 75,000 employees). There are three Tier 1 Employment Centers in the region (Downtown San Diego, Sorrento Valley, and Kearny Mesa).
11. The *Other Industry* category includes the following NAICS industries: Utilities, Public Administration, Information, Transportation and Warehousing, and Other Services (except Public Administration).

FIGURE 23 PRE-PANDEMIC: OPTION TO WORK FROM HOME AT LEAST 1 DAY PER WEEK BY INDUSTRY

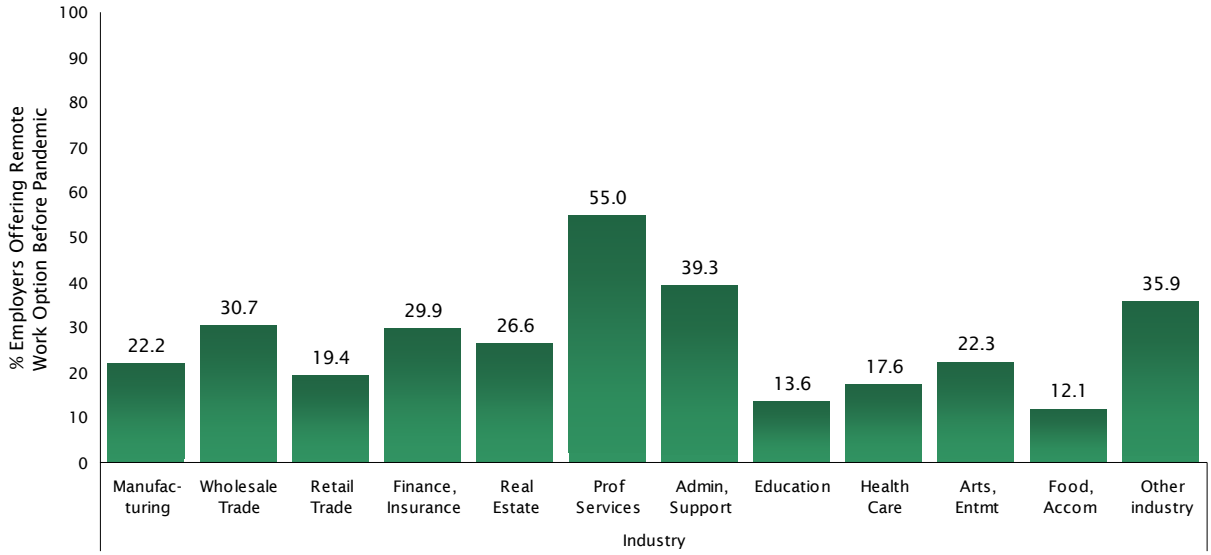


FIGURE 24 PRE-PANDEMIC: OPTION TO WORK FROM HOME AT LEAST 1 DAY PER WEEK BY NUMBER OF EMPLOYEES AT LOCATION & TIER 1 EMPLOYMENT CENTER

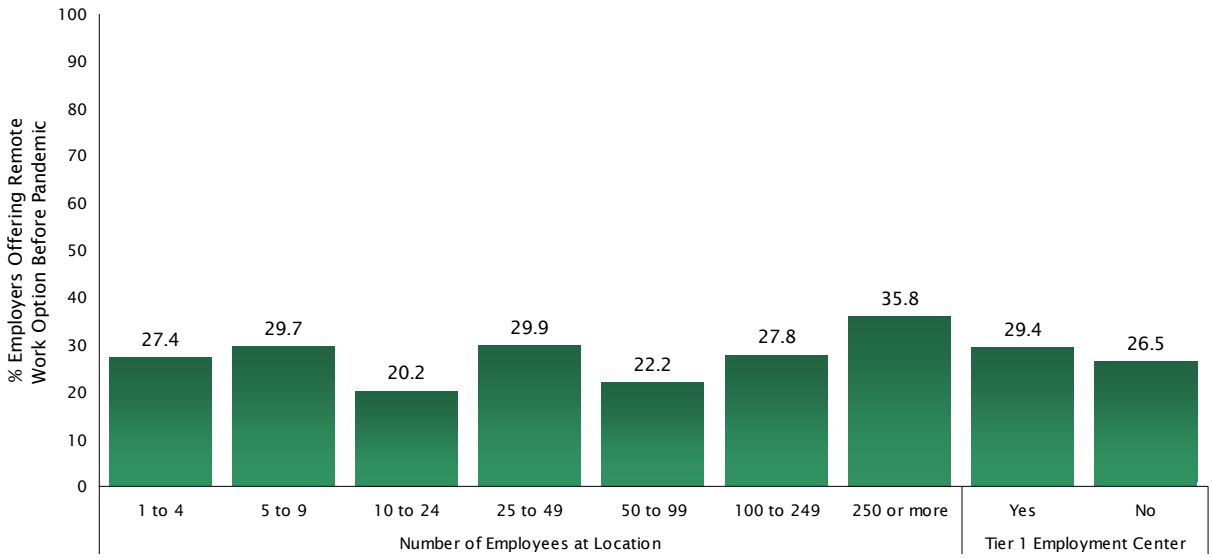
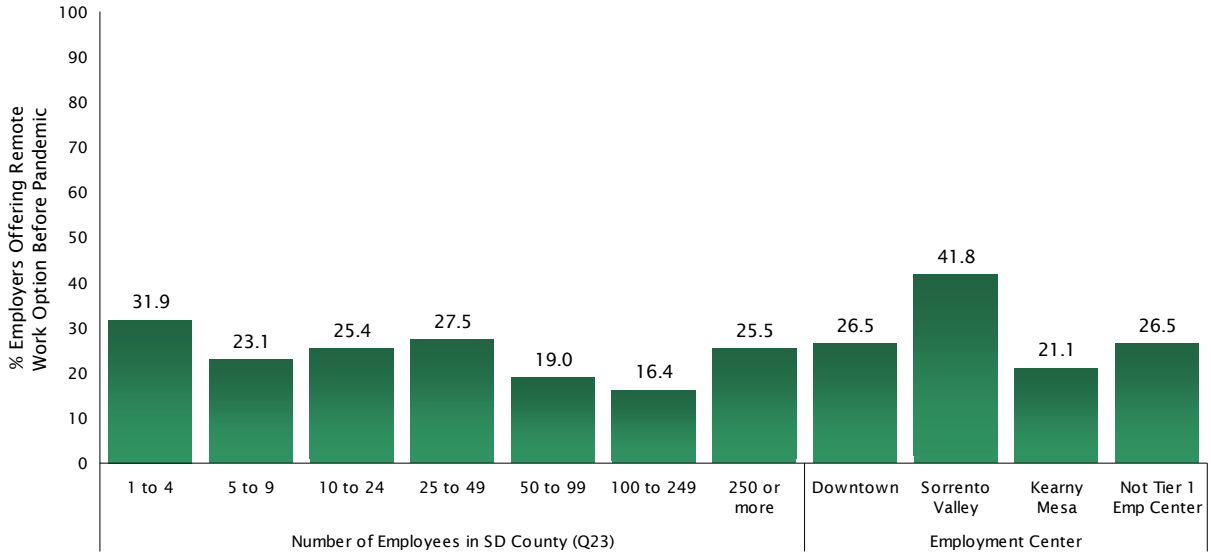


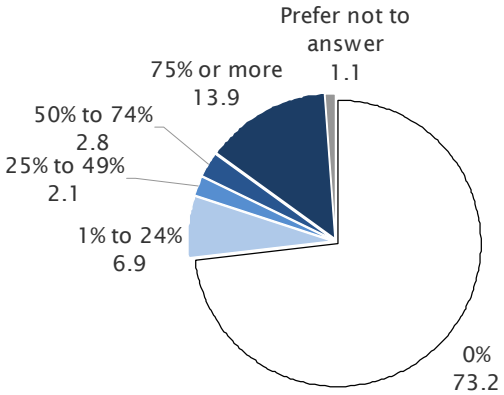
FIGURE 25 PRE-PANDEMIC: OPTION TO WORK FROM HOME AT LEAST 1 DAY PER WEEK BY NUMBER OF EMPLOYEES IN SD COUNTY & EMPLOYMENT CENTER



PERCENTAGE OF EMPLOYEES WITH REMOTE WORK OPTION Businesses that indicated they offered some employees the option to work remotely at least one day per week prior to the pandemic were subsequently asked to estimate the percentage of their company's employees that were given the option to work remotely. Figure 26 on the next page combines the answers to questions 1 and 2 to place the findings in the context of *all* businesses in the region. As noted above, 73% indicated that no employees (0%) were offered the option to work remotely at least one day per week. The remaining businesses varied in how widely they distributed the option, with 7% offering less than one-quarter of their employees the option to work remotely, 2% offering it to 25% to 49% of their employees, 3% offering it to 50% to 74% of employees, and 14% providing the option to three-quarters or more of their employees.

2021 Survey, Question 2 *Approximately what percentage of your company's employees had the option to work from home at least one day per week?*

FIGURE 26 PRE-PANDEMIC: PERCENTAGE OF EMPLOYEES WITH OPTION TO WORK FROM HOME AT LEAST 1 DAY PER WEEK



Figures 27-29 display the percentage of business that offered a remote work option to some employees pre-pandemic, as well as how widely that option was offered within their company, by various business characteristics. Here again, the most striking differences occur by industry, with the percentage of businesses that offered more than three-quarters of their employees the option to work remotely ranging from less than 3% (healthcare) to 34% (professional services).

FIGURE 27 PRE-PANDEMIC: PERCENTAGE OF EMPLOYEES WITH OPTION TO WORK FROM HOME AT LEAST 1 DAY PER WEEK BY OVERALL & INDUSTRY [12]

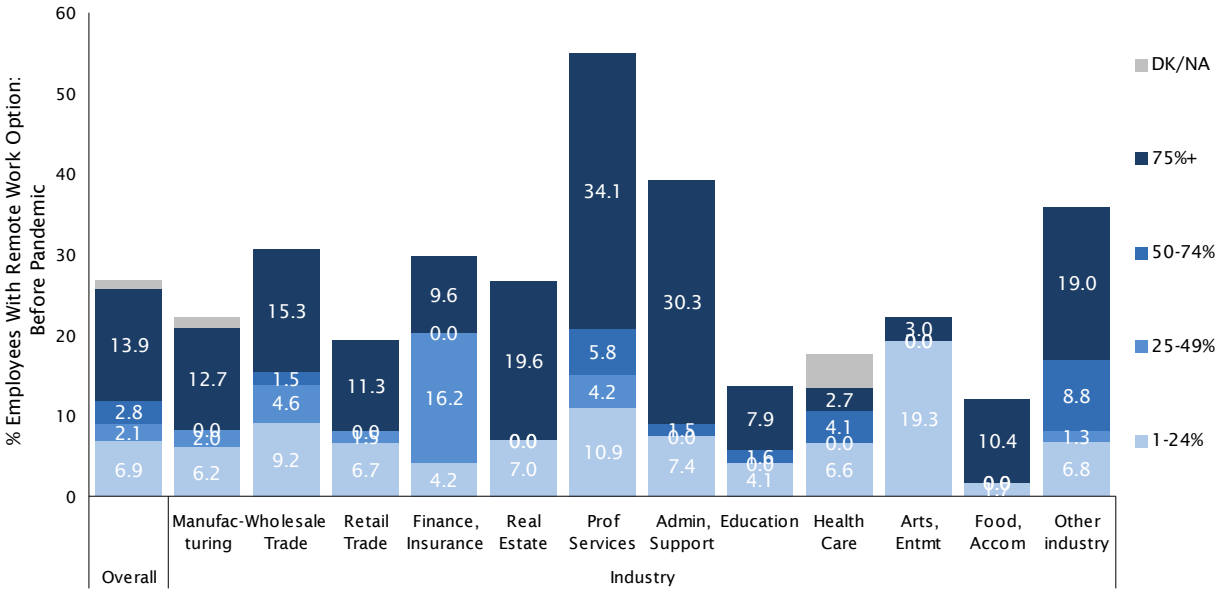
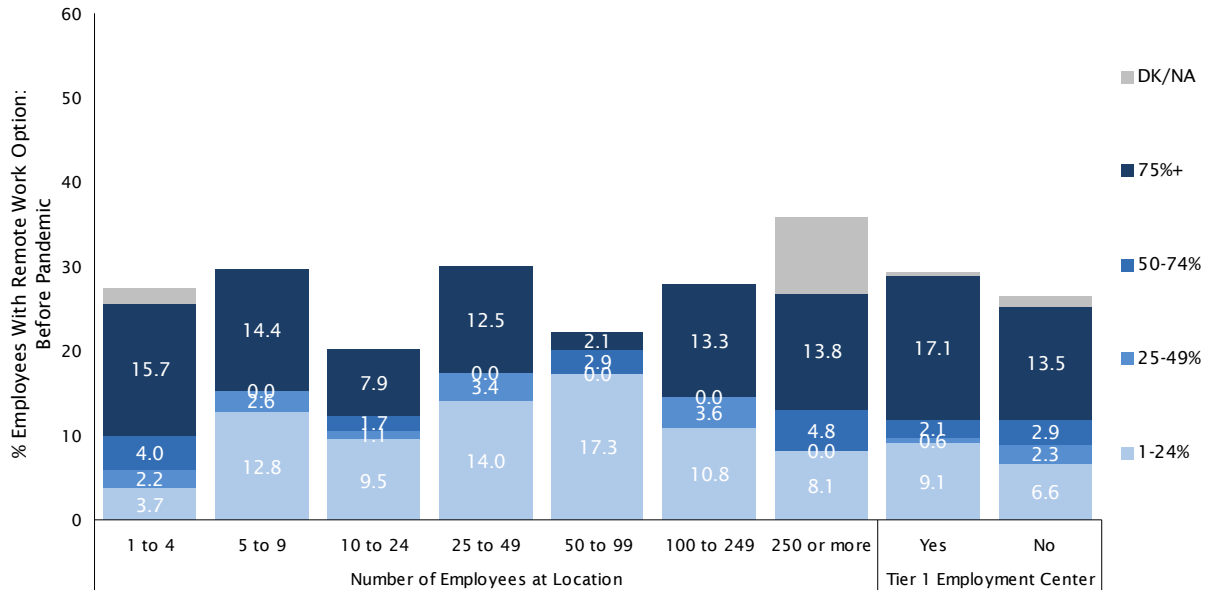
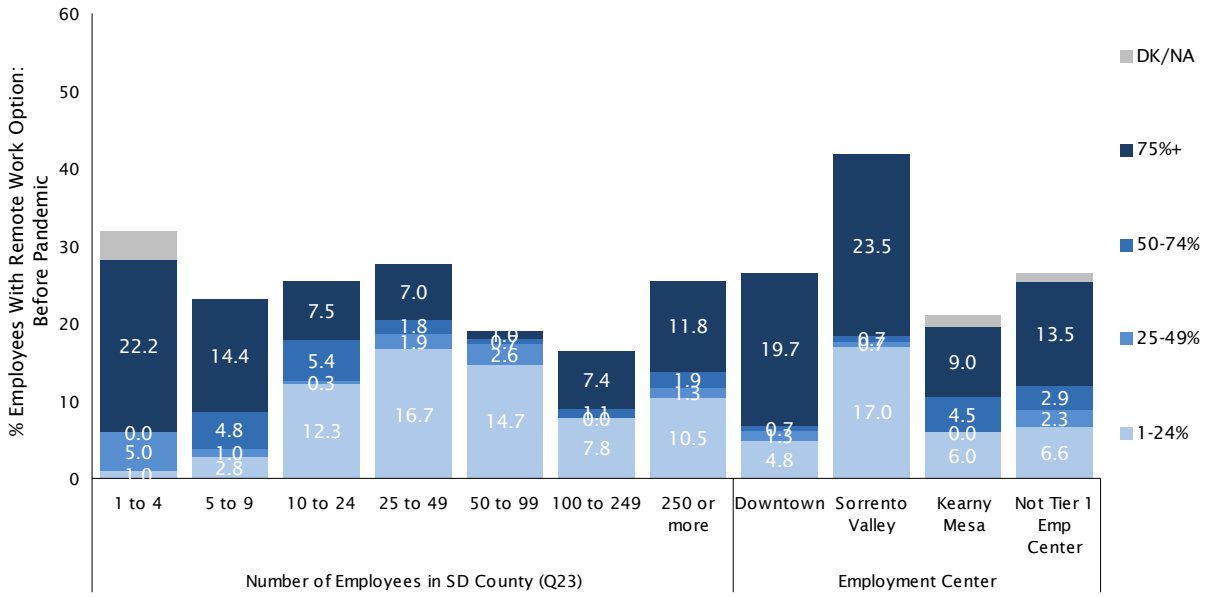


FIGURE 28 PRE-PANDEMIC: PERCENTAGE OF EMPLOYEES WITH OPTION TO WORK FROM HOME AT LEAST 1 DAY PER WEEK BY NUMBER OF EMPLOYEES AT LOCATION & TIER 1 EMPLOYMENT CENTER



12. Employees without a remote work option are represented by the negative white space in these figures. Employees who preferred to not answer a question are captured in the DK/NA category (Don't Know/No Answer).

FIGURE 29 PRE-PANDEMIC: PERCENTAGE OF EMPLOYEES WITH OPTION TO WORK FROM HOME AT LEAST 1 DAY PER WEEK BY NUMBER OF EMPLOYEES IN SD COUNTY & EMPLOYMENT CENTER

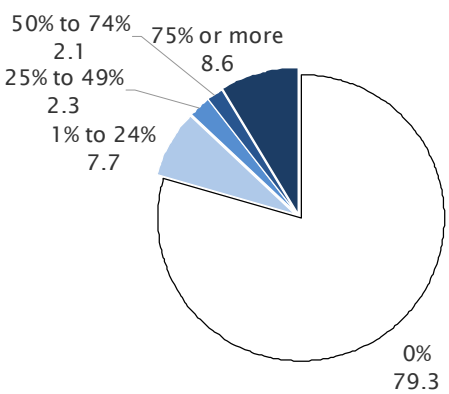


PERCENTAGE OF EMPLOYEES WORKING REMOTELY 1+ DAYS PER WEEK

Providing employees the *option* to work remotely is a policy decision, one that does not necessarily translate to employees choosing to work remotely in practice. Accordingly, Question 3 of the Business Survey asked respondents whose businesses offered a remote work option to estimate the percentage of their workforce that actually worked from home at least one day per week, pre-pandemic.

2021 Survey, Question 3 *Before the pandemic started, approximately what percentage of your company's employees actually worked from home at least one day per week?*

FIGURE 30 PRE-PANDEMIC: PERCENTAGE OF EMPLOYEES THAT WORKED FROM HOME AT LEAST 1 DAY PER WEEK



As expected, businesses reported that fewer employees worked from home in practice prior to the pandemic when compared the percentage that were given the option to do so. Overall, 21% of businesses indicated that at least some employees worked from home one or more days per week (Figure 30). Businesses tended to fall into one extreme or the other in terms of the *percentage* of their employees who worked remotely, with 8% reporting that less than one-quarter of employees actually worked remotely and 9% stating at least three-quarters of employees worked remotely one or more days per week. Figures 31-33 show how the percentage of their workforce that businesses indicated worked remotely at least one day per week prior to the pandemic varied by key business attributes.

FIGURE 31 PRE-PANDEMIC: PERCENTAGE OF EMPLOYEES THAT WORKED FROM HOME AT LEAST 1 DAY PER WEEK BY OVERALL & INDUSTRY

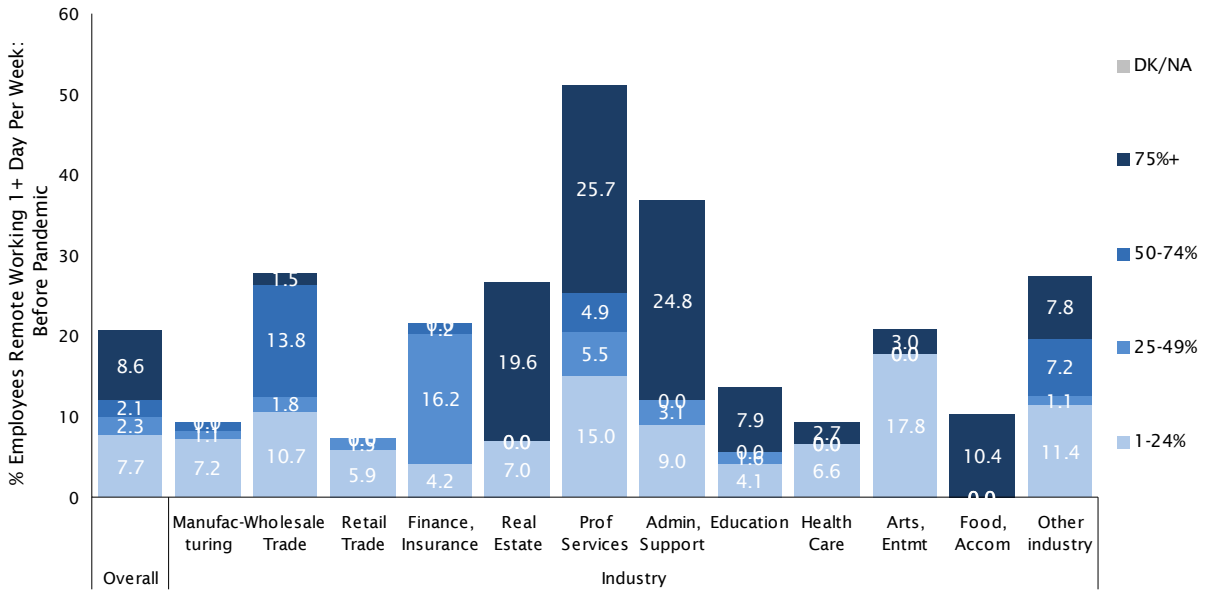


FIGURE 32 PRE-PANDEMIC: PERCENTAGE OF EMPLOYEES THAT WORKED FROM HOME AT LEAST 1 DAY PER WEEK BY NUMBER OF EMPLOYEES AT LOCATION & TIER 1 EMPLOYMENT CENTER

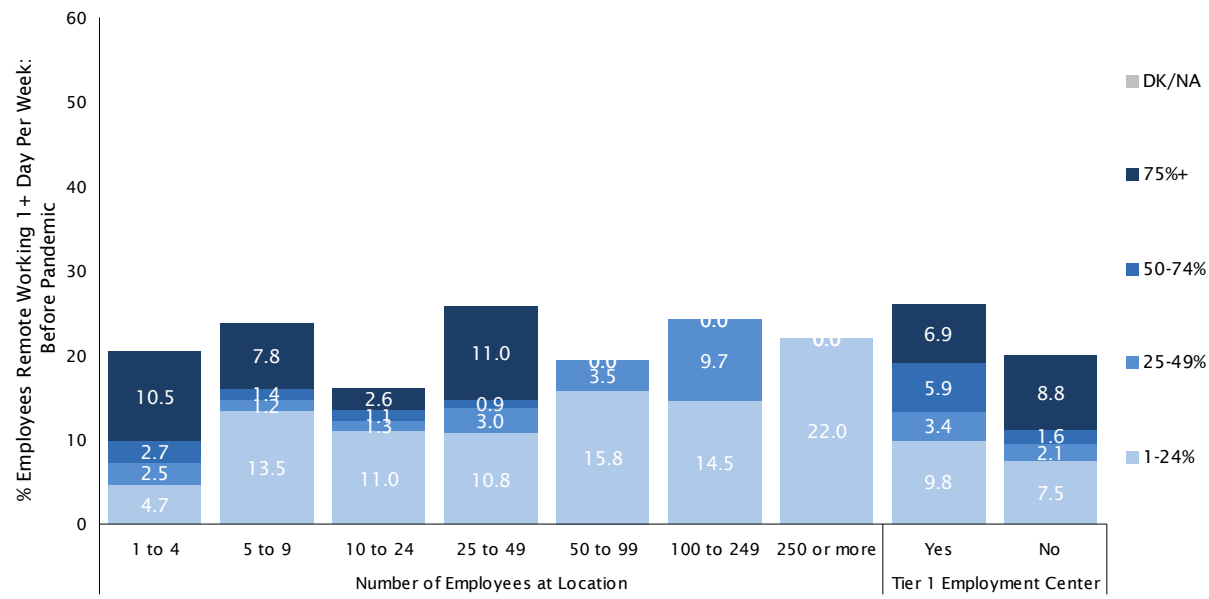
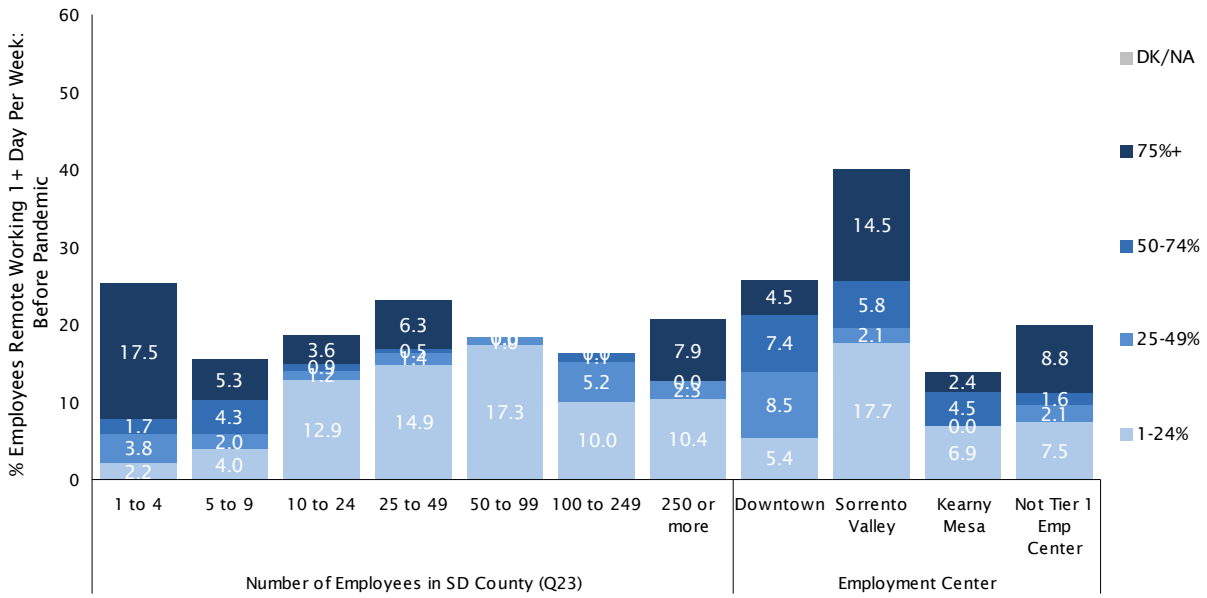


FIGURE 33 PRE-PANDEMIC: PERCENTAGE OF EMPLOYEES THAT WORKED FROM HOME AT LEAST 1 DAY PER WEEK BY NUMBER OF EMPLOYEES IN SD COUNTY & EMPLOYMENT CENTER

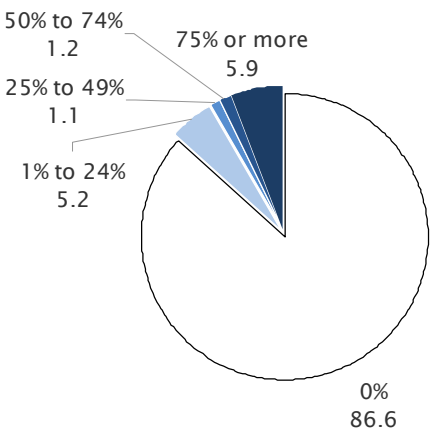


PERCENTAGE OF EMPLOYEES WORKING REMOTELY 3+ DAYS PER WEEK

The final question in the opening series asked businesses that offered a remote work option to employees to estimate the percentage of their workforce that worked from home most of the time—at least three days per week—prior to the pandemic.

2021 Survey, Question 4 *Before the pandemic started, approximately what percentage of your company's employees worked from home most of the time - at least three days per week?*

FIGURE 34 PRE-PANDEMIC: PERCENTAGE OF EMPLOYEES THAT WORKED FROM HOME AT LEAST 3 DAYS PER WEEK



Overall, just 13% of businesses in the San Diego region indicated that one or more employees in their organization worked from home at least three days per week during this period (Figure 34), with 5% indicating that less than one-quarter did so, 1% stating 25% to 49%, 1% indicating 50% to 74%, and 6% reporting that at least three-quarters of their employees worked remotely prior to the pandemic. As shown in Figures 35-37, businesses with at least three-quarters of their employees working from home three or more days per week prior to the pandemic tended to be concentrated in certain industries (professional services) and have less than five employees in the County.

FIGURE 35 PRE-PANDEMIC: PERCENTAGE OF EMPLOYEES THAT WORKED FROM HOME AT LEAST 3 DAYS PER WEEK BY OVERALL & INDUSTRY

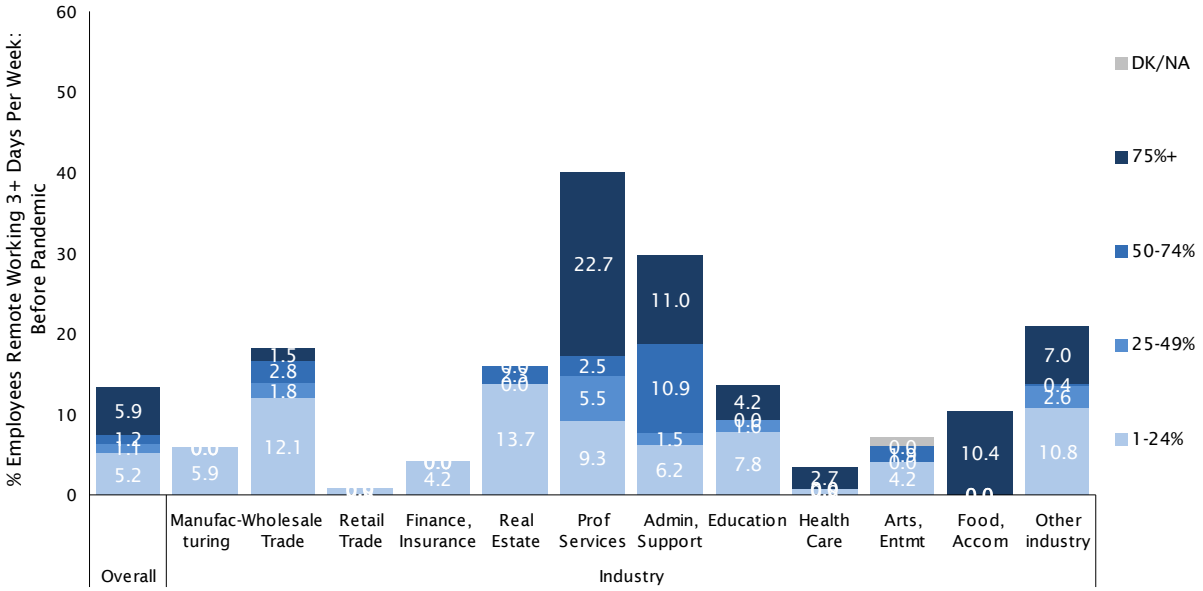


FIGURE 36 PRE-PANDEMIC: PERCENTAGE OF EMPLOYEES THAT WORKED FROM HOME AT LEAST 3 DAYS PER WEEK BY NUMBER OF EMPLOYEES AT LOCATION & TIER 1 EMPLOYMENT CENTER

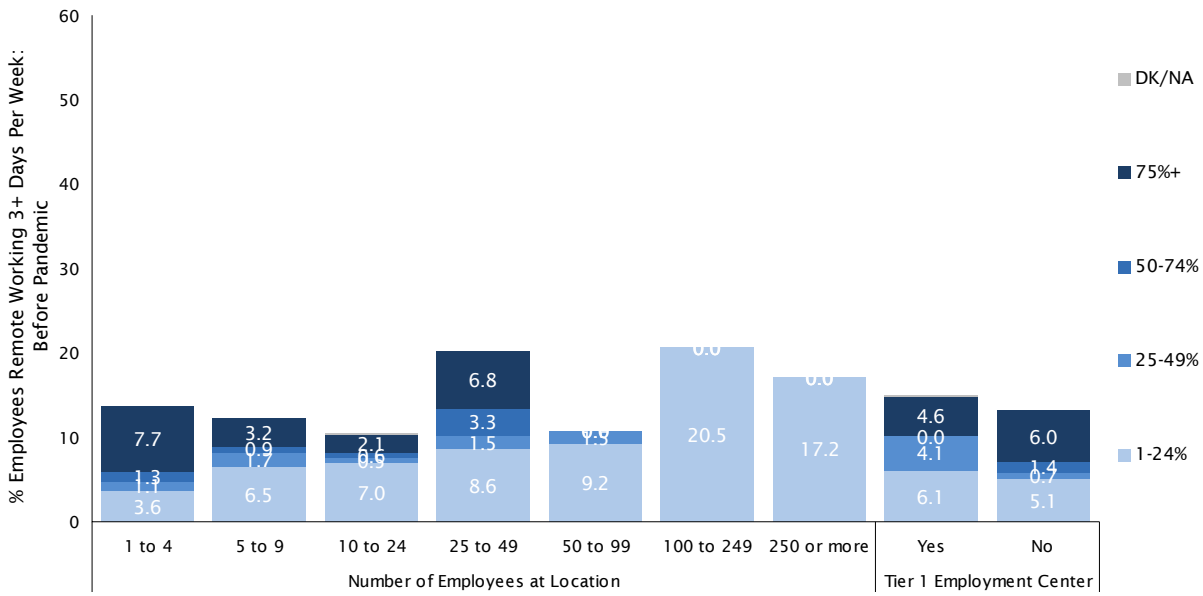
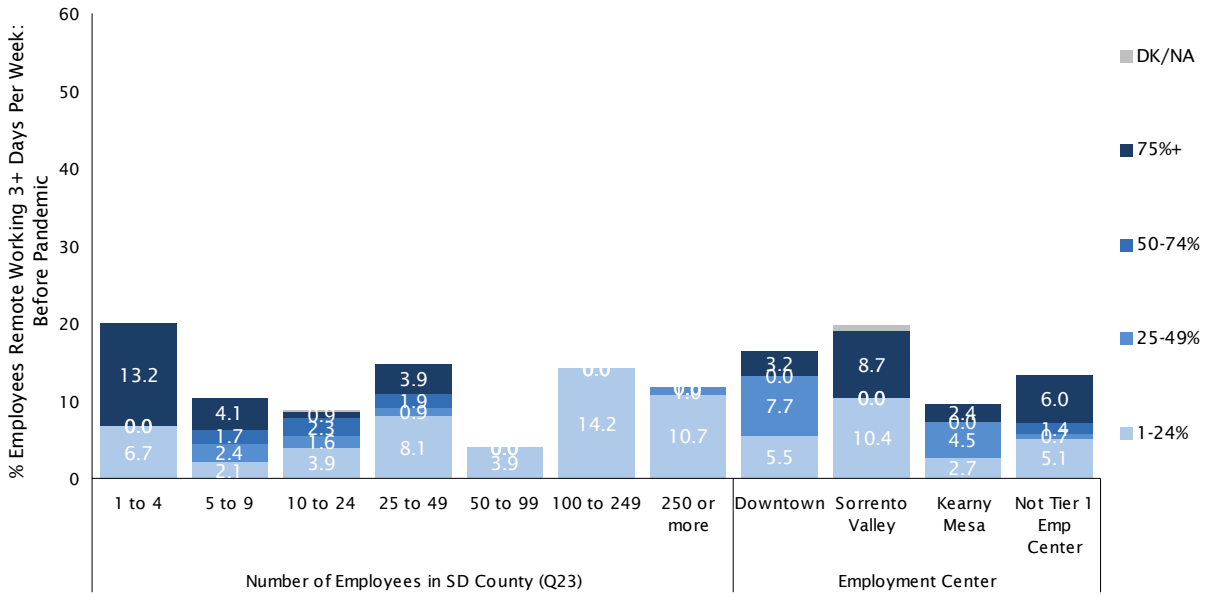


FIGURE 37 PRE-PANDEMIC: PERCENTAGE OF EMPLOYEES THAT WORKED FROM HOME AT LEAST 3 DAYS PER WEEK BY NUMBER OF EMPLOYEES IN SD COUNTY & EMPLOYMENT CENTER



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Businesses: During Pandemic

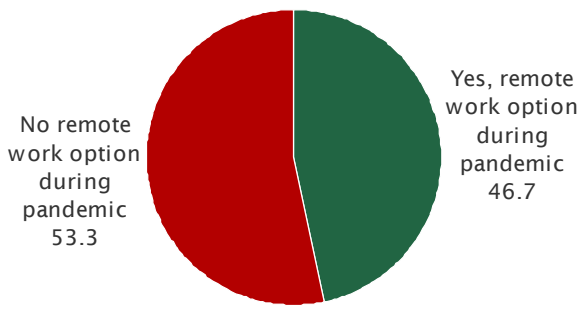
Having captured the remote work policies and practices of San Diego businesses prior to the pandemic, the 2021 baseline survey next asked businesses to report on their remote work patterns at the time of the survey (during the pandemic).

REMOTE WORK OPTION GIVEN

The pandemic compelled many businesses in the San Diego region to shift to a remote work model, at least for certain employees. Whereas approximately one-quarter (27%) of businesses offered some employees the option to work remotely prior to the pandemic (see Figure 22 on page 18), nearly half of businesses surveyed (47%) indicated that they provided this option to employees during the pandemic (Figure 38).

2021 Survey, Question 5 *Next, I'd like to ask about your company's current practices - during the pandemic. Currently, are some employees at your company given the option to work from home at least one day per week?*

Figure 38 During Pandemic: Option to Work From Home at Least 1 Day Per Week



An increase in the number of businesses offering a remote work option to some employees was found in all industries, company sizes, and locations in the region, but the magnitude of the shift varied. Comparing Figures 39-41 to their pre-pandemic counterparts reveals that the largest increases in companies offering a remote work option during the pandemic occurred in the education, arts/entertainment, and finance/insurance industries, businesses with 25 or more employees at their location, businesses with 50 or more employees in the region, and those located in a Tier 1 Employment Center (generally) and the Downtown Employment Center (specifically).

Figure 39 During Pandemic: Option to Work From Home at Least 1 Day Per Week by Industry

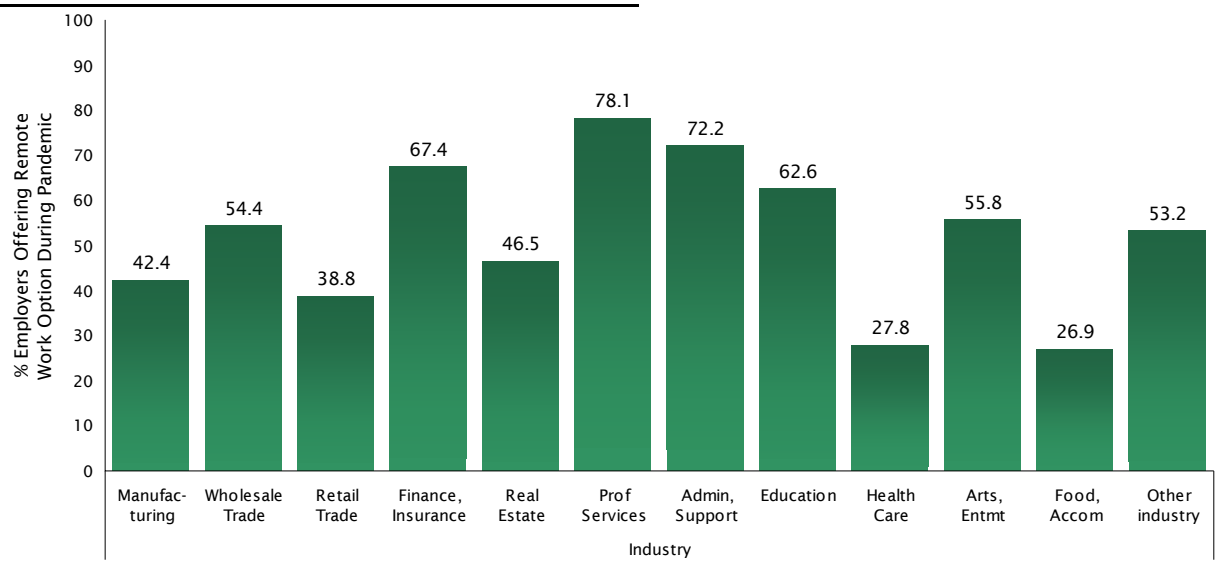


FIGURE 40 DURING PANDEMIC: OPTION TO WORK FROM HOME AT LEAST 1 DAY PER WEEK BY NUMBER OF EMPLOYEES AT LOCATION, TIER 1 EMPLOYMENT CENTER & REMOTE WORK OPTION BEFORE PANDEMIC

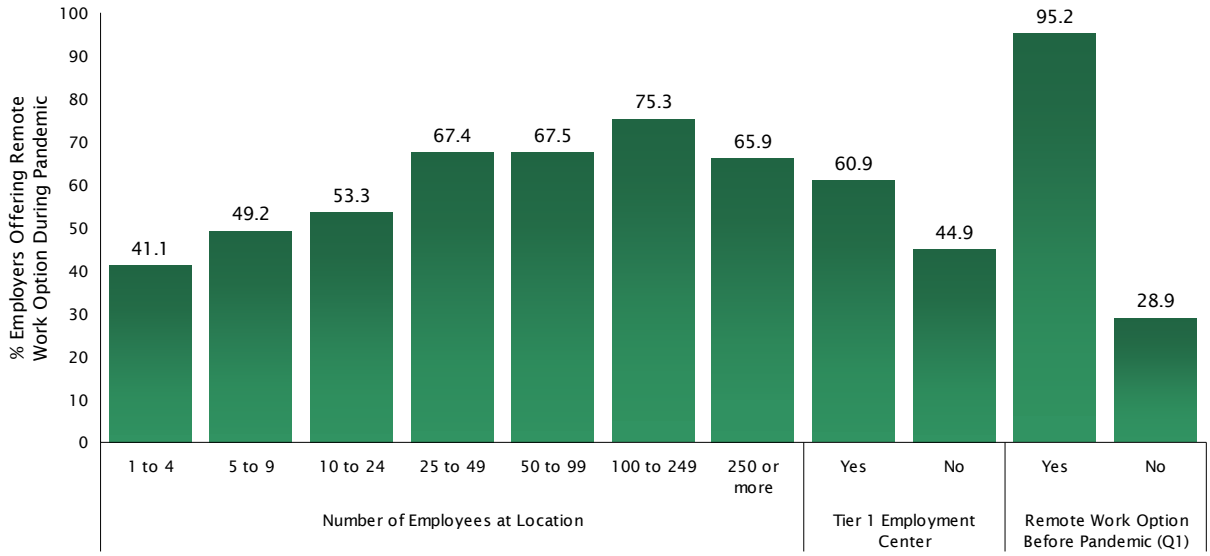
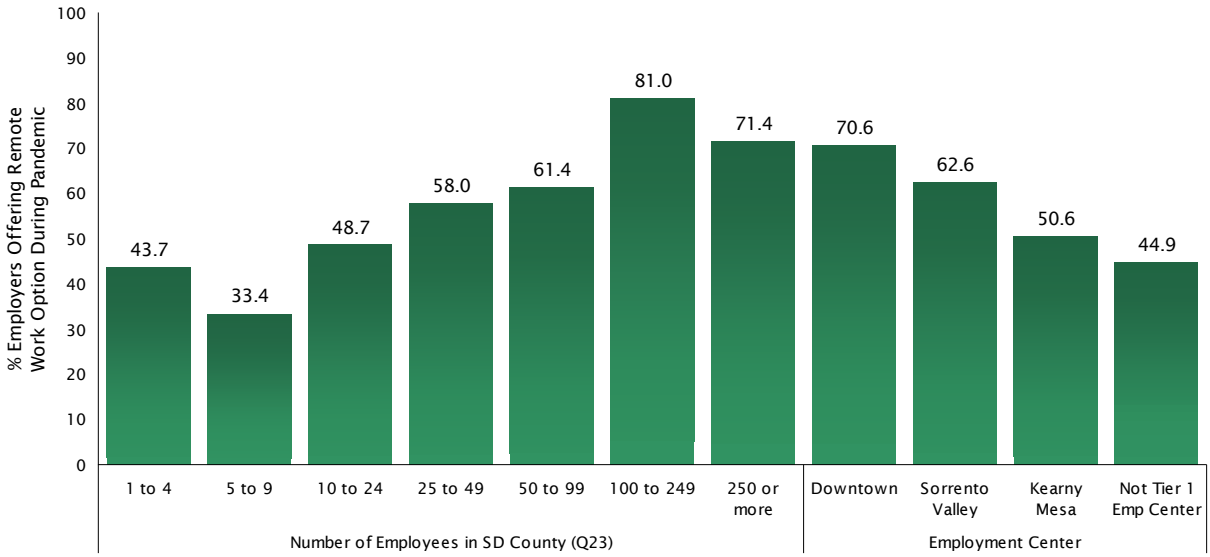


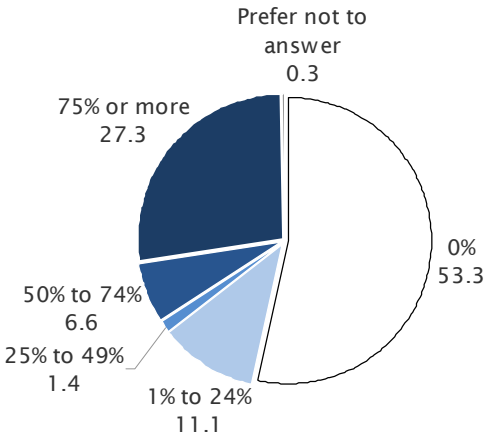
FIGURE 41 DURING PANDEMIC: OPTION TO WORK FROM HOME AT LEAST 1 DAY PER WEEK BY NUMBER OF EMPLOYEES IN SD COUNTY & EMPLOYMENT CENTER



PERCENTAGE OF EMPLOYEES WITH REMOTE WORK OPTION Businesses that indicated they offered some employees the option to work remotely at least one day per week during the pandemic were subsequently asked to estimate the percentage of their company's employees that were given the option to work remotely (see Figure 42). Just over half of San Diego businesses (53%) indicated they did *not* offer a remote work option, while the remainder were split between those who offered it to less than one-quarter of employees (11%), 25% to 49% of their workforce (1%), 50% to 74% of employees (7%), and three-quarters or more of their workforce (27%). Overall, the percentage of businesses that provided a remote work option to at least three-quarters of their employees *doubled* in response to the pandemic, from 14% (see Figure 26 on page 20) to 27% (Figure 42).

2021 Survey, Question 6 *Approximately what percentage of your company's employees currently have the option to work from home at least one day per week?*

FIGURE 42 DURING PANDEMIC: PERCENTAGE OF EMPLOYEES WITH OPTION TO WORK FROM HOME AT LEAST 1 DAY PER WEEK



Figures 43-45 display the percentage of business surveyed that offered a remote work option to some employees during the pandemic, as well as how widely that option was being offered within their company, by various business characteristics. Businesses in the professional services, administrative and support services, arts/entertainment, and education industries and those in Tier 1 Employment Centers were the most likely to report offering a remote work option to at least 75% of their employees.

FIGURE 43 DURING PANDEMIC: PERCENTAGE OF EMPLOYEES WITH OPTION TO WORK FROM HOME AT LEAST 1 DAY PER WEEK BY OVERALL & INDUSTRY

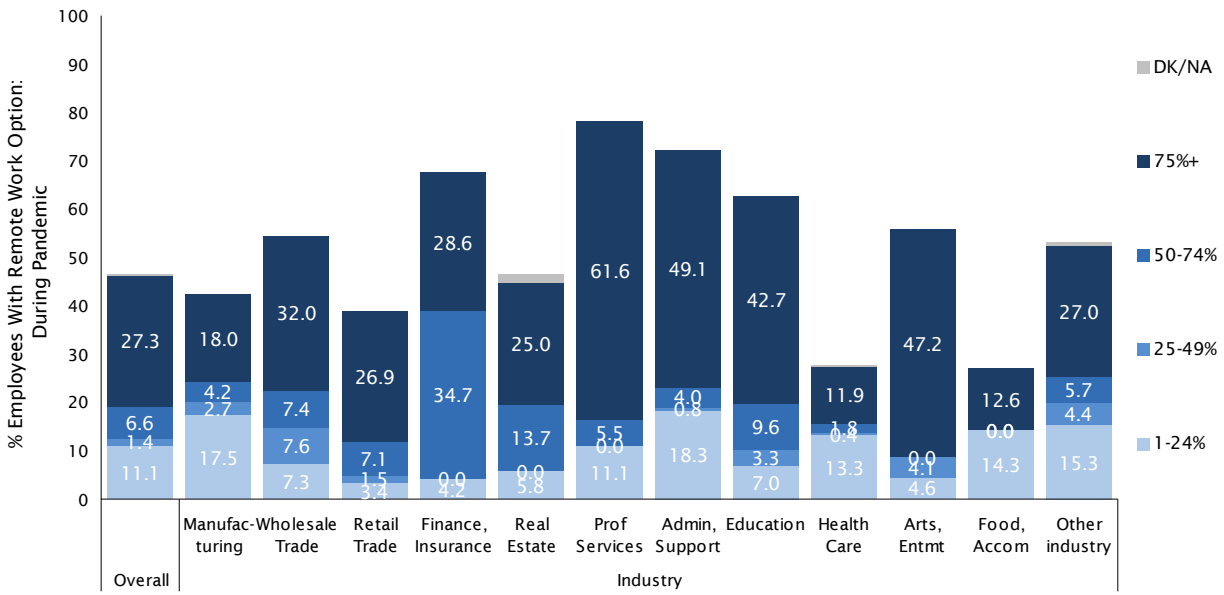


FIGURE 44 DURING PANDEMIC: PERCENTAGE OF EMPLOYEES WITH OPTION TO WORK FROM HOME AT LEAST 1 DAY PER WEEK BY NUMBER OF EMPLOYEES AT LOCATION & TIER 1 EMPLOYMENT CENTER

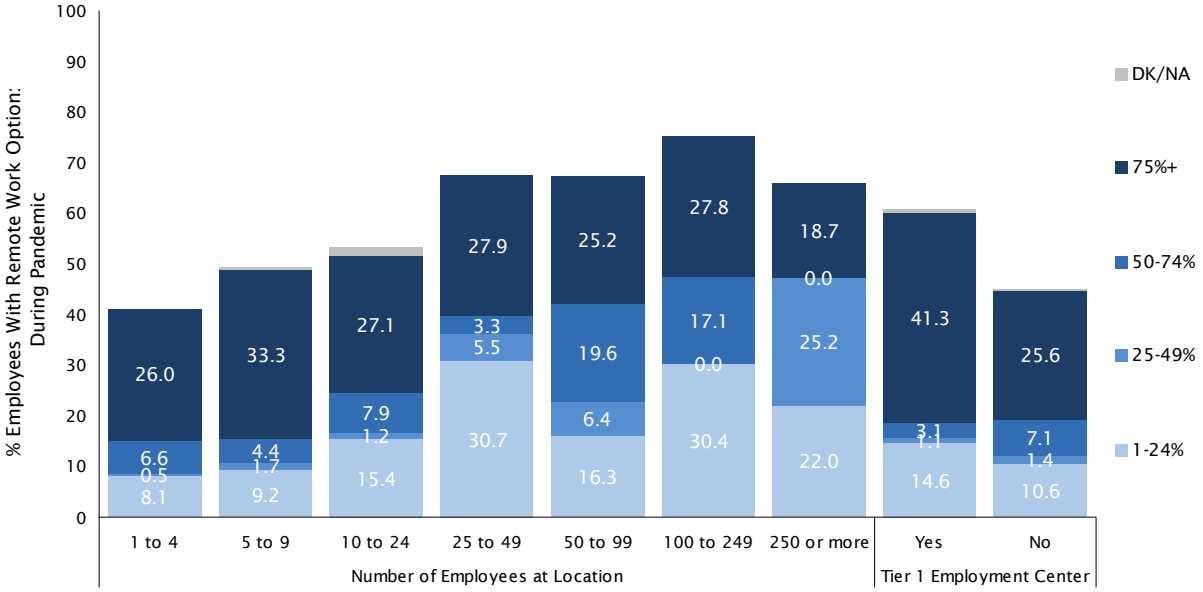
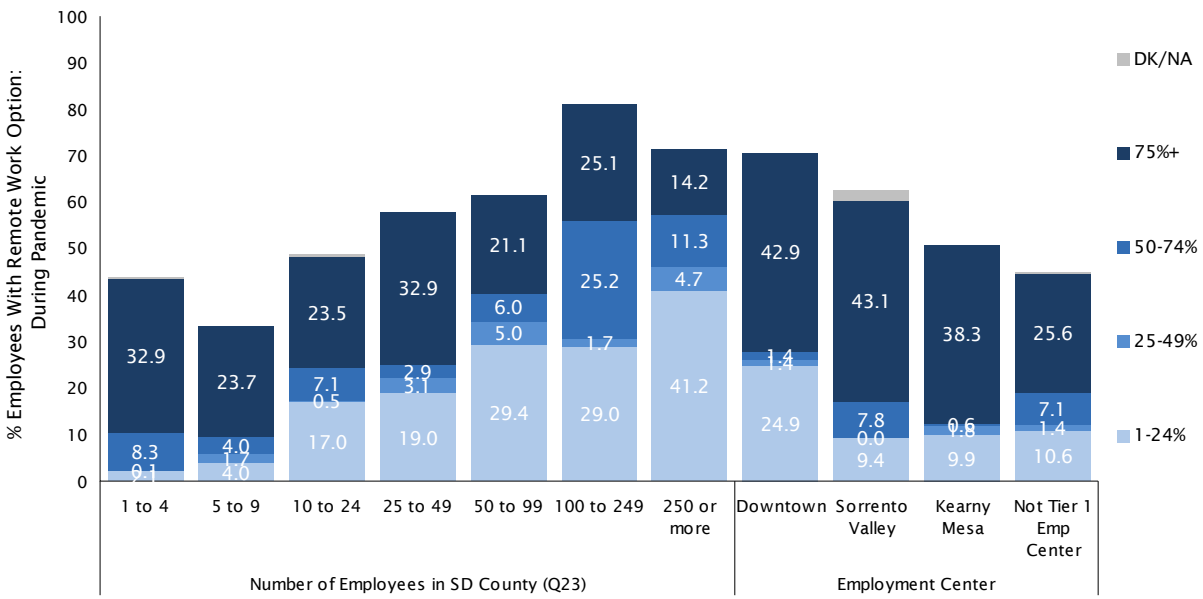


FIGURE 45 DURING PANDEMIC: PERCENTAGE OF EMPLOYEES WITH OPTION TO WORK FROM HOME AT LEAST 1 DAY PER WEEK BY NUMBER OF EMPLOYEES IN SD COUNTY & EMPLOYMENT CENTER

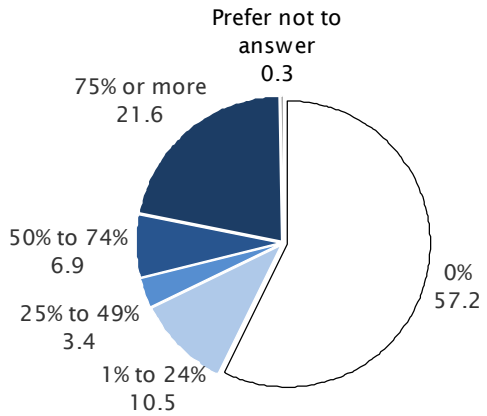


PERCENTAGE OF EMPLOYEES WORKING REMOTELY 1+ DAYS PER WEEK

As San Diego businesses loosened their remote work policies during the pandemic, more employees began to work from home at least one day per week. As shown in Figure 46, more than one-in-five businesses (22%) estimated that at least three-quarters of their employees were working from home at the time of the interview (during the pandemic), which was up from 9% during the pre-pandemic period. An additional 7% of businesses estimated 50% to 74% of employees were working from home, three percent estimated 25% to 49% of employees were working from home, whereas 11% indicated that less than one-quarter of employees worked from home.

2021 Survey, Question 7 *Currently, approximately what percentage of your company's employees actually work from home at least one day per week?*

FIGURE 46 DURING PANDEMIC: PERCENTAGE OF EMPLOYEES THAT WORK FROM HOME AT LEAST 1 DAY PER WEEK



As one might expect, businesses in specific industries and locations that were the most likely to offer a remote work option to at least 75% of employees (see Figures 43-46) were also the most likely to estimate that at least three-quarters of their workforce was working remotely at least one day per week during the pandemic (see Figures 47-49).

FIGURE 47 DURING PANDEMIC: PERCENTAGE OF EMPLOYEES THAT WORK FROM HOME AT LEAST 1 DAY PER WEEK BY OVERALL & INDUSTRY

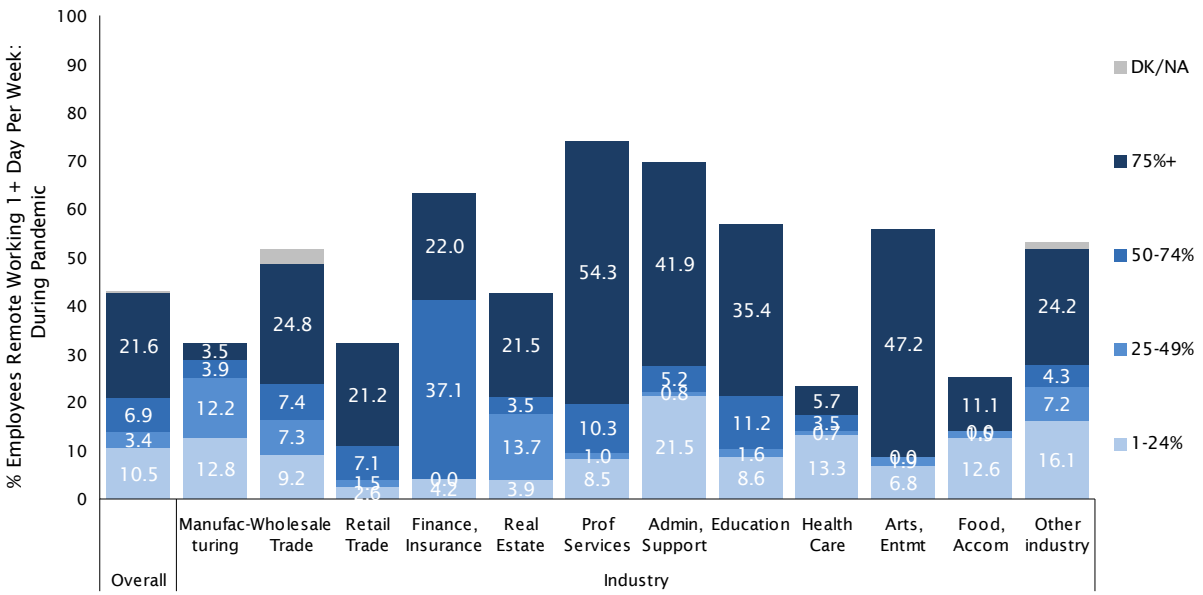


FIGURE 48 DURING PANDEMIC: PERCENTAGE OF EMPLOYEES THAT WORK FROM HOME AT LEAST 1 DAY PER WEEK BY NUMBER OF EMPLOYEES AT LOCATION & TIER 1 EMPLOYMENT CENTER

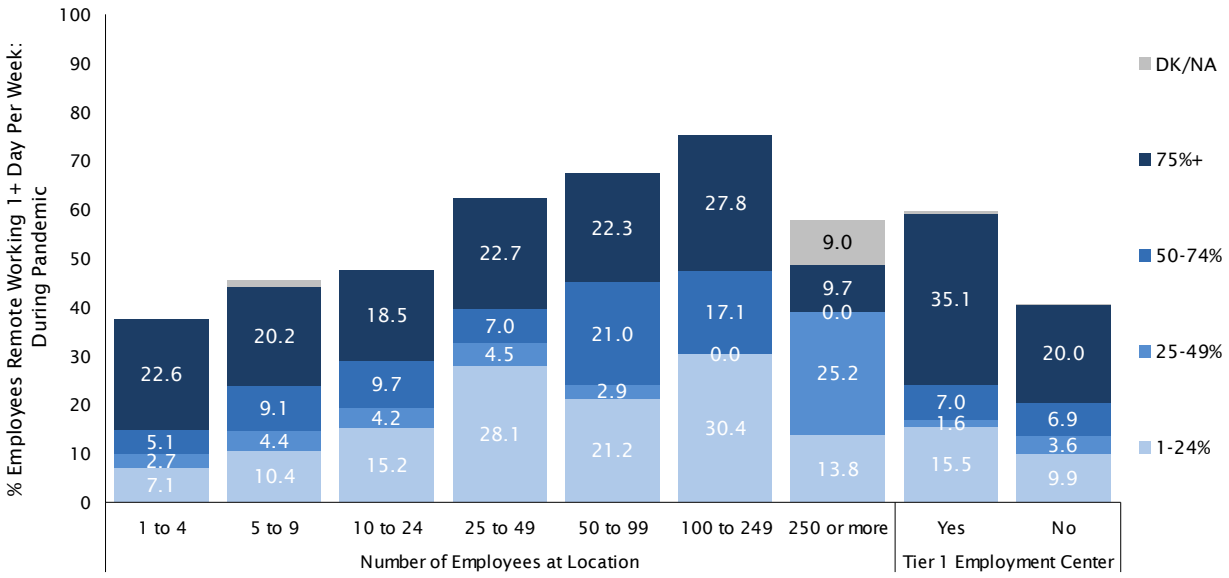
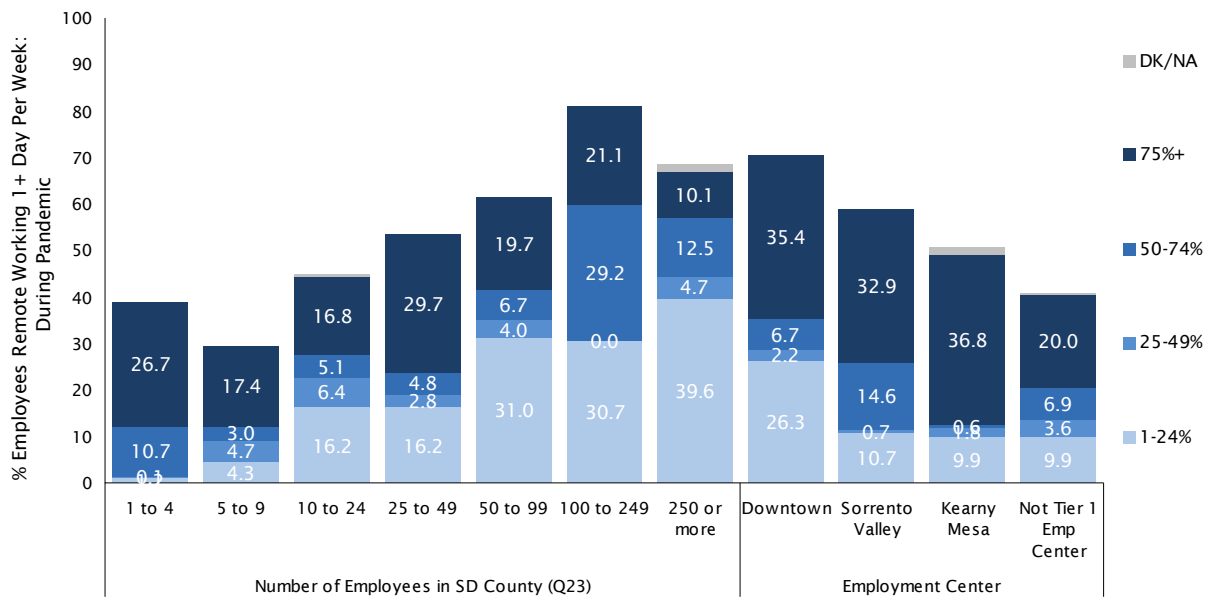


FIGURE 49 DURING PANDEMIC: PERCENTAGE OF EMPLOYEES THAT WORK FROM HOME AT LEAST 1 DAY PER WEEK BY NUMBER OF EMPLOYEES IN SD COUNTY & EMPLOYMENT CENTER



PERCENTAGE OF EMPLOYEES WORKING REMOTELY 3+ DAYS PER WEEK

When asked during the pandemic to estimate the percentage of their workforce that was working from home at least three days per week, approximately 38% of businesses in the San Diego region indicated that one or more employees in their organization were working from home most of the time (Figure 50), with 11% indicating that less than one-quarter were doing so, 4% stating 25% to 49%, 4% indicating 50% to 74%, and 18% reporting that at least three-quarters of

their employees were working remotely most days. The percentage of businesses that estimated the majority of their workforce was working from home *most* of the time increased from 7% prior to the pandemic to 22% during the pandemic. Here again, businesses in the professional services, administrative and support services, arts/entertainment, and education industries and those in Tier 1 Employment Centers were the most likely to report having at least 75% of their employees working remotely three or more days per week (see Figures 51-53).

2021 Survey, Question 8 *Currently, approximately what percentage of your company's employees work from home most of the time - at least three days per week?*

FIGURE 50 DURING PANDEMIC: PERCENTAGE OF EMPLOYEES THAT WORK FROM HOME AT LEAST 3 DAYS PER WEEK

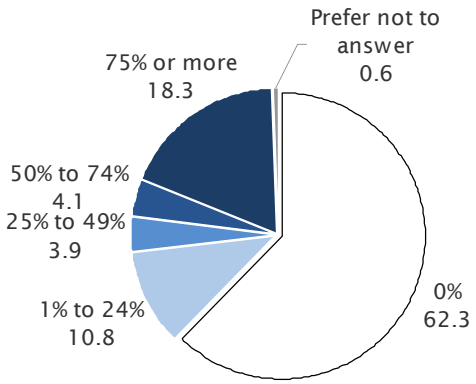


FIGURE 51 DURING PANDEMIC: PERCENTAGE OF EMPLOYEES THAT WORK FROM HOME AT LEAST 3 DAYS PER WEEK BY OVERALL & INDUSTRY

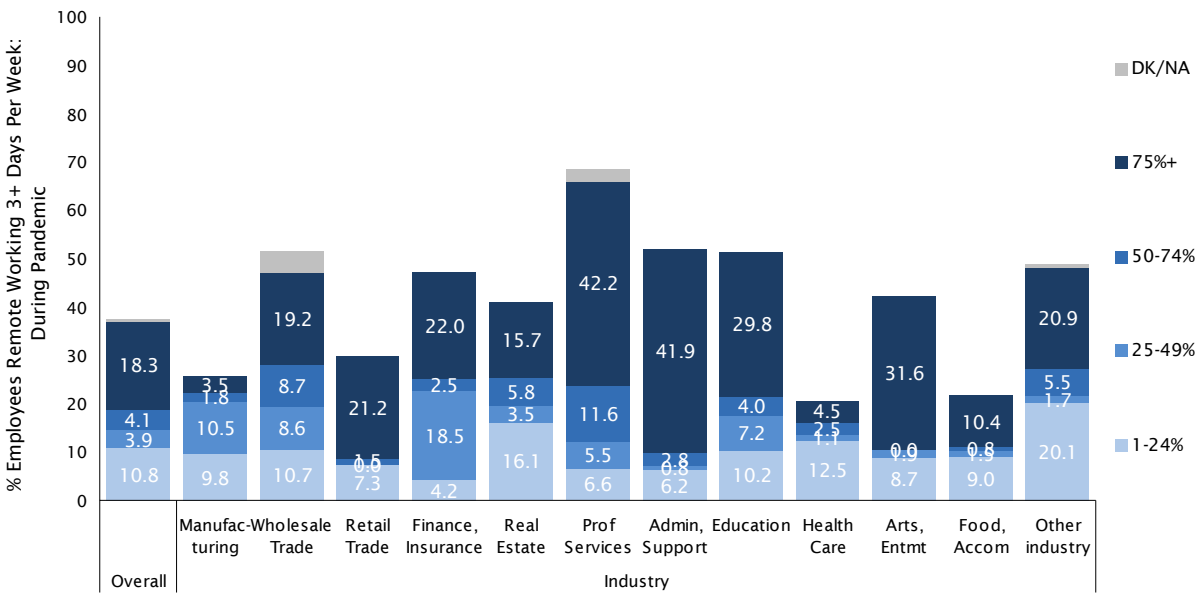


FIGURE 52 DURING PANDEMIC: PERCENTAGE OF EMPLOYEES THAT WORK FROM HOME AT LEAST 3 DAYS PER WEEK BY NUMBER OF EMPLOYEES AT LOCATION & TIER 1 EMPLOYMENT CENTER

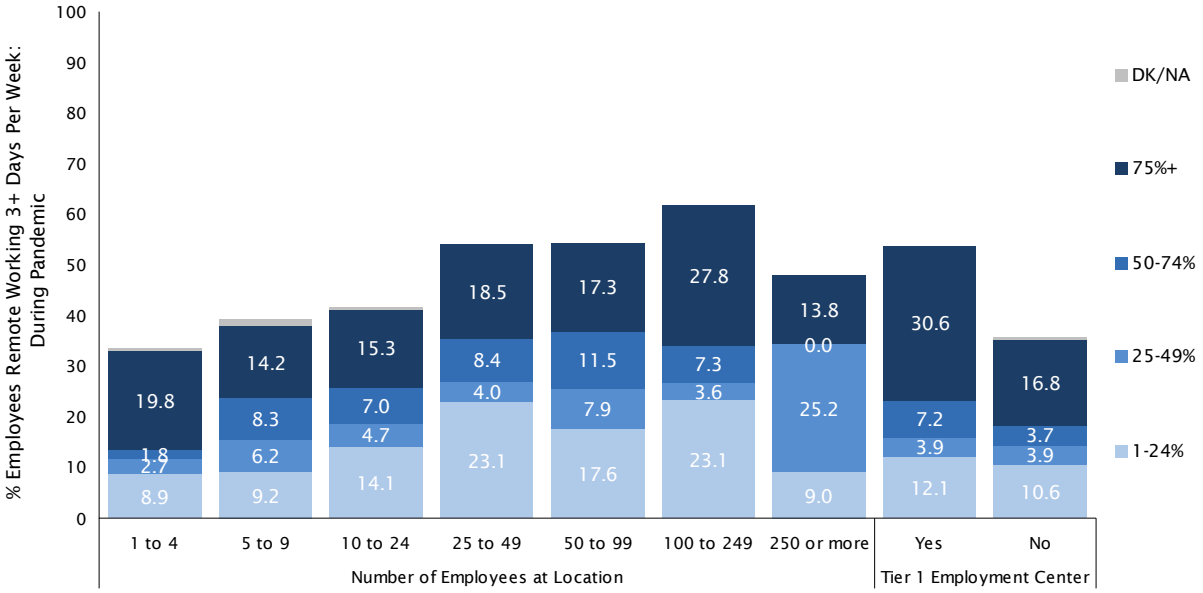
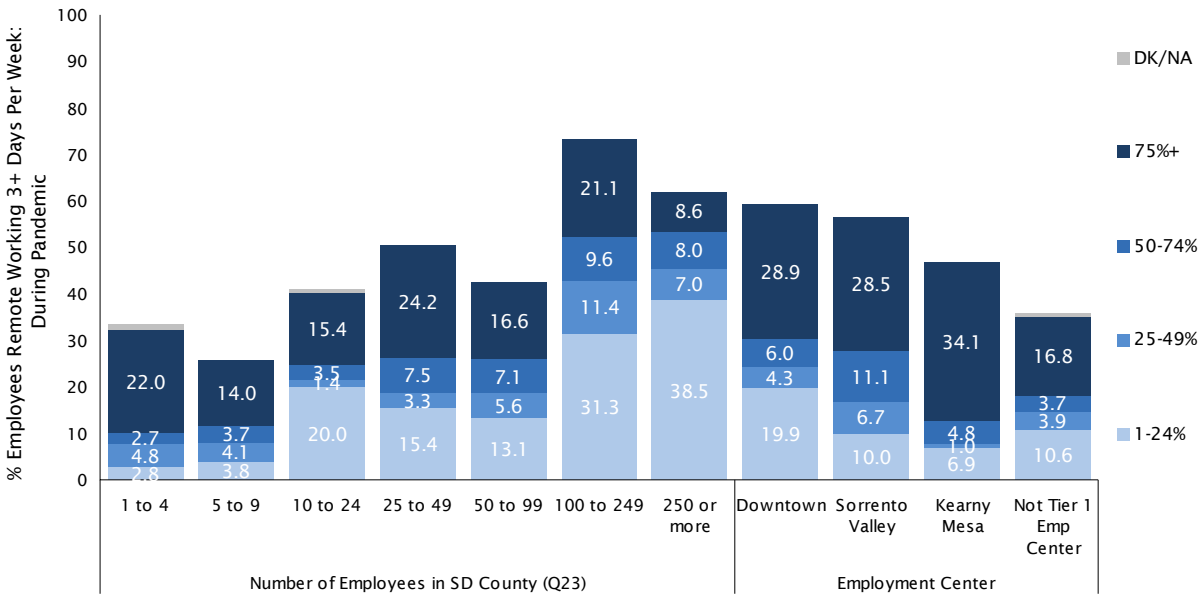


FIGURE 53 DURING PANDEMIC: PERCENTAGE OF EMPLOYEES THAT WORK FROM HOME AT LEAST 3 DAYS PER WEEK BY NUMBER OF EMPLOYEES IN SD COUNTY & EMPLOYMENT CENTER



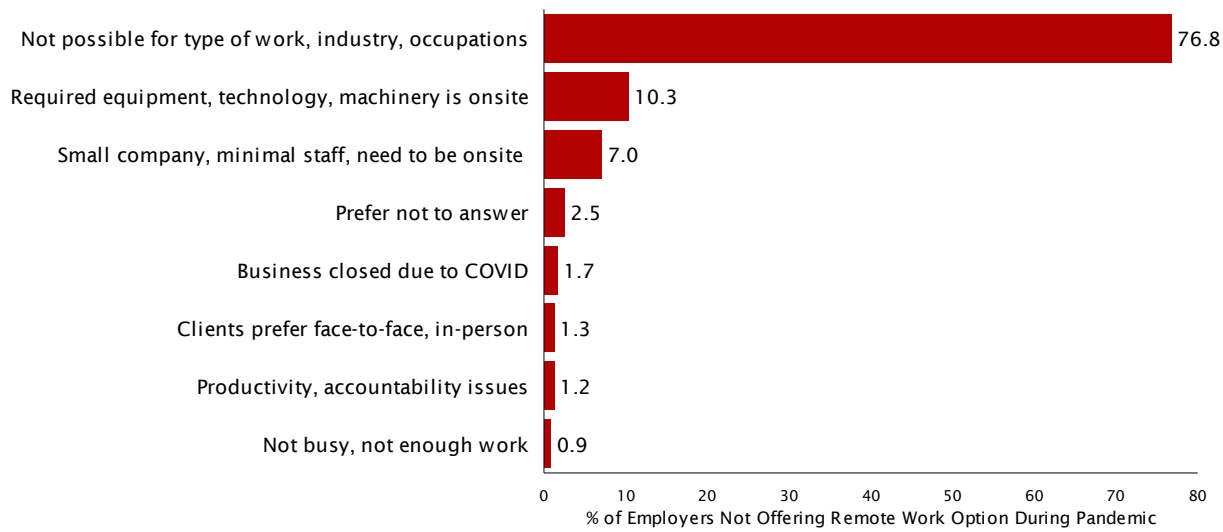
Businesses: Barriers to Remote Work During Pandemic

Just over half of all businesses surveyed in the San Diego region (53%) in 2021 indicated that, despite the pandemic, they did not offer a remote work option to employees. For businesses that fit this profile, Question 9 asked them to describe the main reason employees were not allowed to work from home at least one day per week.

By far the most common reason offered for not allowing employees to work remotely was that it was not possible for the type of work required, their industry, and/or the occupations they employ (mentioned by 77% of respondents). An additional 10% indicated that specialized equipment, technology or machinery was only available onsite, and 7% mentioned the small size of the company, minimal staff, and a need for staff to be onsite as their reason for not allowing employees to work from home (Figure 54).

2021 Survey, Question 9 *What would you say is the main reason why employees are not allowed to work from home at least one day per week?*

Figure 54 During Pandemic: Reasons For Not Allowing Employees to Work From Home at Least 1 Day Per Week



Businesses: Impacts of Remote Work During Pandemic

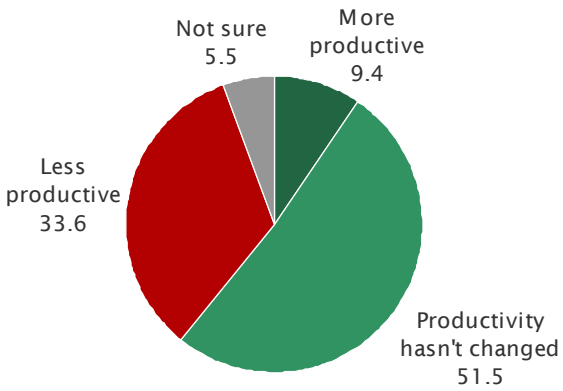
Businesses that offered employees the option to work from home during the pandemic period were next asked to describe their experiences with remote work arrangements—including the biggest challenges, biggest benefits, and the impacts of remote work on various dimensions ranging from profitability and expenses to teamwork, communication, and employee morale.

Impact of Remote Work on Productivity

The first question in this series was targeted to businesses that reported an *increase* in the percentage of their employees working from home during the pandemic. When asked in 2021 how having more of their workforce working from home has impacted the company's productivity, approximately half (52%) indicated that productivity hadn't changed and an additional 6% were unsure. Among those who perceived an impact from more employees working at home, the percentage who felt their company was less productive (34%) was nearly four times as large as the percentage who felt the change made their company more productive (9%).

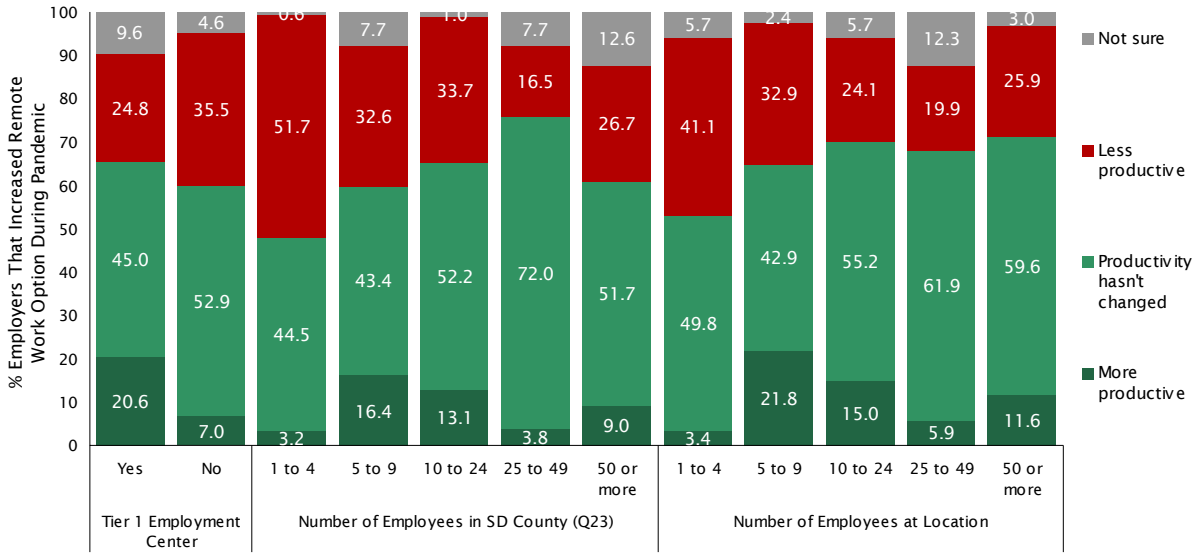
2021 Survey, Question 11 *You indicated that the percentage of employees who are working from home at least one day per week has increased during the past year. With a higher percentage of employees working from home, would you say overall your company is more productive, less productive, or has it not changed your productivity?*

Figure 55 During Pandemic: Company's Productivity Due to Employees Working From Home



When compared to their respective counterparts, companies not located in a Tier 1 Employment Center and smaller companies (less than five employees at their location; less than five employees in the San Diego region) were the most likely in 2021 to report a loss in productivity associated with having more of their workforce working remotely during the pandemic (see Figure 56).

FIGURE 56 DURING PANDEMIC: COMPANY'S PRODUCTIVITY DUE TO EMPLOYEES WORKING FROM HOME BY TIER 1 EMPLOYMENT CENTER, NUMBER OF EMPLOYEES IN SD COUNTY & NUMBER OF EMPLOYEES AT LOCATION



BIGGEST CHALLENGES & BENEFITS TO REMOTE WORK

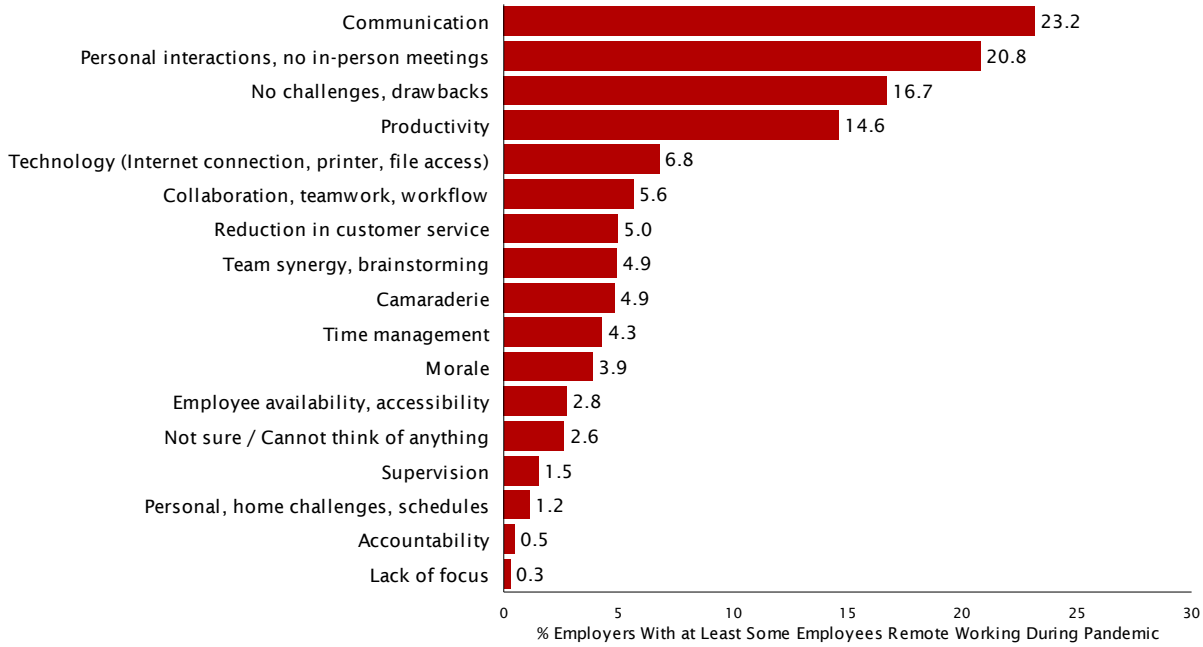
All businesses that had at least one employee working remotely in 2021 were asked in the baseline survey to describe the biggest challenges or drawbacks for their business associated with employees working from home (Question 12), as well as the biggest benefits (Question 13). Both questions were administered in an open-ended manner, which allowed respondents to mention any item that came to mind without being prompted by, or restricted to, a particular list of options. True North later reviewed the verbatim responses and grouped them into the categories shown in Figure 57 (challenges) and Figure 58 (benefits).

Among the challenges or drawbacks to having employees working from home, businesses most frequently cited issues related to communication (23%), personal interactions/lack of in-person meetings (21%), productivity (15%), technology (7%), and collaboration/teamwork/workflow (6%) in 2021. It's worth noting that when asked to describe the drawbacks or challenges associated with remote work arrangements, nearly one-in-five businesses (17%) stated they perceived no drawbacks or challenges.

When asked in 2021 to describe the biggest benefits to remote work arrangements, one-quarter of businesses (24%) experienced an increase in productivity or efficiency, while others mentioned flexibility (16%), improved health/safety of employees (14%), reduced expenses/ overhead (11%), less commuting/travel (10%), and improved employee satisfaction (8%). When prompted to describe the benefits of remote work to their business, approximately 16% of businesses stated flatly that having employees working from home offered no benefits to their business.

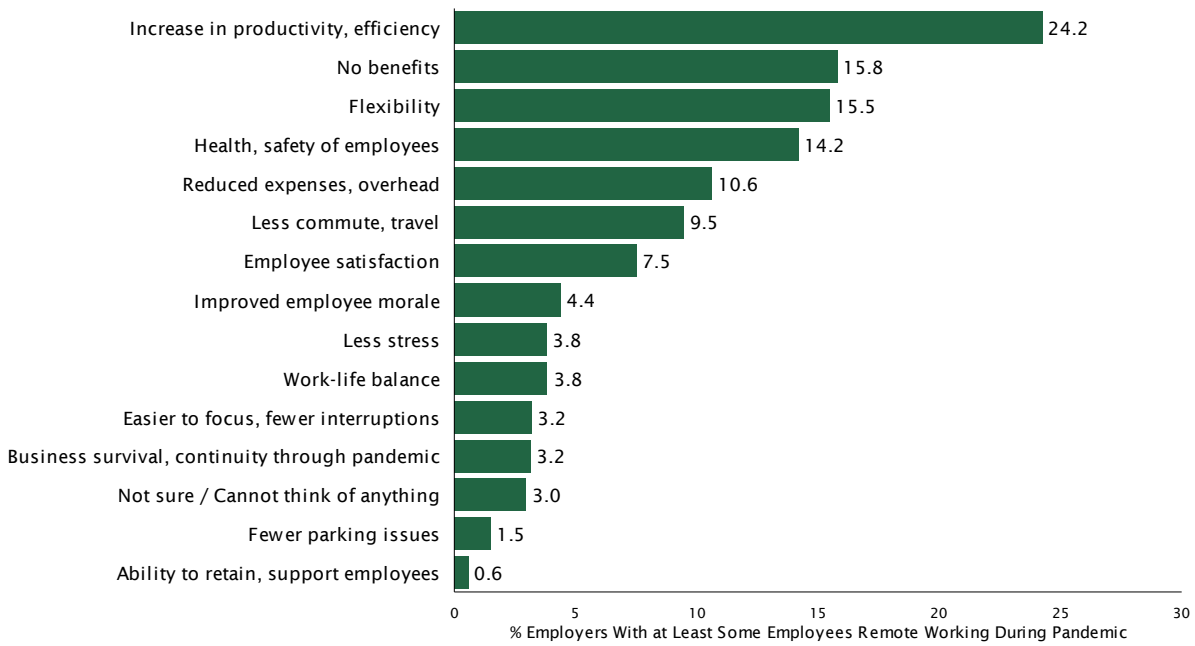
2021 Survey, Question 12 *What would you say is the biggest challenge or drawback for your business that comes from employees working from home?*

FIGURE 57 DURING PANDEMIC: BIGGEST CHALLENGE, DRAWBACK FOR BUSINESS DUE TO EMPLOYEES WORKING FROM HOME



2021 Survey, Question 13 *What would you say is the biggest benefit for your business that comes from employees working from home?*

FIGURE 58 DURING PANDEMIC: BIGGEST BENEFIT TO BUSINESS FROM EMPLOYEES WORKING FROM HOME

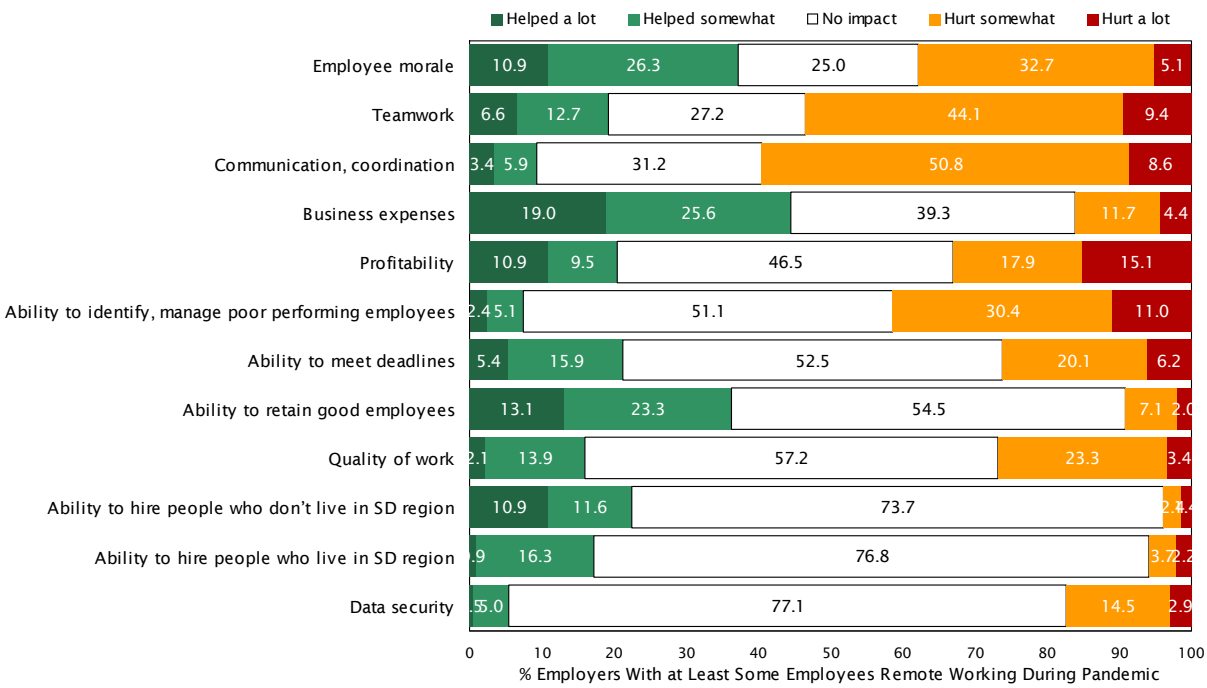


IMPACT OF REMOTE WORK ON BUSINESS ASPECTS Having captured the most salient challenges and benefits of remote work arrangements for businesses in an open-ended manner (see prior section), the baseline survey next presented respondents with the list of items shown on the left of Figure 59 and simply asked whether having more employees working from home had helped, hurt, or had no impact on this dimension of their business. Although the items were asked in a random order to avoid a systematic position bias, they are sorted in Figure 59 from high to low based on the percentage who indicated the dimension had been impacted (helped or hurt).

In 2021, businesses reported that employee morale, teamwork, and communication/ coordination were the three dimensions most impacted by having employees working at home, followed by business expenses, profitability, and the ability to identify and manage poor performing employees. At the other end of the spectrum, less than one-third of business indicated that remote working arrangements had impacted data security, their ability to hire people who live in the San Diego region, and their ability to hire people who don't currently live in the San Diego region.

