

During the COVID-19 pandemic, businesses across the San Diego region, as well as nationally, who were able to create remote work¹ opportunities for at least some of their employees did so to an extent previously not seen. Because around one in every five trips around the region are individuals traveling to or from work,² understanding where we are with telecommuting post-pandemic is an important input into the transportation models that SANDAG builds to understand the impact of policies, programs, and other initiatives on how we travel around the region.

In 2023, SANDAG partnered with True North Research³ to conduct a follow-up survey of businesses and employees in the San Diego region to better understand their current remote work policies and practices. This InfoBits report is a summary of key results from the full report, which is being used as part of long-term regional planning efforts, including the development of the 2025 Regional Plan.



Did you know?



Almost 3 in 5 (57%) San Diego County businesses offer remote work to at least some of its employees in 2023, up from 47% in 2021.



Only around one in ten (12%) employees say they work remotely 100% of the time.



Employees with higher household incomes are two times more likely to be able to remote work, compared to those with the lowest household incomes.

How have businesses evolved since beginning to offer remote work?

Remote work has evolved since COVID-19 stay-at-home orders were issued. In both the 2021 and 2023 surveys, businesses were asked to describe the effect of telework on their employees and businesses, and those surveyed in 2023 were more positive than those surveyed two years earlier (Figure 1). In addition, 46% of those surveyed in 2023 said their experience with employees working from home now was “better” than it was during the pandemic.

Who was Surveyed in 2023?

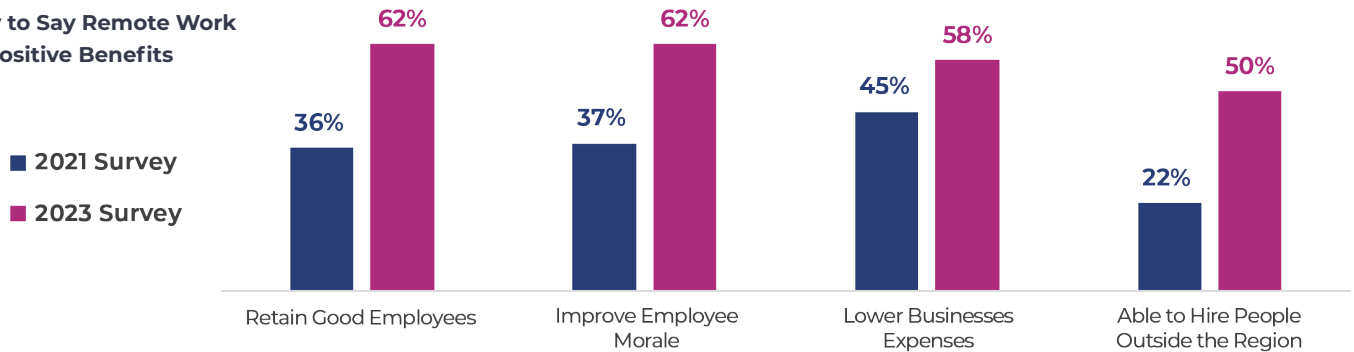
- **627 businesses** using a random stratified design that considered business size, location, and industry
- **1,100 employees** that were weighted to match the region's distribution of employees by age, industry, and subregion

¹ For the purpose of this report, the terms “remote work” and “telecommuting” are used interchangeably.

² San Diego County Transportation Study 2022: Wave 1 (2022) Technical Memorandum.

³ The first telework survey was conducted in 2021 and the previous InfoBits report is available [here](#). It should be noted that while it is possible a business or individual participated in both surveys, intentional inclusion in both survey samples was not part of the sampling methodology.

Figure 1: Businesses More Likely to Say Remote Work Has Positive Benefits



How common is teleworking today, compared to the past?

Businesses are more likely to offer remote work today than they were before the pandemic and also more likely to offer it to a greater percentage of their employees. As Figure 2 shows, pre-pandemic, only around one in every four (27%) businesses offered remote work (defined as at least one day per week) to at least some of their employees. This increased to around one in every two (47%) during the pandemic and almost three in five (57%) in 2023. In addition, of those businesses that offer remote work, the percent of employees it is offered to increased from around two-thirds (64%) pre-pandemic to almost three-fourths (72%) in 2023.

