

REMOTE WORK POLICIES & PRACTICES
SURVEYS OF BUSINESSES AND EMPLOYEES IN
THE SAN DIEGO REGION

SUMMARY REPORT PREPARED FOR
SANDAG



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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.

The public health and economic impacts of the coronavirus are likely to be felt well into the future. What is less clear is how the experiences of the past year may also have lasting effects on business practices and working arrangements that are 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. To effectively plan for the future, it is of particular interest how businesses intend to operate once the pandemic recedes, whether employees who are given the option to continue remote working will do so, and the degree to which remote work practices established during the past year may (or may not) endure.

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 post-pandemic period. The **Business Survey** explored how businesses responded to the pandemic with respect to their remote work policies and practices, the perceived impacts of remote working on various aspects of their business, as well as their expectations for the post-pandemic period and beyond. The **Employee Survey** 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 expect and/or prefer to continue working from home once the pandemic subsides. The latter survey also profiled the changes employees have made to their living arrangements in response to working from home, the types of trips they are making, and how remote work appears to shape trip generation.

OVERVIEW OF METHODOLOGY A full description of the methodology used for this study is included later in this report (see *Methodology* on page 99). For the Business Survey, a total of 577 businesses in the San Diego region participated in the survey between February 17, and March 11, 2021. 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

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.

San Diego County, then screened to confirm they were currently employed. A total of 1,006 employees completed the survey between February 23, and March 19, 2021, and the final sample was weighted to match employee distribution by age, industry, and subregion. Both surveys followed a mixed-method design that employed multiple recruiting methods (email 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*). And for the truly ambitious reader, a detailed description of the study methodology appears near the back of the report (see *Methodology* on page 99), as do the questionnaires used for the respective surveys (see *Questionnaires & Toplines* on page 105).

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.

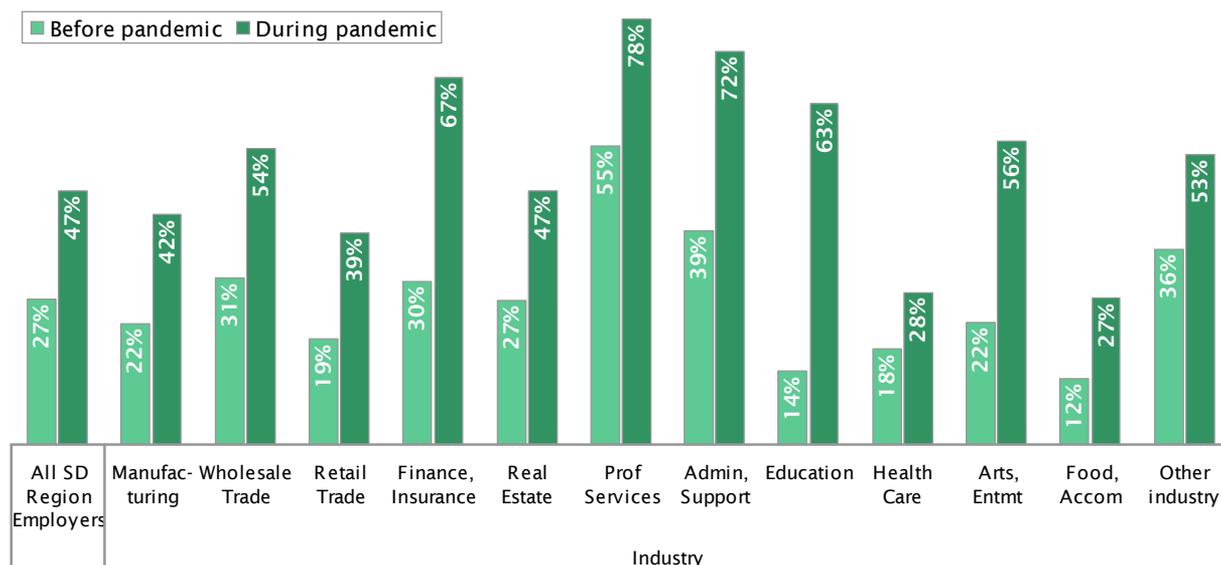
ABOUT TRUE NORTH True North is a full-service survey research firm that is dedicated to providing public agencies with a clear understanding of the values, opinions, priorities and behaviors of their residents and customers. Through designing and implementing scientific surveys, as well as expert interpretation 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 1,000 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 post-pandemic period. 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 one year into the pandemic indicated that they provide this option to employees (see Figure 1).

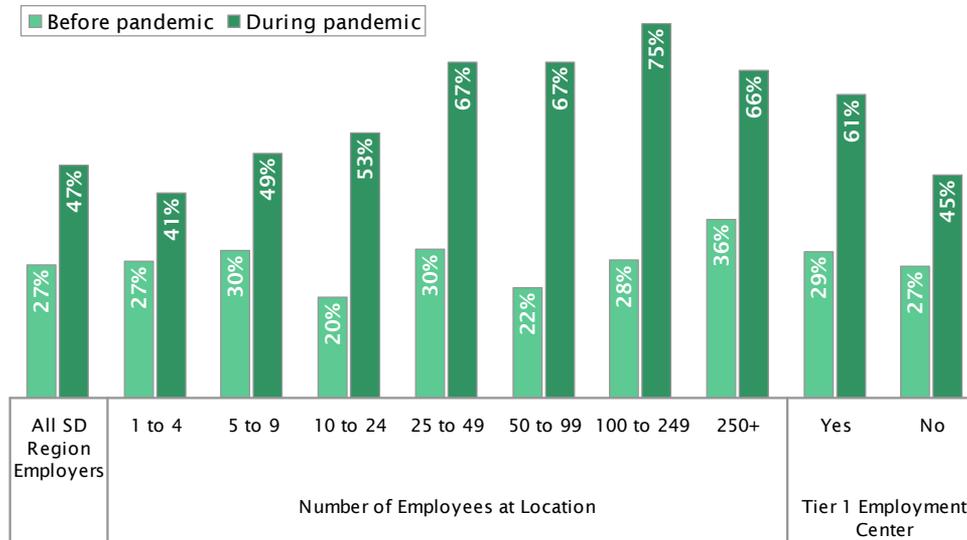
FIGURE 1 BUSINESS SURVEY: PERCENTAGE OF BUSINESSES THAT OFFERED A REMOTE WORK OPTION TO SOME EMPLOYEES, OVERALL AND BY INDUSTRY



Although the percentage of businesses that allowed employees to work from home increased in all industries, company size categories, and locations in the region, the *magnitude* of the shift varied (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, the percentage of businesses allowing employees to work from home doubled, tripled, or even quadrupled in other industries or size categories. When compared to their pre-pandemic patterns, businesses in the education, arts/entertainment, and finance/insurance industries, those with 25 to 249 employees at their location, and businesses located in one of the region's Tier 1 Employment Centers² made the largest shifts in their remote work offerings.

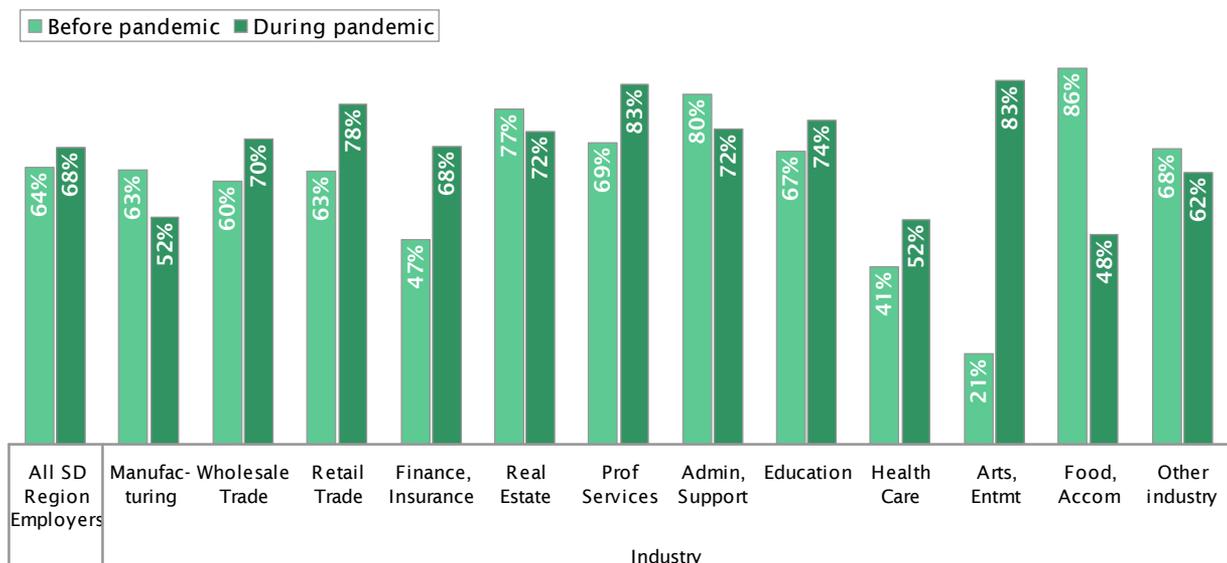
2. Tier 1 Employment Centers are areas with high densities of employment (at least 75,000 employees). There are three Tier 1 Employment Centers in the region (Downtown San Diego, Sorrento Valley, and Kearny Mesa).

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



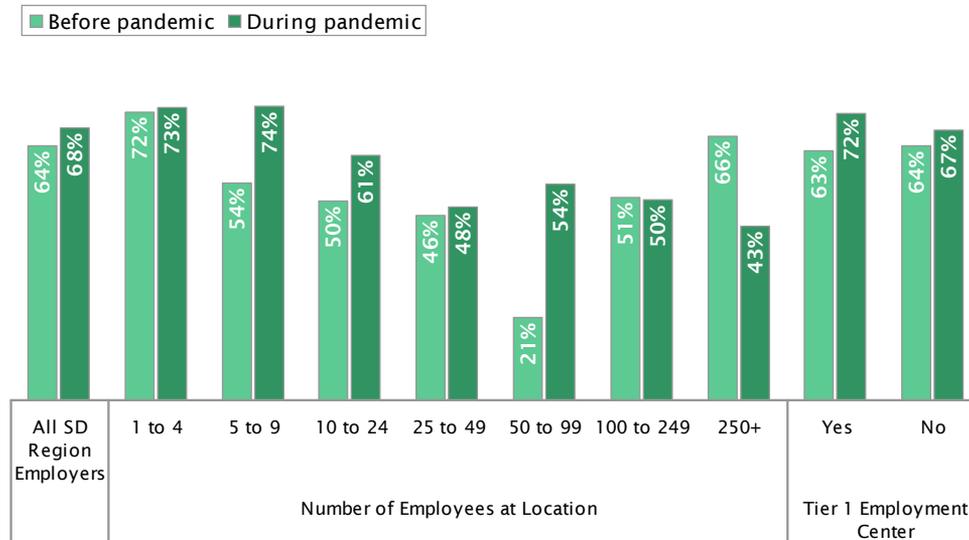
In addition to more businesses allowing employees to work from home, businesses also had the opportunity to expand their remote work offer to a larger percentage of their workforce. The results of this study indicate that this type of change accounted for just a small percentage of the net increase in remote work opportunities in the region. 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). Although 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%.

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



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.³

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



The dramatic shift in remote work policies 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.⁴ 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).

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 (see Figures 7 & 8). Prior to the pandemic, the *average* employee in the San Diego region worked from home 0.8 days per week.⁵ One year into the pandemic, that figure had grown to 2.2 days per week.

3. 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.
4. 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.
5. This average factors in all employees, including those who did not work from home.

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

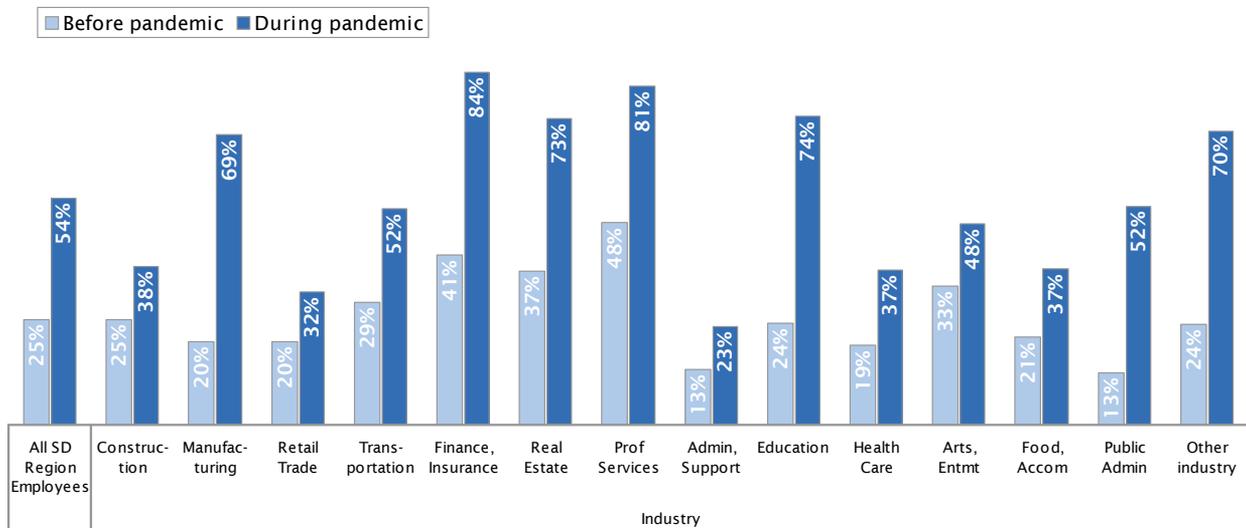
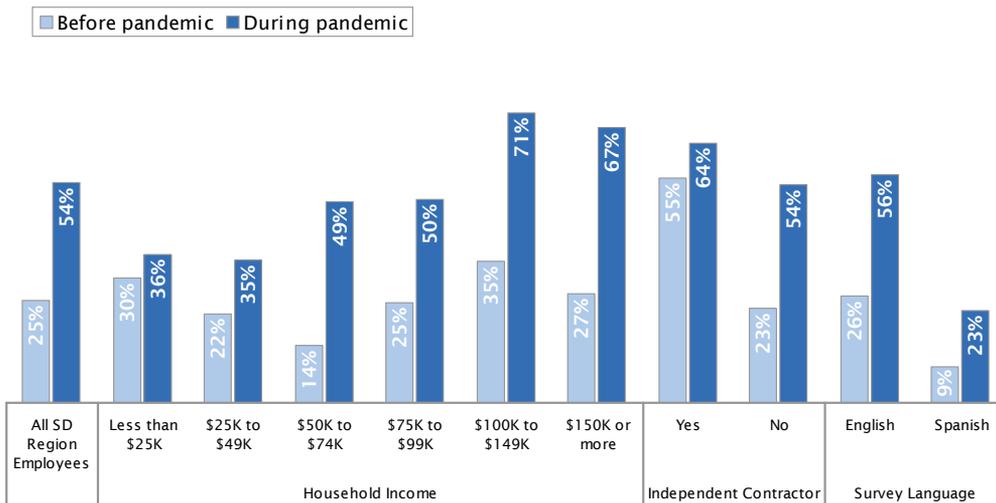


FIGURE 6 EMPLOYEE SURVEY: PERCENTAGE OF EMPLOYEES REMOTE WORKING 1+ DAYS PER WEEK, OVERALL AND BY HOUSEHOLD INCOME, INDEPENDENT CONTRACTOR STATUS, AND SURVEY LANGUAGE



Here again, the study revealed that the shift to a remote work model was quite uneven across industries and employee 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).