2021 Survey, Question 14 *Next are a few questions about how remote work has impacted certain aspects of your business. In general, do you find that employees working from home has helped, had no impact, or hurt: _____?*

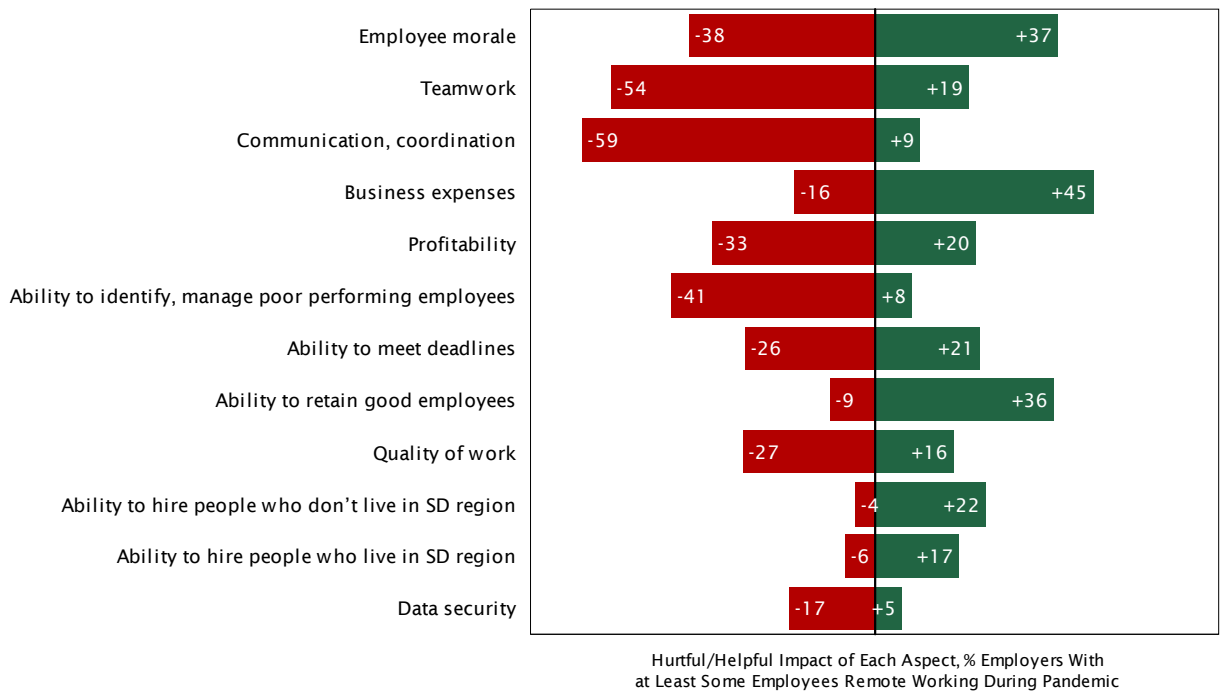
FIGURE 59 DURING PANDEMIC: IMPACT OF EMPLOYEES WORKING FROM HOME



For every dimension tested in 2021, some respondents felt that remote work arrangements helped their business, while others perceived they hurt their business. Figure 60 on the next page displays the findings of Question 14 in a format that makes it easier to identify dimensions for which the *net* impact across all businesses was generally hurtful or helpful. For two-thirds of the dimensions tested, more businesses perceived that remote working arrangements were

hurtful to their business than helpful. Communication/coordination (59%), teamwork (54%), and the ability to identify and manage poor performing employees (41%) were the dimensions with the highest percentage of businesses reporting *negative* impacts associated with employees working from home, coupled with far fewer businesses reporting a positive impact. Conversely, business expenses and the ability to retain good employees had among the highest percentages identifying remote work as being helpful (45% and 36%, respectively), coupled with far fewer businesses reporting a hurtful impact on that dimension. Dimensions that were more evenly split in terms of perceived helpful and hurtful impacts were employee morale (38%:37%) and the ability to meet deadlines (26%:21%).

FIGURE 60 DURING PANDEMIC: PERCENTAGE OF BUSINESSES CITING HURTFUL/HELPFUL IMPACT OF EMPLOYEES WORKING FROM HOME



ACTIONS TAKEN TO ACCOMMODATE REMOTE WORK Businesses that reported having remote work arrangements during the pandemic were subsequently asked to identify actions their business may have taken to accommodate employees working from home (or problems experienced). As shown in Figure 61 on the next page, more than half of businesses surveyed in 2021 indicated that they had improved communications hardware or software (55%) and purchased technology for employees to keep at home (55%), while at least one-third of businesses had expanded their online presence (40%) and changed their data security processes (34%). Approximately one-in-five businesses in the San Diego region indicated that they had reduced their building square footage or had plans to do so (19%), and/or had terminated building leases or had plans to do so (19%). Nearly four-in-ten businesses (39%) also reported experiencing problems due to some employees having poor Internet access at their home.

For the interested reader, Figure 62 shows how the responses to Question 15 varied according to whether the businesses had increased the percentage of their workforce working remotely during the pandemic (dark green bars) or kept it the same (light green bars).

2021 Survey, Question 15 *In response to more employees working from home, has your business: _____?*

FIGURE 61 DURING PANDEMIC: CHANGES & CHALLENGES DUE TO EMPLOYEES WORKING FROM HOME

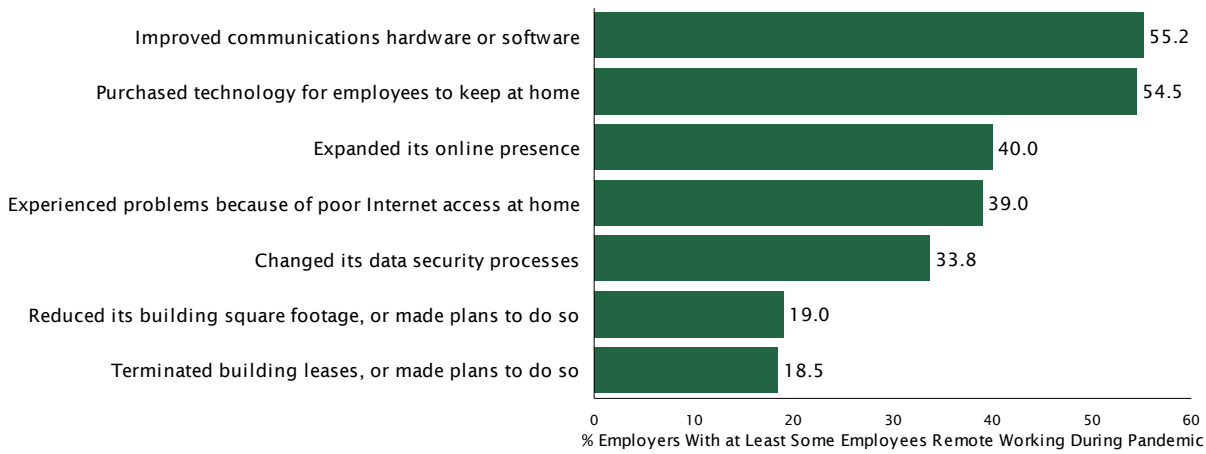
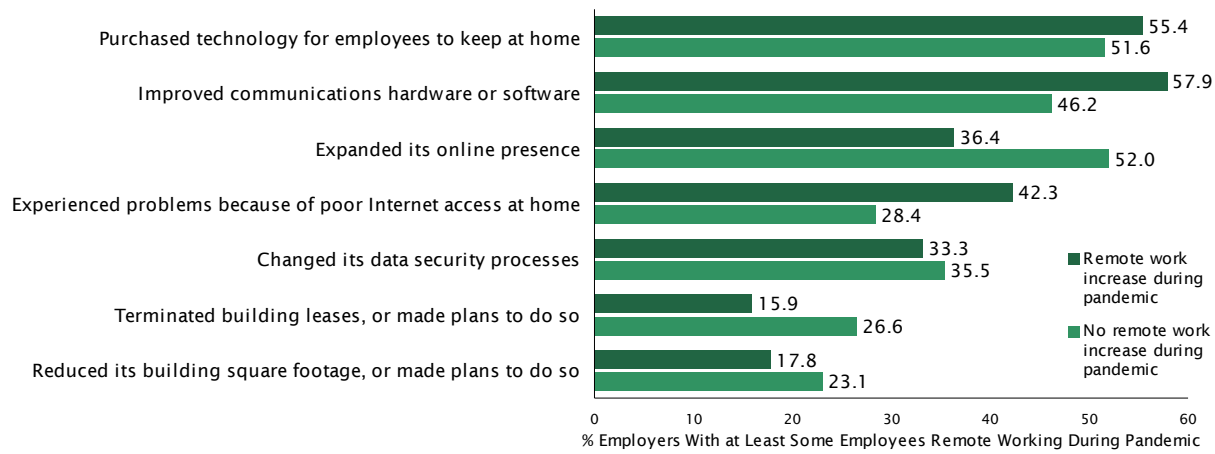


FIGURE 62 DURING PANDEMIC: CHANGES & CHALLENGES DUE TO EMPLOYEES WORKING FROM HOME BY REMOTE WORK INCREASE DURING PANDEMIC (AMONG BIZ WITH CURRENT REMOTE WORKERS)



ALLOWING EMPLOYEES TO MOVE AWAY Under a remote work model, the proximity of an employee's home relative to a central work site is less important than when that same employee has to commute to a work site. Businesses that allowed employees to work remotely during the pandemic were asked in Question 16 whether they had allowed some existing employees to move away from the San Diego region and keep their jobs by working from home (see Figure 63). Overall, 11% of businesses surveyed in 2021 indicated that they had allowed this practice, with the remainder either not allowing remote work employees to move out of the San Diego region (29%), not allowing remote work at all (58%), or unsure/unwilling to answer the question (3%). In 2021, the policy of allowing remote work employees to move out of the San

Diego region and keep their jobs was most common in administrative and support services, among businesses with a large number of employees at their location and in San Diego County, those in Tier 1 Employment Centers generally, and those in the Downtown and Sorrento Valley Employment Centers (see Figures 64-66).

Question 16 *Has your company allowed some existing employees to move away from the San Diego region and keep their jobs by working from home?*

FIGURE 63 DURING PANDEMIC: ALLOWED EMPLOYEES TO MOVE AWAY & KEEP THEIR JOB BY TELEWORKING

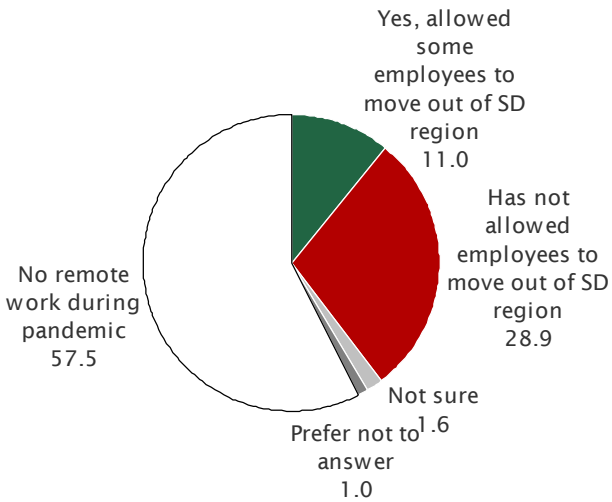


FIGURE 64 DURING PANDEMIC: ALLOWED EMPLOYEES TO MOVE AWAY & KEEP THEIR JOB BY TELEWORKING BY INDUSTRY

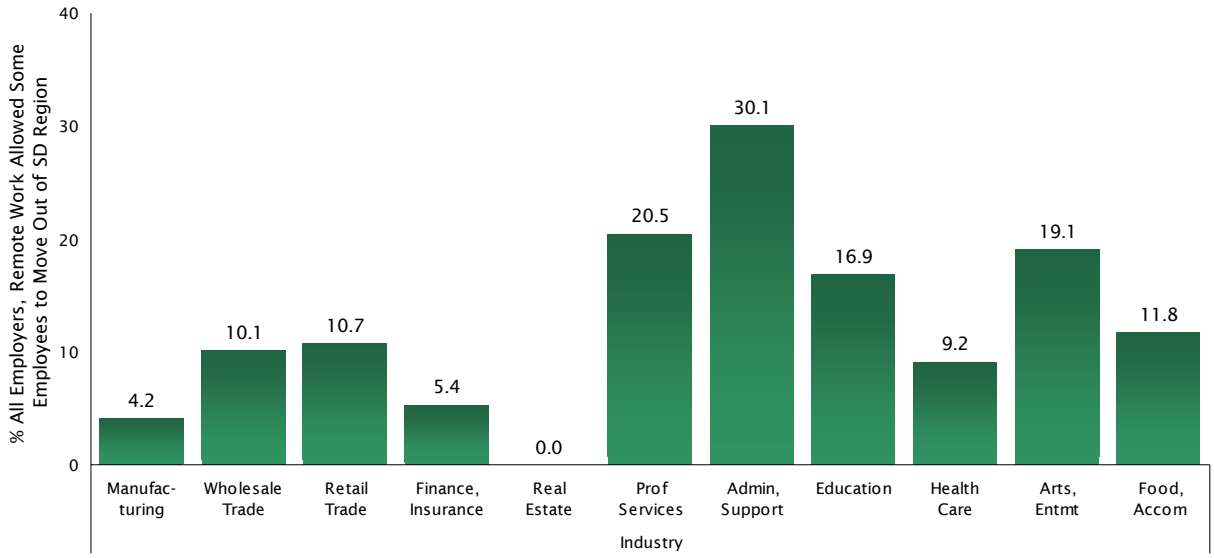


FIGURE 65 DURING PANDEMIC: ALLOWED EMPLOYEES TO MOVE AWAY & KEEP THEIR JOB BY TELEWORKING BY NUMBER OF EMPLOYEES AT LOCATION & TIER 1 EMPLOYMENT CENTER

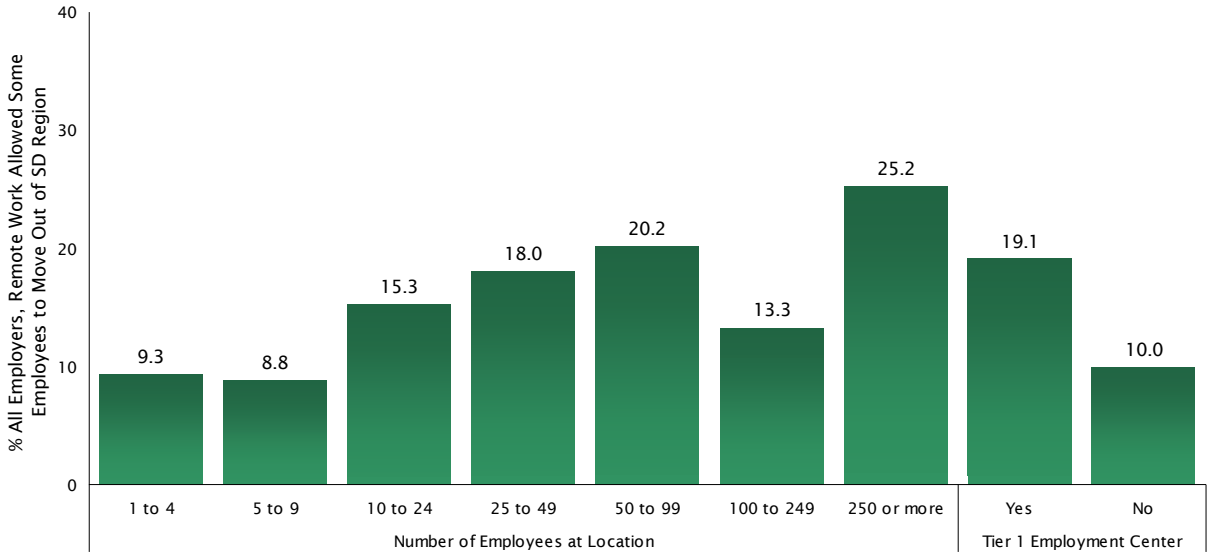
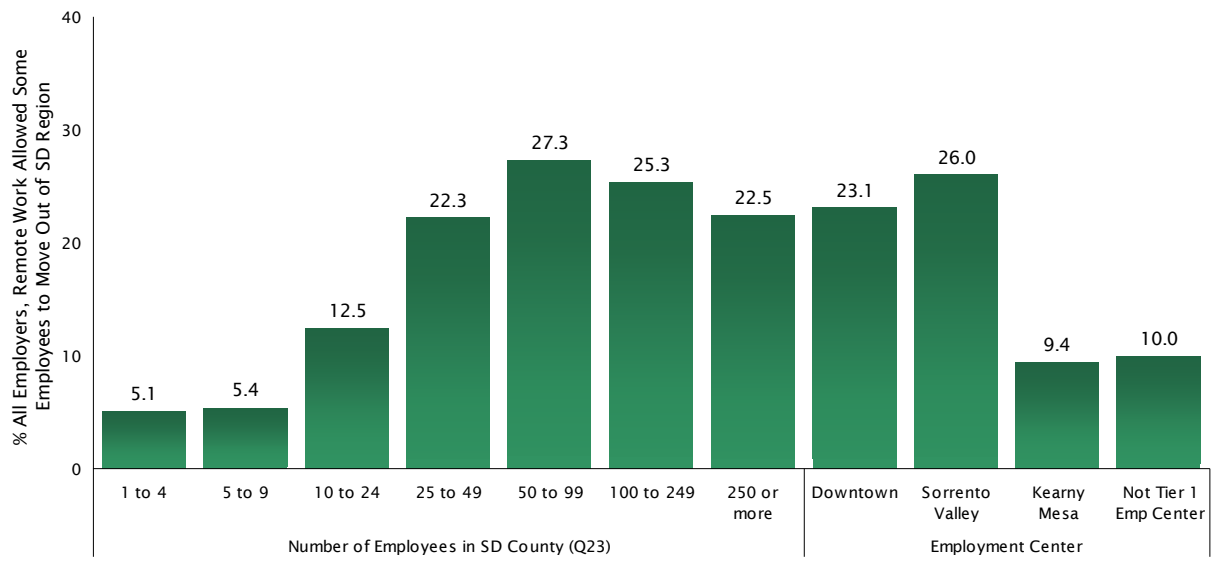


FIGURE 66 DURING PANDEMIC: ALLOWED EMPLOYEES TO MOVE AWAY & KEEP THEIR JOB BY TELEWORKING BY NUMBER OF EMPLOYEES IN SD COUNTY & EMPLOYMENT CENTER



NEW HIRE RELOCATION POLICY In addition to allowing existing employees to move away from the San Diego region and work remotely, the baseline survey inquired as to whether local businesses had hired people who live in other parts of the state or country and allowed them to remain at those locations working remotely (rather than relocate to the San Diego region). Approximately one-in-ten businesses (9%) indicated that they had hired employees outside the San Diego region to work remotely without requiring them to relocate (see Figure 67). When compared to their counterparts, this practice was noticeably more common among administrative and support services, professional services, and businesses in the Sorrento Valley Employment Center (see Figures 68-70).

2021 Survey, Question 17 *Has your company hired people who live in other parts of the State or country and allowed to stay where they are, rather than relocate to the San Diego region?*

FIGURE 67 DURING PANDEMIC: COMPANY HIRED OUT OF STATE EMPLOYEES TO WORK FROM HOME AND NOT RELOCATE TO SD

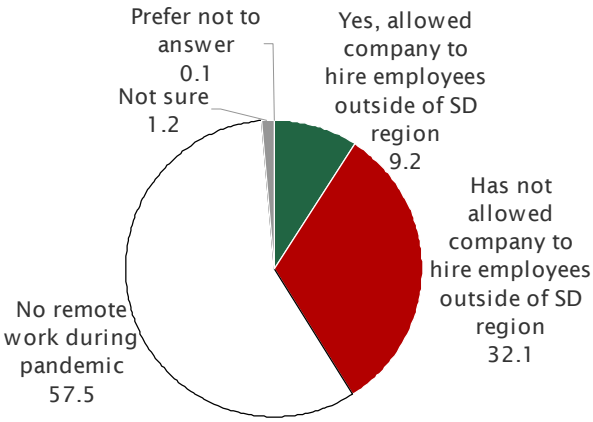


FIGURE 68 DURING PANDEMIC: COMPANY HIRED OUT OF STATE EMPLOYEES TO WORK FROM HOME AND NOT RELOCATE TO SD BY INDUSTRY

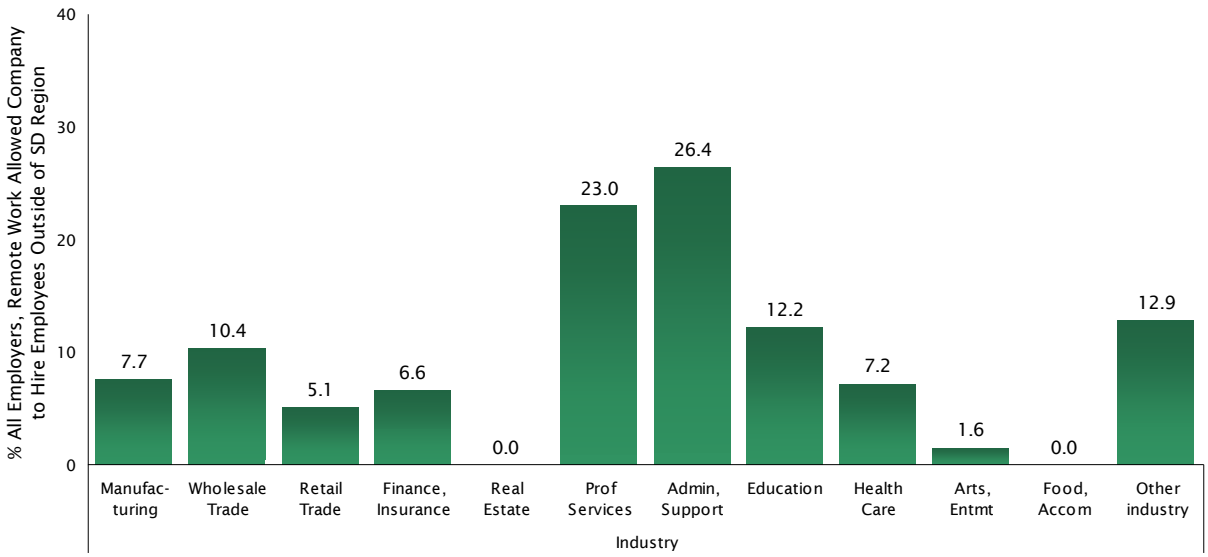


FIGURE 69 DURING PANDEMIC: COMPANY HIRED OUT OF STATE EMPLOYEES TO WORK FROM HOME AND NOT RELOCATE TO SD BY NUMBER OF EMPLOYEES AT LOCATION & TIER 1 EMPLOYMENT CENTER

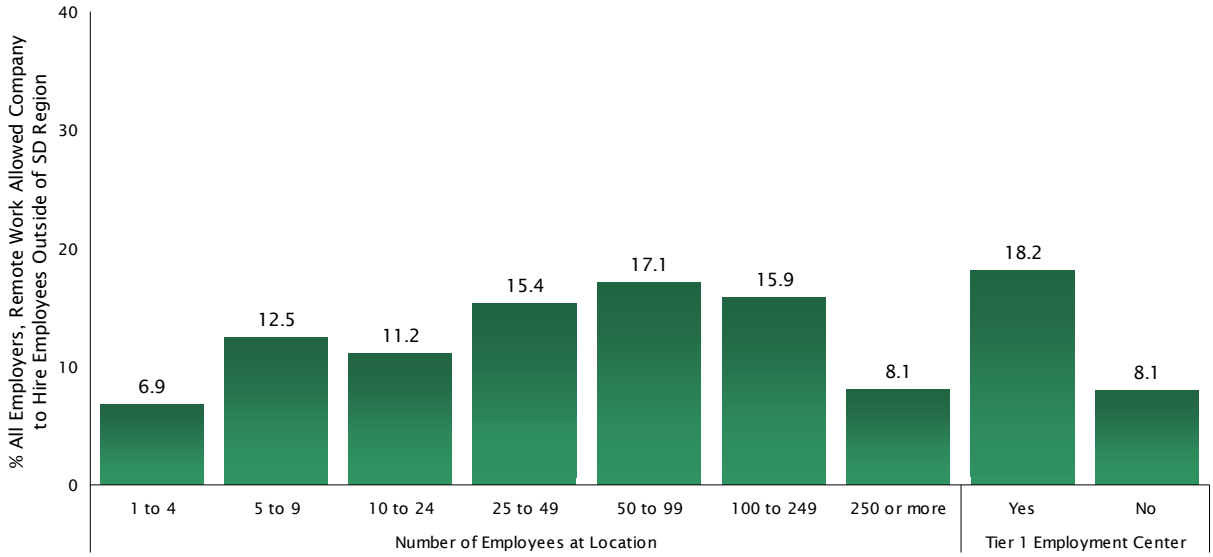
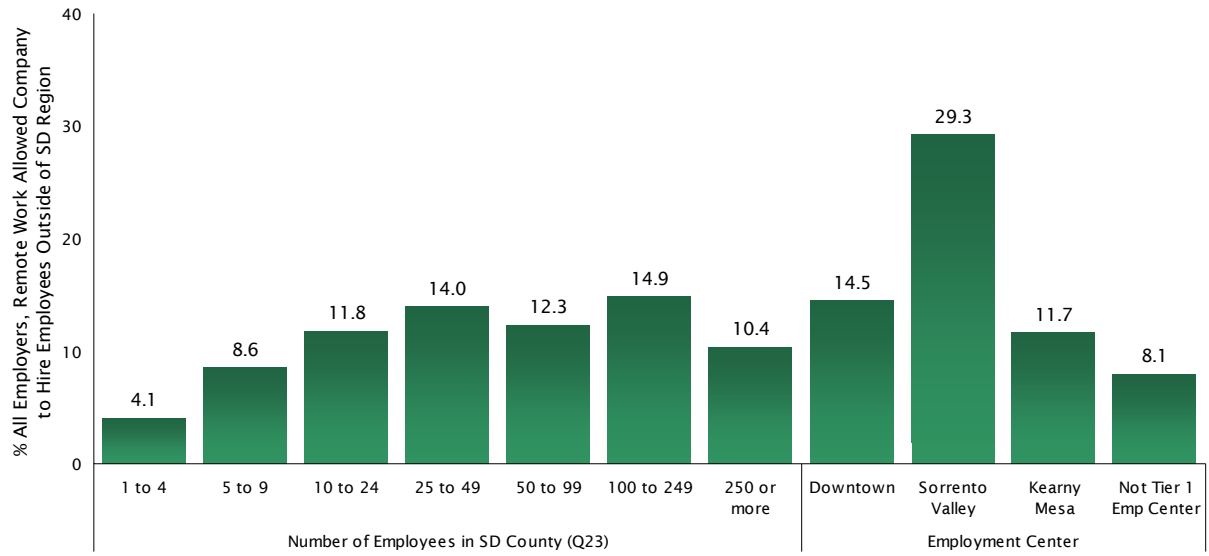


FIGURE 70 DURING PANDEMIC: COMPANY HIRED OUT OF STATE EMPLOYEES TO WORK FROM HOME AND NOT RELOCATE TO SD BY NUMBER OF EMPLOYEES IN SD COUNTY & EMPLOYMENT CENTER



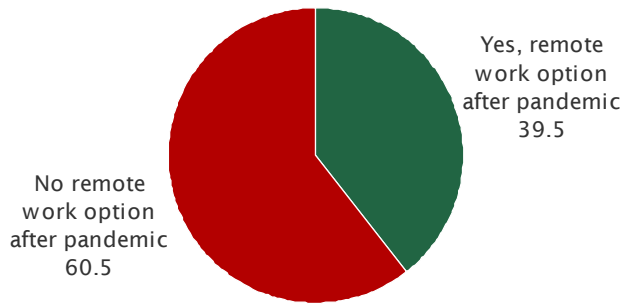
Businesses: Post-Pandemic Expectations in 2021

The final substantive section of the baseline 2021 Business Survey asked respondents to look to the future—when the pandemic is over—and relay their expectations with respect to their company's remote work policies and practices.

WILL A REMOTE WORK OPTION BE GIVEN? Nearly half of businesses surveyed (47%) indicated that during the pandemic they provided the option to work from home to at least some of their employees (see Figure 38 on page 27). When asked in 2021 about their expectations for the post-pandemic period, the percentage of businesses in the San Diego region that expected to offer a remote work option to some employees ebbed to 40% (Figure 71).

2021 Survey, Question 18 *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. Once the pandemic is over, do you expect that some employees at your company will be given the option to work from home at least one day per week?*

Figure 71 Employees Will Have an Option to Work From Home at Least 1 Day Per Week After Pandemic, Expectations in 2021



When compared to their 2021 levels (see Figures 39-41), businesses in administrative and support services, education, and real estate were the most likely to expect a significant shift back toward *not* offering a remote work option to employees, as were businesses with 50 or more employees at their location and in the County (see Figures 72-74).

Figure 72 Employees Will Have an Option to Work From Home at Least 1 Day Per Week After Pandemic, Expectations in 2021 by Industry

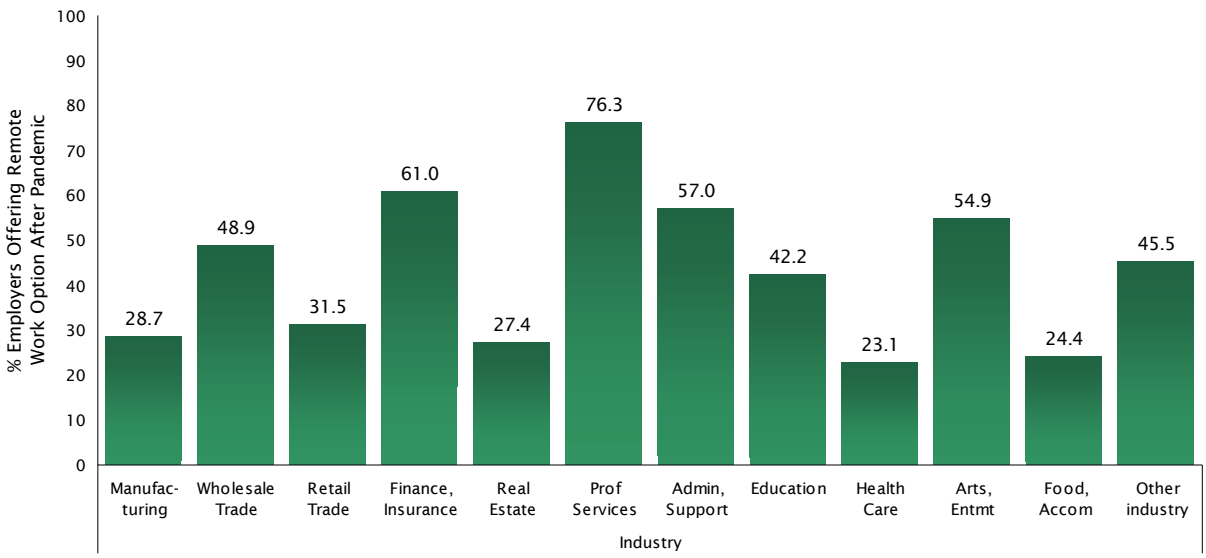


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FIGURE 73 EMPLOYEES WILL HAVE AN OPTION TO WORK FROM HOME AT LEAST 1 DAY PER WEEK AFTER PANDEMIC BY NUMBER OF EMPLOYEES AT LOCATION, TIER 1 EMPLOYMENT CENTER & REMOTE WORK OPTION BEFORE PANDEMIC

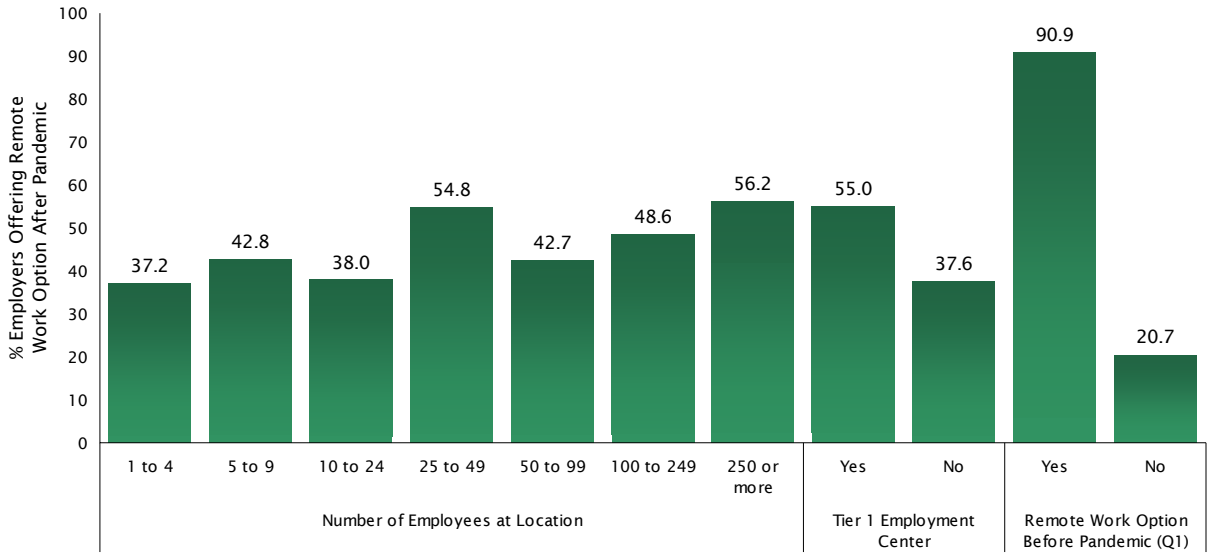
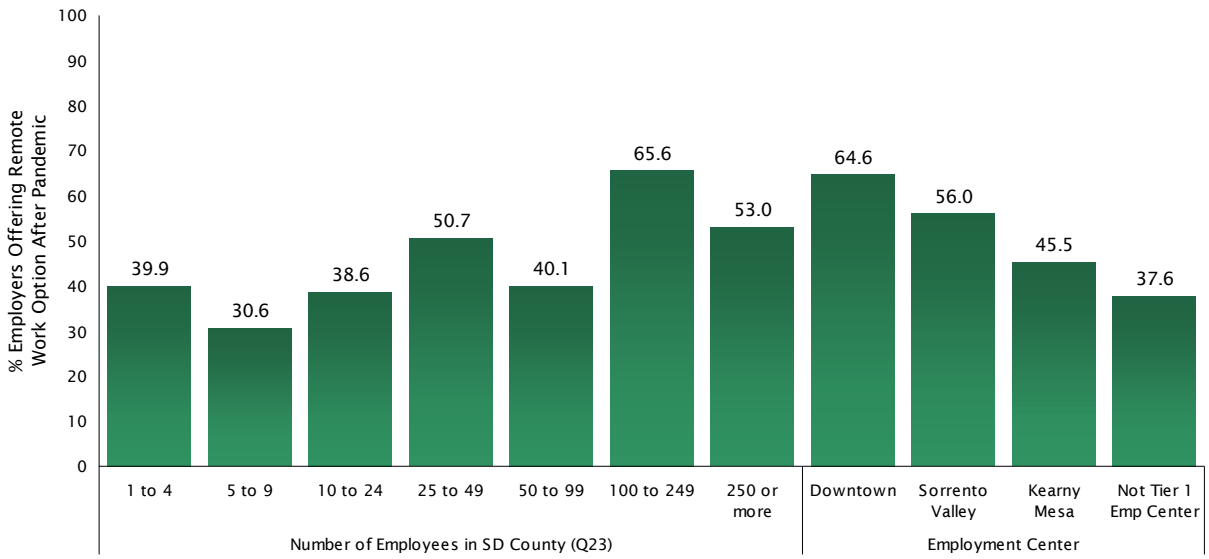


FIGURE 74 EMPLOYEES WILL HAVE AN OPTION TO WORK FROM HOME AT LEAST 1 DAY PER WEEK AFTER PANDEMIC, EXPECTATIONS IN 2021 BY NUMBER OF EMPLOYEES IN SD COUNTY & EMPLOYMENT CENTER

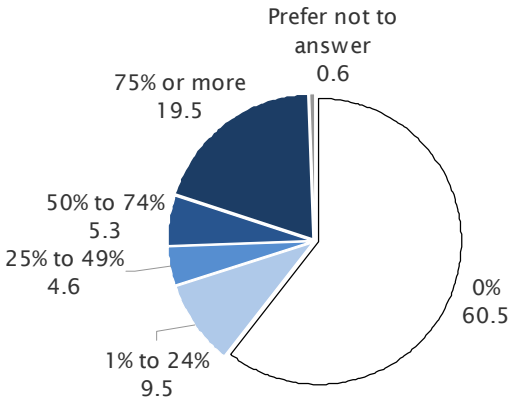


PERCENTAGE OF EMPLOYEES EXPECTED WITH REMOTE WORK OPTION

Businesses that indicated in 2021 they expected to offer some employees the option to work remotely at least one day per week during the post-pandemic period were subsequently asked to estimate the percentage of their company's employees that will be given the option to work remotely. Sixty-one percent (61%) of San Diego businesses indicated they did *not* expect to offer a remote work option, while the remainder were split between those who expected to offer it to less than one-quarter of employees (10%), 25% to 49% of their workforce (5%), 50% to 74% of employees (5%), and three-quarters or more of their workforce (20%). Overall, the percentage of businesses that expected to provide a remote work option to at least three-quarters of their employees during the post-pandemic period was 7% lower than the pandemic level of 27%, but 6% higher than pre-pandemic levels.

2021 Survey, Question 19 *After the pandemic is over, approximately what percentage of your company's employees do you expect will have the option to work from home at least one day per week?*

FIGURE 75 PERCENTAGE OF EMPLOYEES WHO WILL HAVE AN OPTION TO WORK FROM HOME AT LEAST 1 DAY PER WEEK AFTER PANDEMIC, EXPECTATIONS IN 2021



Although some businesses in all categories (industry, size, location) reported in 2021 that they expected fewer employees to be provided the option to work remotely after the pandemic is over, the largest anticipated retractions in businesses offering remote work to 75% or more of their employees were found among those in education and manufacturing, those with 50 or more employees at their location, and businesses in Tier 1 Employment Centers (compare Figures 43-45 with Figures 76-78).

FIGURE 76 PERCENTAGE OF EMPLOYEES WHO WILL HAVE AN OPTION TO WORK FROM HOME AT LEAST 1 DAY PER WEEK AFTER PANDEMIC, EXPECTATIONS IN 2021 BY OVERALL & INDUSTRY

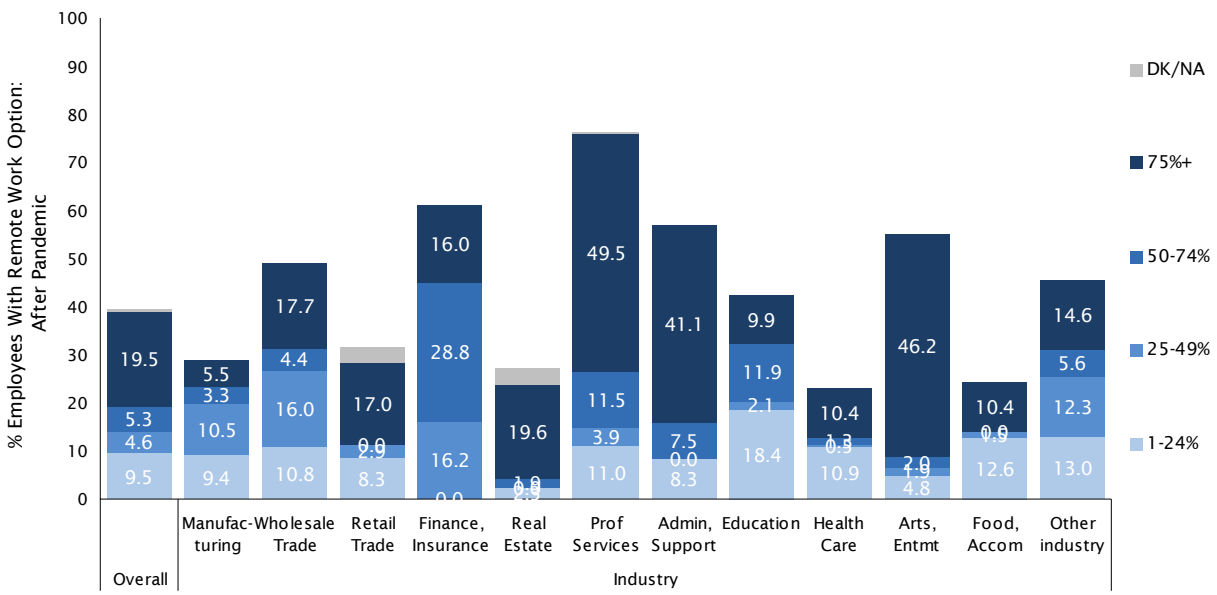


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FIGURE 77 PERCENTAGE OF EMPLOYEES WHO WILL HAVE AN OPTION TO WORK FROM HOME AT LEAST 1 DAY PER WEEK AFTER PANDEMIC, EXPECTATIONS IN 2021 BY NUMBER OF EMPLOYEES AT LOCATION & TIER 1 EMPLOYMENT CENTER

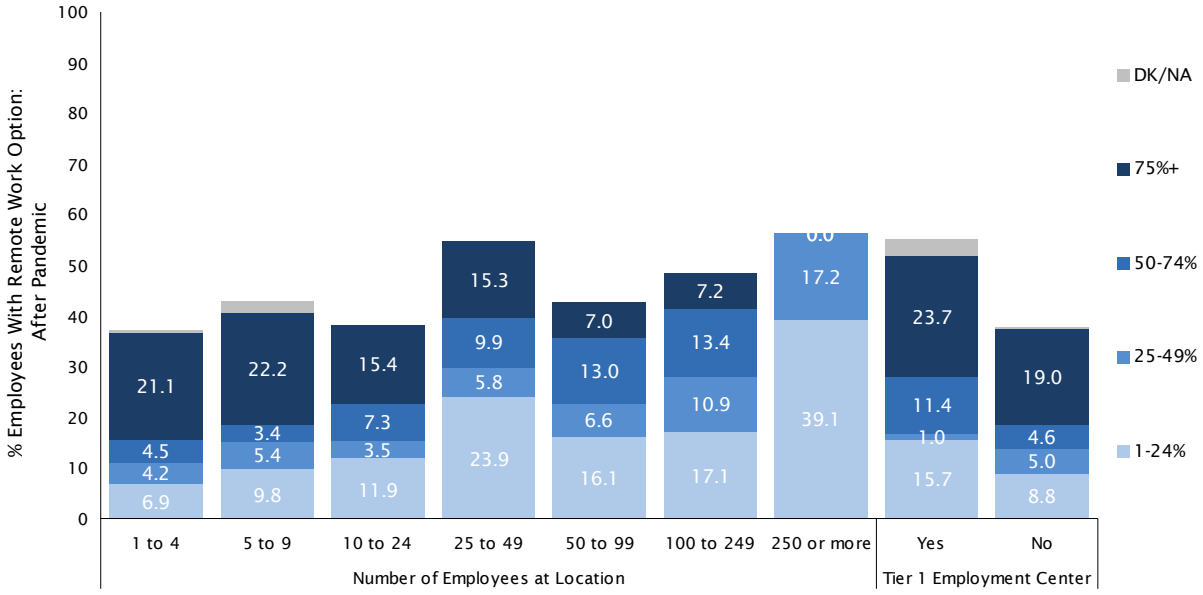
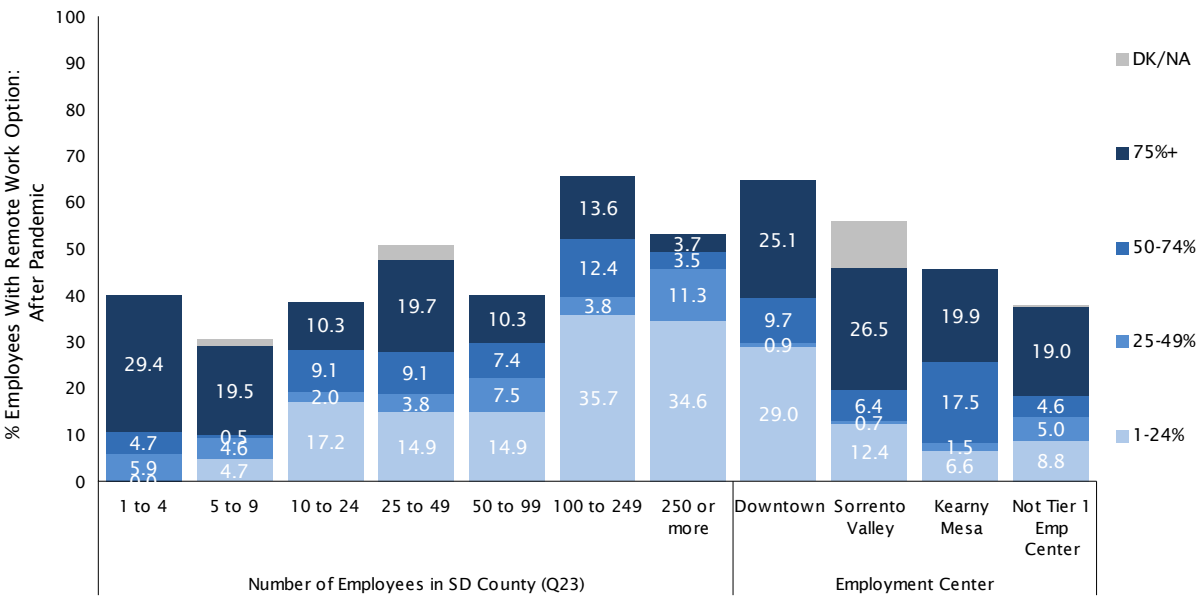


FIGURE 78 PERCENTAGE OF EMPLOYEES WHO WILL HAVE AN OPTION TO WORK FROM HOME AT LEAST 1 DAY PER WEEK AFTER PANDEMIC, EXPECTATIONS IN 2021 BY NUMBER OF EMPLOYEES IN SD COUNTY & EMPLOYMENT CENTER



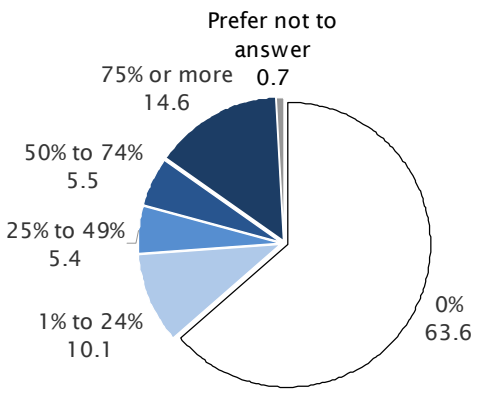
PERCENTAGE OF EMPLOYEES TO WORK REMOTELY 1+ DAYS PER WEEK

Although 39% of businesses indicated in 2021 they expected to offer a remote work option to some employees post-pandemic, the percentage that expected to have one or more employees working from home at least one day per week after the pandemic (Figure 79) was slightly lower (36%). Approximately 15% of businesses expected that 75% or more of their employees would work from home at least one day per week in the future, with the remainder divided as follows:

50% to 74% of workforce (6%), 25% to 49% of workforce (5%), and 1% to 24% of workforce (10%). When comparing pandemic patterns (see Figure 46 on page 31) with post-pandemic expectations (Figure 79), the category with the largest shift was businesses with 75% or more of their workforce working remotely one or more days per week (-7%).

2021 Survey, Question 20 *After the pandemic is over, approximately what percentage of your company's employees do you expect will actually work from home at least one day per week?*

FIGURE 79 PERCENTAGE OF EMPLOYEES EXPECTED TO WORK FROM HOME AT LEAST 1 DAY PER WEEK AFTER PANDEMIC, EXPECTATIONS IN 2021



When compared to their counterparts, businesses in professional services, administrative and support services, arts and entertainment, those with less than 50 employees at their location, and businesses located in the Downtown Employment Center were the most likely to expect that 75% or more of their workforce would be working remotely at least one day per week once the pandemic is over (Figures 80-82). It's also worth noting that when compared to pandemic patterns (see Figures 47-49), the largest reductions in businesses expecting to have 75% or more of their employees working remotely at least once per week post-pandemic were found among those in education and finance and insurance, businesses with a large number of employees at their location, and those located in Tier 1 Employment Centers (see Figures 80-82).

FIGURE 80 PERCENTAGE OF EMPLOYEES EXPECTED TO WORK FROM HOME AT LEAST 1 DAY PER WEEK AFTER PANDEMIC, EXPECTATIONS IN 2021 BY OVERALL & INDUSTRY

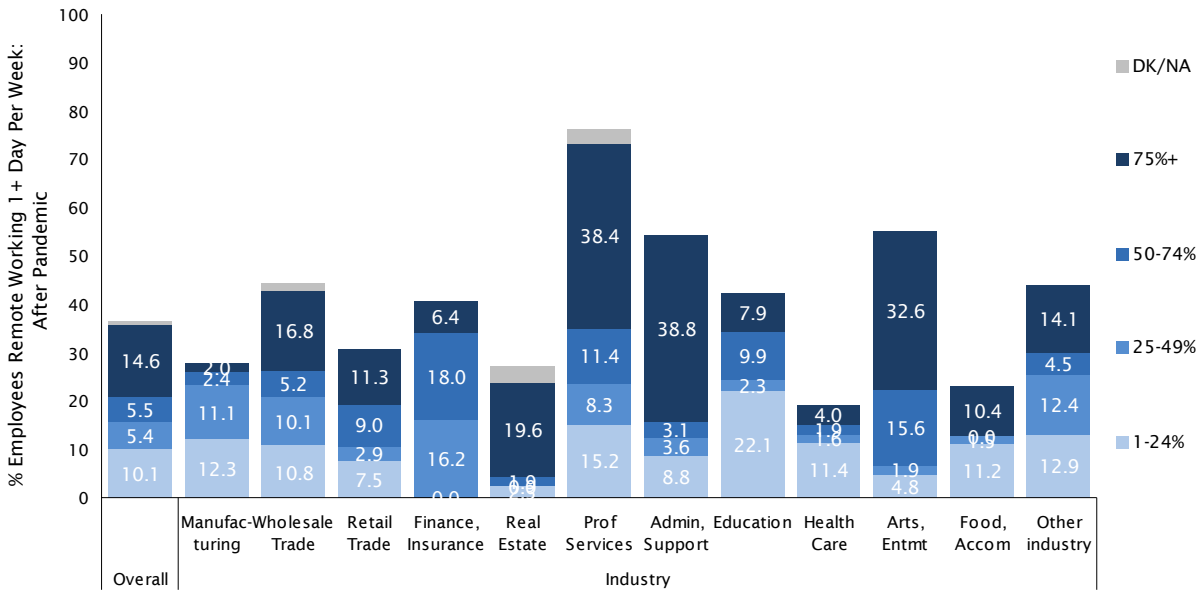


FIGURE 81 PERCENTAGE OF EMPLOYEES EXPECTED TO WORK FROM HOME AT LEAST 1 DAY PER WEEK AFTER PANDEMIC, EXPECTATIONS IN 2021 BY NUMBER OF EMPLOYEES AT LOCATION & TIER 1 EMPLOYMENT CENTER

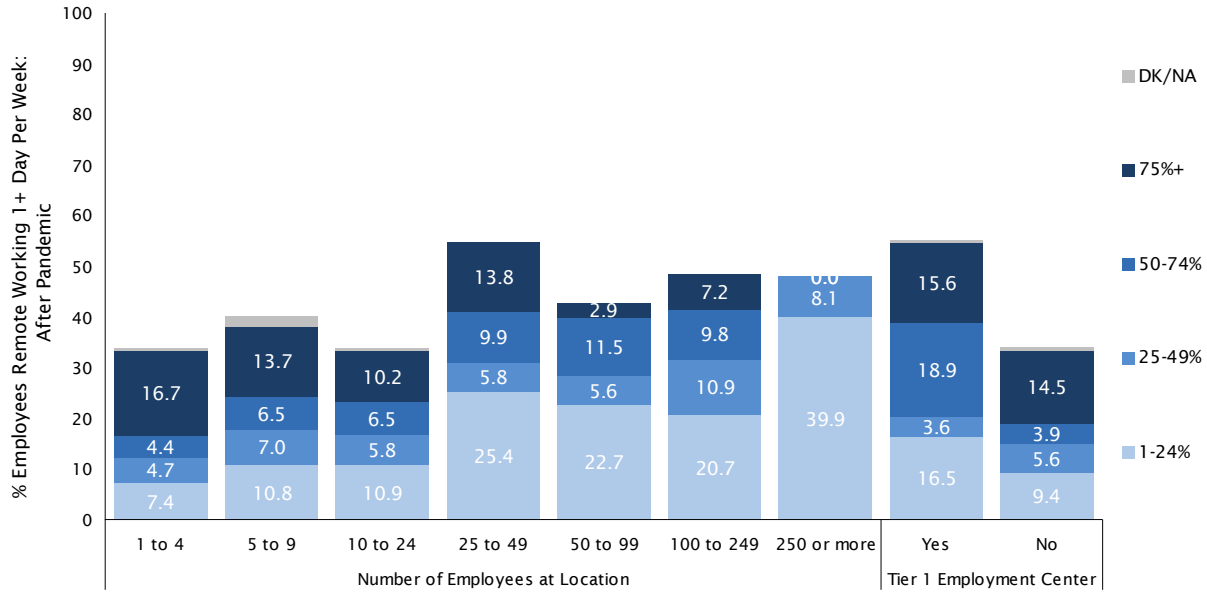
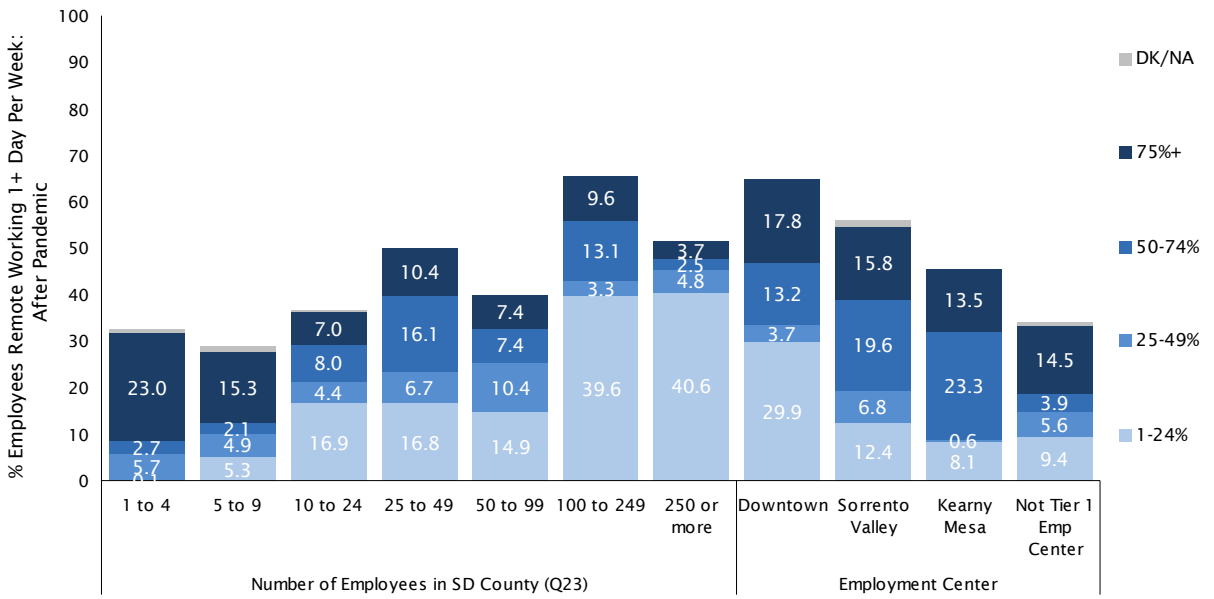


FIGURE 82 PERCENTAGE OF EMPLOYEES EXPECTED TO WORK FROM HOME AT LEAST 1 DAY PER WEEK AFTER PANDEMIC, EXPECTATIONS IN 2021 BY NUMBER OF EMPLOYEES IN SD COUNTY & EMPLOYMENT CENTER

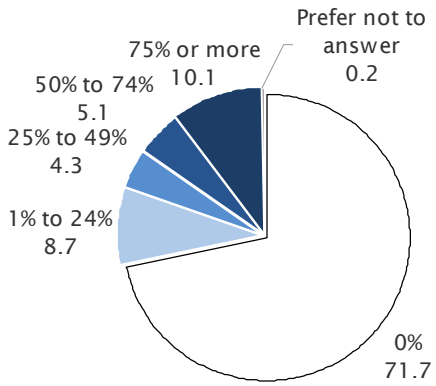


PERCENTAGE OF EMPLOYEES TO WORK REMOTELY 3+ DAYS PER WEEK

When asked in 2021, nearly three-quarters of businesses in the San Diego region (72%) expected to have no (zero) employees working from home at least three days per week during the post-pandemic period (see Figure 83). At the other end of the spectrum, 10% of businesses indicated they expected at least 75% of their workforce to work remotely most of the time once the pandemic is over. The remaining businesses were divided between those expecting 50% to 74% of their workforce (5%), 25% to 49% of their workforce (4%), and less than 25% of their workforce (9%) to work from home most of the time.

2021 Survey, Question 21 *After the pandemic is over, approximately what percentage of your company's employees do you expect will work from home most of the time - at least three days per week?*

FIGURE 83 PERCENTAGE OF EMPLOYEES EXPECTED TO WORK FROM HOME MOST OF THE TIME AFTER PANDEMIC, EXPECTATIONS IN 2021



Post-pandemic, businesses in professional services, administrative and support services, those with 50 or more employees at their location or in the County, and those located in Tier 1 Employment Centers were the most likely to report that at least *some* of their employees would be working three or more days per week from home (see Figures 84-86). That said, businesses with 50 or more employees at their location or in the County, as well as those in Tier 1 Employment Centers, *also* anticipated the largest reduction in 75% or more of their workforce to be working from home most of the time after the pandemic is over (compare Figures 51-53 with Figures 84-86).

FIGURE 84 PERCENTAGE OF EMPLOYEES EXPECTED TO WORK FROM HOME MOST OF THE TIME AFTER PANDEMIC, EXPECTATIONS IN 2021 BY OVERALL & INDUSTRY

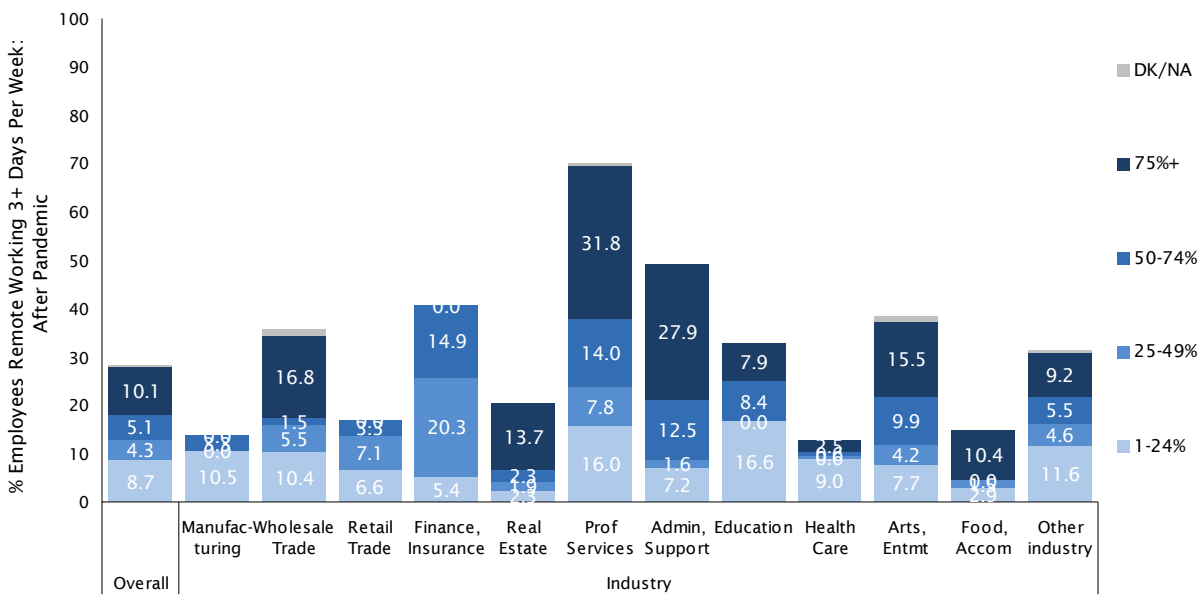


FIGURE 85 PERCENTAGE OF EMPLOYEES EXPECTED TO WORK FROM HOME MOST OF THE TIME AFTER PANDEMIC, EXPECTATIONS IN 2021 BY NUMBER OF EMPLOYEES AT LOCATION & TIER 1 EMPLOYMENT CENTER

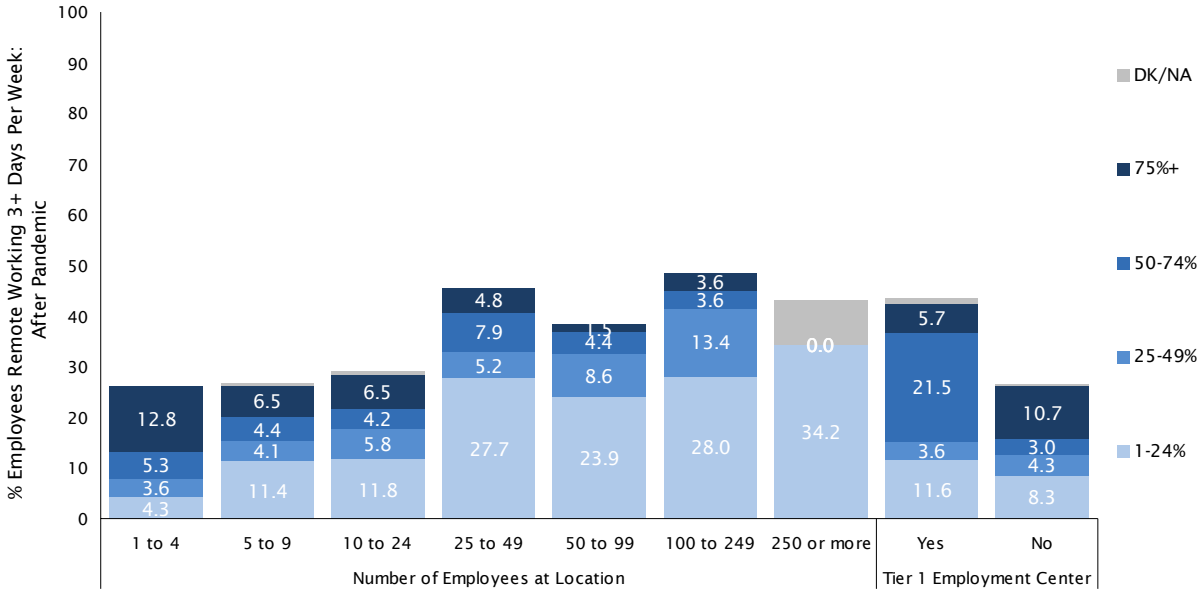
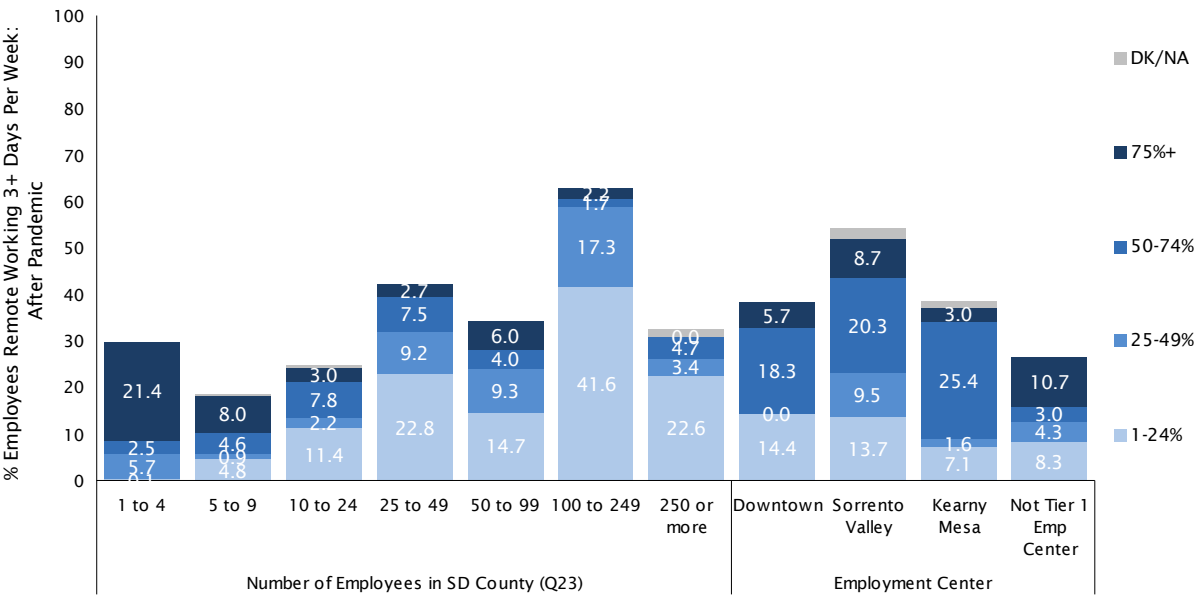


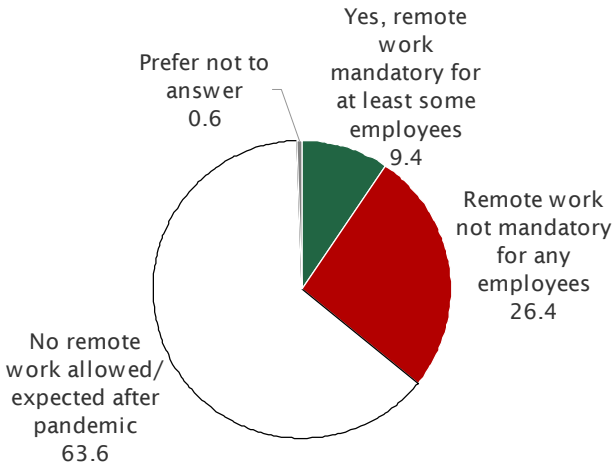
FIGURE 86 PERCENTAGE OF EMPLOYEES EXPECTED TO WORK FROM HOME MOST OF THE TIME AFTER PANDEMIC, EXPECTATIONS IN 2021 BY NUMBER OF EMPLOYEES IN SD COUNTY & EMPLOYMENT CENTER



WILL REMOTE WORK BE MANDATORY? The final substantive question of the baseline 2021 Business Survey asked employers who expected to offer a remote work option to employees after the pandemic is over whether working from home will be *mandatory* for some employees. In other words, will some employees be *required* to work from home at least some of the time? Across the region, approximately one-in-ten businesses (9%) expected that remote work would be mandatory for a portion of their workforce (see Figure 87).

2021 Survey, Question 22 *After the pandemic is over, will working from home be mandatory for any employees? In other words, will some employees be required to work from home at least some of the time?*

FIGURE 87 EMPLOYEES REQUIRED TO WORK FROM HOME AFTER PANDEMIC, EXPECTATIONS IN 2021



When compared to their respective counterparts, businesses in professional services and administrative and support services, those that offered a remote work option prior to the pandemic, those with 100 to 249 employees in the County, and businesses located in the Sorrento Valley Employment Center were the most likely in 2021 to expect that remote work would be mandatory for some employees during the post-pandemic period (Figures 88-90).

FIGURE 88 EMPLOYEES REQUIRED TO WORK FROM HOME AFTER PANDEMIC, EXPECTATIONS IN 2021 BY INDUSTRY

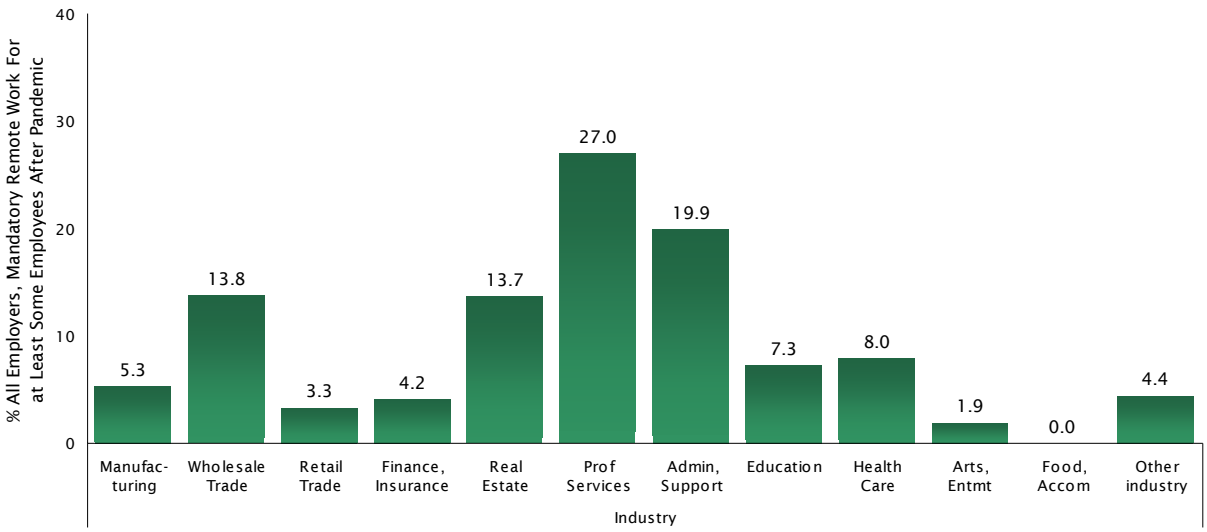


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FIGURE 89 EMPLOYEES REQUIRED TO WORK FROM HOME AFTER PANDEMIC, EXPECTATIONS IN 2021 BY NUMBER OF EMPLOYEES AT LOCATION, TIER 1 EMPLOYMENT CENTER & REMOTE WORK OPTION BEFORE PANDEMIC

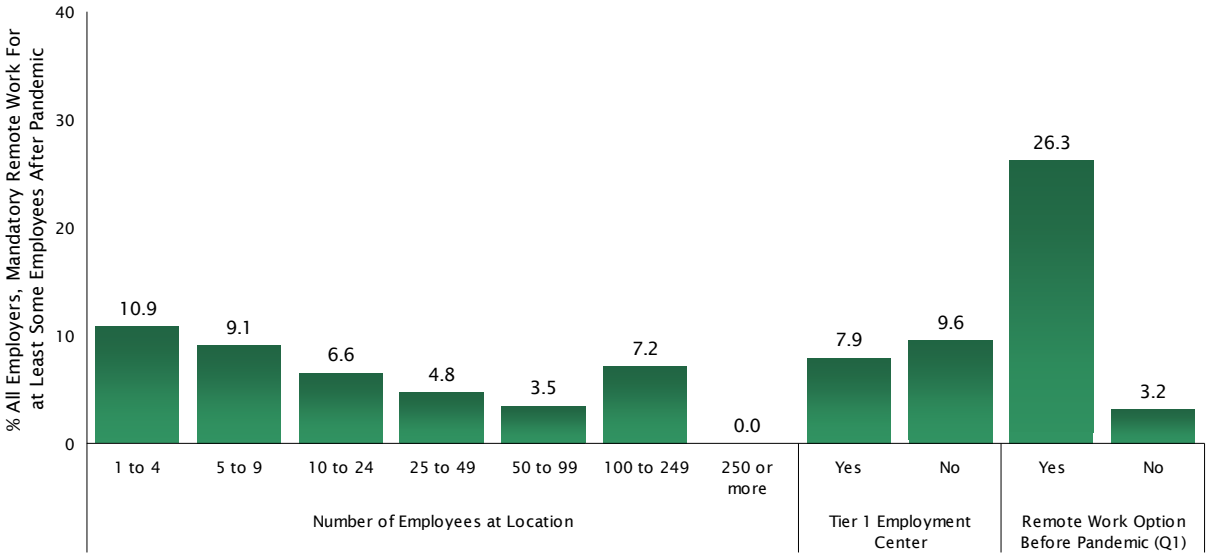
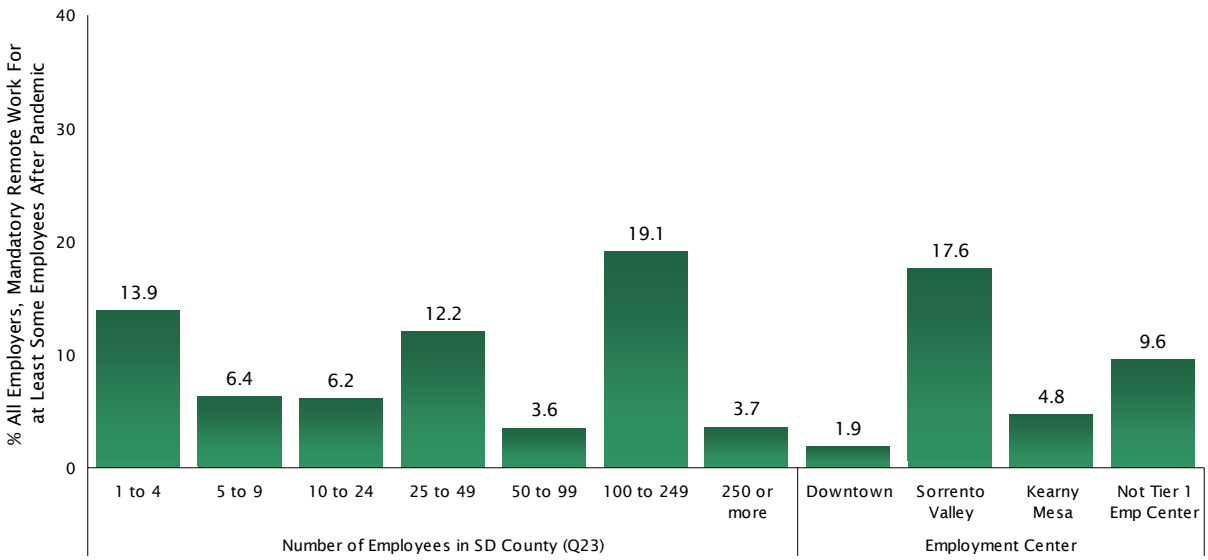


FIGURE 90 EMPLOYEES REQUIRED TO WORK FROM HOME AFTER PANDEMIC, EXPECTATIONS IN 2021 BY NUMBER OF EMPLOYEES IN SD COUNTY & EMPLOYMENT CENTER



Businesses: Post-Pandemic (2023)

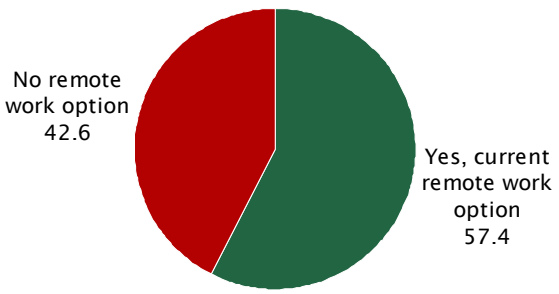
Having captured the remote work policies and practices of San Diego businesses prior to the pandemic, during the pandemic, and their post-pandemic expectations when asked in 2021, the 2023 tracking survey asked businesses these same questions for the *current* period—post-pandemic.

REMOTE WORK OPTION GIVEN

The pandemic compelled many businesses in the San Diego region to shift to a remote work model, at least for certain employees. Nearly half of businesses surveyed in 2021 (47%) indicated that they provided one ore more employees the option to work from home at least one day per week (see Figure 38 on page 27). Although the threat of COVID-19 has subsided and public health restrictions lifted, the practice of offering some employees the option to work from home at least one day per week remains widespread in the post-pandemic environment. When surveyed in 2023, 57% of businesses in San Diego County indicated that they offer one or more employees the option to work from home at least one day per week (Figure 91).

2023 Survey, Question 1 *Next, I'd like to ask about your company's current remote work practices. Currently, are some employees at your company given the option to work from home at least one day per week?*

FIGURE 91 POST-PANDEMIC (2023): OPTION TO WORK FROM HOME AT LEAST 1 DAY PER WEEK



When compared to their counterparts, businesses in the finance, insurance and professional services industries, companies with 50 or more employees at their location, those that expect to offer a remote work option in the future (2024), companies with 100 to 249 employees in San Diego County overall, and companies in Tier 1 Employment Centers were the most likely to offer a remote work option to some employees in 2023 (Figures 92-94).

FIGURE 92 POST-PANDEMIC (2023): OPTION TO WORK FROM HOME AT LEAST 1 DAY PER WEEK BY INDUSTRY

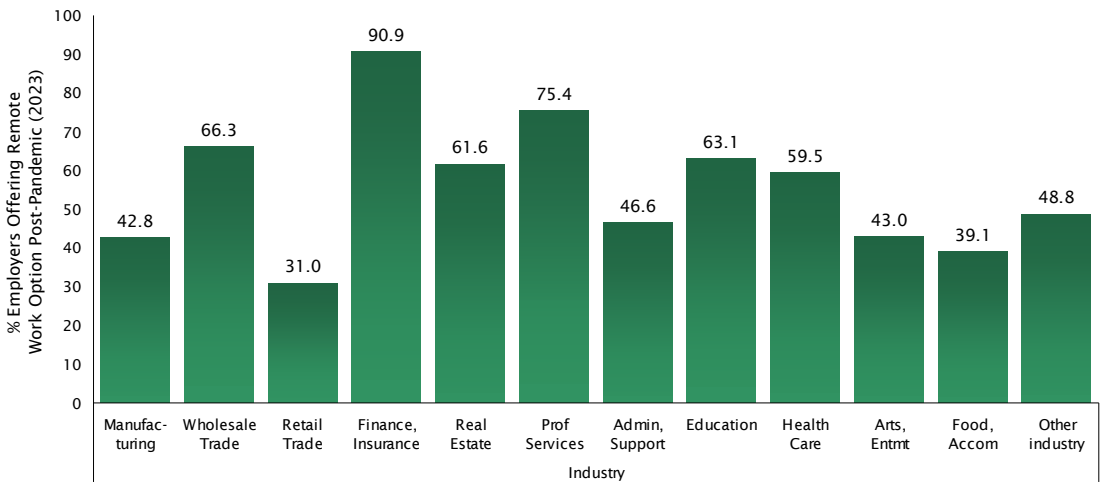


FIGURE 93 POST-PANDEMIC (2023): OPTION TO WORK FROM HOME AT LEAST 1 DAY PER WEEK BY NUMBER OF EMPLOYEES AT LOCATION, TIER 1 EMPLOYMENT CENTER & FUTURE REMOTE WORK OPTION[13]

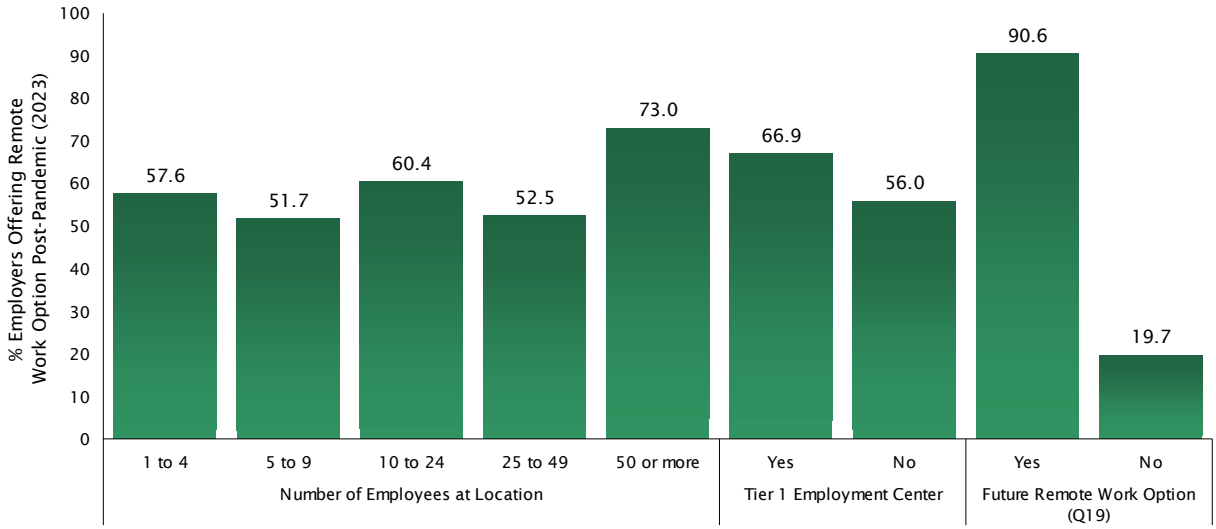
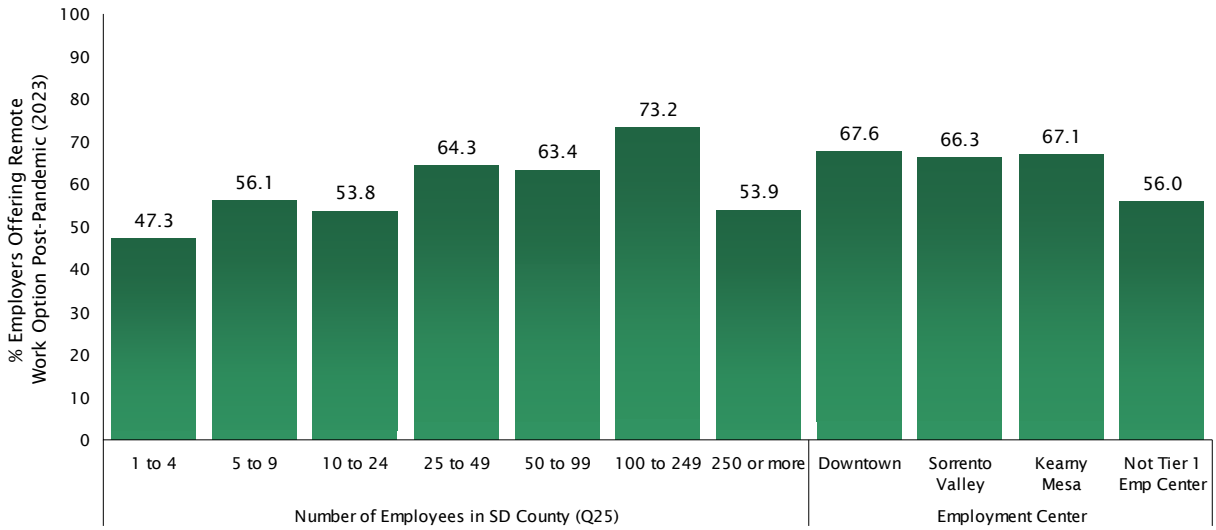


FIGURE 94 POST-PANDEMIC (2023): OPTION TO WORK FROM HOME AT LEAST 1 DAY PER WEEK BY NUMBER OF EMPLOYEES IN SD COUNTY & EMPLOYMENT CENTER



PERCENTAGE OF EMPLOYEES WITH REMOTE WORK OPTION Businesses that indicated they offer some employees the option to work remotely at least one day per week were subsequently asked to estimate the percentage of their company's employees that are given the option to work remotely. Figure 95 on the next page combines the answers to questions 1 and 2 of the 2023 tracking survey to place the findings in the context of *all* businesses in the region. As noted above, 43% indicated that no employees (0%) were offered the option to work remotely at least one day per week. The remaining businesses varied in how widely they distribute the

13. Because comparatively few businesses had 100 or more employees at their *particular* location within San Diego County, these categories were collapsed into the 50 or more employees category to improve the reliability of estimates. For analyses that examined the number of employees in San Diego County *overall*, the categories were left disaggregated.

option, with 12% offering less than one-quarter of their employees the option to work remotely, 3% offering it to 25% to 49% of their employees, 4% offering it to 50% to 74% of employees, and 37% providing the option to three-quarters or more of their employees.

Figures 96-98 display the percentage of business surveyed that currently (post-pandemic) offer a remote work option to some employees, as well as how widely that option is being offered within their company, by various business characteristics. Businesses in the finance, insurance, and professional services industries, small businesses (less than five employees), and those in the Downtown Employment Center were the most likely to report offering a remote work option to at least 75% of their employees in 2023.

2023 Survey, Question 2 *Approximately what percentage of your company's employees currently have the option to work from home at least one day per week?*

FIGURE 95 POST-PANDEMIC (2023): PERCENTAGE OF EMPLOYEES WITH OPTION TO WORK FROM HOME AT LEAST 1 DAY PER WEEK

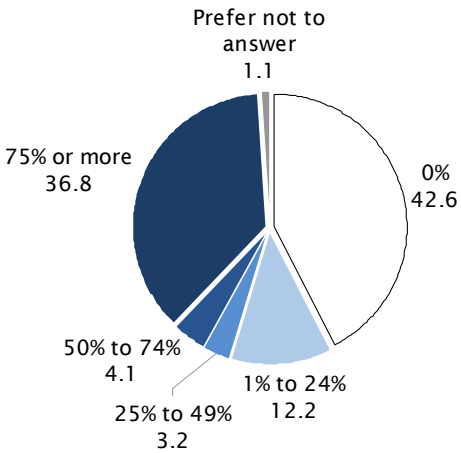


FIGURE 96 POST-PANDEMIC (2023): PERCENTAGE OF EMPLOYEES WITH OPTION TO WORK FROM HOME AT LEAST 1 DAY PER WEEK BY OVERALL & INDUSTRY

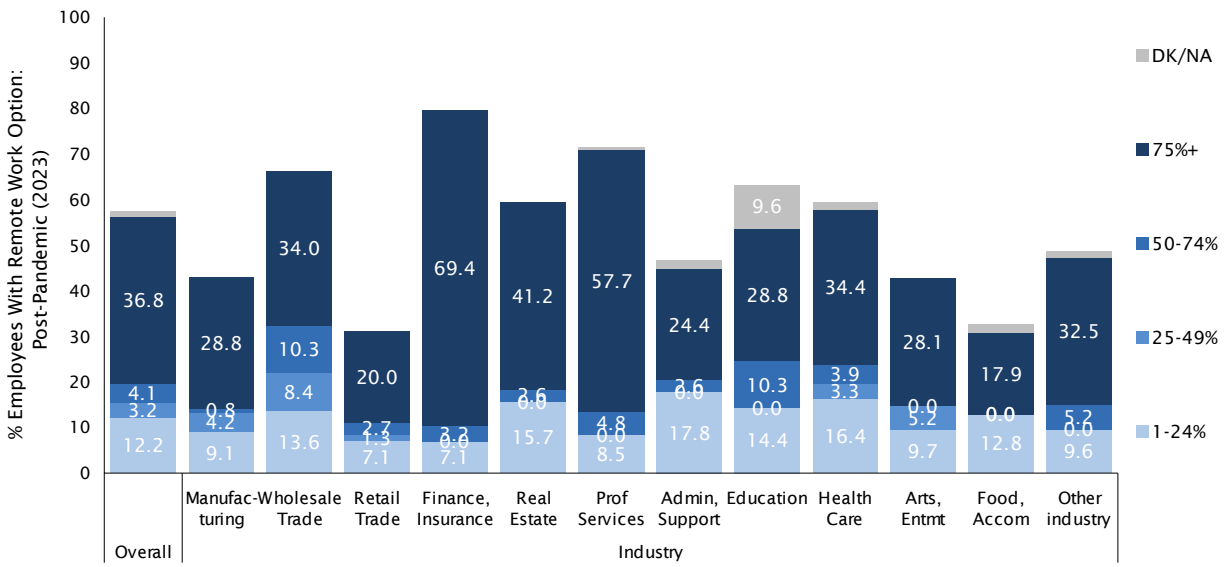


FIGURE 97 POST-PANDEMIC (2023): PERCENTAGE OF EMPLOYEES WITH OPTION TO WORK FROM HOME AT LEAST 1 DAY PER WEEK BY NUMBER OF EMPLOYEES AT LOCATION & TIER 1 EMPLOYMENT CENTER

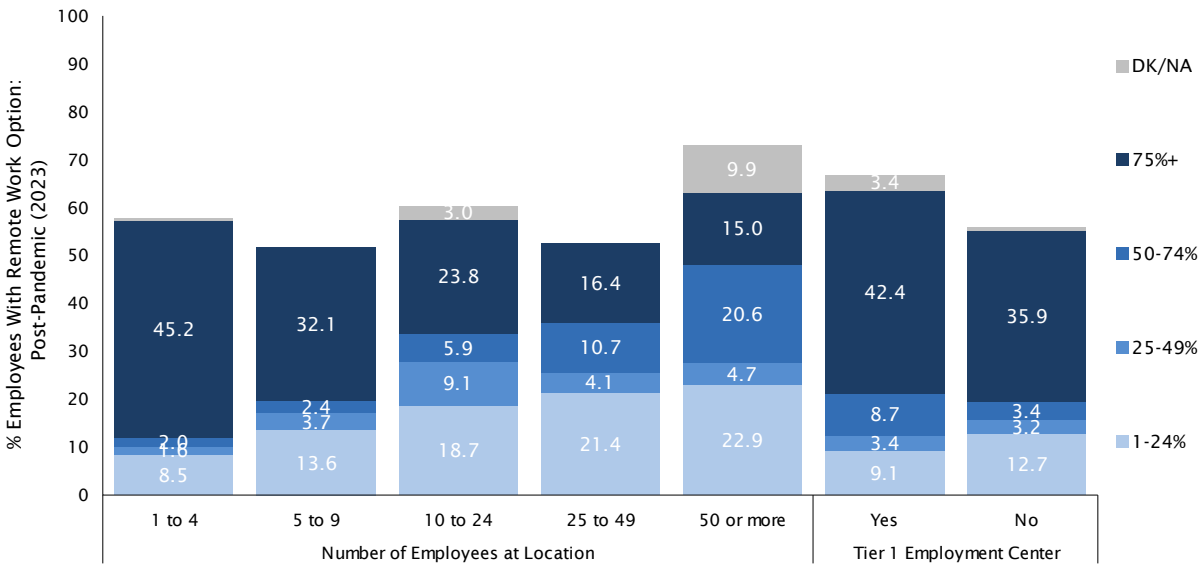
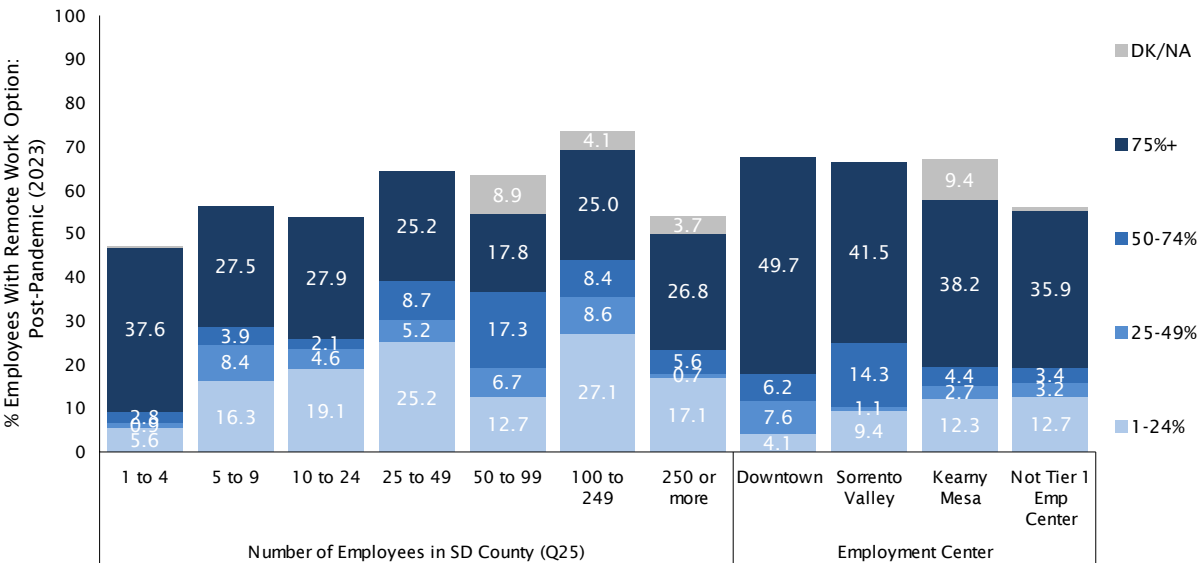


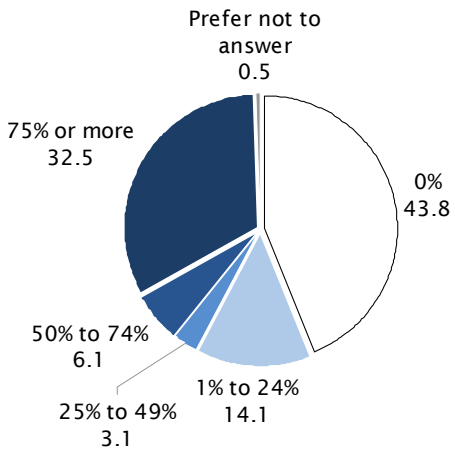
FIGURE 98 POST-PANDEMIC (2023): PERCENTAGE OF EMPLOYEES WITH OPTION TO WORK FROM HOME AT LEAST 1 DAY PER WEEK BY NUMBER OF EMPLOYEES IN SD COUNTY & EMPLOYMENT CENTER



PERCENTAGE OF EMPLOYEES WORKING REMOTELY 1+ DAYS PER WEEK With a greater percentage of businesses offering remote work to their employees post-pandemic, the percentage of their employees working from home at least one day per week also increased. Approximately one-third (33%) of businesses surveyed in 2023 indicated that at least three-quarters of their employees work from home at least one day per week, which is higher than the percentage recorded during the pandemic in 2021 (22%). An additional 6% of businesses estimated 50% to 74% of employees work from home at least one day per week, three percent estimated 25% to 49% of employees were in this category, whereas 14% indicated that less than one-quarter of employees work from home at least one day per week.