Telework opportunities varied across businesses in the San Diego region by the size of the business based on the number of employees at a given location. In the San Diego region, the majority of businesses are small, with around two in three (63%) having less than five employees and these businesses are less likely to offer remote work (58%), but they offered it to a greater percentage of their workforce on average (82%). In comparison, 73% of larger businesses (i.e., with 50 employees and greater) offer remote work, but they offer it to only 48% of their employees, on average.

Are most employees who telework doing so 100% of the time?

No. More than four in five (83%) of businesses surveyed in 2023 who offer remote work said that none of their employees are 100% remote, but rather work some type of hybrid schedule. In addition, only around one in ten (12%) of employees surveyed in 2023 reported they work 100% from home. In 2023, businesses were more than twice as likely to say employees who work remote have flexibility to choose which days they do so (37%), than those that said they have set days their employees work from home (15%).

Figure 2: More Businesses Offering Remote Work and to More Employees

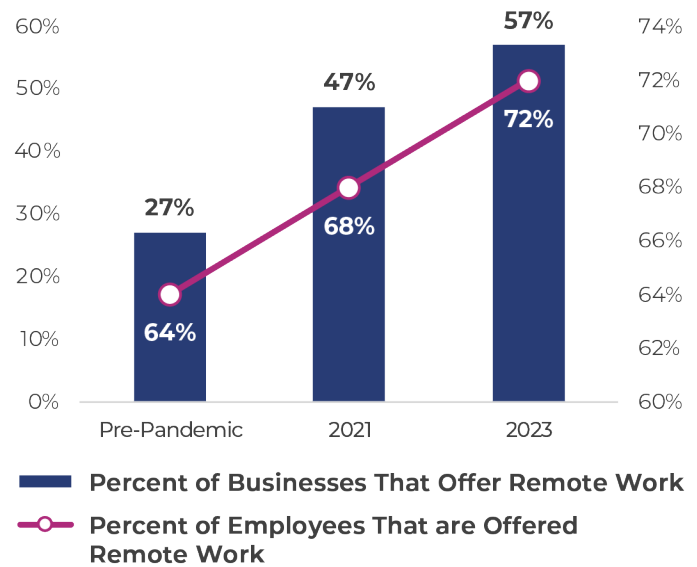
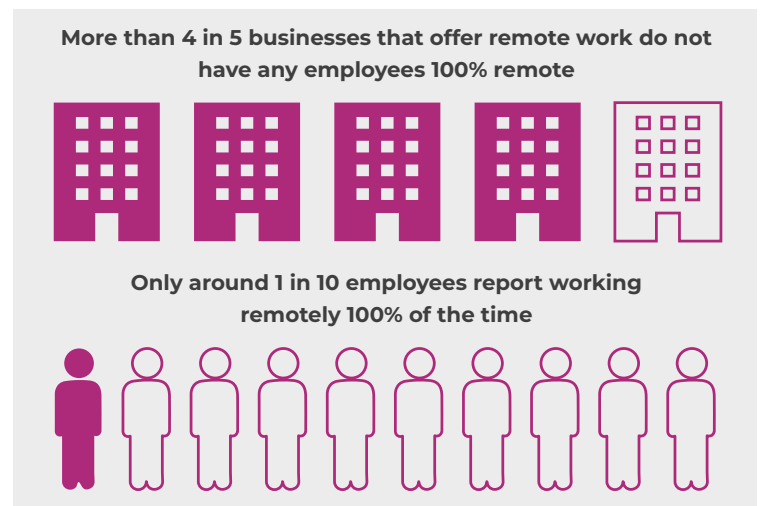


Figure 3: Telework More Likely to Now be Hybrid Rather Than 100%



Can all employees work remotely?