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

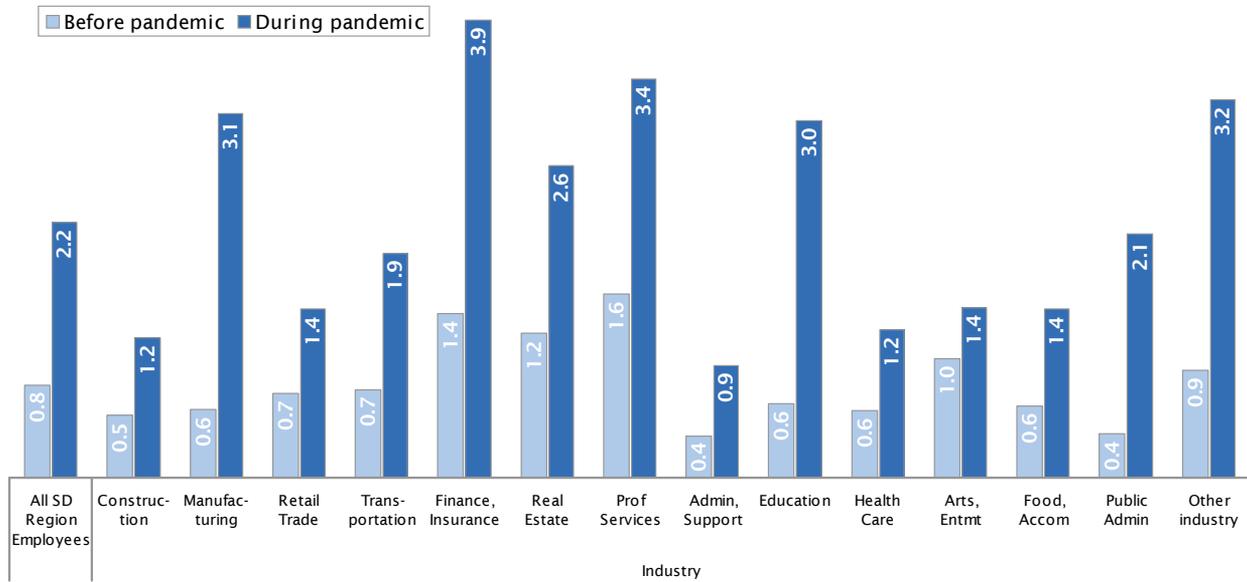
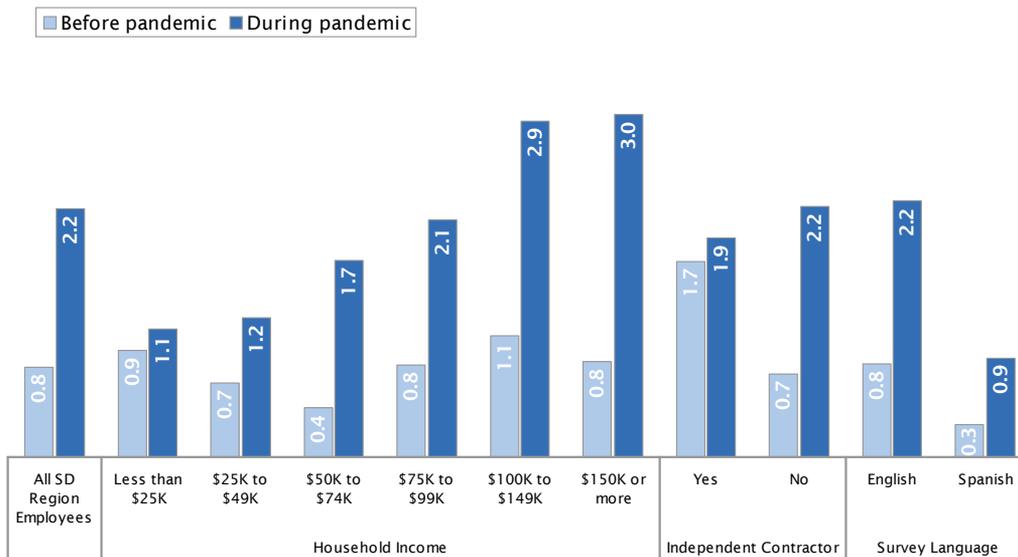
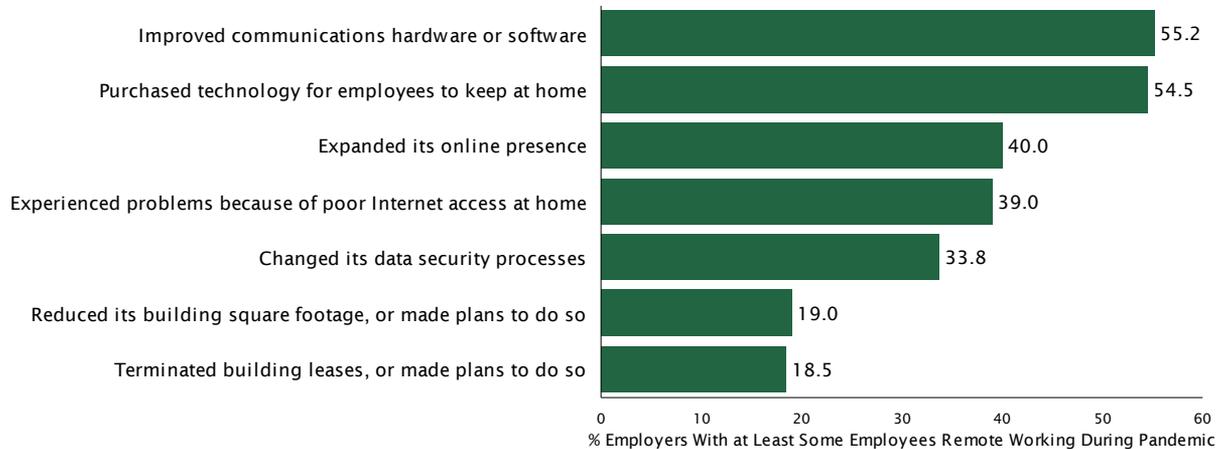


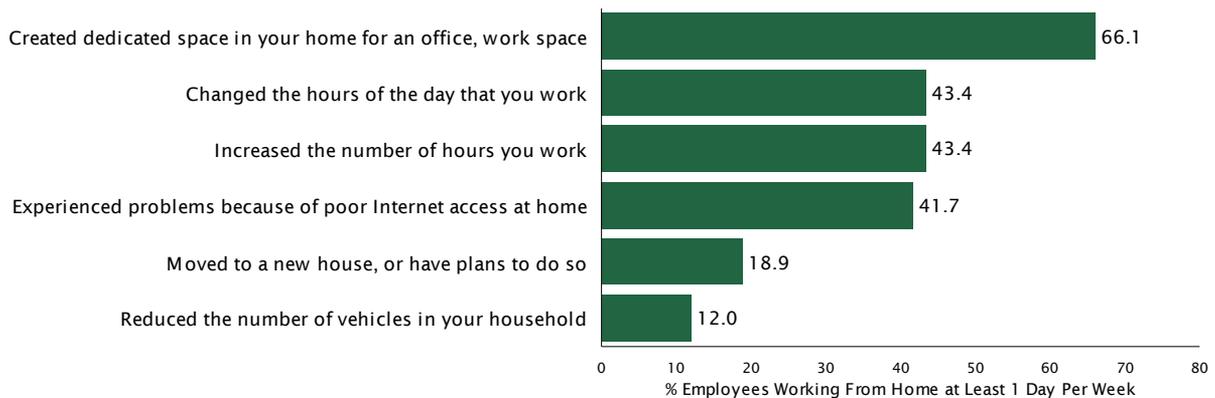
FIGURE 8 EMPLOYEE SURVEY: AVERAGE DAYS PER WEEK REMOTE WORKING PRIMARILY, OVERALL AND BY HOUSEHOLD INCOME, INDEPENDENT CONTRACTOR STATUS, AND SURVEY LANGUAGE



What changes have businesses and employees made to accommodate remote work? The shift to a remote work model required significant investments and adjustments of both businesses and employees. To accommodate more employees working from home, more than half of businesses surveyed 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, 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.

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

The patterns of adjustment and investment were 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, 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 have employees. Approximately one-in-five employees moved to a new house or have plans to do so in response to working more from home, whereas approximately one-in-ten reduced the number of vehicles their household owns.

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

What are the pros and cons of remote work? The answer to this question depends on who you ask. 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 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 productive⁶ and less profitable with employees working from home, while just 9% felt more productive and 20% more profitable. Businesses were also evenly divided on the impacts of remote work on employee morale with 38% finding it to be hurtful and 37% helpful.

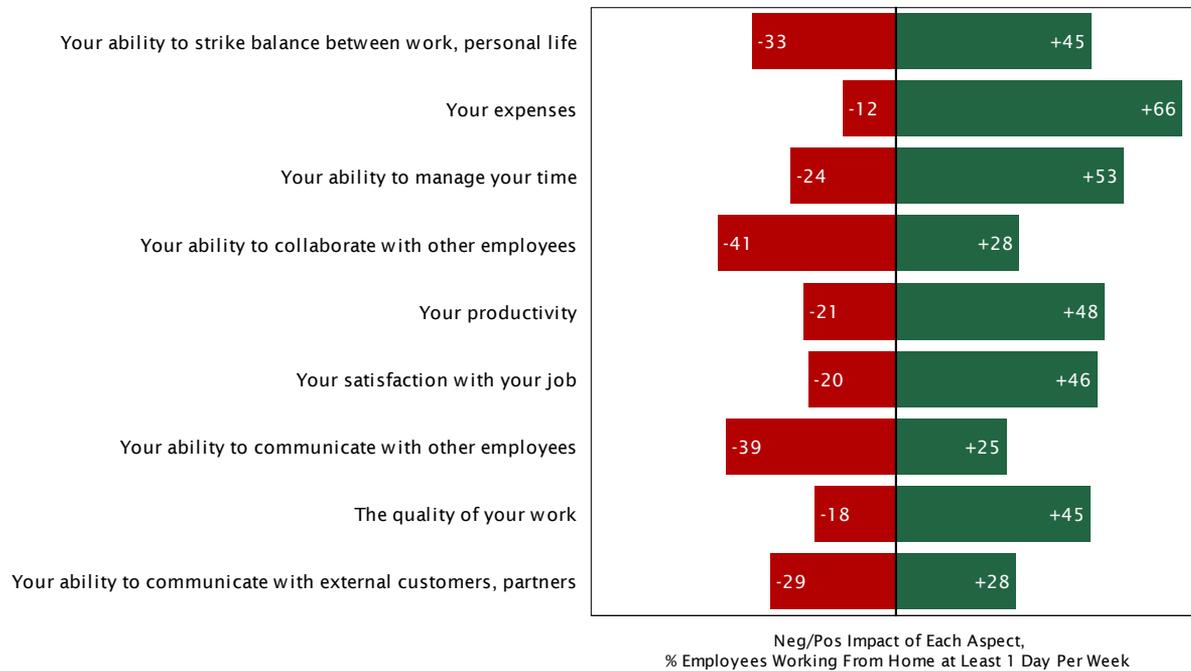
FIGURE 11 BUSINESS SURVEY: PERCENTAGE OF BUSINESSES CITING HURTFUL/HELPFUL IMPACTS OF EMPLOYEES WORKING FROM HOME



In contrast to businesses, employees were more apt to find that remote work helps many aspects of their performance and work environment (see 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 see eye-to-eye are the impacts of working from home on employees' abilities to *communicate* and *collaborate* with other employees and across the organization. Both view these as the biggest challenges associated with a remote work model.

6. 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 34).