2023 Survey, Question 3 *Currently, approximately what percentage of your company's employees actually work from home at least one day per week?*

FIGURE 99 POST-PANDEMIC (2023): PERCENTAGE OF EMPLOYEES THAT WORK FROM HOME AT LEAST 1 DAY PER WEEK



Figures 100-102 show that categories of businesses that are most likely offer employees the *option* to work remotely in 2023 also tended to be the same types of businesses with a high percentage of employees taking advantage of the offer by working from home at least one day per week. That said, it is noteworthy that the percentage of employees who actually work from home at least one day per week *declined*, on average, as business size increased. Even though businesses with 50 or more employees were the most likely to offer a remote work option, these larger businesses were also the least likely to state that 75% or more of their employees actually work from home at least one day per week.

FIGURE 100 POST-PANDEMIC (2023): PERCENTAGE OF EMPLOYEES THAT WORK FROM HOME AT LEAST 1 DAY PER WEEK BY OVERALL & INDUSTRY

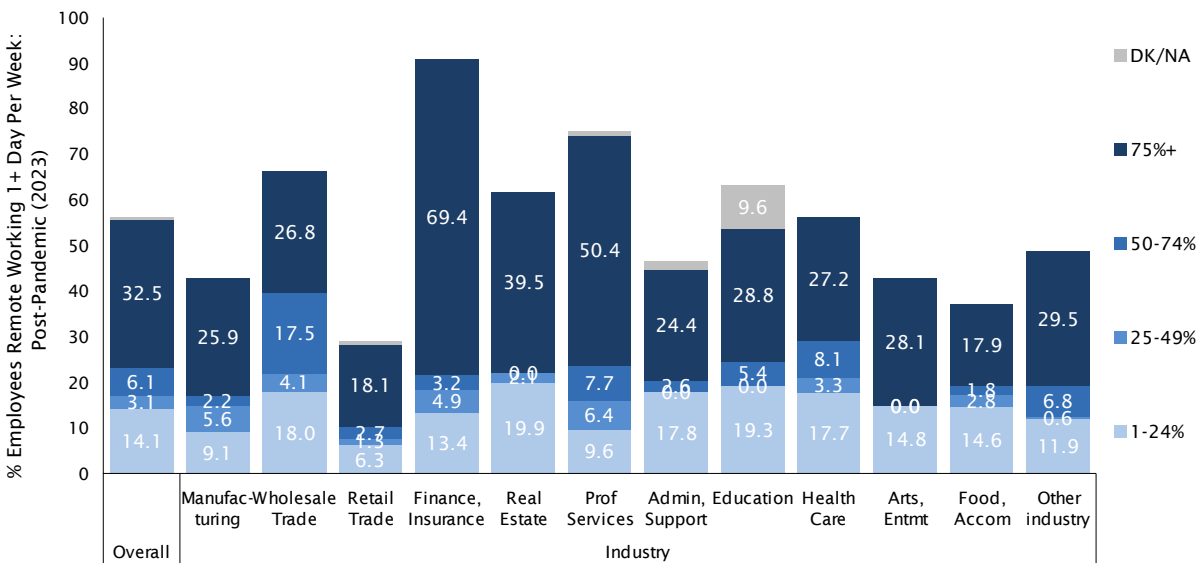


FIGURE 101 POST-PANDEMIC (2023): PERCENTAGE OF EMPLOYEES THAT WORK FROM HOME AT LEAST 1 DAY PER WEEK BY NUMBER OF EMPLOYEES AT LOCATION & TIER 1 EMPLOYMENT CENTER

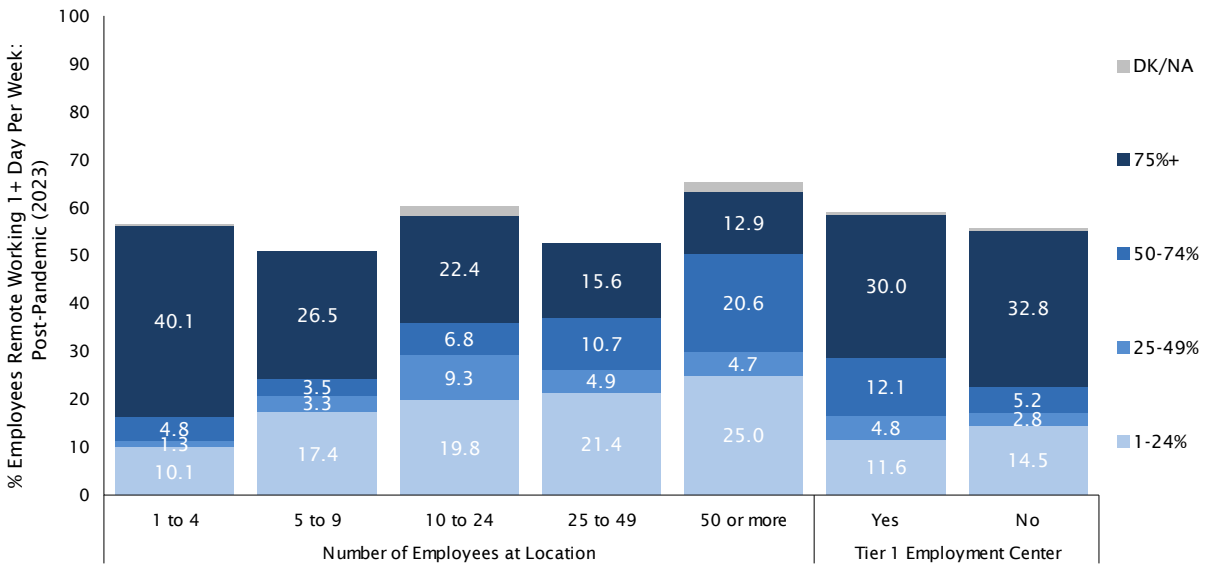
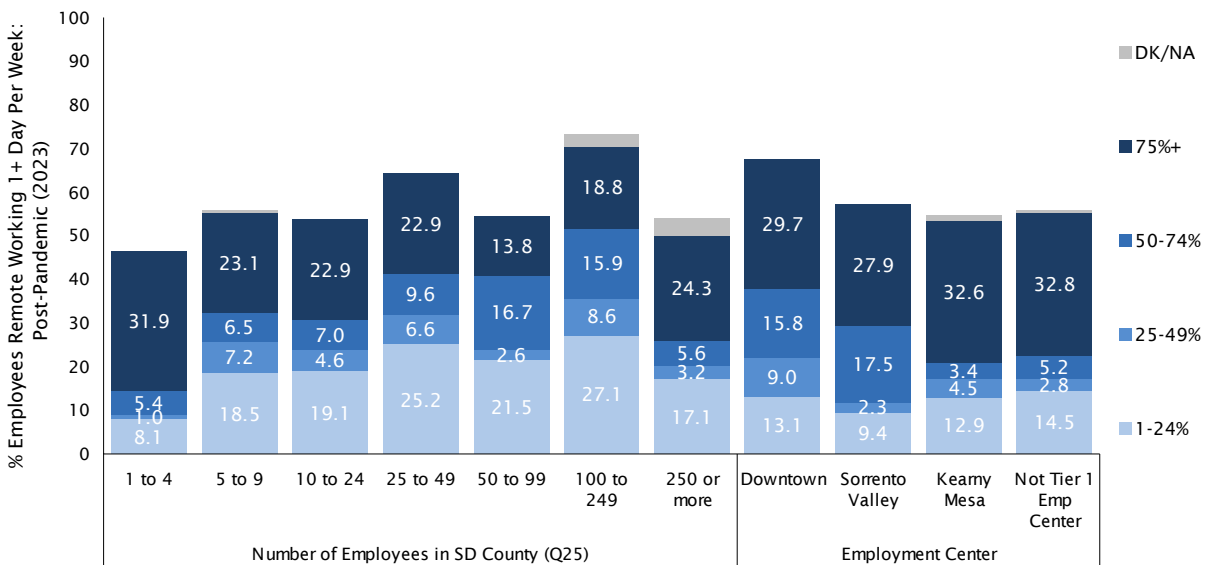


FIGURE 102 POST-PANDEMIC (2023): PERCENTAGE OF EMPLOYEES THAT WORK FROM HOME AT LEAST 1 DAY PER WEEK BY NUMBER OF EMPLOYEES IN SD COUNTY & EMPLOYMENT CENTER



PERCENTAGE OF EMPLOYEES WORKING REMOTELY 3+ DAYS PER WEEK

When asked in 2023 to estimate the percentage of their workforce that is working from home at least three days per week, approximately 45% of businesses in the San Diego region indicated that one or more employees in their organization were working from home most of the time (Figure 103), with 11% indicating that less than one-quarter did so, 5% stating 25% to 49%, 5% indicating 50% to 74%, and 24% reporting that at least three-quarters of their employees were working remotely most days. The percentage of businesses that estimated the majority of their workforce was working from home *most* of the time increased from 22% during the pandemic to

28% post-pandemic. Here again, businesses in the finance, insurance, and professional services industries and smaller companies (less than five employees) were the most likely to report having at least 75% of their employees working remotely three or more days per week (see Figures 104-106).

2023 Survey, Question 4 *Currently, approximately what percentage of your company's employees work from home most of the time - at least three days per week?*

FIGURE 103 POST-PANDEMIC (2023): PERCENTAGE OF EMPLOYEES THAT WORK FROM HOME AT LEAST 3 DAYS PER WEEK

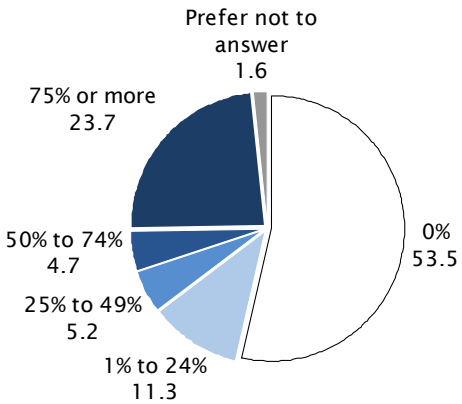


FIGURE 104 POST-PANDEMIC (2023): PERCENTAGE OF EMPLOYEES THAT WORK FROM HOME AT LEAST 3 DAYS PER WEEK BY OVERALL & INDUSTRY

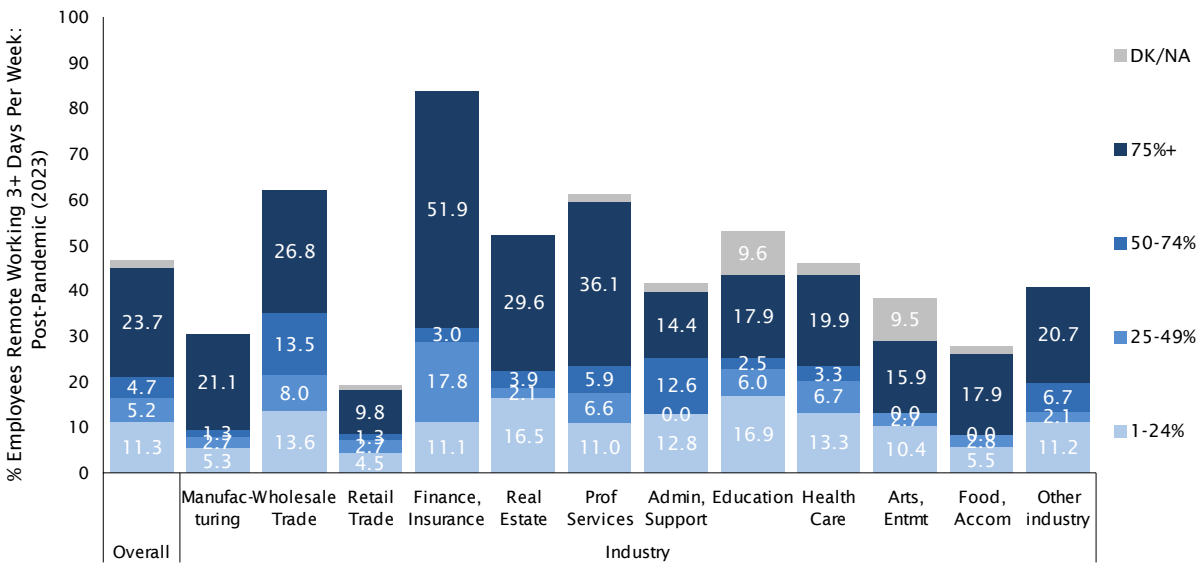


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FIGURE 105 POST-PANDEMIC (2023): PERCENTAGE OF EMPLOYEES THAT WORK FROM HOME AT LEAST 3 DAYS PER WEEK BY NUMBER OF EMPLOYEES AT LOCATION & TIER 1 EMPLOYMENT CENTER

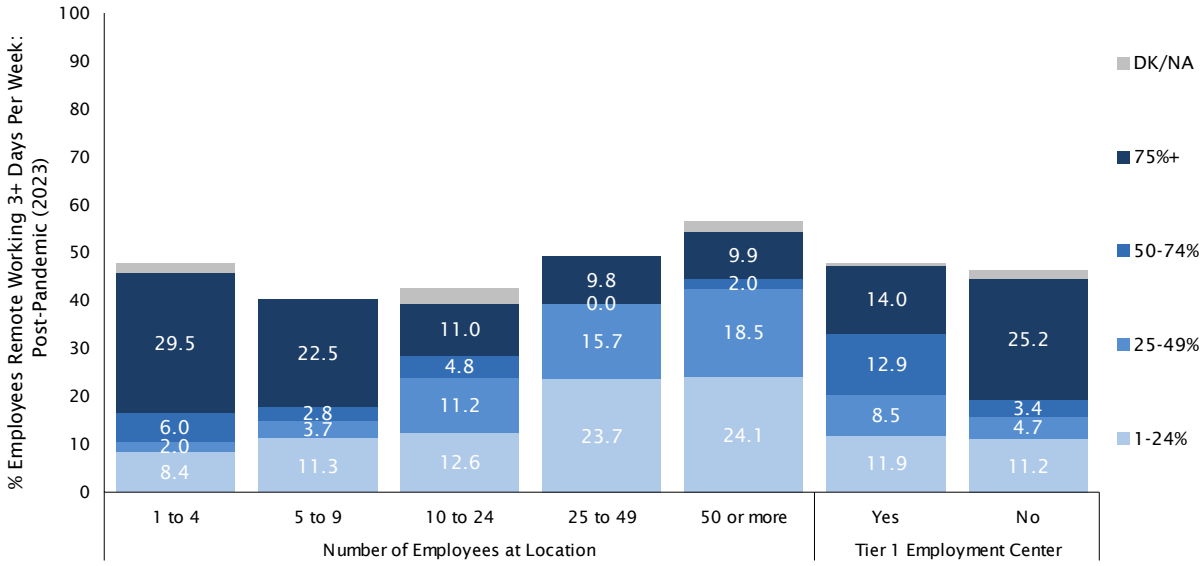
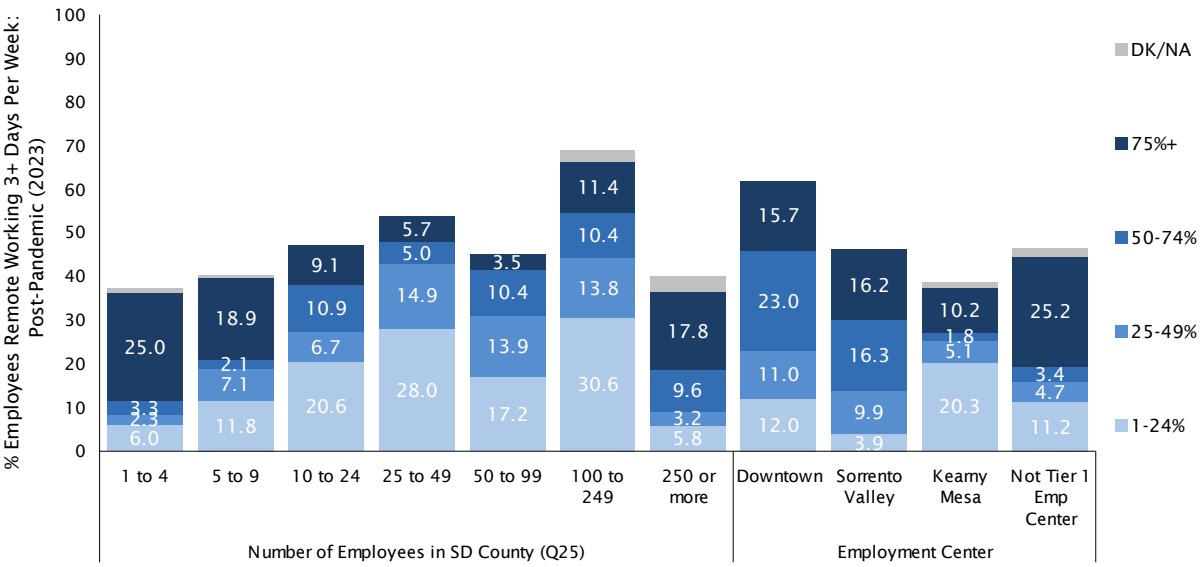


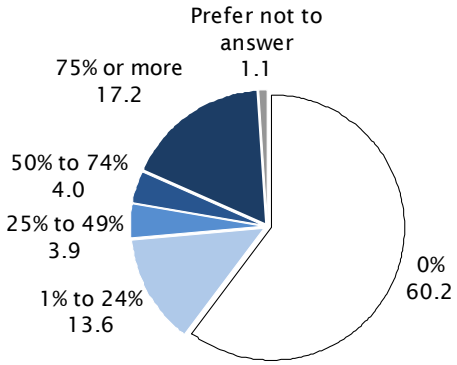
FIGURE 106 POST-PANDEMIC (2023): PERCENTAGE OF EMPLOYEES THAT WORK FROM HOME AT LEAST 3 DAYS PER WEEK BY NUMBER OF EMPLOYEES IN SD COUNTY & EMPLOYMENT CENTER



PERCENTAGE OF EMPLOYEES WORKING REMOTELY 100% OF TIME The final question in this series inquired as to the percentage of employees in their organizations that *always* work from home. Six-in-ten businesses (60%) reported in 2023 that they have no employees (0%) that work from home everyday of the week. Among the remaining businesses, 17% indicated that at least three-quarters of their employees work from home every day, 4% indicated 50% to 74% do so, 4% reported that 25% to 49% of their workforce works from home every day, while 14% offered that less than one-quarter of their employees always work from home (Figure 107).

2023 Survey, Question 5 *Currently, approximately what percentage of your company's employees always work from home? In other words, they work from home every work day.*

FIGURE 107 POST-PANDEMIC (2023): PERCENTAGE OF EMPLOYEES THAT WORK FROM HOME ONLY



Having a high percentage (75%+) of employees that always work from home was most common among businesses in the finance, insurance, and professional services industries, businesses with less than five employees at their location and in San Diego County, and businesses that were not in a Tier 1 Employment Center (see Figures 108-110).

FIGURE 108 POST-PANDEMIC (2023): PERCENTAGE OF EMPLOYEES THAT WORK FROM HOME ONLY BY OVERALL & INDUSTRY

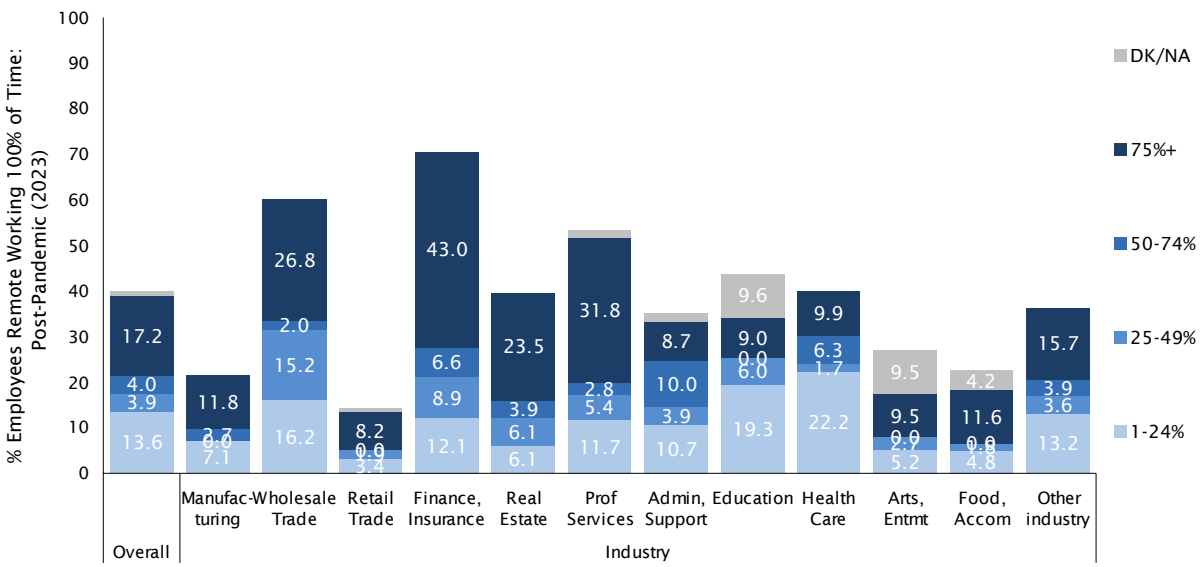


FIGURE 109 POST-PANDEMIC (2023): PERCENTAGE OF EMPLOYEES THAT WORK FROM HOME ONLY BY NUMBER OF EMPLOYEES AT LOCATION & TIER 1 EMPLOYMENT CENTER

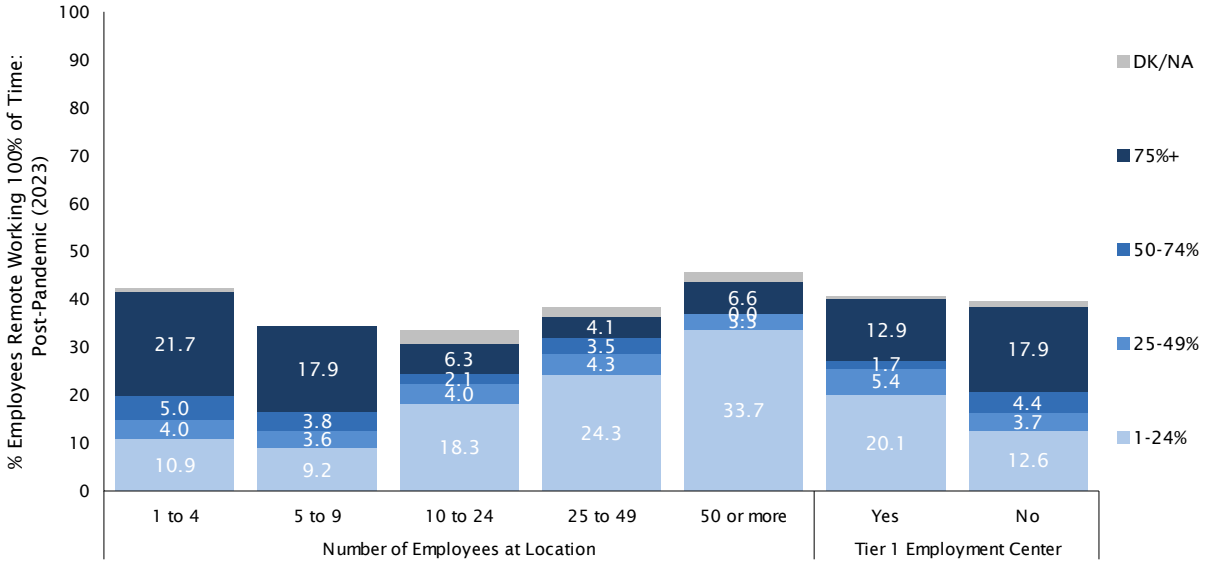
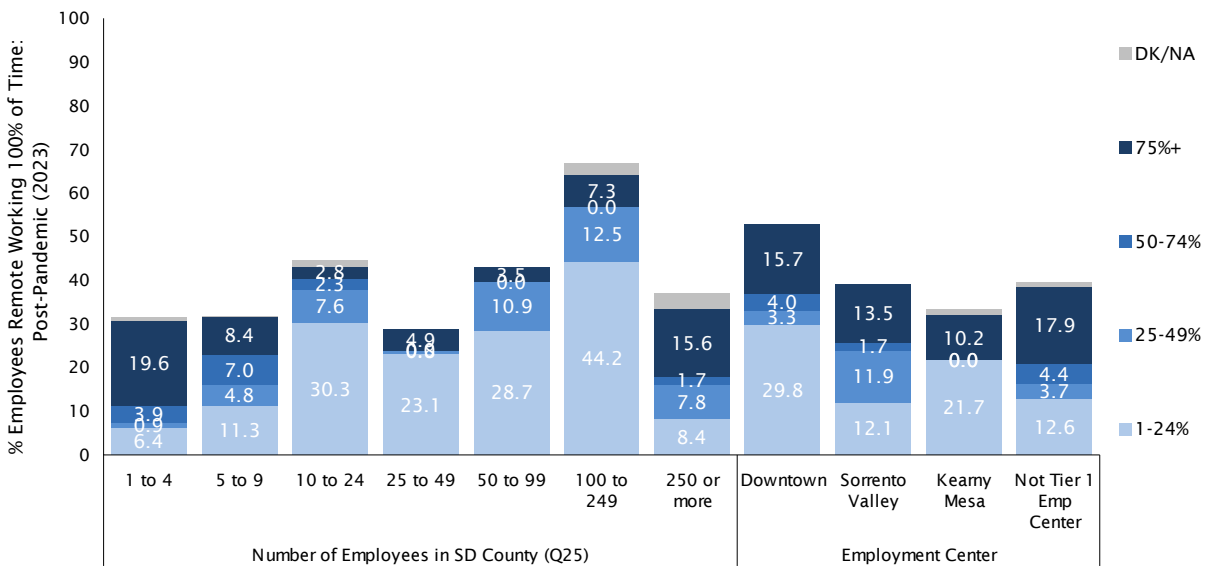


FIGURE 110 POST-PANDEMIC (2023): PERCENTAGE OF EMPLOYEES THAT WORK FROM HOME ONLY BY NUMBER OF EMPLOYEES IN SD COUNTY & EMPLOYMENT CENTER



PANDEMIC TO POST-PANDEMIC CHANGE IN REMOTE WORK The 2023 tracking survey asked businesses to estimate the percentage of their workforce that worked from home at least one day per week in the current environment (post-pandemic) as well as during the pandemic. Figure 111 shows that most businesses (52%) reported that the percentage of their workforce that is working from home is the same today as it was during the pandemic, while 21% indicated that the percentage working from home *increased* during this period, and 24% experienced a *reduction* in the percentage working remotely during this period. What is striking, however, is how much this pattern changes based on the size of the business. As shown in Figure 112, the larger the business, the more likely they were to report a *reduction* in the percentage of their workforce that works remotely at least one day per week during this period.

2023 Survey, Question 7 *During the pandemic in 2020, approximately what percentage of the employees in your company worked from home at least one day per week?*

2023 Survey, Question 3 *Currently, approximately what percentage of your company's employees actually work from home at least one day per week?*

FIGURE 111 POST-PANDEMIC (2023) VS PANDEMIC (2020): PERCENTAGE OF EMPLOYEES THAT WORK FROM HOME AT LEAST 1 DAY PER WEEK

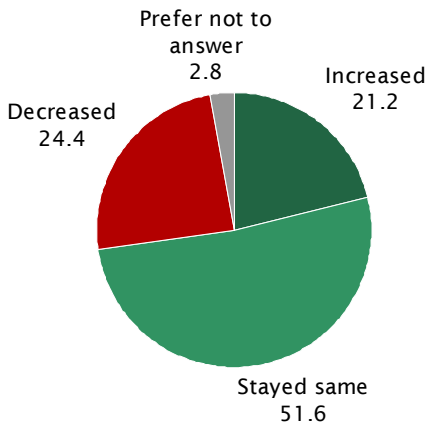
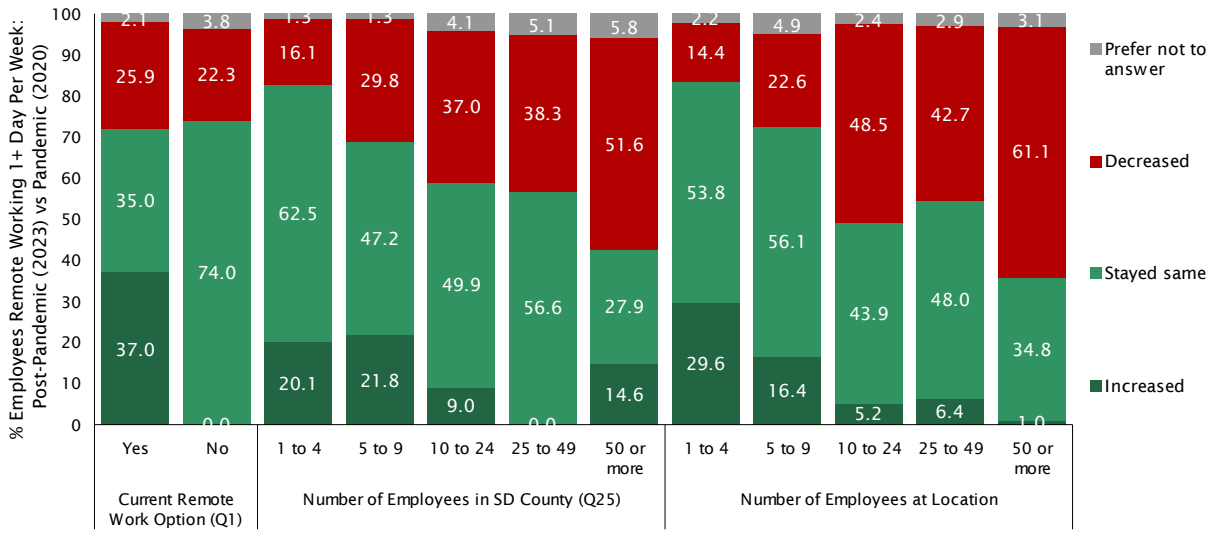


FIGURE 112 POST-PANDEMIC (2023) VS PANDEMIC (2020): PERCENTAGE OF EMPLOYEES THAT WORK FROM HOME AT LEAST 1 DAY PER WEEK BY CURRENT REMOTE WORK OPTION, NUMBER OF EMPLOYEES IN SD COUNTY & NUMBER OF EMPLOYEES AT LOCATION



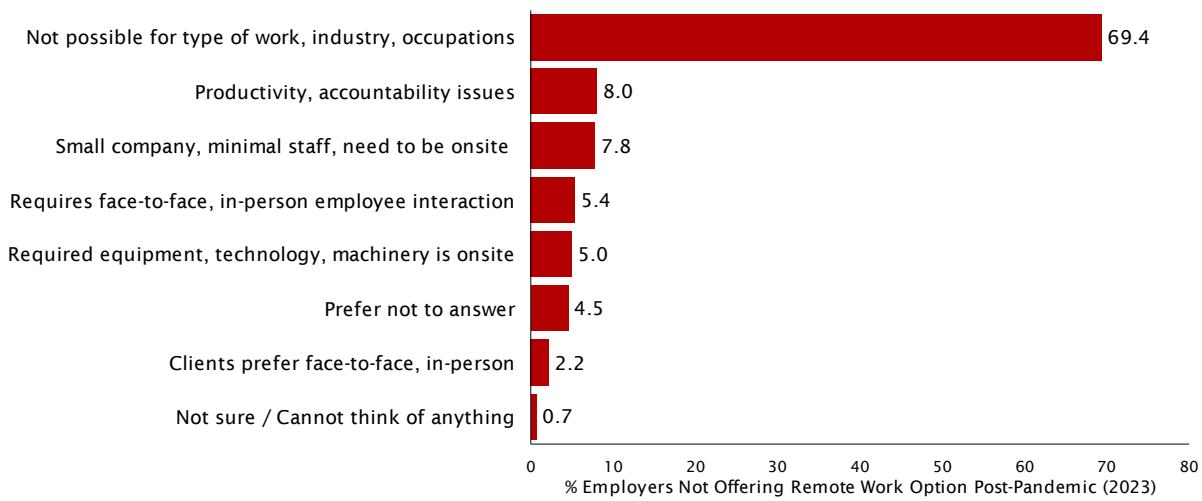
Businesses: Barriers to Remote Work

In the post-pandemic environment (2023), 43% of businesses surveyed indicated that no employees in their organization (0%) are offered the option to work remotely. For businesses that fit this profile, Question 6 of the tracking survey asked them to describe the main reason employees are not allowed to work from home at least one day per week.

By far the most common reason offered for not allowing employees to work remotely was that it was not possible for the type of work required, their industry, and/or the occupations they employ (mentioned by 69% of respondents). An additional 8% mentioned concerns about productivity and/or accountability, 8% mentioned the small size of the company, minimal staff, and a need for staff to be onsite, 5% indicated that their business requires face-to-face, in-person employee interaction, and 5% offered that specialized equipment, technology or machinery was only available onsite as their reason for not allowing employees to work from home (Figure 113).

2023 Survey, Question 6 *What would you say is the main reason why employees are not allowed to work from home at least one day per week?*

Figure 113 Reasons For Not Allowing Employees to Work From Home at Least 1 Day Per Week



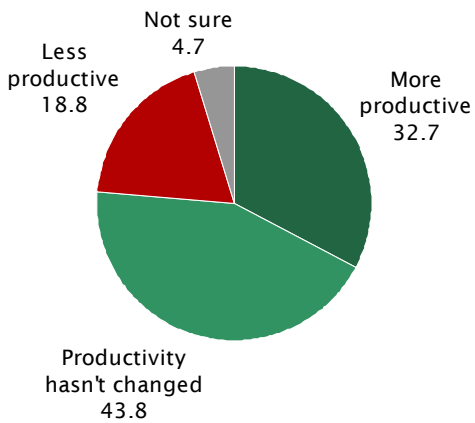
Businesses: Impacts of Remote Work

Businesses that currently (2023) offer one or more employees the option to work from home were asked in the tracking survey to describe their experiences with remote work arrangements—including the biggest challenges, biggest benefits, and the impacts of remote work on various dimensions ranging from profitability and expenses to teamwork, communication, and employee morale.

IMPACT OF REMOTE WORK ON PRODUCTIVITY When asked in 2023 how having some of their employees working from home impacts their company's productivity, approximately 44% indicated that it doesn't change their productivity, one-third (33%) stated that it improves their productivity, while 19% offered that remote work makes their organization less productive. An additional 5% of businesses were unsure.

2023 Survey, Question 8 *Overall, would you say that having some employees working from home makes your company more productive, less productive, or does it not impact your productivity?*

Figure 114 Company's Productivity Due to Employees Working From Home



Figures 115 and 116 on the next page show how the perceived impacts of remote work on their organizations' productivity varied by Tier 1 Employment Center, number of employees in San Diego County, number of employees at their location, whether the percentage of their workforce working remotely increased, decreased, or stayed about the same since the pandemic, the degree to which their company's experiences with remote work have gotten better, worse, or stayed about the same since the pandemic, and whether the company expects to offer a remote work option in the future (2024).

FIGURE 115 COMPANY'S PRODUCTIVITY DUE TO EMPLOYEES WORKING FROM HOME BY TIER 1 EMPLOYMENT CENTER, NUMBER OF EMPLOYEES IN SD COUNTY & NUMBER OF EMPLOYEES AT LOCATION

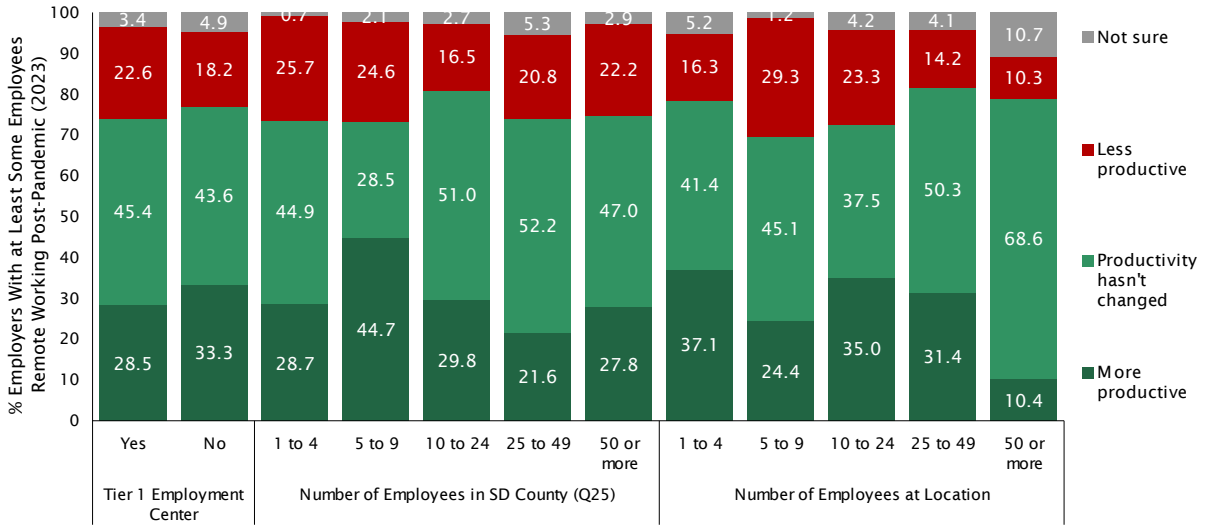
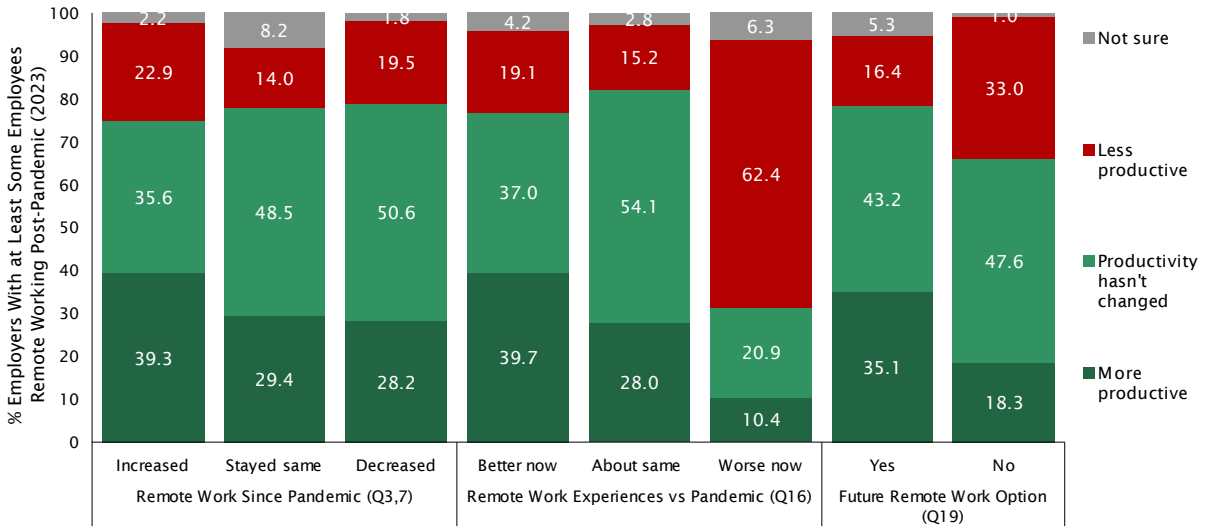


FIGURE 116 COMPANY'S PRODUCTIVITY DUE TO EMPLOYEES WORKING FROM HOME BY REMOTE WORK SINCE PANDEMIC, REMOTE WORK EXPERIENCES VS PANDEMIC & FUTURE REMOTE WORK OPTION

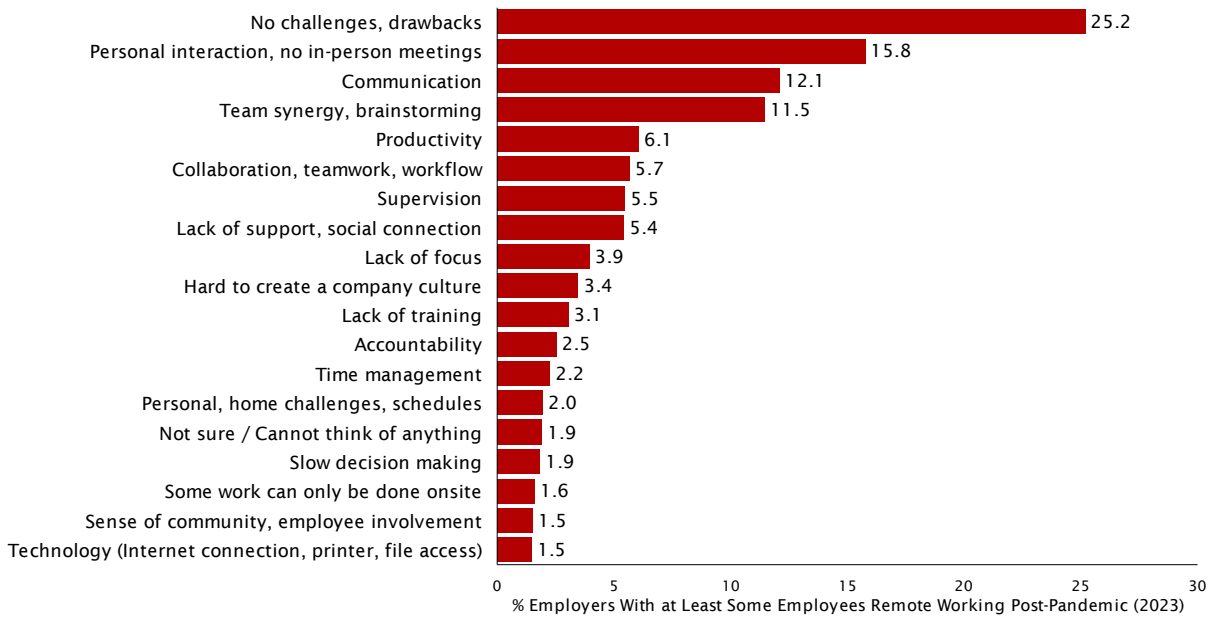


BIGGEST CHALLENGES & BENEFITS TO REMOTE WORK Similar to how it was asked in 2021, the 2023 tracking survey asked all businesses that had at least one employee working remotely to describe the biggest challenges or drawbacks for their business associated with employees working from home (Question 9), as well as the biggest benefits (Question 10). Both questions were administered in an open-ended manner, which allowed respondents to mention any item that came to mind without being prompted by, or restricted to, a particular list of options. True North later reviewed the verbatim responses and grouped them into the categories shown in Figure 117 (challenges) and Figure 118 (benefits).

Among the challenges or drawbacks to having employees working from home, the most common response was there are no challenges or drawbacks (25%), followed by lack of personal interaction/in-person meetings (16%), issues related to communication (12%), and lack of team synergy/brainstorming opportunities (12%).

2023 Survey, Question 9 *What would you say is the biggest challenge or drawback for your business that comes from employees working from home?*

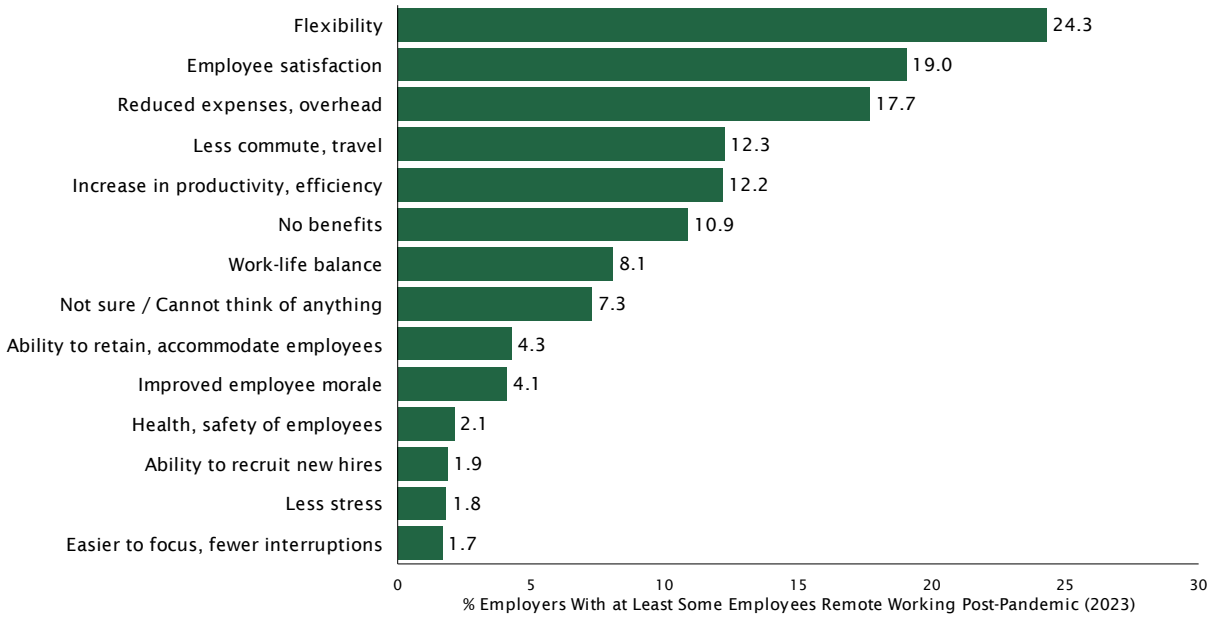
FIGURE 117 BIGGEST CHALLENGE, DRAWBACK FOR BUSINESS DUE TO EMPLOYEES WORKING FROM HOME



When asked in 2023 to describe the biggest benefits to remote work arrangements, flexibility was the most frequent response (24%), followed by employee satisfaction (19%), reduced overhead/expenses (18%), less commuting/traveling (12%), increased productivity/efficiency (12%), and improved work-life balance (8%). Approximately one-in-ten businesses (11%) that have one or more employees working remotely stated flatly that having employees working from home offers no benefits to their business (see Figure 118).

2023 Survey, Question 10 *What would you say is the biggest benefit for your business that comes from employees working from home?*

FIGURE 118 BIGGEST BENEFIT TO BUSINESS FROM EMPLOYEES WORKING FROM HOME



IMPACT OF REMOTE WORK ON BUSINESS ASPECTS

Having captured the most salient challenges and benefits of remote work arrangements for businesses in an open-ended manner (see prior section), the tracking survey next presented respondents with the list of items shown on the left of Figure 119 on the next page and simply asked whether having more employees working from home has helped, hurt, or had no impact on this dimension of their business in 2023. 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 had been impacted (helped or hurt).

In 2023, businesses reported that employee morale, business expenses, and the ability to retain good employees were the three dimensions most impacted by having employees working at home, followed by teamwork, communication/coordination, ability to identify and manage poor performing employees, and ability to hire people who *don't* live in San Diego County. At the other end of the spectrum, just one-third of businesses indicated that remote working arrangements had impacted data security and their ability to hire people who live in the San Diego region.

For every dimension tested in 2023, some respondents felt that remote work arrangements helped their business, while others perceived they hurt their business. Figure 120 on the next page displays the findings of Question 11 in a format that makes it easier to identify dimensions for which the *net* impact across all businesses was generally hurtful or helpful. For all but four of the dimensions tested, more businesses in 2023 perceived that remote working arrangements were helpful to their business than hurtful, which is in stark contrast to the patterns found when this question was asked during the pandemic (see Figure 60 on page 40 for comparable figure).

In the aggregate, the dimensions with the largest net benefits were the ability to retain good employees, business expenses, ability to hire people who don't live in San Diego County, and employee morale, while those with the largest net determinants were teamwork, employee communication/coordination, and ability to identify and manage poor performers.

2023 Survey, Question 11 *Next are a few questions about how remote work impacts certain aspects of your business. In general, do you find that employees working from home has helped, had no impact, or hurt: _____?*

FIGURE 119 IMPACT OF EMPLOYEES WORKING FROM HOME

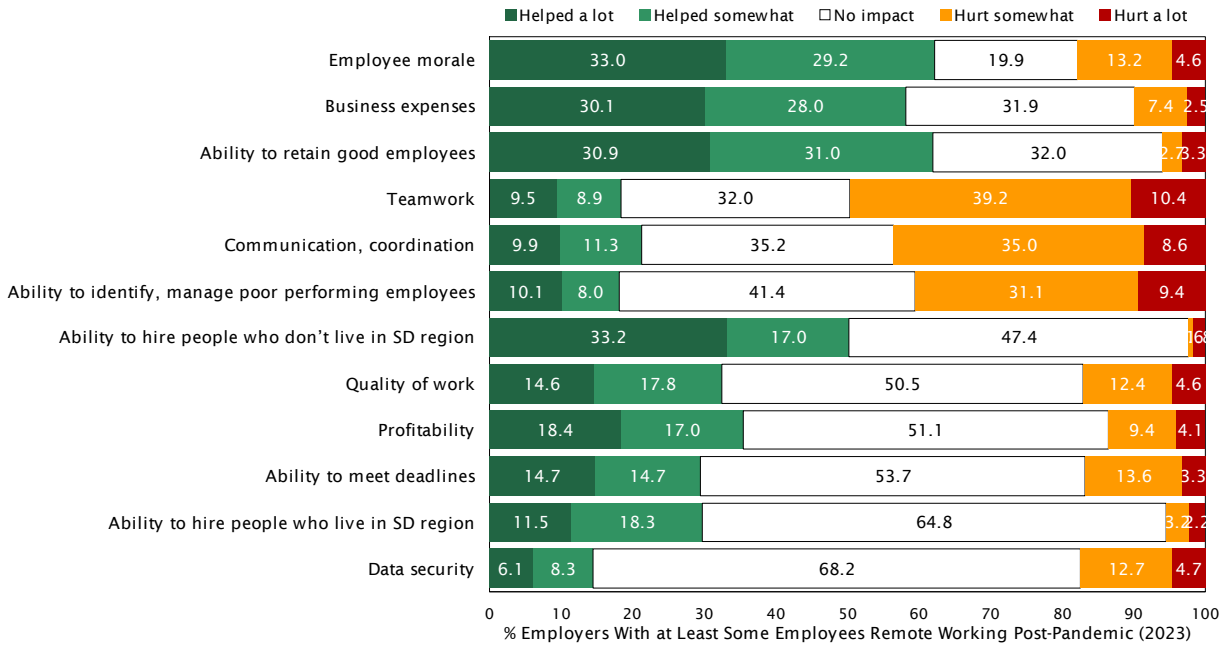
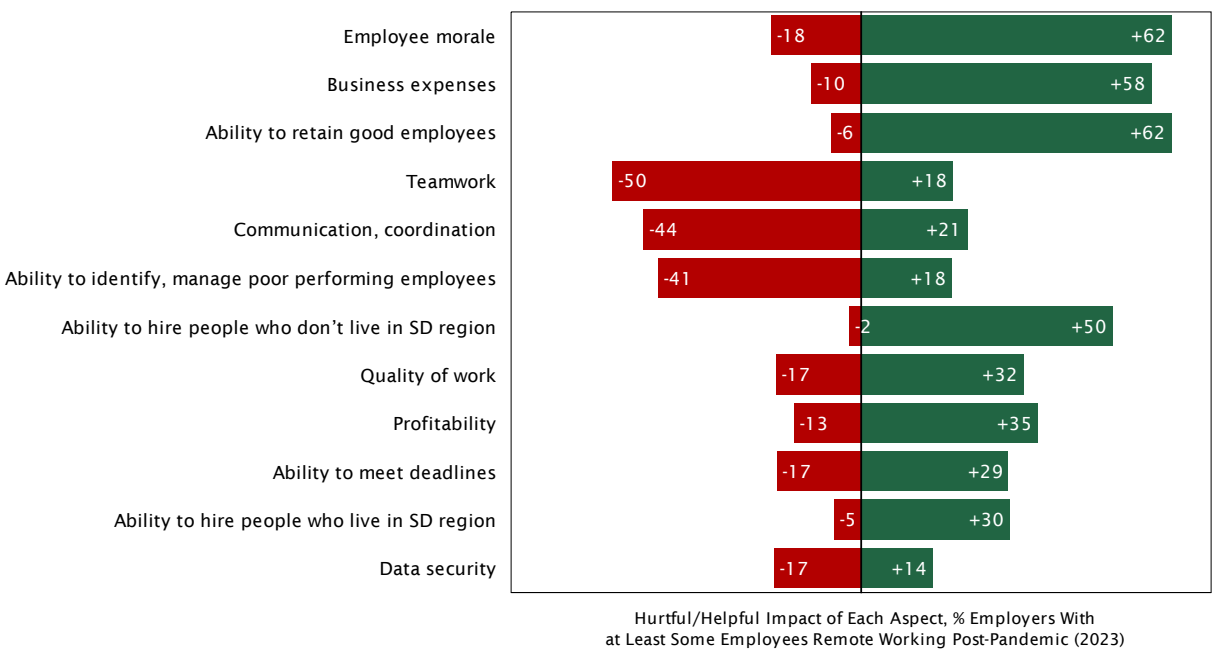


FIGURE 120 PERCENTAGE OF BUSINESSES CITING HURTFUL/HELPFUL IMPACT OF EMPLOYEES WORKING FROM HOME



ACTIONS TAKEN TO ACCOMMODATE REMOTE WORK Businesses that reported having remote work arrangements in 2023 were subsequently asked to identify actions their business may have taken to accommodate employees working from home (or problems experienced). As shown in Figure 121, most businesses surveyed in 2023 indicated that they had purchased technology for employees to keep at home (69%) and improved communications hardware or software (56%) to accommodate employees working remotely, while just under half of businesses indicated they had changed their data security processes (49%), reduced their building square footage or had plans to do so (44%), and expanded their online presence (44%). Approximately one-third of businesses (34%) indicated they had terminated building leases or had plans to do so in response to more employees working from home, while 29% experienced problems due to some employees having poor Internet access at their home.

For the interested reader, Figure 122 shows how the responses to Question 12 varied according to whether the businesses had increased the percentage of their workforce working remotely during the pandemic (dark green bars) or kept it the same (light green bars).

2023 Survey, Question 12 *In response to more employees working from home, has your business: _____?*

FIGURE 121 CHANGES & CHALLENGES DUE TO EMPLOYEES WORKING FROM HOME

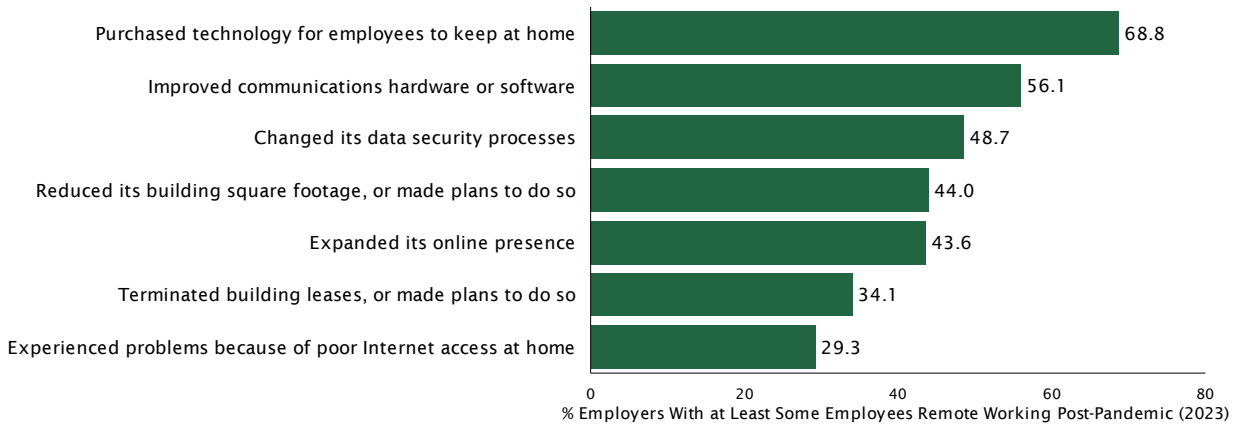
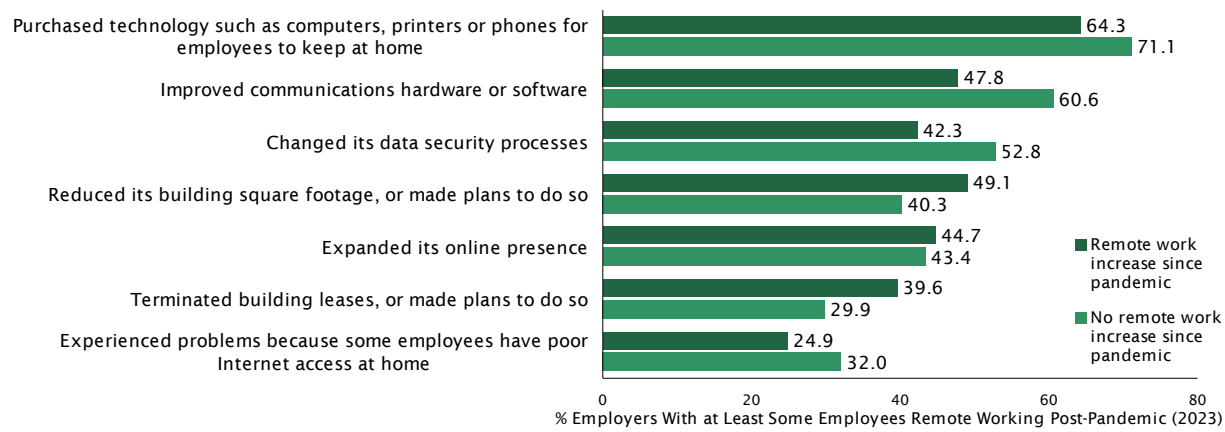


FIGURE 122 CHANGES & CHALLENGES DUE TO EMPLOYEES WORKING FROM HOME BY REMOTE WORK INCREASE SINCE PANDEMIC (AMONG BIZ WITH CURRENT REMOTE WORKERS)



ALLOWING EMPLOYEES FLEXIBILITY TO CHANGE SCHEDULE

New to the 2023 tracking survey, businesses that offered remote work to at least some employees were asked whether employees have the flexibility to change which days of the week they work from home. Figure 123 places the results of Question 13 in the context of all businesses. Approximately 37% of businesses indicated that their remote work employees have the flexibility to change which days of the week they work from home, while 15% indicated that employees have set days they work from home. The remaining businesses had no employees working remotely (44%), or were unsure (2%) or preferred to not answer the question (2%). Figures 124-126 show how the percentage of businesses that offer employees the flexibility to change which days of the week they work from home varied across subgroups.

2023 Survey, Question 13 *Do employees have the flexibility to change which days of the week they work from home, or do employees have set days of the week that they work from home?*

FIGURE 123 ALLOW EMPLOYEES FLEXIBILITY TO CHANGE WHICH DAYS WORK FROM HOME

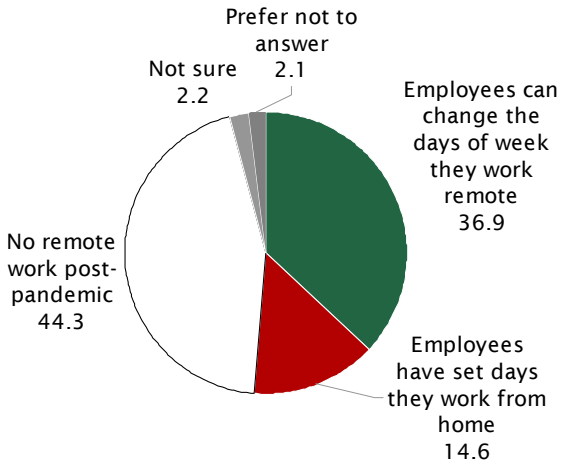


FIGURE 124 ALLOW EMPLOYEES FLEXIBILITY TO CHANGE WHICH DAYS WORK FROM HOME BY INDUSTRY

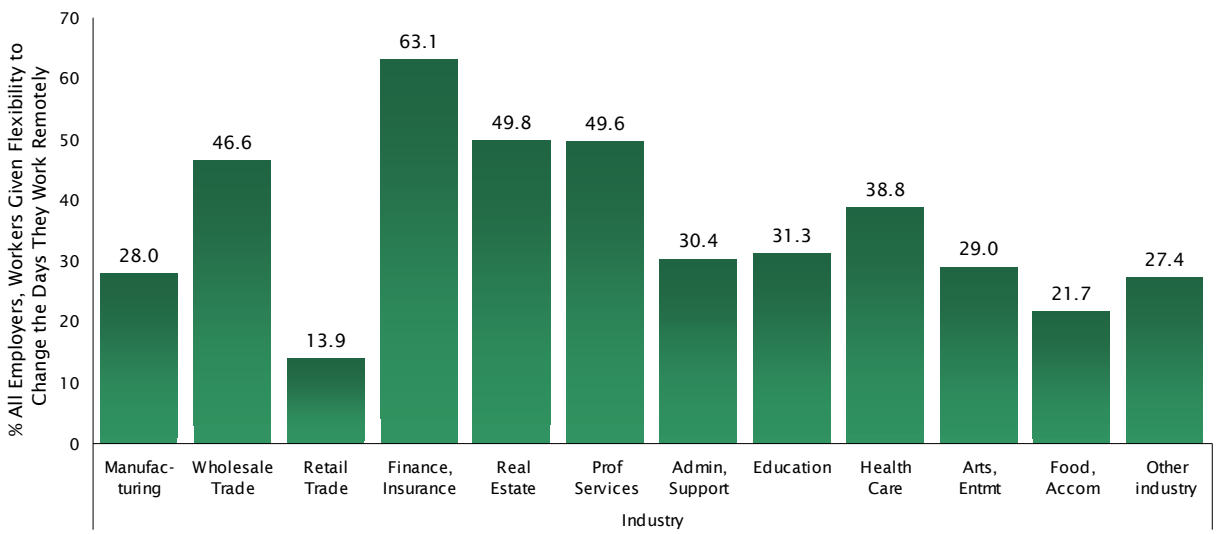


FIGURE 125 ALLOW EMPLOYEES FLEXIBILITY TO CHANGE WHICH DAYS WORK FROM HOME BY NUMBER OF EMPLOYEES AT LOCATION & TIER 1 EMPLOYMENT CENTER

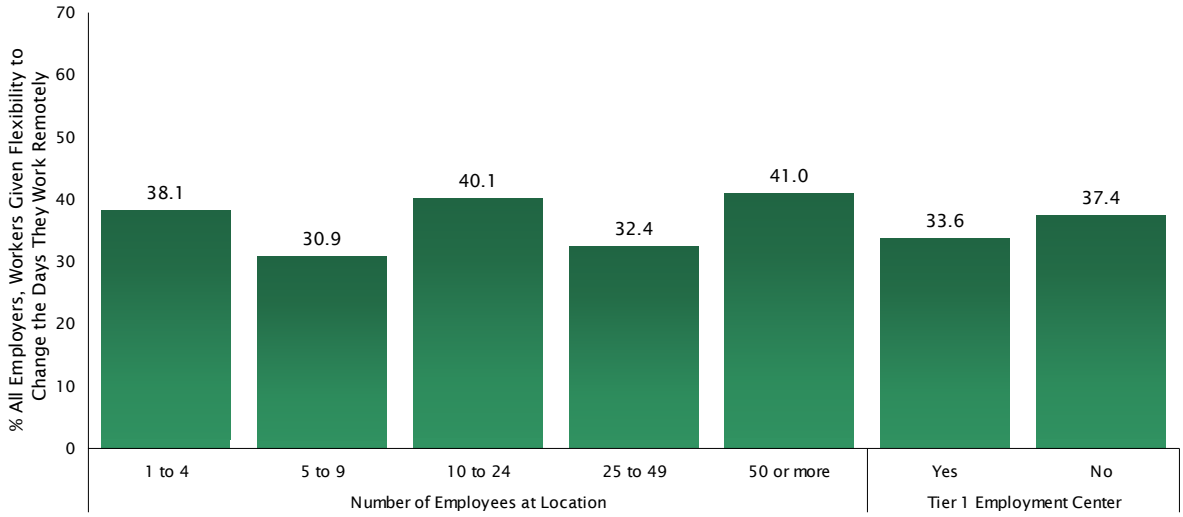
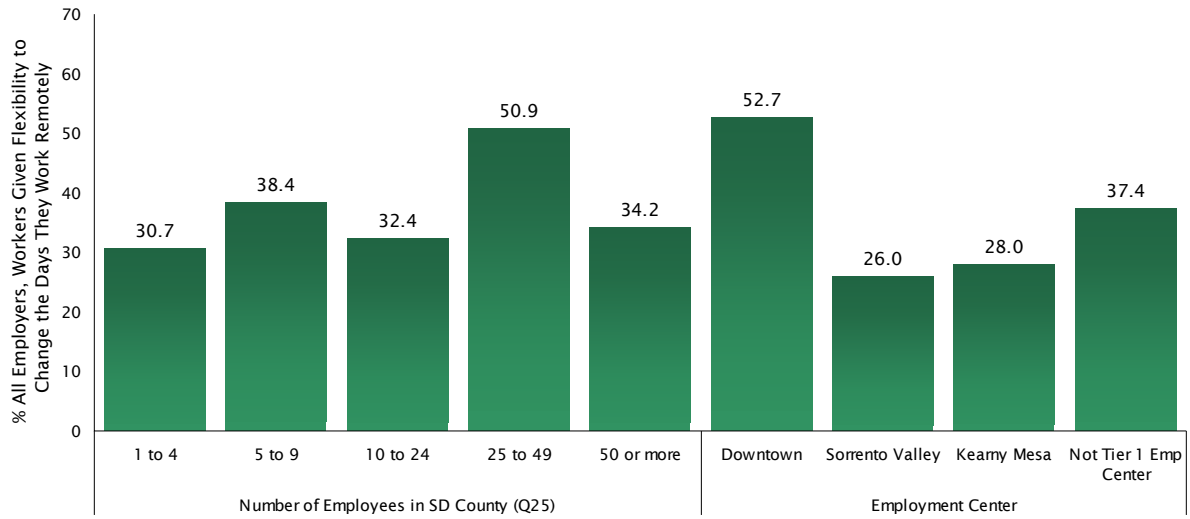


FIGURE 126 ALLOW EMPLOYEES FLEXIBILITY TO CHANGE WHICH DAYS WORK FROM HOME BY NUMBER OF EMPLOYEES IN SD COUNTY & EMPLOYMENT CENTER



ALLOWING EMPLOYEES TO MOVE AWAY Under a remote work model, the proximity of an employee's home relative to a central work site is less important than when that same employee has to commute to a work site. Businesses that allowed employees to work remotely in 2023 were asked in Question 14 whether they had allowed some existing employees to move away from the San Diego region and keep their jobs by working from home (see Figure 127). Overall, 24% of businesses surveyed in 2023 indicated that they had allowed this practice, with the remainder either not allowing remote work employees to move out of the San Diego region (28%), not allowing remote work at all (44%), or were unsure/unwilling to answer the question (3%). In 2023, the policy of allowing remote work employees to move out of the San Diego region and keep their jobs was most common among businesses in the finance, insurance, and professional services industries, businesses with at least 25 employees at their location and 50 or more employees in the San Diego region, and those in Tier 1 Employment Centers (see Figures 128-130).

2023 Survey, Question 14 *During the past two years, has your company allowed some existing employees to move away from the San Diego region and keep their jobs by working from home?*

FIGURE 127 ALLOWED EMPLOYEES TO MOVE AWAY & KEEP THEIR JOB BY TELEWORKING

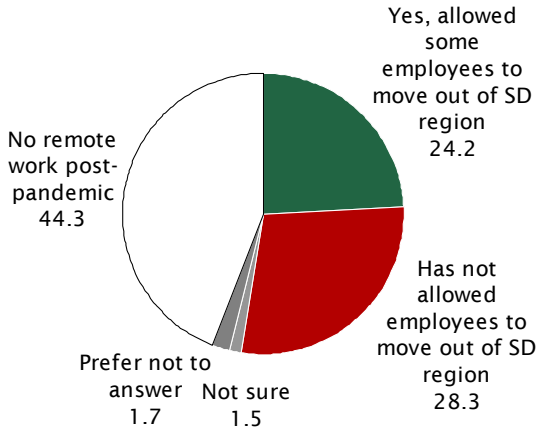


FIGURE 128 ALLOWED EMPLOYEES TO MOVE AWAY & KEEP THEIR JOB BY TELEWORKING BY INDUSTRY

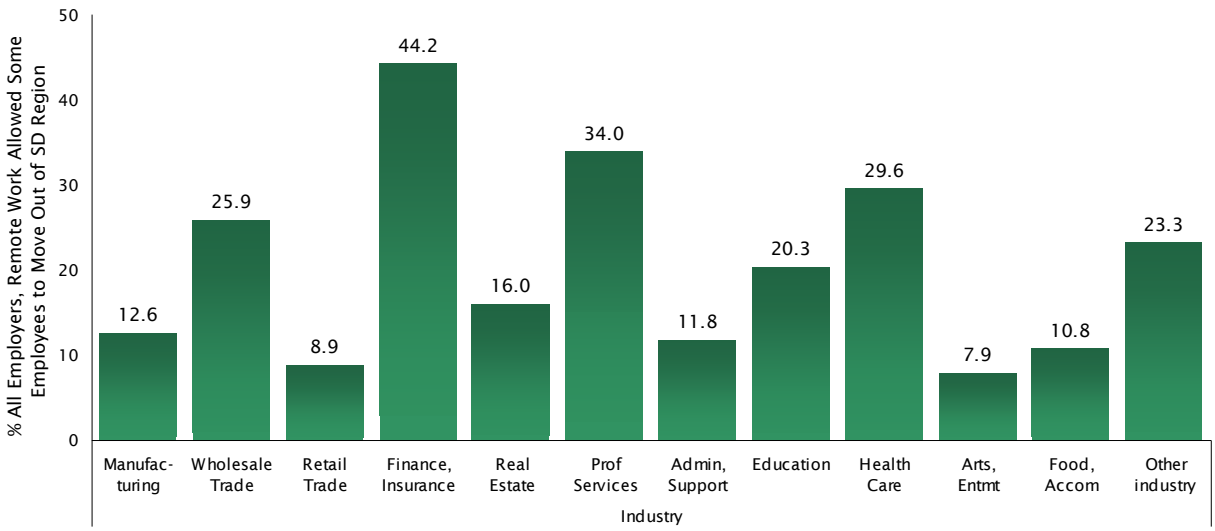


FIGURE 129 ALLOWED EMPLOYEES TO MOVE AWAY & KEEP THEIR JOB BY TELEWORKING BY NUMBER OF EMPLOYEES AT LOCATION & TIER 1 EMPLOYMENT CENTER

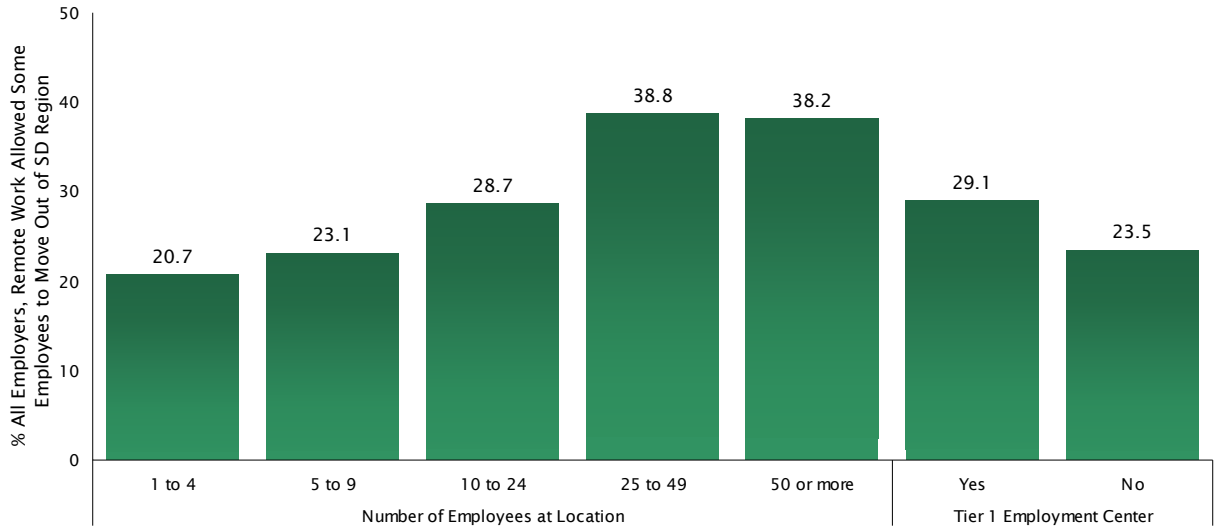
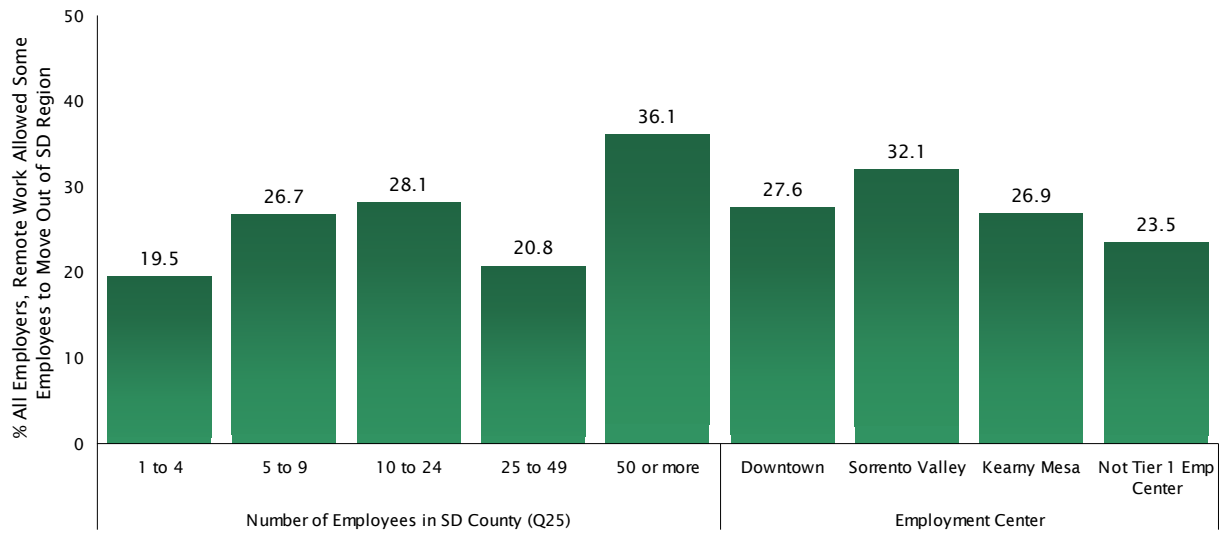


FIGURE 130 ALLOWED EMPLOYEES TO MOVE AWAY & KEEP THEIR JOB BY TELEWORKING BY NUMBER OF EMPLOYEES IN SD COUNTY & EMPLOYMENT CENTER



NEW HIRE RELOCATION POLICY In addition to allowing existing employees to move away from the San Diego region and work remotely, the 2023 tracking survey inquired as to whether local businesses had hired people who live in other parts of the state or country and allowed them to remain at those locations working remotely (rather than relocate to the San Diego region). Approximately one-in-five businesses (21%) indicated that they had hired employees outside the San Diego region to work remotely without requiring them to relocate (see Figure 131). When compared to their counterparts, this practice was noticeably more common among companies in the professional services industry, those with 50 or more employees at their location and in the region, and businesses in Tier 1 Employment Centers (see Figures 132-134).

2023 Survey, Question 15 *During the past two years, has your company hired people who live in other parts of the State or country and allowed them to stay where they are, rather than relocate to the San Diego region?*

FIGURE 131 COMPANY HIRED OUT OF STATE EMPLOYEES TO WORK FROM HOME AND NOT RELOCATE TO SD

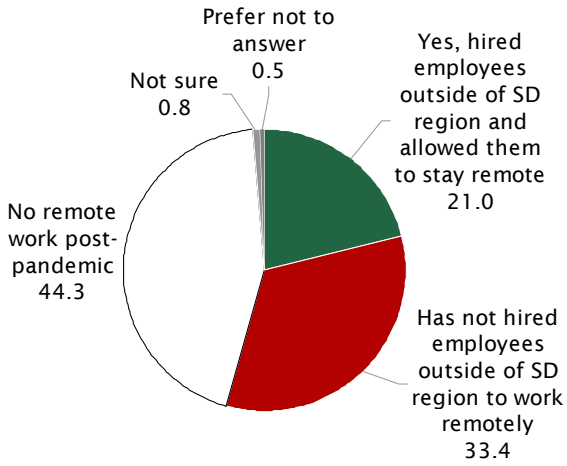


FIGURE 132 COMPANY HIRED OUT OF STATE EMPLOYEES TO WORK FROM HOME AND NOT RELOCATE TO SD BY INDUSTRY

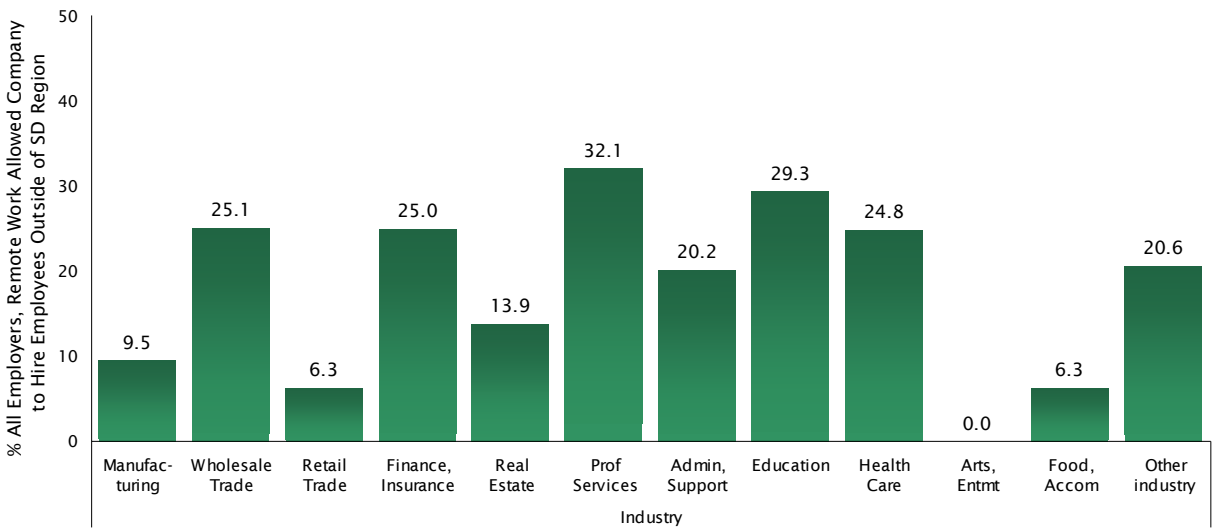


FIGURE 133 COMPANY HIRED OUT OF STATE EMPLOYEES TO WORK FROM HOME AND NOT RELOCATE TO SD BY NUMBER OF EMPLOYEES AT LOCATION & TIER 1 EMPLOYMENT CENTER

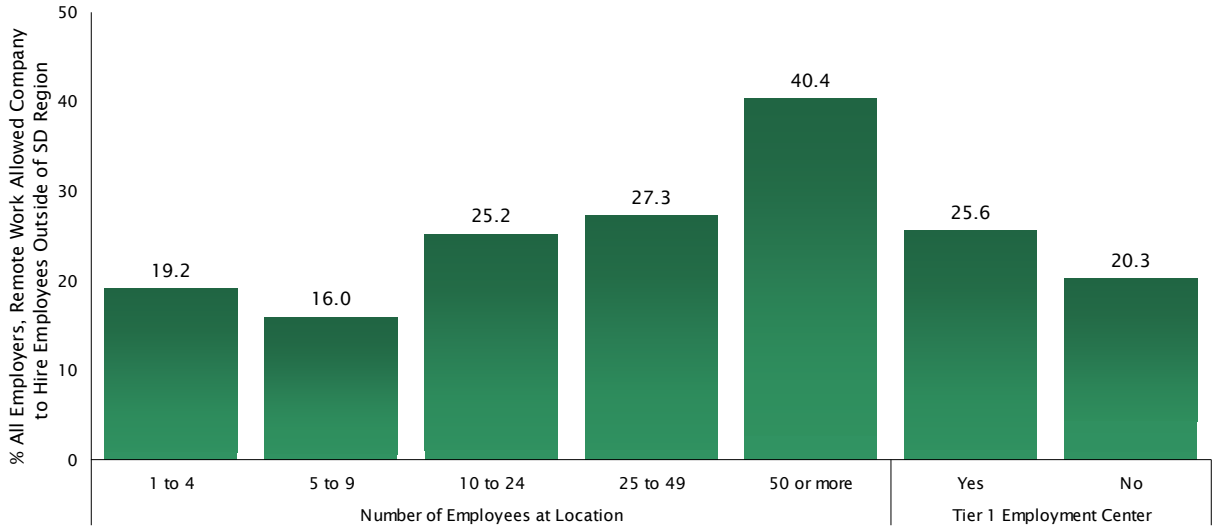
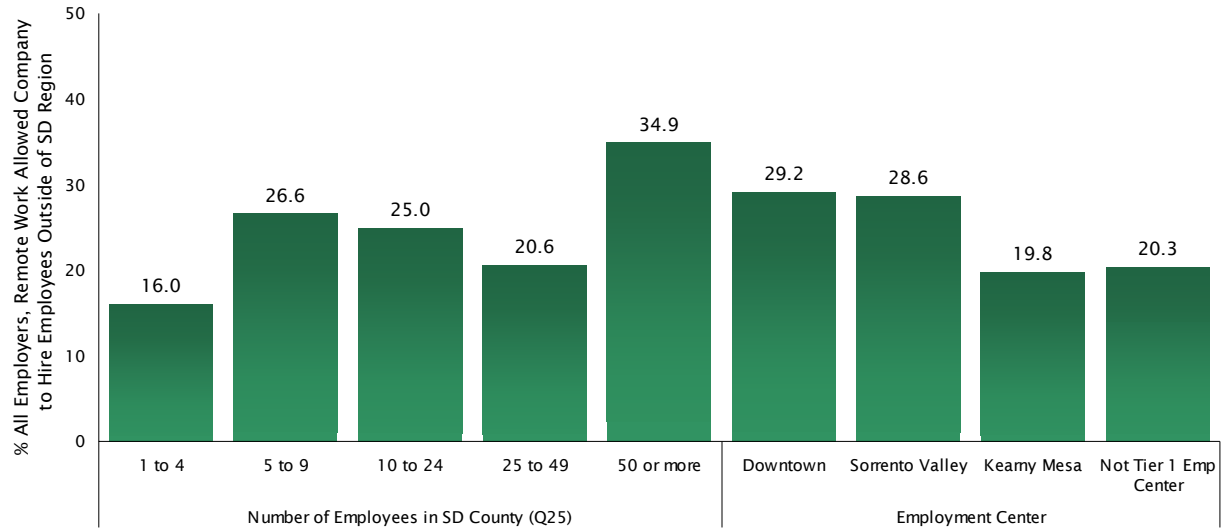


FIGURE 134 COMPANY HIRED OUT OF STATE EMPLOYEES TO WORK FROM HOME AND NOT RELOCATE TO SD BY NUMBER OF EMPLOYEES IN SD COUNTY & EMPLOYMENT CENTER



REMOTE WORK EXPERIENCES COMPARED TO PANDEMIC

Among businesses that had one or more employees working remotely in the post-pandemic environment, Question 16 in the tracking survey simply asked if their company's experiences with employees working from home are better now, worse now, or about the same as they were in 2020 during the pandemic. As show in Figure 135 on the next page, businesses were evenly split between those who felt that their experiences with remote work have improved since 2020 (46%) and those who felt they remained about the same (48%). Just 4% of businesses offering a remote work option in the post-pandemic environment felt that their experiences with employees working from home have gotten worse since 2020, whereas 3% were unsure or unwilling to answer the question.[14]

14. Note that approximately one-third of businesses asked this question had zero (0) employees working remotely during the pandemic.

2023 Survey, Question 16 *Would you say that your company's experiences with employees working from home are better now, worse now, or about the same as they were in 2020 during the pandemic?*

FIGURE 135 COMPANY EXPERIENCES WITH EMPLOYEES WORKING FROM HOME COMPARED TO PANDEMIC

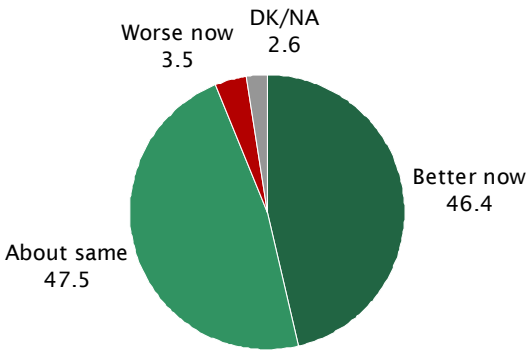
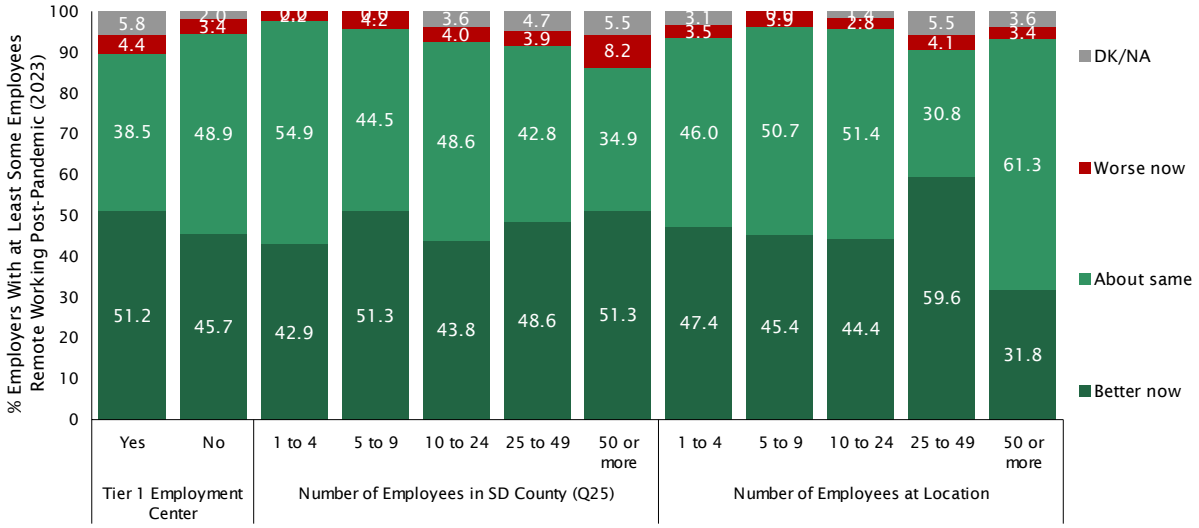


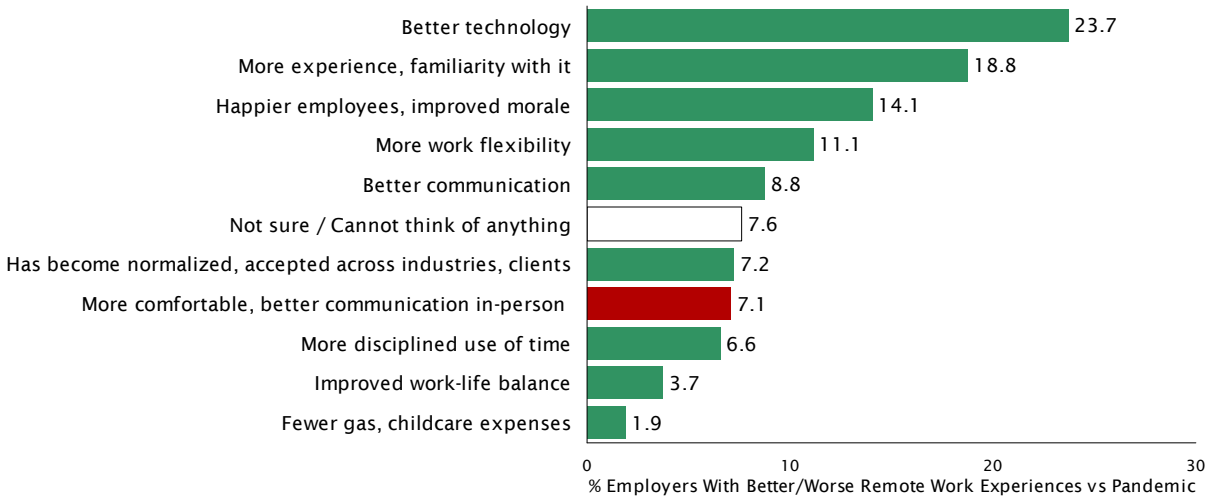
FIGURE 136 COMPANY EXPERIENCES WITH EMPLOYEES WORKING FROM HOME COMPARED TO PANDEMIC BY TIER 1 EMPLOYMENT CENTER, NUMBER OF EMPLOYEES IN SD COUNTY & NUMBER OF EMPLOYEES AT LOCATION



When asked what specifically makes their company's experiences with remote work better or worse now than when compared to the pandemic period, the most common responses among those who reported their experiences were better now (green bars) were they have better technology now (24%), have more experience/are more familiar with remote work now (19%), and it's improved employee morale/happiness (14%). Among the few respondents who felt their company's remote work experiences are worse now than during the pandemic, the reasons centered on in-person interactions being preferred and allowing for better communication (7%).