Employees who were surveyed in 2021 were more likely to report having the option to work remotely (54%), compared to prior to the pandemic (25%), but this percentage decreased in 2023 (39%) (Figure 4). However, it is important to note that not all employees are able to work remotely due to the nature of their work that requires being on-site.⁴ Specifically, an analysis of these data suggests that 35% of jobs in the San Diego region have the potential to be teleworkable. In addition, as Figure 5 shows, data from the employee survey shows that individuals who are younger, report an annual household income between \$24,000 and \$49,999, and who describe themselves as Hispanic/Latina/Latino or Black/African-American were least able to remote work in 2023, compared to those who were 45 to 54, reported household incomes of \$150,000 or more, and who described themselves as White or Asian (Figure 5).

Figure 4: Percent of Employees Who Report Being Able to Work Remote is Higher Than Pre-Pandemic, But Lower Than in 2021

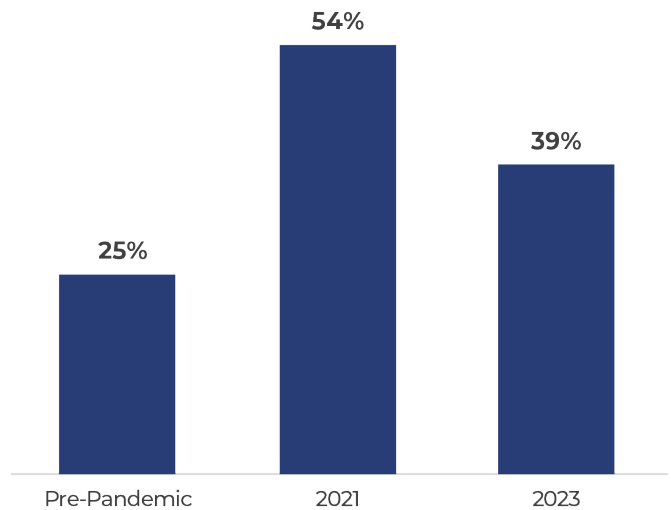


Figure 5

Most Likely to Be Able to Remote Work:

- » 45 to 54 years old (42%)
- » Household income \$150k or higher (56%)
- » White (44%)
- » Asian (44%)

Least Likely to Be Able to Remote Work:

- » 18 to 24 year old (27%)
- » Household income \$24k-\$49k (22%)
- » Hispanic (31%)
- » Black (32%)

Additional analyses of these telework survey data combined with data from SANDAG's analysis of employment centers⁵ also revealed variation in the percent of employees in the region who are able to work remotely at least one day per week across the region and major employment centers, as well as by industry. As Table 1 shows, the ability to work remotely was more likely in the Sorrento Valley West Employment Center and less likely in the Kearny Mesa West Employment Center. Similarly, the percent of employees that could work remotely in Coronado and Solana Beach was much higher than in Lemon Grove and Escondido. These differences can be explained by the types of jobs in these employment centers and jurisdictions. Specifically, areas with jobs that can more easily accommodate remote work, such as Finance and Insurance and Professional, Scientific, and Technology Services, may have different employee commute patterns now than in the past, while those that have a greater number of employees in industries that are less likely to support remote work (such as Retail and Accommodations and Food Service) may have more similar commute patterns for its employees.

Table 1

	Remote Work More Likely	Remote Work Less Likely
Tier 1 Employment Center	Sorrento Valley West (40%)	Kearny Mesa West (23%)
Jurisdictions	<ul style="list-style-type: none"> • Coronado (40%) • Solana Beach (32%) 	<ul style="list-style-type: none"> • Lemon Grove (23%) • Escondido (24%)
Industry Types	<ul style="list-style-type: none"> • Finance and Insurance (74%) • Professional, Scientific, and Technology (57%) 	<ul style="list-style-type: none"> • Retail (20%) • Accommodations and Food (21%)

⁴ Over two-thirds (69%) of the businesses surveyed reported not offering remote work to all or some of their employees because employees had to be physically on-site to do their jobs.