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



To what extent do businesses and employees anticipate continuing remote work arrangements once the pandemic is over? To effectively plan for the future, SANDAG has a particular interest in how businesses intend to operate once the pandemic recedes, whether employees who are given the option to continue remote working will do so, and the degree to which remote work practices established during the past year may (or may not) endure. Accordingly, businesses and employees were asked to cast their gaze to the future—when the pandemic is over—and relay their expectations with respect to their remote work policies and practices.

As the pandemic ebbs, so too does the percentage of businesses that anticipate they will continue to offer remote work to one or more employees in their organization. Whereas 47% of businesses during the pandemic provided a remote work option to employees, 40% forecast they will do so once the pandemic is over (see Figure 13). A retraction in remote work offerings was anticipated among business in *all* industries, size categories, and locations, but was certainly more pronounced in select industries (manufacturing, real estate, administrative and support services, and education) and among businesses with 50 to 249 employees at their location.

Although some businesses in the San Diego region anticipate disallowing remote work once the pandemic is over, the percentage that anticipate continuing to offer a remote work option (40%) is higher than the pre-pandemic level (27%). Businesses in finance and insurance, professional services, and arts and entertainment, those with 25 to 49 or 250+ employees at their location, and businesses located in a Tier 1 Employment Center are particularly notable for the growth in remote work offerings during the pandemic *and* their expected resilience post-pandemic (see Figures 13 & 14).

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

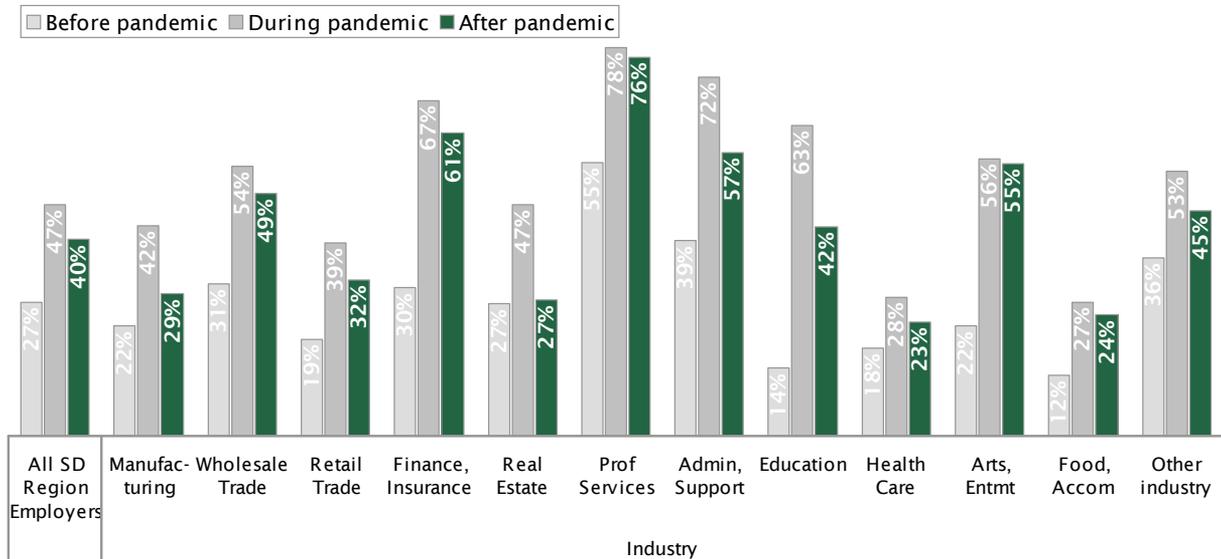
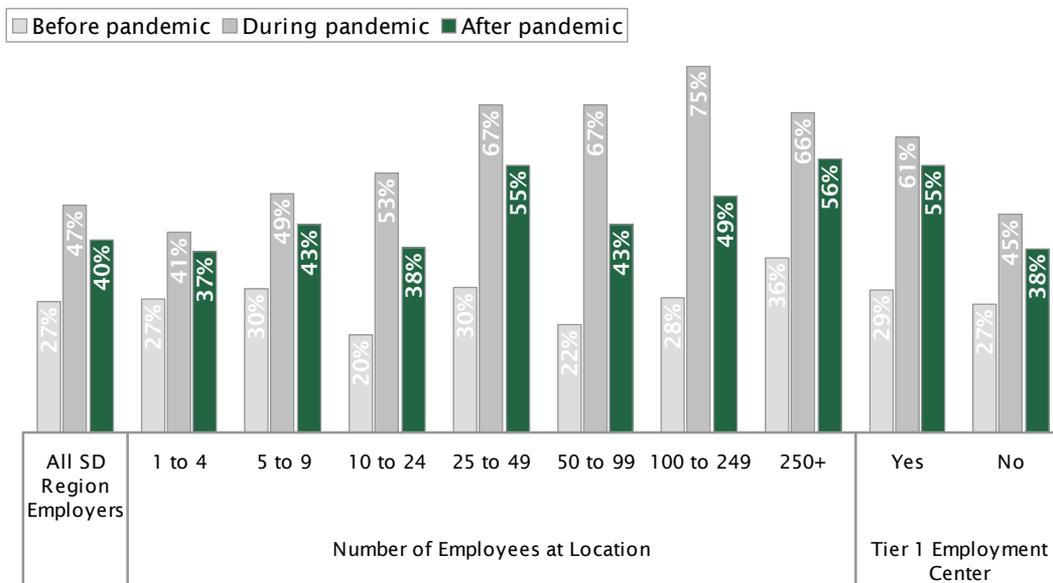


FIGURE 14 BUSINESS SURVEY: PERCENTAGE OF BUSINESSES THAT EXPECT TO OFFER REMOTE WORK OPTION TO SOME EMPLOYEES POST-PANDEMIC, OVERALL AND BY NUMBER OF EMPLOYEES AT LOCATION AND TIER 1 EMPLOYMENT CENTER



Among businesses in the San Diego region that offered a remote work option to their employees, the average percentage of their workforce that had the option to work from home at least one day per week differed little between the pre-pandemic (64%) and pandemic periods (68%). Likewise, the percentage of their workforce that businesses anticipate will have the option to work from home post-pandemic (61%) is reasonably similar to pre-pandemic and pandemic levels (see Figures 15 & 16). There are notable exceptions to this pattern within certain industries (manufacturing, education, and food and accommodations) and among large

employers that anticipate the percentage of their workforce with a remote work option will be substantially *lower* than prior to the pandemic.⁷

FIGURE 15 BUSINESS SURVEY: AVERAGE PERCENTAGE OF WORKFORCE TO RECEIVE REMOTE WORK OPTION POST-PANDEMIC, OVERALL AND BY INDUSTRY

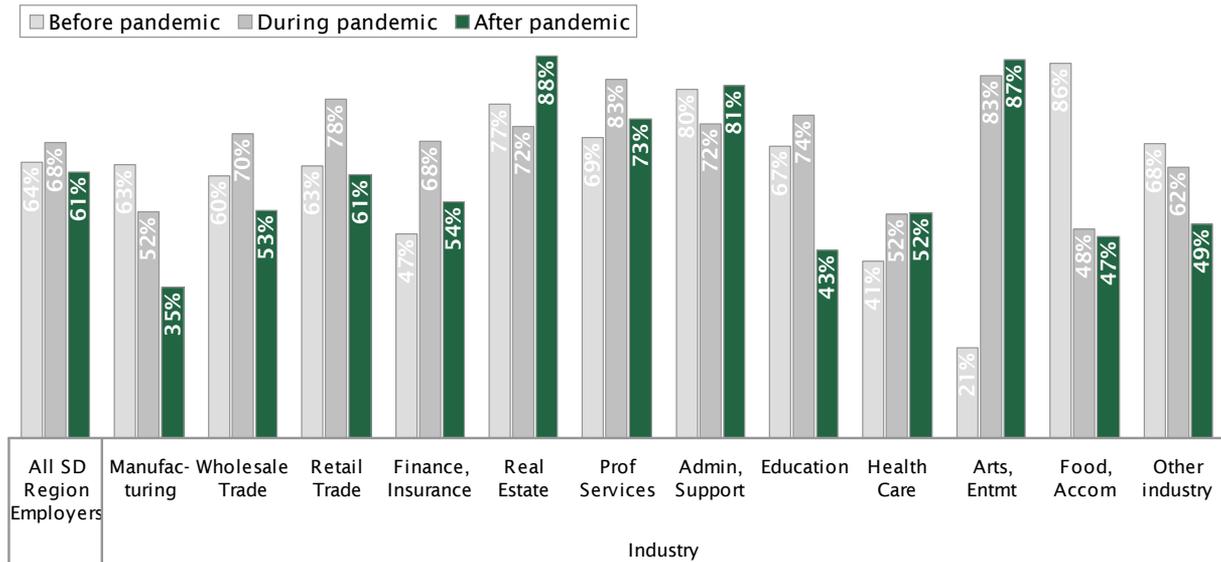
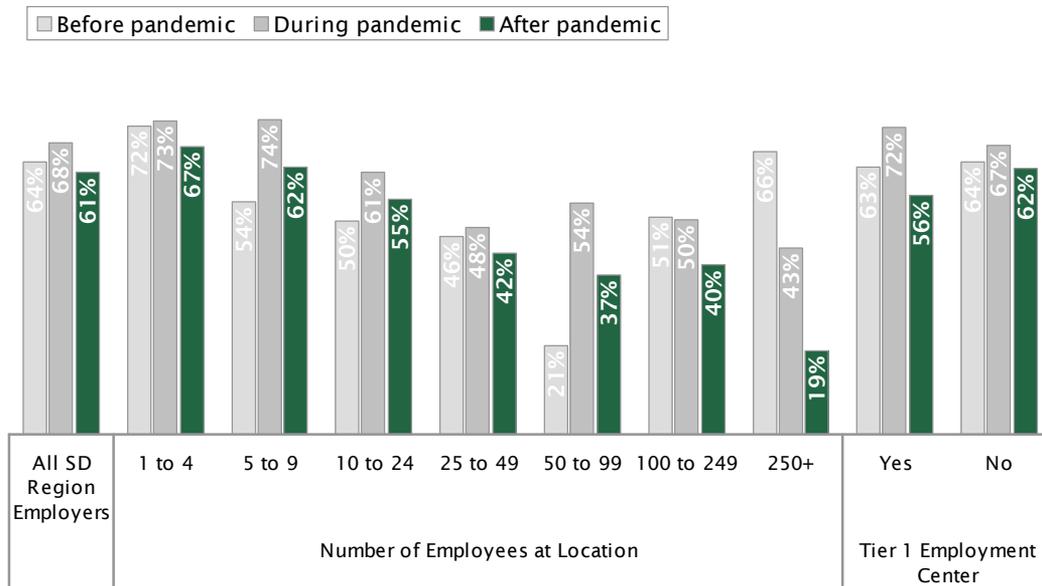


FIGURE 16 BUSINESS SURVEY: AVERAGE PERCENTAGE OF WORKFORCE TO RECEIVE REMOTE WORK OPTION POST-PANDEMIC, OVERALL AND BY NUMBER OF EMPLOYEES AT LOCATION AND TIER 1 EMPLOYMENT CENTER



7. Note that some of these industries have relatively small sample sizes, which can contribute to more dramatic fluctuations based on the responses of a few participants.

Employees' expectations for their remote work futures parallel those of businesses in many respects. The percentage of employees who anticipated they would work from home at least one day per week once the pandemic is over checked-in at 44%, which is lower than the current pandemic level of 54%, but higher than the 25% reported pre-pandemic (see Figures 17 & 18). The largest declines in the percentage of employees expecting to work from home at least once per week were found in manufacturing and education, which is consistent with the patterns found in the Business Survey. Post-pandemic, employees in finance and insurance, real estate, professional services, and other industries, those living in high-income households, independent contractors, and those who preferred to complete the survey in English were more likely than their respective counterparts to anticipate working from home at least one day per week.