2023 Survey, Question 17 *What makes your company's remote work experiences <better/ worse> now?*

FIGURE 137 FACTORS MAKING REMOTE EXPERIENCES BETTER/WORSE THAN PANDEMIC

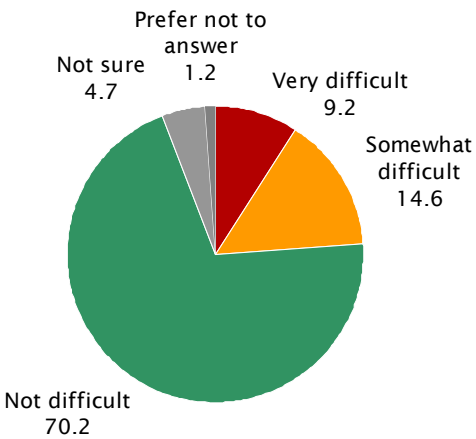


DIFFICULTY ATTRACTING, RETAINING EMPLOYEES DUE TO REMOTE WORK POLICY

New to the 2023 tracking survey, Question 18 asked *all* respondents whether their company has found it difficult to attract and retain highly qualified employees during the past two years because the candidates want to work from home more often than their company allows for the position. Overall, 9% of companies indicated that the remote work expectations of candidates has made it very difficult to attract and retain high qualified employees during the past two years, and an additional 15% indicated it has made it somewhat difficult. The remaining respondents experienced no difficulty in hiring qualified employees for this reason (70%), were unsure (5%), or were unwilling to answer the question (1%).

2023 Survey, Question 18 *During the past two years, has your company found it difficult to attract and retain highly qualified employees because the employees want to work from home more often than your company allows for the position?*

FIGURE 138 DIFFICULT TO ATTRACT, RETAIN QUALIFIED EMPLOYEES DUE TO REMOTE WORK POLICY



Figures 139-141 show how the responses to Question 18 varied based on industry, number of employees at their location, Tier 1 Employment Center, whether they currently offer a remote work option, whether they anticipate offering some employees a remote work option in 2024, number of employees in the San Diego region, and employment center status.

FIGURE 139 DIFFICULT TO ATTRACT, RETAIN QUALIFIED EMPLOYEES DUE TO REMOTE WORK POLICY BY INDUSTRY

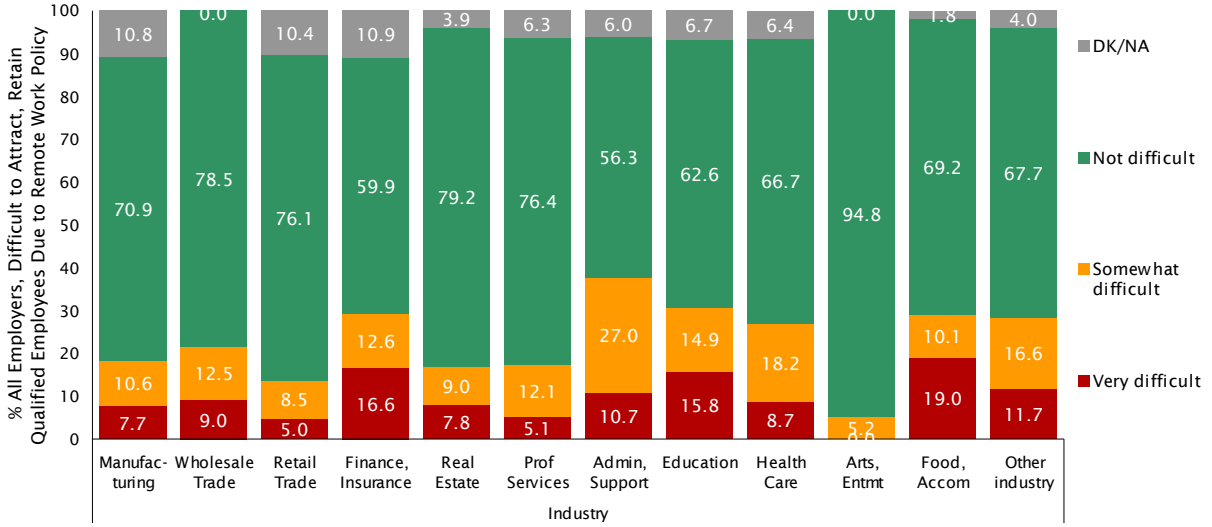


FIGURE 140 DIFFICULT TO ATTRACT, RETAIN QUALIFIED EMPLOYEES DUE TO REMOTE WORK POLICY BY NUMBER OF EMPLOYEES AT LOCATION, TIER 1 EMPLOYMENT CENTER, CURRENT REMOTE WORK OPTION & FUTURE REMOTE WORK OPTION

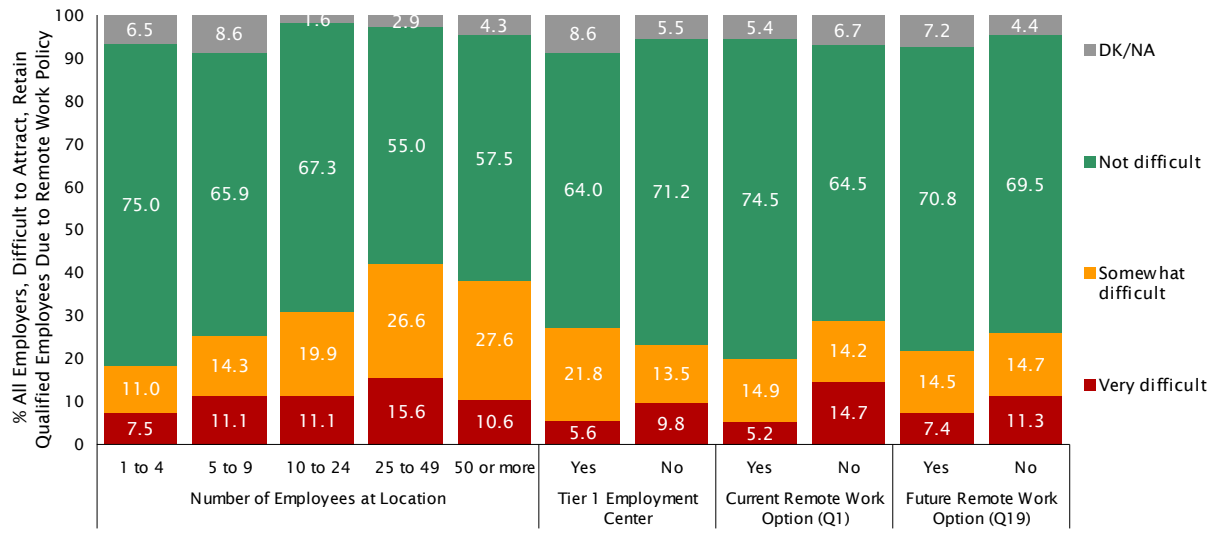
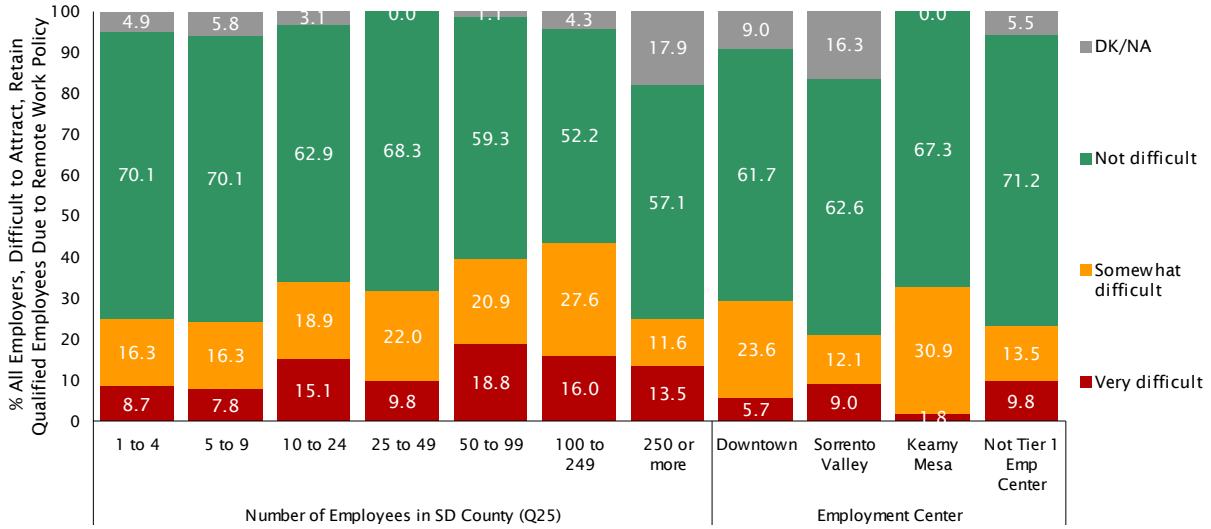


FIGURE 141 DIFFICULT TO ATTRACT, RETAIN QUALIFIED EMPLOYEES DUE TO REMOTE WORK POLICY BY NUMBER OF EMPLOYEES IN SD COUNTY & EMPLOYMENT CENTER



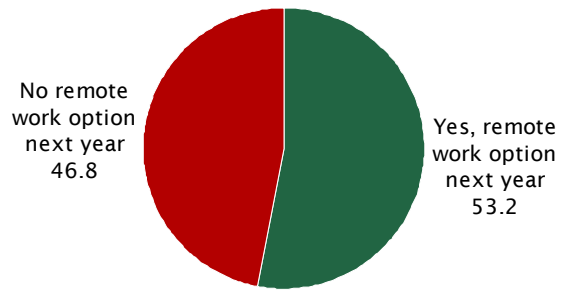
BUSINESSES: 2024 EXPECTATIONS

The final substantive section of the 2023 tracking survey asked respondents to look one year into the future (2024) and relay their expectations with respect to their company's remote work policies and practices.

WILL A REMOTE WORK OPTION BE GIVEN? Approximately 57% of businesses surveyed in 2023 indicated that they *currently* provide the option to work from home to at least some of their employees. When asked about their expectations for the future—one year from now—the percentage of businesses in the San Diego region that expected to offer a remote work option to some employees declined slightly to 53% (Figure 142).

2023 Survey, Question 19 *Next, let me ask you about the future - one year from now. If you aren't sure about an answer, please give me your best estimate. One year from now, do you expect that some employees at your company will be given the option to work from home at least one day per week?*

FIGURE 142 EMPLOYEES WILL HAVE AN OPTION TO WORK FROM HOME AT LEAST 1 DAY PER WEEK NEXT YEAR



Businesses in the finance, insurance, and professional services industries, those in Tier 1 Employment Centers, and businesses that currently offer a remote work option were the most likely to anticipate offering a remote work option to some employees in 2024 (see Figures 143-145).

FIGURE 143 EMPLOYEES WILL HAVE AN OPTION TO WORK FROM HOME AT LEAST 1 DAY PER WEEK NEXT YEAR BY INDUSTRY

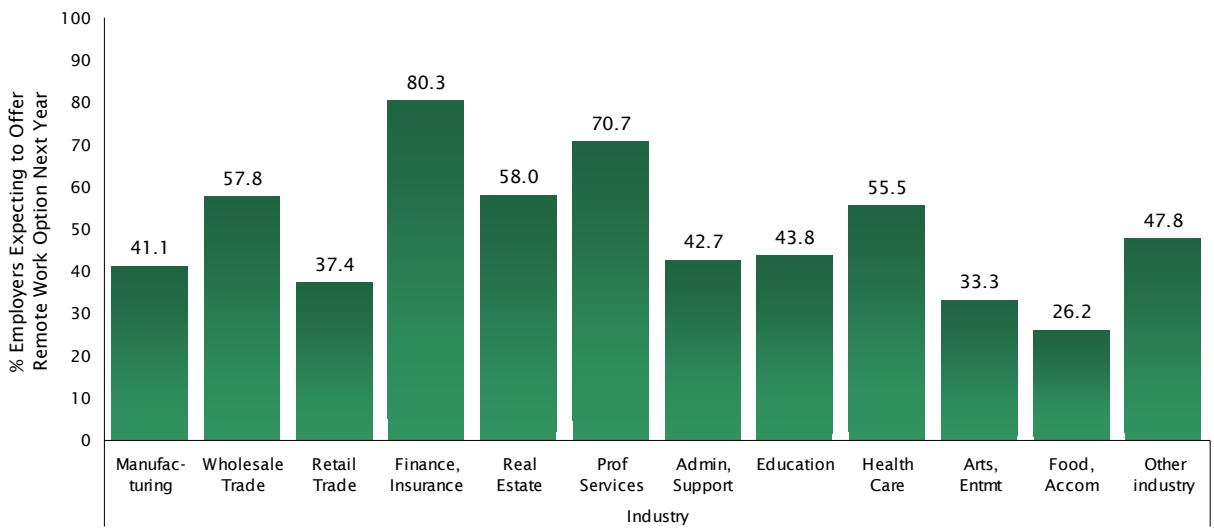


FIGURE 144 EMPLOYEES WILL HAVE AN OPTION TO WORK FROM HOME AT LEAST 1 DAY PER WEEK NEXT YEAR BY NUMBER OF EMPLOYEES AT LOCATION, TIER 1 EMPLOYMENT CENTER & CURRENT REMOTE WORK OPTION

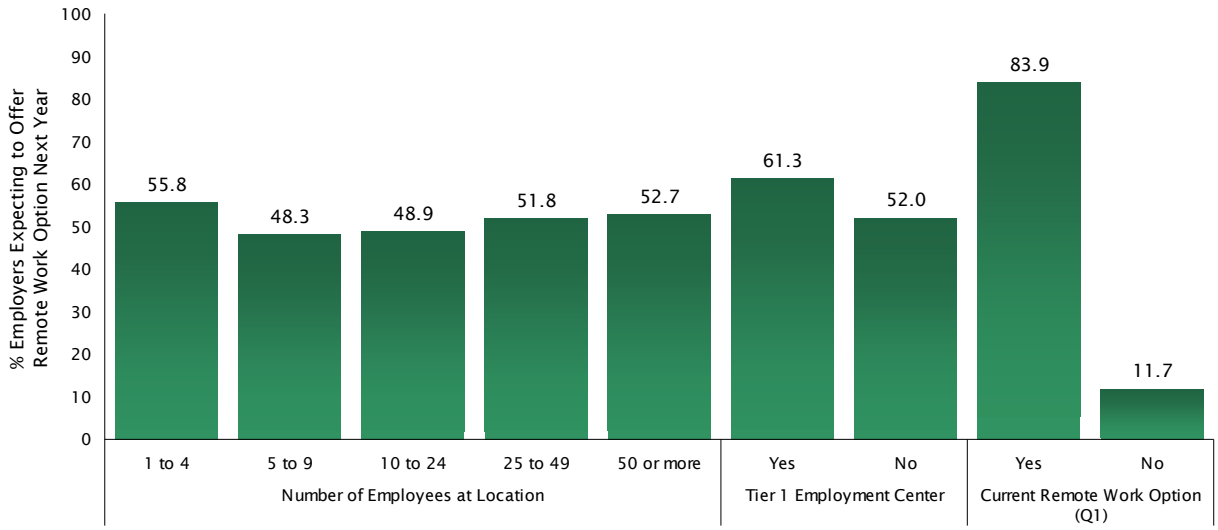
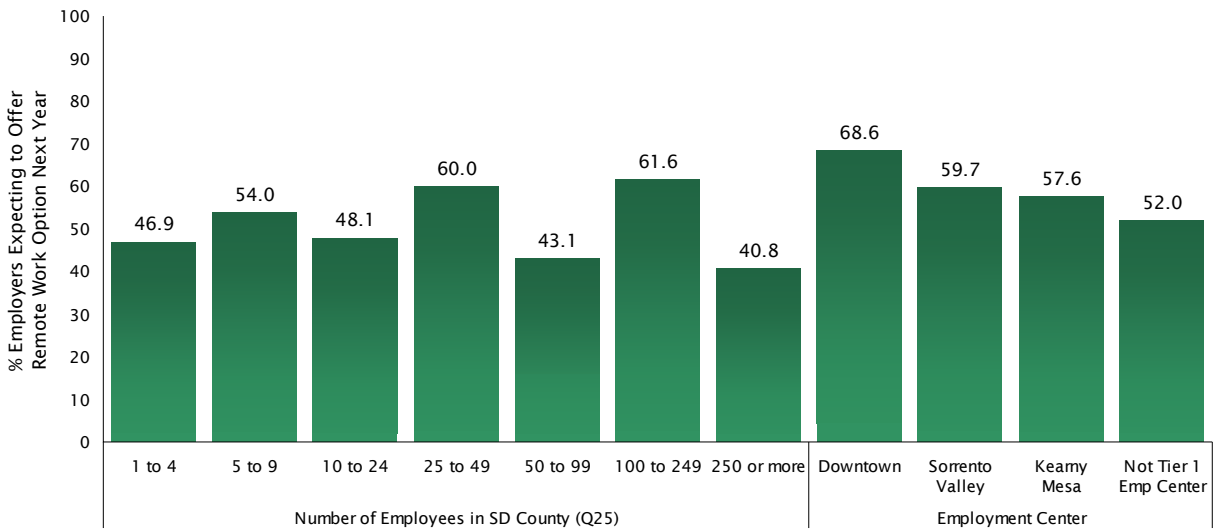


FIGURE 145 EMPLOYEES WILL HAVE AN OPTION TO WORK FROM HOME AT LEAST 1 DAY PER WEEK NEXT YEAR BY NUMBER OF EMPLOYEES IN SD COUNTY & EMPLOYMENT CENTER

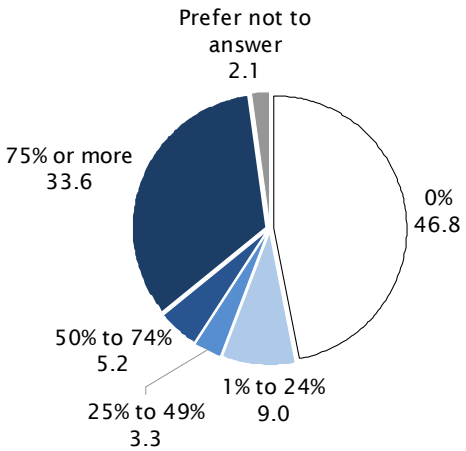


PERCENTAGE OF EMPLOYEES EXPECTED WITH REMOTE WORK OPTION

Businesses that indicated they expected to offer some employees the option to work remotely at least one day per week in 2024 were subsequently asked to estimate the percentage of their company's employees that will be given the option to work remotely. Forty-seven percent (47%) of San Diego businesses indicated they did *not* expect to offer a remote work option, while the remainder were split between those who expected to offer it to less than one-quarter of employees (9%), 25% to 49% of their workforce (3%), 50% to 74% of employees (5%), and three-quarters or more of their workforce (34%). Overall, the percentage of businesses that expected to provide a remote work option to at least three-quarters of their employees in 2024 was 3% lower than the current level (2023) among these same businesses.

2023 Survey, Question 20 *One year from now, approximately what percentage of your company's employees do you expect will have the option to work from home at least one day per week?*

FIGURE 146 PERCENTAGE OF EMPLOYEES WHO WILL HAVE AN OPTION TO WORK FROM HOME AT LEAST 1 DAY PER WEEK NEXT YEAR



Figures 147-149 show how anticipated remote work offerings in 2024 varied by industry, number of employees at their location, Tier 1 Employment Center status, whether they currently offer a remote work option to at least some employees, number of employees in the San Diego region, and specific employment center. Here again, there is a pronounced, inverse relationship between company size and willingness to offer a remote work option to 75% or more of employees.

FIGURE 147 PERCENTAGE OF EMPLOYEES WHO WILL HAVE AN OPTION TO WORK FROM HOME AT LEAST 1 DAY PER WEEK NEXT YEAR BY OVERALL & INDUSTRY

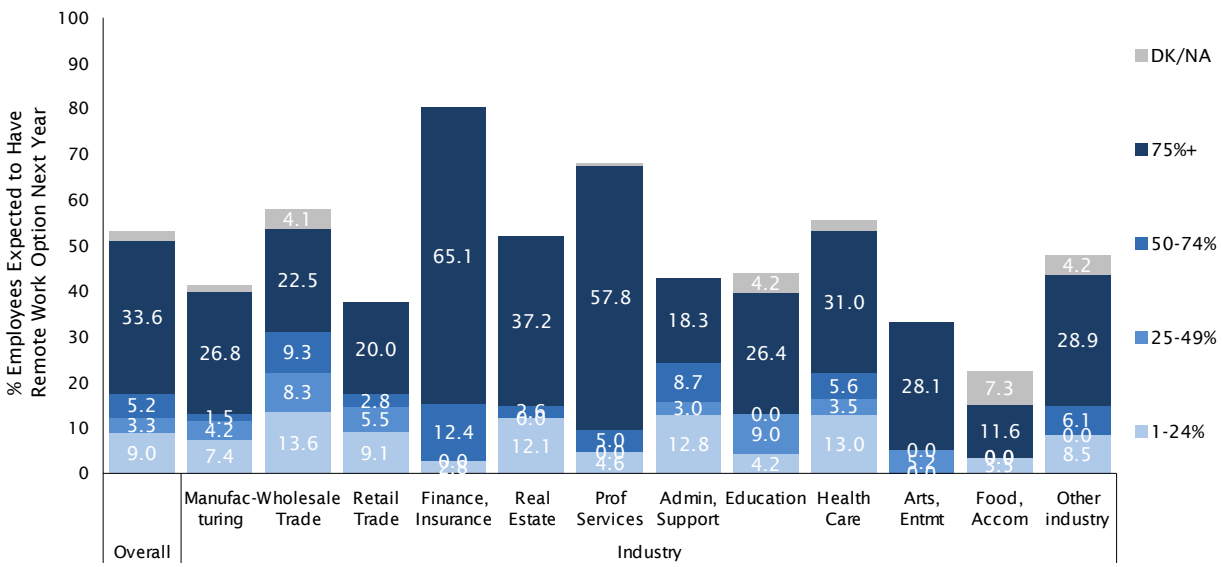


FIGURE 148 PERCENTAGE OF EMPLOYEES WHO WILL HAVE AN OPTION TO WORK FROM HOME AT LEAST 1 DAY PER WEEK NEXT YEAR BY NUMBER OF EMPLOYEES AT LOCATION, TIER 1 EMPLOYMENT CENTER & CURRENT REMOTE WORK OPTION

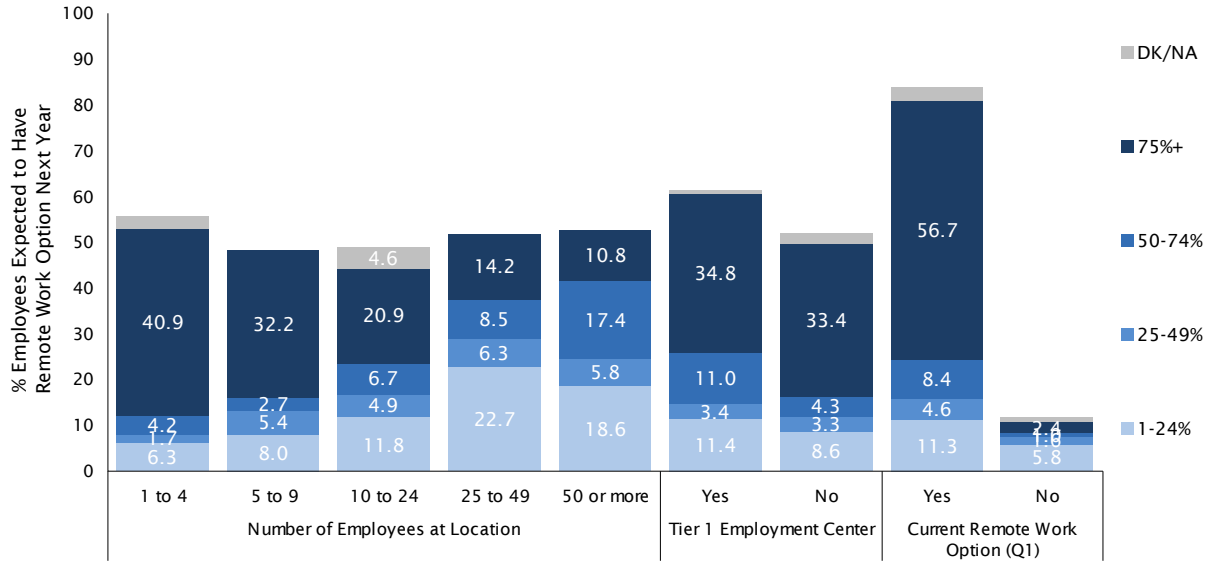
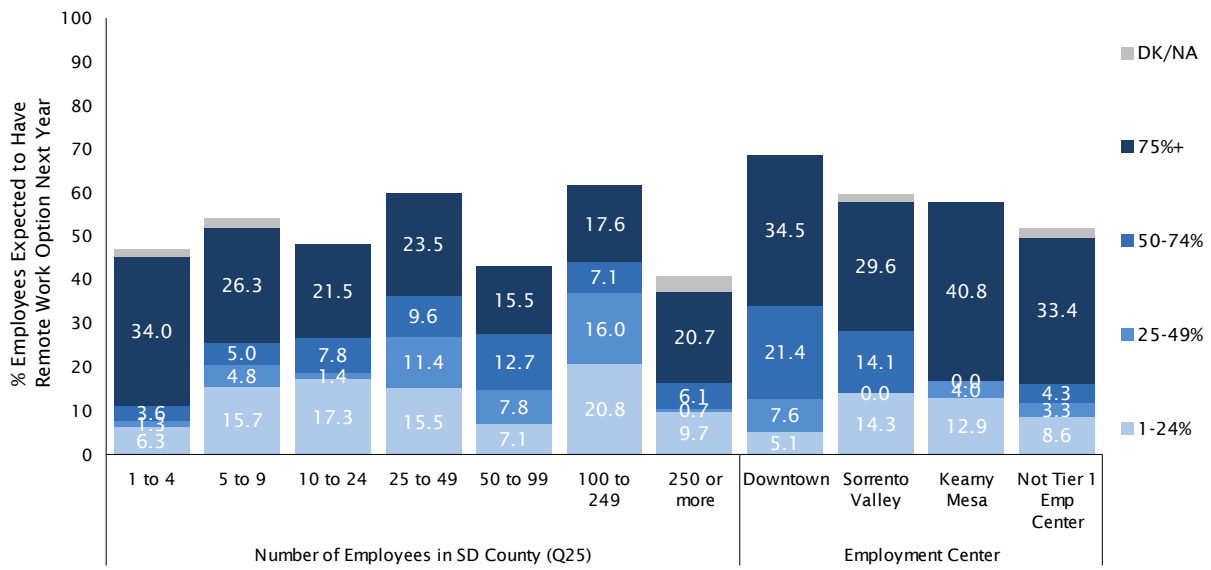


FIGURE 149 PERCENTAGE OF EMPLOYEES WHO WILL HAVE AN OPTION TO WORK FROM HOME AT LEAST 1 DAY PER WEEK NEXT YEAR BY NUMBER OF EMPLOYEES IN SD COUNTY & EMPLOYMENT CENTER

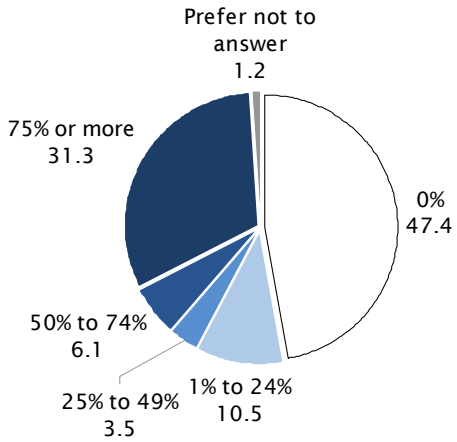


PERCENTAGE OF EMPLOYEES TO WORK REMOTELY 1+ DAYS PER WEEK

Just over half (53%) of businesses indicated in 2023 they expected to offer a remote work option to some employees in 2024. The percentage that expected to have one or more employees actually working from home at least one day per week in 2024 was similar (51%). In other words, nearly all businesses that anticipated offering a remote work option in 2024 expected at least one employee to take advantage of the offer. Approximately 31% of businesses expected that 75% or more of their employees would work from home at least one day per week in 2024, with the remainder divided as follows: 50% to 74% of workforce (6%), 25% to 49% of workforce (4%), and 1% to 24% of workforce (11%).

2023 Survey, Question 21 *One year from now, approximately what percentage of your company's employees do you expect will actually work from home at least one day per week?*

FIGURE 150 PERCENTAGE OF EMPLOYEES EXPECTED TO WORK FROM HOME AT LEAST 1 DAY PER WEEK NEXT YEAR



When compared to their counterparts, businesses in finance, insurance, and professional services industries, those with less than five employees at their location, businesses that currently offer some employees a remote work option, and those in the Kearny Mesa Employment Center were the most likely to anticipate that 75% or more of their workforce would be working remotely at least one day per week in 2024 (see Figures 151-153).

FIGURE 151 PERCENTAGE OF EMPLOYEES EXPECTED TO WORK FROM HOME AT LEAST 1 DAY PER WEEK NEXT YEAR BY OVERALL & INDUSTRY

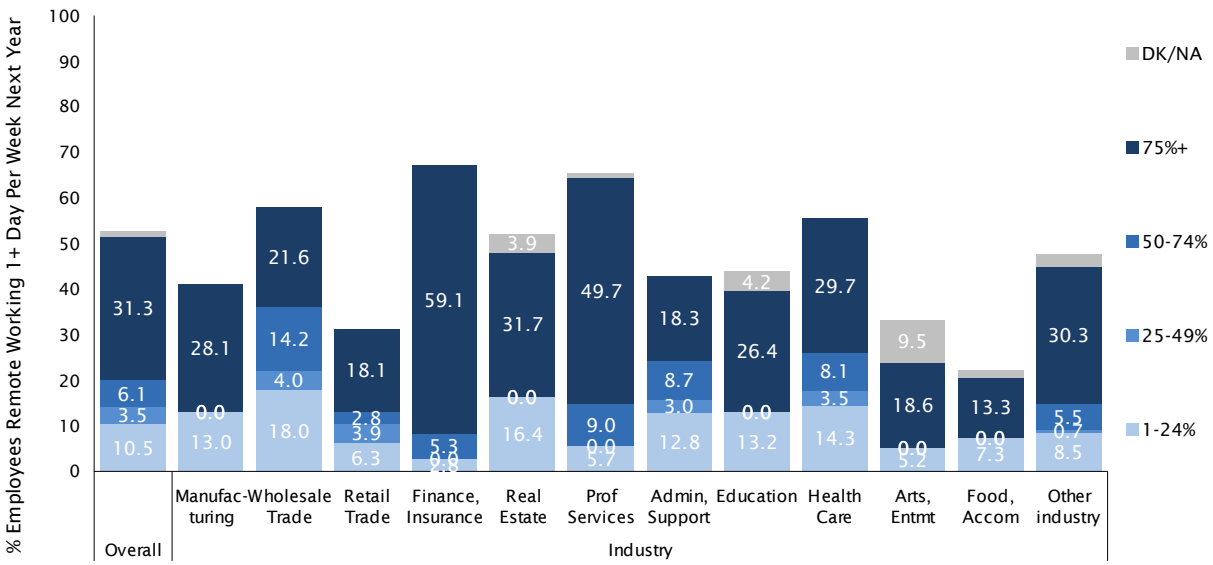


FIGURE 152 PERCENTAGE OF EMPLOYEES EXPECTED TO WORK FROM HOME AT LEAST 1 DAY PER WEEK NEXT YEAR BY NUMBER OF EMPLOYEES AT LOCATION, TIER 1 EMPLOYMENT CENTER & CURRENT REMOTE WORK OPTION

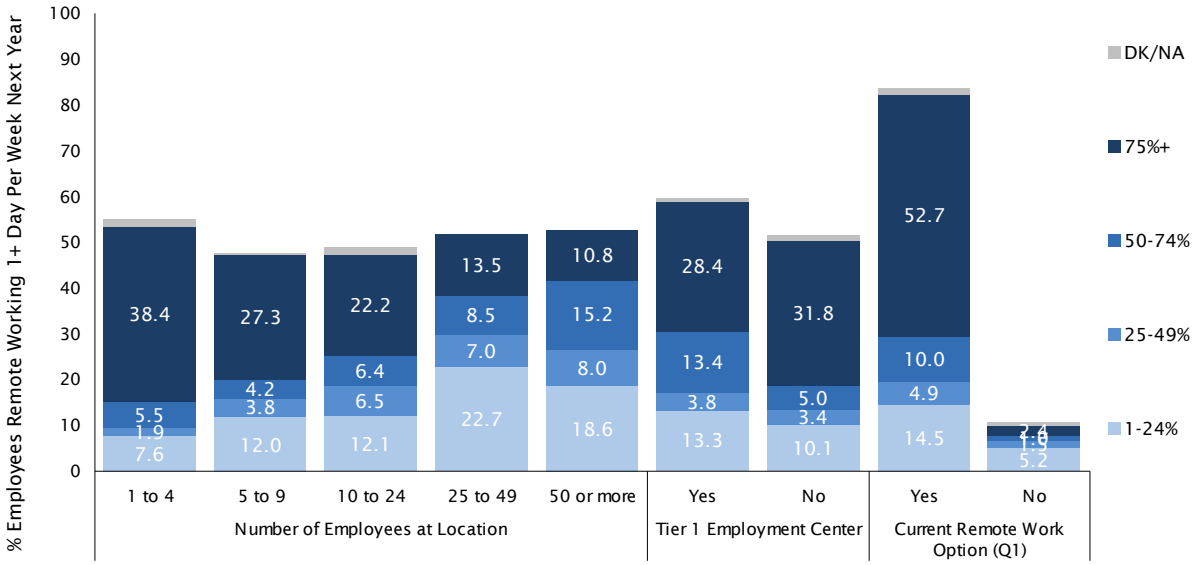
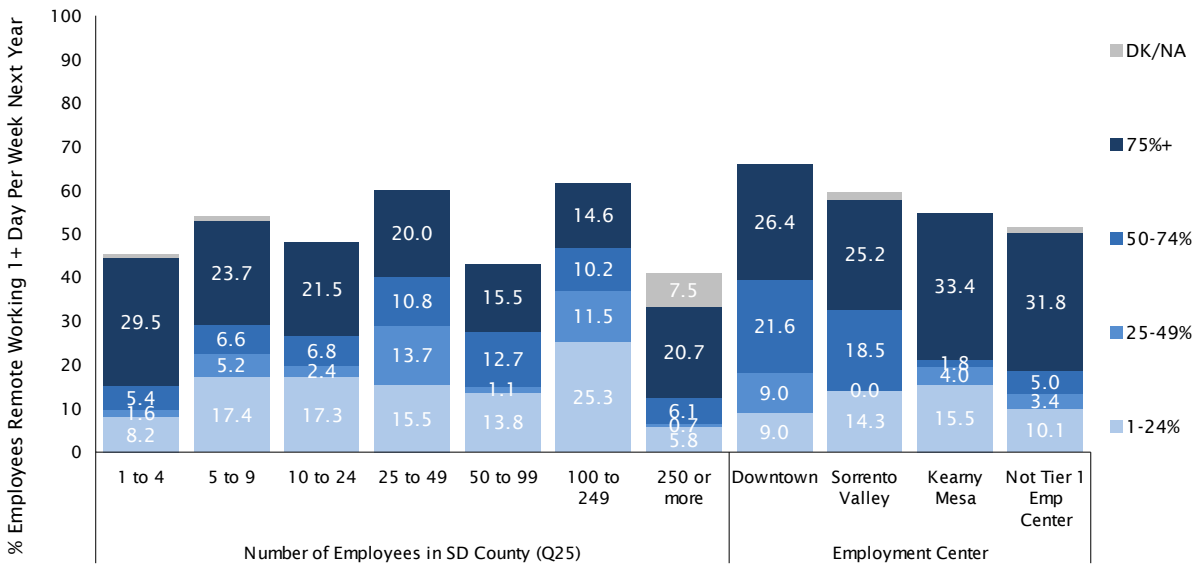


FIGURE 153 PERCENTAGE OF EMPLOYEES EXPECTED TO WORK FROM HOME AT LEAST 1 DAY PER WEEK NEXT YEAR BY NUMBER OF EMPLOYEES IN SD COUNTY & EMPLOYMENT CENTER



PERCENTAGE OF EMPLOYEES TO WORK REMOTELY 3+ DAYS PER WEEK

When asked in 2023, more than half of businesses in the San Diego region (56%) expected to have no (zero) employees working from home at least three days per week in 2024 (see Figure 154). At the other end of the spectrum, 22% of businesses indicated they expected at least 75% of their workforce to work remotely most of the time in 2024. The remaining businesses were divided between those expecting 50% to 74% of their workforce (5%), 25% to 49% of their workforce (5%), and less than 25% of their workforce (10%) to work from home most of the time one year from now. Figures 155-157 show how these patterns varied across subgroups of businesses in the San Diego region.

2023 Survey, Question 22 *One year from now, approximately what percentage of your company's employees do you expect will work from home most of the time - at least three days per week?*

FIGURE 154 PERCENTAGE OF EMPLOYEES EXPECTED TO WORK FROM HOME MOST OF THE TIME NEXT YEAR

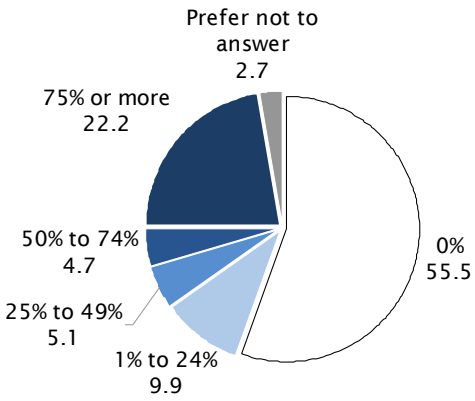


FIGURE 155 PERCENTAGE OF EMPLOYEES EXPECTED TO WORK FROM HOME MOST OF THE TIME NEXT YEAR BY OVERALL & INDUSTRY

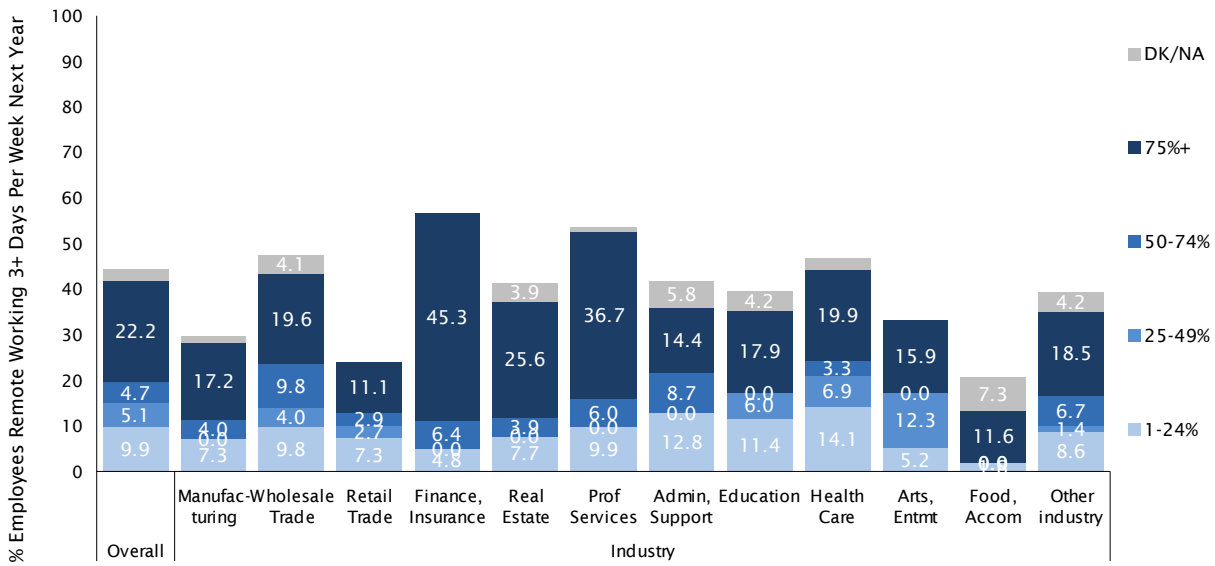


FIGURE 156 PERCENTAGE OF EMPLOYEES EXPECTED TO WORK FROM HOME MOST OF THE TIME NEXT YEAR BY NUMBER OF EMPLOYEES AT LOCATION, TIER 1 EMPLOYMENT CENTER & CURRENT REMOTE WORK OPTION

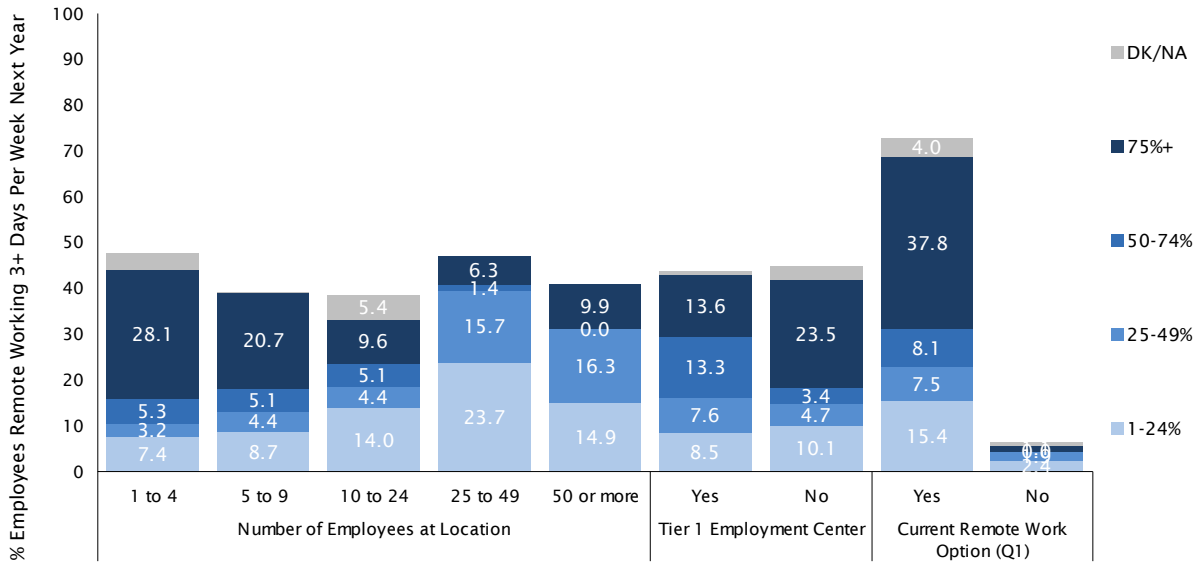
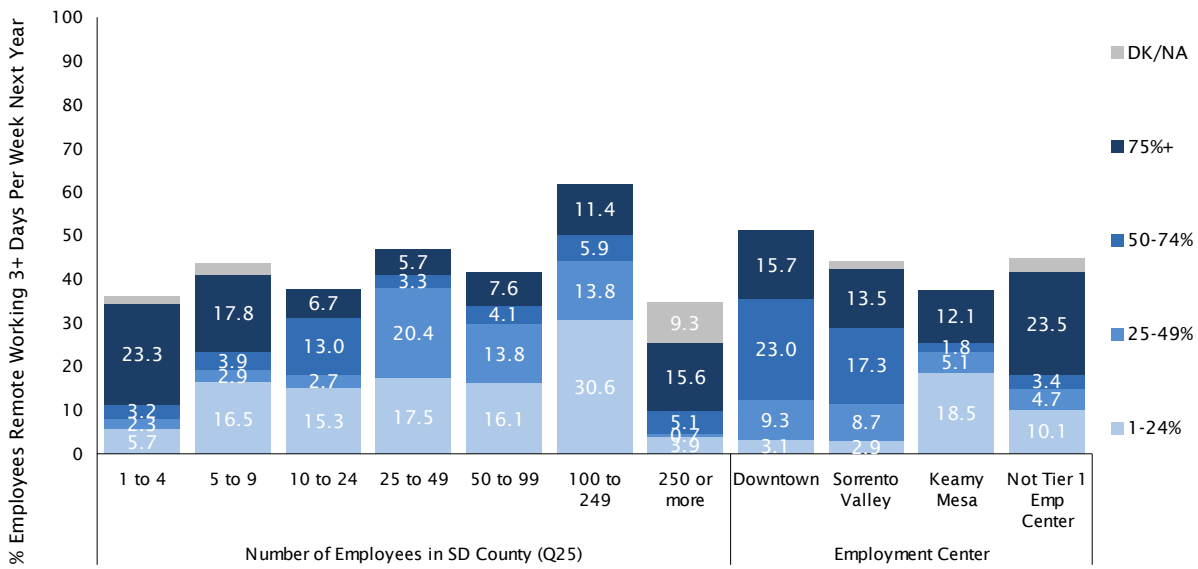


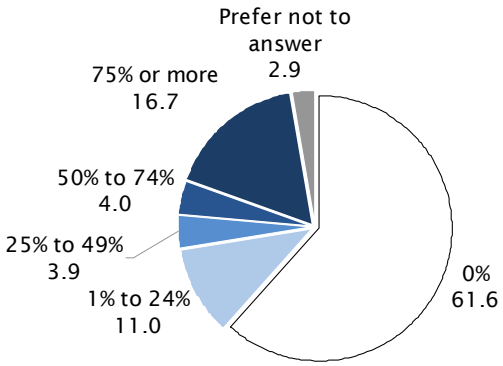
FIGURE 157 PERCENTAGE OF EMPLOYEES EXPECTED TO WORK FROM HOME MOST OF THE TIME NEXT YEAR BY NUMBER OF EMPLOYEES IN SD COUNTY & EMPLOYMENT CENTER



PERCENTAGE OF EMPLOYEES TO WORK REMOTELY 100% OF TIME Although most businesses (51%) expected to offer employees the option to work remotely from home at least one day per week in 2024, the percentage that anticipated one or more employees would work from home *full-time* next year was significantly smaller (36%). Sixty-two percent of businesses (62%) anticipated that they would have no employees (0%) that work from home everyday of the week in 2024. Among the remaining businesses, 17% expected that at least three-quarters of their employees will work from home every day, 4% expected 50% to 74% do so, 4% anticipated that 25% to 49% of their workforce will work from home every day, while 11% offered that less than one-quarter of their employees are expected to always work from home in 2024 (see Figure 158).

2023 Survey, Question 23 *One year from now, approximately what percentage of your company's employees will always work from home? In other words, they work from home every work day.*

FIGURE 158 PERCENTAGE OF EMPLOYEES EXPECTED TO WORK FROM HOME ALL OF THE TIME NEXT YEAR



The percentage of businesses that anticipated at least three-quarters of their workforce to always work from home in 2024 was highest among those in the finance, insurance, and professional services industries, businesses with less than five employees at their location, businesses not located in a Tier 1 Employment Center, and those that currently offer some employees the option to work from home at least one day per week (Figures 159-161).

FIGURE 159 PERCENTAGE OF EMPLOYEES EXPECTED TO WORK FROM HOME ALL OF THE TIME NEXT YEAR BY OVERALL & INDUSTRY

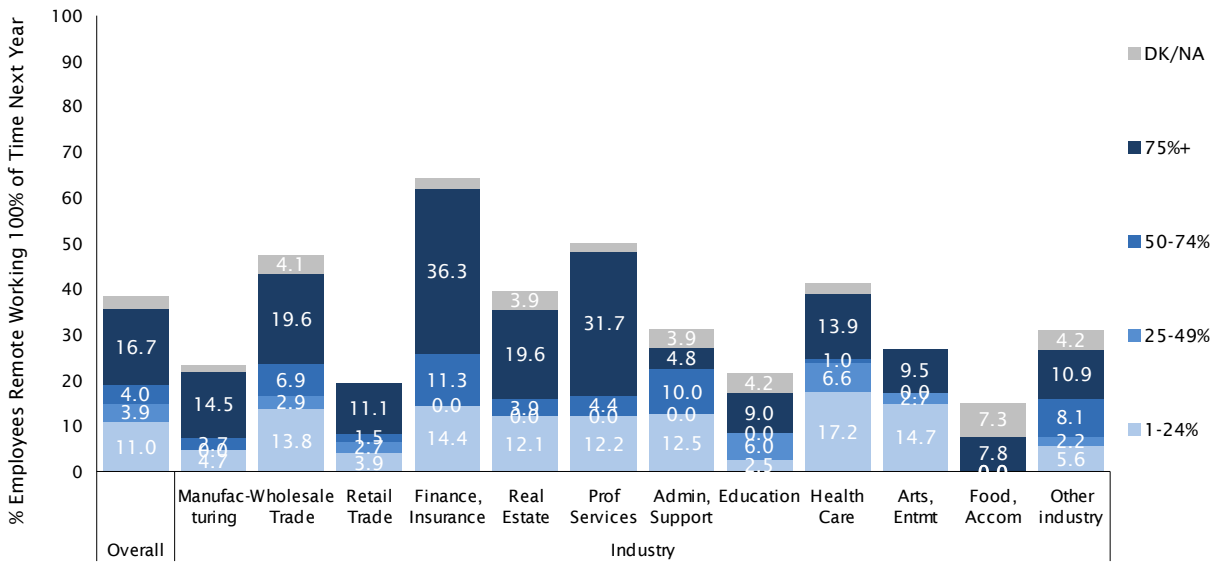


FIGURE 160 PERCENTAGE OF EMPLOYEES EXPECTED TO WORK FROM HOME ALL OF THE TIME NEXT YEAR BY NUMBER OF EMPLOYEES AT LOCATION, TIER 1 EMPLOYMENT CENTER & CURRENT REMOTE WORK OPTION

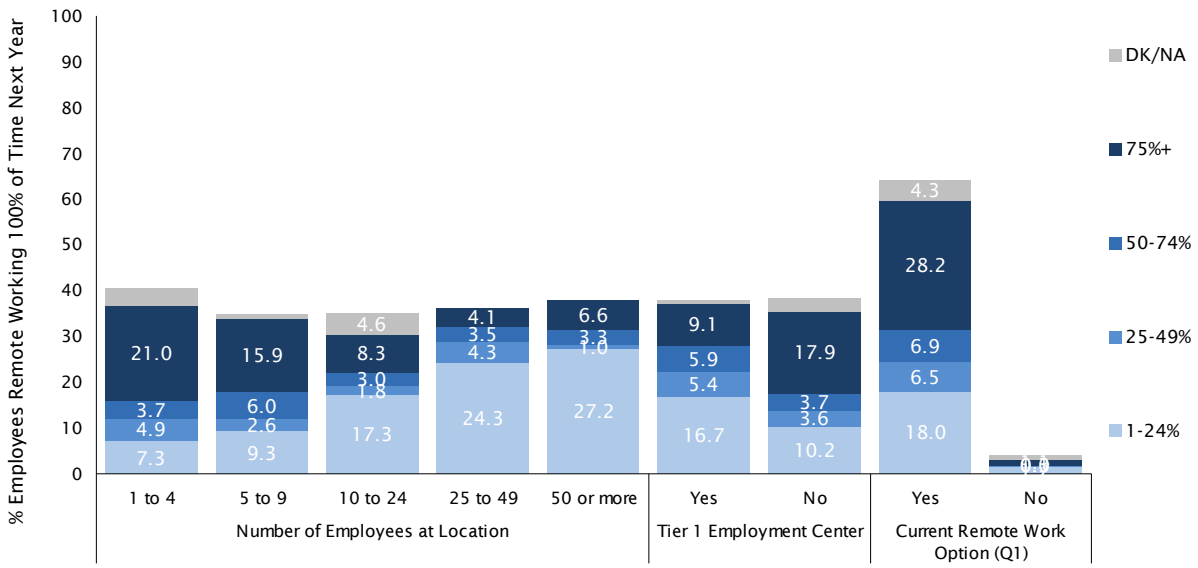
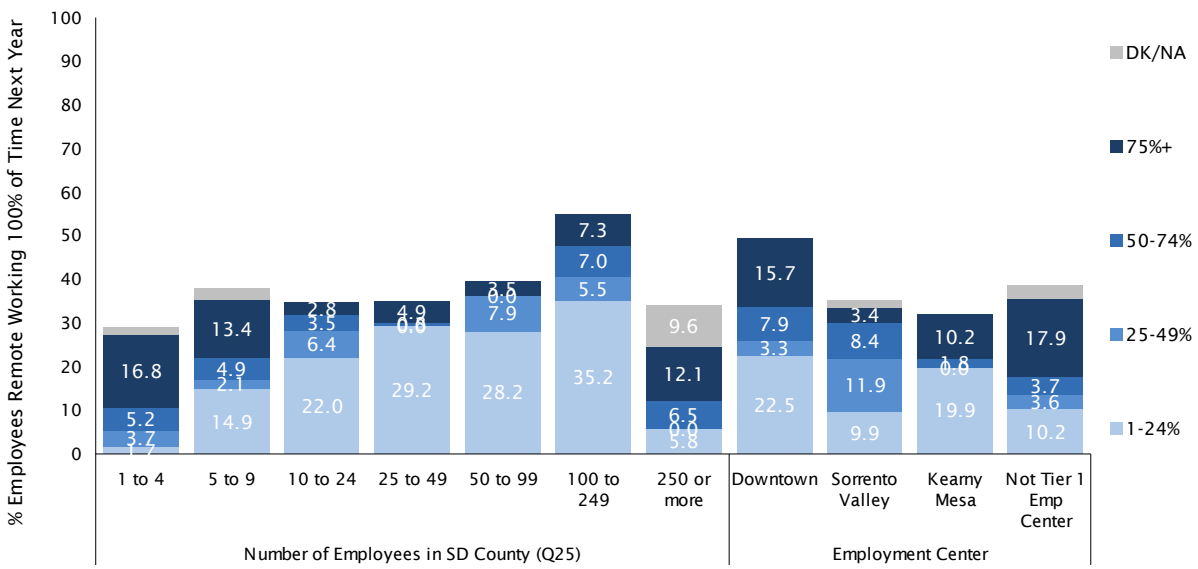


FIGURE 161 PERCENTAGE OF EMPLOYEES EXPECTED TO WORK FROM HOME ALL OF THE TIME NEXT YEAR BY NUMBER OF EMPLOYEES IN SD COUNTY & EMPLOYMENT CENTER



WILL REMOTE WORK BE MANDATORY FOR SOME EMPLOYEES IN 2024? The final substantive question of the 2023 tracking survey of businesses asked employers who expected to offer a remote work option to employees in 2024 whether working from home will be *mandatory* for some employees. In other words, will some employees be *required* to work from home at least some of the time? Across the region, approximately 19% of businesses expected that remote work would be mandatory for a portion of their workforce (see Figure 162). Figures 163-165 show how the percentage of businesses anticipating mandatory remote work arrangements for some employees in 2024 varied across subgroups.

2023 Survey, Question 24 *One year from now, will working from home be mandatory for any employees? In other words, will some employees be required to work from home at least some of the time?*

FIGURE 162 EMPLOYEES REQUIRED TO WORK FROM HOME NEXT YEAR

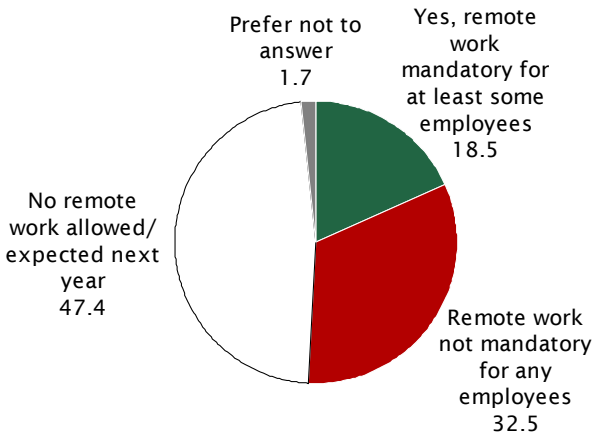


FIGURE 163 EMPLOYEES REQUIRED TO WORK FROM HOME NEXT YEAR BY INDUSTRY

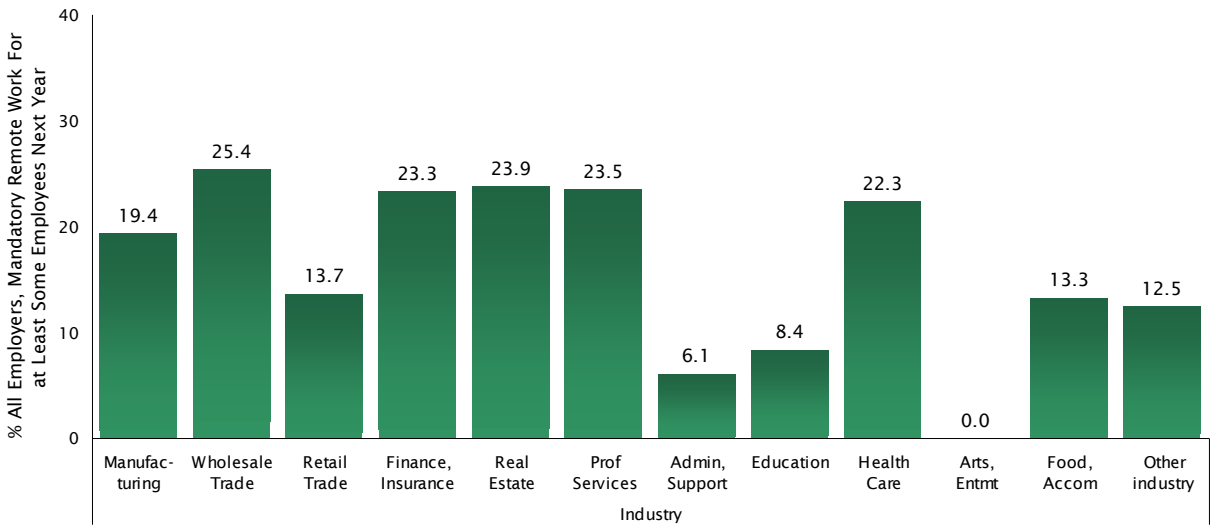


FIGURE 164 EMPLOYEES REQUIRED TO WORK FROM HOME NEXT YEAR BY NUMBER OF EMPLOYEES AT LOCATION, TIER 1 EMPLOYMENT CENTER & CURRENT REMOTE WORK OPTION

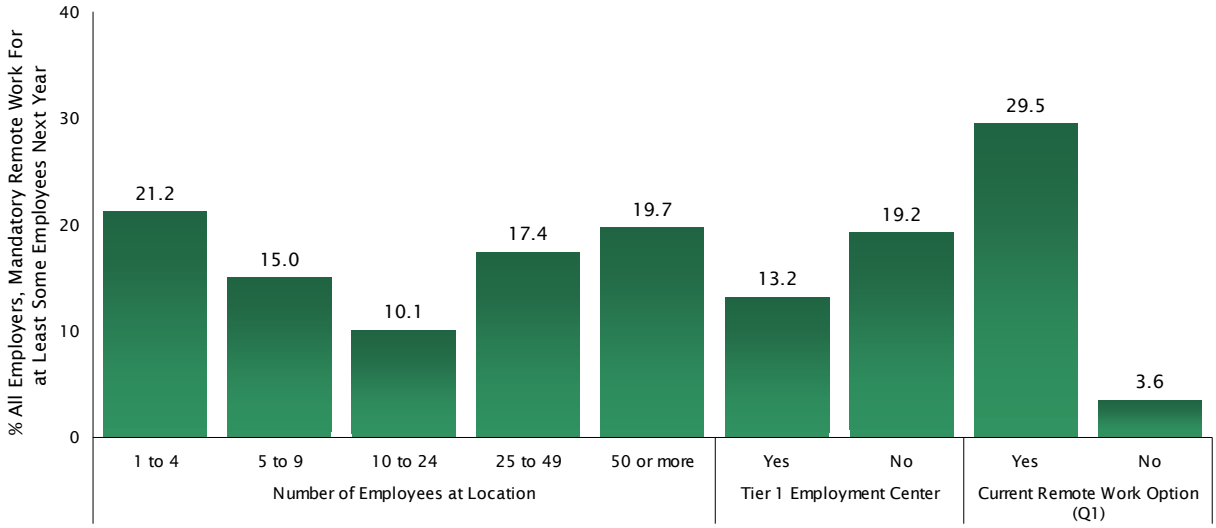
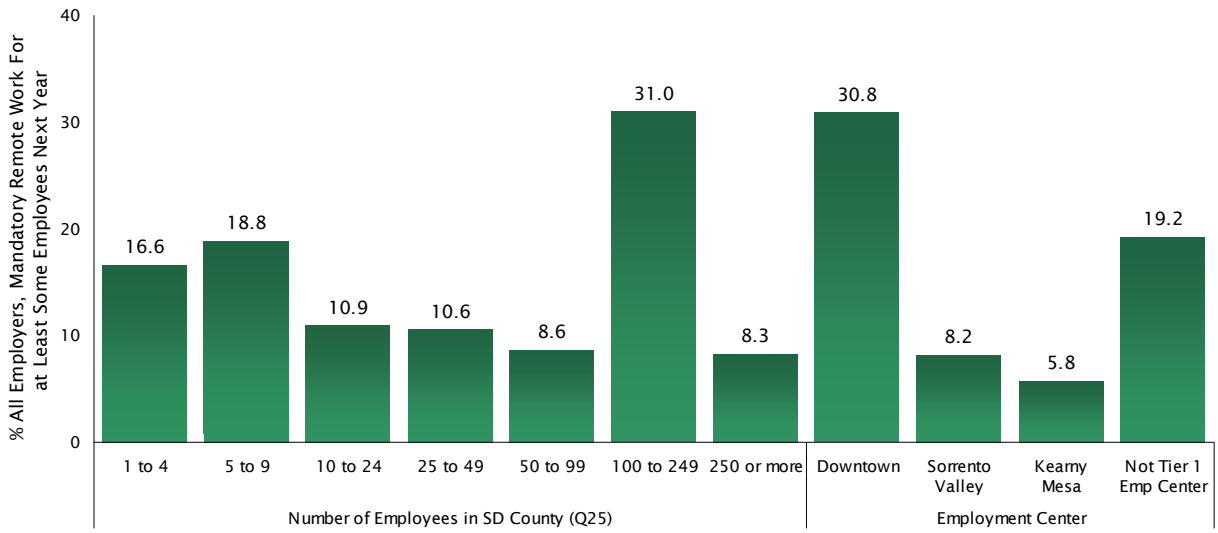


FIGURE 165 EMPLOYEES REQUIRED TO WORK FROM HOME NEXT YEAR BY NUMBER OF EMPLOYEES IN SD COUNTY & EMPLOYMENT CENTER



EMPLOYEES: PRE-PANDEMIC

Similar to the structure of the baseline Business Survey, the opening series of questions in the 2021 Employee Survey focused on employees' work arrangements and commute mode *prior* to the pandemic, in January and February 2020.

WORK DAYS & REMOTE WORK PATTERNS

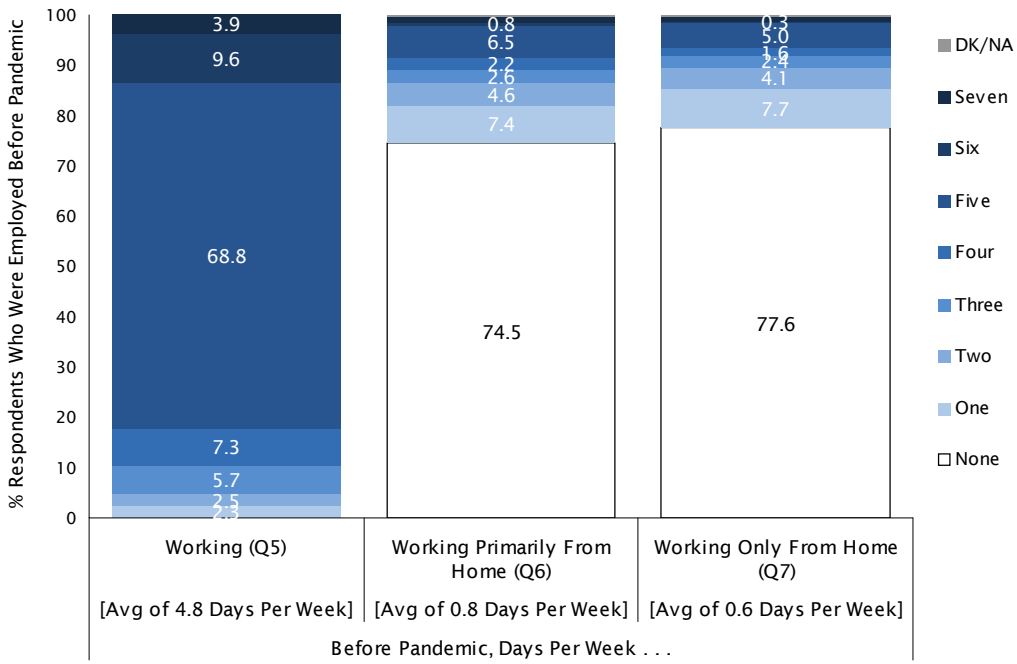
After being screened to confirm they were *currently* employed, all respondents were asked to describe their work arrangements before the pandemic started in terms of days worked, days they primarily worked from home, and split days (primarily worked from home, but *also* commuted to a separate work site) during a typical week. Figure 166 summarizes the findings of all three questions among respondents surveyed in 2021 who were employed prior to the pandemic.[15]

2021 Survey, Question 4 *Before the pandemic started, how many days per week did you typically work?*

2021 Survey, Question 5 *Of the <insert from Q4> work days per week you typically worked, how many of these days did you primarily work from home?*

2021 Survey, Question 6 *Of the <insert from Q5> days you primarily worked from home, how many days did you typically work from home the entire day without commuting to a separate work site?*

FIGURE 166 WORK DAYS AND LOCATION BEFORE PANDEMIC, PER WEEK[16]



15. Nine percent of respondents who were employed at the time of the survey (during the pandemic) were not employed prior to the pandemic.

Prior to the pandemic, two-thirds of employees (69%) reported that they worked five days per week, and an additional 14% reported that they worked *more* than five days per week. Approximately 13% indicated they worked three to four days in a typical week prior to the pandemic, while just 5% were employed one or two days per week. On average, employees reported working 4.8 days per week prior to the pandemic.

Of those employed prior to the pandemic, three-quarters (75%) indicated that they did not work from home before the pandemic began, and those who did work from home were fairly evenly split between those who did so one to two days per week (12%) and those who worked from home three or more days per week (14%). Averaging across *all* employees, the average number of days worked from home in a typical week prior to the pandemic was 0.8 days.

From a trip-generation perspective, it was also of interest to document *split* days—days where an employee primarily works from home, but also commutes to a separate work site for some portion of the day. Accordingly, respondents were asked to report how many days in a typical week they worked from home the entire day without commuting to a separate work site. As shown in the far right column of Figure 166, adding this condition reduced the percentage of employees reporting one or more days working from home in a typical week by 3%. Averaging across *all* employees, the average number of days worked exclusively from home in a typical week prior to the pandemic was 0.6 days.

For the interested reader, Figures 167-170 present the average number of days worked, average days worked primarily from home, and average days worked exclusively from home across various subgroups of employees. Independent contractors, those working for companies with a small workforce at their location (less than 5), and those working in finance and insurance, real estate, professional services, and arts and entertainment reported the highest average number of remote work days during the pre-pandemic period.

16.The average days working primarily from home and working only from home shown in this figure are averages across *all* employees, including those who worked no (zero) days from home.

FIGURE 167 WORK DAYS AND LOCATION BEFORE PANDEMIC PER WEEK BY AGE, GENDER, INDEPENDENT CONTRACTOR & SURVEY LANGUAGE

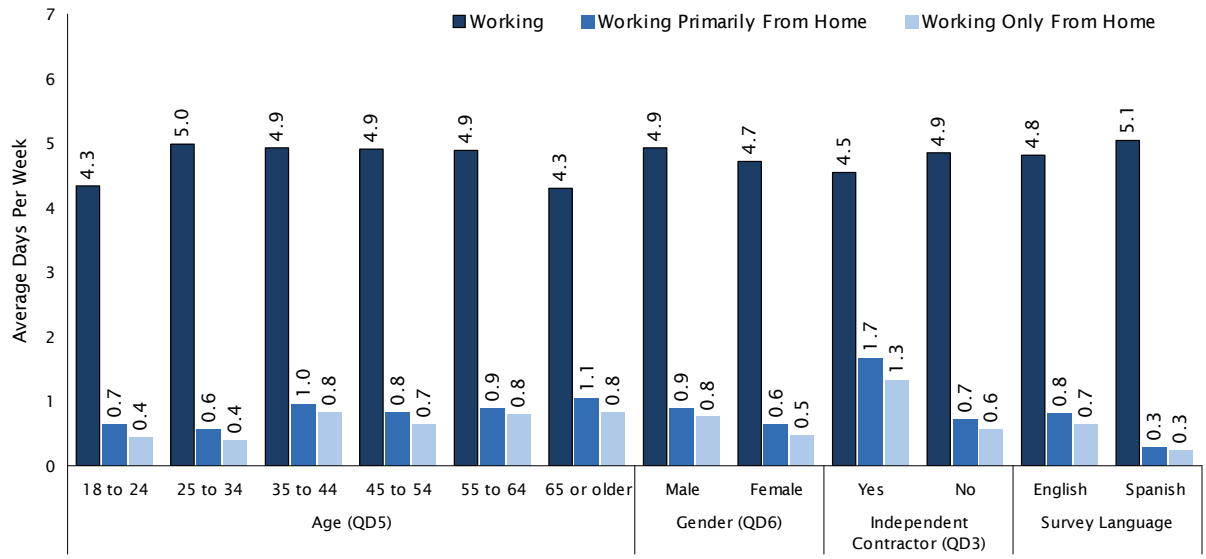


FIGURE 168 WORK DAYS AND LOCATION BEFORE PANDEMIC PER WEEK BY ETHNICITY & HOUSEHOLD INCOME

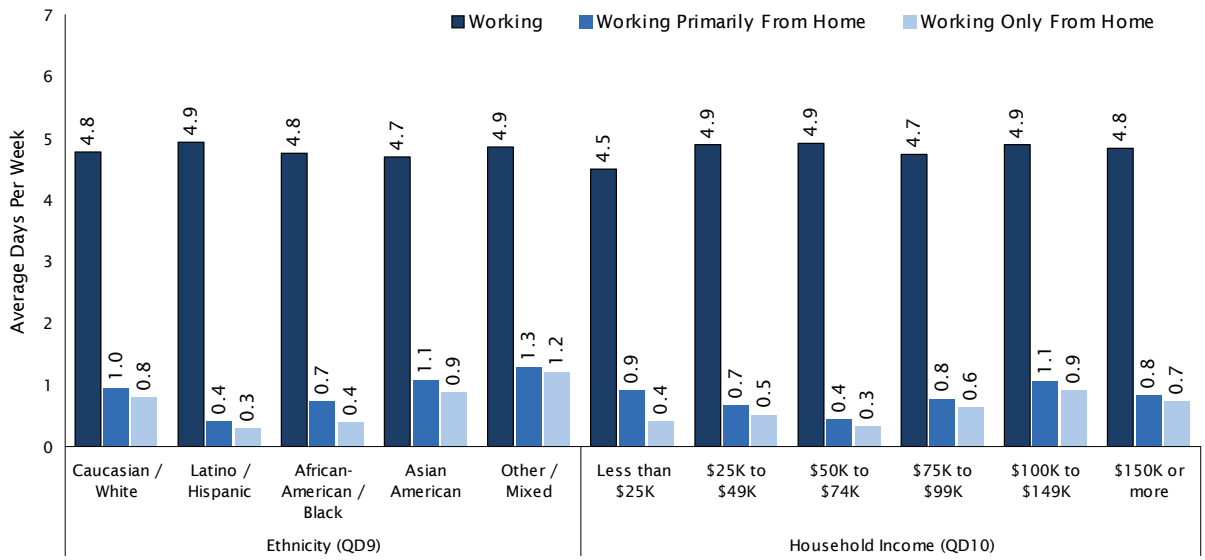


FIGURE 169 WORK DAYS AND LOCATION BEFORE PANDEMIC PER WEEK BY SAN DIEGO COUNTY SUBREGION & NUMBER OF EMPLOYEES AT COMPANY

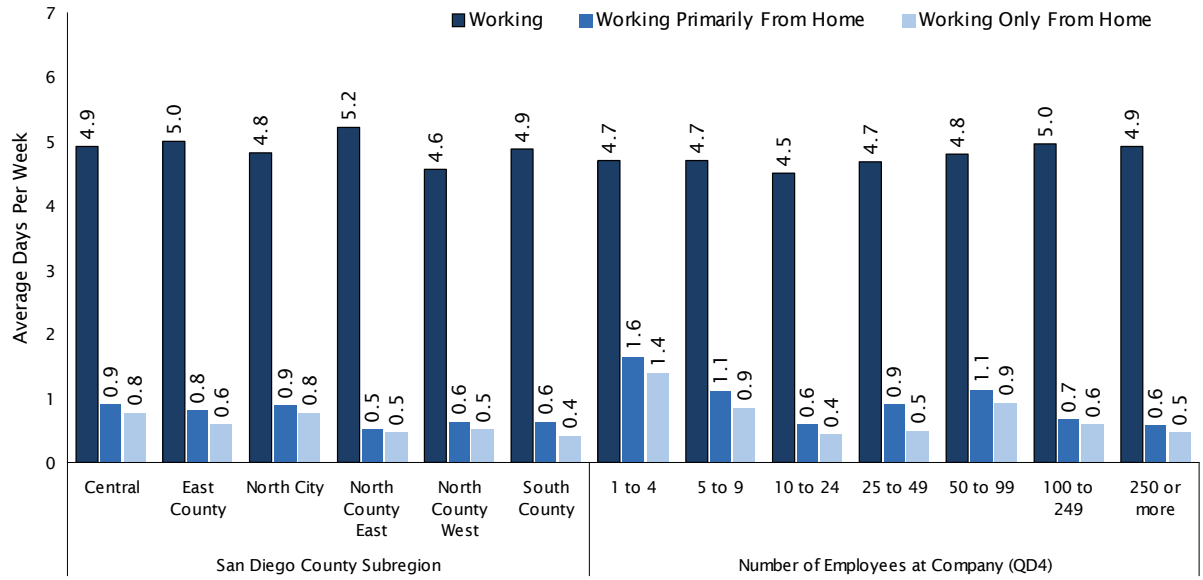


FIGURE 170 WORK DAYS AND LOCATION BEFORE PANDEMIC PER WEEK BY INDUSTRY[17]

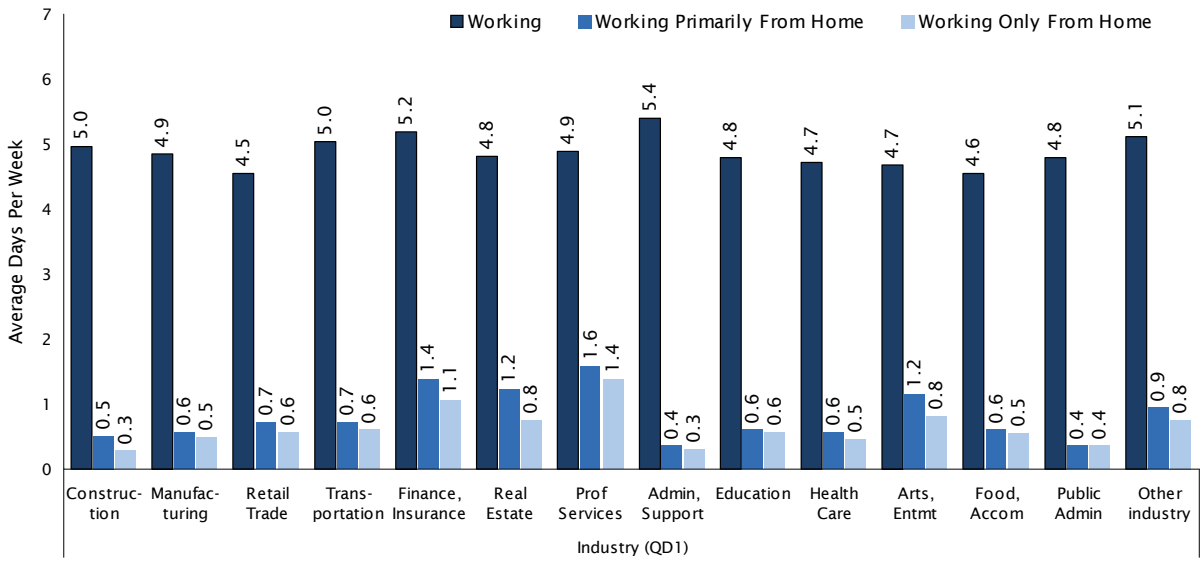


Figure 171 summarizes employees' work patterns during the pre-pandemic period, documenting the percentage of employees who fit into specific work arrangement categories. Overall, 68% of employees surveyed indicated they did *not* work from home prior to the pandemic, 9% were unemployed in January and February 2020, 8% worked exclusively from home, and 15% worked from home in some capacity (partial). Those who worked from home on a partial basis can be

17.For the Employee Survey, *other industries* include the NAICS categories: other services (except public administration), information, utilities, wholesale trade, and agriculture. These industries are grouped together for the purposes of this report because the number of employees surveyed in each industry was insufficient to present the industry by itself.

further divided into those who worked exclusively at home some days and exclusively at an office other days (8%), those who worked from home all days of the week, but split some days at the office for a few hours (3%), and those who worked a mix of days at home, at the office, and split days (5%). Figures 172-175 show how various subgroups of employees were distributed among the main work arrangement categories, pre-pandemic.

FIGURE 171 REMOTE WORK STATUS BEFORE PANDEMIC

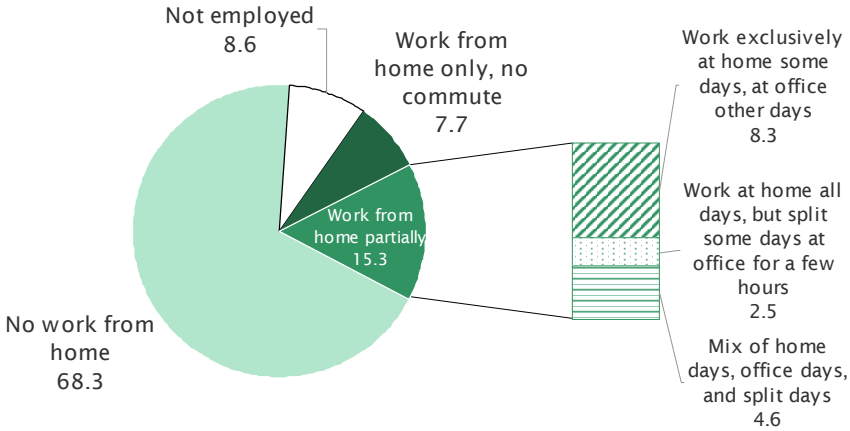


FIGURE 172 REMOTE WORK STATUS BEFORE PANDEMIC BY AGE, GENDER, INDEPENDENT CONTRACTOR & SURVEY LANGUAGE

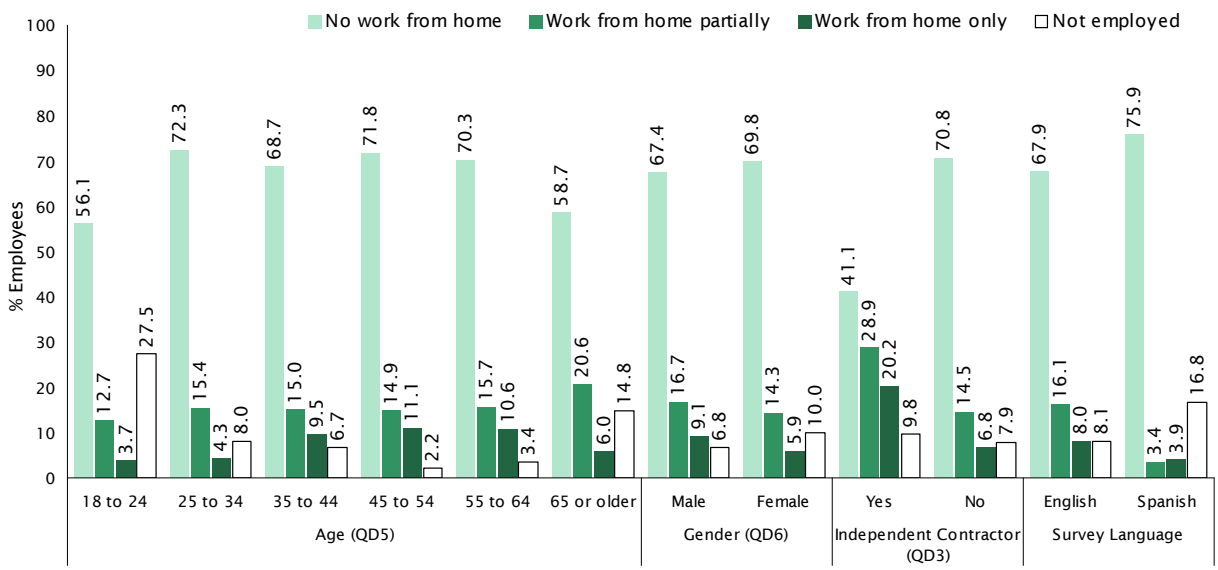


FIGURE 173 REMOTE WORK STATUS BEFORE PANDEMIC BY ETHNICITY & HOUSEHOLD INCOME

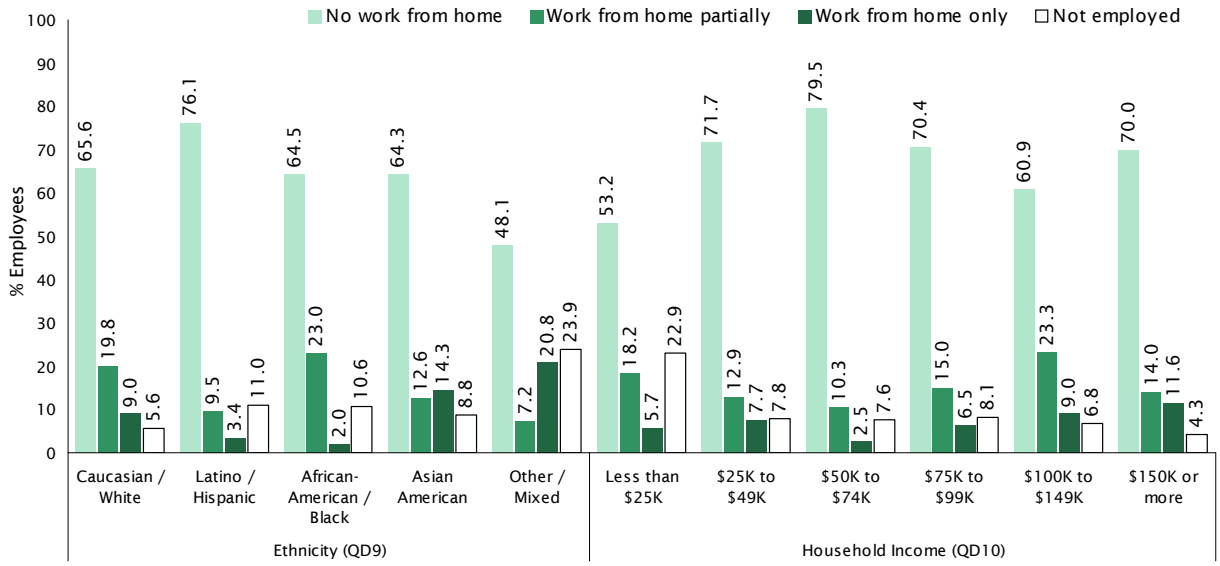


FIGURE 174 REMOTE WORK STATUS BEFORE PANDEMIC BY SAN DIEGO COUNTY SUBREGION & NUMBER OF EMPLOYEES AT COMPANY

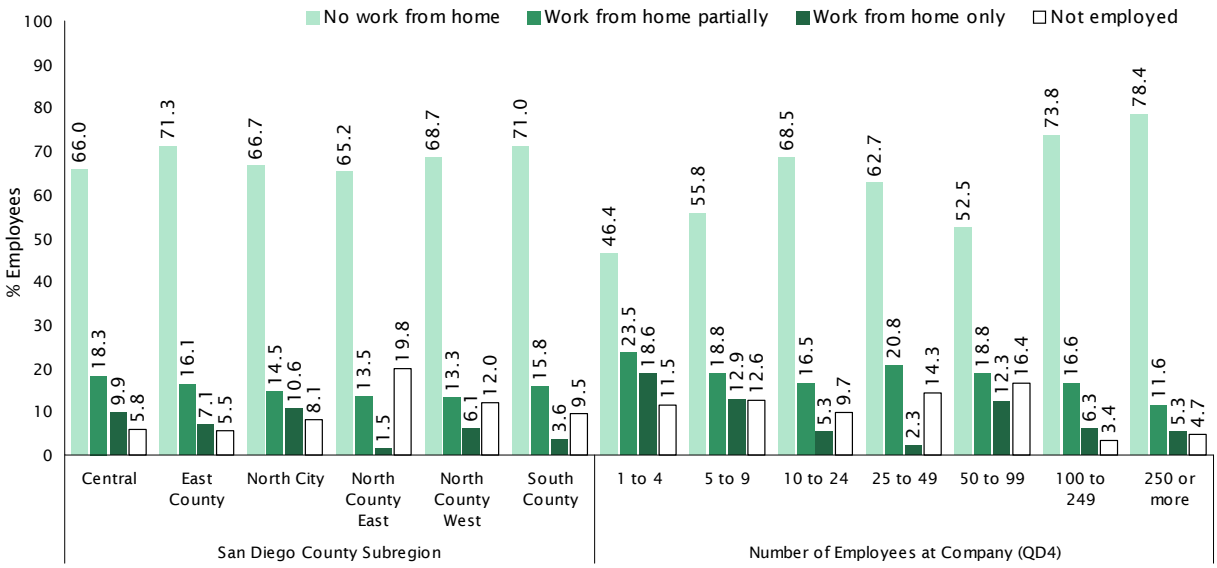
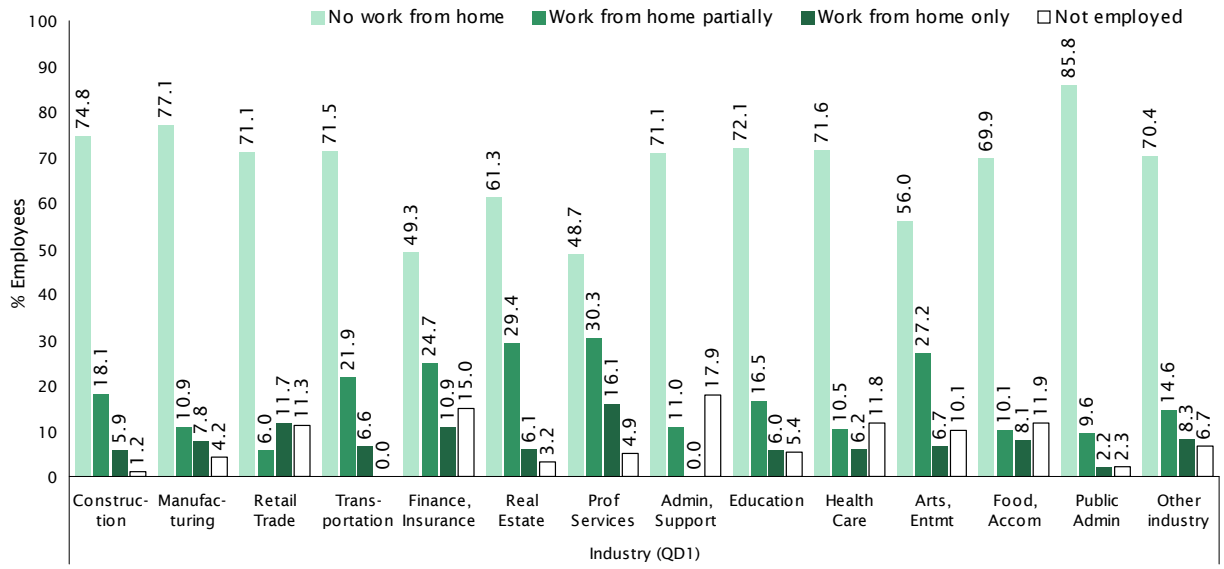


FIGURE 175 REMOTE WORK STATUS BEFORE PANDEMIC BY INDUSTRY



COMMUTE MODE Respondents who indicated they typically commuted to a work destination outside of their home at least once per week prior to the pandemic were subsequently asked to identify the method of transportation they used most often when commuting to their work place (see Figure 176). Overall, the most common method of commuting was driving alone to work in a car, truck, SUV or van (85%). Ridesharing via carpool (4%), vanpool (<1%), and on-demand rideshare services such as Uber and Lyft (1%) accounted for approximately 6% of commutes, while a similar percentage was represented by transit services including bus (3%), Trolley (2%), Coaster (<1%), and Sprinter (<1%). Active transportation modes (biking, walking, jogging, running) were mentioned by approximately 3% of employees as their primary method of commuting to work. All other modes were mentioned by less than 2% of respondents, collectively.

2021 Survey, Question 7 *When you commuted to a work destination outside of your home before the pandemic, how did you typically commute to work? If they say they used multiple transportation methods, ask: Which did you use for the longest portion of your commute?*

FIGURE 176 PRIMARY MODE OF TRANSPORTATION TO WORK PRIOR TO PANDEMIC

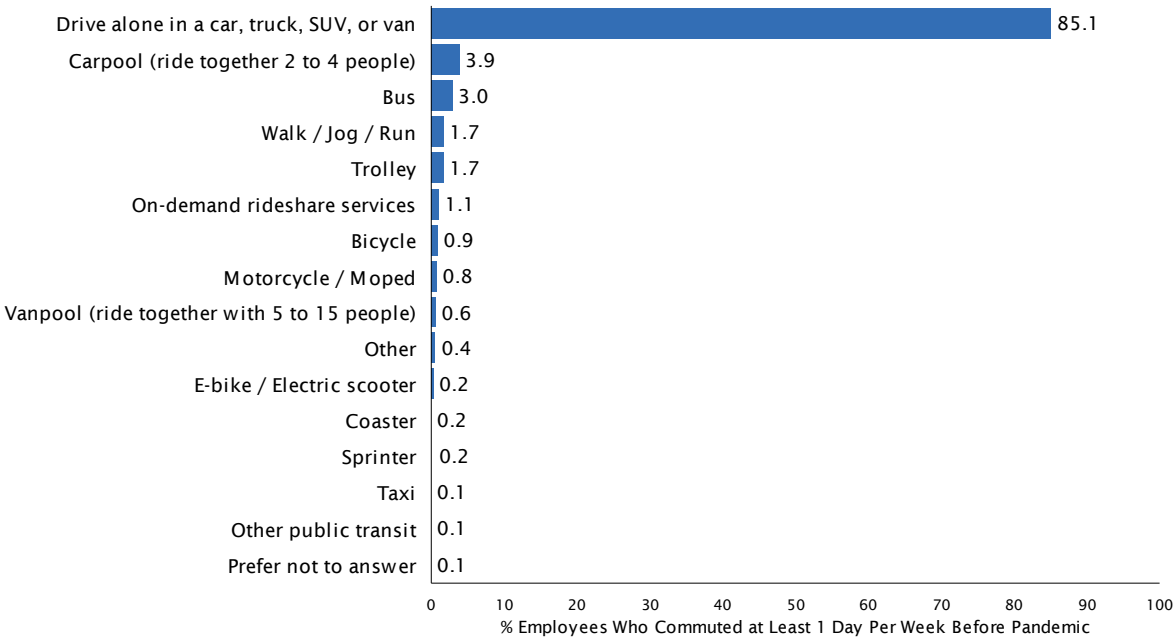
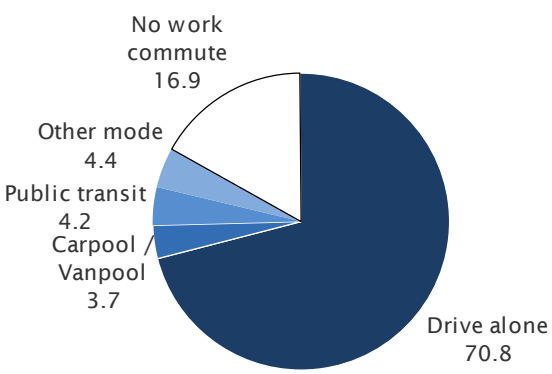


Figure 177 consolidates the various methods of commuting into general categories and places the results in context of all employees surveyed. Approximately 17% of employees indicated they did not commute to a separate work site prior to the pandemic,[18] 71% primarily commuted by driving solo, whereas less than 5% primarily commuted by carpool/vanpool (4%), public transit (4%), or other mode (4%), respectively. Beginning on the next page, Figures 178-180 illustrate how pre-pandemic commute patterns and modes varied across subgroups of employees.