⁵ Employment Centers represent places in the San Diego region with high density of businesses/employees. Employment Centers 1.0 was completed as part of the 2021 Regional Plan process and Employment Centers 2.0 is currently being finalized as part of the 2025 Regional Plan. More information about Employment Centers can be found on the [SANDAG Open Data Portal](#).

How did the pandemic affect businesses hiring employees outside the region?

The increase in remote work affected the composition of the San Diego region’s workforce, with additional individuals who work here living outside the County. As Figure 6 shows, the increase in remote work also had other effects, including the ability of some businesses (especially larger ones) to attract and retain qualified employees.

What do we know about other trips employees make around the region?

Because the majority of trips around the region are not people traveling to or from their place of employment, when we consider the transportation needs of our region today and in the future, it is important to examine both how people get to work and how other trips they may take increase the number of vehicle miles traveled (VMT). As Figure 7 shows, individuals who reported teleworking were more likely than those who did not telework to drive to work alone in a vehicle when they did go to their place of employment. In addition, four in five reported making mid-day trips that averaged 9.4 miles per day, and all the employees surveyed said that compared to one year ago, they were making more discretionary and mandatory trips (associated with errands, children, and other appointments), as well as utilizing online delivery services that result in additional miles being driven.

Takeaways

- » Remote work is more common than it once was, but the percentage of employees teleworking 100% of the time has declined since the pandemic.
- » The days people telecommute can vary, suggesting variable travel at highway hot spots around the region.
- » Larger businesses are less likely to be able to offer remote work to all of their employees, supporting the need to continue to focus on offering effective transportation alternatives to our region’s employment centers.
- » Not everyone is able to work remotely, and ensuring transportation options for everyone who has to commute to work is essential.
- » Individuals who work remotely still make single-occupancy trips during the workday to other locations, so this impact on VMT is important to remember.

About SANDAG infobits

SANDAG serves as the region’s clearinghouse for information and data. InfoBits publish timely, relevant information informing the public while providing context on complex issues facing the region.

Figure 6

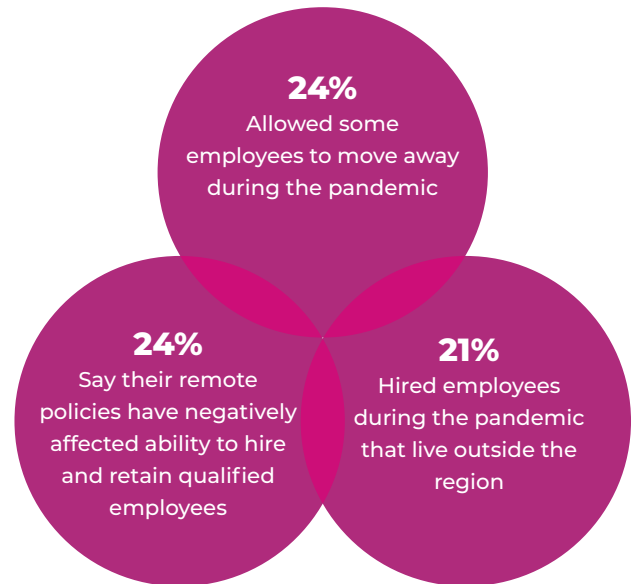


Figure 7



Free Language Assistance | Ayuda gratuita con el idioma | Libreng Tulong sa Wika | Hỗ trợ ngôn ngữ miễn phí
 免費語言協助 | 免費語言協助 | مساعدة ترجمة مجانية | 무료 언어 지원 | کمک زبان رایگان | 無料の言語支援 | Бесплатная языковая помощь
 Assistência linguística gratuita | मुफ्त भाषा सहायता | Assistance linguistique gratuite | ជំនួយភាសាឥតគិតថ្លៃ
 ఉచిత భాషా సహాయం | ການຊ່ວຍເຫຼືອດ້ານພາສາພຣີ | Kaalmada Luqadda ee Bilaashka ah | Безкоштовна мовна допомога



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