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

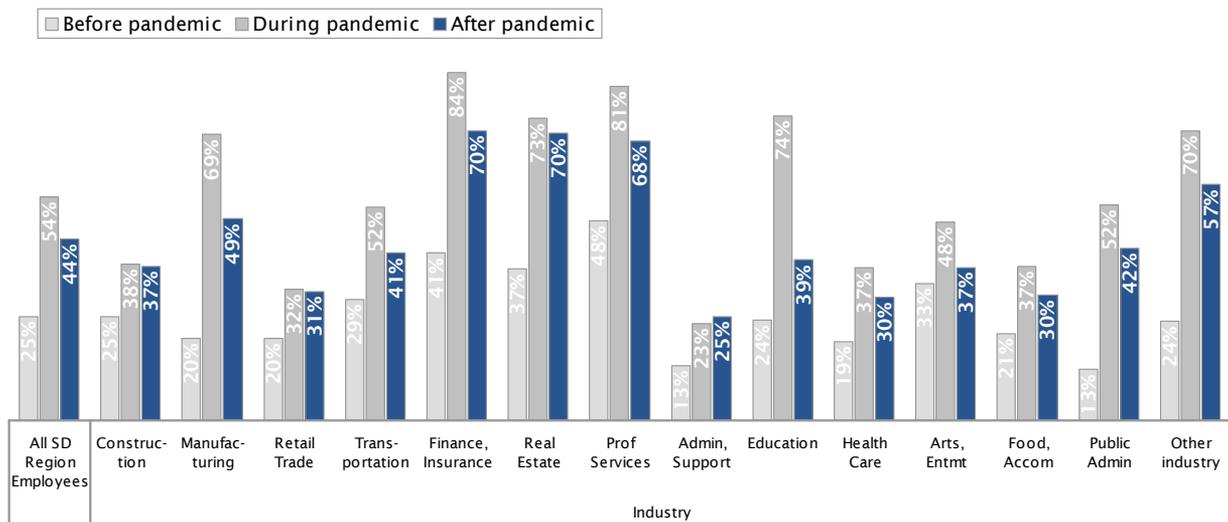
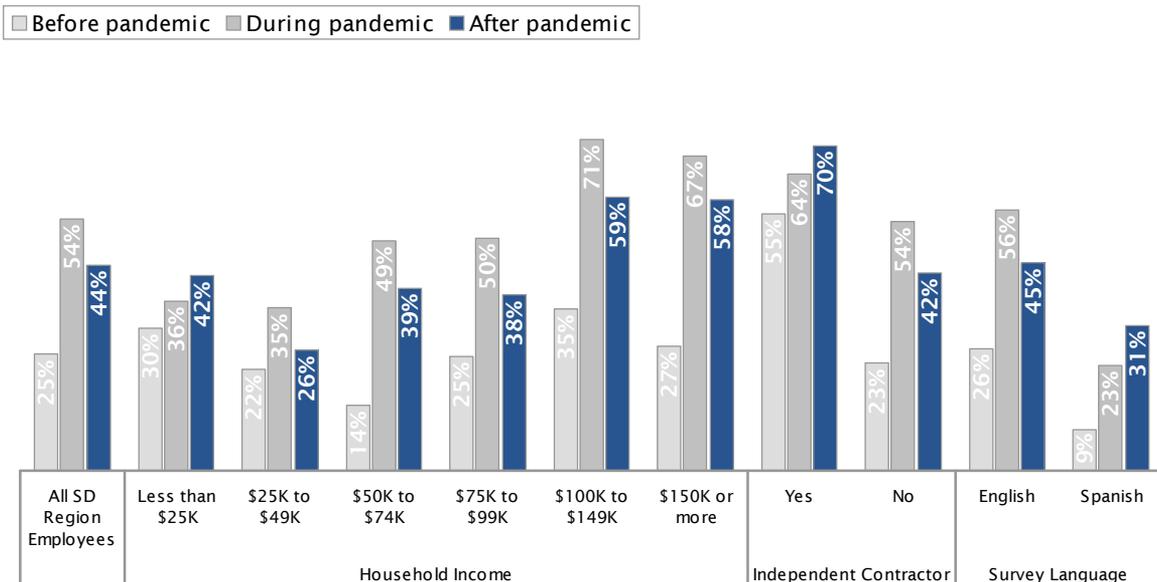


FIGURE 18 EMPLOYEE SURVEY: PERCENTAGE OF EMPLOYEES WHO ANTICIPATE REMOTE WORKING 1+ DAYS PER WEEK POST-PANDEMIC, OVERALL AND BY HOUSEHOLD INCOME, INDEPENDENT CONTRACTOR STATUS, AND SURVEY LANGUAGE



Although the percentage of employees who anticipated working from home at least once per week after the pandemic declined modestly from pandemic levels (see Figures 17 & 18), the decline in the average number of days they anticipated working from home was steeper (see Figures 19 & 20). Among all employees who live in the San Diego region, the average they anticipated working from home once the pandemic recedes was 1.4 days, down from the current amount of 2.2 days. When compared to their current pandemic patterns, employees in manufacturing, education, finance and insurance, professional services, and other industries reported the greatest anticipated reduction in remote work days, as did those living in households earning at least \$75,000 annually, those who are not independent contractors, and respondents who preferred to take the survey in English.

FIGURE 19 EMPLOYEE SURVEY: AVERAGE DAYS PER WEEK EXPECT TO PRIMARILY REMOTE WORK POST-PANDEMIC, OVERALL AND BY INDUSTRY

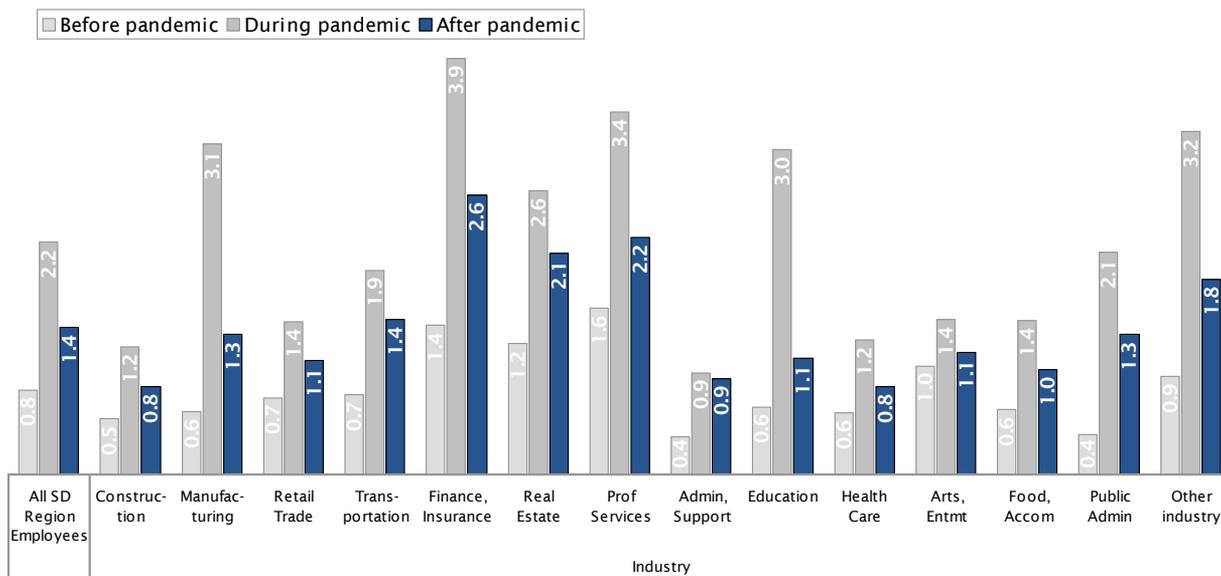
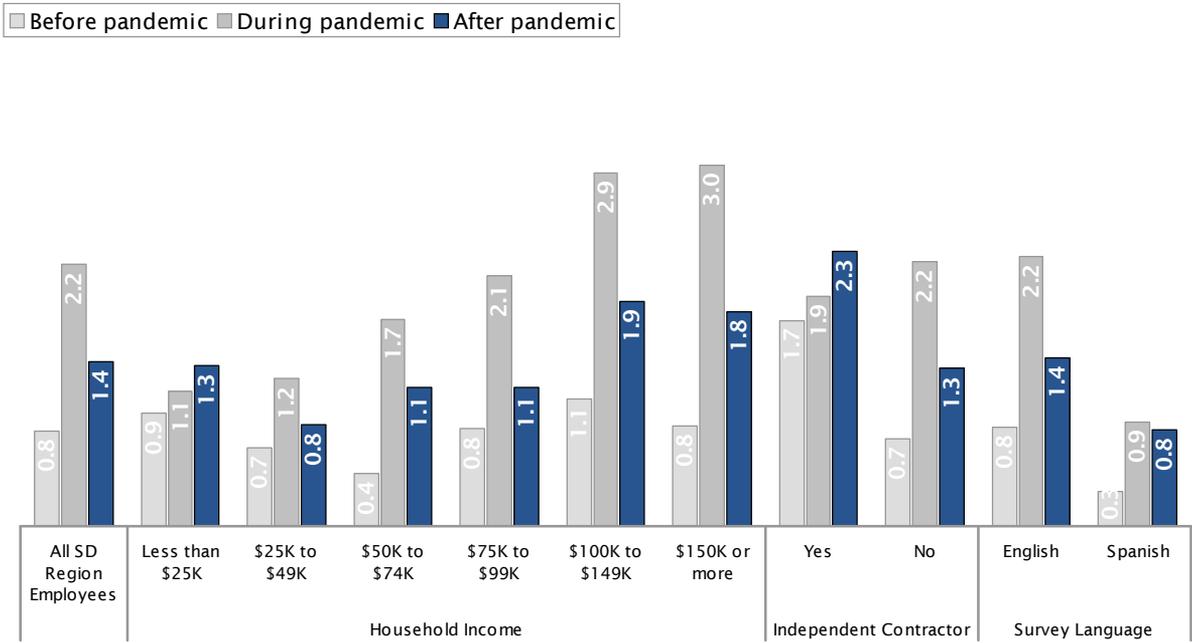


FIGURE 20 AVERAGE DAYS PER WEEK EXPECT TO PRIMARILY REMOTE WORK POST-PANDEMIC, OVERALL AND BY HOUSEHOLD INCOME, INDEPENDENT CONTRACTOR STATUS, AND SURVEY LANGUAGE



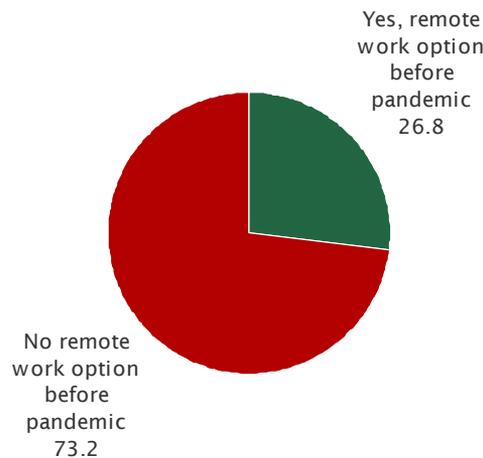
BUSINESSES: PRE-PANDEMIC

The opening question series in the 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 21, 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.

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



Figures 22-24 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.⁸ The most striking differences occur by industry, with professional services, administrative and support services, and a collection of 'other' smaller industries⁹ being much more likely than their counterparts to offer the option of working remotely pre-pandemic.

8. 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).

9. The *Other Industry* category includes the following NAICS industries: Utilities, Public Administration, Information, Transportation and Warehousing, and Other Services (except Public Administration).

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

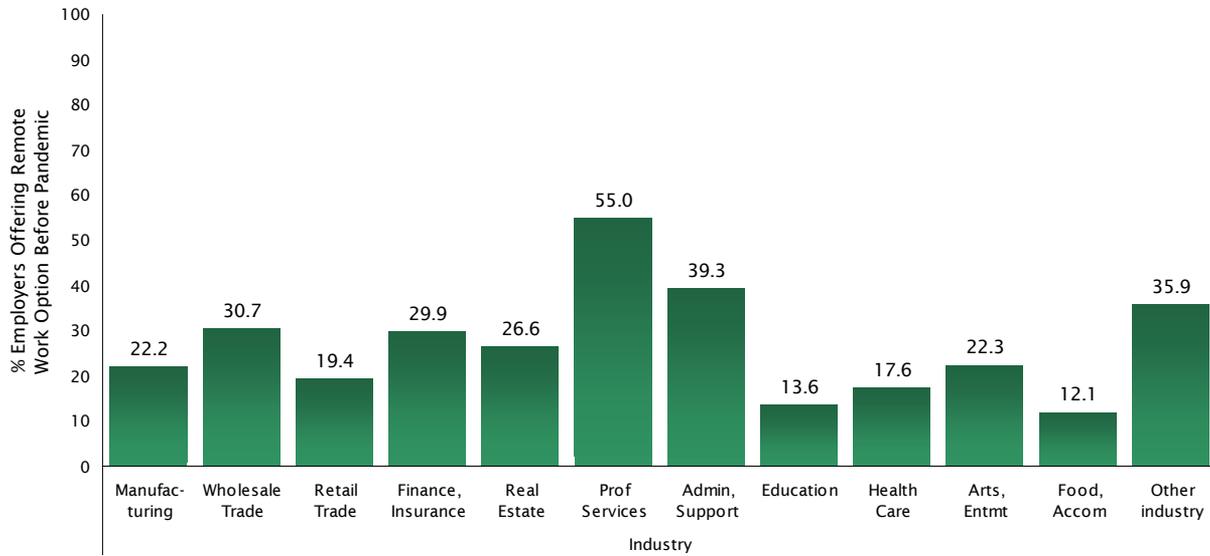


FIGURE 23 PRE-PANDEMIC: OPTION TO WORK FROM HOME AT LEAST 1 DAY PER WEEK BY NUMBER OF EMPLOYEES AT LOCATION & TIER 1 EMPLOYMENT CENTER