FIGURE 177 PRIMARY COMMUTE MODE BEFORE PANDEMIC



18.This group is a combination of individuals who were not employed pre-pandemic or were employed, but did not commute to a location outside of their home for employment.

FIGURE 178 PRIMARY COMMUTE MODE BEFORE PANDEMIC BY AGE, GENDER, INDEPENDENT CONTRACTOR & SURVEY LANGUAGE

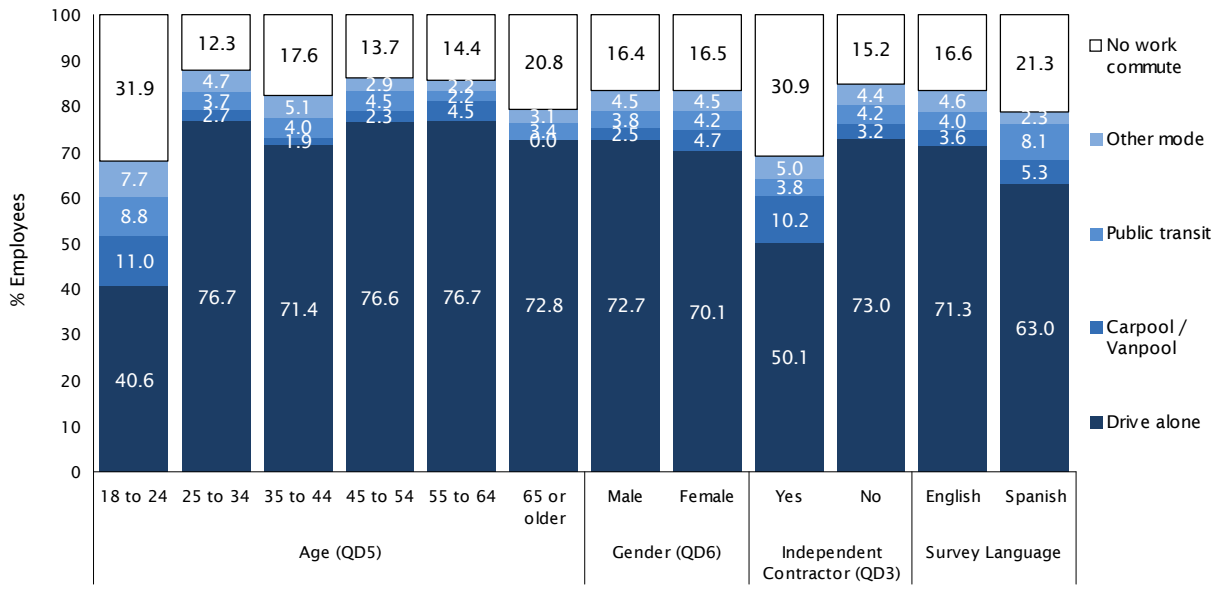


FIGURE 179 PRIMARY COMMUTE MODE BEFORE PANDEMIC BY ETHNICITY & HOUSEHOLD INCOME

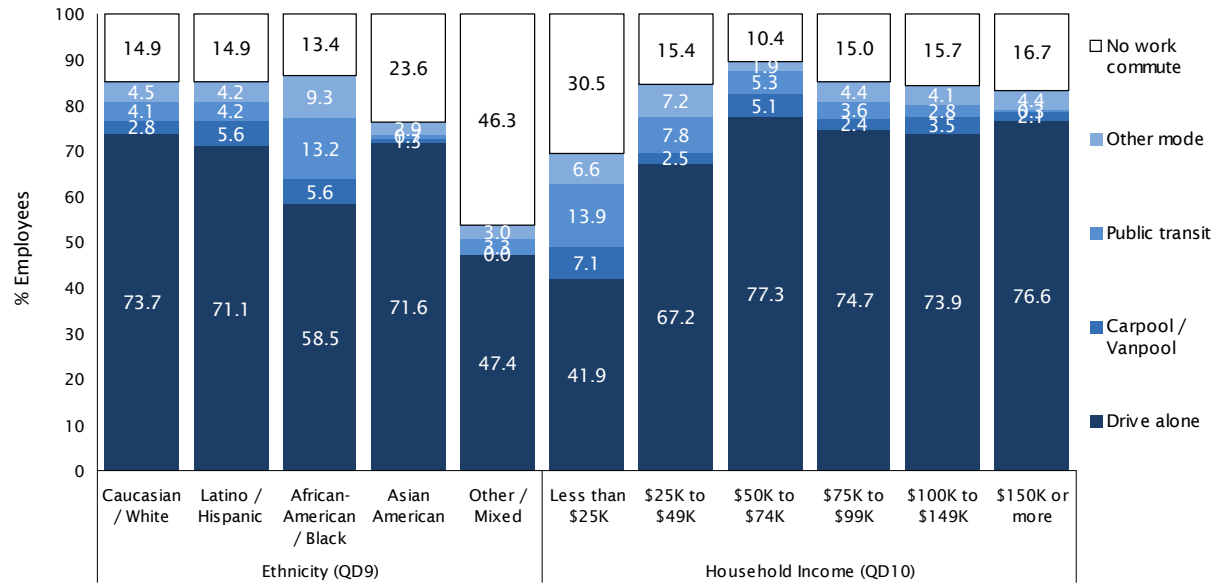
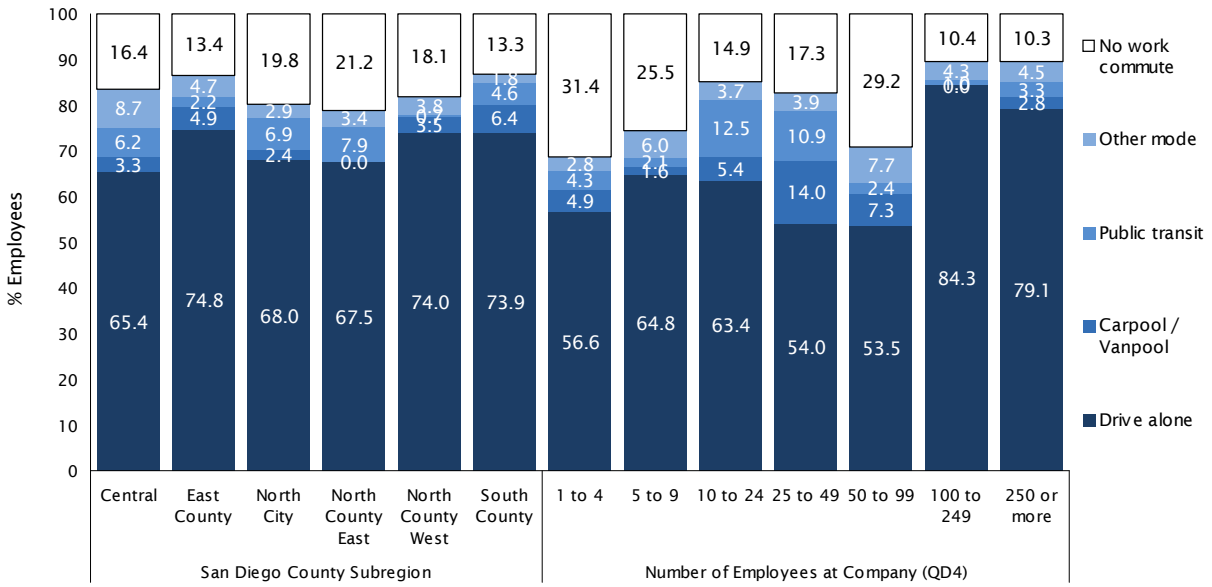


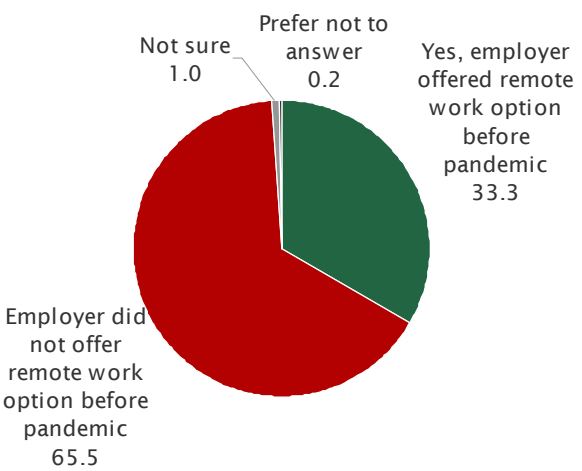
FIGURE 180 PRIMARY COMMUTE MODE BEFORE PANDEMIC BY SAN DIEGO COUNTY SUBREGION & NUMBER OF EMPLOYEES AT COMPANY



REMOTE WORK OPTION Employees who did not report working from home at least one day per week prior to the pandemic were subsequently asked if their employer gave them the option to do so at that time. The results of Question 8 were reformulated to place the findings in the context of all employees (including those who did work from home occasionally and thus were not asked the question).

2021 Survey, Question 8 *Prior to the pandemic, did your employer give you the option to work from home at least one day per week?*

FIGURE 181 EMPLOYER GAVE THE OPTION TO WORK FROM HOME PRIOR TO PANDEMIC



Among all individuals who were employed prior to the pandemic, one-third (33%) indicated that their employer gave them the option to work from home at least one day per week back in January and February, 2020. The option to work from home was most prevalent among employees working in professional services, real estate, and finance and insurance, those in management positions, independent contractors, those who were 65 years of age or older, employees living in high-income households, and those who reside in the Central subregion (see Figures 182-186).

FIGURE 182 EMPLOYER GAVE THE OPTION TO WORK FROM HOME PRIOR TO PANDEMIC BY INDUSTRY

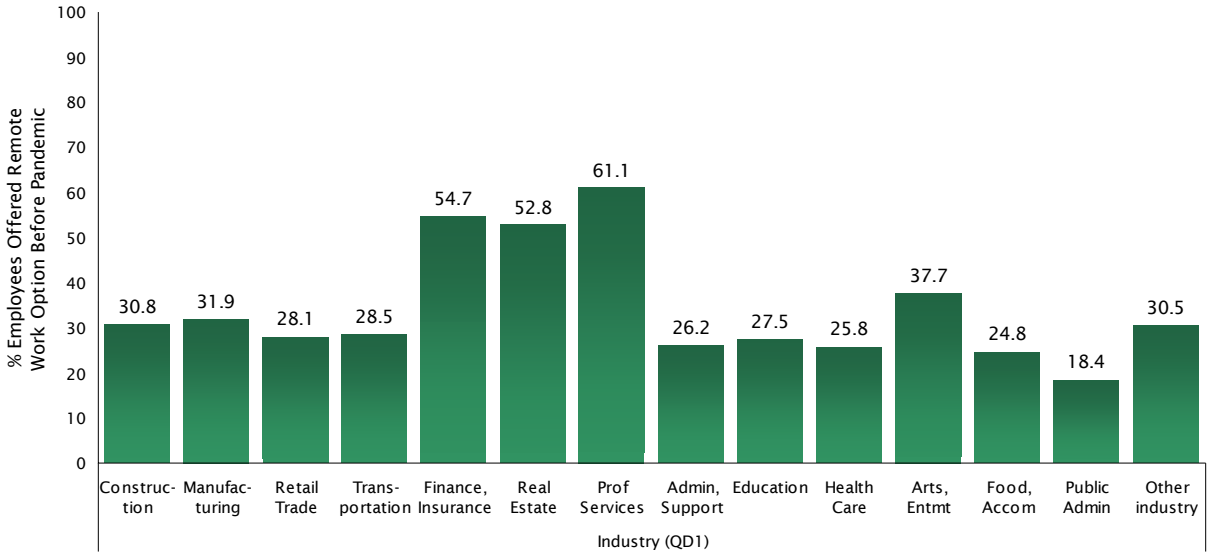


FIGURE 183 EMPLOYER GAVE THE OPTION TO WORK FROM HOME PRIOR TO PANDEMIC BY OCCUPATION

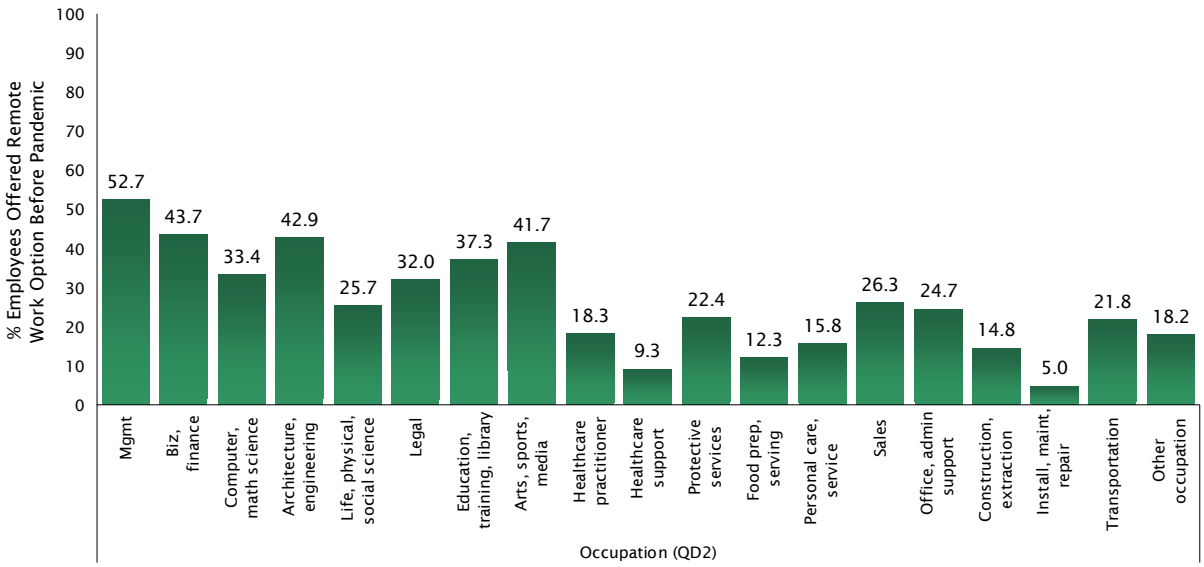


FIGURE 184 EMPLOYER GAVE THE OPTION TO WORK FROM HOME PRIOR TO PANDEMIC BY NUMBER OF EMPLOYEES AT COMPANY, INDEPENDENT CONTRACTOR & SURVEY LANGUAGE

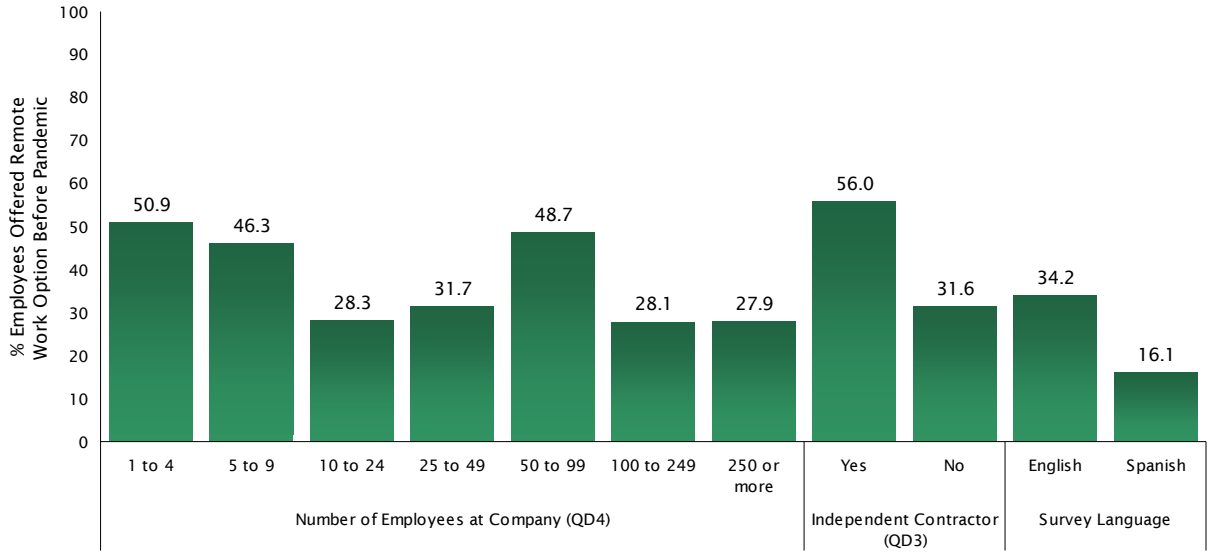


FIGURE 185 EMPLOYER GAVE THE OPTION TO WORK FROM HOME PRIOR TO PANDEMIC BY AGE & ETHNICITY

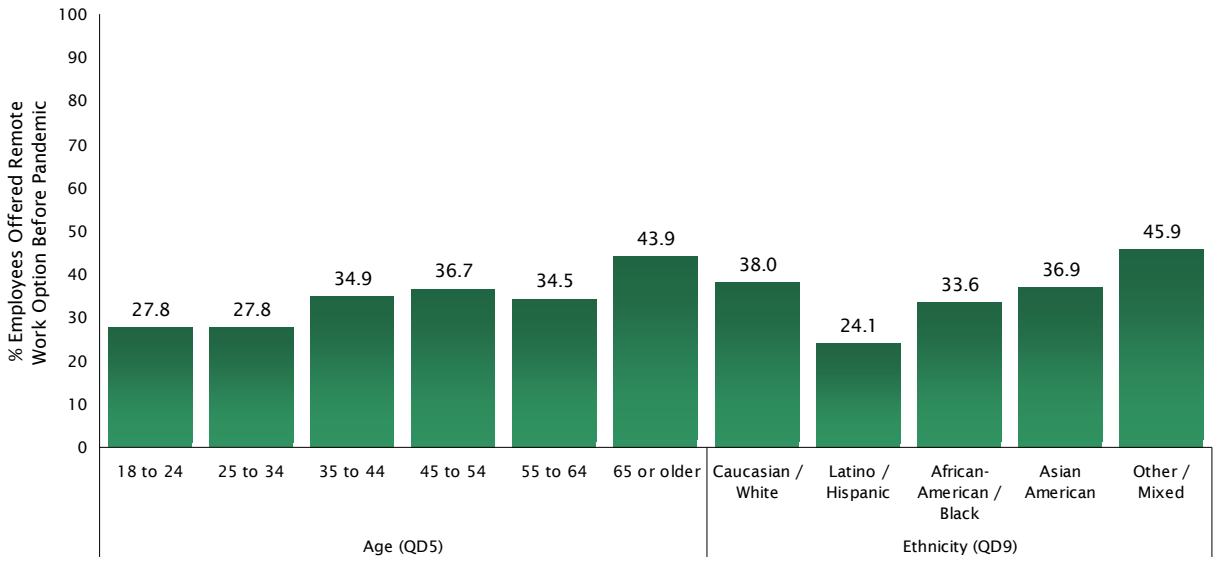
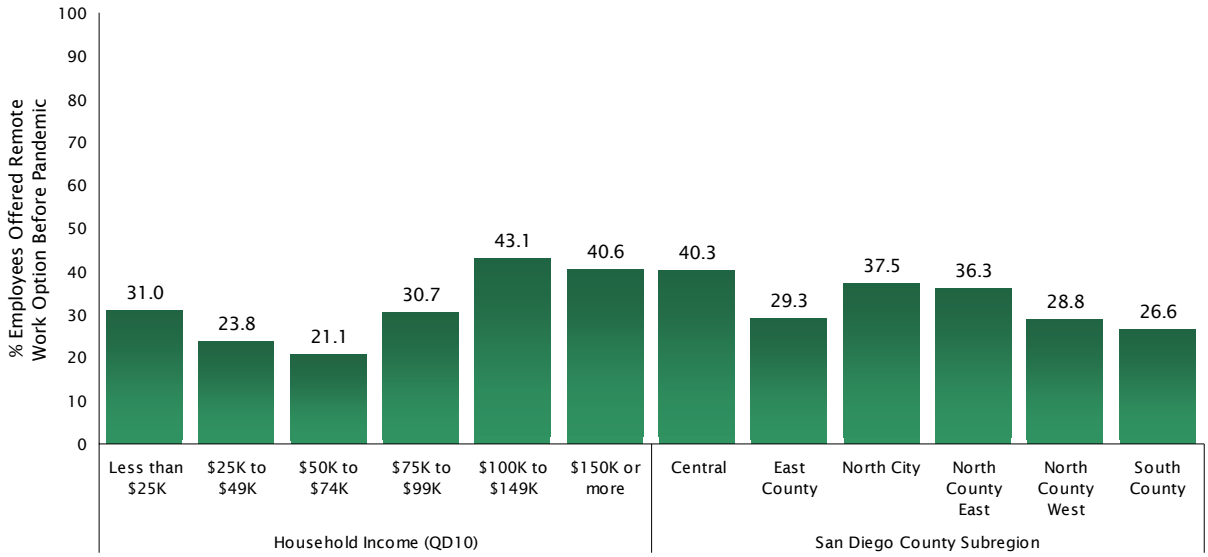


FIGURE 186 EMPLOYER GAVE THE OPTION TO WORK FROM HOME PRIOR TO PANDEMIC BY HOUSEHOLD INCOME & SAN DIEGO COUNTY SUBREGION



EMPLOYEES: PANDEMIC PERIOD

Having profiled employees' work arrangements and primary commute modes prior to the pandemic, the 2021 survey next repeated these same questions for the period during the pandemic.

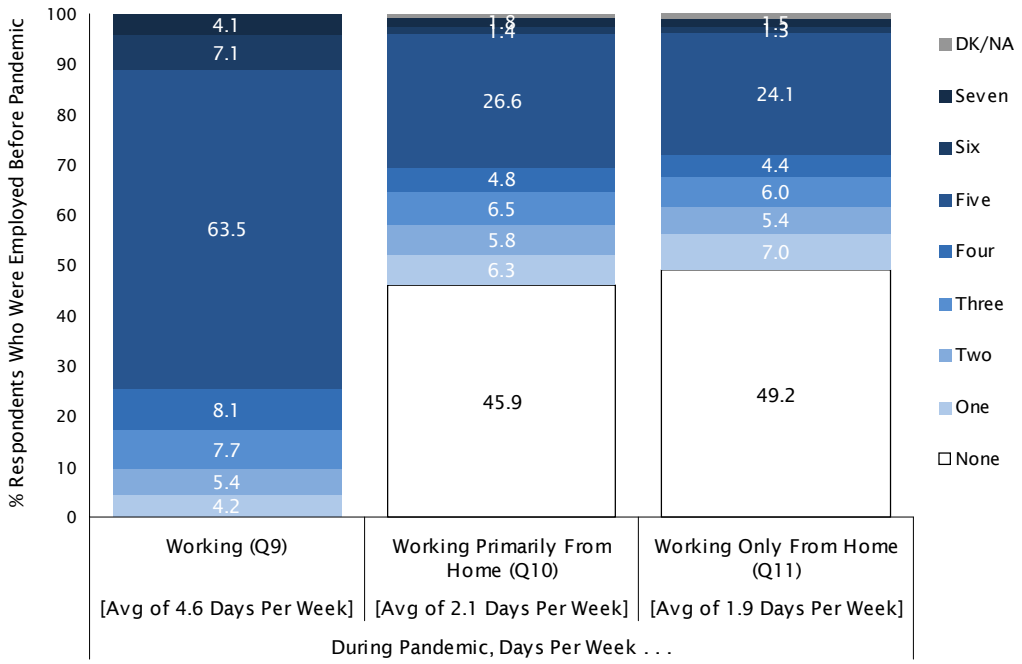
WORK DAYS & REMOTE WORK PATTERNS Although most employees (64%) continued to report that they worked five days per week during the pandemic (Figure 187), the percentage doing so declined 5% when compared to pre-pandemic levels. Overall, the average number of days worked per week declined from 4.8 prior to the pandemic to 4.6 at the time of the survey (during the pandemic).

2021 Survey, Question 9 *For this next set of questions, please describe your current situation - during the pandemic. Currently, how many days per week do you typically work?*

2021 Survey, Question 10 *Of the <insert from Q9> work days per week you typically work, how many of these days do you primarily work from home?*

2021 Survey, Question 11 *Of the <insert from Q10> days you primarily work from home, how many days do you typically work from home the entire day without commuting to a separate work site?*

FIGURE 187 DAYS WORKED DURING PANDEMIC PER WEEK



Although the number of days worked per week did not change much during the pandemic, *where* the work was conducted did change. During the pandemic period, more than half (54%) of employees indicated that they worked from home at least one day per week, and nearly one-third of respondents (31%) stated they primarily worked from home five or more days per week. Among all employees, the average number of days worked from home increased from 0.8 pre-

pandemic to 2.1 during the pandemic period (2021). Similarly, the average number of days employees worked *exclusively* from home increased from 0.6 pre-pandemic to 1.9 during the pandemic.

Figures 188-191 present the average number of days worked, average days worked primarily from home, and average days worked exclusively from home during the pandemic period across various subgroups of employees. The most striking differences in the average number of days worked remotely occurred by industry and household income, with higher income households and those working in finance and insurance, professional services, education, and other industries working from home during the pandemic more often than their counterparts.

FIGURE 188 DAYS WORKED DURING PANDEMIC PER WEEK BY AGE, GENDER, INDEPENDENT CONTRACTOR & SURVEY LANGUAGE

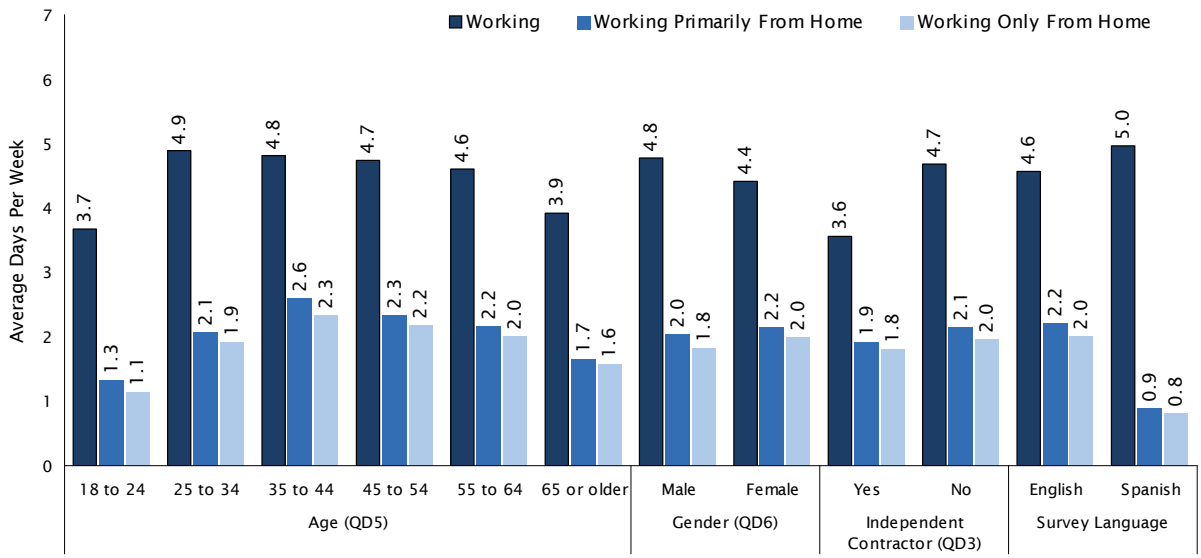


FIGURE 189 DAYS WORKED DURING PANDEMIC PER WEEK BY ETHNICITY & HOUSEHOLD INCOME

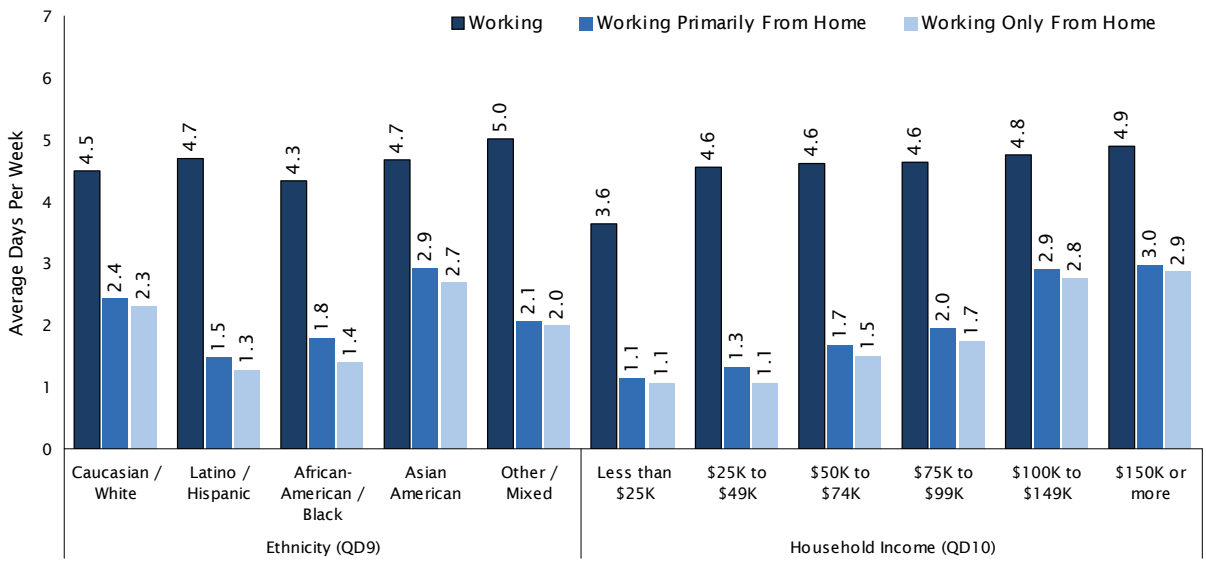


FIGURE 190 DAYS WORKED DURING PANDEMIC PER WEEK BY SAN DIEGO COUNTY SUBREGION & NUMBER OF EMPLOYEES AT COMPANY

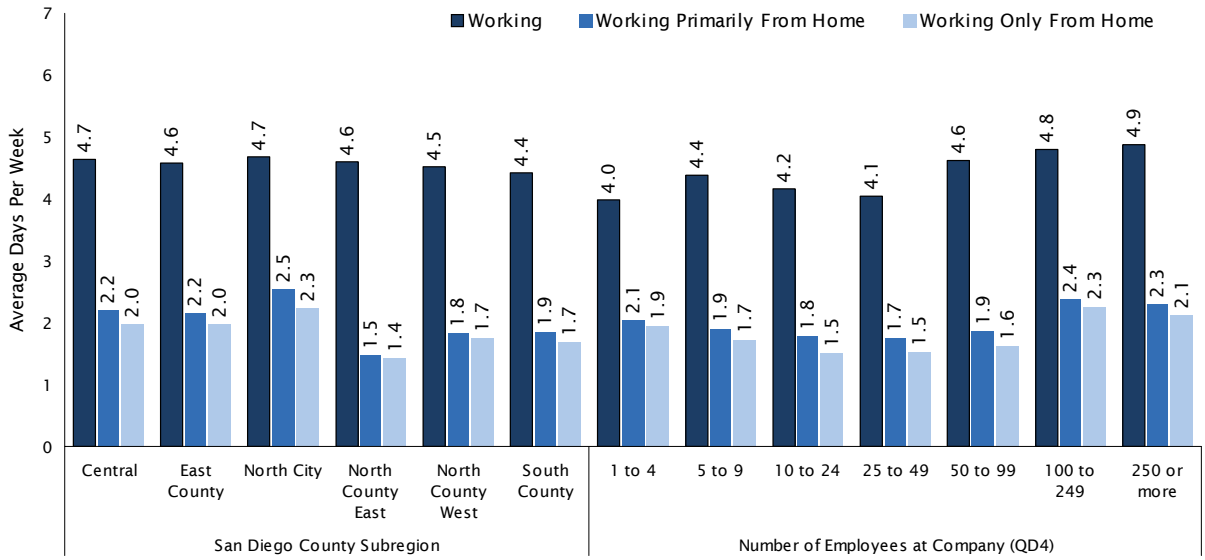


FIGURE 191 DAYS WORKED DURING PANDEMIC PER WEEK BY INDUSTRY

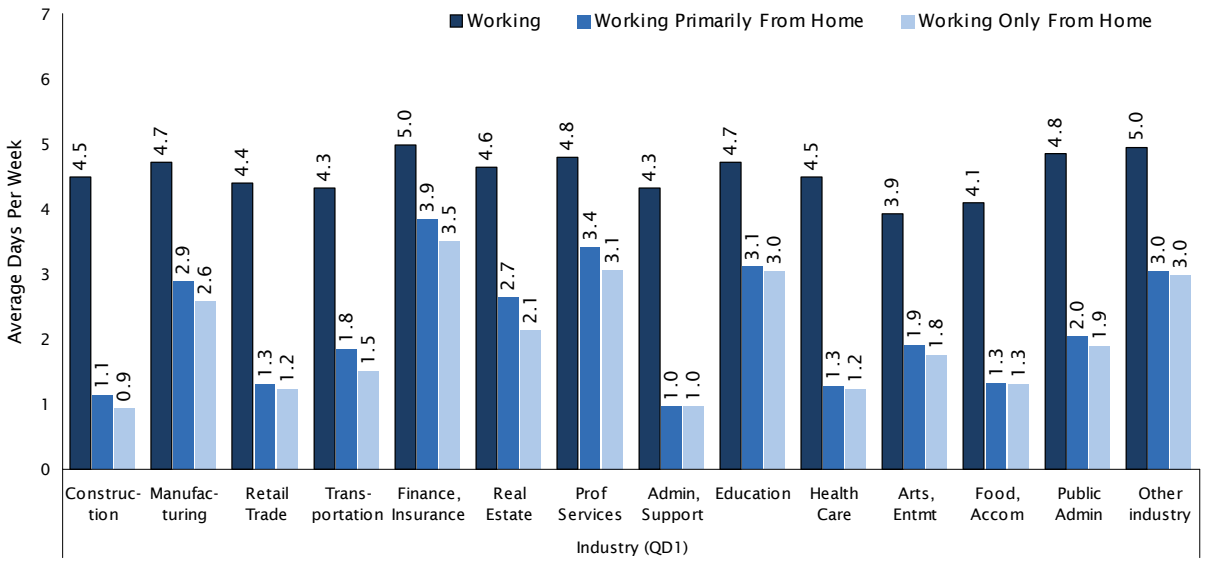


Figure 192 on the next page summarizes employees' work patterns during the pandemic period (2021), documenting the percentage of employees who fit into specific work arrangement categories. Whereas prior to the pandemic 68% of employees surveyed reported that they never worked from home (see Figure 171), less than half (46%) of employees indicated in 2021 they worked exclusively away from their home. Meanwhile, one-third of employees (33%) were working exclusively from home, up from 8% prior to the pandemic. Of the 21% who were working from home on a partial basis in 2021, 12% worked exclusively at home some days and exclusively at an office other days, 5% worked from home all days of the week, but split some days at the office for a few hours, and 4% worked a mix of days at home, at the office, and split days. Figures 193-196 show how various subgroups of employees were distributed among the main work arrangement categories during the pandemic period.

FIGURE 192 REMOTE WORK DURING PANDEMIC

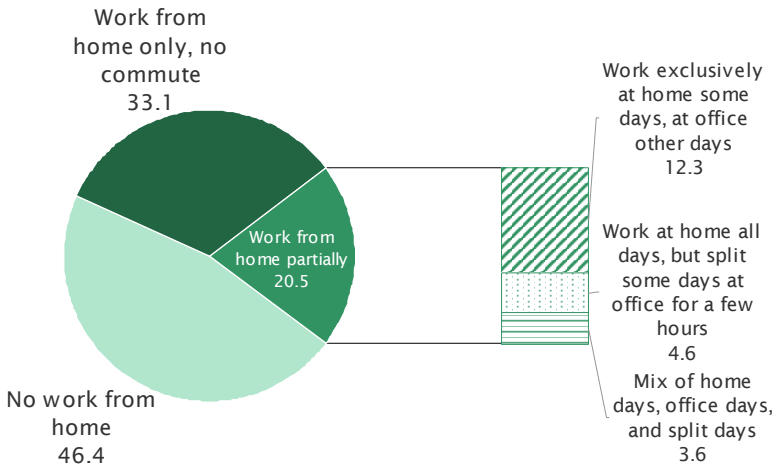


FIGURE 193 REMOTE WORK DURING PANDEMIC BY AGE, GENDER, INDEPENDENT CONTRACTOR & SURVEY LANGUAGE

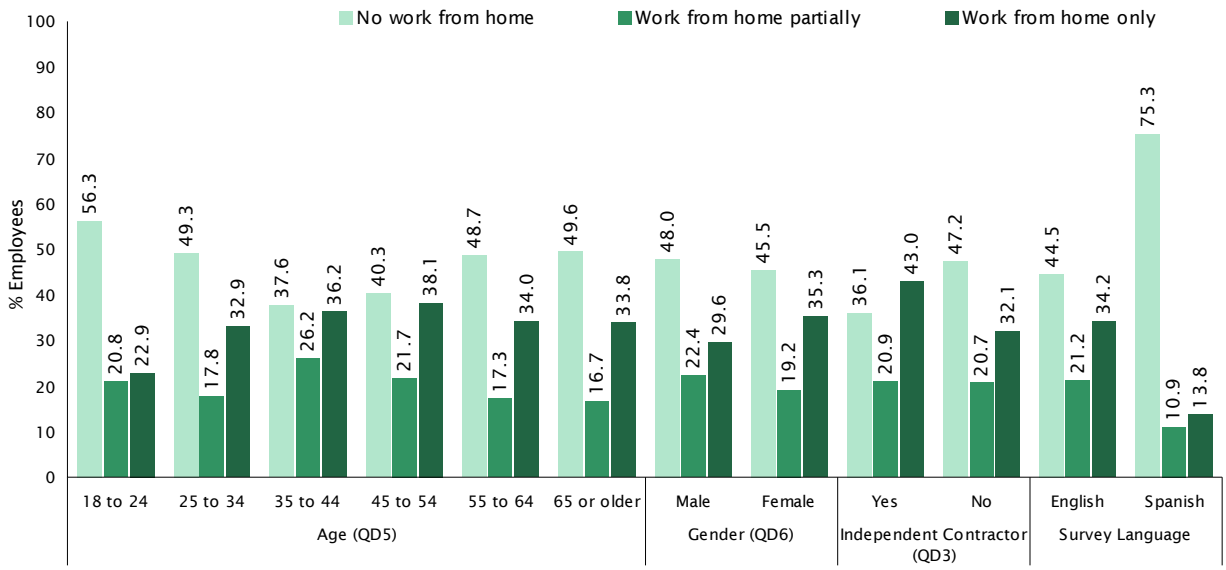


FIGURE 194 REMOTE WORK DURING PANDEMIC BY ETHNICITY & HOUSEHOLD INCOME

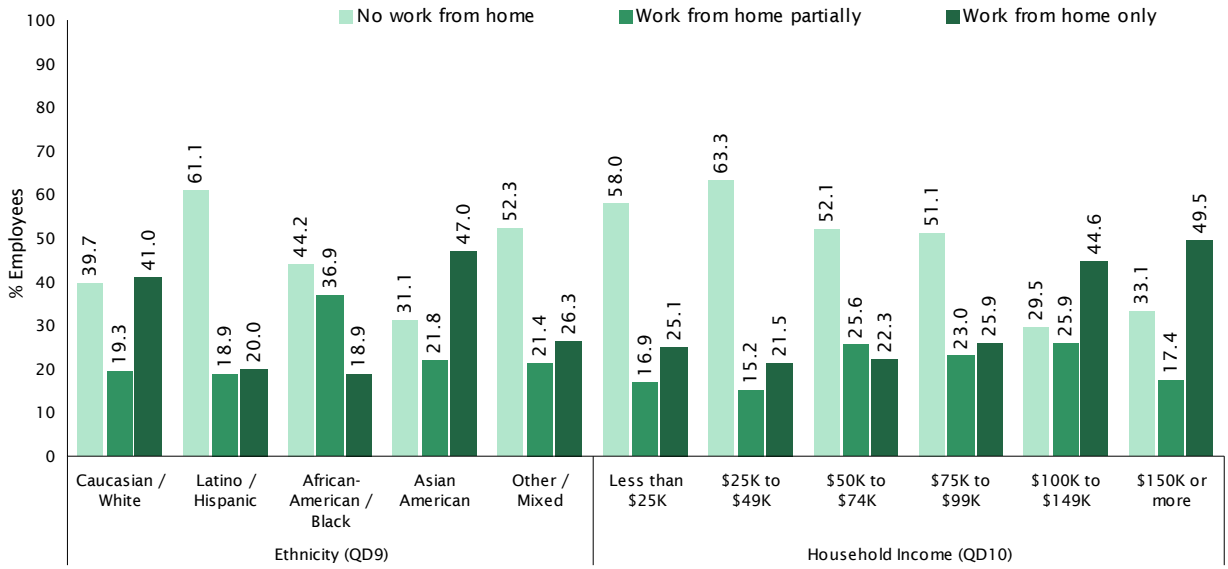


FIGURE 195 REMOTE WORK DURING PANDEMIC BY SAN DIEGO SUBREGION & NUMBER OF EMPLOYEES AT COMPANY

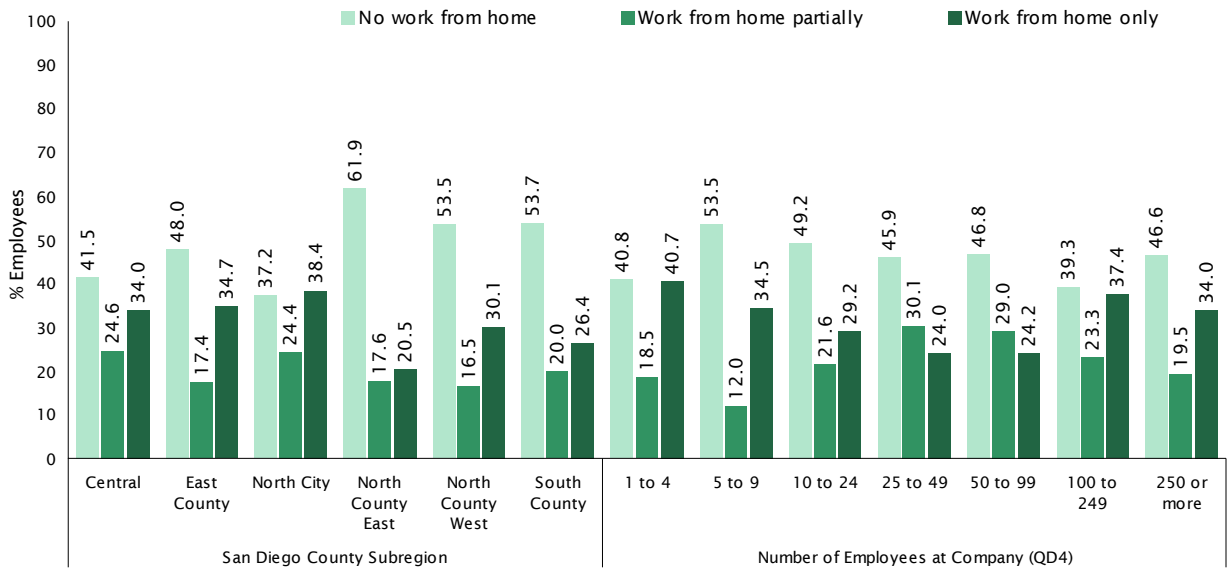
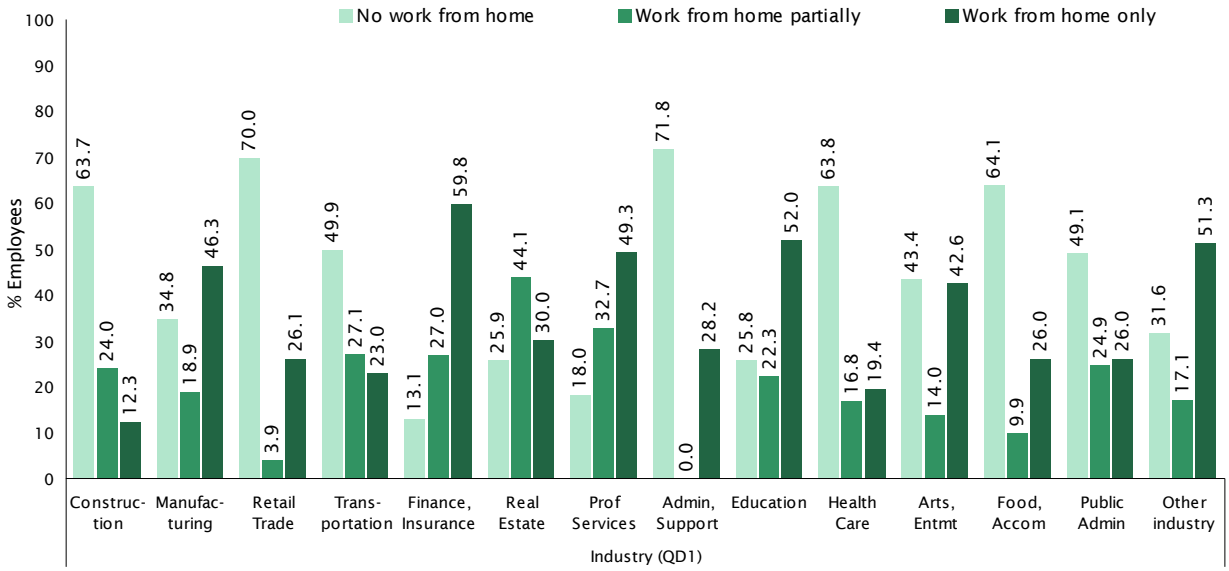


FIGURE 196 REMOTE WORK DURING PANDEMIC BY INDUSTRY



REMOTE WORK OPTION Approximately one-third of employees (33%) indicated that they had the option to work from home at least one day per week, prior to the pandemic (see Figure 181 on page 105). During the pandemic period, the corresponding percentage was much higher at 59% (Figure 197), although it varied substantially by industry, occupation, ethnicity, household income, subregion of residence, and the language in which the survey was completed (see Figures 198-202). At the extremes, just 9% of individuals working in healthcare and installation, maintenance or repair indicated they had the option to work remotely during the pandemic, whereas more than 90% of architects, engineers, and those working as life, physical or social scientists had the option to work from home. In general, those working in blue-collar industries and occupations, Latinos and Spanish speakers, and individuals in lower-income households were less likely than their counterparts in 2021 to report having the option to work remotely during the pandemic.

2021 Survey, Question 12 *Does your employer currently give you the option to work from home at least one day per week?*

FIGURE 197 OPTION TO WORK FROM HOME DURING PANDEMIC

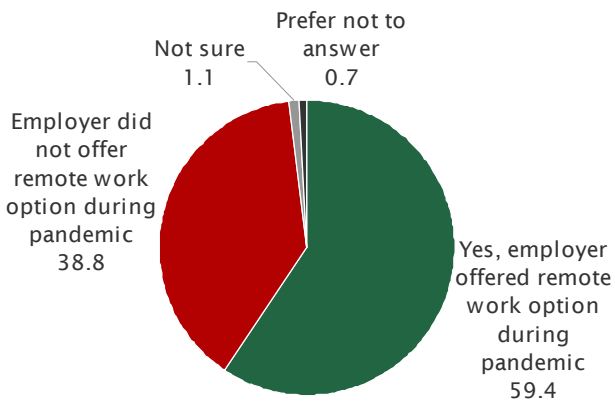


FIGURE 198 OPTION TO WORK FROM HOME DURING PANDEMIC BY INDUSTRY

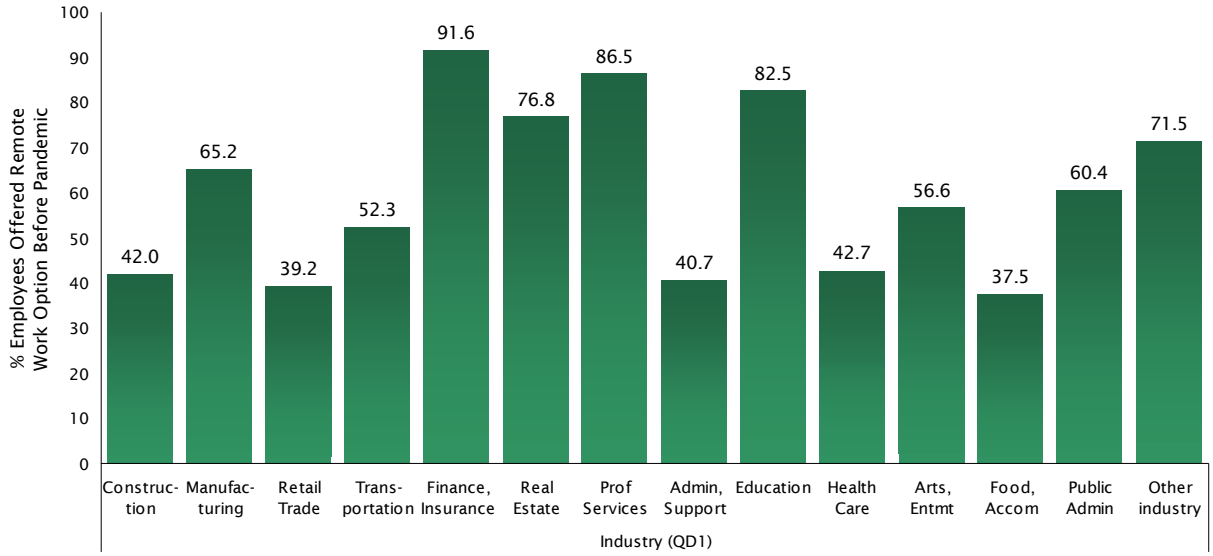


FIGURE 199 OPTION TO WORK FROM HOME DURING PANDEMIC BY OCCUPATION

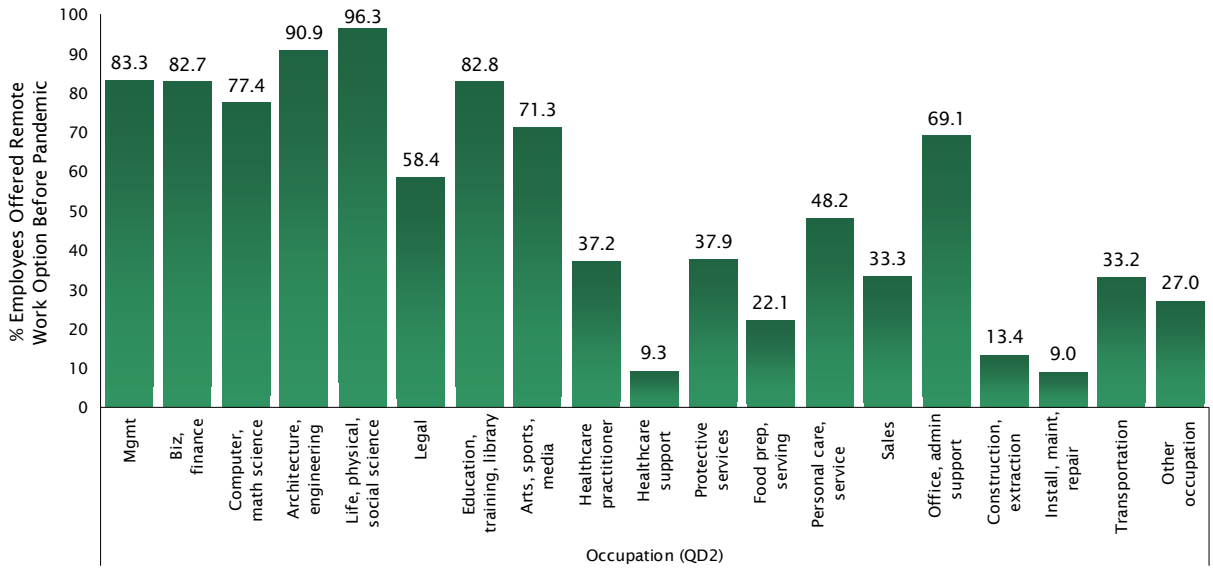


FIGURE 200 OPTION TO WORK FROM HOME DURING PANDEMIC BY NUMBER OF EMPLOYEES AT COMPANY, INDEPENDENT CONTRACTOR & SURVEY LANGUAGE

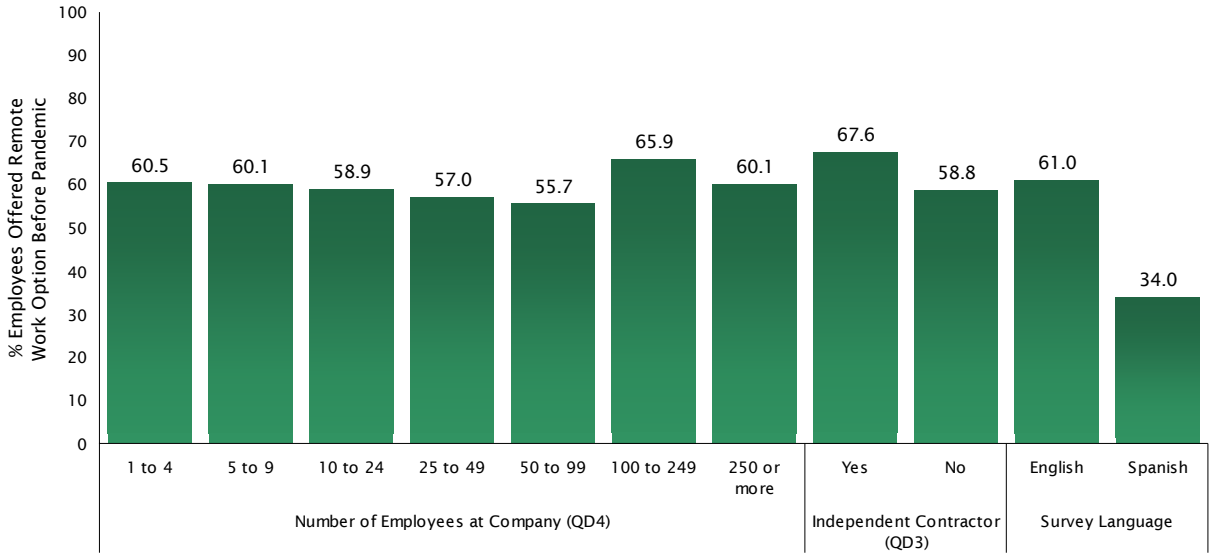


FIGURE 201 OPTION TO WORK FROM HOME DURING PANDEMIC BY AGE & ETHNICITY

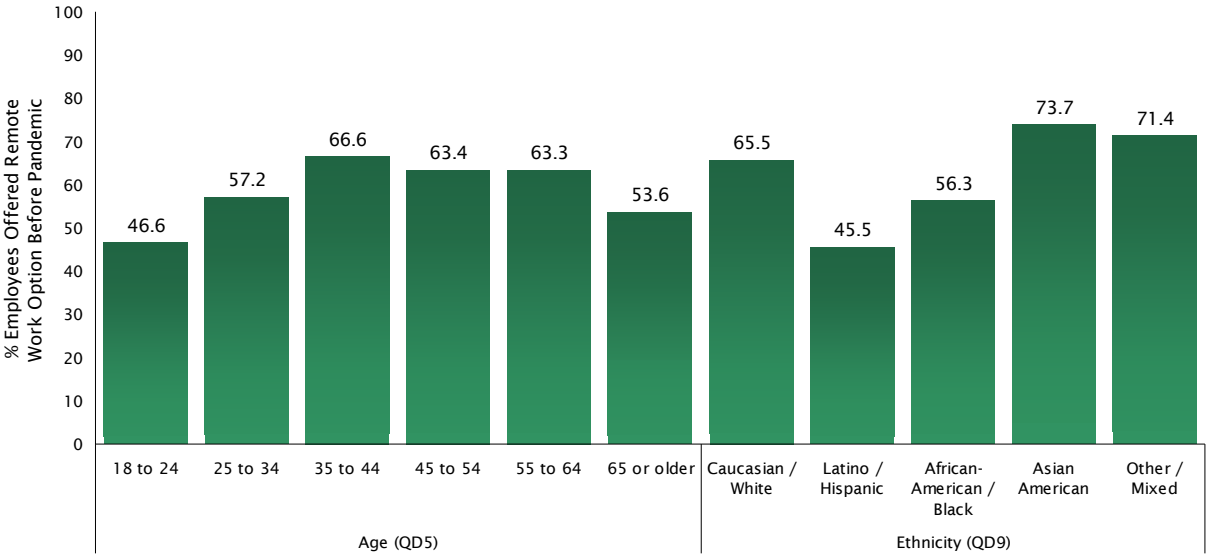
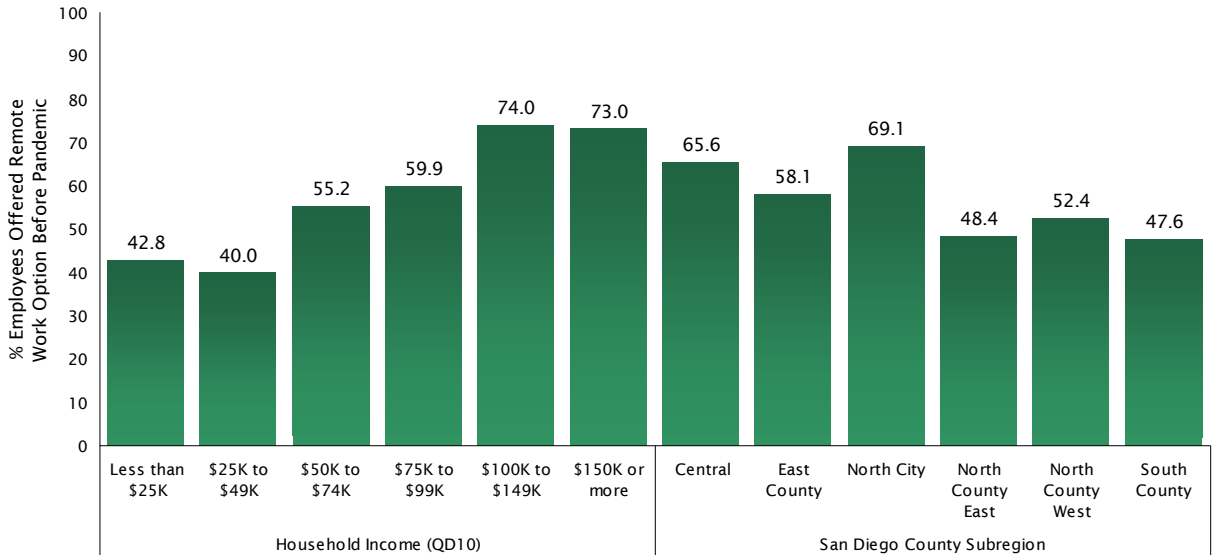


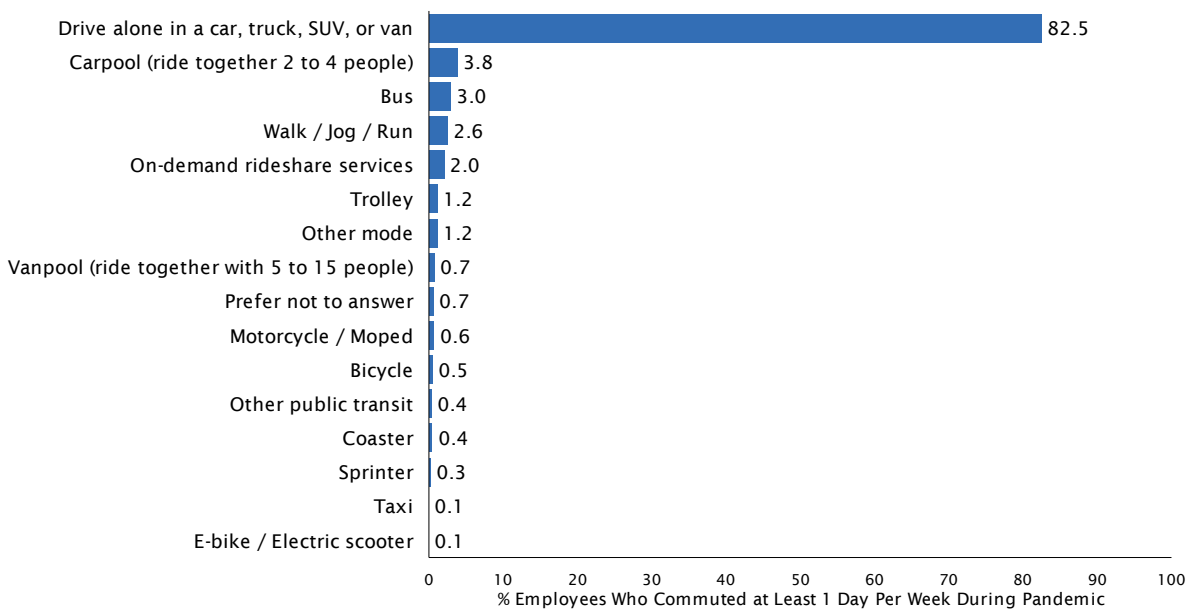
FIGURE 202 OPTION TO WORK FROM HOME DURING PANDEMIC BY HOUSEHOLD INCOME & SAN DIEGO COUNTY SUBREGION



COMMUTE MODE Respondents who indicated they commuted to a work destination outside of their home at least once per week during the pandemic were asked to identify the method of transportation they used most often when commuting to their work place (Figure 203).

2021 Survey, Question 13 *When you commute to a work destination outside of your home, how do you typically commute to work? If they say they use multiple transportation methods, ask: Which do you use for the longest portion of your commute?*

FIGURE 203 PRIMARY MODE OF TRANSPORTATION TO WORK DURING PANDEMIC



As shown in Figure 203, driving alone to work in a car, truck, SUV or van was the most common method of commuting during the pandemic (83%), followed by carpooling (4%), taking a bus (3%), walking, running or jogging (3%), and using an on-demand rideshare service such as Uber or Lyft (2%). Collectively, ridesharing (carpool, vanpool, and on-demand rideshare services) accounted for 7% of commutes, transit (bus, Trolley, Coaster, Sprinter, other) accounted for 5% of commutes, and active transportation (biking, walking, jogging, running) was mentioned by 3% as their primary method of commuting to work.

FIGURE 204 PRIMARY COMMUTE MODE DURING PANDEMIC

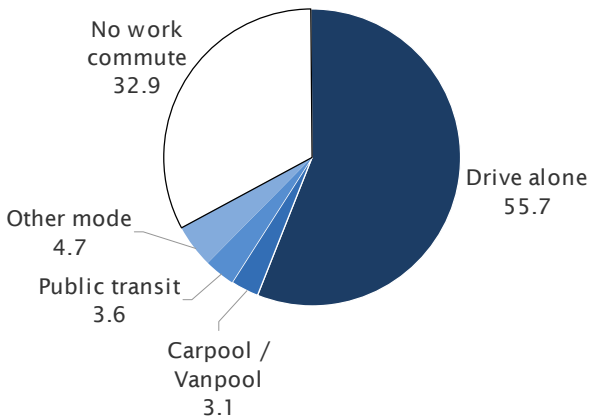


Figure 204 consolidates the various methods of commuting into general categories and places the results in context of *all* employees surveyed. Approximately 33% of employees indicated they didn't commute to a separate work site during the pandemic period, 56% primarily commuted by driving solo, whereas less than 5% primarily commuted by carpool/ vanpool (3%), public transit (4%), or other mode (5%), respectively. Figures 205-207 illustrate how pandemic commute patterns and modes varied across subgroups of employees.

FIGURE 205 PRIMARY COMMUTE MODE DURING PANDEMIC BY AGE, GENDER, INDEPENDENT CONTRACTOR & SURVEY LANGUAGE

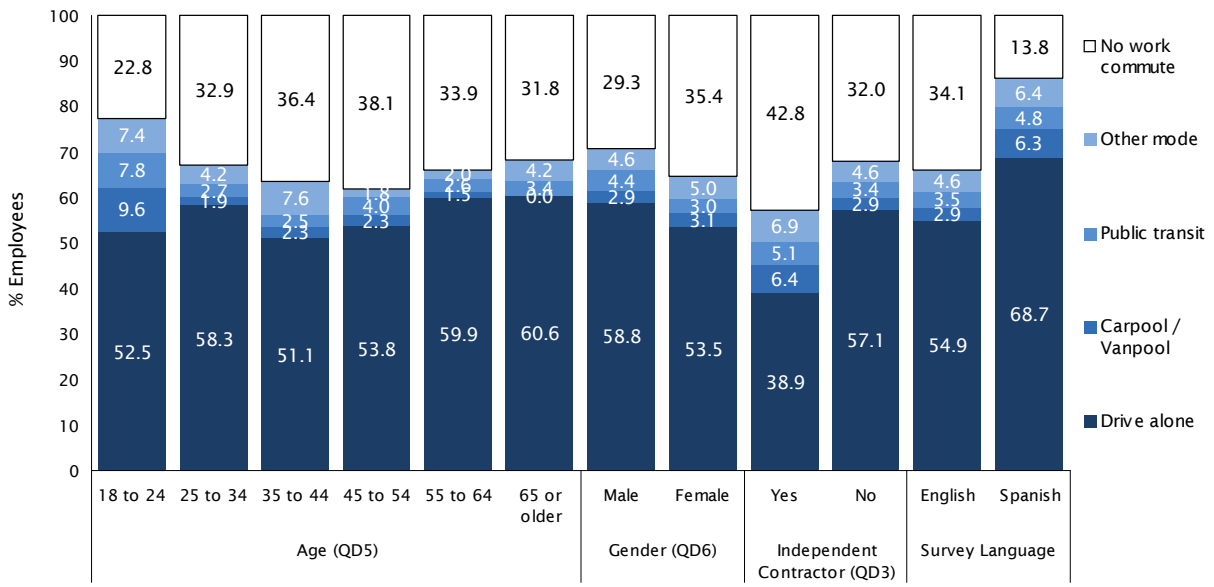


FIGURE 206 PRIMARY COMMUTE MODE DURING PANDEMIC BY ETHNICITY & HOUSEHOLD INCOME

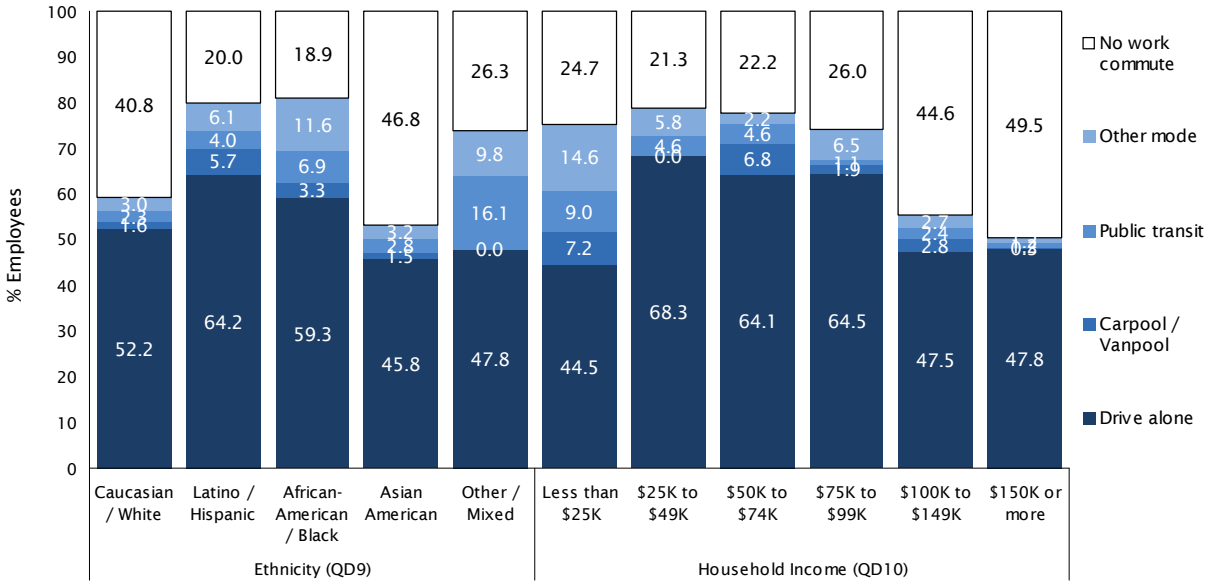
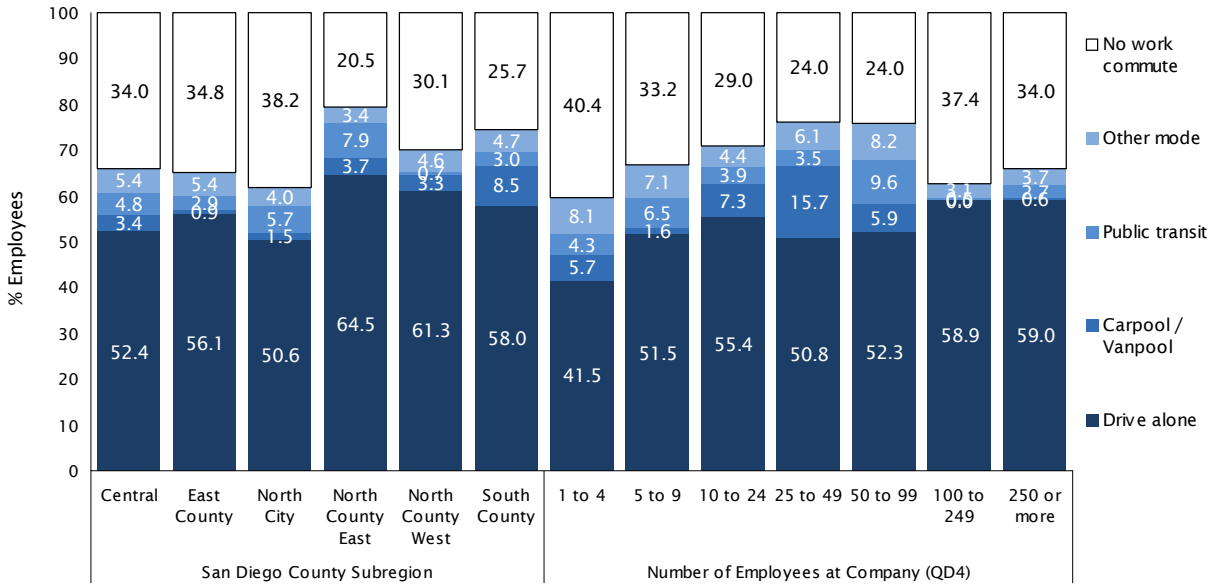


FIGURE 207 PRIMARY COMMUTE MODE DURING PANDEMIC BY SAN DIEGO COUNTY SUBREGION & NUMBER OF EMPLOYEES AT COMPANY



Employees: Remote Work Experiences During Pandemic

Employees who worked at home at least one day per week during the pandemic 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.

REMOTE WORK IMPACTS The first question in this series presented respondents with each item shown on the left of Figure 208 and simply asked whether they found that working from home had 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 had been impacted (helped or hurt).

During the pandemic, employees reported that working from home had the most impact on their ability to strike a balance between work and their personal life, their expenses, and their ability to manage their time, with approximately eight in ten employees reporting either a positive or negative impact for each dimension. Approximately two-thirds of employees also reported that working from home had an impact on their ability to collaborate with other employees, their productivity, and their job satisfaction. At the other end of the spectrum, employees were less apt to identify remote work impacts on their ability to communicate with external customers or partners, the quality of their work, and their ability to communicate with other employees.

2021 Survey, Question 14 *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 208 IMPACT OF WORKING FROM HOME DURING PANDEMIC

For every dimension tested, some employees felt that remote work arrangements helped, while others perceived they hurt. Figure 209 on the next page displays the findings of Question 14 in a format that makes it easier to identify dimensions for which the *net* impact across all

employees was generally negative or positive. Unlike businesses that generally found remote work arrangements to be harmful on most dimensions during the pandemic (see Figure 120 on page 72), employees were more apt to find that remote work helped many aspects of their performance and work environment. Indeed, 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 (44%), ability to manage their time (29%), their productivity (27%), the quality of their work (27%), and their job satisfaction (26%).

FIGURE 209 NEGATIVE/POSITIVE IMPACTS OF EACH ASPECT DURING PANDEMIC

CHANGES DUE TO WORKING FROM HOME

Employees who reported working from home at least one day per week during the pandemic period were subsequently asked to describe the types of changes they may have made due to the arrangement. As shown in Figure 210 on the next page, two-thirds of employees indicated they had created dedicated space in their home for an office or work space (66%), while more than four-in-ten employees had changed the hours of the day they work (43%), increased the number of hours they work (43%), and experienced problems because of poor Internet access at their home (42%). Overall, approximately one-in-five employees (19%) moved to a new house or had plans to do so in response to working from home, while approximately one-in-ten (12%) reduced the number of vehicles their household owned. Figure 211 shows how the percentage of employees that made changes in response to working from home during the pandemic varied according to their pre-pandemic remote work arrangements. Those who did not work remotely prior to the pandemic were the most likely to report having created dedicated work space in their home, changing their work hours, and increasing the number of hours they work during the pandemic.

2021 Survey, Question 15 *Because you are working from home, have you: _____?*

FIGURE 210 CHANGES MADE DURING PANDEMIC DUE TO WORKING FROM HOME

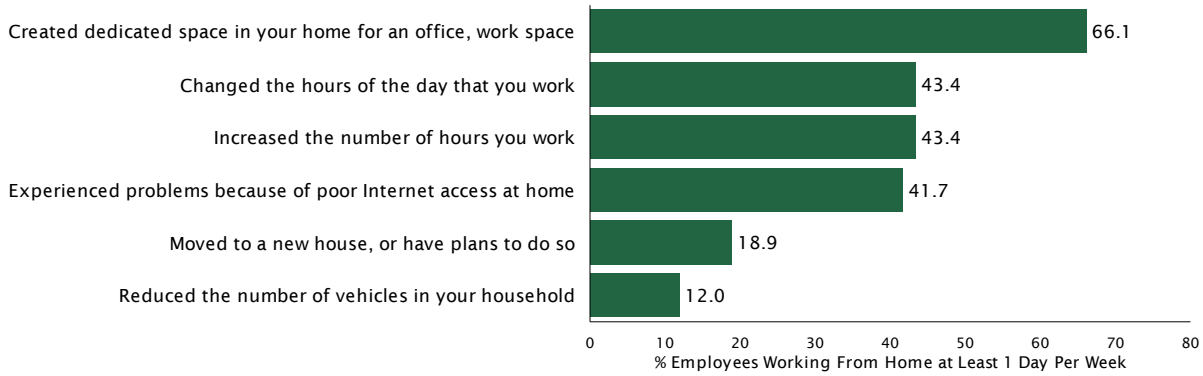
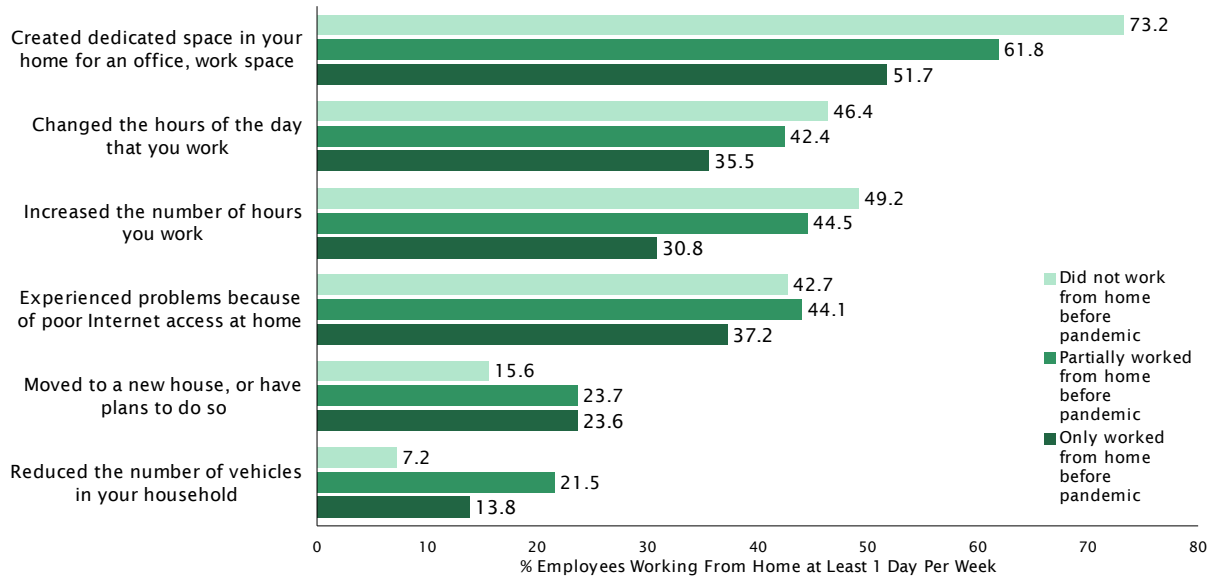


FIGURE 211 CHANGES MADE DURING PANDEMIC DUE TO WORKING FROM HOME BY REMOTE WORK STATUS BEFORE PANDEMIC



MOVING TO A NEW HOME The final question in this series (Question 16) was reserved for employees who indicated they had moved their home during the pandemic in response to working from home (or had plans to do so). When asked about the proximity of their new home in relation to their employer's main location, the 2021 survey results did not reveal a net migration to distances further away from employers' locations. Figure 212 on the next page puts the results of Question 16 into the context of *all* employees and shows that the 19% of employees that reported moving during the pandemic were fairly evenly split among those who moved closer to their employer's location (5%), those who moved further away (5%), and those who moved to a location about the same distance away as their prior home (8%). The tendency to move further away from one's employer during the pandemic was most pronounced among households earning less than $50,000 annually (see Figure 213). The above notwithstanding, it should be noted that since employees were sampled from those living in the San Diego region,

employees who moved out of the region were not represented in the 2021 sample unless they kept their same phone number and/or email. Thus, these figures likely underestimate the net migration away from employers' locations.

2021 Survey, Question 16 *You indicated that you moved your home or have plans to do so. Is your new home closer to your employer's main location, about the same distance, or is it further away?*

FIGURE 212 NEW HOME LOCATION DURING PANDEMIC

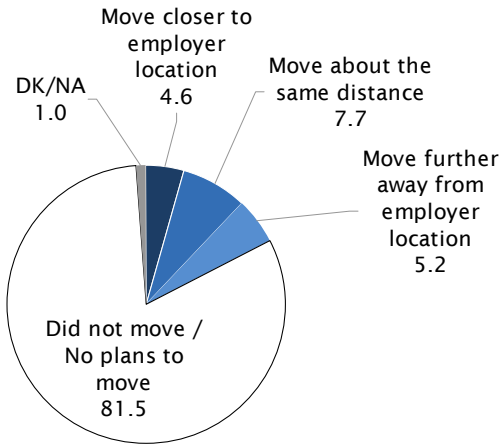
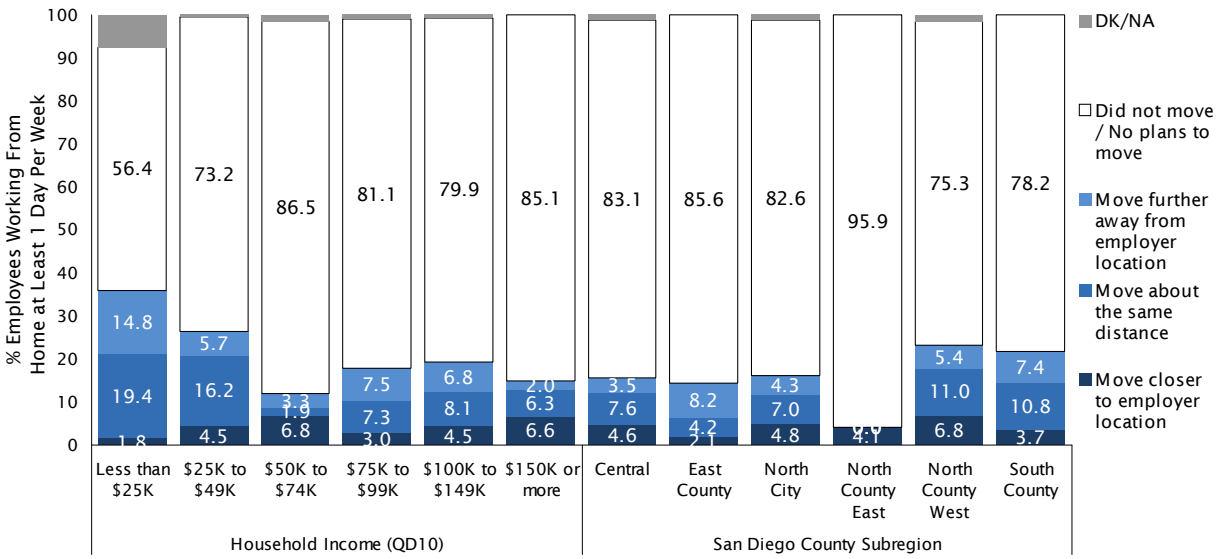


FIGURE 213 NEW HOME LOCATION DURING PANDEMIC BY HOUSEHOLD INCOME & SAN DIEGO COUNTY SUBREGION



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EMPLOYEES: PANDEMIC TRAVEL & ACTIVITIES

Although much of the 2021 Employee Survey focused on employment and work arrangements, the survey also addressed other aspects of daily life that can shape how, where, and when people travel in the San Diego region.

IMPACT OF PANDEMIC ON ACTIVITIES

For each of the activities shown on the left of Figure 214, employees were asked in 2021 whether they engaged in this activity more often, less often, or at about the same frequency as they did prior to pandemic. As one might expect with the restrictions placed on businesses and restaurants during the pandemic, many employees reported that they shopped online and had packages delivered to their home more often (67%) and had food or groceries delivered to their home (48%) more often during the pandemic than pre-pandemic.

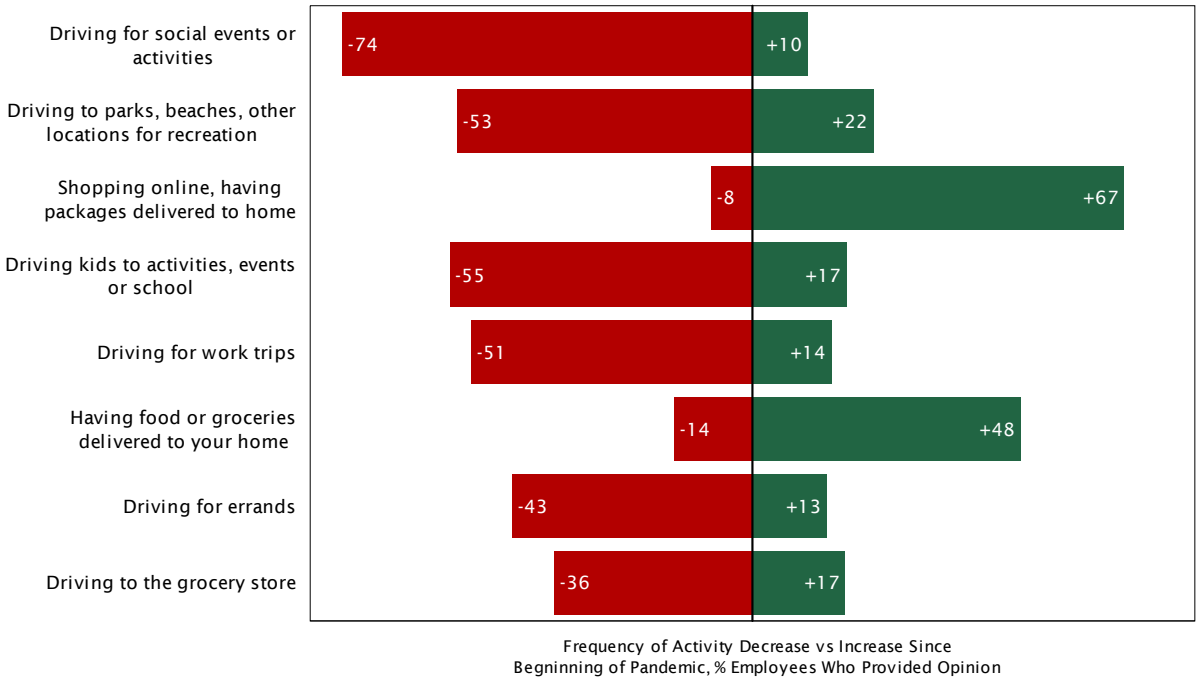
When it came to *driving*, however, employees generally reported that they were doing less of this during the pandemic than before the pandemic started. The percentage who reported making fewer driving trips was highest for social events or activities (74%), taking kids to activities, events or school (55%), going to parks, beaches or other locations for recreation (54%), and driving for work trips (51%). Approximately four-in-ten employees also reported driving less often for errands (43%) and trips to the grocery store (36%) in 2021 when compared to before the pandemic.

2021 Survey, Question 18 *When compared to before the pandemic started, are you _____ more often, about the same, or less often? Get answer, then ask: Would that be much (more/less) often or somewhat (more/less) often?*

FIGURE 214 FREQUENCY OF ACTIVITIES DURING PANDEMIC COMPARED TO BEFORE PANDEMIC STARTED

Figure 215 on the next presents a simplified view of the data that makes it easier to identify those activities with the largest net increases or decreases in frequency during the pandemic period when compared to before the pandemic. All driving-related items were found to have large net decreases in frequency, whereas the online shopping and food-delivery items had large increases.

FIGURE 215 DECREASE VS INCREASE OF ACTIVITIES DURING PANDEMIC COMPARED TO BEFORE PANDEMIC STARTED



EMPLOYEES: POST-PANDEMIC EXPECTATIONS IN 2021

Having explored how the pandemic impacted employees' work arrangements and various aspects of their professional and private lives, the 2021 survey next asked respondents to shift their gaze to the future and relay their work-related expectations. Will they have the opportunity to work remotely once the pandemic is over? Do they expect they will work from home? And how do their anticipated post-pandemic work arrangements align with their personal preferences?

WORK DAYS & REMOTE WORK PATTERNS

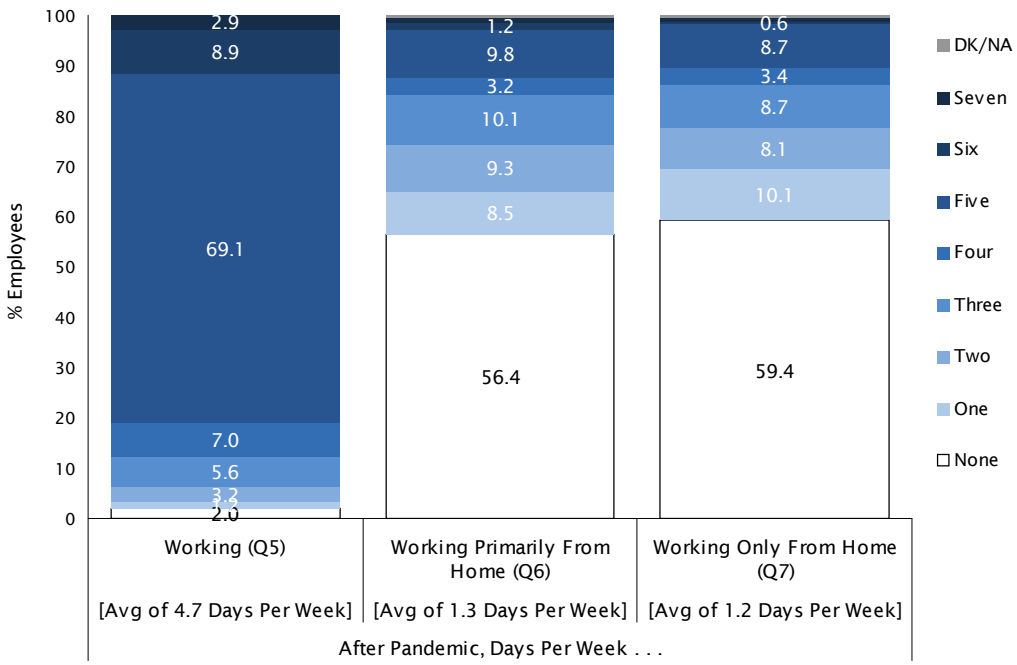
Looking ahead to the post-pandemic period, more than two-thirds of employees (69%) in 2021 anticipated they would work five days per week, and an additional 12% expected to work six or seven days per week (Figure 216). When compared to the pandemic period, the average number of days employees expected to work increased slightly from 4.6 to 4.7 once the pandemic is over.

2021 Survey, Question 19 *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. After the pandemic is over, how many days per week do you expect to work?*

2021 Survey, Question 20 *Of the <insert from Q19> work days per week, how many of these days do you expect to primarily work from home after the pandemic.*

2021 Survey, Question 21 *Of the <insert from Q20> days you will primarily work from home, how many days do you expect to work from home the entire day and not commute to a separate work site?*

FIGURE 216 DAYS EXPECTED TO WORK AFTER PANDEMIC PER WEEK, EXPECTATIONS IN 2021



With respect to *where* they will be working, 44% of employees indicated in 2021 they expected to work from home at least one day per week during the post-pandemic period, which represents a decline from 54% during the pandemic. The average number of days employees expected to work from home also declined from 2.1 (pandemic period) to 1.3 once the pandemic is over. Similarly, excluding split days, the average number of days employees expected to work exclusively from home declined from 1.9 during the pandemic to 1.2 once the pandemic is over. Figures 217-220 show how the average number of work days and days working from home anticipated during the post-pandemic period varied across employee subgroups.

FIGURE 217 DAYS EXPECTED TO WORK AFTER PANDEMIC PER WEEK, EXPECTATIONS IN 2021 BY AGE, GENDER, INDEPENDENT CONTRACTOR & SURVEY LANGUAGE

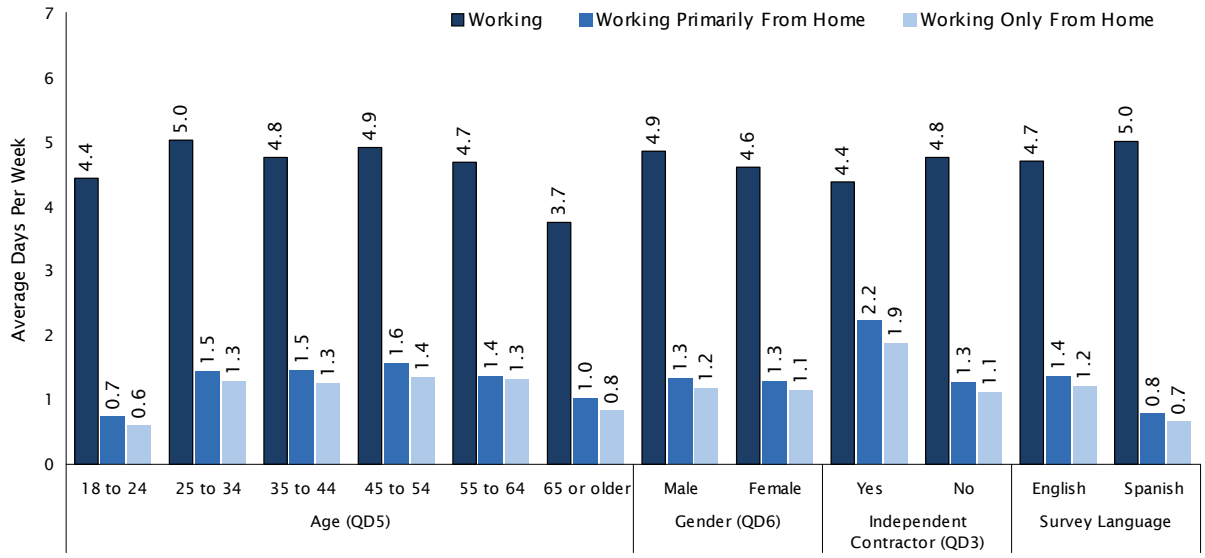


FIGURE 218 DAYS EXPECTED TO WORK AFTER PANDEMIC PER WEEK, EXPECTATIONS IN 2021 BY ETHNICITY & HOUSEHOLD INCOME

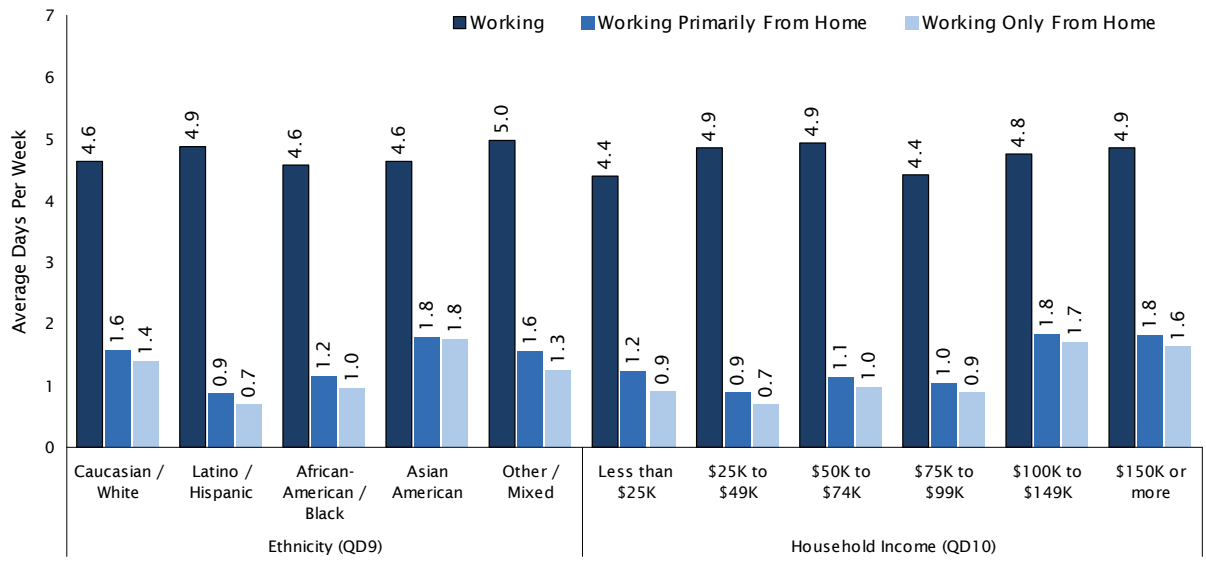


FIGURE 219 DAYS EXPECTED TO WORK AFTER PANDEMIC PER WEEK, EXPECTATIONS IN 2021 BY SAN DIEGO COUNTY SUBREGION & NUMBER OF EMPLOYEES AT COMPANY

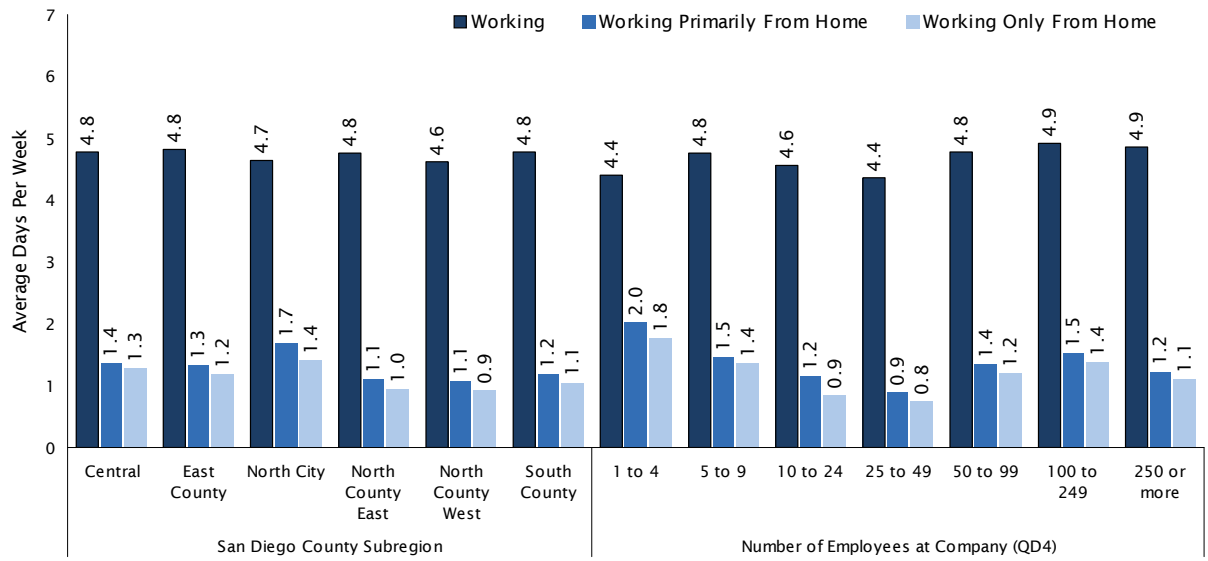


FIGURE 220 DAYS EXPECTED TO WORK AFTER PANDEMIC PER WEEK, EXPECTATIONS IN 2021 BY INDUSTRY

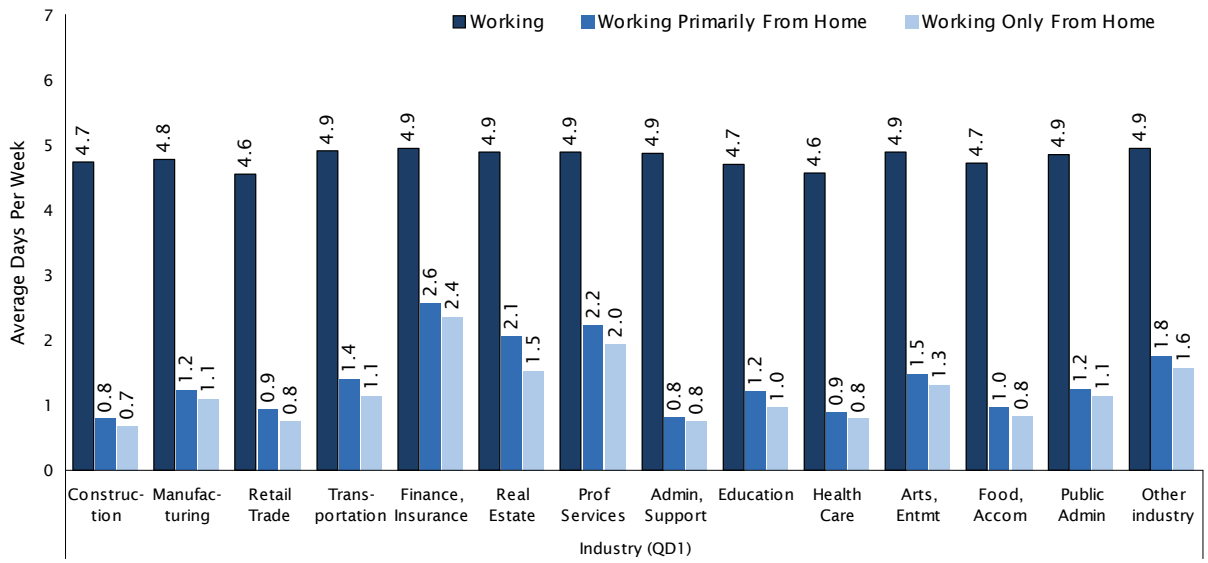
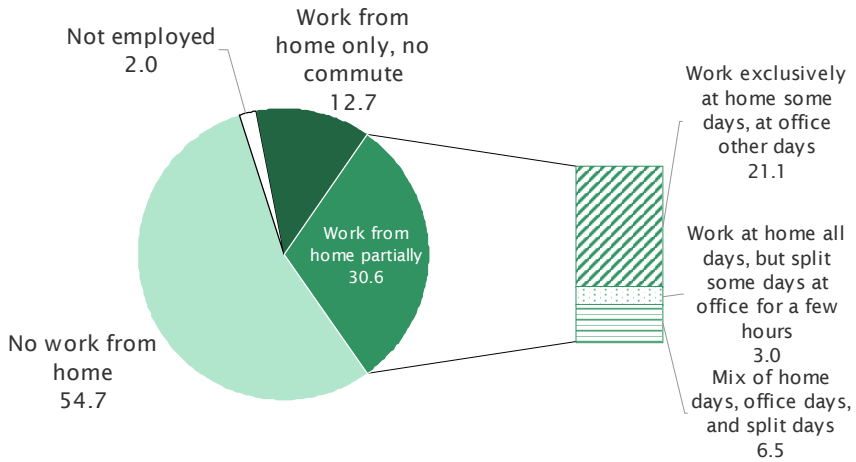


Figure 221 on the next page summarizes employees' expected work patterns once the pandemic is over, documenting the percentage of employees who fit into specific work arrangement categories. When asked in 2021 about their post-pandemic expectations, 55% of employees indicated they expected to work exclusively *away* from their home. Approximately 13% anticipated working exclusively from their home once the pandemic is over, which is well below the percentage working exclusively from home during the pandemic (33%) while remaining higher than the corresponding percentage prior to the pandemic (8%). In 2021, it appeared that many of the employees working exclusively from home during the pandemic anticipated shifting to a hybrid model, as the percentage of employees who anticipated working from home on a partial basis once the pandemic is over (31%) was higher than that found during the pandemic

(21%) and pre-pandemic (15%) periods. Most employees who anticipated working at home on a partial basis post-pandemic also expected to work exclusively at home some days and exclusively at the office other days (21%) as opposed to working from home all day with a few split days at the office (3%) or having a mixed of home days, office days, and split days (7%).

FIGURE 221 REMOTE WORK AFTER PANDEMIC, EXPECTATIONS IN 2021



Figures 222-225 show how various subgroups of employees surveyed in 2021 expected to be distributed among the main work arrangement categories once the pandemic is over. Although the percentages were different than found in the pandemic period, the tendency for remote work to occur more often among independent contractors, high-earning households, and those in certain industries (finance and insurance, real estate and professional services) remained the same.

FIGURE 222 REMOTE WORK AFTER PANDEMIC, EXPECTATIONS IN 2021 BY AGE, GENDER, INDEPENDENT CONTRACTOR & SURVEY LANGUAGE

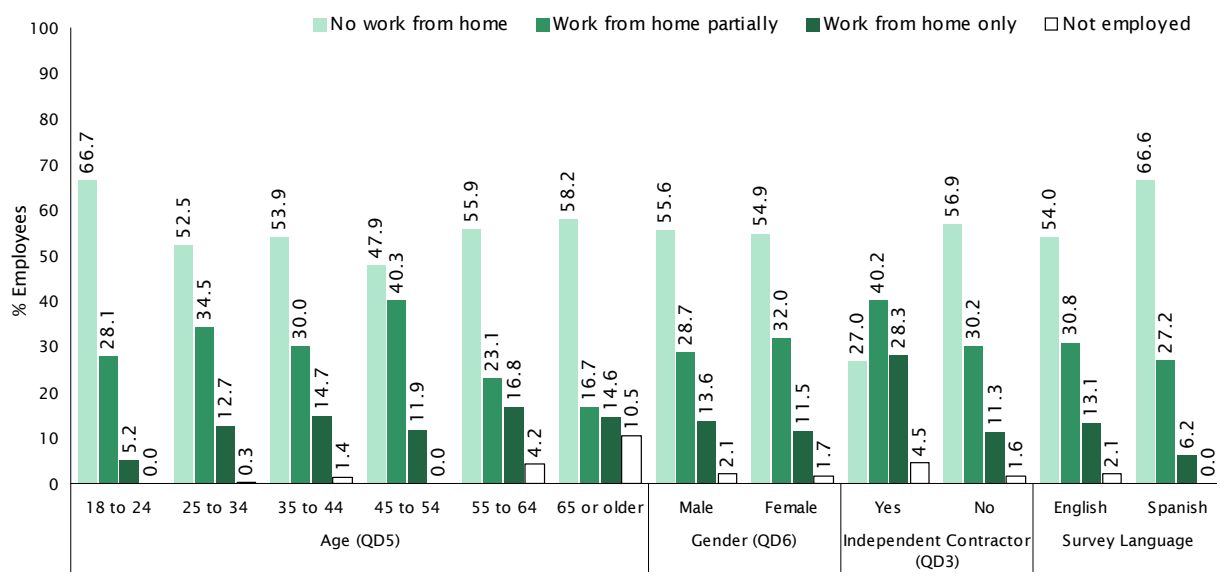


FIGURE 223 REMOTE WORK AFTER PANDEMIC, EXPECTATIONS IN 2021 BY ETHNICITY & HOUSEHOLD INCOME

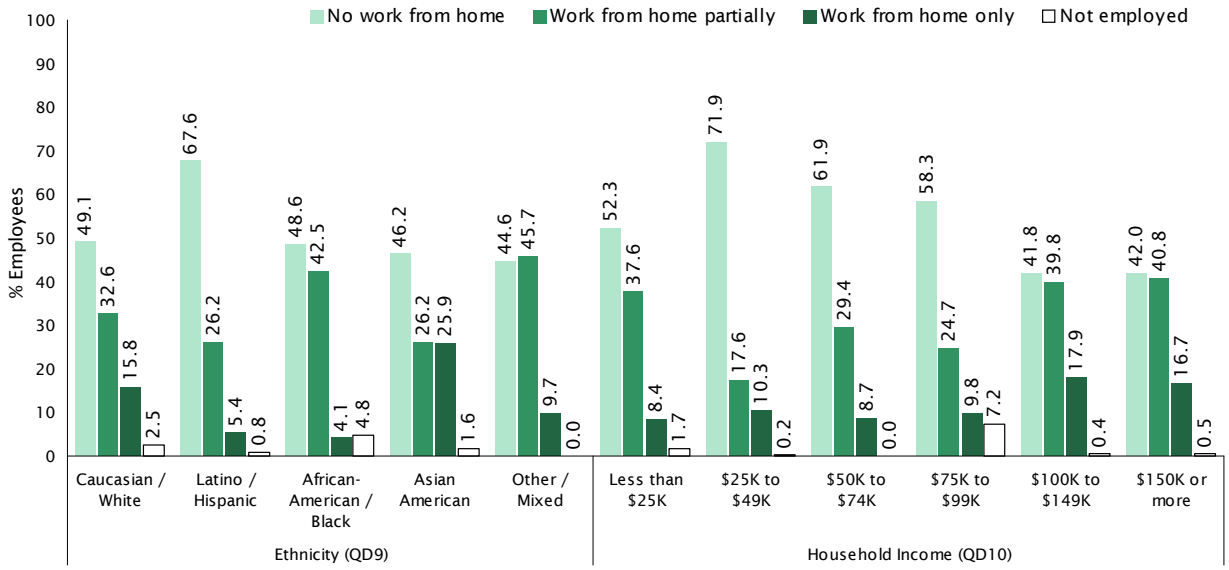


FIGURE 224 REMOTE WORK AFTER PANDEMIC, EXPECTATIONS IN 2021 BY SAN DIEGO COUNTY SUBREGION & NUMBER OF EMPLOYEES AT COMPANY

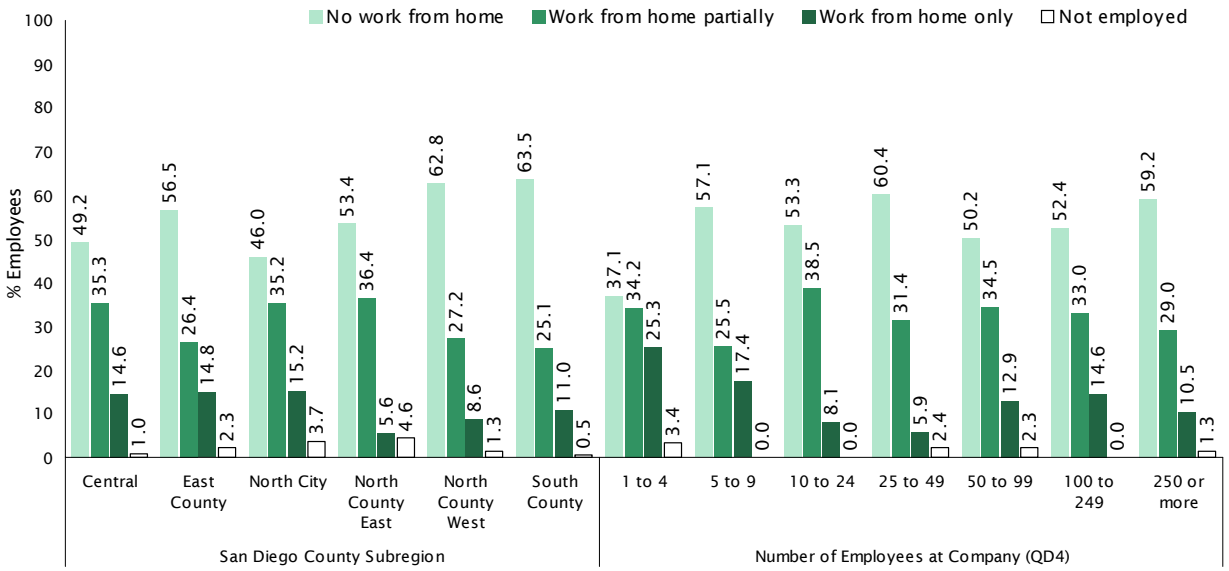


FIGURE 225 REMOTE WORK AFTER PANDEMIC, EXPECTATIONS IN 2021 BY INDUSTRY

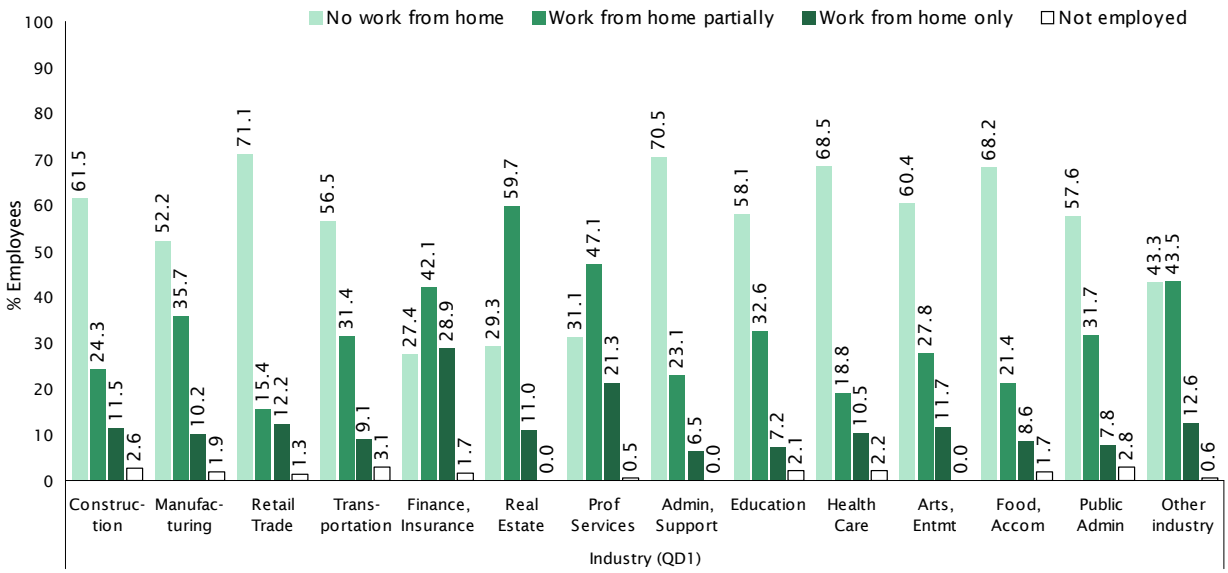
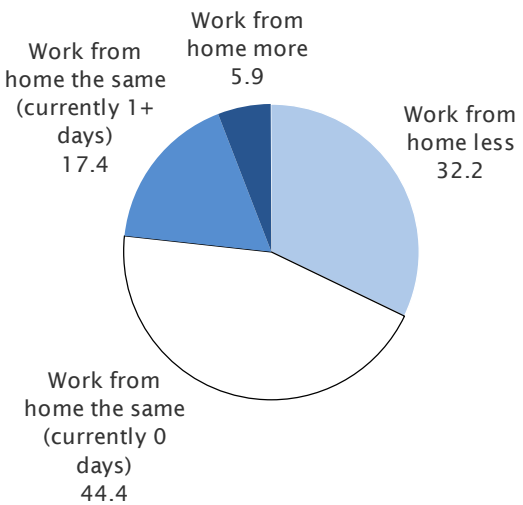


Figure 226 compares work arrangements during the pandemic vs. post-pandemic expectations at the *individual* level. Approximately 44% of employees surveyed in 2021 indicated that they did not work remotely during the pandemic, nor did they expect to work remotely once the pandemic is over. Employees who worked remotely at least one day per week in 2021 were divided between those who expected to work from home less often (32%), the same amount (17%), or more often (6%) after the pandemic when compared to their pandemic schedule.

FIGURE 226 REMOTE WORK AFTER PANDEMIC, EXPECTATIONS IN 2021 VS DURING PANDEMIC



When compared to their respective counterparts, employees from higher-earning households and those in education, manufacturing, professional services, and other industries had the highest percentage anticipating in 2021 that they would work *less often* from home once the pandemic is over (see Figures 227-230).

FIGURE 227 REMOTE WORK AFTER PANDEMIC, EXPECTATIONS IN 2021 VS DURING PANDEMIC, EXPECTATIONS IN 2021 BY AGE, GENDER, INDEPENDENT CONTRACTOR & SURVEY LANGUAGE

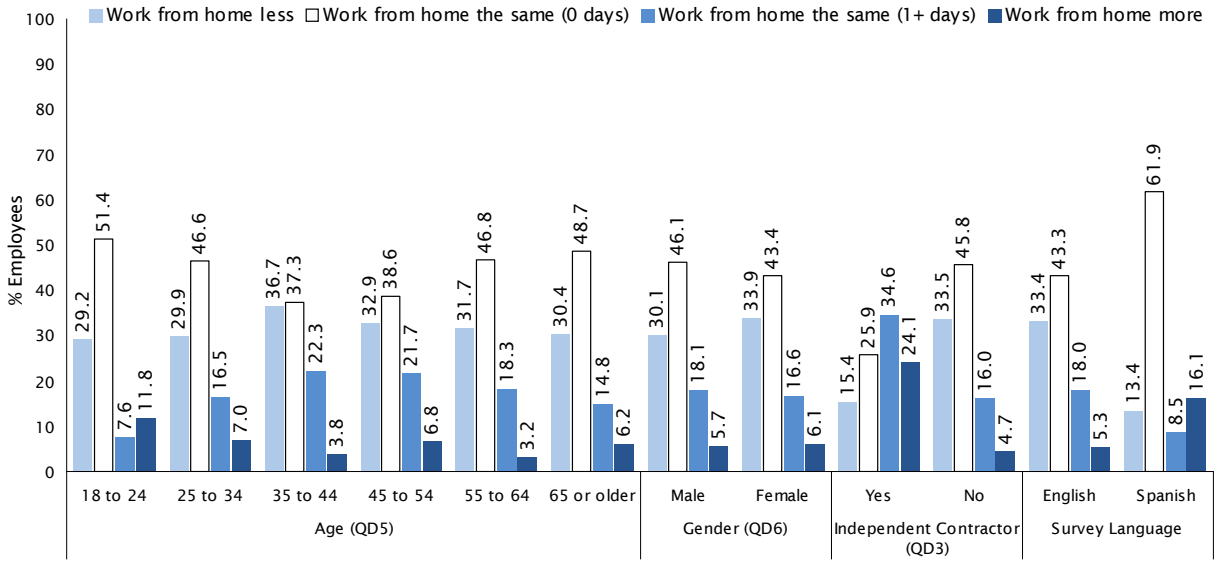


FIGURE 228 REMOTE WORK AFTER PANDEMIC, EXPECTATIONS IN 2021 VS DURING PANDEMIC BY ETHNICITY & HOUSEHOLD INCOME

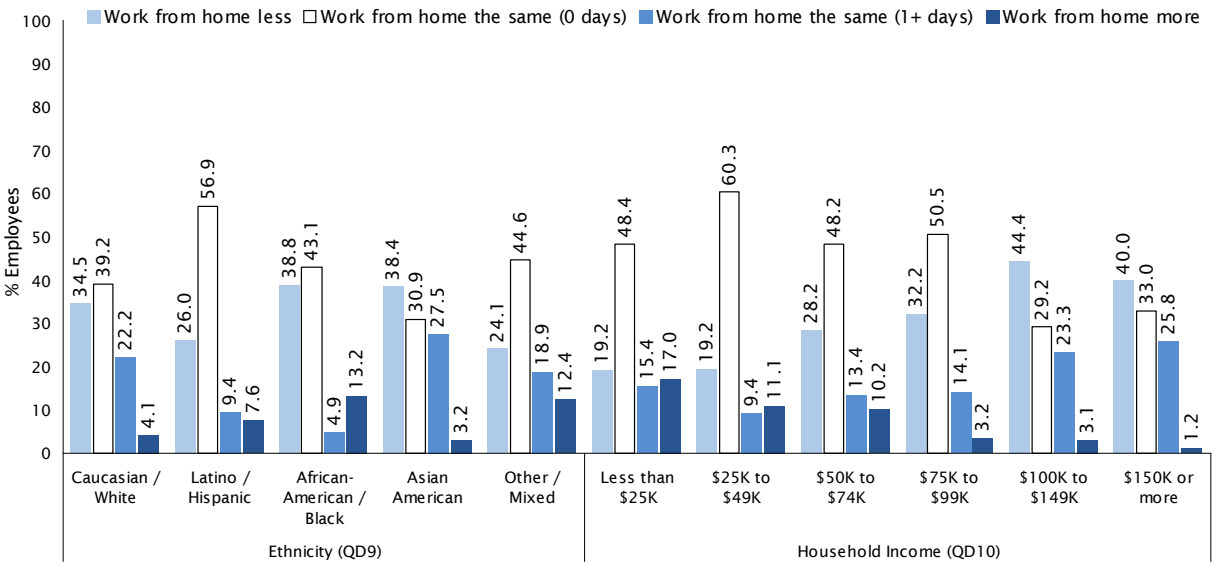


FIGURE 229 REMOTE WORK AFTER PANDEMIC, EXPECTATIONS IN 2021 VS DURING PANDEMIC BY SAN DIEGO COUNTY SUBREGION & NUMBER OF EMPLOYEES AT COMPANY

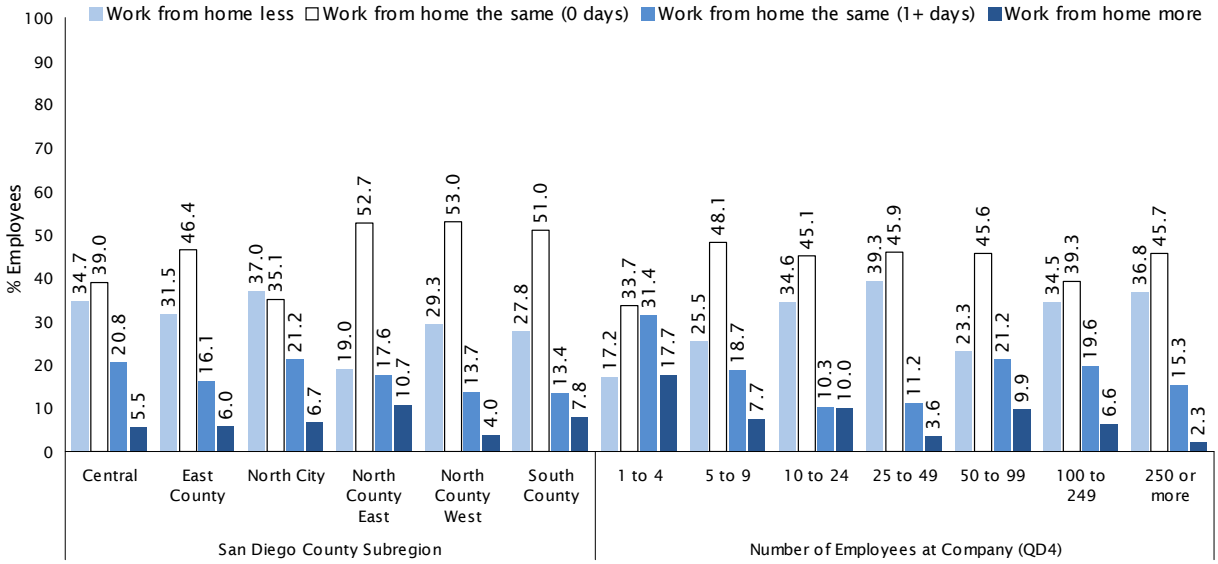
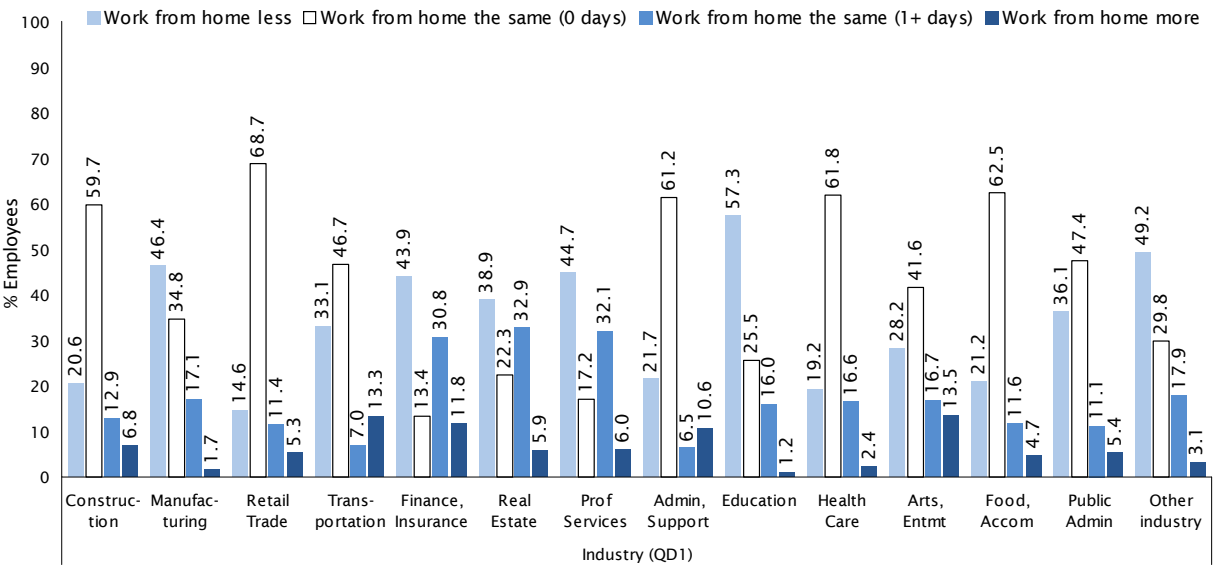


FIGURE 230 REMOTE WORK AFTER PANDEMIC, EXPECTATIONS IN 2021 VS DURING PANDEMIC BY INDUSTRY



WORKING REMOTE LESS AFTER PANDEMIC - WHOSE PREFERENCE?

Employees who reported in 2021 that they anticipated working fewer days from home after the pandemic when compared to their pandemic schedule were subsequently asked whether that was their personal preference (Question 22) and whether their employer would allow them to continue working from home the same number of days as their pandemic schedule (Question 23). The answers to both questions are combined in Figure 231.

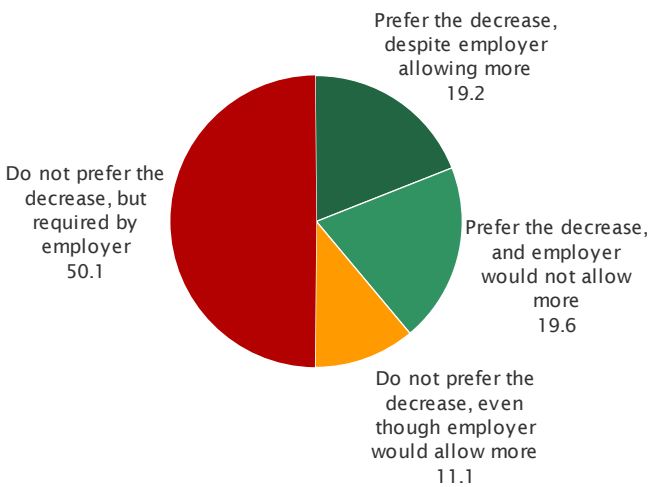
Half of the employees (50%) who indicated that they anticipated working remotely less often after the pandemic indicated that it was *not* their preference, but their employer required the change. An additional 11% indicated the change was not their preference and their employer did

not require a change, thus suggesting a separate factor was motivating their reduction in remote working.[19] Approximately four-in-ten employees surveyed in 2021 *preferred* to decrease the number of days they work remotely once the pandemic is over, with this group being evenly split between those whose employers did not require the change (19%) and those whose employers also sought to reduce their days working remotely (20%).

2021 Survey, Question 22 *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?*

2021 Survey, Question 23 *After the pandemic, will your employer allow you to continue working from home <insert Q10> days per week?*

FIGURE 231 OPINION OF WORKING FEWER DAYS FROM HOME AFTER PANDEMIC, EXPECTATIONS IN 2021



NO CHANGE TO REMOTE WORK AFTER PANDEMIC - WHOSE PREFERENCE?

Employees who reported in 2021 that they anticipated working the same number of days from home after the pandemic when compared to their pandemic schedule[20] were subsequently asked whether that was their personal preference (Question 24) and whether their employer will require that employees work from home at least part of the time, post-pandemic (Question 25). The answers to both questions are combined in Figure 232.

More than half of employees (56%) who indicated that they anticipated working remotely the same amount after the pandemic indicated that it was their preference, although their employer did not require remote work. An additional 23% indicated that keeping their pandemic remote work schedule after the pandemic was their preference, but their employer will also require employees to work from home at least part time after the pandemic is over. Approximately one-

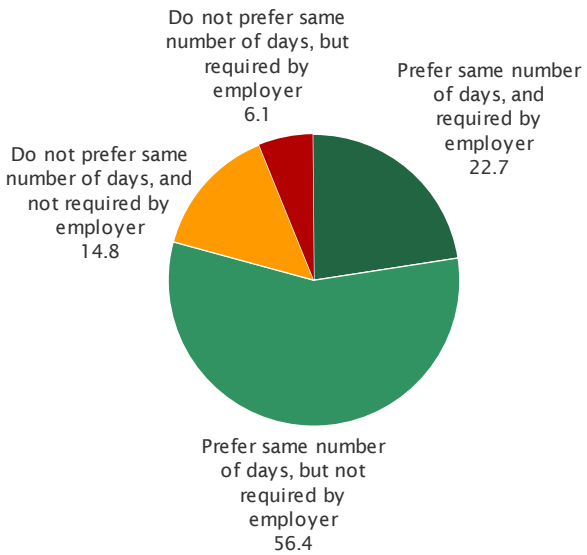
19. There are a variety of external factors that could compel an employee to reduce their remote work, including housing arrangements, a need to take children to/from school near their work location, difficulty sharing a home office with a spouse, etc.
20. For clarity, employees who reported zero remote work days during the current period *and* expected zero remote work days after the pandemic were removed from this analysis.

in-five employees indicated in 2021 that they did *not* prefer to keep their same remote work schedule once the pandemic is over, with this group being split between those whose employers did not require remote work (15%) and those whose employers mandated that employees work from home at least part of the time (6%).[21]

2021 Survey, Question 24 *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?*

2021 Survey, Question 25 *Has your employer indicated that - after the pandemic - employees must work from home at least part of the time?*

FIGURE 232 OPINION OF WORKING SAME DAYS FROM HOME AFTER PANDEMIC, EXPECTATIONS IN 2021



WORKING REMOTE MORE AFTER PANDEMIC - WHOSE PREFERENCE? Finally, employees who reported that they anticipated working more days from home after the pandemic when compared to their 2021 schedule were subsequently asked whether that was their personal preference (Question 24) and whether their employer will require that employees work from home at least part of the time, post-pandemic (Question 25). The answers to both questions are combined in Figure 233.

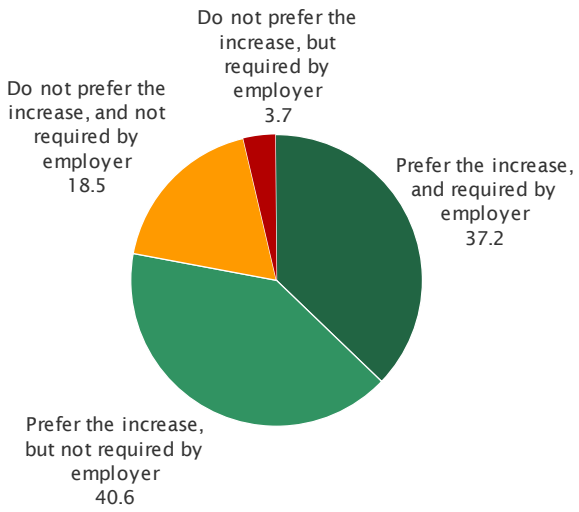
More than three-quarters of employees (78%) who anticipated working more days from home after the pandemic reported that it was their preference to do so, with this group being divided between those whose employers did not require remote work (41%) and those whose employers mandated that employees work from home at least part time (37%). Among the 22% of employees who did not prefer the anticipated increase in remote work days after the pandemic, most also indicated that it was not required by their employer (19%), while few (4%) indicated that their employer required the change.

21. Note that among employees who preferred to *not* keep their current remote work schedule, some may prefer to increase their remote work days, while others may prefer to decrease the days they work remotely.

2021 Survey, Question 26 *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?*

2021 Survey, Question 27 *Has your employer indicated that - after the pandemic - employees must work from at least part of the time?*

FIGURE 233 OPINION OF WORKING MORE DAYS FROM HOME AFTER PANDEMIC, EXPECTATIONS IN 2021



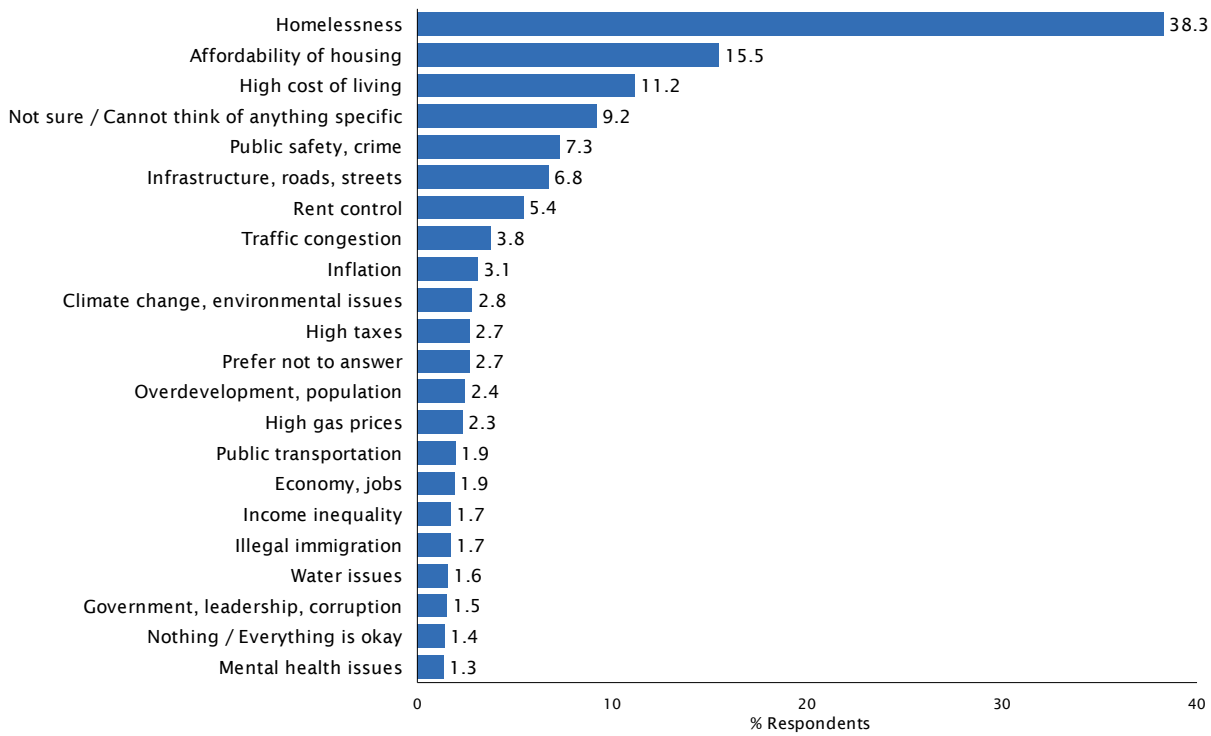
Employees: Most Important Issue Facing County Post-Pandemic (2023)

The 2023 Employee Survey opened by asking respondents to identify what they think is the most important issue facing San Diego County today. Question 2 was presented in an open-ended manner, thereby allowing employees to mention any issue that came to mind without being prompted by or restricted to a particular list of options. True North subsequently reviewed the verbatim responses and grouped them into the categories shown in Figure 234 below.

Among the specific issues identified, concerns about homelessness were dominant (38%), followed by affordability of housing (16%), high cost of living in general (11%), public safety/ crime (7%), and the condition of infrastructure, streets, and roads (7%). Approximately 9% of respondents could not think of an important issue facing San Diego County as a whole, while 1% indicated that there are no issues—everything is okay. Considering the research objectives of this study, it is striking that the pandemic and/or COVID-19 was not mentioned by at least 1% of respondents in 2023.

2023 Survey, Question 2 *Thinking about San Diego County as a whole, what would you say is the most important issue facing San Diego County today?*

Figure 234 Most Important Issue Facing San Diego County



EMPLOYEES: POST-PANDEMIC (2023)

Having profiled employees' work arrangements and primary commute modes prior to the pandemic, during the pandemic, and their post-pandemic expectations when asked in 2021, the 2023 tracking survey asked these same questions for the *current* period—post-pandemic.

WORK DAYS & REMOTE WORK PATTERNS

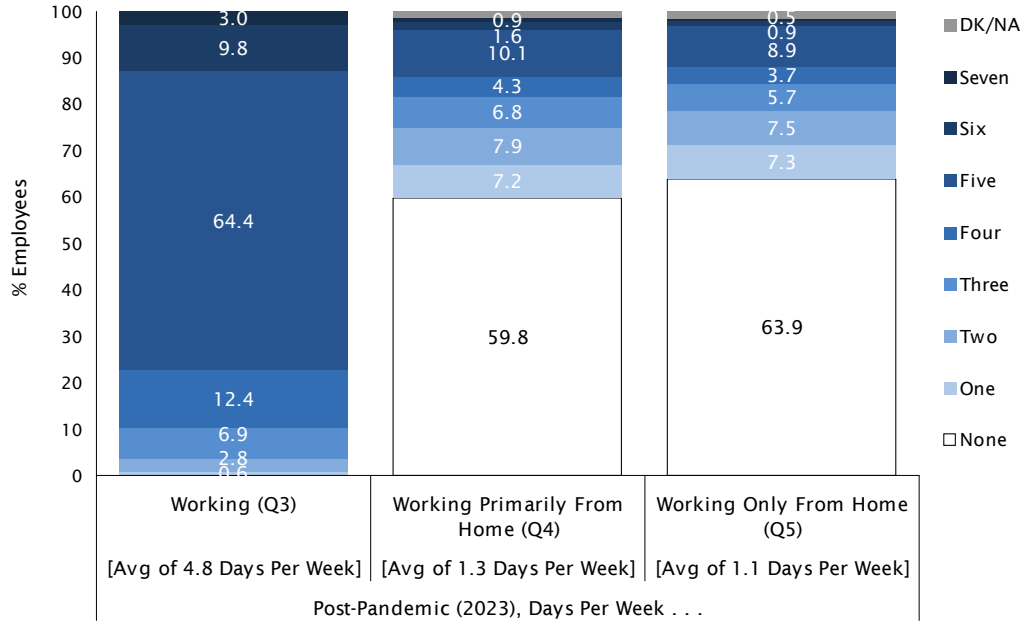
Most employees (64%) reported that they work five days per week during the post-pandemic period (Figure 235), which is the same as reported during the pandemic in 2021. That said, the average number of days worked per week increased slightly from 4.6 during the pandemic to 4.8 post-pandemic.

2023 Survey, Question 3 *Currently, how many days per week do you typically work?*

2023 Survey, Question 4 *Of the <insert from Q3> work days per week you typically work, how many of these days do you primarily work from home?*

2023 Survey, Question 5 *Of the <insert from Q4> days you primarily work from home, how many days do you typically work from home the entire day without commuting to a separate work site?*

FIGURE 235 DAYS WORKED POST-PANDEMIC (2023) PER WEEK



Although the number of days worked per week did not change much between the pandemic and post-pandemic periods, *where* the work was conducted did change. The percentage of employees working from home at least one day per week declined from 54% during the pandemic to 39% in 2023, while the percentage who primarily work from home five or more days per week declined from 31% during the pandemic to 10% post-pandemic. Among all employees, the average number of days worked primarily from home decreased from 2.1 during the pandemic to 1.3 in 2023. Similarly, the average number of days employees worked *exclusively* from home decreased from 1.9 during the pandemic to 1.1 post-pandemic.

Figures 236-239 present the average number of days worked, average days worked primarily from home, and average days worked exclusively from home in the post-pandemic period across various subgroups of employees. The most striking differences in the average number of days worked remotely continue to occur by industry and household income, with higher income households and those working in finance and insurance, real estate, and professional services working from home more often than their counterparts. When compared to the pandemic period, the average days worked remotely declined dramatically among those in the education sector, and a gap has also opened up between independent contractors and those classified as employees. The average number of days worked remotely also declined among employees in companies with 5 or more people, but remained similar to pandemic patterns among employees working for small companies (less than 5 people).

FIGURE 236 DAYS WORKED POST-PANDEMIC (2023) PER WEEK BY AGE, GENDER, INDEPENDENT CONTRACTOR & SURVEY LANGUAGE

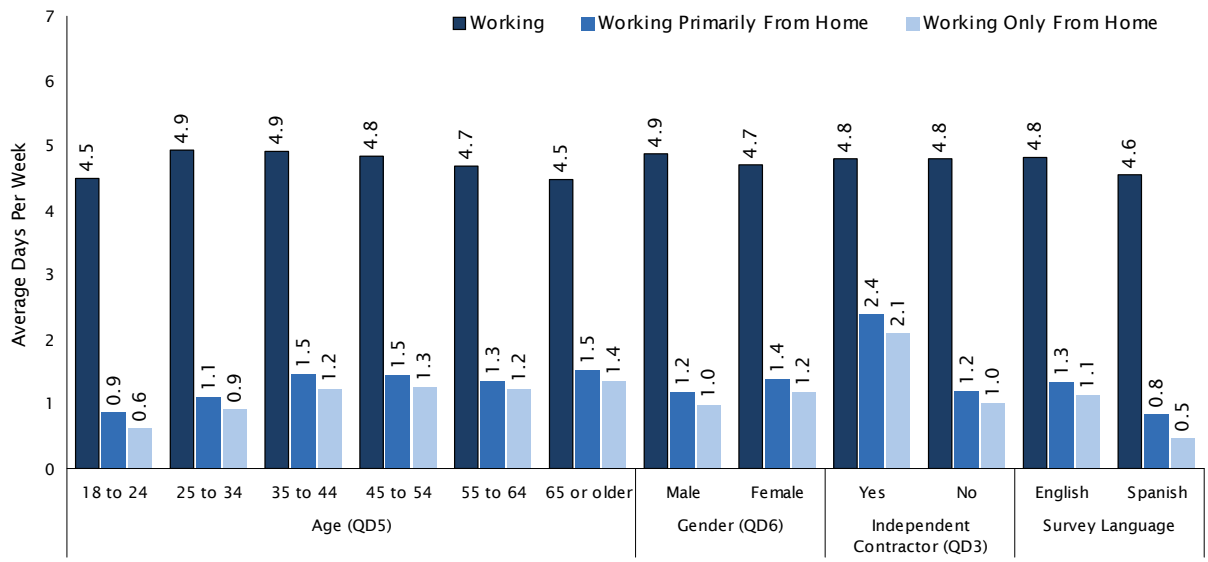


FIGURE 237 DAYS WORKED POST-PANDEMIC (2023) PER WEEK BY ETHNICITY & HOUSEHOLD INCOME

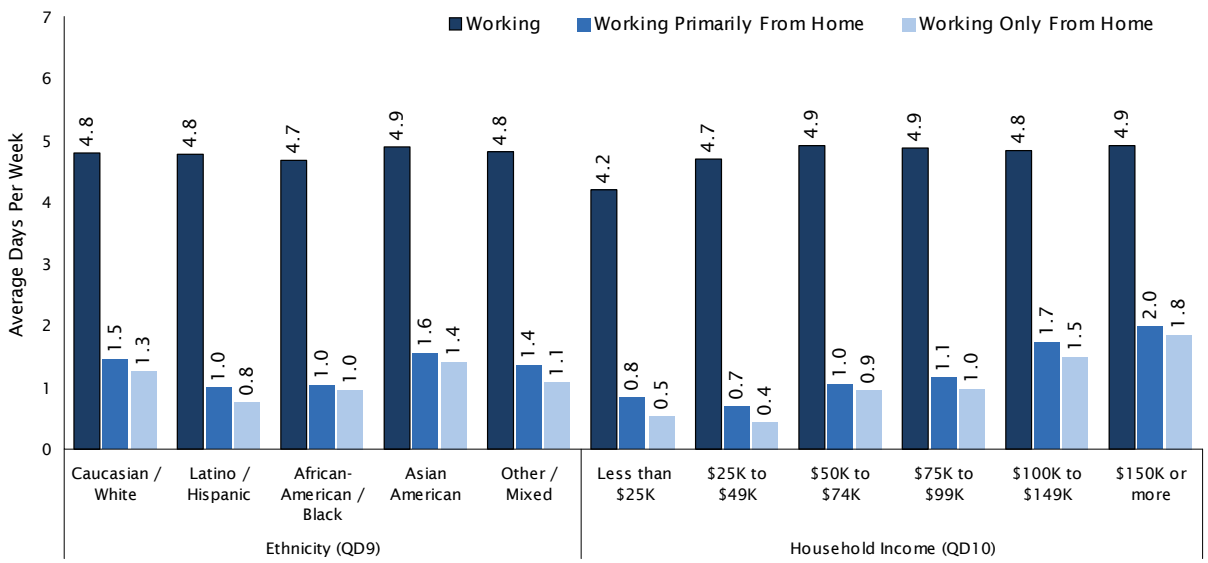


FIGURE 238 DAYS WORKED POST-PANDEMIC (2023) PER WEEK BY SAN DIEGO COUNTY SUBREGION & NUMBER OF EMPLOYEES AT COMPANY

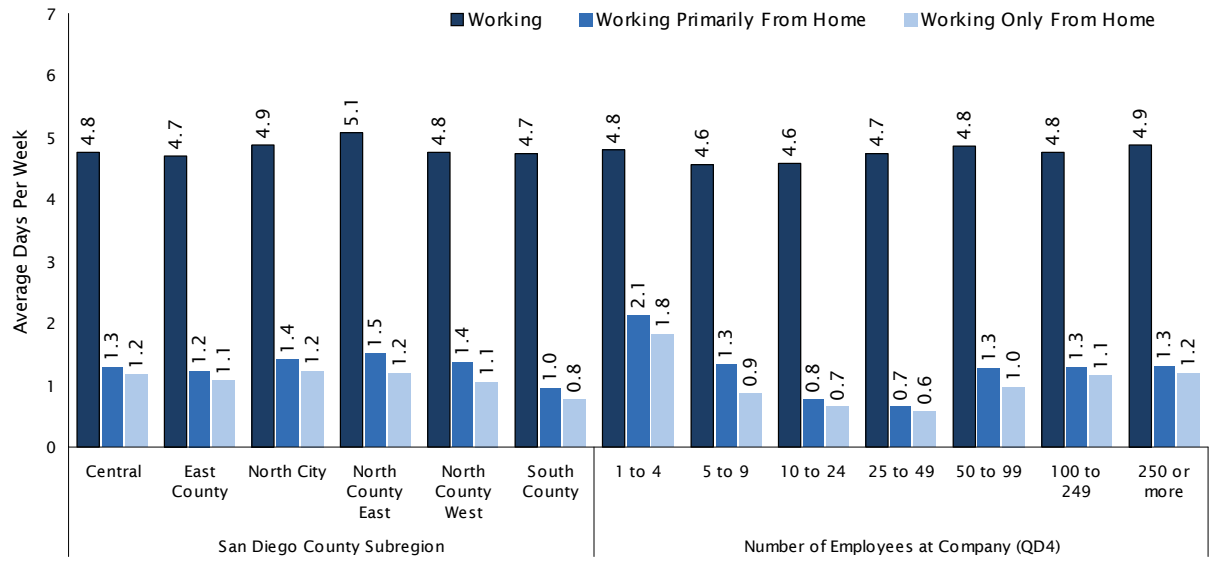


FIGURE 239 DAYS WORKED POST-PANDEMIC (2023) PER WEEK BY INDUSTRY

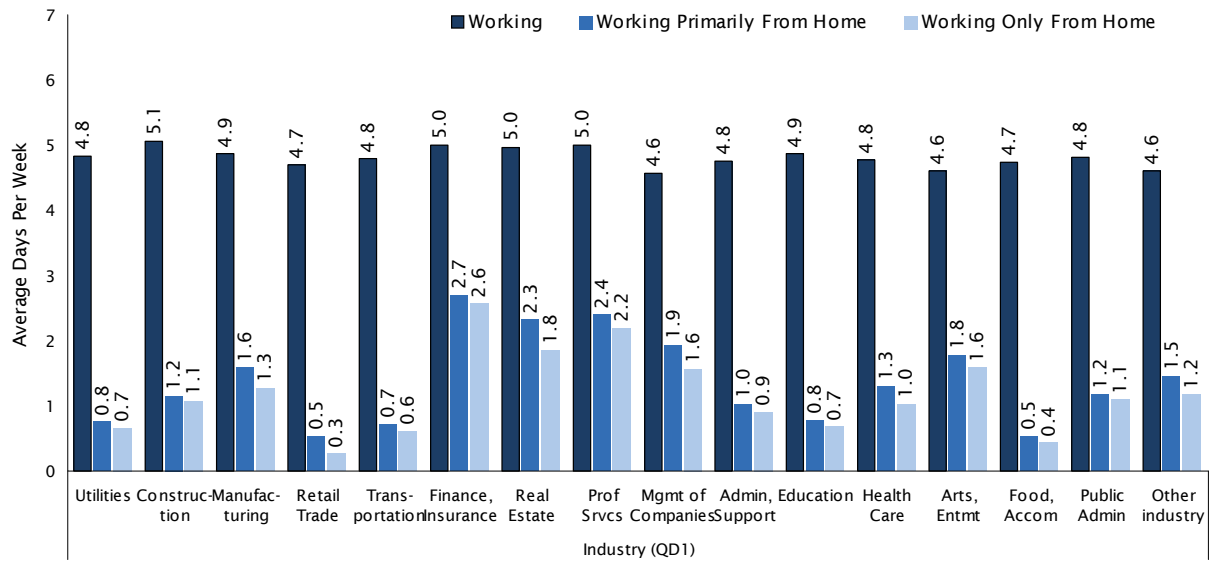


Figure 240 on the next page summarizes employees' work patterns in the post-pandemic period, documenting the percentage of employees who fit into specific work arrangement categories. Whereas during the pandemic 46% of employees surveyed reported that they never worked from home, 61% of employees post-pandemic indicated they work exclusively *away* from their home. Meanwhile, 12% of employees are working exclusively from home, down from 33% during the pandemic. Of the 21% who are currently working from home on a partial basis, 17% work exclusively at home some days and exclusively at an office other days, 3% work from home all days of the week, but split some days at the office for a few hours, and 7% work a mix of days at home, at the office, and split days. Figures 241-244 show how various subgroups of employees are distributed among the main work arrangement categories in the post-pandemic period.

FIGURE 240 REMOTE WORK POST-PANDEMIC (2023)

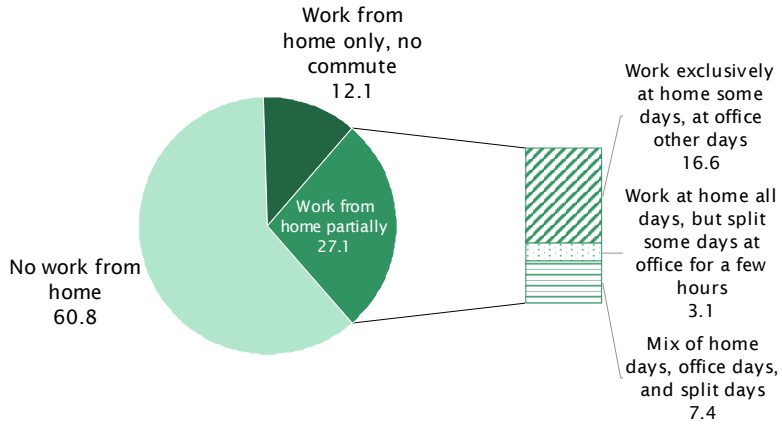


FIGURE 241 REMOTE WORK POST-PANDEMIC (2023) BY AGE, GENDER, INDEPENDENT CONTRACTOR & SURVEY LANGUAGE

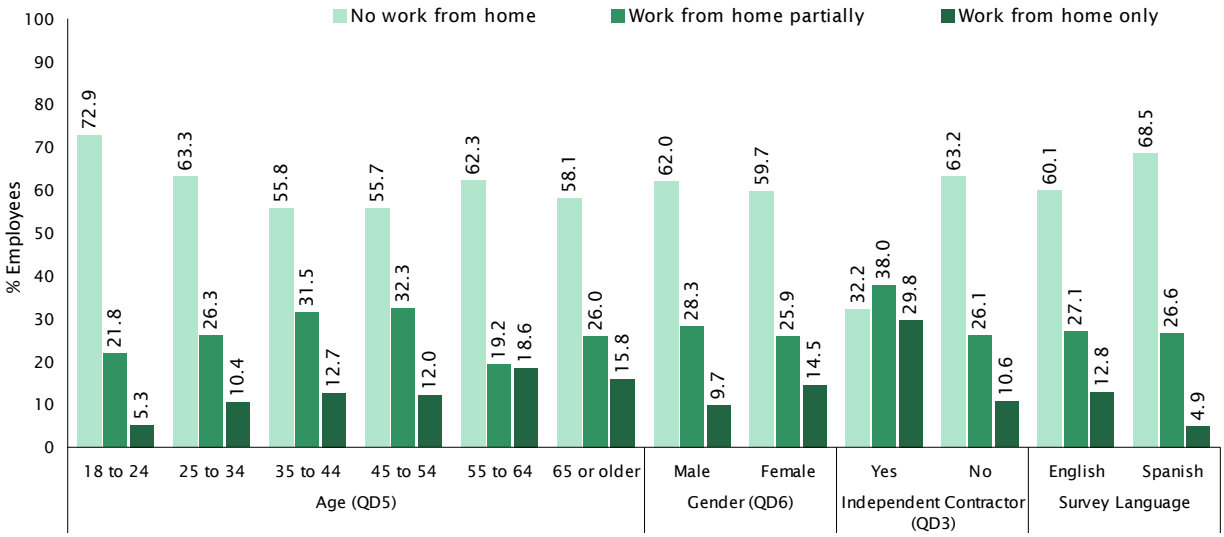


FIGURE 242 REMOTE WORK POST-PANDEMIC (2023) BY ETHNICITY & HOUSEHOLD INCOME

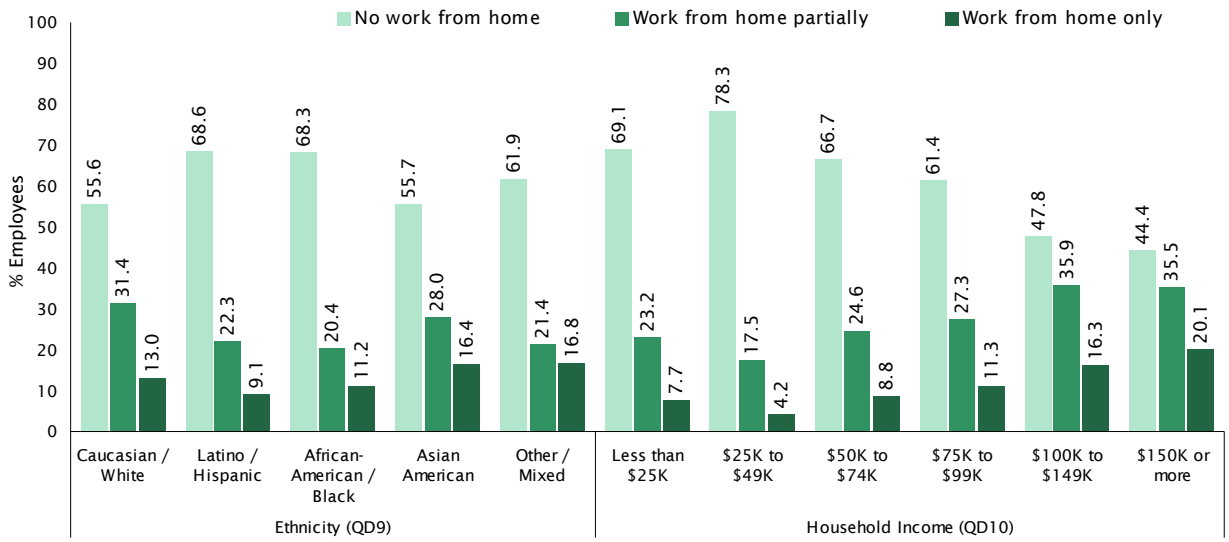


FIGURE 243 REMOTE WORK POST-PANDEMIC (2023) BY SAN DIEGO SUBREGION & NUMBER OF EMPLOYEES AT COMPANY

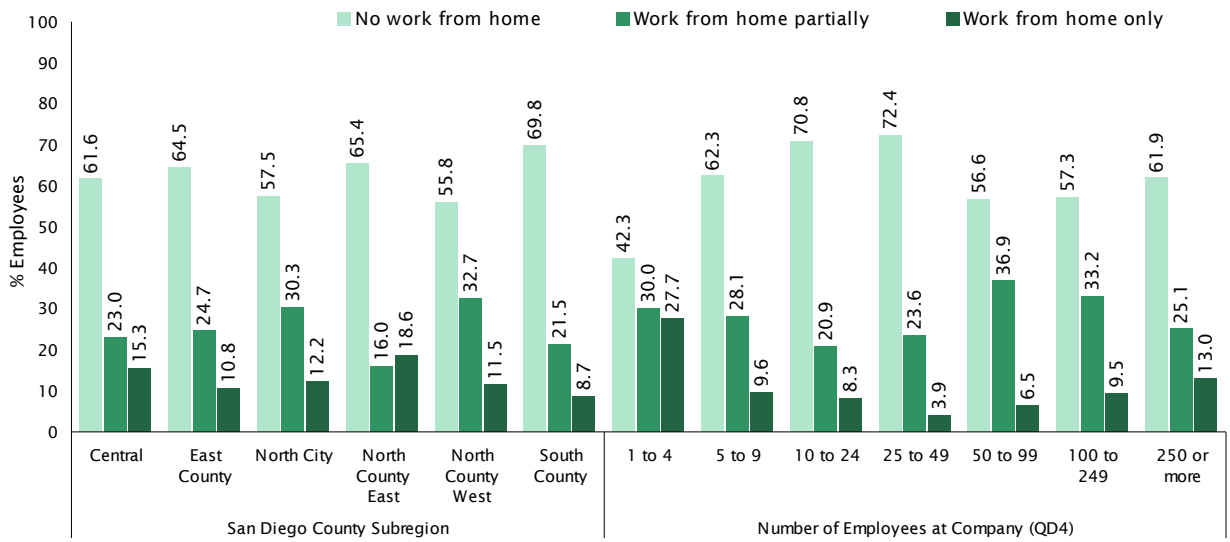
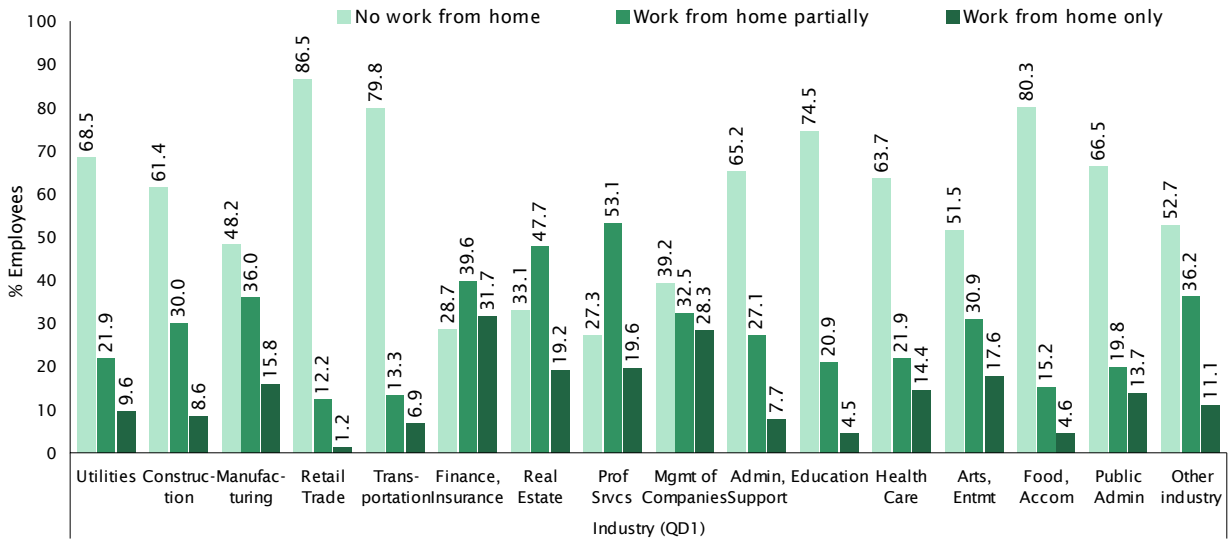


FIGURE 244 REMOTE WORK POST-PANDEMIC (2023) BY INDUSTRY



REMOTE WORK OPTION Approximately 60% of employees indicated that they had the option to work from home at least one day per week during the pandemic in 2021. In the post-pandemic period, the corresponding percentage is somewhat lower at 45% (Figure 245), although it varies substantially by industry, occupation, company size, household income, and subregion (see Figures 246-250). At the extremes, just 13% of individuals working in protective services indicated they have the option to work remotely, whereas more than 90% of architects and engineers have the option to work from home. In general, those working in blue-collar industries and occupations and those in lower-income households were less likely than their counterparts to report having the option to work remotely in the post-pandemic period.

2023 Survey, Question 12 *Does your employer currently give you the option to work from home at least one day per week?*

FIGURE 245 EMPLOYER CURRENTLY GIVES THE OPTION TO WORK FROM HOME

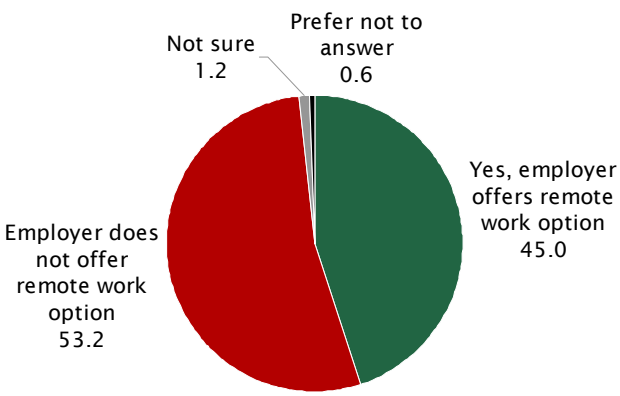


FIGURE 246 EMPLOYER CURRENTLY GIVES THE OPTION TO WORK FROM HOME BY INDUSTRY

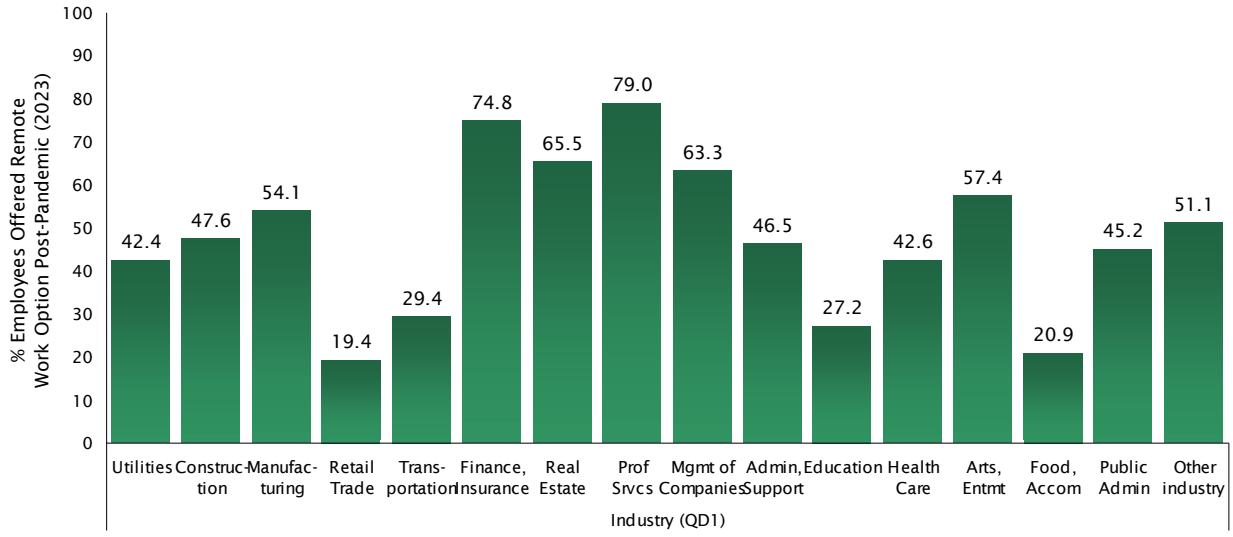


FIGURE 247 EMPLOYER CURRENTLY GIVES THE OPTION TO WORK FROM HOME BY OCCUPATION

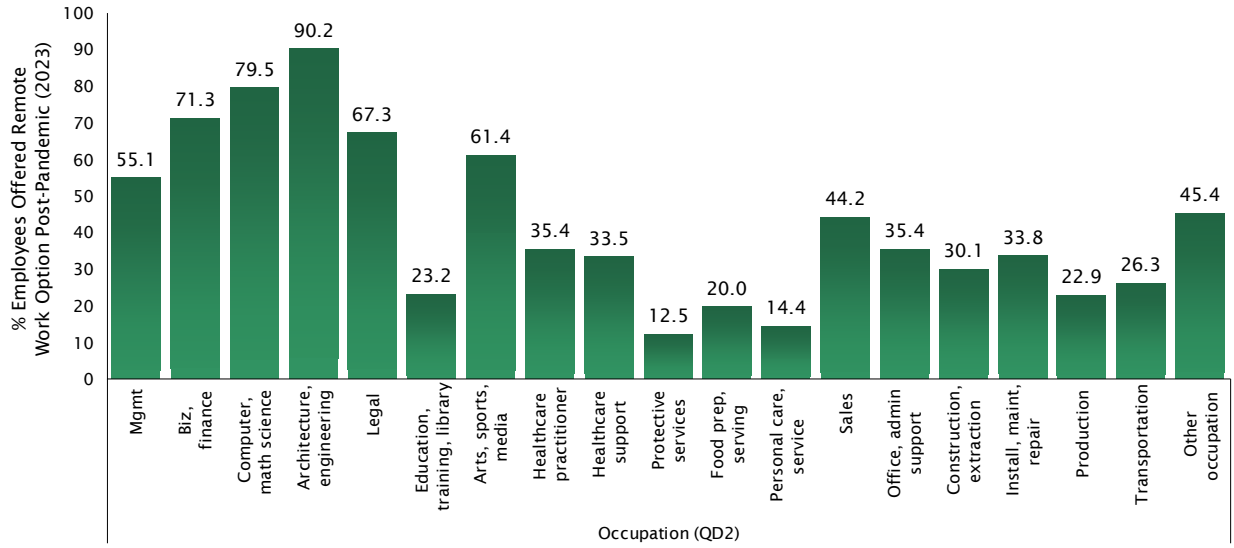


FIGURE 248 EMPLOYER CURRENTLY GIVES THE OPTION TO WORK FROM HOME BY NUMBER OF EMPLOYEES AT COMPANY, INDEPENDENT CONTRACTOR & SURVEY LANGUAGE

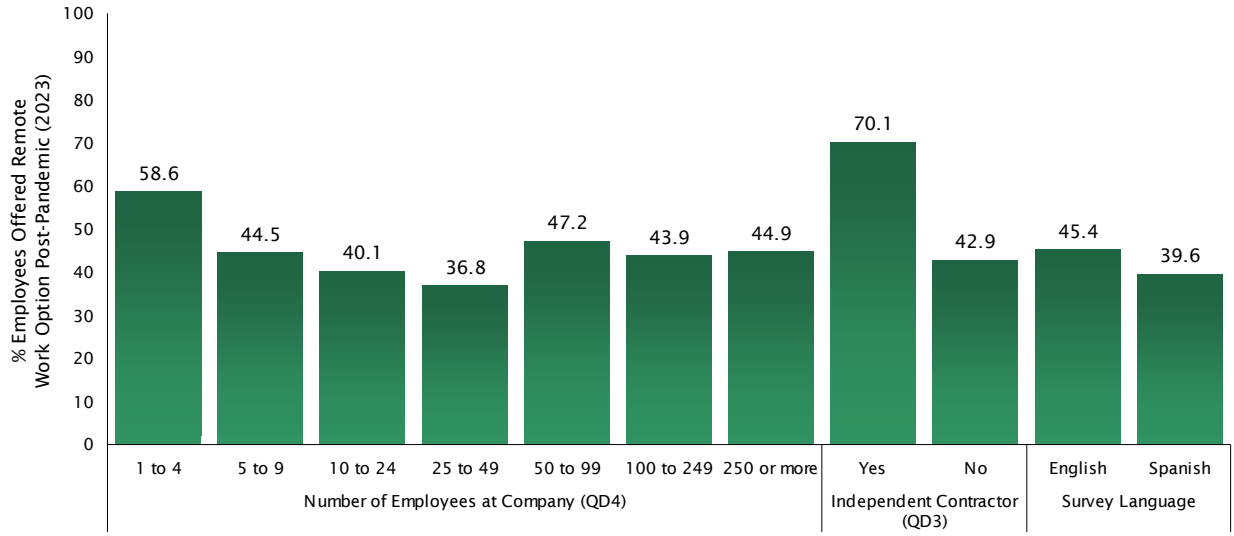


FIGURE 249 EMPLOYER CURRENTLY GIVES THE OPTION TO WORK FROM HOME BY AGE & ETHNICITY

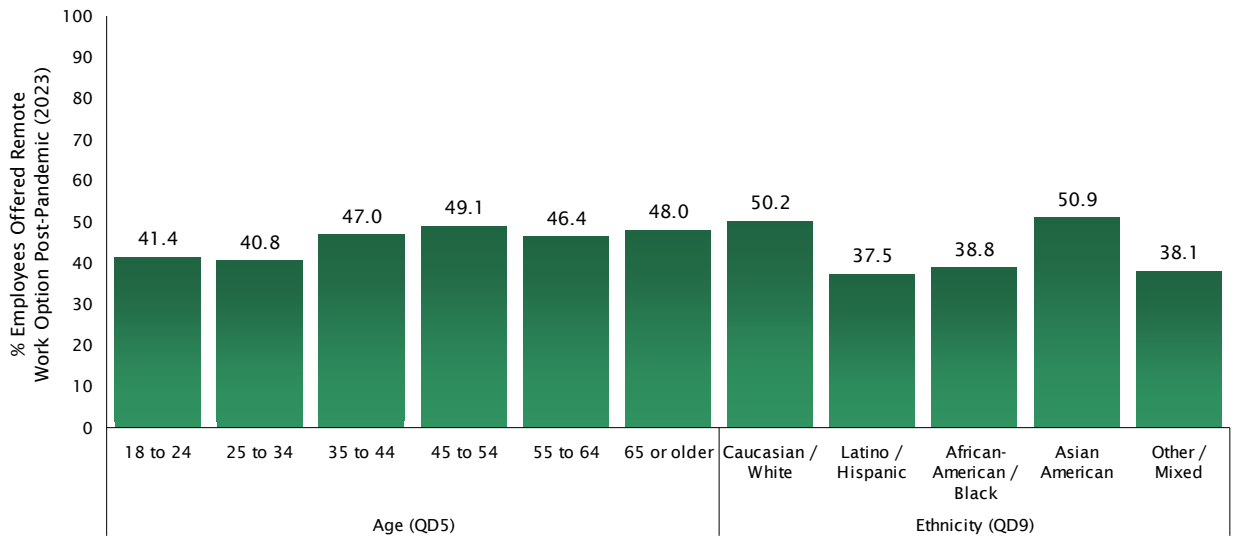
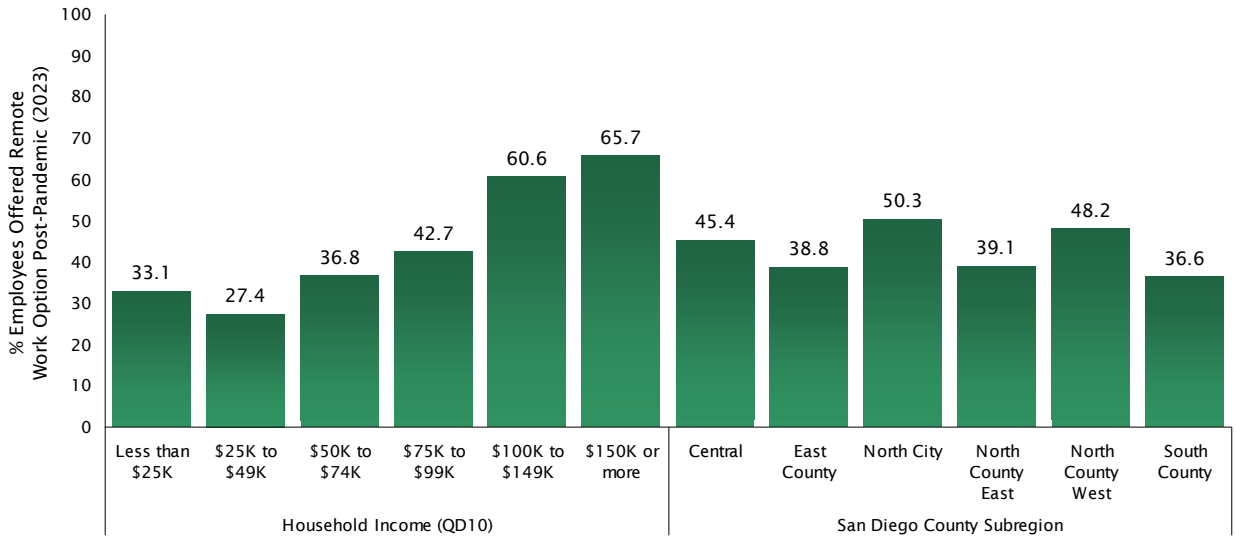


FIGURE 250 EMPLOYER CURRENTLY GIVES THE OPTION TO WORK FROM HOME BY HOUSEHOLD INCOME & SAN DIEGO COUNTY SUBREGION



CAN YOU CHANGE YOUR REMOTE WORK DAYS? Employees who reported that they work remotely at least one day per week were asked in the 2023 tracking survey whether they have the flexibility to change *which* days of the week they work from home. As shown below in Figure 251, most employees (62%) indicated they have the option to change the days of the week that they work remotely, whereas approximately one-third (34%) stated they have set days that they can't change. Approximately 4% were unsure or preferred to not answer the question. Figures 252 and 253 on the next page show that a majority of employees in all subgroups had the option to change which days of the which they work from home.

2023 Survey, Question 11 *Do you have the flexibility to change which days of the week you work from home, or do you have set days of the week that you work from home?*

FIGURE 251 FLEXIBILITY TO CHANGE DAYS WORK FROM HOME POST PANDEMIC (2023)

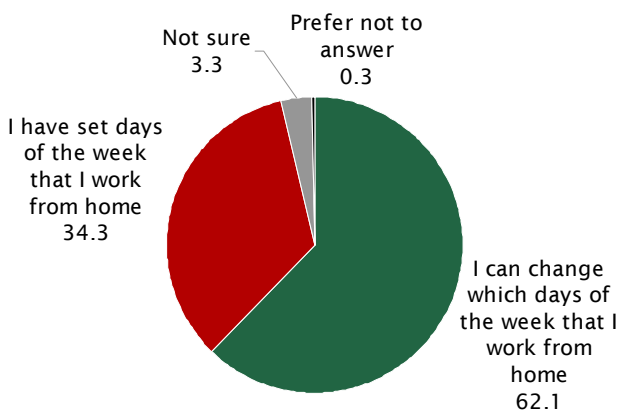


FIGURE 252 FLEXIBILITY TO CHANGE DAYS WORK FROM HOME POST PANDEMIC (2023) BY NUMBER OF EMPLOYEES AT COMPANY, INDEPENDENT CONTRACTOR & SURVEY LANGUAGE

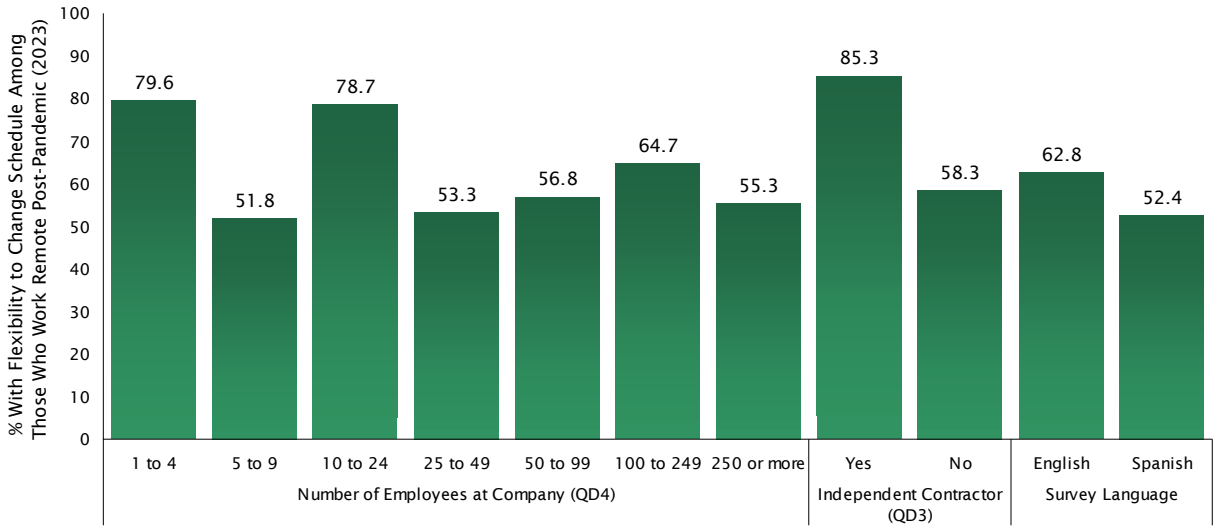
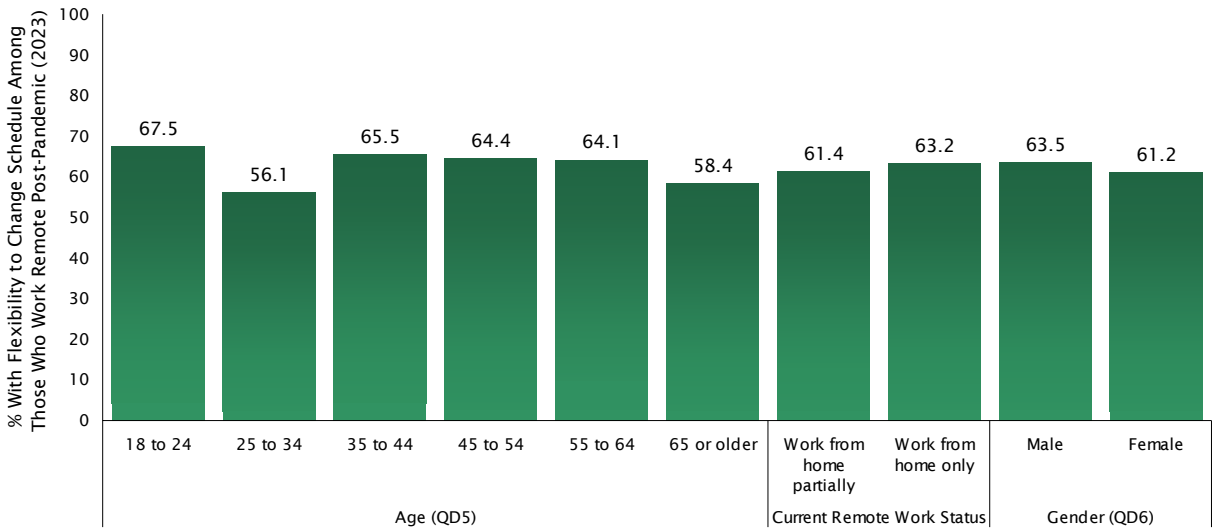


FIGURE 253 FLEXIBILITY TO CHANGE DAYS WORK FROM HOME POST PANDEMIC (2023) BY AGE, CURRENT REMOTE WORK STATUS & GENDER



COMMUTE MODE Respondents in the 2023 tracking survey who indicated they currently commute to a work destination outside of their home at least once per week were asked to identify the method of transportation they use most often when commuting to their work place (see Figure 254). Driving alone to work in a car, truck, SUV or van was the most common method of commuting in the post-pandemic period (79%), followed by carpooling (5%), taking a bus (5%), walking, running or jogging (3%), and taking the Trolley (3%). Collectively, ridesharing (carpool, vanpool, and on-demand rideshare services) accounted for 6% of commutes, transit (bus, Trolley, Coaster, Sprinter, other) accounted for 8% of commutes, and active transportation (biking, walking, jogging, running) was mentioned by 4% as their primary method of commuting to work.

2023 Survey, Question 13 *When you commute to a work destination outside of your home, how do you typically commute to work? If they say they use multiple transportation methods, ask: Which do you use for the longest portion of your commute?*

FIGURE 254 PRIMARY MODE OF TRANSPORTATION TO WORK POST-PANDEMIC (2023)

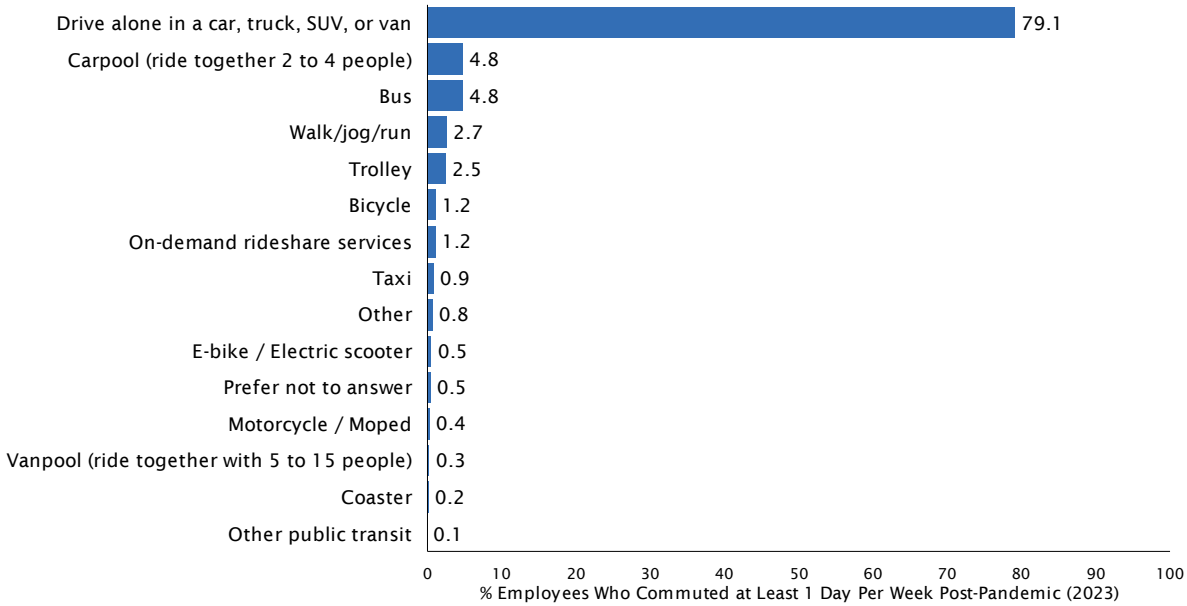


Figure 255 consolidates the various methods of commuting into general categories and places the results in context of *all* employees surveyed. In the post-pandemic period, approximately 12% of employees indicated they do not commute to a separate work site, 60% primarily commute by driving solo, 7% use public transit, 5% primarily commute by carpool/vanpool, and 7% use other modes. Figures 256-258 illustrate how post-pandemic commute patterns and modes varied across subgroups of employees.