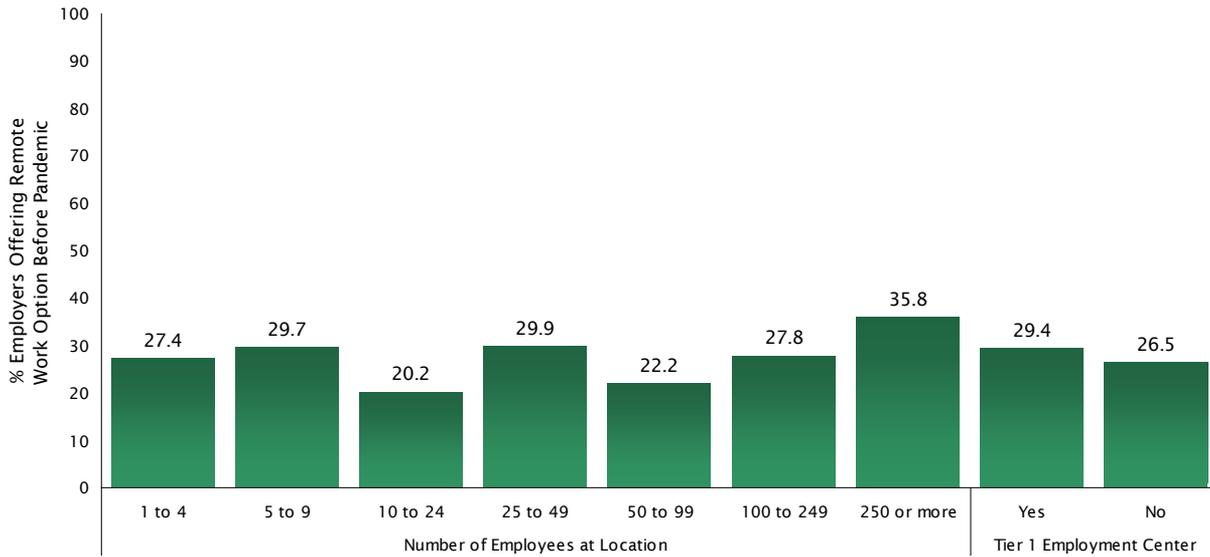
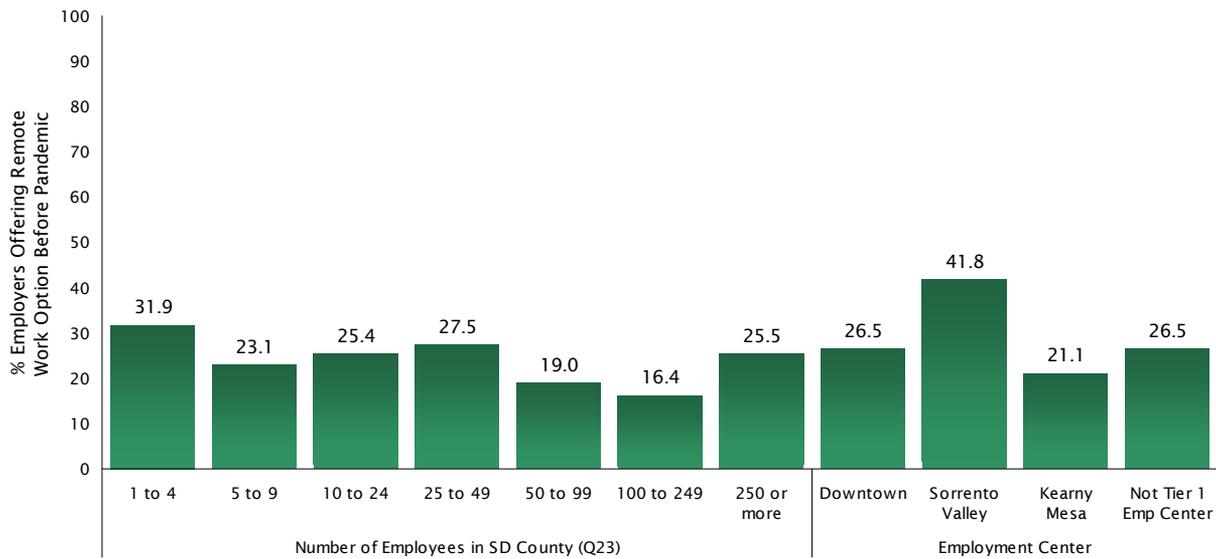


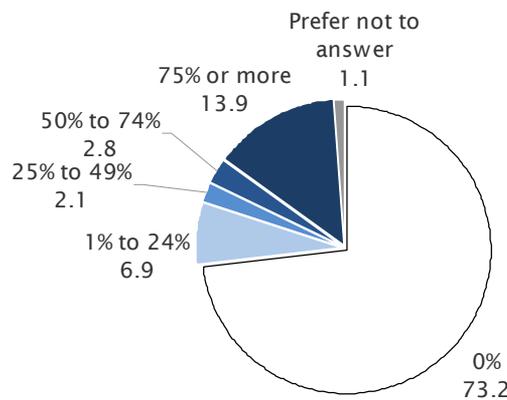
FIGURE 24 PRE-PANDEMIC: OPTION TO WORK FROM HOME AT LEAST 1 DAY PER WEEK BY NUMBER OF EMPLOYEES IN SD COUNTY & EMPLOYMENT CENTER



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 25 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.

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

FIGURE 25 PRE-PANDEMIC: PERCENTAGE OF EMPLOYEES WITH OPTION TO WORK FROM HOME AT LEAST 1 DAY PER WEEK



Figures 26-28 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 26 PRE-PANDEMIC: PERCENTAGE OF EMPLOYEES WITH OPTION TO WORK FROM HOME AT LEAST 1 DAY PER WEEK BY OVERALL & INDUSTRY ¹⁰

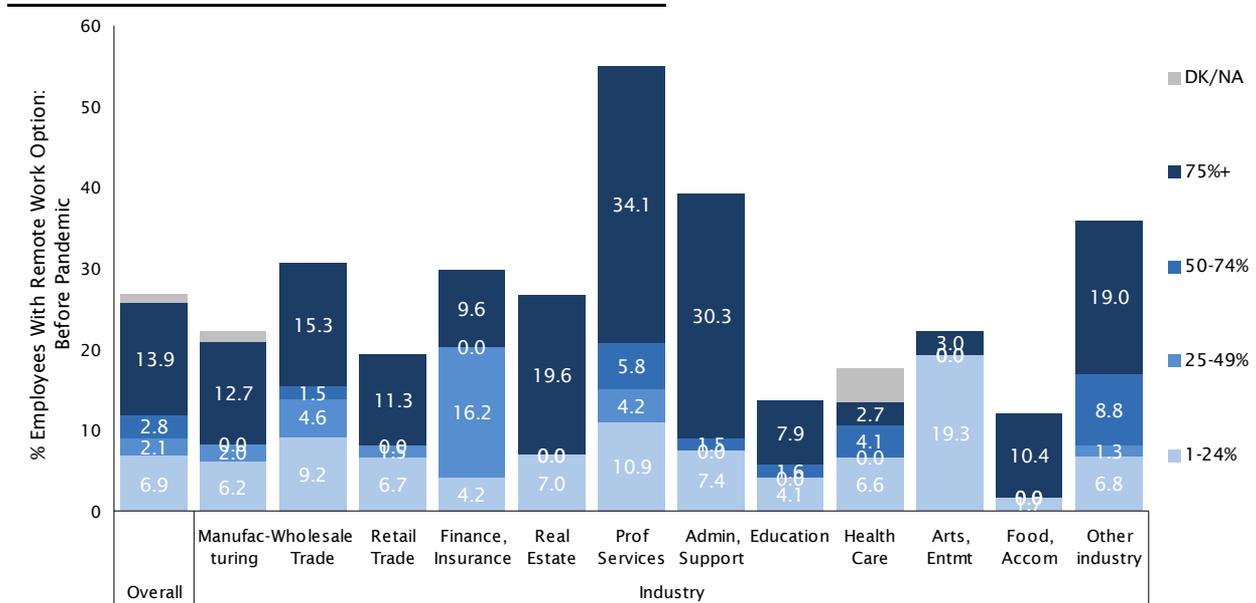
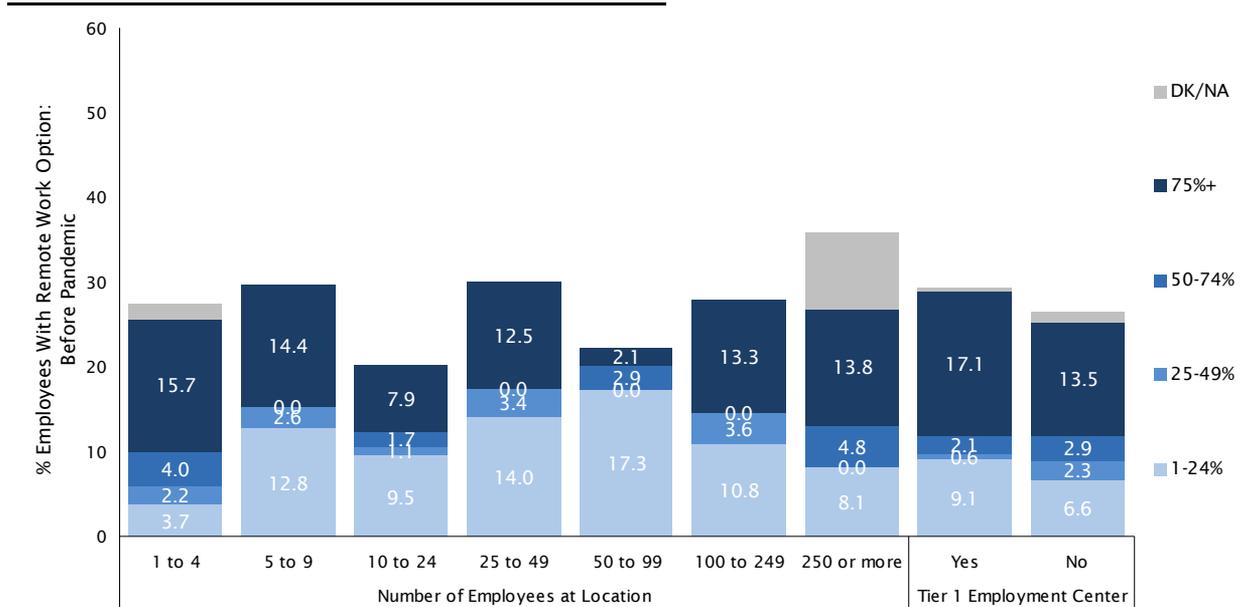
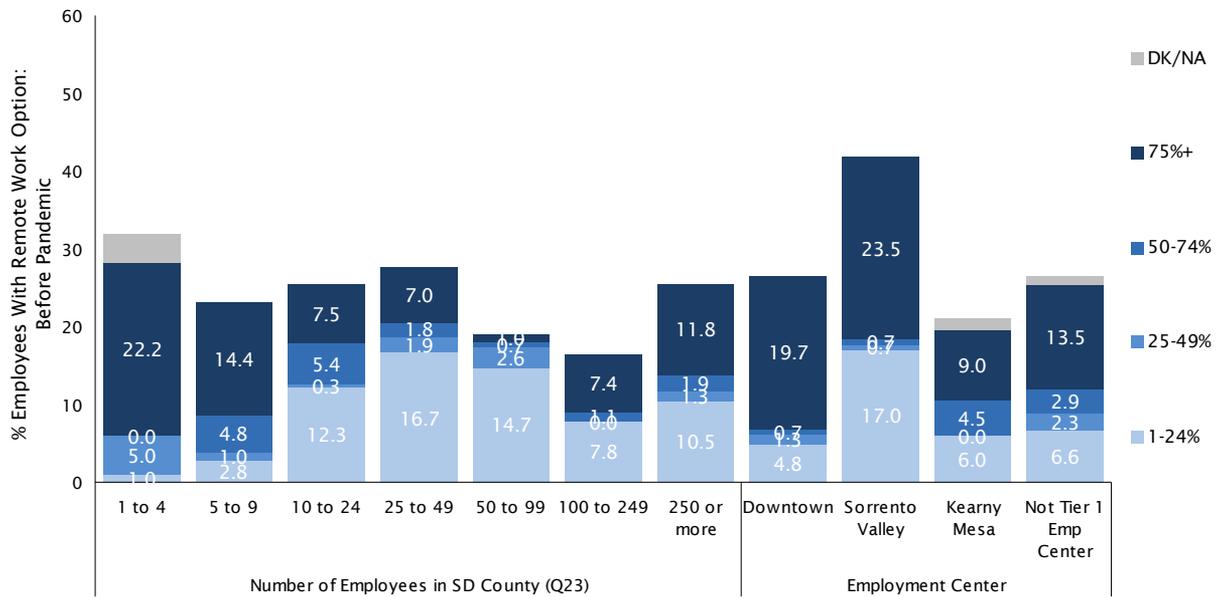


FIGURE 27 PRE-PANDEMIC: PERCENTAGE OF EMPLOYEES WITH OPTION TO WORK FROM HOME AT LEAST 1 DAY PER WEEK BY NUMBER OF EMPLOYEES AT LOCATION & TIER 1 EMPLOYMENT CENTER



10. 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 28 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

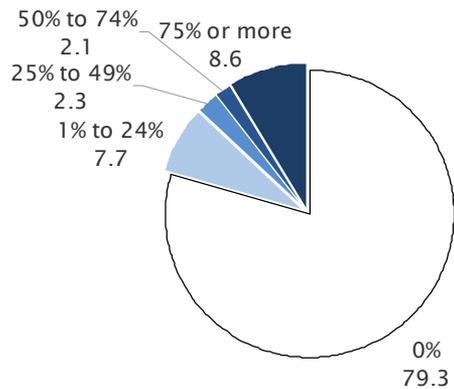


PERCENTAGE OF EMPLOYEES WORKING REMOTELY 1+ DAYS PER WEEK

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.