FIGURE 255 PRIMARY COMMUTE MODE POST-PANDEMIC (2023)

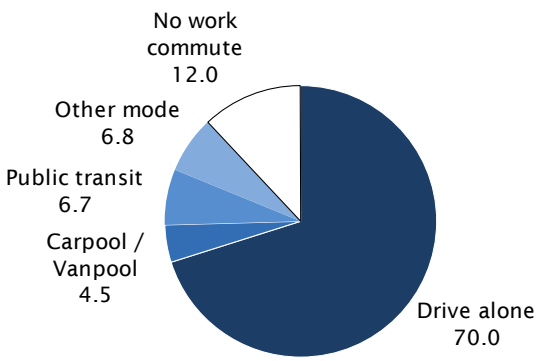


FIGURE 256 PRIMARY COMMUTE MODE POST-PANDEMIC (2023) BY AGE, GENDER, INDEPENDENT CONTRACTOR & SURVEY LANGUAGE

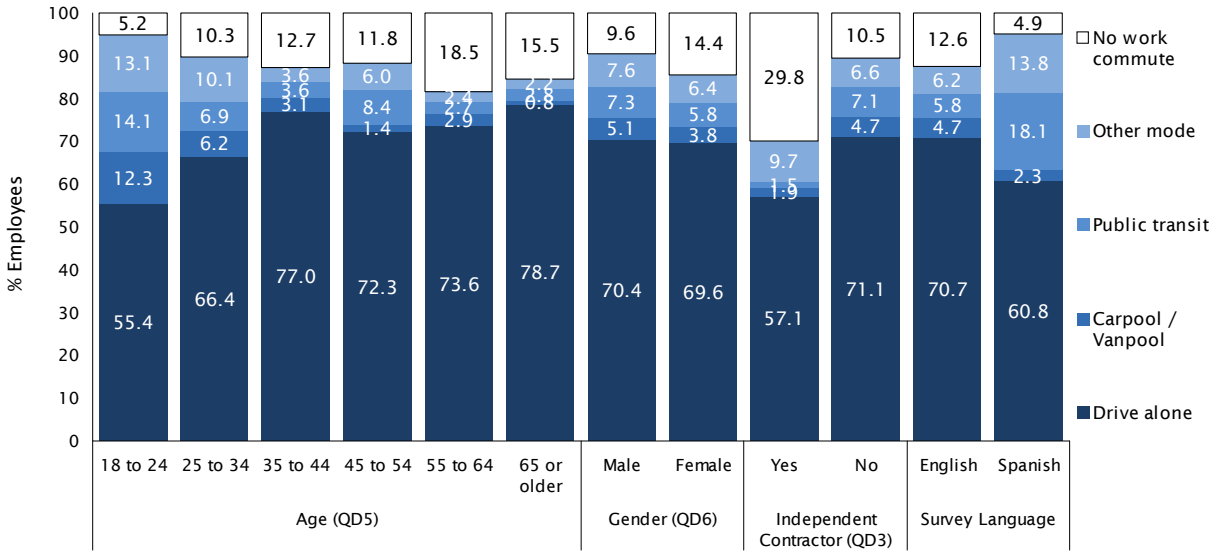


FIGURE 257 PRIMARY COMMUTE MODE POST-PANDEMIC (2023) BY ETHNICITY & HOUSEHOLD INCOME

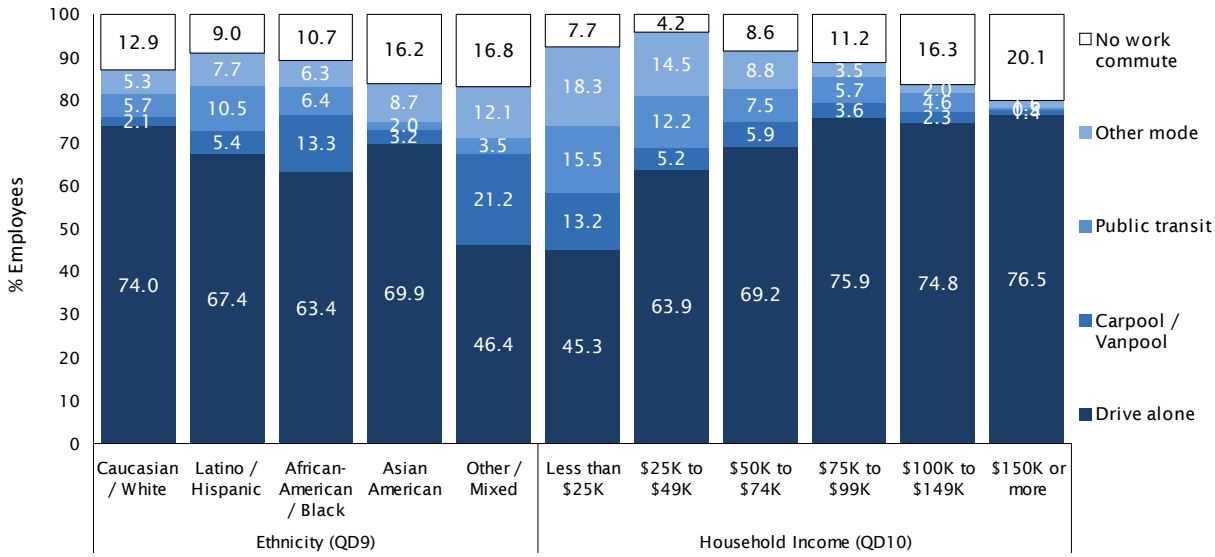
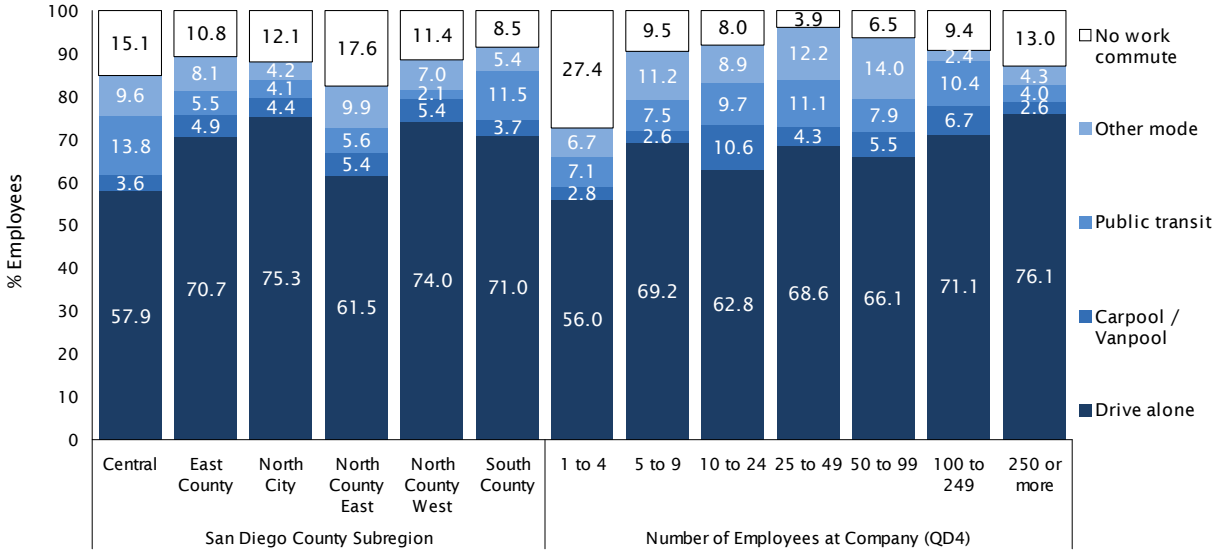


FIGURE 258 PRIMARY COMMUTE MODE POST-PANDEMIC (2023) BY SAN DIEGO COUNTY SUBREGION & NUMBER OF EMPLOYEES AT COMPANY



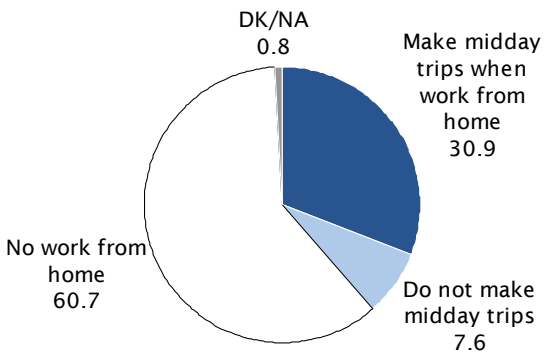
EMPLOYEES: MIDDAY TRIPS (2023)

Intuitively, an increase in remote work arrangements has the potential to reduce vehicle trips, vehicle miles traveled (VMT), and associated emissions. More people working from their home can also help reduce traffic congestion as fewer people are making trips during peak periods. The concern, however, is that those who choose to work from home (rather than the office) also have more opportunity to engage in midday trips for shopping, recreation, and other activities, thereby offsetting the VMT and emissions benefits that would otherwise result from eliminating the work commute. Some studies have even found that telecommuting is likely to *increase* total VMT.[22] In other words, the primary benefits of remote work in terms of trip, VMT, and emissions reductions are more than offset by increases in non-work trips among teleworkers.

DO YOU TAKE MIDDAY TRIPS? To understand the prevalence of midday trips among those who work from home, the 2023 survey asked those who work from home at least one day per week to report on the frequency and timing of their midday trips, as well their mode choice and VMT. Figure 259 shows that among the 39% of respondents who work from home at least one day per week, most (31%) reported that they occasionally leave the house to take midday trips, whereas 8% indicated they do not make midday trips while working from home.

2023 Survey, Question 6 *While working from home, do you occasionally leave the house to take midday trips - such as for going to a store, the post office, picking up kids, or going to get something to eat?*

FIGURE 259 MIDDAY TRIPS WHILE WORKING FROM HOME



Figures 260-263 show how the prevalence of taking midday trips while working from home varied across employee subgroups. Because these figures are in the context of *all* employees, they generally reflect the patterns found previously for remote work arrangements—subgroups that have a higher prevalence of working from home are the same subgroups that have a high incidence of taking midday trips.

22. *Do Telecommuters Make Fewer Trips? An Analysis of Telecommuting Travel Behavior in Urban and Rural Communities in the USA.* International Conference on Transportation and Development 2022. Patrick J. Reilly, Aly M. Tawfik, Ph.D.

FIGURE 260 MIDDAY TRIPS WHILE WORKING FROM HOME BY AGE, GENDER, INDEPENDENT CONTRACTOR & CURRENT REMOTE WORK STATUS

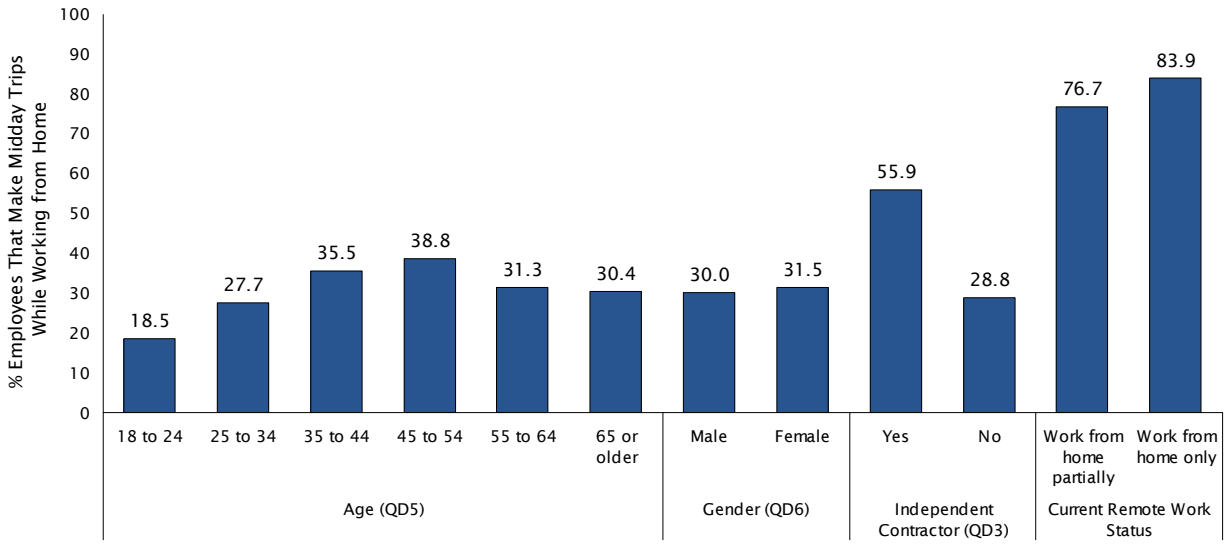


FIGURE 261 MIDDAY TRIPS WHILE WORKING FROM HOME BY ETHNICITY & HOUSEHOLD INCOME

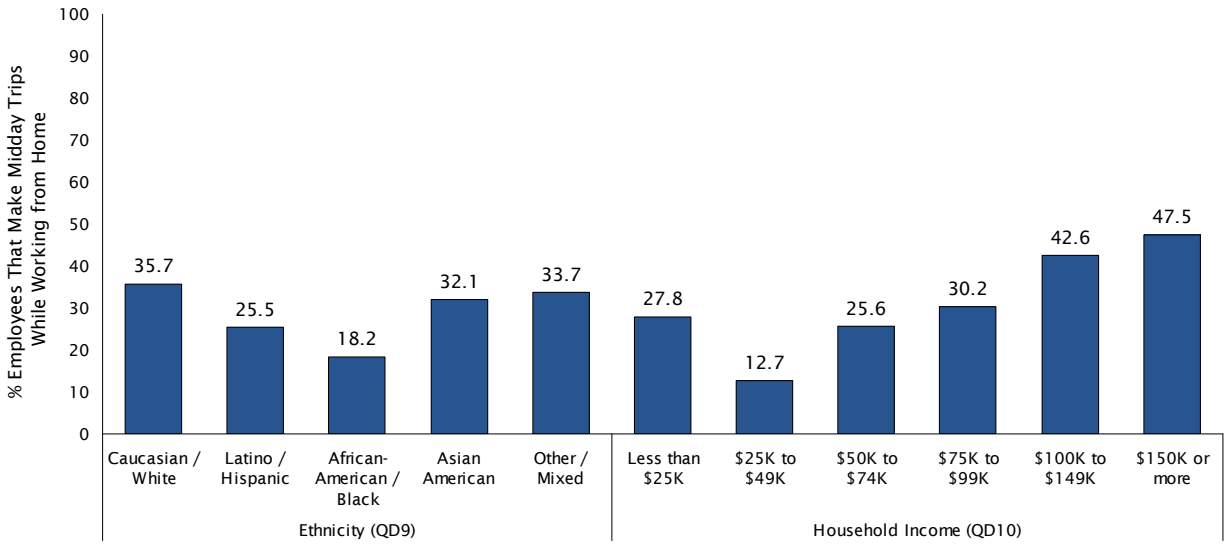


FIGURE 262 MIDDAY TRIPS WHILE WORKING FROM HOME BY SAN DIEGO SUBREGION & NUMBER OF EMPLOYEES AT COMPANY

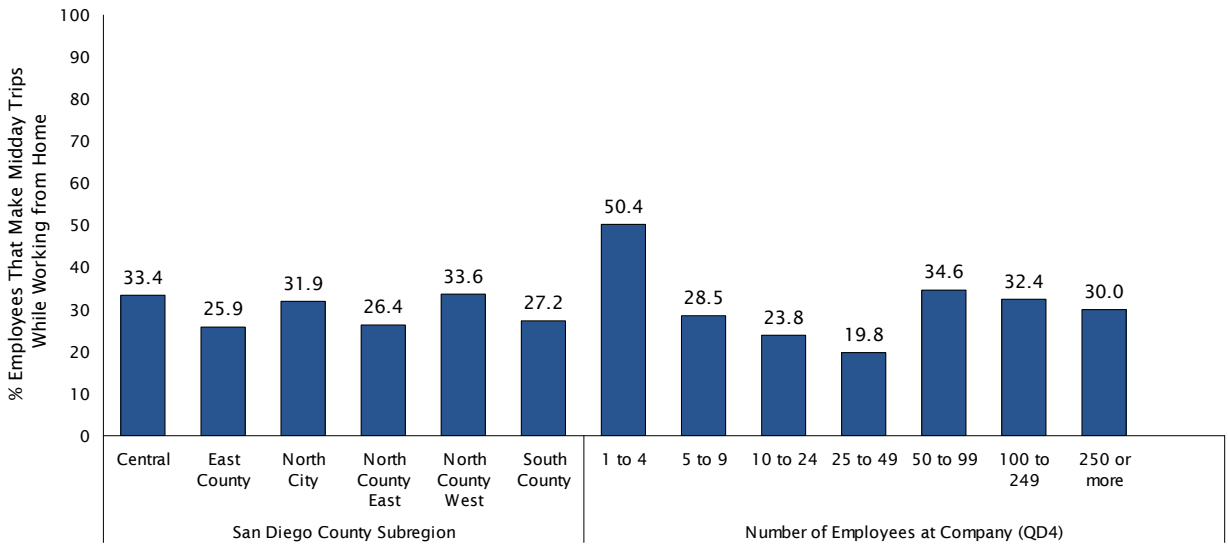
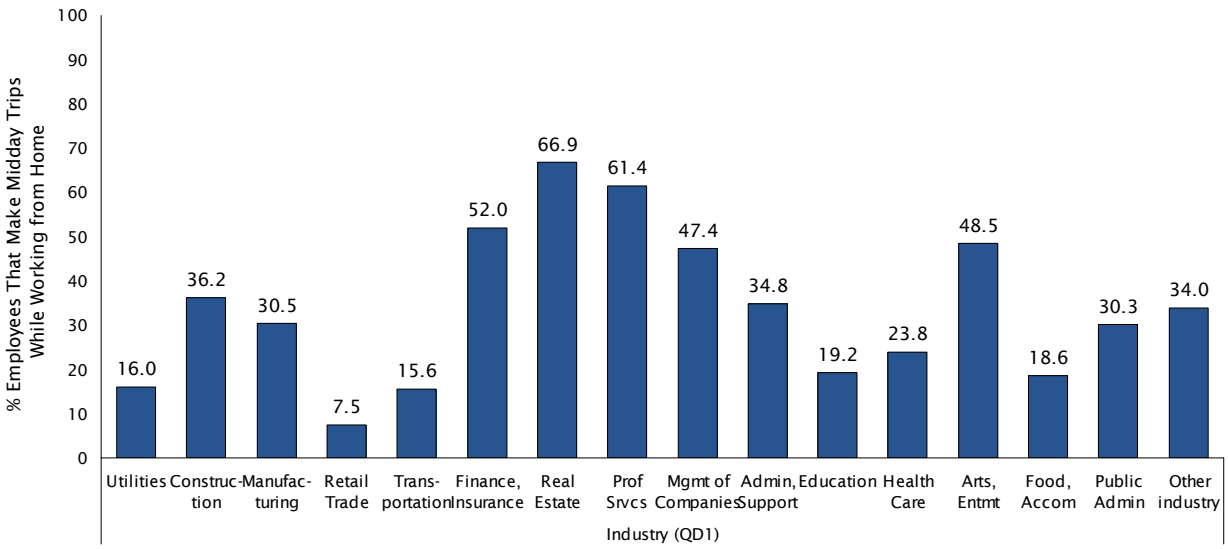


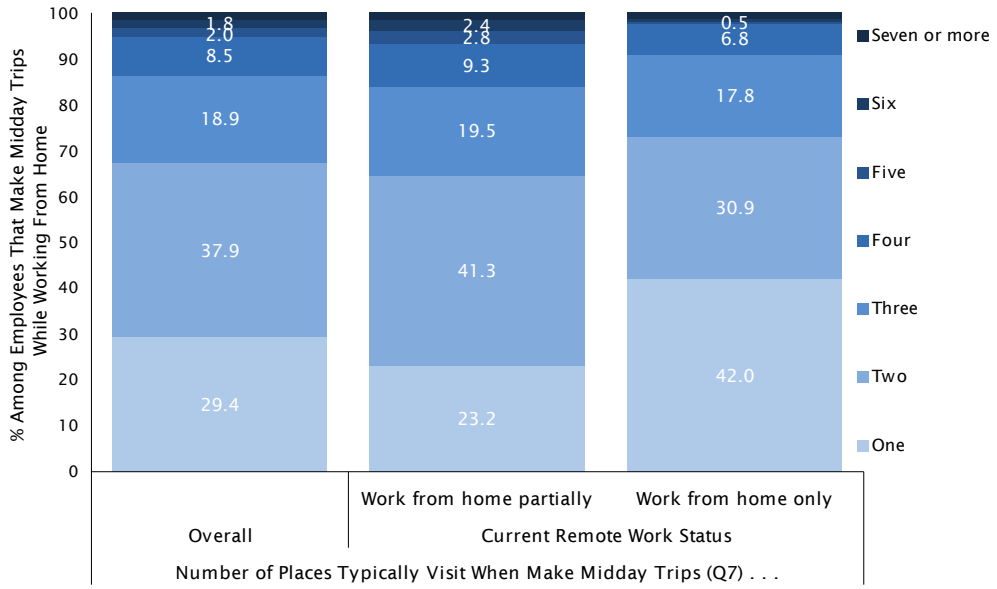
FIGURE 263 MIDDAY TRIPS WHILE WORKING FROM HOME BY INDUSTRY



NUMBER OF MIDDAY TRIPS Respondents who reported that they occasionally take midday trips when working from home were subsequently asked to estimate the number of places they typically visit outside of their home during the day. Among all employees who work from home, two-thirds reported that they visit just one (29%) or two (38%) places, while 19% indicated they typically visit three different places when taking midday trips. An additional 12% of respondents reported visiting at least four places outside of their home in a typical day when they are working from home (see Figure 264). It is also worth noting that employees who work from home on a partial basis were more likely than their counterparts who work exclusively from home to report visiting multiple places midday.

2023 Survey, Question 7 *In a typical day when you are working from home, how many different places do you visit outside of your home during the day? If says vary, ask to estimate.*

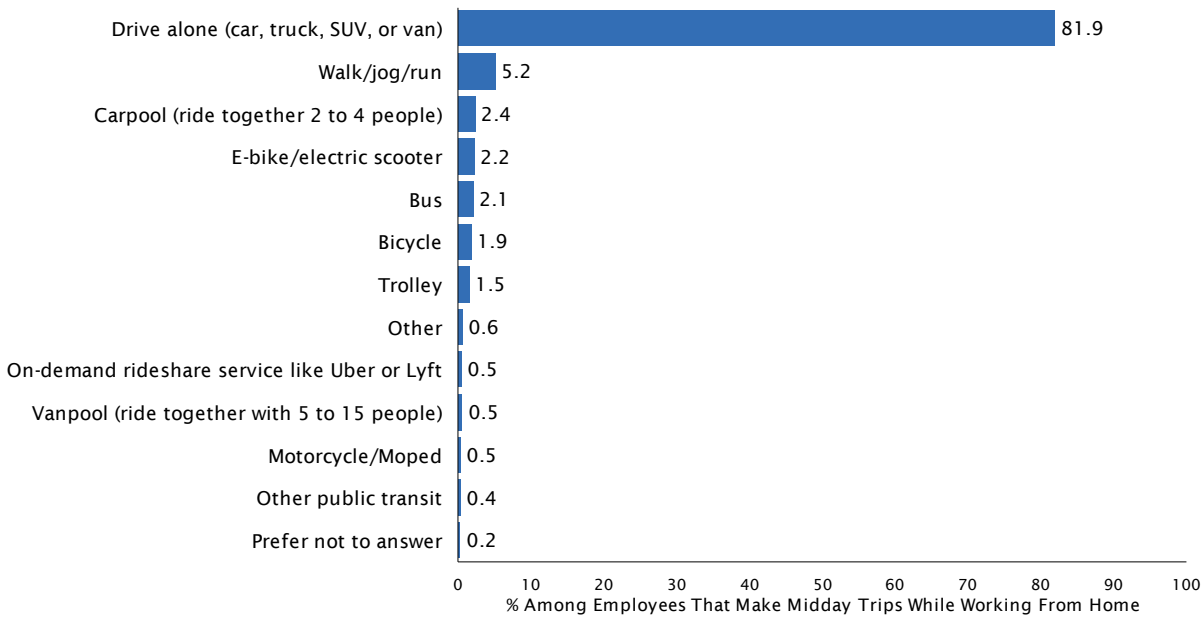
FIGURE 264 NUMBER OF PLACES TYPICALLY VISIT WHEN MAKE MIDDAY TRIPS



MIDDAY TRIP MODE When asked which mode they typically use when taking midday trips, driving alone was the dominant response (82%), followed by walking, jogging, or running (5%), carpooling (2%), E-bike/E-scooter (2%), bus (2%), bicycle (2%), and Trolley (2%).

2023 Survey, Question 8 *When you are working from home, what type of transportation do you typically use when taking midday trips? If says drive, ask: Do you typically drive alone or with others in the vehicle?*

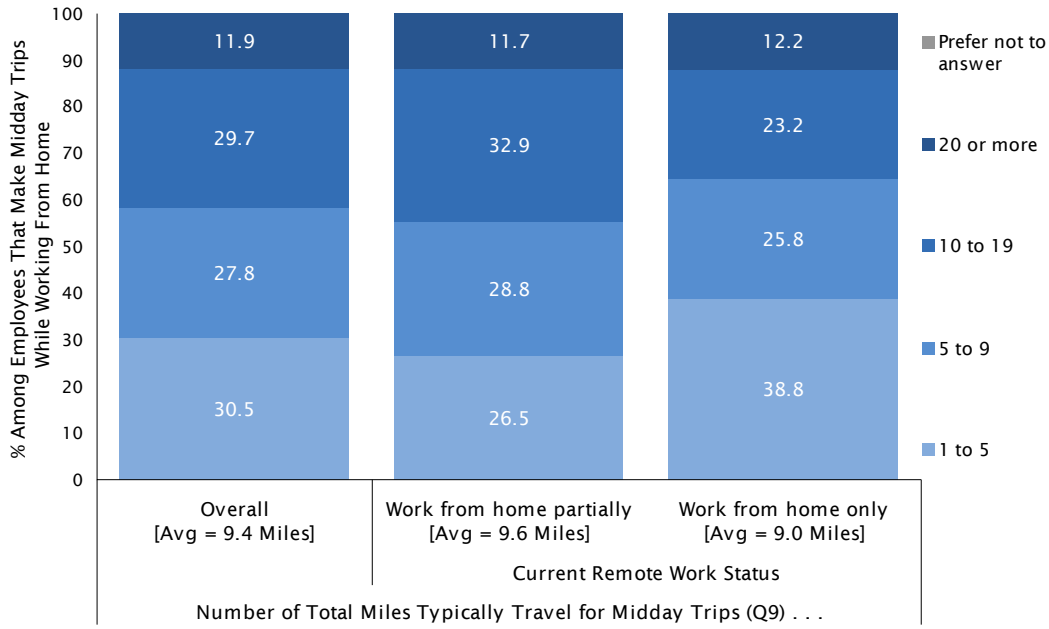
FIGURE 265 TYPE OF TRANSPORTATION USED FOR MIDDAY TRIPS



TOTAL VMT FOR MIDDAY TRIPS Employees who work from home and reported that they occasionally take midday trips were also asked to indicate the total number of miles they travel when making midday trips. Overall, respondents reported an average 9.4 total miles traveled for their midday trips, although the estimated VMT was slightly higher (9.6 miles) among those who work from home on a partial basis when compared to those who work from home exclusively (9.0 miles).

2023 Survey, Question 9 *In a typical day when you work from home, what would you say is the total number of miles you travel when making midday trips?*

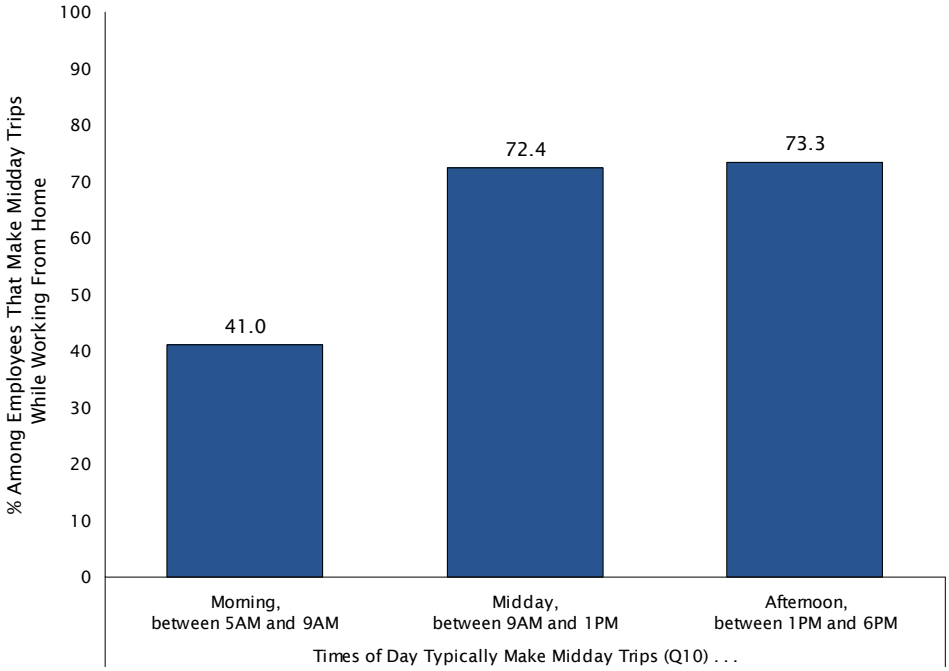
FIGURE 266 TOTAL MILES TRAVELED WHEN MAKE MIDDAY TRIPS



WHAT TIME DO YOU TAKE MIDDAY TRIPS? The final question in this series asked employees who work from home and occasionally take midday trips to describe *when* they typically make trips when working from home. As shown in Figure 267 on the next page, 41% indicated they make early morning trips (5AM to 9AM), while trips between 9AM and 1PM (72%) and between 1PM and 6PM (73%) were more common.

2023 Survey, Question 10 *We're interested in the times of day that you typically make trips when you work from home. Do you typically make trips: _____?*

FIGURE 267 TIMES OF DAY MAKE MIDDAY TRIPS



Employees: Employment and Commute Changes (2023)

One of the unanticipated outcomes of the pandemic was a sharp increase in the number of employees who quit their jobs. Coined by economists as the *Great Resignation*, the Bureau of Labor Statistics reported that the number of employees who left their jobs in November 2021 was the highest ever recorded in the United States, and this followed six months of record-setting rates of resignations beginning in April 2021. By the end of 2021, more than 47 million Americans had left their jobs. Accordingly, it was of interest to ask San Diego County employees whether they had changed employers during the past two years and—if yes—to state the reason for their move. Employees were also asked about changes they may have made to their commute mode due to the pandemic.

CHANGED EMPLOYERS DURING PAST 2 YEARS

Among currently employed San Diego County residents in 2023, approximately one-quarter (26%) indicated they had changed employers during the two years prior to the interview (Figure 268). The tendency to have changed employers during this period increased as household income decreased, and was most common among those under 25 years of age, females, those who completed the interview in Spanish, African Americans, and those working in retail trade (see figures 269-272).

2023 Survey, Question 14 *Did you change employers during the past two years?*

Figure 268 Changed Employers in Past 2 Years

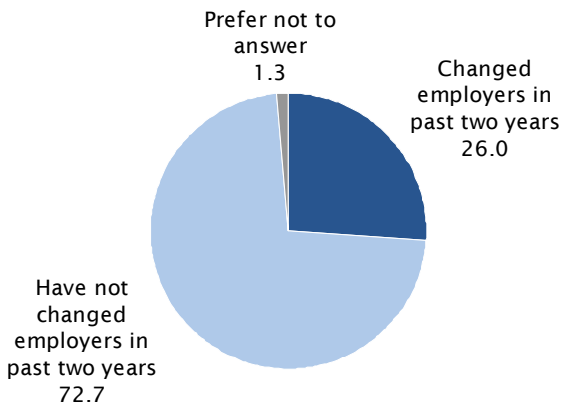


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FIGURE 269 CHANGED EMPLOYERS IN PAST 2 YEARS BY AGE, GENDER, INDEPENDENT CONTRACTOR & SURVEY LANGUAGE

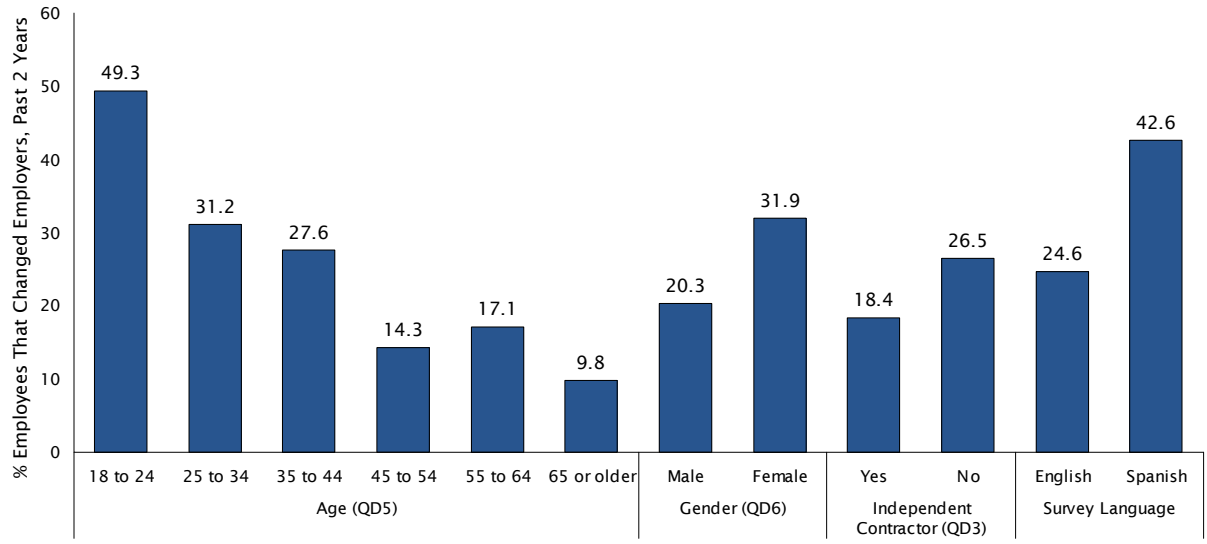


FIGURE 270 CHANGED EMPLOYERS IN PAST 2 YEARS BY ETHNICITY & HOUSEHOLD INCOME

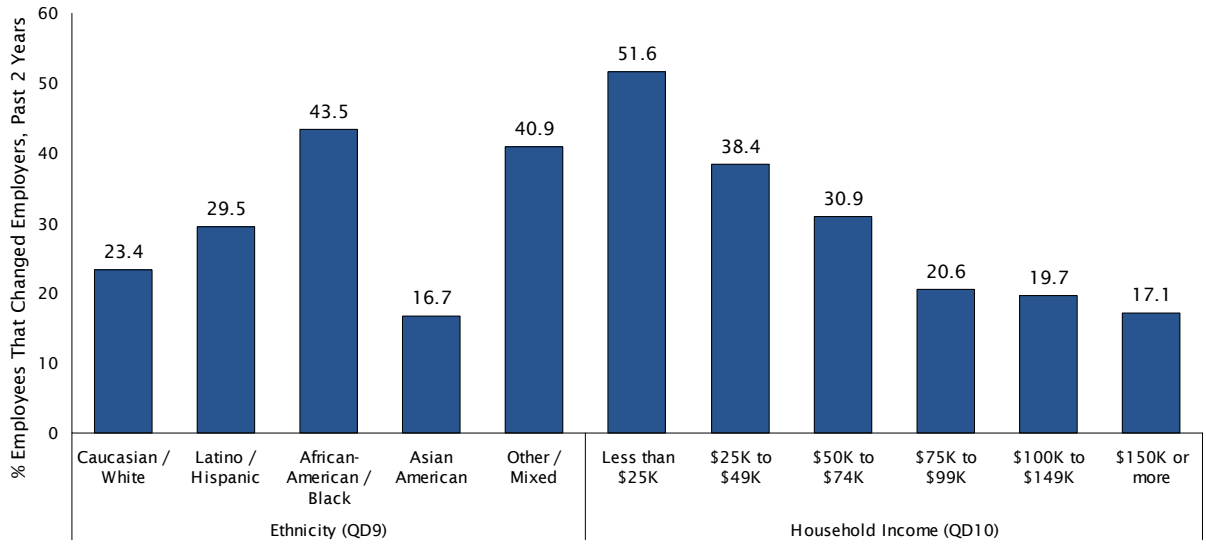


FIGURE 271 CHANGED EMPLOYERS IN PAST 2 YEARS BY SAN DIEGO COUNTY SUBREGION & NUMBER OF EMPLOYEES AT COMPANY

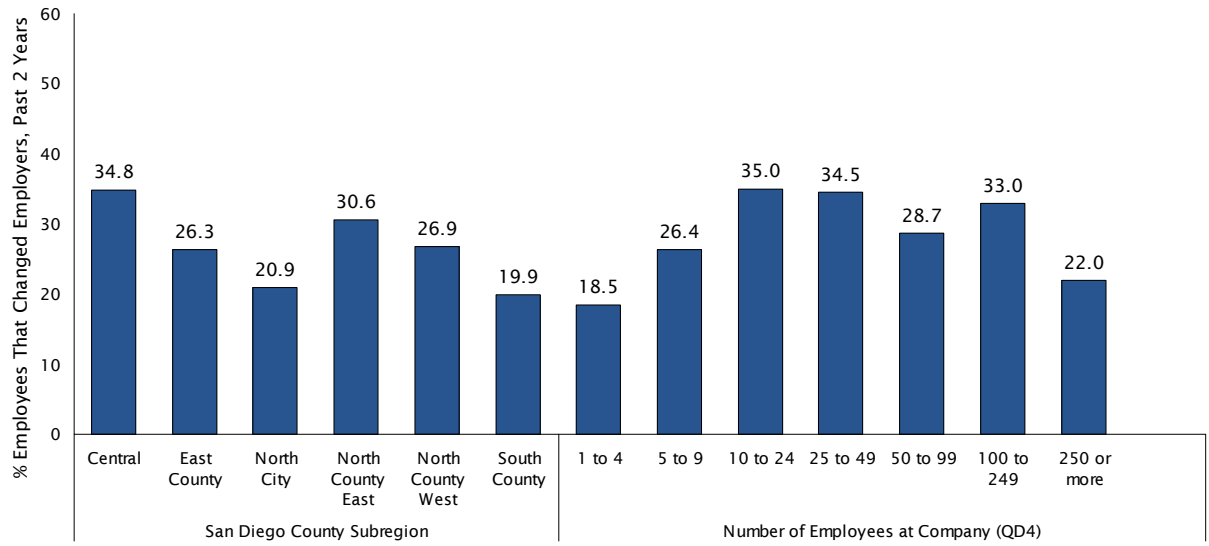
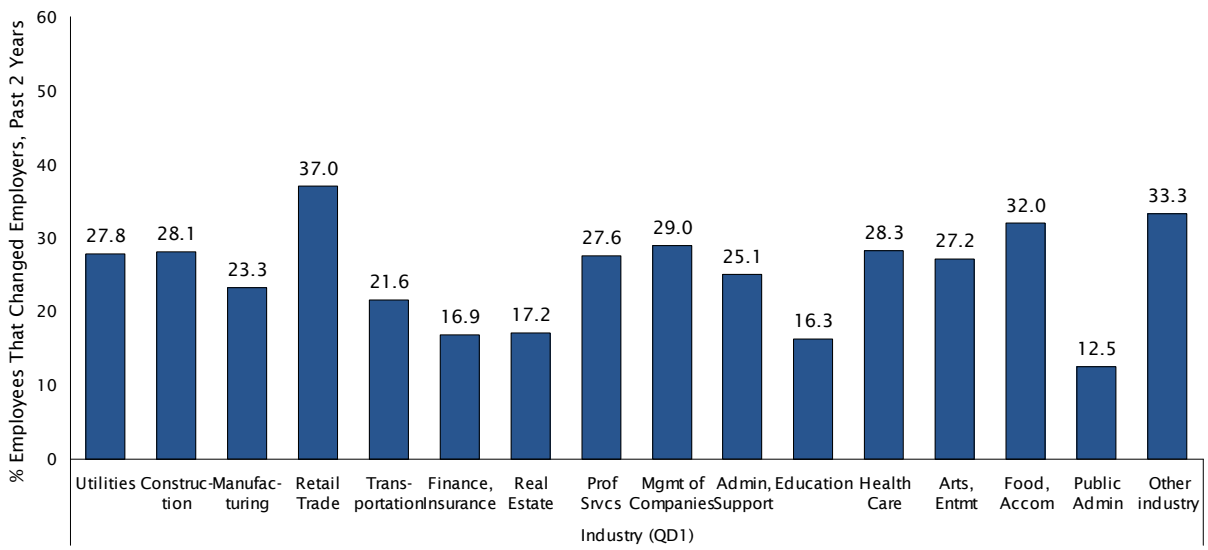


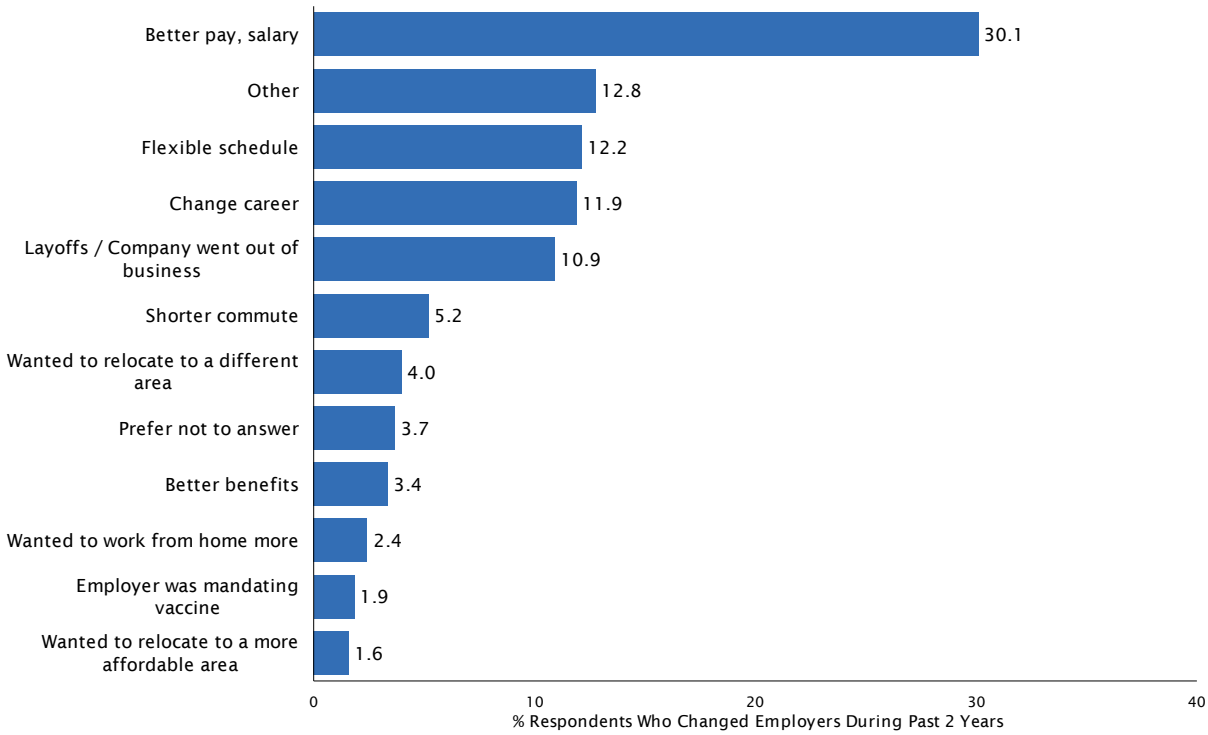
FIGURE 272 CHANGED EMPLOYERS IN PAST 2 YEARS BY INDUSTRY



Those who had changed employers in the past two years were subsequently asked in an open-ended manner to describe the *main* reason for the change (see Figure 273). A desire for better pay/salary was the most common response (30%), followed by a collection of other specific reasons (13%), wanting a flexible schedule (12%), a change in career (12%), and layoffs/company when out of business (11%). It is also worth noting that just 2% mentioned they changed employers because their prior employer mandated the COVID-19 vaccine.

2023 Survey, Question 15 *What was the main reason why you changed employers?*

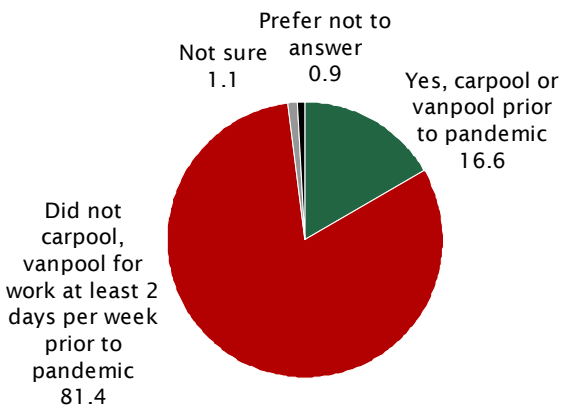
FIGURE 273 MAIN REASON CHANGED EMPLOYERS



DID YOU RIDESHARE FOR YOUR COMMUTE PRIOR TO PANDEMIC? In 2023, employees were asked to think back to their pre-pandemic work commute and indicate whether they carpooled or vanpooled to work at least two days per week. Overall, 17% of employees indicated they did so, with the remainder indicating they didn't carpool or vanpool to work at least two days per week during this period (81%), were unsure (1%), or unwilling to answer the question (1%).

2023 Survey, Question 16 *Prior to the pandemic, did you carpool or vanpool for your work commute at least two days per week?*

FIGURE 274 CARPOOL OR VANPOOL BEFORE PANDEMIC



For the interested reader, figures 275-277 show how the percentage of employees who carpooled or vanpooled to work at least two days per week prior to the pandemic varied by age, gender, independent contractor status, language, ethnicity, household income, subregion, current access to a personal vehicle, and their primary commute mode at the time of the 2023 survey.

FIGURE 275 CARPOOL OR VANPOOL BEFORE PANDEMIC BY AGE, GENDER, INDEPENDENT CONTRACTOR & SURVEY LANGUAGE

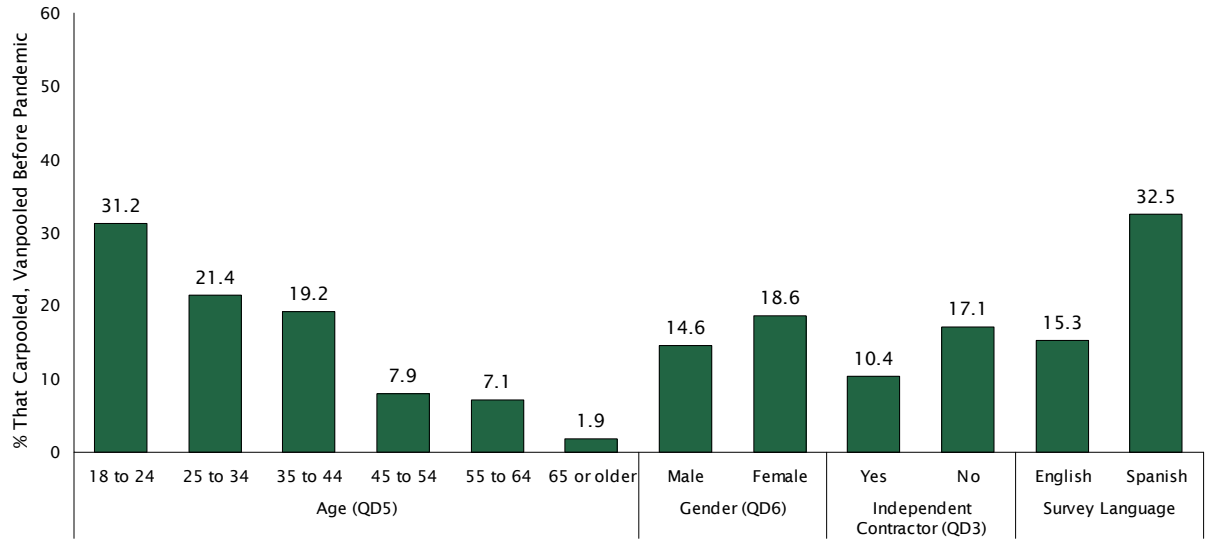


FIGURE 276 CARPOOL OR VANPOOL BEFORE PANDEMIC BY ETHNICITY & HOUSEHOLD INCOME

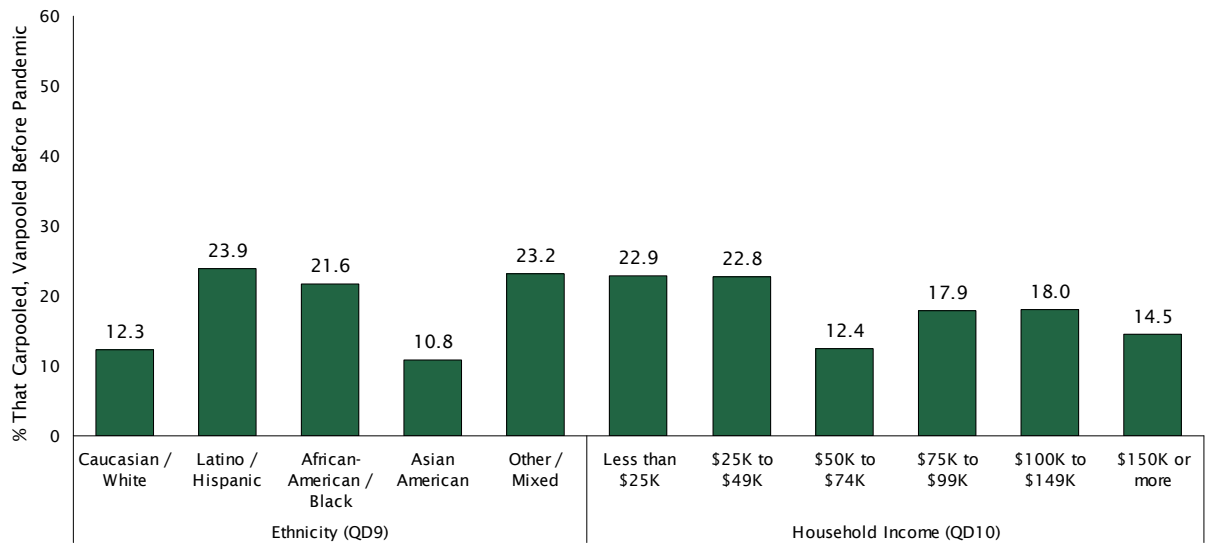


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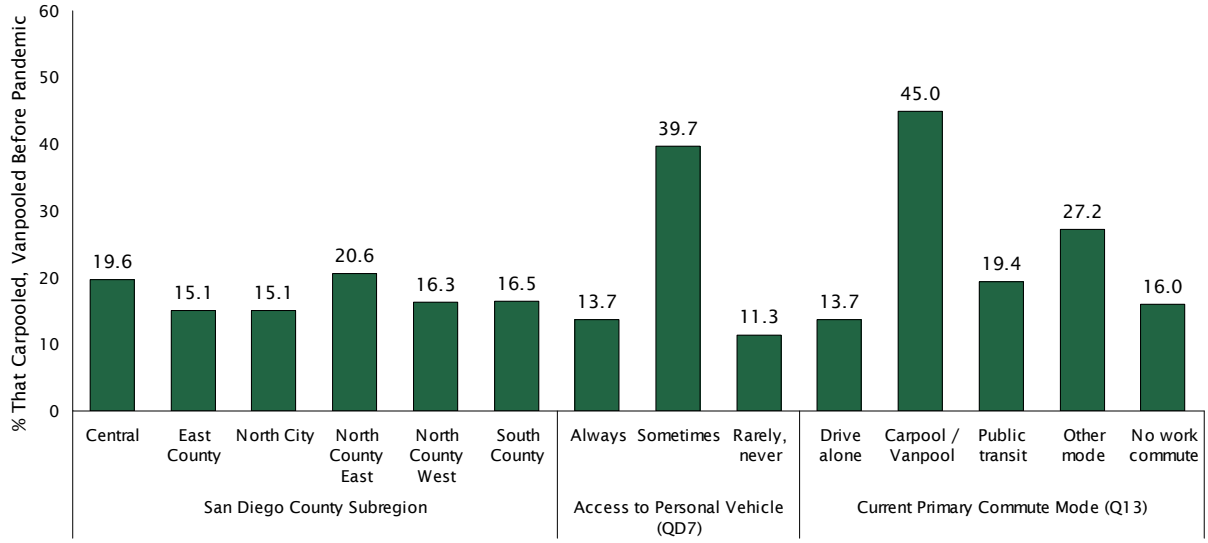
FIGURE 277 CARPOOL OR VANPOOL BEFORE PANDEMIC BY SAN DIEGO COUNTY SUBREGION, ACCESS TO PERSONAL VEHICLE & CURRENT PRIMARY COMMUTE MODE

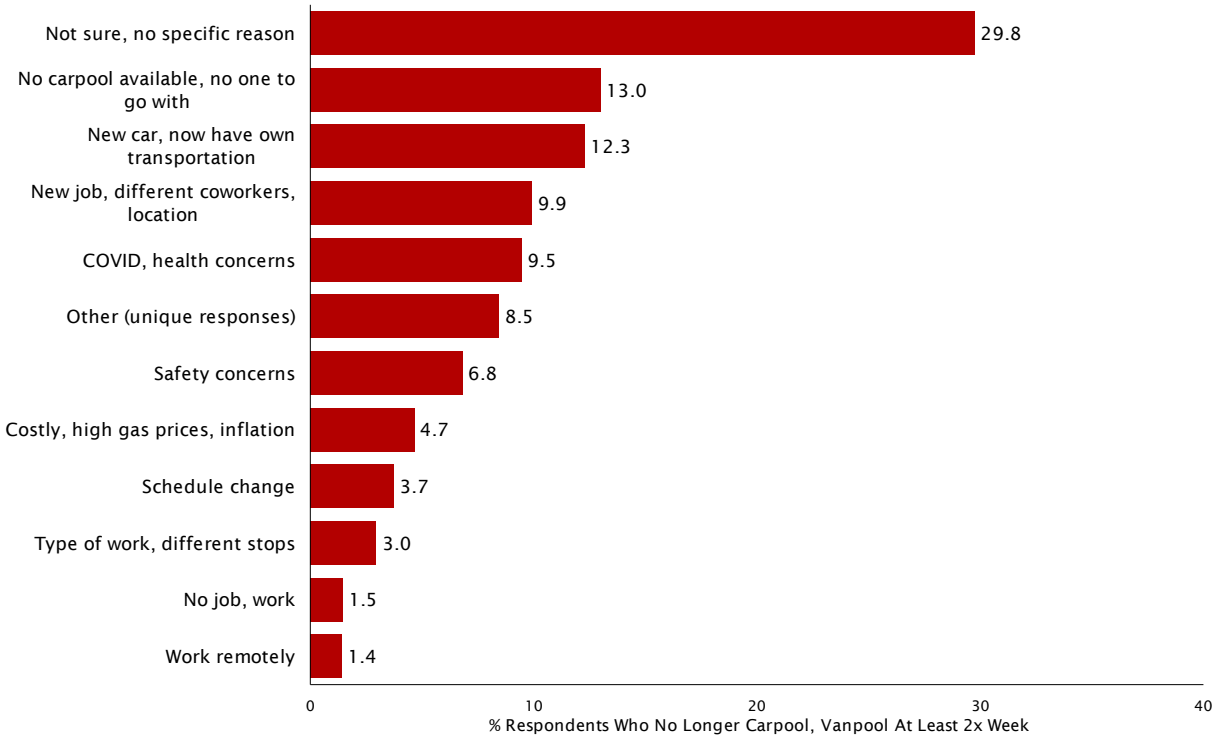


Employees who indicated they carpooled or vanpooled to work pre-pandemic but don't currently do so were subsequently asked to describe the reason they stopped carpooling or vanpooling for their work commute. Question 17 was presented in an open-ended manner to allow respondents to mention any reason that came to mind without being prompted by or constrained to a particular list of options. True North later reviewed the verbatim responses and grouped them into the categories shown in Figure 278 on the next page.

Approximately 30% of respondents did not offer a specific reason for why they no longer carpool or vanpool to work, while others mentioned they have no one to carpool with (13%), they now have their own transportation/new car (12%), their job, location, or coworkers changed (10%), or concerns about COVID-19/health (10%).

2023 Survey, Question 17 *Is there a specific reason why you stopped carpooling or vanpooling for your work commute? If yes, ask: Please describe the reason.*

FIGURE 278 REASON NO LONGER CARPOOL OR VANPOOL



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EMPLOYEES: REMOTE WORK EXPERIENCES (2023)

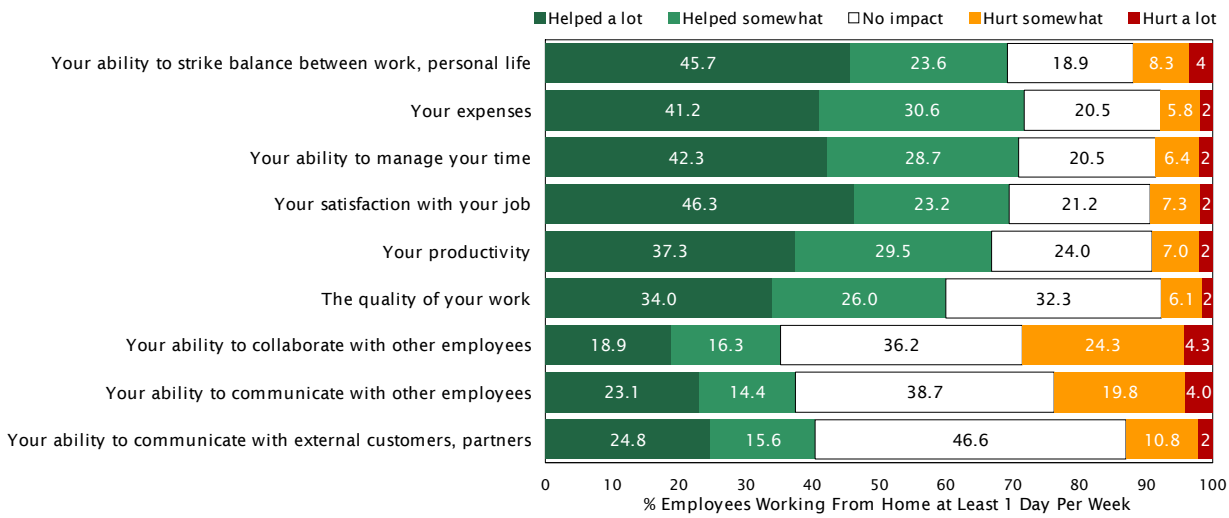
Similar to the question series asked one year into the pandemic (2021), the 2023 tracking survey asked employees who currently work at home at least one day per week to describe how remote work has impacted various aspects of their job performance, their ability to collaborate with other employees, as well as their personal life and living arrangements.

REMOTE WORK IMPACTS The first question in this series presented respondents with each item shown on the left of Figure 279 and simply 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).

In 2023, employees reported that working from home has the most impact on their ability to strike a balance between work and their personal life, their expenses, their ability to manage their time, and their job satisfaction, with approximately eight in ten employees reporting either a positive or negative impact for each dimension. At least two-thirds of employees also reported that working from home has an impact on their productivity and their quality of work, while six in ten respondents perceived impacts to their ability to collaborate with other employees and their ability to communicate with other employees. Of the dimensions tested, employees were least likely to indicate that working from home has impacted their ability to communicate with external customers or partners.

2023 Survey, Question 18 *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 279 IMPACT OF WORKING FROM HOME POST-PANDEMIC (2023)



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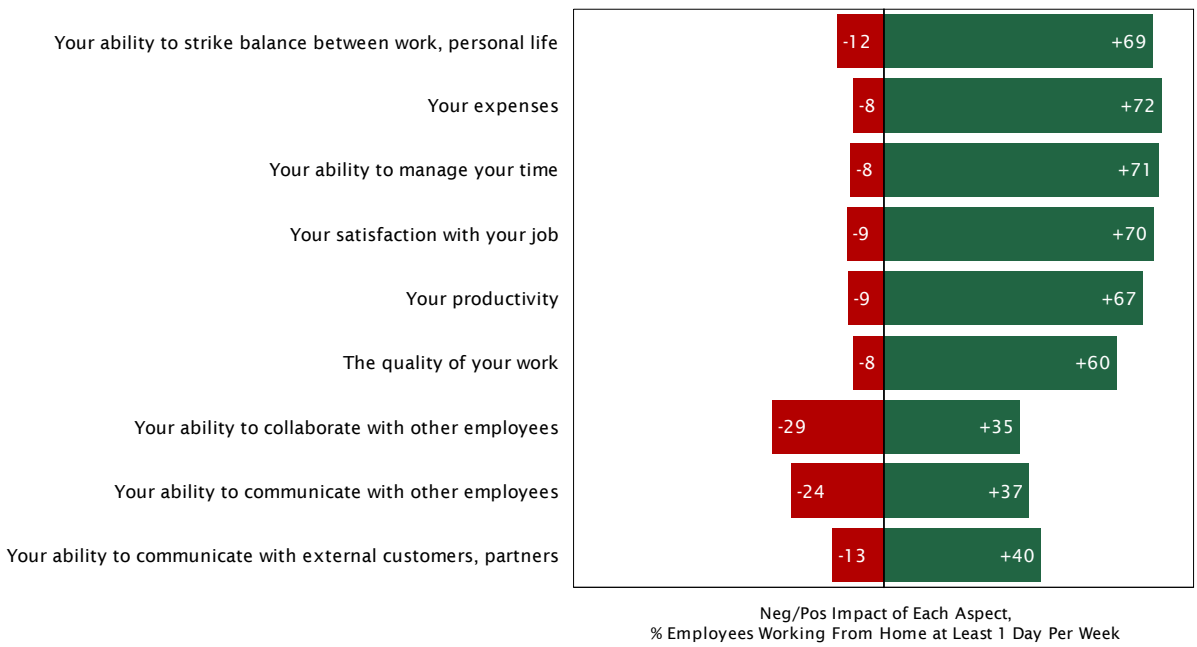
For every dimension tested, some employees felt that remote work arrangements helped, while others perceived they hurt. Figure 280 displays the findings of Question 14 in a format that makes it easier to identify dimensions for which the *net* impact across all employees was generally negative or positive. Unlike during the pandemic when employees were somewhat mixed in their assessments of remote work's impacts (some net positive impacts, some net negative impacts), in 2023 employees indicated that working remotely has a net positive impact on every dimension tested. The largest net positive impacts (helpful % - hurtful %) were found with respect remote work's impacts on their expenses (64%), ability to manage their time (63%), their job satisfaction (61%), their productivity (58%), and their ability to strike a balance between work and personal life (57%).

FIGURE 280 NEGATIVE/POSITIVE IMPACTS OF EACH ASPECT POST-PANDEMIC (2023)



CHANGES DUE TO WORKING FROM HOME

Employees who reported working from home at least one day per week in the post-pandemic period (2023) were asked to describe the types of changes they may have made to accommodate the arrangement. As shown in Figure 281 on the next page, nearly three-quarters of employees indicated they had created dedicated space in their home for an office or work space (72%), while more than four-in-ten employees had changed the hours of the day they work (49%) and increased the number of hours they work (45%). Overall, less than one-third of employees reported in 2023 that they experience problems because of poor Internet access at their home (32%), moved to a new house or have plans to do so in response to working from home (22%), or reduced the number of vehicles their household owns (17%). Figure 282 shows how the percentage of employees that made changes in response to working from home varied according to their post-pandemic remote work arrangements. Those who work exclusively from home were the most likely to have created a dedicated work space in their home, while those who work from home occasionally were most apt to report changing the times of day that they work in response to working from home.

2023 Survey, Question 19 *Because you are working from home, have you: _____?*

FIGURE 281 CHANGES MADE POST-PANDEMIC (2023) DUE TO WORKING FROM HOME

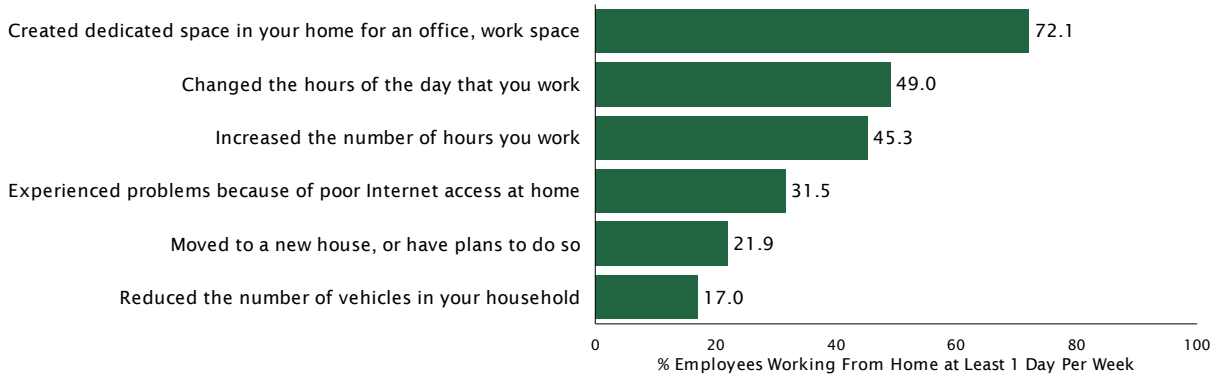
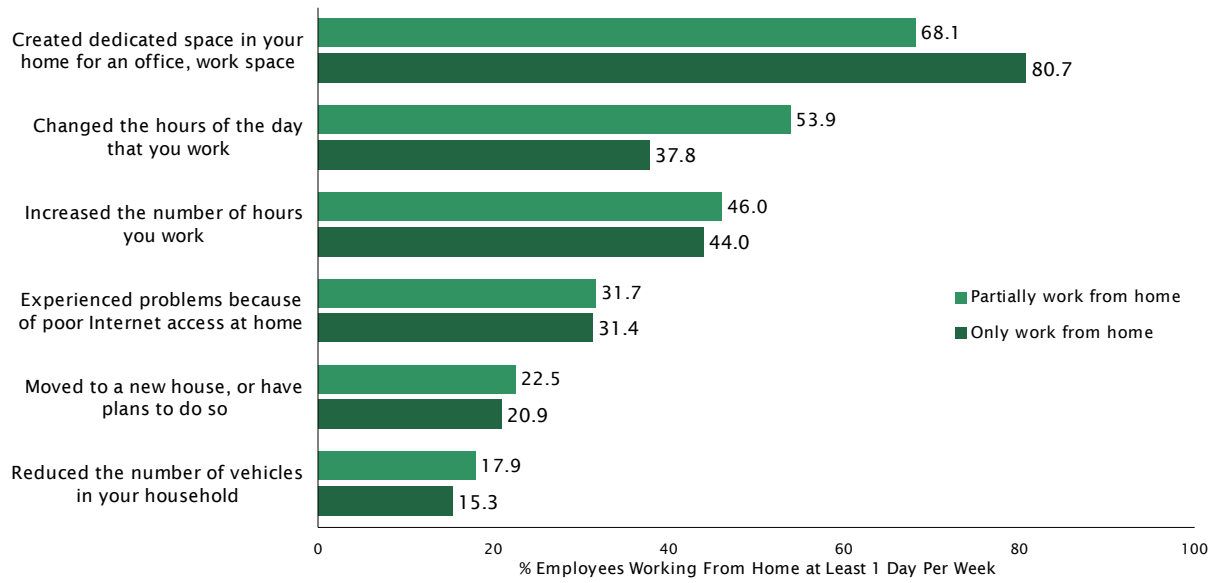


FIGURE 282 CHANGES MADE POST-PANDEMIC (2023) DUE TO WORKING FROM HOME BY REMOTE WORK STATUS



MOVING TO A NEW HOME The final question in this series (Question 20) was reserved for employees who indicated they had moved their home in response to working from home (or had plans to do so). When asked about the proximity of their new home in relation to their employer's main location, the 2023 tracking survey results do not reveal a net migration to distances further away from employers' locations. Figure 283 on the next page puts the results of Question 20 into the context of *all* employees and shows that the 22% of employees that reported moving to accommodate their remote work arrangements were fairly evenly split among those who moved closer to their employer's location (6%), those who moved further away (7%), and those who moved to a location about the same distance away as their prior home (8%). The tendency to move further away from one's employer did not bear a consistent relationship to household income, but was somewhat higher among those residing in the North County East subregion (see Figure 284).

As with the results of this question when asked during the pandemic, it should be noted that since employees were sampled from those living in the San Diego region for the tracking survey, employees who moved out of the region are not represented in the sample unless they kept their same phone number and/or email. Thus, these figures likely underestimate the net migration away from employers' locations that occurred during and post-pandemic.

2023 Survey, Question 20 *You indicated that you moved your home or have plans to do so. Is your new home closer to your employer's main location, about the same distance, or is it further away?*

FIGURE 283 NEW HOME LOCATION POST-PANDEMIC (2023)

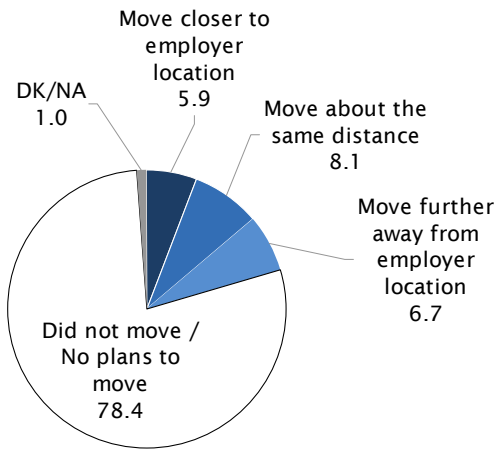
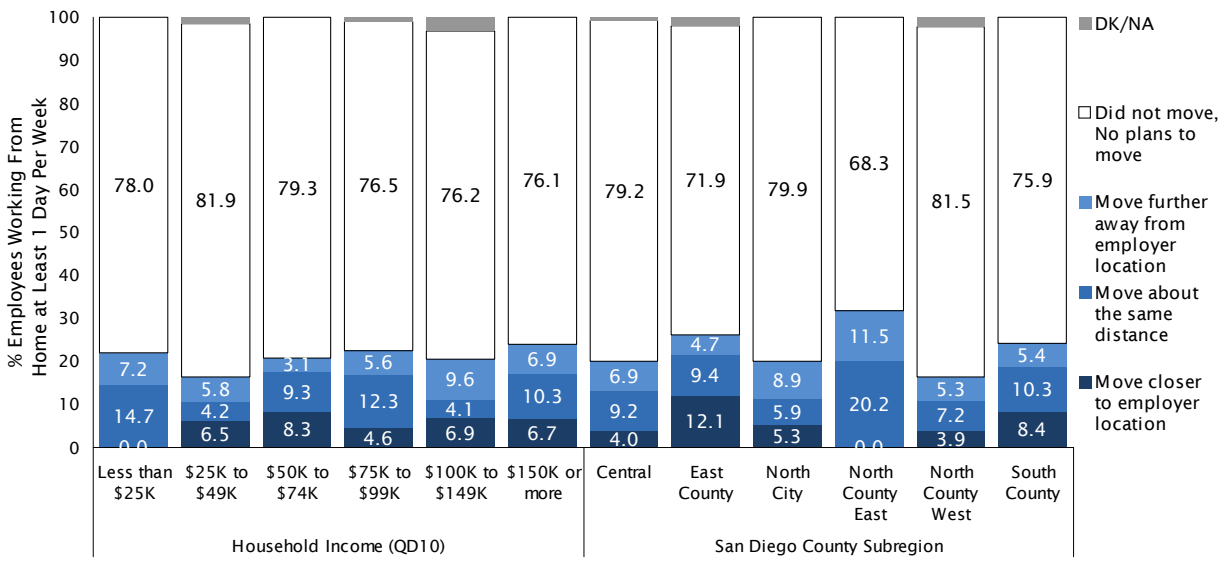


FIGURE 284 NEW HOME LOCATION POST-PANDEMIC (2023) BY HOUSEHOLD INCOME & SAN DIEGO COUNTY SUBREGION



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Employees: Travel & Activities (2023)

Although much of the 2023 tracking survey of employees focused on employment and work arrangements, the survey also addressed other aspects of daily life that can shape how, where, and when people travel in the San Diego region.

CHANGE IN TRAVEL & ACTIVITIES

For each of the activities shown on the left of Figure 285, employees were asked whether they currently engage in this activity more often, less often, or at about the same frequency as they did one year ago. The most common answer in *most* cases was that their 2023 engagement in the activities is about the same as one year prior. Moreover, to the extent that employees reported a change in their activities during this period, for most activities tested the balance of those who reported engaging in the activity more often was largely offset by those who reported doing so less often.

2023 Survey, Question 22 *When compared to one year ago, are you _____ more often, about the same, or less often? Get answer, then ask: Would that be much (more/less) often or somewhat (more/less) often?*

Figure 285 Frequency of Activities Compared to One Year Ago

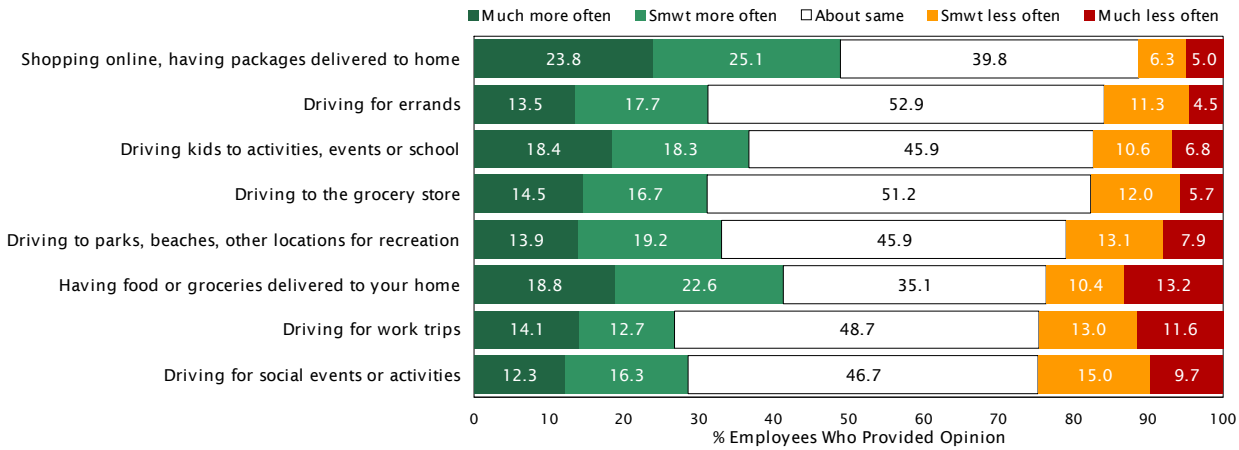
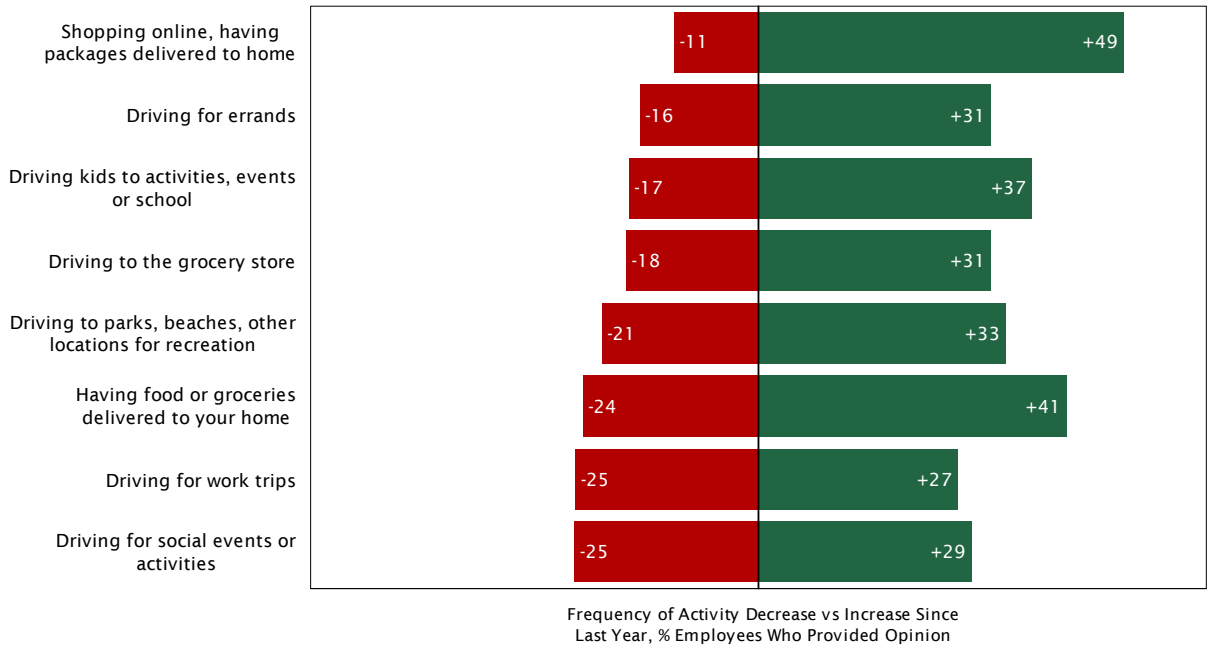


Figure 286 on the next presents a simplified view of the data that makes it easier to identify those activities with the largest net increases or decreases in frequency in the post-pandemic period when compared to one year prior. The largest net increases in the percentage engaging in the activity occurred for shopping online and having packages delivered to their home (net +38%), driving kids to school or activities (+20%), and having food or groceries delivered to their home (+17%). The post-pandemic patterns shown in Figure 286 are much different than those recorded during the pandemic (see Figure 215 on page 125), when employees reported net decreases for most activities.

FIGURE 286 DECREASE VS INCREASE OF ACTIVITIES COMPARED TO ONE YEAR AGO



EMPLOYEES: 2024 EXPECTATIONS

Having profiled employees' post-pandemic work arrangements and various aspects of their professional and private lives, the 2023 tracking survey next asked respondents to relay what they anticipate their work arrangements and commute status will be in the future, one year from now. Will they have the opportunity to work remotely in 2024? Do they expect they will work from home? And how do their anticipated 2024 work arrangements align with their personal preferences? Although employees' expectations are not necessarily prescient, they can provide some insight into whether the patterns of remote work witnessed in 2023 represent a reasonably stable, new normal.

WORK DAYS & REMOTE WORK PATTERNS

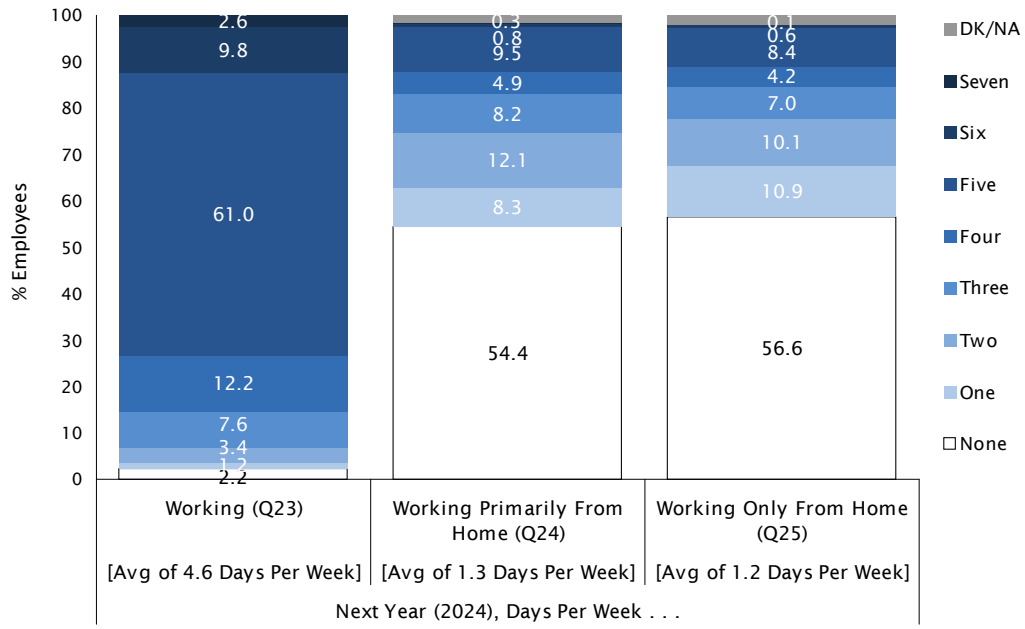
Looking ahead to 2024, 61% of employees anticipated they would work five days per week, and an additional 12% expected to work six or seven days per week (Figure 287). When compared to the current period (2023), the average number of days employees expected to work in 2024 (4.6 days per week) was slightly lower than the 2023 figure (4.8).

2023 Survey, Question 23 *Next, let me ask you about the future, one year from now. If you aren't sure about an answer, please give me your best estimate. One year from now, how many days per week do you expect to work?*

2023 Survey, Question 24 *Of the <insert from Q23> work days per week, how many of these days do you expect to primarily work from home one year from now.*

2023 Survey, Question 25 *Of the <insert from Q24> days you will primarily work from home, how many days do you expect to work from home the entire day and not commute to a separate work site?*

FIGURE 287 DAYS EXPECT TO WORK NEXT YEAR



With respect to *where* they will be working, 44% of employees indicated that one year from now they expect to work from home at least one day per week, which is higher than the percentage found currently in 2023 (39%). The average number of days employees expect to work from home one year from now (1.3) is the same as the figure found currently (2023). Similarly, excluding split days, the average number of days employees expect to work from home in 2024 (1.2 days per week) is nearly identical to 2023 figure (1.1 days). In short and in the aggregate, employees' expectations for 2024 are that the decline in remote work arrangements experienced between the height of the pandemic (2021) and 2023 will abate, and remote work will be slightly more common a year from now than it is today. It is also worth noting that employees' expectations for remote work patterns in 2024 are nearly identical to their expectations when asked in 2021 about their post-pandemic work status (see Figure 216 on page 126). Figures 288-291 show how the average number of work days and days working from home anticipated for 2024 varied across employee subgroups.

FIGURE 288 DAYS EXPECT TO WORK NEXT YEAR BY AGE, GENDER, INDEPENDENT CONTRACTOR & SURVEY LANGUAGE

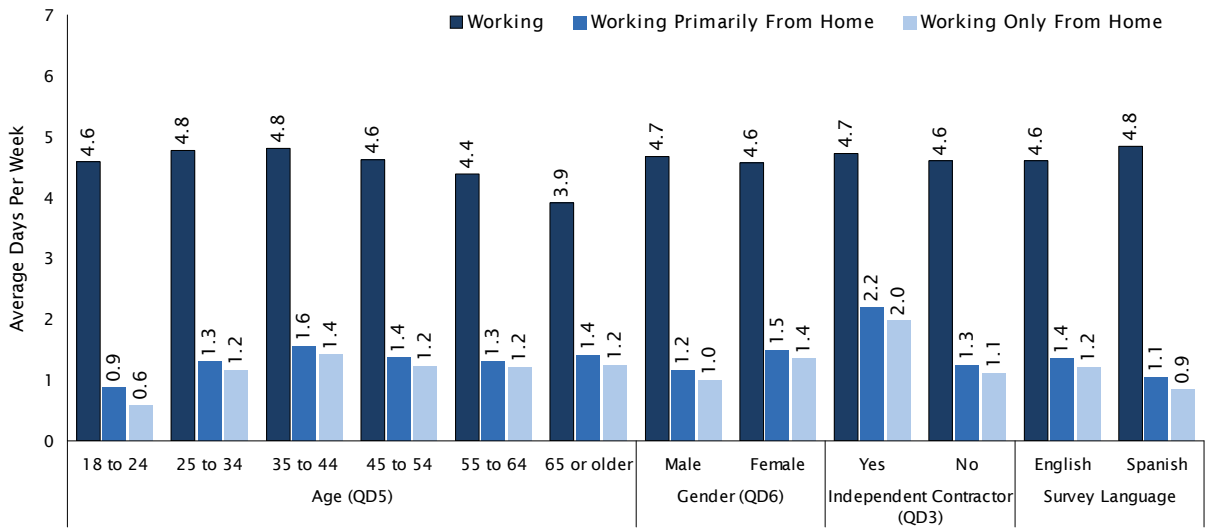


FIGURE 289 DAYS EXPECT TO WORK NEXT YEAR BY ETHNICITY & HOUSEHOLD INCOME

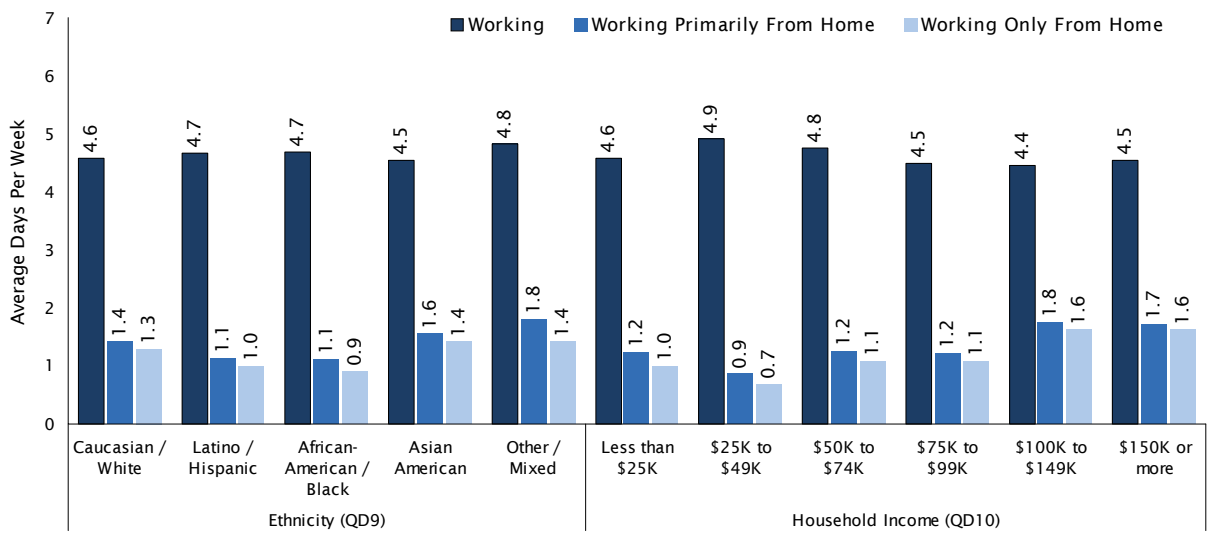


FIGURE 290 DAYS EXPECT TO WORK NEXT YEAR BY SAN DIEGO COUNTY SUBREGION & NUMBER OF EMPLOYEES AT COMPANY

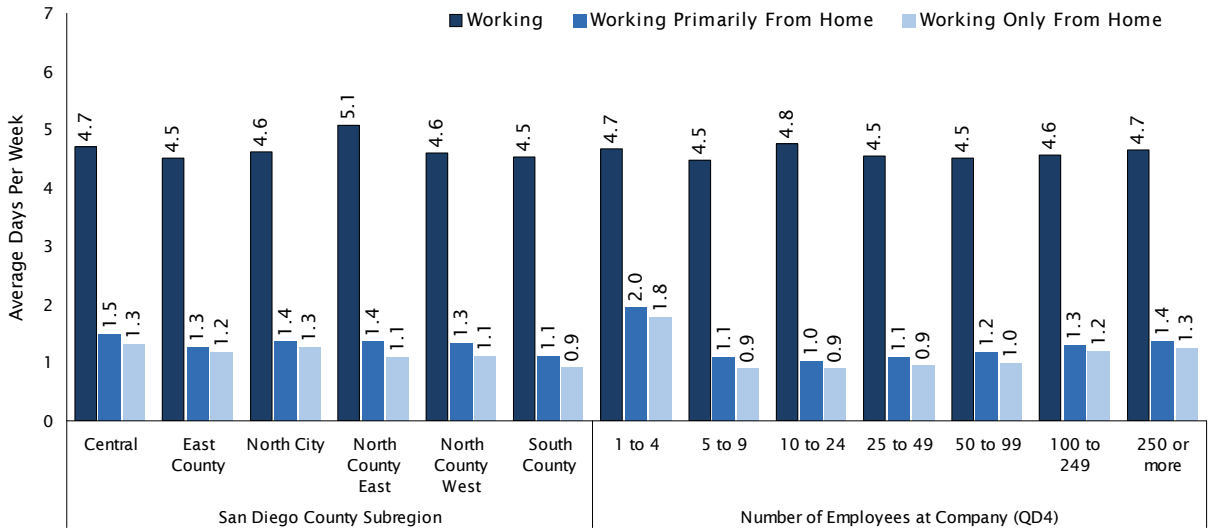


FIGURE 291 DAYS EXPECT TO WORK NEXT YEAR BY INDUSTRY

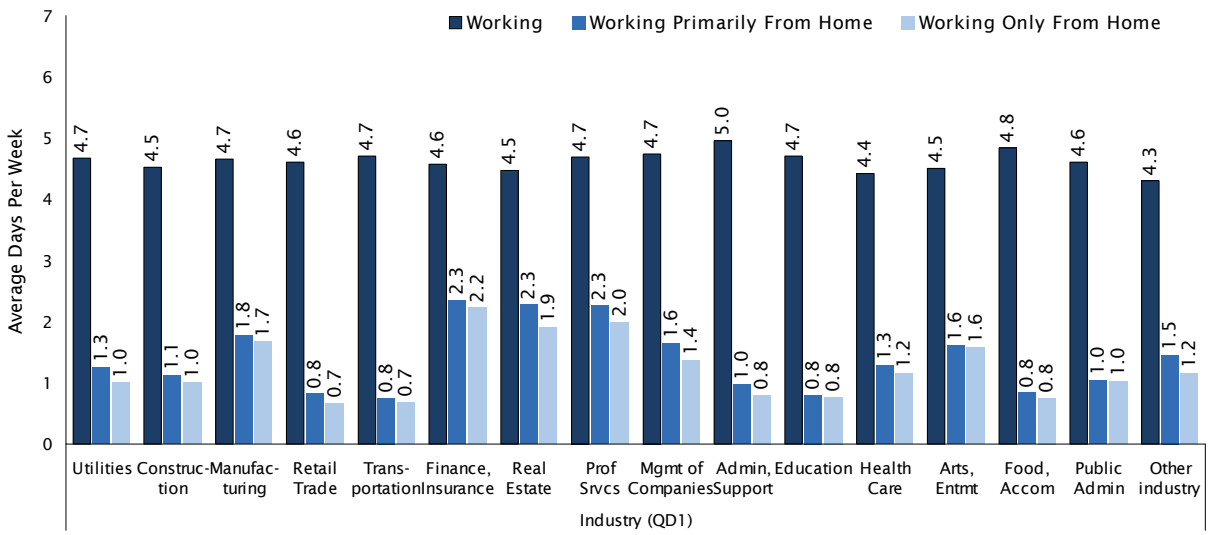
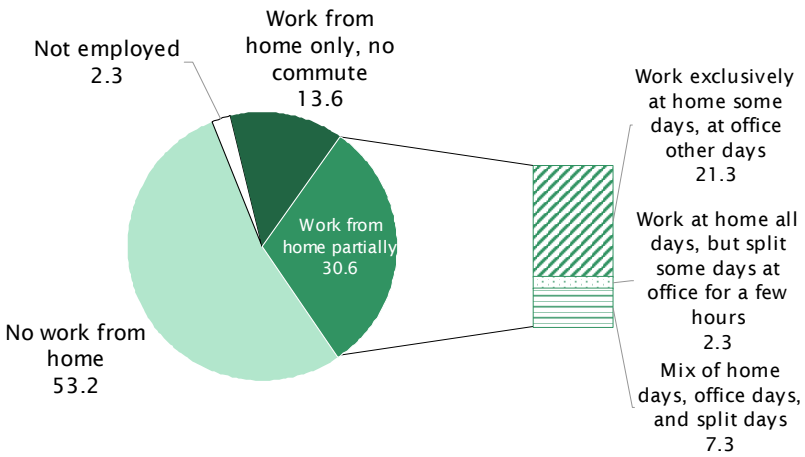


Figure 292 on the next page summarizes employees' expected work patterns one year from now, documenting the percentage of employees who fit into specific work arrangement categories. One year from now in 2024, 53% of employees indicated they expect to work exclusively *away* from their home. Approximately 14% anticipated working exclusively from their home in 2024. Most employees who anticipated working from home in 2024 expected to do so according to a hybrid model, either working exclusively at home some days and exclusively at the office other days (21%), working from home all days with a few split days at the office (2%), or having a mix of home days, office days, and split days (7%). The categorical breakdown of anticipated 2024 work arrangements presented in Figure 292 shows an increase in the percentage of employees engaging in remote work when compared to 2023, with most of this increase occurring among those working from home according to a hybrid model (see Figure 240 on page 141 for 2023 comparison).