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 29 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 29). 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 30-32 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 30 PRE-PANDEMIC: PERCENTAGE OF EMPLOYEES THAT WORKED FROM HOME AT LEAST 1 DAY PER WEEK BY OVERALL & INDUSTRY

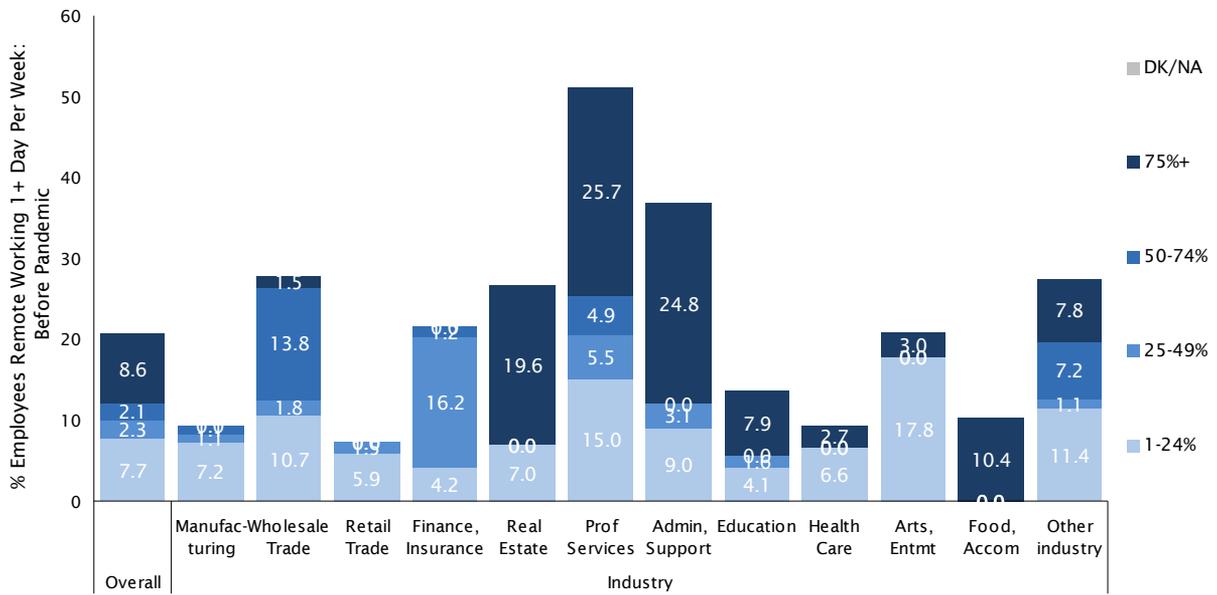


FIGURE 31 PRE-PANDEMIC: PERCENTAGE OF EMPLOYEES THAT WORKED FROM HOME AT LEAST 1 DAY PER WEEK BY NUMBER OF EMPLOYEES AT LOCATION & TIER 1 EMPLOYMENT CENTER

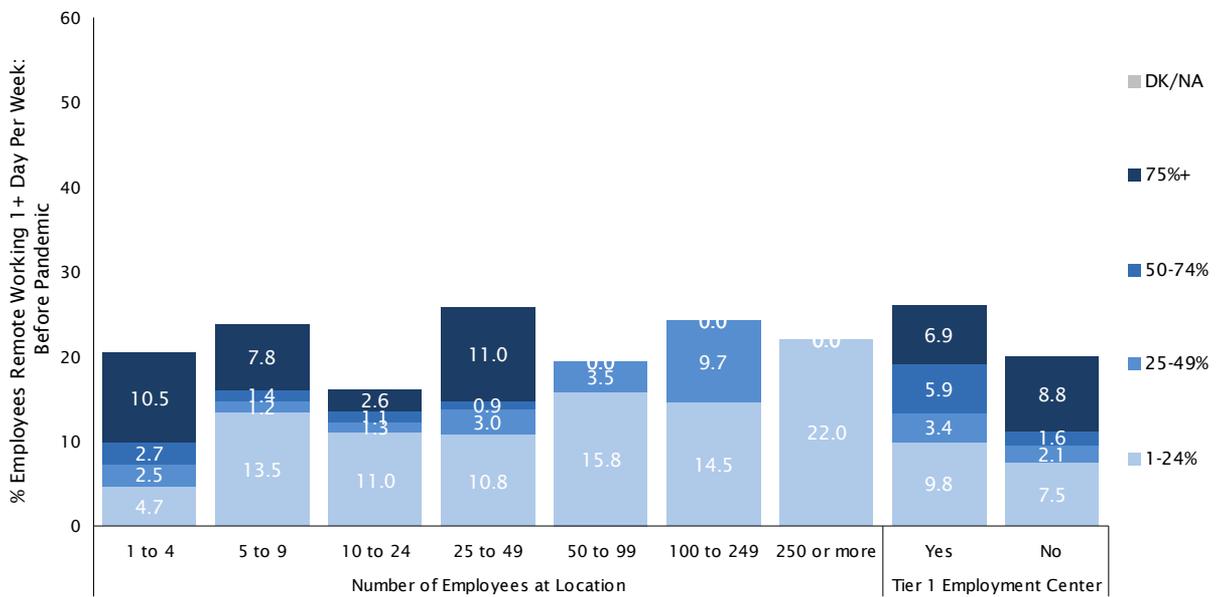
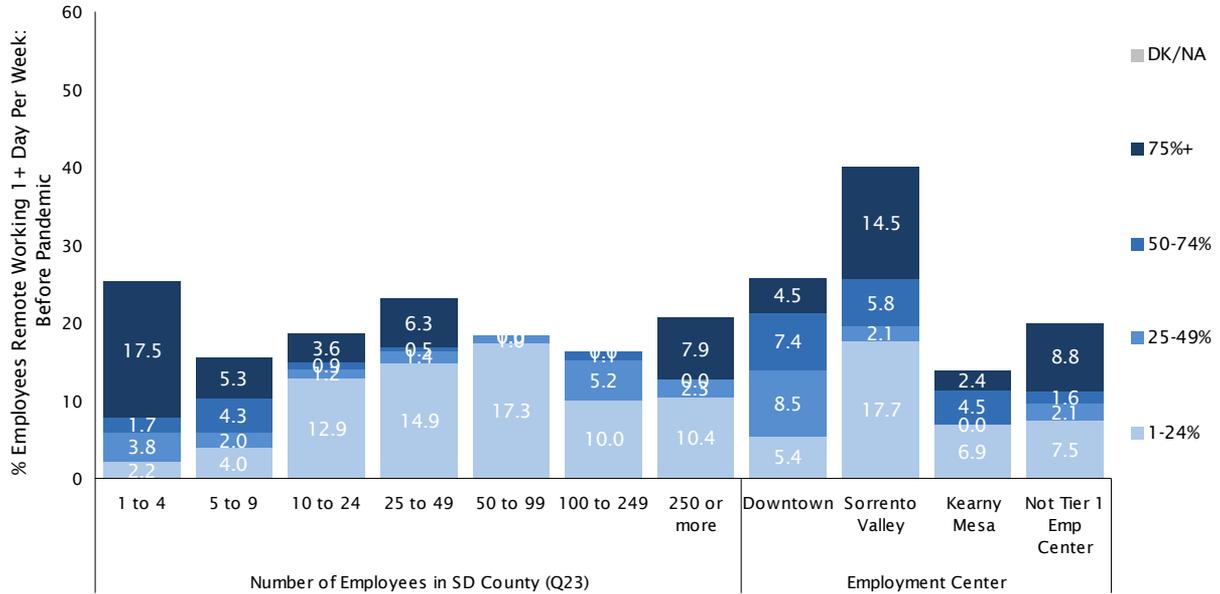


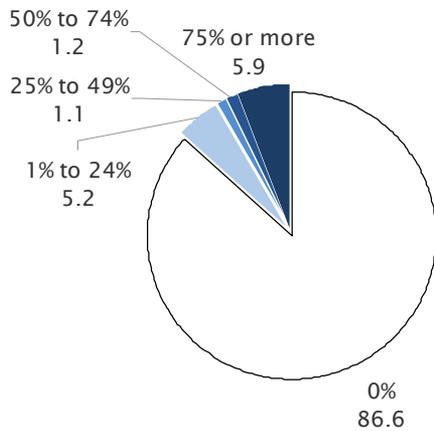
FIGURE 32 PRE-PANDEMIC: PERCENTAGE OF EMPLOYEES THAT WORKED FROM HOME AT LEAST 1 DAY PER WEEK BY NUMBER OF EMPLOYEES IN SD COUNTY & EMPLOYMENT CENTER



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.

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 33 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 33), 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 34-36, 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 34 PRE-PANDEMIC: PERCENTAGE OF EMPLOYEES THAT WORKED FROM HOME AT LEAST 3 DAYS PER WEEK BY OVERALL & INDUSTRY

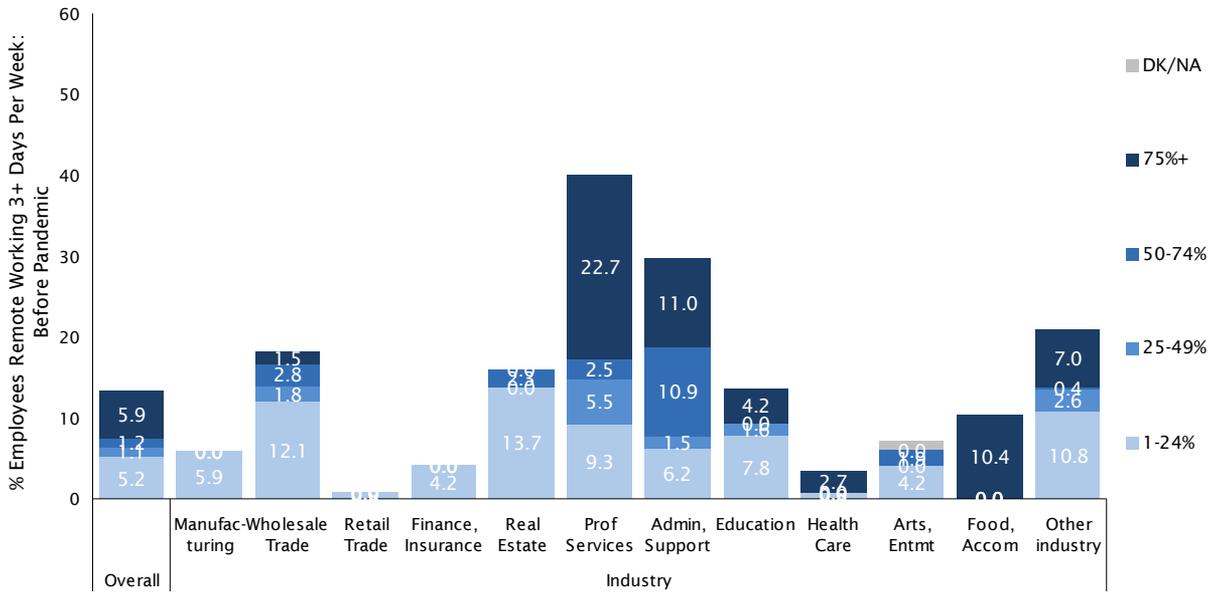


FIGURE 35 PRE-PANDEMIC: PERCENTAGE OF EMPLOYEES THAT WORKED FROM HOME AT LEAST 3 DAYS PER WEEK BY NUMBER OF EMPLOYEES AT LOCATION & TIER 1 EMPLOYMENT CENTER

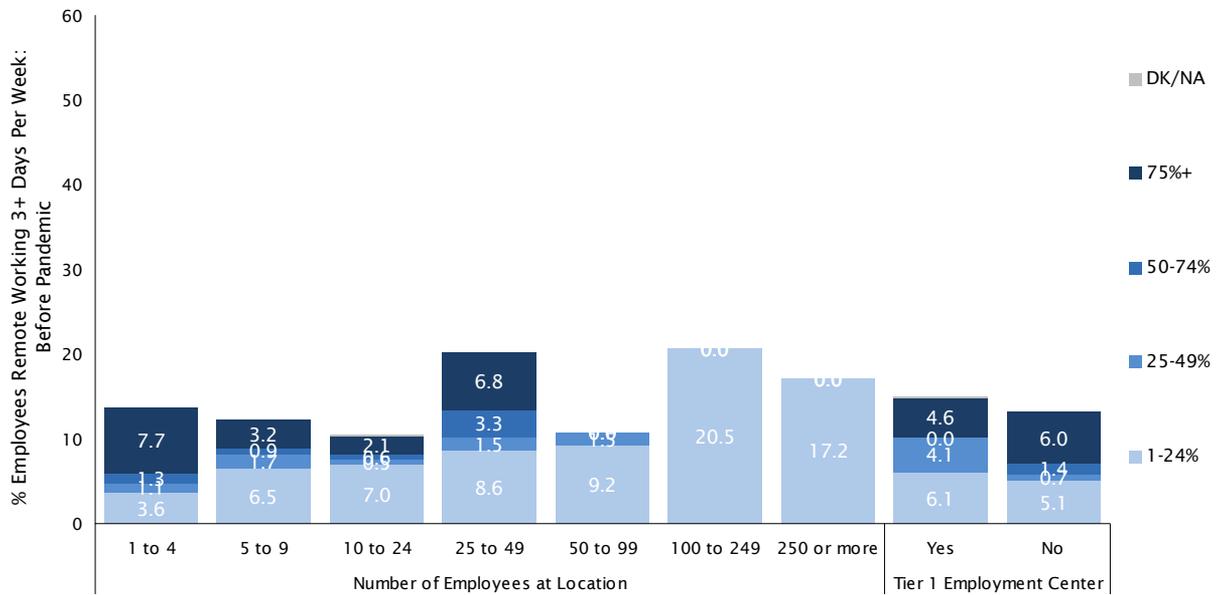
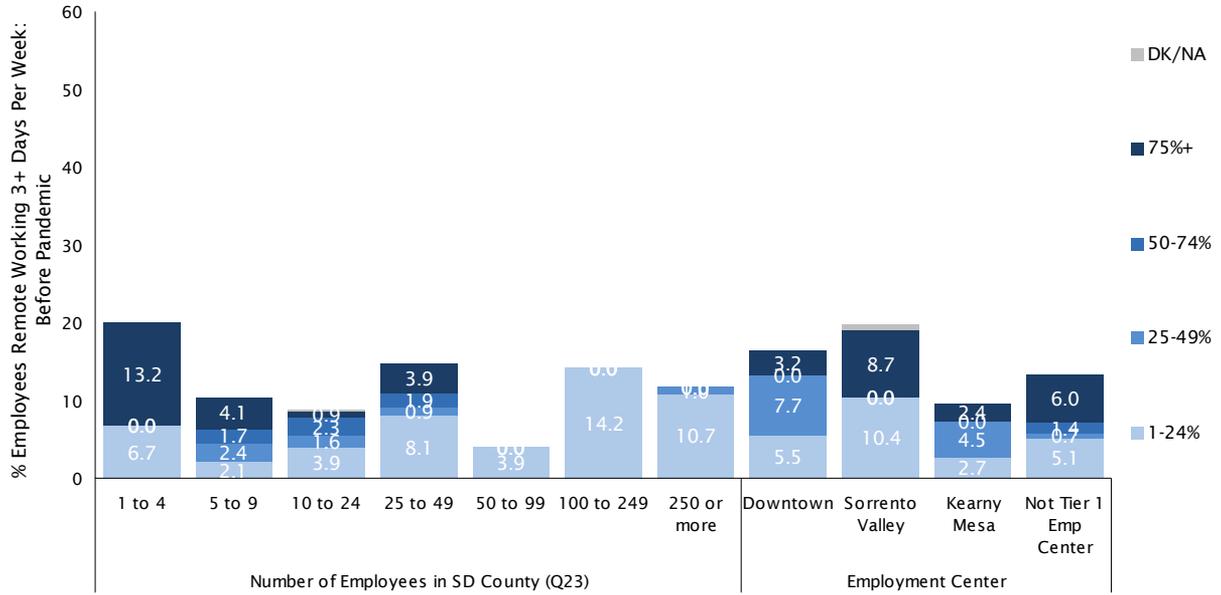