FIGURE 292 REMOTE WORK NEXT YEAR



Figures 293-296 show how various subgroups of employees expected to be distributed among the main work arrangement categories in 2024. Although the percentages are different than found in the current period to a degree, the tendency (in practice and expectations) for remote work to occur more often among independent contractors, high-earning households, and those in certain industries (finance and insurance, real estate, professional services, management) remains consistent.

FIGURE 293 REMOTE WORK NEXT YEAR BY AGE, GENDER, INDEPENDENT CONTRACTOR & SURVEY LANGUAGE

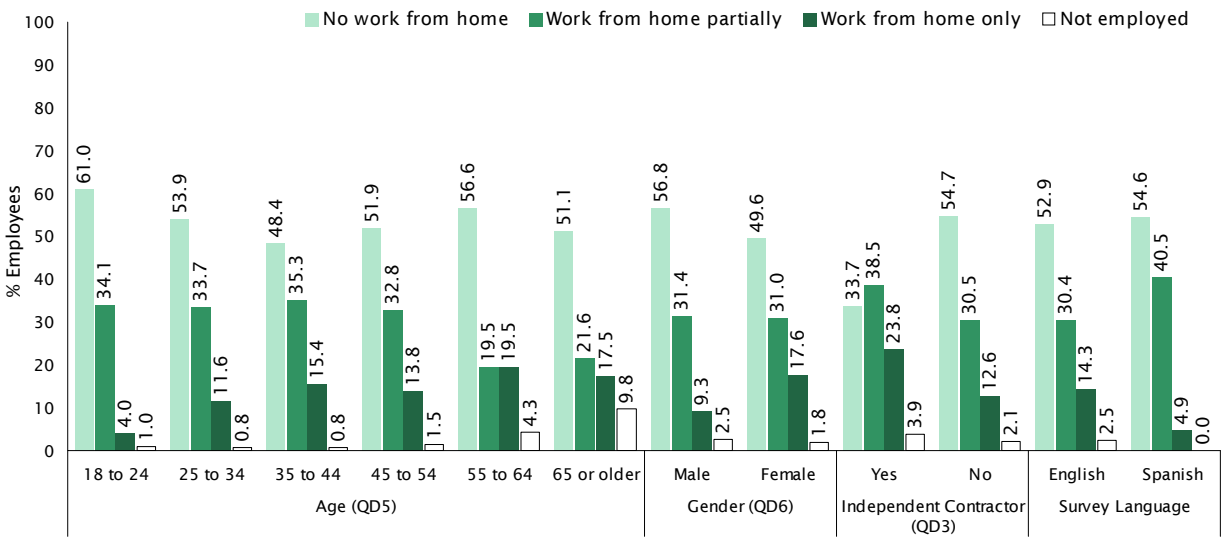


FIGURE 294 REMOTE WORK NEXT YEAR BY ETHNICITY & HOUSEHOLD INCOME

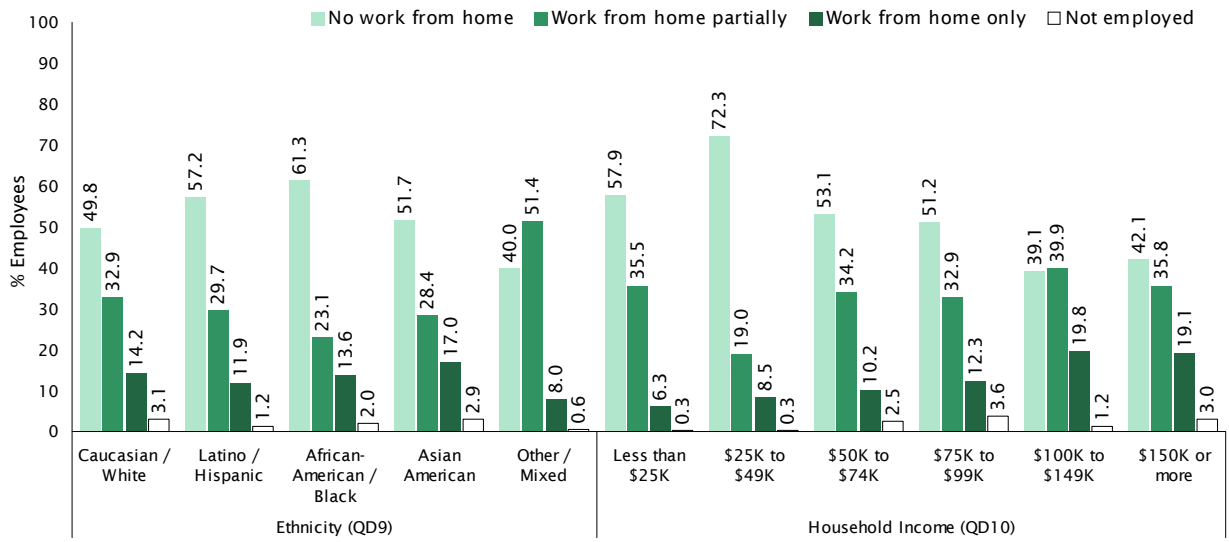


FIGURE 295 REMOTE WORK NEXT YEAR BY SAN DIEGO COUNTY SUBREGION & NUMBER OF EMPLOYEES AT COMPANY

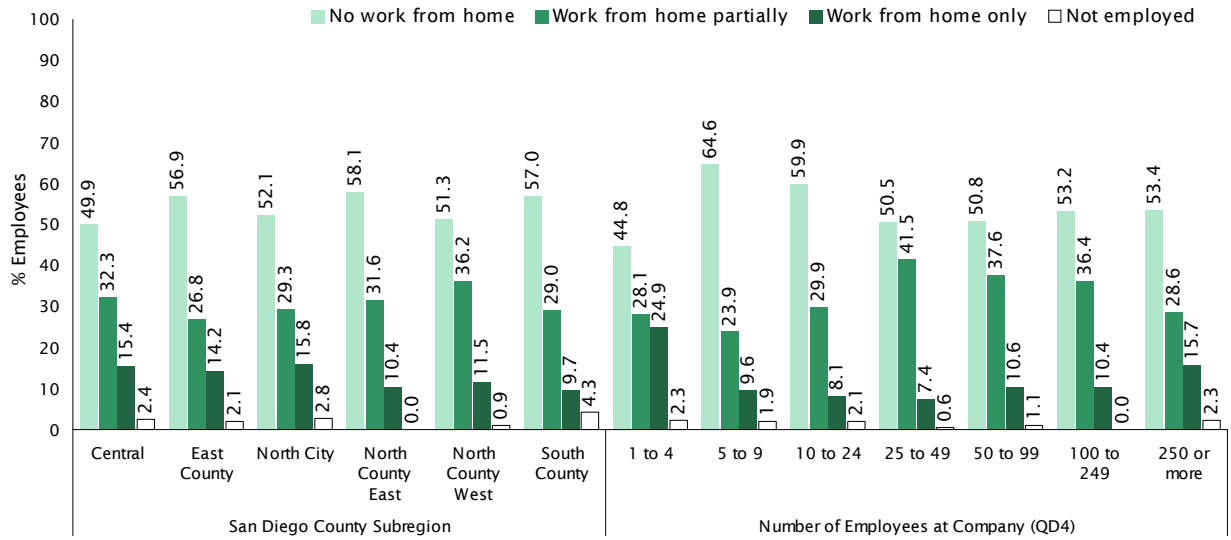


FIGURE 296 REMOTE WORK NEXT YEAR BY INDUSTRY

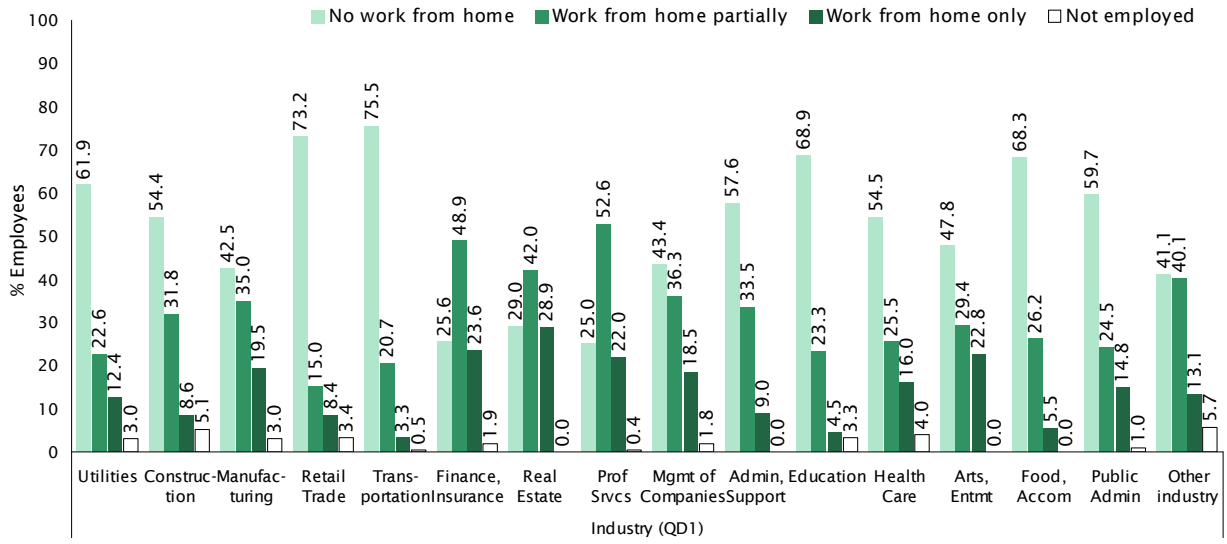
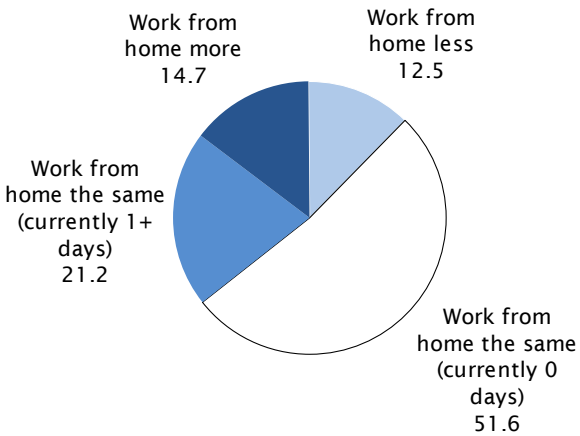


Figure 297 compares work arrangements in 2023 to 2024 expectations at the *individual* level. Approximately 52% of employees indicated that they currently do not work remotely, nor do they expect to work remotely in 2024. The remaining employees are divided between those who currently work remotely at least one day per week and expected to work from home less often (13%) or the same amount (21%) in 2024, while 15% of all employees stated they expected to work from home more often in 2024.

FIGURE 297 REMOTE WORK NEXT YEAR VS CURRENT



When compared to their respective counterparts, independent contractors, those working in small companies (less than five employees), and those in real estate and management industries had the highest percentage anticipating that they would work *less often* from home in 2024 when compared to today (see Figures 298-301).

FIGURE 298 REMOTE WORK NEXT YEAR VS CURRENT BY AGE, GENDER, INDEPENDENT CONTRACTOR & SURVEY LANGUAGE

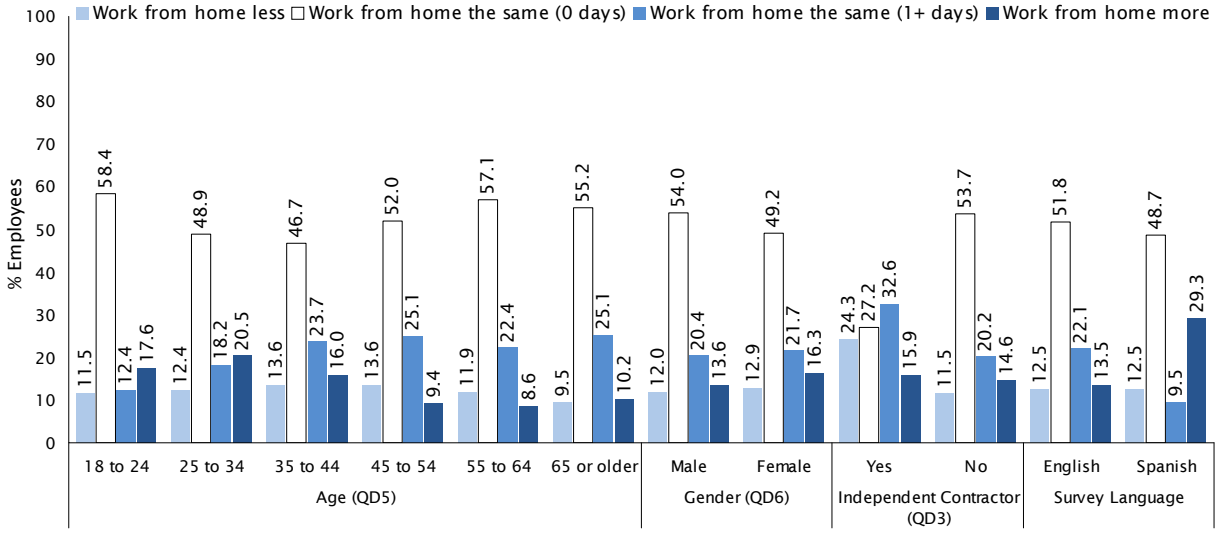


FIGURE 299 REMOTE WORK NEXT YEAR VS CURRENT BY ETHNICITY & HOUSEHOLD INCOME

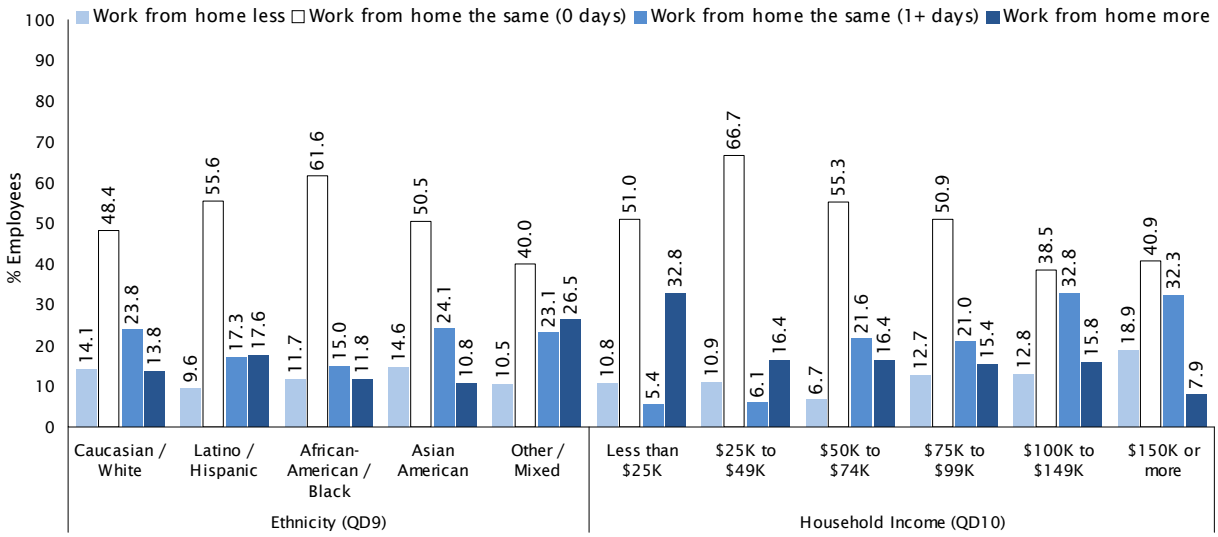


FIGURE 300 REMOTE WORK NEXT YEAR VS CURRENT BY SAN DIEGO COUNTY SUBREGION & NUMBER OF EMPLOYEES AT COMPANY

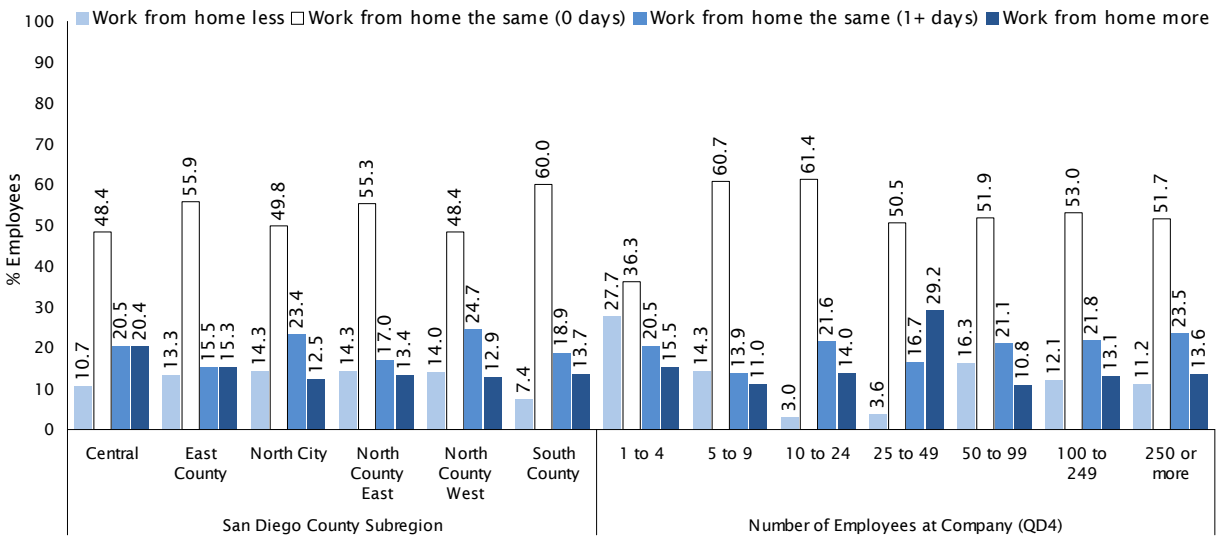
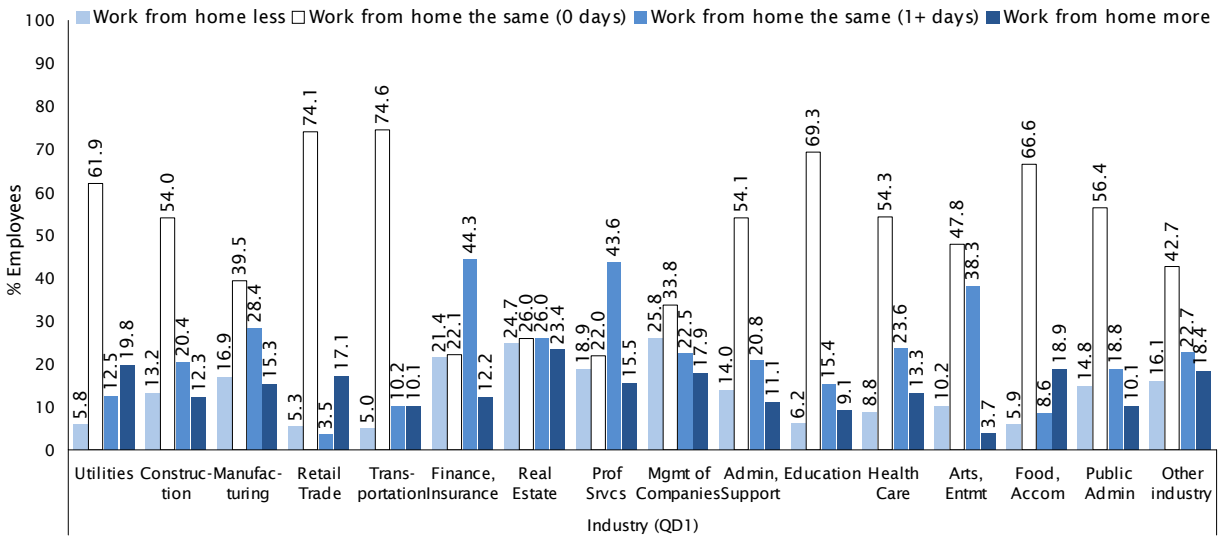


FIGURE 301 REMOTE WORK NEXT YEAR VS CURRENT BY INDUSTRY



WORKING REMOTE LESS NEXT YEAR - WHOSE PREFERENCE? Employees who reported that they anticipate working fewer days from home one year from now when compared to their 2023 schedule were subsequently asked whether that was their personal preference (Question 26) and whether their employer would allow them to continue working from home the same number of days as they are currently (Question 27). The answers to both questions are combined in Figure 302.

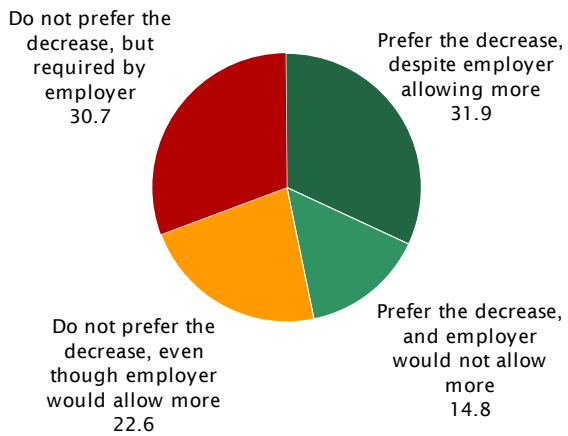
Approximately one-third of employees (31%) who indicated that they anticipated working remotely less often in 2024 stated that it was *not* their preference, but their employer required the change. An additional 23% indicated the change was not their preference and their employer did not require a change, thus suggesting a separate factor was motivating their reduction in remote working. Nearly half of employees *preferred* to decrease the number of days they work

remotely in 2024, with this group being split between those whose employers did not require the change (32%) and those whose employers also sought to reduce their days working remotely (15%).

2023 Survey, Question 26 *You indicated that you expect to work fewer days from home one year from now when compared to your current schedule. Is this because you prefer to reduce the number of days you work from home?*

2023 Survey, Question 27 *One year from now, will your employer allow you to continue working from home <insert Q4> days per week?*

FIGURE 302 OPINION OF WORKING FEWER DAYS FROM HOME NEXT YEAR



NO CHANGE TO REMOTE WORK NEXT YEAR - WHOSE PREFERENCE?

Employees who reported that they anticipate working the same number of days from home one year from now when compared to their current schedule[23] were subsequently asked whether that was their personal preference (Question 28) and whether their employer will require that employees work from home at least part of the time next year (Question 29). The answers to both questions are combined in Figure 303 on the next page.

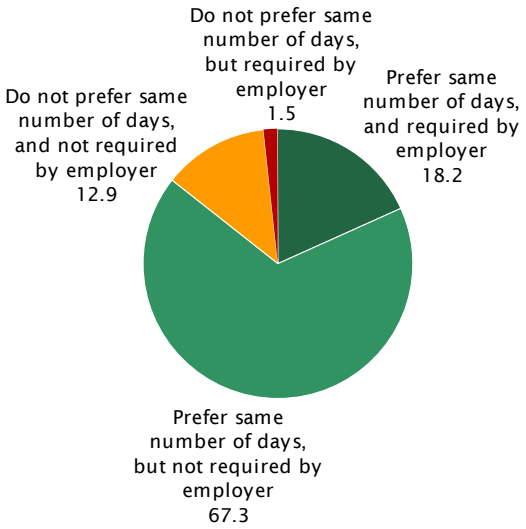
Two-thirds of employees (67%) who indicated that they anticipated working remotely the same amount in 2024 indicated that it was their preference, although their employer did not require remote work. An additional 18% indicated that keeping their current remote work schedule in 2024 was their preference, but their employer will also require employees to work from home at least part time during this period. Approximately 14% of employees indicated that they did *not* prefer to keep their same remote work schedule one year from now, with this group being split between those whose employers did not require remote work (13%) and those whose employers mandated that employees work from home at least part of the time (2%).[24]

23. For clarity, employees who reported zero remote work days during the current period *and* expected zero remote work days in 2024 were removed from this analysis.
24. Note that among employees who preferred to *not* keep their current remote work schedule, some may prefer to increase their remote work days, while others may prefer to decrease the days they work remotely.

2023 Survey, Question 28 *You indicated that you expect to work the same number of days from home one year from now as you do currently. Is this because you prefer to keep the number of days you work from home the same?*

2023 Survey, Question 29 *Has your employer indicated that - one year from now - employees must work from home at least part of the time?*

FIGURE 303 OPINION OF WORKING SAME DAYS FROM HOME NEXT YEAR



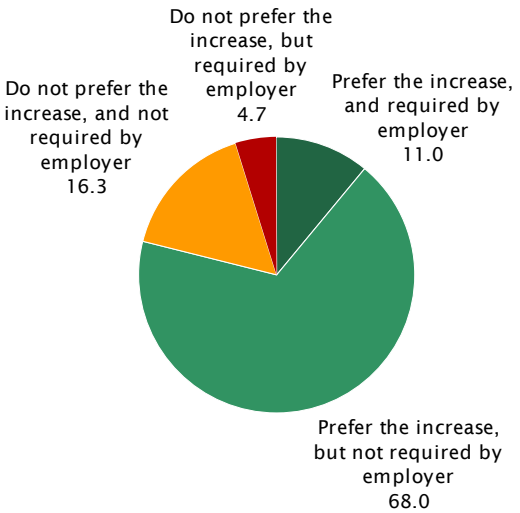
WORKING REMOTE MORE NEXT YEAR - WHOSE PREFERENCE? Employees who reported that they anticipate working more days from home one year from now when compared to their current schedule were subsequently asked whether that was their personal preference (Question 30) and whether their employer will require that employees work from home at least part of the time in 2024 (Question 31). The answers to both questions are combined in Figure 304.

Approximately eight-in-ten employees who anticipated working more days from home in 2024 reported that it was their preference to do so, with this group being divided between those whose employers did not require remote work (68%) and those whose employers mandated that employees work from home at least part time (11%). Among the 21% of employees who did *not* prefer the anticipated increase in remote work days in 2024, most also indicated that it was not required by their employer (16%), while a few (5%) indicated that their employer required the change.

2023 Survey, Question 30 *You indicated that you expect to work more days from home one year from now when compared to your current schedule. Is this because you prefer to increase the amount of days you work from home?*

2023 Survey, Question 31 *Has your employer indicated that - one year from now - employees must work from at least part of the time?*

FIGURE 304 OPINION OF WORKING MORE DAYS FROM HOME NEXT YEAR



ANTICIPATE CHANGING EMPLOYER NEXT YEAR?

The final substantive questions of the 2023 tracking survey asked employees whether they anticipated changing employers in the next 12 months and—if yes—the primary reason for doing so. Approximately one-in-five employees surveyed in 2024 (22%) anticipated that they will change employers at some point during the next 12 months (Figure 305), with younger individuals (under 25), those who completed the survey in Spanish, those from low-income households, and individuals who primarily rely on public transit being the most likely to anticipate a change in employers (see figures 306-309).

2023 Survey, Question 32 *Do you anticipate that you will change employers in the next 12 months?*

FIGURE 305 ANTICIPATE CHANGING EMPLOYER NEXT YEAR

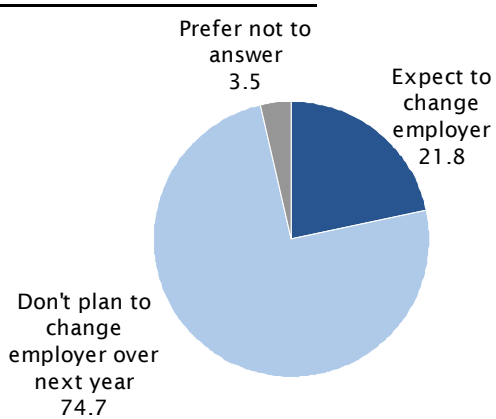


FIGURE 306 ANTICIPATE CHANGING EMPLOYER NEXT YEAR BY AGE, GENDER, INDEPENDENT CONTRACTOR & SURVEY LANGUAGE

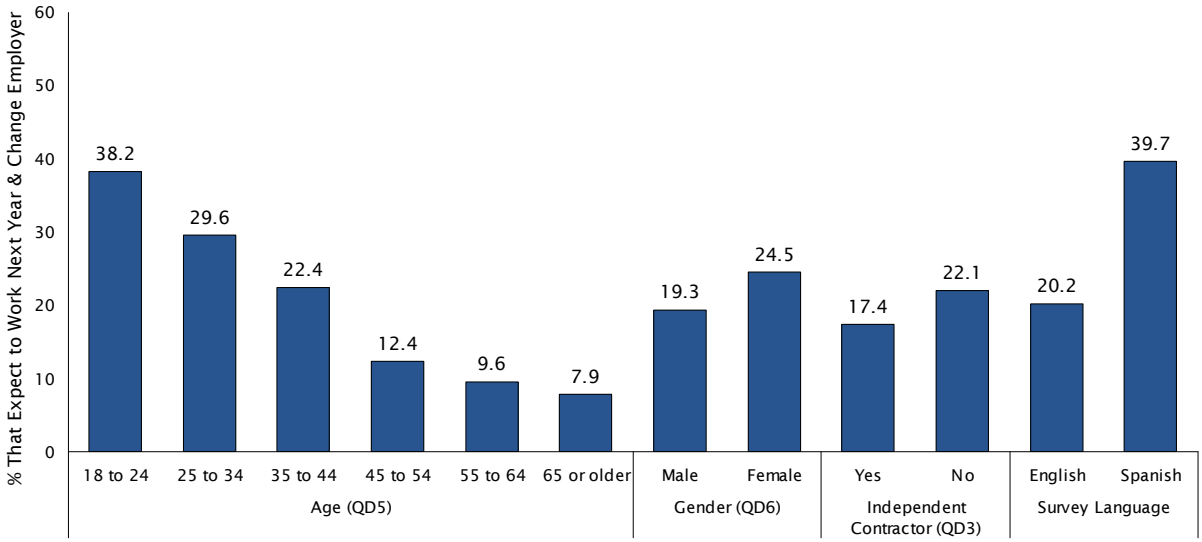


FIGURE 307 ANTICIPATE CHANGING EMPLOYER NEXT YEAR BY ETHNICITY & HOUSEHOLD INCOME

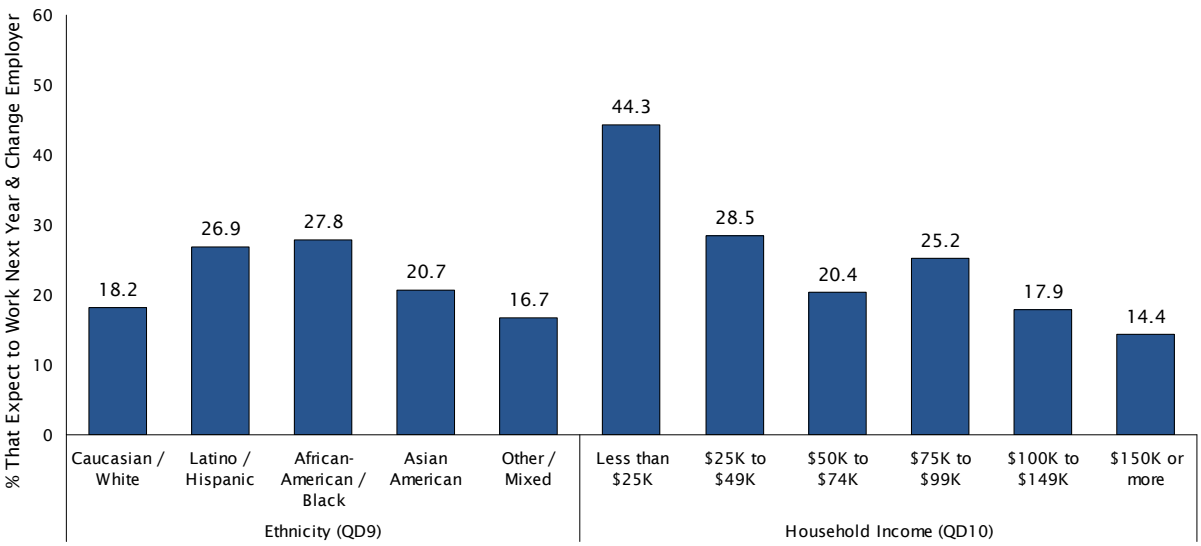


FIGURE 308 ANTICIPATE CHANGING EMPLOYER NEXT YEAR BY SAN DIEGO COUNTY SUBREGION, CURRENT REMOTE WORK STATUS & CURRENT PRIMARY COMMUTE MODE

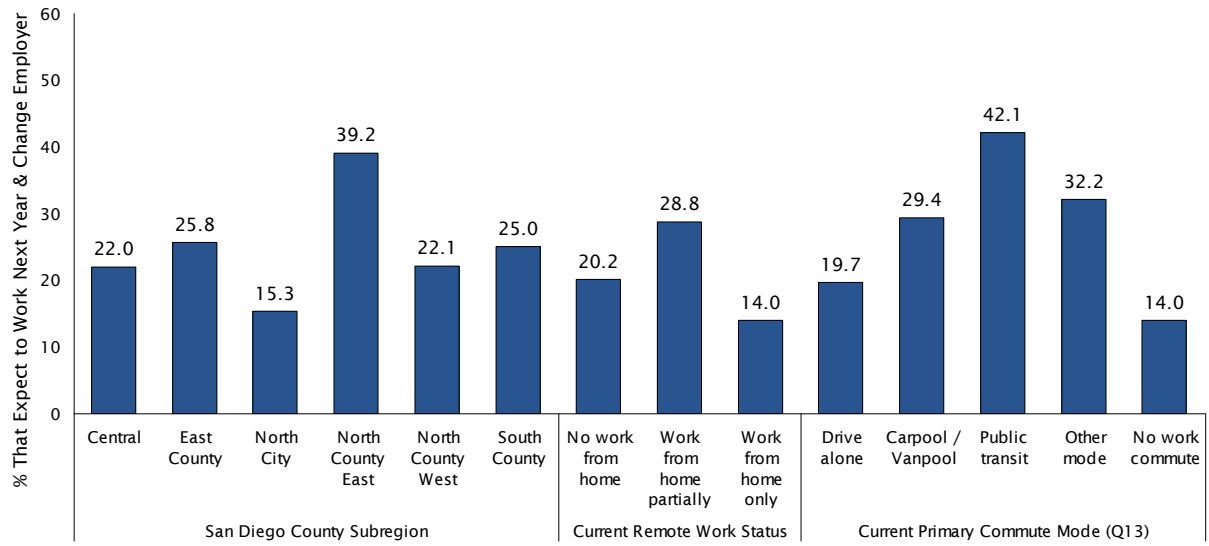
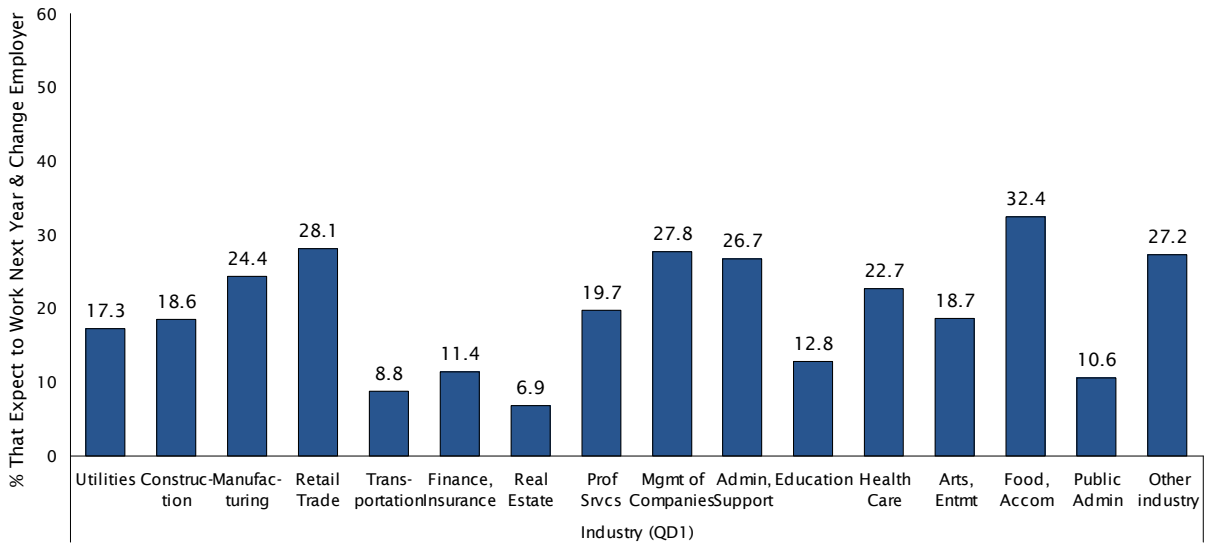


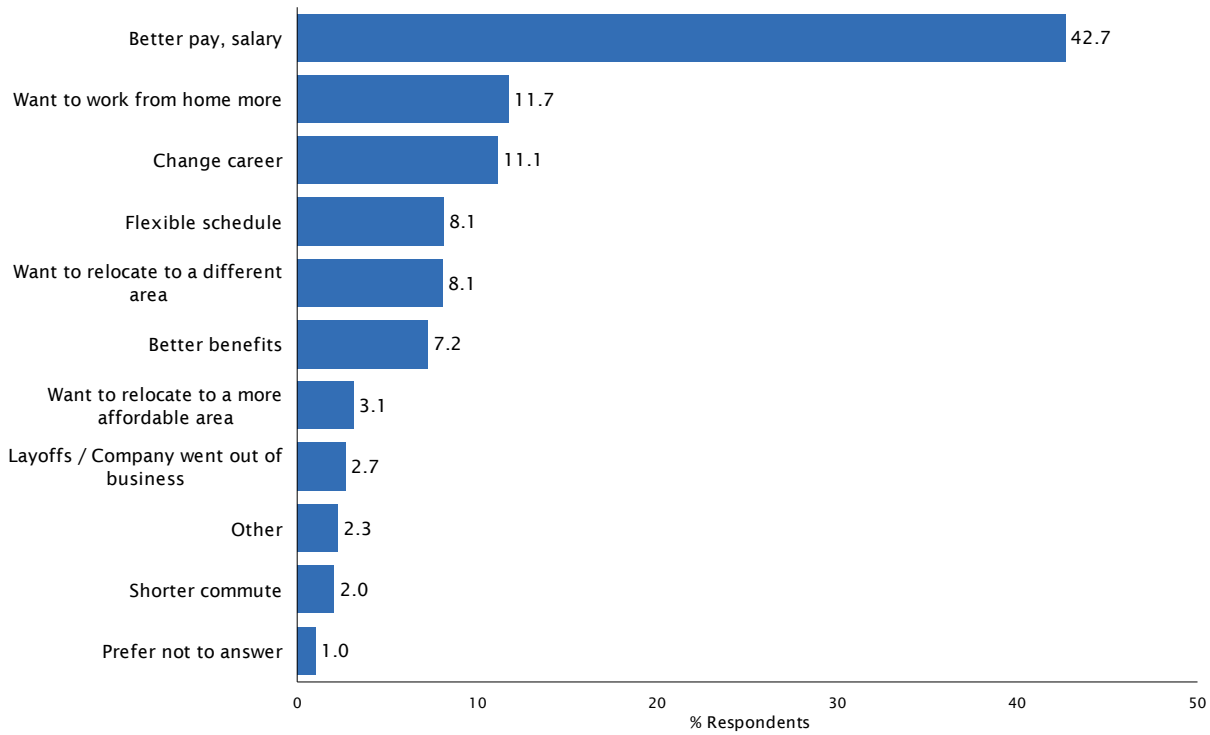
FIGURE 309 ANTICIPATE CHANGING EMPLOYER NEXT YEAR BY INDUSTRY



Among the reasons offered for *why* they anticipated changing employers (see Figure 310 on the next page), a desire for better pay/salary was the dominant response (43%), followed by a desire to work more from home (12%), a change in career (11%), wanting a more flexible work schedule (8%), a desire to move to a different area (8%), and seeking better benefits (7%).

2023 Survey, Question 33 *What is the main reason why you expect to change employers?*

FIGURE 310 MAIN REASON EXPECT TO CHANGE EMPLOYER NEXT YEAR



METHODOLOGY

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 SANDAG staff to develop questionnaires 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. The final questionnaires for the tracking surveys for both the Business Survey and Employee Survey can be found in the next section of this report (see *Questionnaires* on page 190). The reader should note that in order to avoid a systematic position bias, battery-style questions that included multiple individual items employed randomization to ensure that the items were asked in a random order for each respondent. Many of the questions asked in the tracking surveys were identical to those included in the baseline surveys to allow for direct comparisons over time.

Both tracking surveys employed skip logic to ensure that respondents were only asked questions that were appropriate to their situation or circumstances. For example, only businesses that reported they currently offer some employees the option to work from home (Question 1) were asked follow-up questions regarding what percentage of employees had the option (Question 2), as well as what percentage worked from home at least one day per week (Question 3), at least three days per week (Question 4), and always work from home (Question 5). The questionnaires included with this report identify 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 questionnaires were 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 happen during the interview. The survey was also programmed into a passcode-protected online survey application to allow online participation. Both questionnaires were pre-tested internally by True North and with a small selection of businesses (25) and employees (52) prior to formally beginning the surveys. The final version of the Employee Survey was also professionally translated into Spanish to allow for data collection in English and Spanish languages.

SAMPLE OF BUSINESSES Working with data from the Employment Development Department (EDD), SANDAG staff was able to unpack and enhance the data to provide a refined breakdown of businesses in the San Diego region by industry and number of employees. As shown in Figure 311 on the next page, of the 187,579 known businesses in the region, most are either small businesses with less than five employees (60,634) or are classified as 'unknown' with respect to employee size (90,626). Approximately four-in-ten businesses are also classified as 'unknown' for industry (78,352), with the remaining businesses showing concentrations in Health Care and Social Assistance (35,031), Professional, Scientific and Technical Services (16,522), Retail Trade (8,994), Other Services (8,270), and Accommodation and Food Services (7,510).

FIGURE 311 NUMBER OF BUSINESSES IN SAN DIEGO REGION BY INDUSTRY & EMPLOYEE SIZE

NAICS	Description	Number of Employees								
		Unknown	1-4	5-9	10-24	25-49	50-99	100-249	250+	Total
22	Utilities	9	52	15	24	15	15	9	6	145
31-33	Manufacturing	240	1,225	709	572	310	231	139	83	3,509
42	Wholesale Trade	366	2,078	826	543	213	93	32	13	4,164
44-45	Retail Trade	547	3,289	2,362	1,495	608	427	169	47	8,944
48-49	Transportation and Warehousing	205	908	368	246	139	116	34	24	2,040
51	Information	197	679	214	151	81	57	32	8	1,419
52	Finance and Insurance	470	2,759	861	495	135	78	38	18	4,854
53	Real Estate and Rental and Leasing	1,113	4,203	824	414	113	55	19	4	6,745
54	Professional, Scientific, and Technical Services	2,713	9,429	2,054	1,268	541	299	148	70	16,522
55	Management of Companies and Enterprises	18	111	57	56	37	45	27	23	374
56	Administrative and Support and Waste Management and Remediation Services	588	2,361	880	480	272	181	96	66	4,924
61	Educational Services	168	782	493	337	372	495	92	44	2,783
62	Health Care and Social Assistance	4,297	25,848	2,463	1,318	540	309	171	85	35,031
71	Arts, Entertainment, and Recreation	231	644	312	206	124	59	16	18	1,610
72	Accommodation and Food Services	299	1,345	1,726	2,138	1,377	476	118	31	7,510
81	Other Services (except Public Administration)	813	4,869	1,610	682	201	66	22	7	8,270
92	Public Administration	0	52	77	74	63	41	31	45	383
N/A	Unknown	78,352	0	0	0	0	0	0	0	78,352
	Total	90,626	60,634	15,851	10,499	5,141	3,043	1,193	592	187,579

Exclusions, Oversampling & Weighting Because the Business Survey focused on remote work practices and policies, three industries were removed from the sampling frame due to their limited telework potential: NAICS 11 - Agriculture, Forestry, Fishing and Hunting, NAICS 21 - Mining, Quarrying, and Oil and Gas Extraction, and NAICS 23 - Construction. Collectively, these industries account for approximately 8,828 businesses in the San Diego region (5% of all businesses in the region). Within firm size categories (columns), interviews were assigned proportionately across industries based on the number of firms in each industry.[25]

Table 1 on the next page summarizes the sample plan for the tracking survey of businesses, the actual number of completed interviews, and the close alignment between the *sample* and the *universe* of businesses once the data were weighted to adjust for oversampling by business size, industry, and location. Although the goal was 500 completed interviews, productivity was better than anticipated, resulting in 627 completed interviews among businesses.

25.Firms of unknown size or industry were removed for the purposes of assigning interviews to specific industries and firm size categories.

TABLE 1 COMPARISON OF BUSINESS UNIVERSE AND SAMPLE FOR TRACKING SURVEY

	Completed Survey Goal	Completed Survey Actual	Actual vs Goal	Universe[1]	Universe %	Completed Survey Weighted	Weighted Sample %	Weighted Sample % vs Universe %
Number of Employees at Location								
1 to 4	225	291	+66	60,634	63%	365	58%	-4%
5 to 9	100	139	+39	15,851	16%	112	18%	2%
10 to 24	100	112	+12	10,499	11%	74	12%	1%
25 to 49	25	40	+15	5,141	5%	40	6%	1%
50 to 99	25	23	-2	3,043	3%	24	4%	1%
100 to 249	20	18	-2	1,193	1%	9	1%	0%
250 or more	5	4	-1	592	1%	3	1%	0%
Total	*500*	*627*	*+127*	*96,953*	*100%*	*627*	*100%*	
Tier 1 Employment Center								
Yes	100	103	+3	10,835	11%	83	13%	2%
No	400	524	+124	86,118	89%	544	87%	-2%
Total	*500*	*627*	*+127*	*96,953*	*100%*	*627*	*100%*	
NAICS/Industry								
22 Utilities	1	6	+5	136	0%	5	1%	1%
31-33 Manufacturing	17	52	+35	3,269	3%	30	5%	1%
42 Wholesale Trade	20	32	+12	3,798	4%	30	5%	1%
44-45 Retail Trade	43	50	+7	8,397	9%	45	7%	-1%
48-49 Transportation and Warehousing	9	11	+2	1,835	2%	11	2%	0%
51 Information	6	9	+3	1,222	1%	6	1%	0%
52 Finance and Insurance	23	32	+9	4,384	5%	30	5%	0%
53 Real Estate and Rental and Leasing	29	32	+3	5,632	6%	33	5%	-1%
54 Professional, Scientific, and Technical Services	71	152	+81	13,809	14%	98	16%	1%
55 Management of Companies and Enterprises	2	1	-1	356	0%	1	0%	0%
56 Administrative and Support/Waste Management/Remediation Services	22	36	+14	4,336	4%	33	5%	1%
61 Educational Services	13	19	+6	2,615	3%	14	2%	0%
62 Health Care and Social Assistance	158	64	-94	30,734	32%	176	28%	-4%
71 Arts, Entertainment, and Recreation	7	16	+9	1,379	1%	13	2%	1%
72 Accommodation and Food Services	37	46	+9	7,211	7%	34	5%	-2%
81 Other Services (except Public Administration)	38	61	+23	7,457	8%	60	10%	2%
92 Public Administration	2	8	+6	383	0%	7	1%	1%
Total	*500*	*627*	*+127*	*96,953*	*100%*	*627*	*100%*	

1 Universe counts for number of businesses by industry and number of employees were provided by SANDAG, utilizing San Diego County Labor Force and Industry Employment Estimates.

EMPLOYEE SAMPLE The Employee Survey sample began with a comprehensive list of households in San Diego County, stratified into six subregions (Central, East County, North City, North County East, North County West, and South County). Once households were selected at random, contact information was appended to the records (telephone and/or email address) using publicly available data and private database matching services. In addition to allowing us to efficiently stratify households by subregion of interest, this approach allowed us to use an effective combination of email *and* telephone calls for recruiting purposes, which counteracts the impacts of call-screening.

Because the study focused on employees, potential respondents were initially screened regarding their current employment status to select only those who were currently employed. Quotas were also set within each subregion to ensure the sample was balanced by age according to the latest American Community Survey (ACS) 5 year estimates for employees in each subregion. Once data collection was complete, the data were also weighted to balance the distribution of employees by age within subregions (according to ACS data) and industry according to the California Employment Development Department's (EDD) San Diego County Labor Force and Industry Employment Estimates for January 2023. Table 2 on the next page shows the employee universe distributions by subregion, age, and industry, as well as the close alignment between the final weighted sample and the universe on all three dimensions.

TABLE 2 COMPARISON OF EMPLOYEE UNIVERSE AND SAMPLE

		Universe[2]	Universe %	Completed Survey Weighted[3]	Weighted Sample %	Weighted Sample % vs Universe %
San Diego County Subregion[1]						
	Central	300,329	20%	215	20%	0%
	East County	237,931	15%	177	16%	1%
	North City	397,470	26%	281	26%	0%
	North County East	38,923	3%	28	3%	0%
	North County West	380,998	25%	258	23%	-1%
	South County	181,440	12%	141	13%	1%
	Total	*1,537,091*	*100%*	*1,100*	*100%*	
Age						
	16-24	169,713	11%	134	12%	1%
	25-34	384,840	25%	281	26%	1%
	35-44	348,451	23%	245	23%	0%
	45-54	301,690	20%	209	19%	0%
	55-64	245,703	16%	156	14%	-2%
	65+	86,694	6%	54	5%	-1%
	Total	*1,537,091*	*100%*	*1,078*	*100%*	
NAICS/Industry						
11	Agriculture	9,400	1%	3	0%	0%
22	Utilities	5,600	0%	11	1%	1%
23	Construction	88,800	6%	38	4%	-1%
31-33	Manufacturing	117,800	7%	88	10%	2%
42	Wholesale Trade	42,800	3%	5	1%	-2%
44-45	Retail Trade	137,400	9%	127	14%	5%
48-49	Transportation and Warehousing	36,100	2%	27	3%	1%
51	Information	21,800	1%	12	1%	0%
52	Finance and Insurance	45,700	3%	35	4%	1%
53	Real Estate and Rental and Leasing	31,800	2%	24	3%	1%
54	Professional, Scientific, and Technical Services	161,300	10%	88	10%	-1%
55	Management of Companies and Enterprises	24,300	2%	0	0%	-2%
56	Administrative and Support/Waste Management/Remediation Services	103,800	7%	39	4%	-2%
61	Educational Services	30,800	2%	37	4%	2%
62	Health Care and Social Assistance	204,600	13%	121	13%	0%
71	Arts, Entertainment, and Recreation	32,600	2%	20	2%	0%
72	Accommodation and Food Services	171,000	11%	44	5%	-6%
81	Other Services (except Public Administration)	57,500	4%	32	4%	0%
92	Public Administration	252,400	16%	164	18%	2%
	Total	*1,575,500*	*100%*	*915*	*100%*	

1 San Diego County Subregion categorized by ZIP code of respondent.

2 Subregion and Age counts gathered from U.S. Census Bureau, 2021 American Community Survey (ACS) 1-year estimates; NAICS/Industry counts gathered from San Diego County Labor Force and Industry Employment Estimates for March 2023.

3 Weighted counts for Age and NAICS/Industry shown for survey participants who provided a response to those questions.

RECRUITING & DATA COLLECTION Businesses and employees were recruited to participate in the survey using a combination of emailed invitations, text invitations, and/or telephone calls.[26] Individuals that received an email invitation and/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 individuals 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 email and text invitations or that only had landline telephone contact information were recruited to participate in the survey by telephone (land lane and/or cell phone).

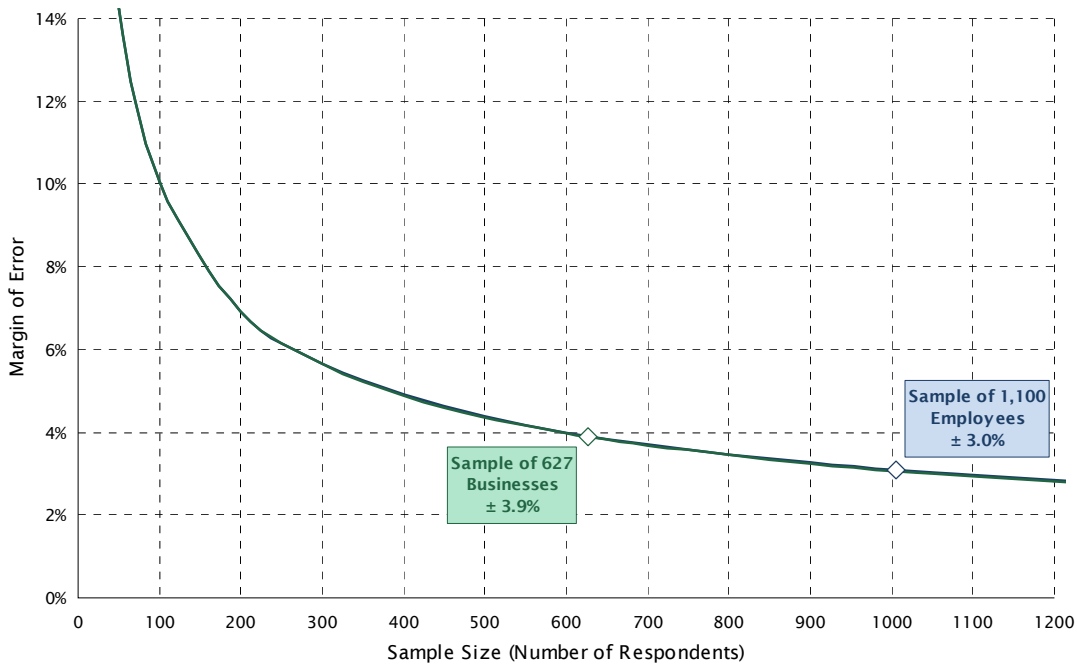
Telephone interviews averaged 15 minutes in length for businesses and were conducted during normal business hours (9AM to 5PM) weekdays between April 24, and May 24, 2023. Employee surveys also averaged 15 minutes in length, but were conducted during weekday evenings (5:30PM to 9PM) and on weekends (10AM to 5PM) between April 12, and April 24, 2023.

26. The recruiting method(s) selected for a respondent depended on the contact information that was available for that particular business or household.

MARGIN OF ERROR By using stratified samples and monitoring the sample characteristics as data collection proceeded, True North ensured the samples were representative of businesses and employees who are located/reside in the San Diego region. The results of the surveys can thus be used to estimate the opinions of *all* businesses and employees in the region. Because not every business and employee 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, for example, in the survey of 1,100 employees for a particular question and what would have been found if all of the estimated 1,575,500 employees in the region had been surveyed.

Figure 312 presents the margin of error equation as a graph, plotting sample sizes along the bottom axis. There are two lines represented in the graph, which largely overlap—one for the Business Survey and one for the Employee Survey. As shown in the figure, the maximum margin of error in the Employee Survey for questions answered by all 1,100 respondents is ± 3.0%, whereas the maximum margin of error for questions answered by all 627 businesses is ± 3.9%.

FIGURE 312 MAXIMUM MARGIN OF ERROR



Within this report, figures and tables show how responses to certain questions varied by subgroups of businesses and employees. Figure 312 is thus useful for understanding how the maximum margin of error for a percentage estimate will grow as the number of individuals asked a question (or within a particular subgroup) shrinks. Because the margin of error grows exponentially as sample size decreases, the reader should use caution when generalizing and interpreting results for small subgroups.

DATA PROCESSING Data processing consisted of checking the data for errors or inconsistencies, coding and recoding responses, categorizing verbatim responses, weighting, and preparing frequency analyses and crosstabulations.

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 figures for a given question.

TRUE NORTH RESEARCH

SANDAG
Remote Work Tracking Study
Business Survey
Final Toplines (n=627)

Section 1: Introduction to Study
Hi, my name is _____ and I'm calling on behalf of the San Diego Association of Governments, also known as SANDAG. We're conducting a short, confidential survey of businesses in San Diego County to better understand how they have recovered from the pandemic. We'd like to ask you a few questions – and to show our appreciation for completing the survey, we will send you a $10 Amazon gift card via email.
If needed: This is a survey only– I'm NOT trying to sell anything and I won't ask for a donation. *If needed:* The survey should take no longer than 10 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?

Section 2: Screener for Inclusion in the Study				
SC1	To begin, let me ask you about your position with your company. Are you: _____?			
Read in Order		Yes	No	Prefer not to answer
A	In an executive position with your company	86%	13%	1%
If SC1A=1 they are qualified and can skip to intro preceding Q1. If SC1A=(2,99), ask SC1B.				
B	In a director or senior position in human resources (HR)	11%	87%	2%
If SC1B=1 they are qualified and can skip to intro preceding Q1. If SC1B=(2,99), ask SC1C				
C	Very familiar with your company's policies and practices when it comes to remote work, also known as teleworking	100%	0%	0%
If SC1C=1 they are qualified and can skip to intro preceding Q1. If not, ask to speak to qualified person (see instruction below).				
If not qualified, ask: We are interested in speaking with a person at your business who is knowledgeable about your company's remote work policies Can you direct me to this person?				

Section 3: Remote Work – Current Patterns				
Next, I'd like to ask about your company's **current** remote work practices.				
Q1	Currently, are some employees at your company given the **option** to work from home at least one day per week?			
	1	Yes	57%	*Ask Q2*
	2	No	43%	*Skip to Q6*

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Q2	Approximately what percentage of your company's employees currently have the **option** to work from home **at least one day** per week? Percentage recorded in 5% increments and later grouped into categories shown below. All respondents summarized here, with those who said No at Q1 coded here as 0%.	
	0%	43%
	1% to 24%	12%
	25% to 49%	3%
	50% to 74%	4%
	75% or more	37%
	Prefer not to answer	1%
Q3	Currently, approximately what percentage of your company's employees actually **work from home** at least **one day** per week? Percentage recorded in 5% increments and later grouped into categories shown below. All respondents summarized here, with those who said No at Q1 or 0% at Q2 coded here as 0%.	
	0%	44%
	1% to 24%	14%
	25% to 49%	3%
	50% to 74%	6%
	75% or more	32%
	Prefer not to answer	1%
	If Q3=0%, OR Q2=99 AND Q3=99, skip to intro preceding instruction preceding Q6.	
Q4	Currently, approximately what percentage of your company's employees work from home **most of the time** – at least **three days** per week? Percentage recorded in 5% increments and later grouped into categories shown below. All respondents summarized here, with those who previously said No at Q1 or 0% at Q2 or Q3 coded here as 0%.	
	0%	53%
	1% to 24%	11%
	25% to 49%	5%
	50% to 74%	5%
	75% or more	24%
	Prefer not to answer	2%

If Q4=0%, OR Q3=99 AND Q4=99 skip to intro preceding instruction preceding Q6.		
Q5	Currently, approximately what percentage of your company's employees **always** work from home. In other words, they work from home **every** work day. Percentage recorded in 5% increments and later grouped into categories shown below. All respondents summarized here, with those who previously said No at Q1 or 0% at Q2, Q3, or Q4 coded here as 0%.	
	0%	60%
	1% to 24%	14%
	25% to 49%	4%
	50% to 74%	4%
	75% or more	17%
	Prefer not to answer	1%

Section 4: Barriers to Remote Work		
Ask Q6 if Q1=2. Otherwise skip to Q7.		
Q6	What would you say is the **main** reason why employees are not allowed to work from home at least one day per week? Verbatim responses recorded and later grouped into categories shown below.	
	Not possible for type of work, industry, occupations	69%
	Small company, minimal staff, need to be onsite	8%
	Productivity, accountability issues	8%
	Required equipment, technology, machinery is onsite	5%
	Requires face-to-face, in-person employee interaction	5%
	Prefer not to answer	4%
	Clients prefer face-to-face, in-person	2%
	Not sure / Cannot think of anything	1%
Q7	During the **pandemic in 2020**, approximately what percentage of the employees in your company worked from home at least one day per week? *If unsure, ask to estimate.* Percentage recorded in 5% increments and later grouped into categories shown below	
	0%	50%
	1% to 24%	15%
	25% to 49%	3%
	50% to 74%	5%
	75% or more	24%
	Prefer not to answer	3%

Section 5: Impacts of Remote Work			
Ask Q8 if Q3>0%. If Q3=(0% or Prefer not to answer) skip to instruction preceding Q18.			
Q8	Overall, would you say that having some employees working from home makes your company more productive, less productive, or does it not impact your productivity?		
	1	More productive	33%
	2	Less productive	19%
	3	No impact on productivity	44%
	98	Not sure	4%
	99	Prefer not to answer	0%
Q9	What would you say is the biggest **challenge** or **drawback** for your business that comes from employees working from home? Verbatim responses recorded and later grouped into categories shown below.		
	No challenges, drawbacks		25%
	Personal interaction, no in-person meetings		16%
	Communication		12%
	Team synergy, brainstorming		11%
	Collaboration, teamwork, workflow		6%
	Productivity		6%
	Supervision		5%
	Lack of support, social connection		5%
	Lack of focus		4%
	Accountability		3%
	Lack of training		3%
	Hard to create a company culture		3%
	Technology (Internet connection, printer, file access)		2%
	Time management		2%
	Personal, home challenges, schedules		2%
	Slow decision making		2%
	Sense of community, employee involvement		2%
	Some work can only be done onsite		2%
	Not sure / Cannot think of anything		2%

Q10	What would you say is the biggest **benefit** for your business that comes from employees working from home? Verbatim responses recorded and later grouped into categories shown below.	
	Flexibility	24%
	Employee satisfaction	19%
	Reduced expenses, overhead	18%
	Less commute, travel	12%
	Increase in productivity, efficiency	12%
	No benefits	11%
	Work-life balance	8%
	Not sure / Cannot think of anything	7%
	Improved employee morale	4%
	Ability to retain, accommodate employees	4%
	Health, safety of employees	2%
	Less stress	2%
	Easier to focus, fewer interruptions	2%
	Ability to recruit new hires	2%

Q11	Next are a few questions about how remote work impacts certain aspects of your business. In general, do you find that employees working from home has helped, had no impact, or hurt: _____? *If helped or hurt, ask:* Would you say it has (helped/hurt) a lot or somewhat?							
	Randomize	Helped a lot	Helped somewhat	No Impact	Hurt somewhat	Hurt a lot	Not Sure	Prefer not to answer
A	Employee morale	32%	29%	19%	13%	5%	2%	0%
B	Teamwork	9%	9%	31%	38%	10%	2%	0%
C	Communication and coordination	10%	11%	35%	34%	8%	2%	0%
D	The ability to meet deadlines	14%	15%	53%	13%	3%	1%	0%
E	The quality of work	14%	18%	50%	12%	5%	1%	0%
F	Business expenses	29%	27%	31%	7%	2%	2%	0%
G	The ability to identify and manage poor performing employees	10%	8%	40%	30%	9%	2%	2%
H	The ability to retain good employees	30%	30%	31%	3%	3%	3%	1%
I	Profitability	18%	16%	49%	9%	4%	2%	1%
J	Data security	6%	8%	64%	12%	4%	5%	0%
K	Your company's ability to hire people who live in the San Diego region	11%	17%	61%	3%	2%	5%	1%
L	Your company's ability to hire people who **don't** live in the San Diego region	30%	15%	42%	1%	2%	6%	5%

Q12	In response to employees working from home, has your business: _____?			
Randomize		Yes	No	Prefer not to answer
A	Reduced its building square footage, or made plans to do so	43%	55%	1%
B	Terminated building leases, or made plans to do so	33%	65%	2%
C	Improved communications hardware or software	55%	43%	1%
D	Purchased technology such as computers, printers or phones for employees to keep at home	68%	31%	1%
E	Changed its data security processes	48%	51%	1%
F	Expanded its online presence	44%	56%	0%
G	Experienced problems because some employees have poor Internet access at home	29%	70%	1%

Q13	Do employees have the flexibility to *change* which days of the week they work from home, or do employees have set days of the week that they work from home?		
	1	Employees can change which days of the week that they work from home	66%
	2	Employees have set days of the week that they work from home	26%
	98	Not sure	4%
	99	Prefer not to answer	4%

Q14	During the past two years, has your company allowed some existing employees to move away from the San Diego region and keep their jobs by working from home?		
	1	Yes	38%
	2	No	60%
	98	Not sure	1%
	99	Prefer not to answer	1%

Q15	During the past two years, has your company hired people who live in other parts of the State or country and allowed them to stay where they are, rather than relocate to the San Diego region?		
	1	Yes	44%
	2	No	51%
	98	Not sure	3%
	99	Prefer not to answer	3%

Q16	Would you say that your company's **experiences** with employees working from home are better now, worse now, or about the same as they were in 2020 during the pandemic?			
	1	Better now	46%	*Ask Q17*
	2	Worse now	4%	*Ask Q17*
	3	About the same	47%	*Skip to Q18*
	98	Not sure	2%	*Skip to Q18*
	99	Prefer not to answer	1%	*Skip to Q18*
Q17	What makes your company's remote work experiences <better/worse> now? Verbatim responses recorded and later grouped into categories shown below.			
	Better technology		24%	
	More experience, familiarity with it		19%	
	Happier employees, improved morale		14%	
	More work flexibility		11%	
	Better communication		9%	
	Not sure / Cannot think of anything		8%	
	More disciplined use of time		7%	
	Has become normalized, accepted across industries, clients		7%	
	More comfortable, better communication in-person, face-to-face		7%	
	Improved work-life balance		4%	
	Fewer gas, childcare expenses		2%	
Ask of all respondents.				
Q18	During the past two years, has your company found it **difficult** to attract and retain highly qualified employees because the employees want to work from home more often than your company allows for the position? *If yes, ask:* Would you say it's been very difficult or somewhat difficult?			
	1	Yes, very difficult	9%	
	2	Yes, somewhat difficult	15%	
	3	No	70%	
	98	Not sure	5%	
	99	Prefer not to answer	1%	

Section 6: Post-Pandemic Plans				
Next, let me ask you about the future – one year from now. If you aren't sure about an answer, please give me your best estimate.				
Q19	One year from now, do you expect that some employees at your company will be given the **option** to work from home at least one day per week?			
	1	Yes	53%	*Ask Q20*
	2	No	47%	*Skip to Q24*
Q20	One year from now, approximately what percentage of your company's employees do you expect will have the **option** to work from home at least one day per week? Percentage recorded in 5% increments and later grouped into categories shown below. All respondents summarized here, with those who said No at Q19 coded here as 0%.			
	0%		47%	
	1% to 24%		9%	
	25% to 49%		3%	
	50% to 74%		5%	
	75% or more		34%	
	Prefer not to answer		2%	
Q21	One year from now, approximately what percentage of your company's employees do you expect will actually **work from home** at least one day per week? Percentage recorded in 5% increments and later grouped into categories shown below. All respondents summarized here, with those who said No at Q19 or 0% at Q20 coded here as 0%.			
	0%		47%	
	1% to 24%		11%	
	25% to 49%		3%	
	50% to 74%		6%	
	75% or more		31%	
	Prefer not to answer		1%	
If Q21=0%, OR Q20=99 AND Q21=99 skip to intro preceding Q25.				
Q22	One year from now, approximately what percentage of your company's employees do you expect will work from home **most of the time** – at least three days per week? Percentage recorded in 5% increments and later grouped into categories shown below. All respondents summarized here, with those who said No at Q19 or 0% at Q20 or Q21 coded here as 0%.			
	0%		55%	
	1% to 24%		10%	
	25% to 49%		5%	
	50% to 74%		5%	
	75% or more		22%	
	Prefer not to answer		3%	

If Q22=0%, OR Q21=99 AND Q22=99 skip to Q24.			
Q23	One year from now, approximately what percentage of your company's employees will **always** work from home. In other words, they work from home every work day. Percentage recorded in 5% increments and later grouped into categories shown below. All respondents summarized here, with those who said No at Q19 or 0% at Q20, Q21, or Q22 coded here as 0%.		
	0%		62%
	1% to 24%		11%
	25% to 49%		4%
	50% to 74%		4%
	75% or more		17%
	Prefer not to answer		3%
Q24	One year from now, will working from home be **mandatory** for any employees? In other words, will some employees be **required** to work from home at least some of the time?		
	1	Yes	20%
	2	No	78%
	99	Prefer not to answer	2%

Section 7: Company Characteristics		
I have just a few more background questions about your business for statistical purposes.		
Q25	Thinking of full-time *and* part-time employees, approximately how many people does your company employ in San Diego County?	
	1 to 4	24%
	5 to 9	28%
	10 to 24	16%
	25 to 49	9%
	50 to 99	7%
	100 to 249	5%
	250 or more	5%
	Prefer not to answer	5%

Q26	What **industry** is your company a part of? *If hesitates, ask:* What does your company do?			
	22	Utilities	1%	
	31-33	Manufacturing	5%	
	42	Wholesale Trade	5%	
	44-45	Retail Trade	7%	
	48-49	Transportation and Warehousing	2%	
	51	Information	1%	
	52	Finance and Insurance	5%	
	53	Real Estate and Rental and Leasing	5%	
	54	Professional, Scientific, and Technical Services	16%	
	55	Management of Companies and Enterprises	<1%	
	56	Administrative and Support and Waste Management and Remediation Services	5%	
	61	Educational Services	2%	
	62	Health Care and Social Assistance	28%	
	71	Arts, Entertainment, and Recreation	2%	
	72	Accommodation and Food Services	5%	
	81	Other Services (except Public Administration)	10%	
	92	Public Administration	1%	
Q27	Is there free employee parking at your business location, or do employees generally pay for parking?			
	1	Free parking for employees	89%	
	2	Employees pay for parking	4%	
	99	Prefer not to answer	6%	
Q28	Thank you so much for participating in this important survey! Can you provide me with an email to send the $10 Amazon eGift card? Your email will not be used for any other purpose or shared.			
		Email recorded	81%	*Skip to Q30*
	98	Does not want the $10 eGift card	13%	*Skip to Q30*
	99	Prefer not to share email	6%	*Ask Q29*

Only ask Q29 if Q28=99.			
Q29	How about a mobile phone number? The eGift card can be sent by text. Your phone number will not be used for any other purpose or shared. *If needed:* We need an email or a mobile phone number in order to distribute the $10 eGift card.		
		Mobile number recorded	12%
	98	Does not want the $10 eGift card	27%
	99	Prefer not to share mobile phone	62%
Q30	Would your business be interested in receiving support from SANDAG in developing and implementing a remote work program?		
	1	Yes	11%
	2	No	86%
	99	Prefer not to answer	3%
Those are all of the questions that I have for you! Thanks very much for participating.			

Post-Interview & Sample Items		
S1	Number of Employees at Location	
	1 to 4	58%
	5 to 9	18%
	10 to 24	12%
	25 to 49	6%
	50 to 99	4%
	100 to 249	1%
	250 or more	1%
S2	Employment Center	
	Downtown	3%
	Sorrento Valley	5%
	Kearny Mesa	5%
	Not Employment Center	87%

SANDAG
Remote Work Tracking Survey
Employee Version
Final Toplines (n=1,100)
June 21, 2023

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 SANDAG – San Diego County's regional planning agency. We're conducting a survey about important issues in San Diego 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 SANDAG – San Diego County's regional planning agency. We're conducting a survey about important issues in San Diego 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 10 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				
SC1	Before we begin, which best describes your current employment status? Are you employed full-time, employed part-time, self-employed, laid-off or furloughed, in between jobs, a student, a homemaker, or retired?			
	1	Employed full-time	71%	*Ask Q1*
	2	Employed part-time	18%	*Ask Q1*
	3	Self-employed	11%	*Ask Q1*
	4	Laid-off/furloughed	0%	*Go to Redirect Script*
	5	In between jobs	0%	*Go to Redirect Script*
	6	Student	0%	*Go to Redirect Script*
	7	Homemaker	0%	*Go to Redirect Script*
	8	Retired	0%	*Go to Redirect Script*
	99	Prefer not to answer	0%	*Go to Redirect Script*
Redirect Script: Thank you for your willingness to participate in this survey. However, because this survey focuses on employee commute behavior, we are only surveying people who are currently employed full-time, part-time, or self-employed. Is there a person available in your household that fits this description? *If yes, ask:* Can I speak with this person?				

Section 3: Local Issues			
Q1	To begin, how long have you lived in San Diego County?		
	1	Less than 1 year	2%
	2	1 to 2 years	6%
	3	3 to 4 years	6%
	4	5 to 9 years	11%
	5	10 to 14 years	10%
	6	15 years or longer	63%
	99	Prefer not to answer	1%

Q2	Thinking about San Diego County as a whole, what would you say is the most important issue facing San Diego County today? Verbatim responses recorded and later grouped into categories shown below.	
	Homelessness	38%
	Affordability of housing	15%
	High cost of living	11%
	Not sure / Cannot think of anything specific	9%
	Public safety, crime	7%
	Infrastructure, roads, streets	7%
	Rent control	5%
	Traffic congestion	4%
	Climate change, environmental issues	3%
	Inflation	3%
	High taxes	3%
	Water issues	2%
	Economy, jobs	2%
	High gas prices	2%
	Public transportation	2%
	Illegal immigration	2%
	Overdevelopment, population	2%
	Income inequality	2%
	Government, leadership, corruption	2%

Section 4: Current Employment & Commute

We're interested in your current employment arrangements and commute, as well as your expectations for the future. First, let me ask about your **current** situation.

Q3	Currently, how many days per week do you typically work?		
	0	Zero	0%
	1	One	1%
	2	Two	3%
	3	Three	7%
	4	Four	12%
	5	Five	64%
	6	Six	10%
	7	Seven	3%

Q4	Of the <**insert from Q3**> work days per week you typically work, how many of these days do you primarily work **from home**?			
	0	Zero	60%	
	1	One	7%	
	2	Two	8%	
	3	Three	7%	
	4	Four	4%	
	5	Five	10%	
	6	Six	2%	
	7	Seven	1%	
	99	Prefer not to answer	1%	
Ask Q5 if Q4>0. Otherwise skip to instruction preceding Q12.				
Q5	Of the <**insert from Q4**> days you *primarily* work from home, how many days do you typically work from home the **entire day** without commuting to a separate work site? All respondents employed before the pandemic summarized below, with those who said Zero/None at Q4 coded here as 0.			
	0	Zero	64%	
	1	One	7%	
	2	Two	7%	
	3	Three	6%	
	4	Four	4%	
	5	Five	9%	
	6	Six	1%	
	7	Seven	0%	
	99	Prefer not to answer	2%	
Q6	While working from home, do you occasionally leave the house to take midday trips – such as for going to a store, the post office, picking up kids, or going to get something to eat?			
	1	Yes	79%	*Ask Q7*
	2	No	19%	*Skip to Q11*
	98	Not sure	2%	*Skip to Q11*
	99	Prefer not to answer	0%	*Skip to Q11*

Q7	In a typical day when you are working from home, how many **different places** do you visit outside of your home during the day? *If says vary, ask to estimate.*		
	1	One	29%
	2	Two	38%
	3	Three	19%
	4	Four	9%
	5	Five	2%
	6	Six	2%
	7	Seven or more	1%
Q8	When you are working from home, what type of **transportation** do you typically use when taking midday trips? *If says drive, ask:* Do you typically drive alone or with others in the vehicle?		
	1	Drive **alone** (car, truck, SUV, or van)	82%
	2	Carpool (ride together 2 to 4 people)	2%
	3	Vanpool (ride together with 5 to 15 people)	0%
	4	Motorcycle/Moped	0%
	5	E-bike/electric scooter	2%
	6	On-demand rideshare service like Uber or Lyft	1%
	7	Taxi	0%
	Public Transit		
	8	Bus	2%
	9	Trolley	2%
	10	Coaster	0%
	11	Sprinter	0%
	12	Other public transit	0%
	13	Bicycle	2%
	14	Walk/jog/run	5%
	15	Other	1%
	99	Prefer not to answer	0%
Q9	In a typical day when you work from home, what would you say is the **total** number of miles you travel when making midday trips? Number of trips recorded and grouped into the categories shown below.		
	Less than 5		31%
	5 to 9		28%
	10 to 19		30%
	20 or more		12%
	Prefer not to answer		0%

Q10	We're interested in the **times of day** that you typically make trips when you work from home. Do you typically make trips: _____?				
	Read in Order		Yes	No	Prefer not to answer
A	In the morning, between 5AM and 9AM		41%	57%	2%
B	Midday, between 9AM and 1PM		72%	26%	2%
C	In the afternoon, between 1PM and 6PM		73%	25%	2%
Q11	Do you have the flexibility to *change* which days of the week you work from home, or do you have set days of the week that you work from home?				
	1	I can change which days of the week that I work from home	62%		
	2	I have set days of the week that I work from home	34%		
	98	Not sure	3%		
	99	Prefer not to answer	0%		
Ask Q12 if Q4=0. Otherwise skip to instruction preceding Q13.					
Q12	Does your employer currently give you the option to work from home at least one day per week? All respondents summarized below, with those who said they worked remotely at Q4 coded here as Yes.				
	1	Yes	45%		
	2	No	53%		
	98	Not sure	1%		
	99	Prefer not to answer	1%		
Ask Q13 if number days reported in Q4<Q3 OR Q5<Q4.					
Q13	When you commute to a work destination outside of your home, how do you typically commute to work? *If they say they use multiple transportation methods, ask:* Which do you use for the longest portion of your commute? *If they say **drive, car**, etc. ask:* Do you most often drive by yourself or with other people in the vehicle? *Single response only.*				
	1	Drive **alone** (car, truck, SUV, or van)	79%		
	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	1%		
	7	Taxi	1%		
	Public Transit				

	8	Bus	5%
	9	Trolley	2%
	10	Coaster	0%
	11	Sprinter	0%
	12	Other public transit	0%
	13	Bicycle	1%
	14	Walk/jog/run	3%
	15	Other	1%
	99	Prefer not to answer	0%

Section 5: Employment & Commute Changes				
Q14	Did you **change** employers during the past two years?			
	1	Yes	26%	*Ask Q15*
	2	No	73%	*Skip to Q16*
	99	Prefer not to answer	1%	*Skip to Q16*
Q15	What was the **main** reason why you changed employers? *Single response only.*			
	1	Better pay/salary	30%	
	2	Better benefits	3%	
	3	Flexible schedule	12%	
	4	Wanted to work from home more	2%	
	5	Change career	12%	
	6	Shorter commute	5%	
	7	Wanted to relocate to a **different** area	4%	
	8	Wanted to relocate to a more **affordable** area	2%	
	9	Layoffs or company went out of business	11%	
	10	Employer was mandating vaccine	2%	
	11	I wanted to work for employer who mandated vaccine	0%	
	12	Other	13%	
	99	Prefer not to answer	4%	

Q16	Prior to the pandemic, did you carpool or vanpool for your work commute at least two days per week?		
	1	Yes	17%
	2	No	81%
	98	Not sure	1%
	99	Prefer not to answer	1%
Ask Q17 if Q16=1 and Q13=(1 or 4-15).			
Q17	Is there a specific reason why you stopped carpooling or vanpooling for your work commute? *If yes, ask:* Please describe the reason. Verbatim responses recorded and later grouped into categories shown below.		
	Not sure, no specific reason		30%
	No carpool available, no one to go with		13%
	New car, now have own transportation		12%
	COVID, health concerns		10%
	New job, different coworkers, location		10%
	Safety concerns		7%
	Costly, high gas prices, inflation		5%
	Schedule change		4%
	Type of work, different stops		3%
	Prefer not to answer		3%
	No job, work		1%
	Work remotely		1%

Section 6: Remote Work Experience

Ask questions in this section if currently works from home at least one day per week (Q4>0).

Q18 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: _____? *If helped or hurt, ask:* Would you say it has (helped/hurt) a lot or somewhat?

	Randomize	Helped a lot	Helped somewhat	No Impact	Hurt somewhat	Hurt a lot	Not Sure	Prefer not to answer
A	Your satisfaction with your job	46%	23%	21%	7%	2%	0%	0%
B	Your ability to collaborate with other employees	18%	16%	35%	24%	4%	1%	1%
C	Your ability to communicate with other employees	22%	14%	37%	19%	4%	2%	1%
D	The quality of your work	34%	26%	32%	6%	2%	0%	0%
E	Your productivity	37%	29%	24%	7%	2%	0%	1%

F	Your ability to strike the right balance between work and your personal life	45%	23%	19%	8%	4%	0%	0%
G	Your expenses	40%	30%	20%	6%	2%	1%	1%
H	Your ability to manage your time	42%	28%	20%	6%	2%	1%	1%
I	Your ability to communicate with external customers or partners	24%	15%	46%	11%	2%	1%	1%

Q19	Because you are working from home, have you: _____?				
Randomize		Yes	No	Not Applicable	Prefer not to answer
A	Created a dedicated space in your home for an office or work space	71%	21%	7%	1%
B	Moved to a new house, or have plans to do so	22%	69%	8%	1%
C	Changed the hours of the day that you work	49%	46%	5%	1%
D	Reduced the number of vehicles in your household	17%	76%	6%	2%
E	Increased the number of hours you work	45%	49%	5%	1%
F	Experienced problems due to having a slower Internet connection at your home	31%	61%	6%	1%

Ask Q20 if Q19B=1. Otherwise skip to instruction preceding Q22.

Q20	You indicated that you moved your home or have plans to do so. Is your ***new*** home closer to your employer's main location, about the same distance, or is it further away?		
1	Closer to employer location	27%	*Skip to Q22*
2	About the same distance	38%	*Skip to Q22*
3	Further away from employer location	31%	*Ask Q21*
98	Not sure	4%	*Skip to Q22*
99	Prefer not to answer	1%	*Skip to Q22*

Q21	In what city is your new home located or close to?
	Verbatim answers for 22 respondents recorded and on file

Section 7: Change in Travel & Activities								
All respondents receive Q22.								
Q22	When compared to one year ago, are you _____ more often, about the same, or less often? *Get answer, then ask:* Would that be much (more/less) often or somewhat (more/less) often?							
	Randomize	Much more often	Somewhat more often	About the same	Somewhat less often	Much less often	Not Sure	Not Applicable
A	Shopping online and having packages delivered to your home	23%	24%	38%	6%	5%	0%	4%
B	Having food or groceries delivered to your home	13%	16%	24%	7%	9%	1%	28%
C	Driving to the grocery store	14%	16%	49%	12%	6%	1%	3%
D	Driving for work trips	11%	10%	36%	10%	9%	1%	24%
E	Driving for social events or activities	12%	15%	44%	14%	9%	1%	5%
F	Driving to parks, beaches, or other locations for recreation	13%	18%	43%	12%	7%	1%	6%
G	Driving for errands	13%	17%	50%	11%	4%	1%	4%
H	Driving kids to activities, events or school	11%	11%	26%	6%	4%	1%	42%

Section 8: Remote Work Expectations				
Next, let me ask you about the **future**, one year from now. If you aren't sure about an answer, please give me your best estimate.				
Q23	One year from now, how many days per week do you expect to work?			
	1	One	1%	
	2	Two	3%	
	3	Three	8%	
	4	Four	12%	
	5	Five	61%	
	6	Six	10%	
	7	Seven	3%	
	8	I plan to retire this year/I don't expect to be working one year from now	2%	*Skip to intro D1*

Q24	Of the <**insert from Q23**> work days per week, how many of these days do you expect to primarily work **from home** one year from now? All respondents summarized below, with those who said they plan not to work at Q23 coded here as 0.		
	0	Zero	54%
	1	One	8%
	2	Two	12%
	3	Three	8%
	4	Four	5%
	5	Five	10%
	6	Six	1%
	7	Seven	0%
	99	Prefer not to answer	2%
Ask Q25 if Q24>0.			
Q25	Of the <**insert from Q24**> days you will *primarily* work from home one year from now, how many days do you expect to work from home the **entire day** and not commute to a separate work site? All respondents summarized below, with those who said they plan not to work at Q23 or Zero/None at Q24 coded here as 0.		
	0	Zero	57%
	1	One	11%
	2	Two	10%
	3	Three	7%
	4	Four	4%
	5	Five	8%
	6	Six	1%
	7	Seven	0%
	99	Prefer not to answer	2%
Ask Q26 if Q24<Q4. Otherwise skip to instruction preceding Q28.			
Q26	You indicated that you expect to work *fewer* days from home one year from now when compared to your current schedule. Is this because you *prefer* to reduce the number of days you work from home?		
	1	Yes	44%
	2	No	49%
	99	Prefer not to answer	6%
Q27	One year from now, do you expect that your employer will *allow* you to continue working from home <**insert Q4**> days per week?		
	1	Yes	54%
	2	No	42%
	99	Prefer not to answer	4%
Ask Q28 if Q24=Q4. Otherwise skip to instruction preceding Q30.			

Q28	You indicated that you expect to work the *same* number of days from home one year from now as you do currently. Is this because you *prefer* to keep the number of days you work from home the same?			
	1	Yes	58%	
	2	No	38%	
	99	Prefer not to answer	4%	
Q29	Has your employer indicated that – one year from now – employees *must* work from home at least part of the time?			
	1	Yes	8%	
	2	No	91%	
	99	Prefer not to answer	1%	
	Ask Q30 if Q24>Q4. Otherwise skip to instruction preceding Q32.			
Q30	You indicated that you expect to work *more* days from home one year from now when compared to your current schedule. Is this because you *prefer* to increase the amount of days you work from home?			
	1	Yes	77%	
	2	No	20%	
	99	Prefer not to answer	3%	
Q31	Has your employer indicated that – one year from now – employees *must* work from home at least part of the time?			
	1	Yes	15%	
	2	No	82%	
	99	Prefer not to answer	3%	
	Ask Q32 of all respondents <u>except</u> if Q23=8.			
Q32	Do you anticipate that you will **change** employers in the next 12 months?			
	1	Yes	22%	*Ask Q33*
	2	No	75%	*Skip to D1*
	99	Prefer not to answer	4%	*Skip to D1*
Q33	What is the **main** reason why you expect to change employers?			
	1	Better pay/salary	43%	
	2	Better benefits	7%	
	3	Flexible schedule	8%	
	4	Want to work from home more	12%	
	5	Change career	11%	
	6	Shorter commute	2%	
	7	Want to relocate to a **different** area	8%	

	8	Want to relocate to a more **affordable** area	3%
	9	Layoffs or company is going out of business	3%
	10	Employer is mandating vaccine	0%
	11	I wanted to work for employer who mandates vaccine	0%
	12	Other	2%
	99	Prefer not to answer	1%

Section 9: Background & Demographics			
Thank you so much for your participation. I have just a few background questions for statistical purposes.			
D1	What **industry** do you currently work in? *If hesitates, ask:* What does your company do? Verbatim responses recorded and grouped into the NAICS codes and categories shown below.		
	11	Agriculture	<1%
	22	Utilities	2%
	23	Construction	3%
	31-33	Manufacturing	6%
	42	Wholesale Trade	1%
	44-45	Retail Trade	8%
	48-49	Transportation and Warehousing	4%
	51	Information	2%
	52	Finance and Insurance	3%
	53	Real Estate and Rental and Leasing	1%
	54	Professional, Scientific, and Technical Services	9%
	55	Management of Companies and Enterprises	3%
	56	Administrative and Support and Waste Management and Remediation Services	4%
	61	Educational Services	6%
	62	Health Care and Social Assistance	11%
	71	Arts, Entertainment, and Recreation	2%
	72	Accommodation and Food Services	12%
	81	Other Services (except Public Administration)	4%
	92	Public Administration	12%
		Prefer not to answer	8%

D2	What is your current **occupation**? *If hesitates, ask:* What type of work do you do? Verbatim responses recorded and grouped into the SOC codes and categories shown below.		
	11	Management Occupations	14%
	13	Business and Financial Operations Occupations	7%
	15	Computer and Mathematical Occupations	4%
	17	Architecture and Engineering Occupations	2%
	19	Life, Physical, and Social Science Occupations	1%
	21	Community and Social Service Occupations	1%
	23	Legal Occupations	2%
	25	Educational Instruction and Library Occupations	4%
	27	Arts, Design, Entertainment, Sports, and Media Occupations	4%
	29	Healthcare Practitioners and Technical Occupations	4%
	31	Healthcare Support Occupations	3%
	33	Protective Service Occupations	4%
	35	Food Preparation and Serving Related Occupations	6%
	37	Building and Grounds Cleaning and Maintenance Occupations	1%
	39	Personal Care and Service Occupations	3%
	41	Sales and Related Occupations	10%
	43	Office and Administrative Support Occupations	7%
	45	Farming, Fishing, and Forestry Occupations	<1%
	47	Construction and Extraction Occupations	2%
	49	Installation, Maintenance, and Repair Occupations	2%
	51	Production Occupations	3%
	53	Transportation and Material Moving Occupations	4%
	55	Military Specific Occupations	1%
		Prefer not to answer	11%

Ask D3 if SC1=3 OR SC2=3. Otherwise skip to D4.			
D3	Do you work as an independent contractor?		
	1	Yes	70%
	2	No	28%
	99	Prefer not to answer	2%
D4	Approximately how many employees work for your company?		
	1	1 to 4	10%
	2	5 to 9	6%
	3	10 to 24	9%
	4	25 to 49	9%
	5	50 to 99	9%
	6	100 to 249	9%
	7	250 or more	43%
	99	Prefer not to answer	5%
D5	In what year were you born? Year recorded and later grouped into categories shown below.		
	18 to 24		12%
	25 to 34		26%
	35 to 44		22%
	45 to 54		19%
	55 to 64		14%
	65 or older		5%
	Prefer not to answer		2%
D6	What is your gender?		
	1	Male	47%
	2	Female	51%
	3	Non-binary	<1%
	99	Prefer not to answer	2%

D7	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	80%
	2	Sometimes	12%
	3	Rarely	2%
	4	Never	4%
	99	Prefer not to answer	2%
D8	What ethnic group do you consider yourself a part of or feel closest to*? Read list if respondent hesitates*		
	1	Caucasian/White	46%
	2	Latino/Hispanic	32%
	3	African-American/Black	6%
	4	American Indian or Alaskan Native	<1%
	5	**Asian** -- Korean, Japanese, Chinese, Vietnamese, Filipino or other Asian	12%
	6	Pacific Islander	1%
	7	Middle Eastern	1%
	8	Mixed Heritage	1%
	98	Other	<1%
	99	Prefer not to answer	1%
D9	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	8%
	2	$25,000 to less than $50,000	17%
	3	$50,000 to less than $75,000	17%
	4	$75,000 to less than $100,000	14%
	5	$100,000 to less than $150,000	16%
	6	$150,000 or more	18%
	98	Not sure	1%
	99	Prefer not to answer	9%

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

Post-Interview & Sample Items			
S1	San Diego County Subregion		
	Central		20%
	East County		16%
	North City		26%
	North County East		3%
	North County West		23%
	South County		13%
S2	Survey Language		
	1	English	92%
	2	Spanish	8%