FIGURE 36 PRE-PANDEMIC: PERCENTAGE OF EMPLOYEES THAT WORKED FROM HOME AT LEAST 3 DAYS PER WEEK BY NUMBER OF EMPLOYEES IN SD COUNTY & EMPLOYMENT CENTER



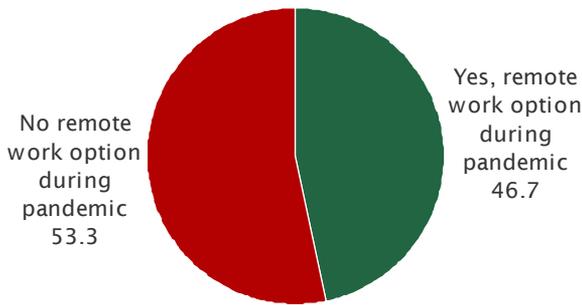
BUSINESSES: DURING PANDEMIC

Having captured the remote work policies and practices of San Diego businesses prior to the pandemic, the survey next asked businesses to report on their *current* remote work patterns (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 21 on page 16), nearly half of businesses surveyed (47%) indicated that they currently provide this option to employees (Figure 37).

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 37 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 38-40 to their pre-pandemic counterparts reveals that the largest increases in companies offering a remote work option 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).

insurances 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 38 DURING PANDEMIC: OPTION TO WORK FROM HOME AT LEAST 1 DAY PER WEEK BY INDUSTRY

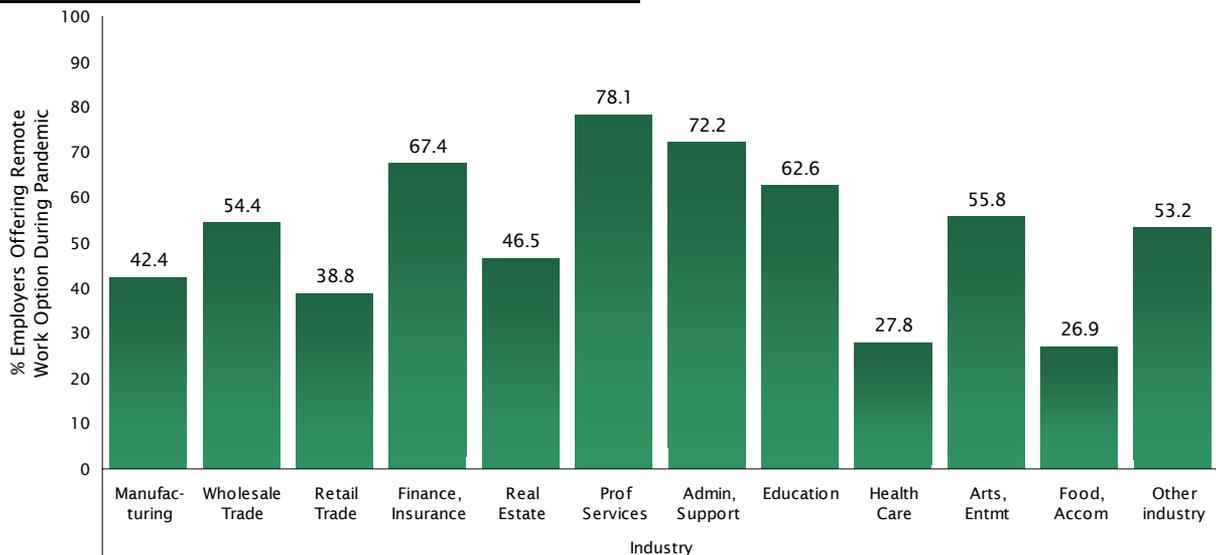


FIGURE 39 DURING PANDEMIC: OPTION TO WORK FROM HOME AT LEAST 1 DAY PER WEEK BY NUMBER OF EMPLOYEES AT LOCATION, TIER 1 EMPLOYMENT CENTER & REMOTE WORK OPTION BEFORE PANDEMIC

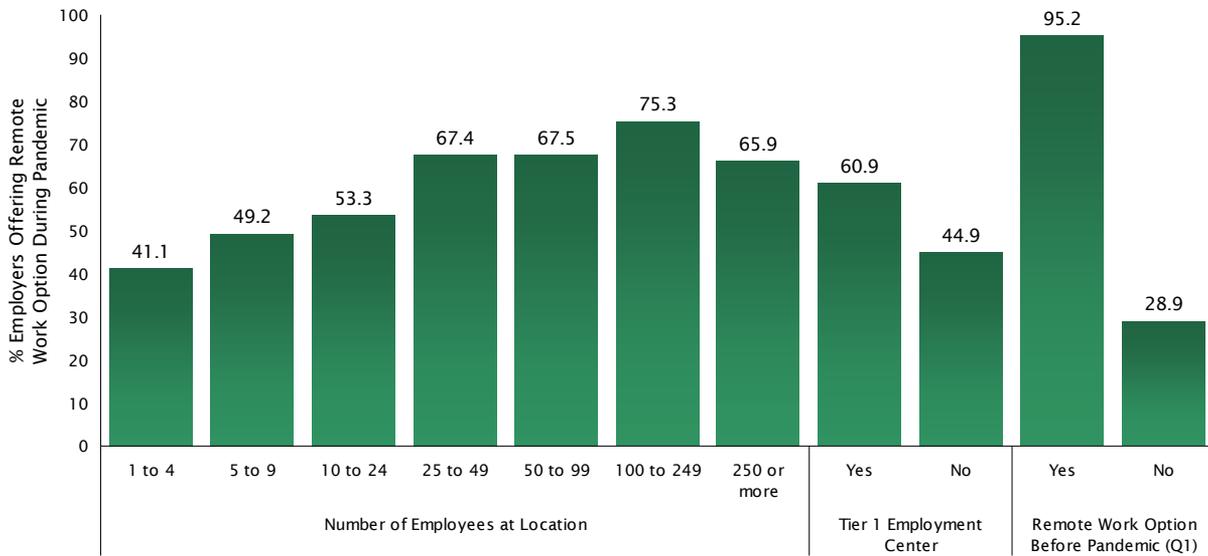
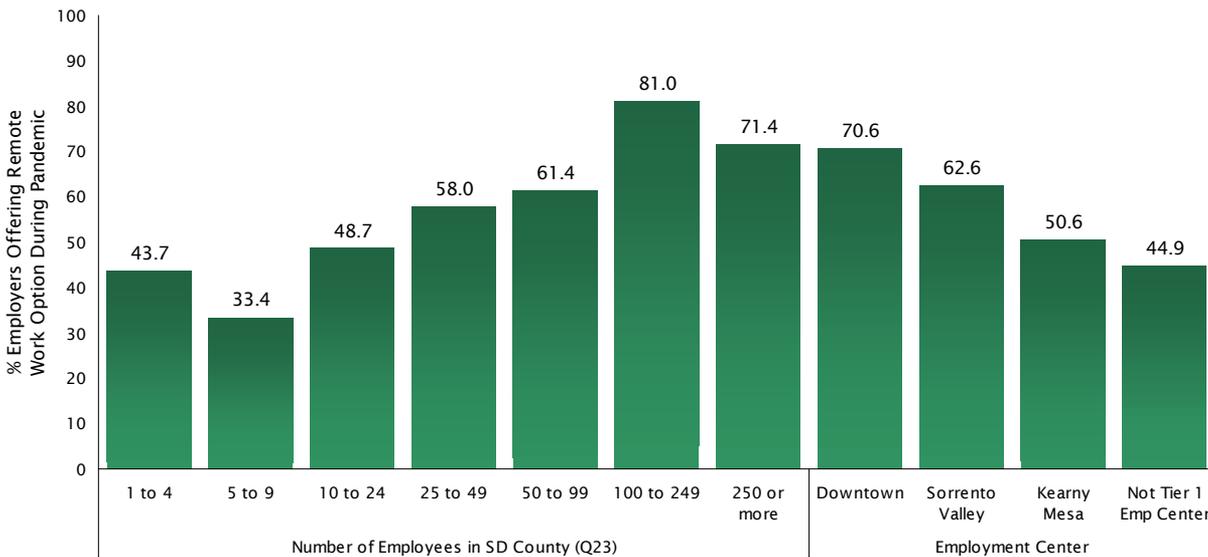


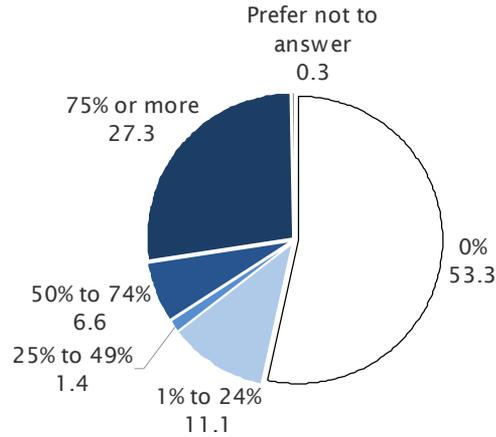
FIGURE 40 DURING PANDEMIC: OPTION TO WORK FROM HOME AT LEAST 1 DAY PER WEEK BY NUMBER OF EMPLOYEES IN SD COUNTY & EMPLOYMENT CENTER



PERCENTAGE OF EMPLOYEES WITH REMOTE WORK OPTION Businesses that indicated they currently 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 were given the option to work remotely (see Figure 41). Just over half of San Diego businesses (53%) indicated they do *not* currently offer a remote work option, while the remainder were split between those who offer 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 25 on page 18) to 27% (Figure 41).

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



Figures 42-44 display the percentage of business surveyed that currently 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 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 42 DURING PANDEMIC: PERCENTAGE OF EMPLOYEES WITH OPTION TO WORK FROM HOME AT LEAST 1 DAY PER WEEK BY OVERALL & INDUSTRY

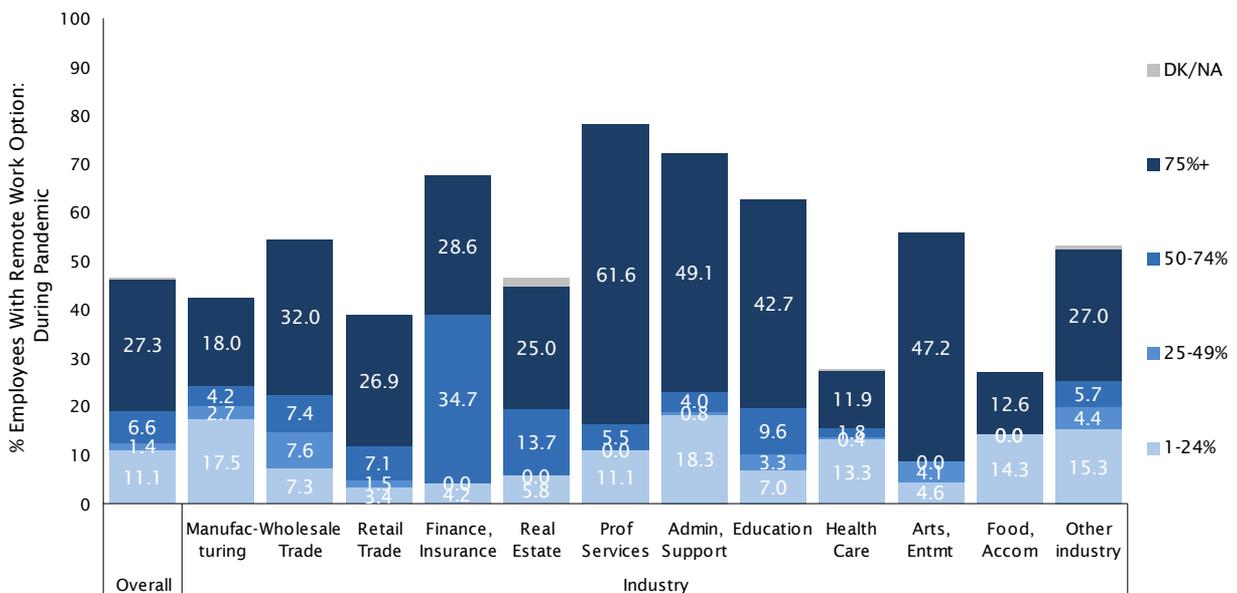


FIGURE 43 DURING PANDEMIC: PERCENTAGE OF EMPLOYEES WITH OPTION TO WORK FROM HOME AT LEAST 1 DAY PER WEEK BY NUMBER OF EMPLOYEES AT LOCATION & TIER 1 EMPLOYMENT CENTER

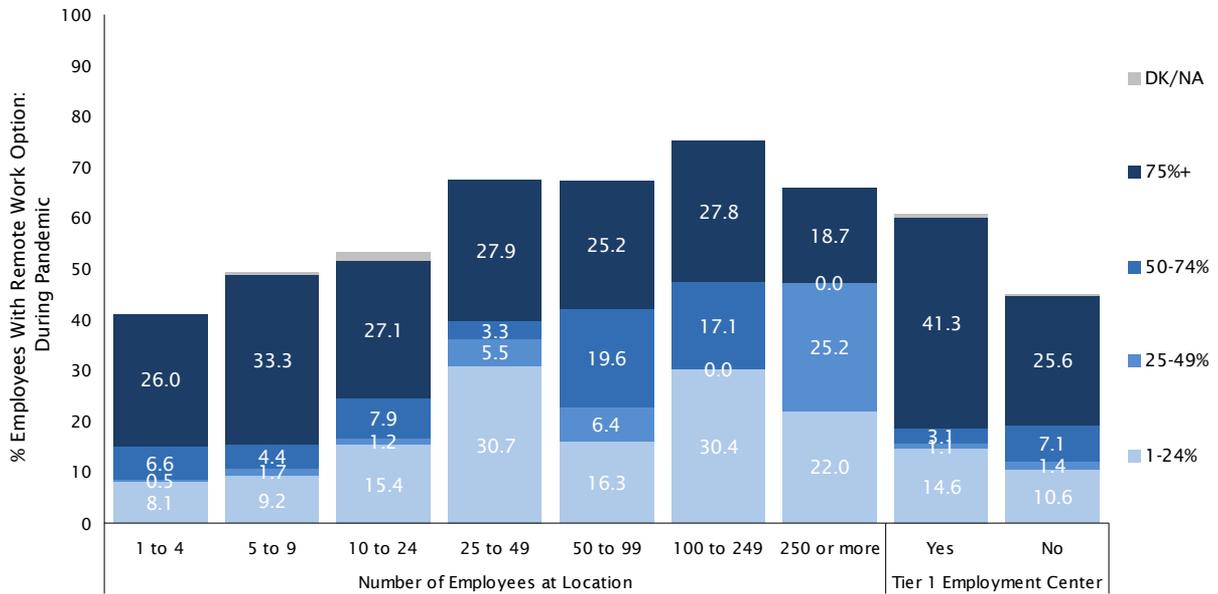
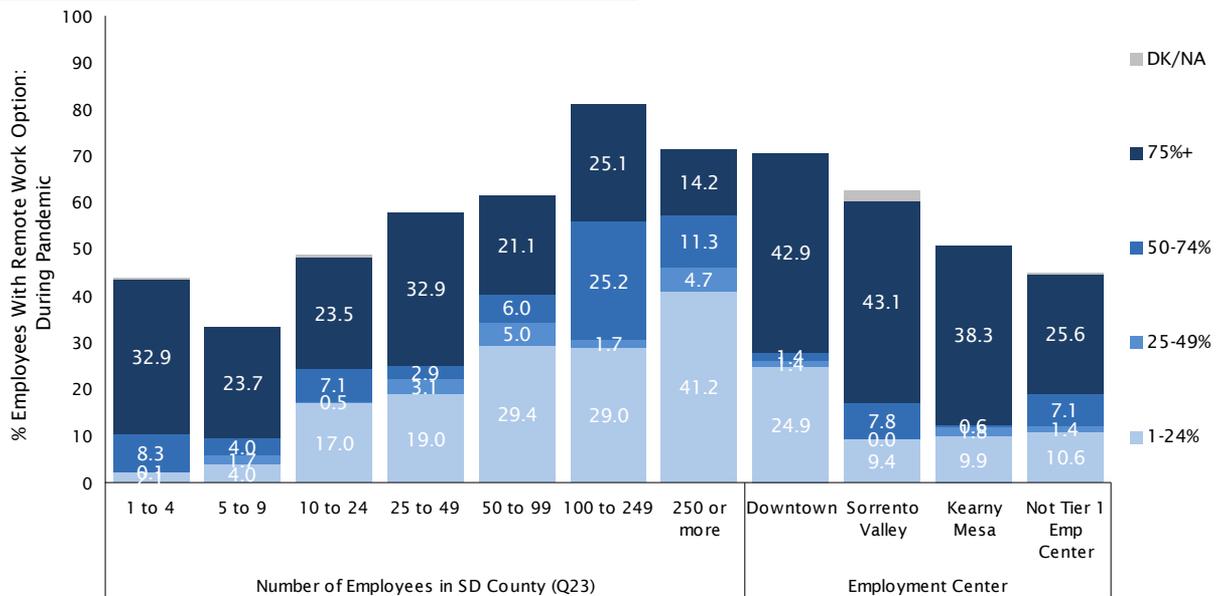


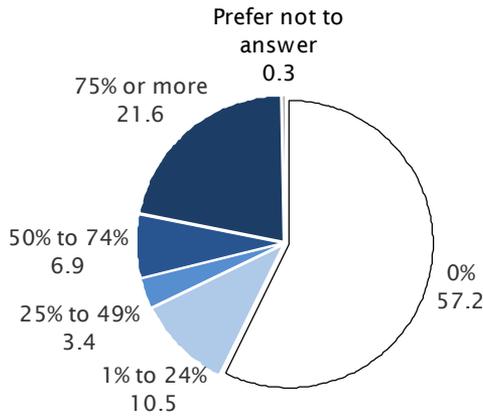
FIGURE 44 DURING PANDEMIC: PERCENTAGE OF EMPLOYEES WITH OPTION TO WORK FROM HOME AT LEAST 1 DAY PER WEEK BY NUMBER OF EMPLOYEES IN SD COUNTY & EMPLOYMENT CENTER



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 45, 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 is 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.

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

FIGURE 45 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 42-45) were also the most likely to estimate that at least three-quarters of their workforce is currently working remotely at least one day per week (see Figures 46-48).

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

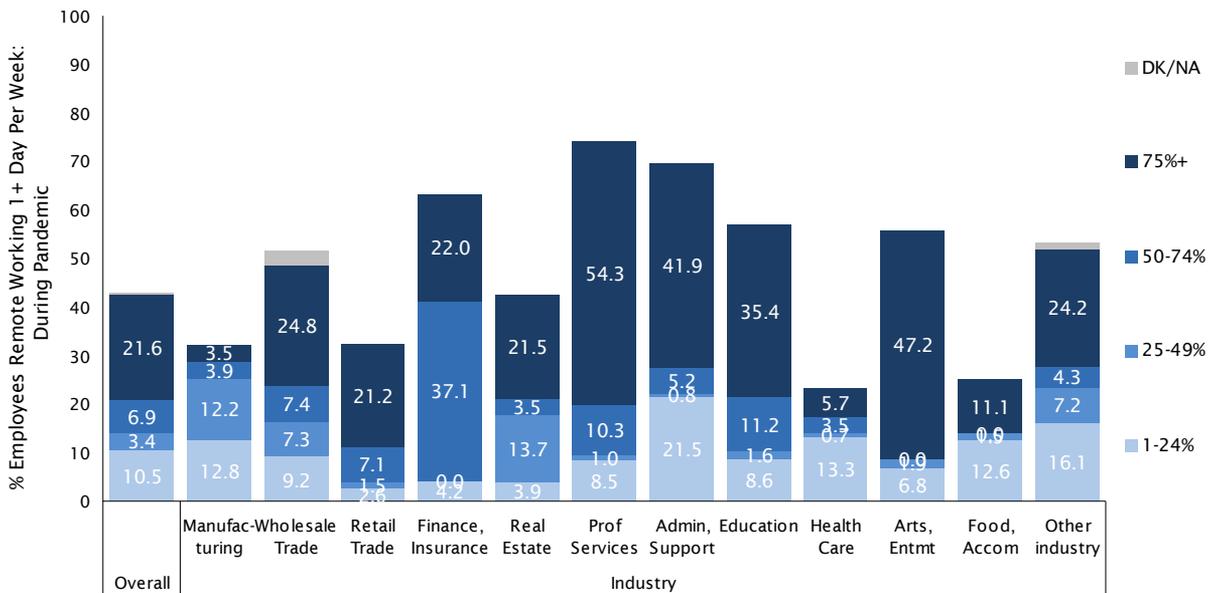


FIGURE 47 DURING PANDEMIC: PERCENTAGE OF EMPLOYEES THAT WORK FROM HOME AT LEAST 1 DAY PER WEEK BY NUMBER OF EMPLOYEES AT LOCATION & TIER 1 EMPLOYMENT CENTER

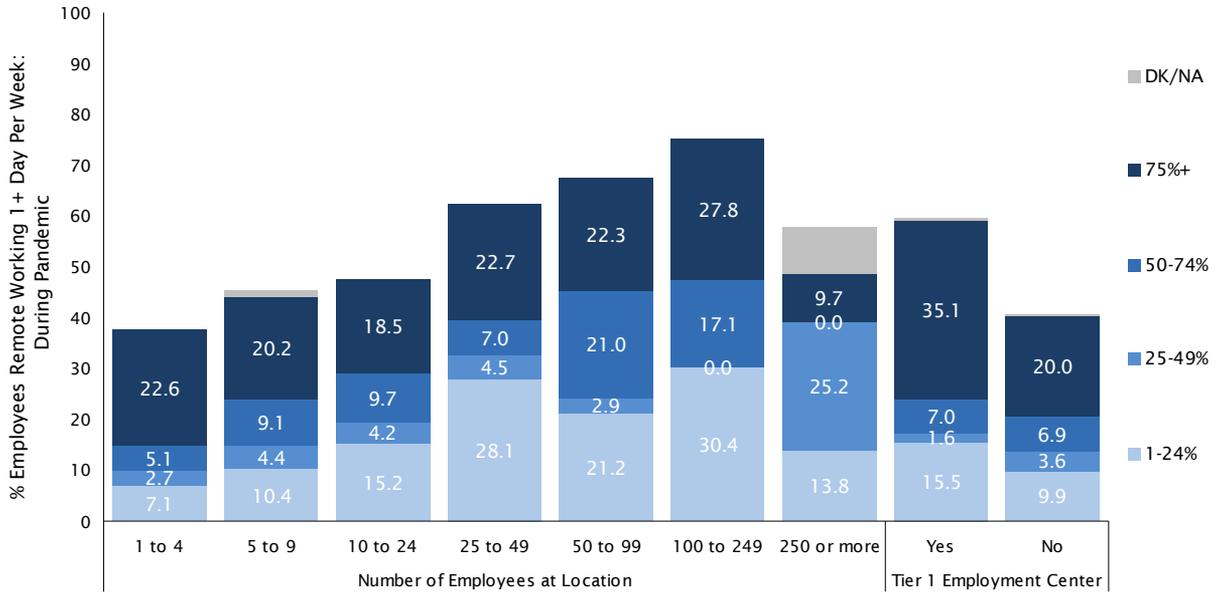
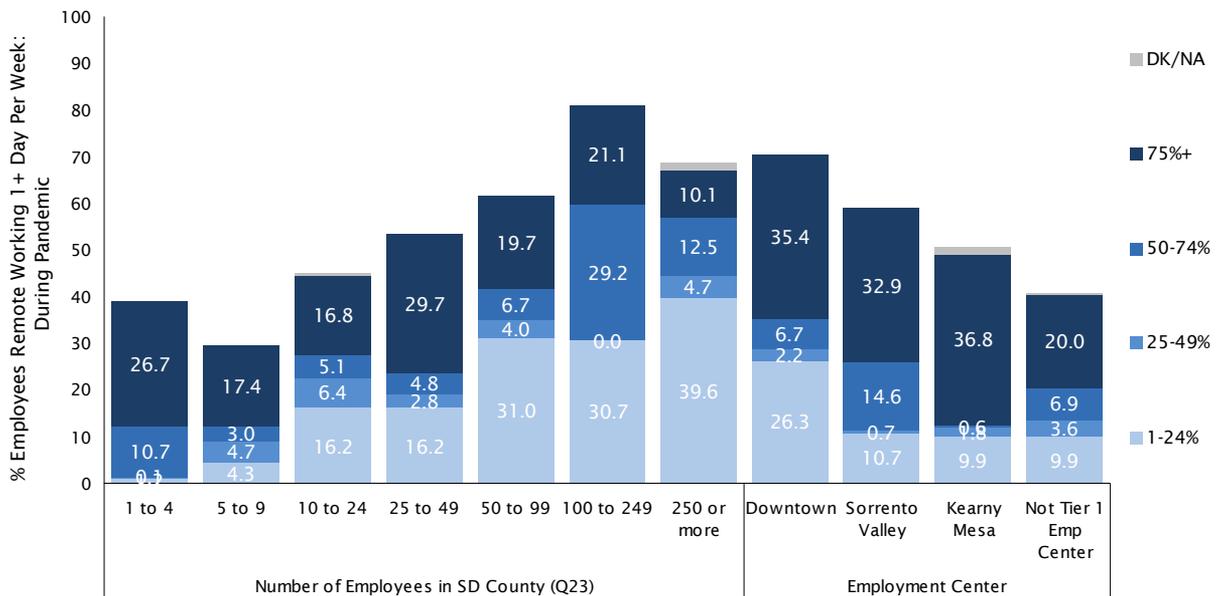


FIGURE 48 DURING PANDEMIC: PERCENTAGE OF EMPLOYEES THAT WORK FROM HOME AT LEAST 1 DAY PER WEEK BY NUMBER OF EMPLOYEES IN SD COUNTY & EMPLOYMENT CENTER



PERCENTAGE OF EMPLOYEES WORKING REMOTELY 3+ DAYS PER WEEK

When asked to estimate the percentage of their workforce that is currently 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 are currently working from home most of the time (Figure 49), with 11% indicating that less than one-quarter do so, 4% stating 25% to 49%, 4% indicating 50% to 74%, and 18% reporting that at least three-quarters of their employees are

currently working remotely most days. The percentage of businesses that estimated the majority of their workforce is working from home *most* of the time increased from 7% prior to the pandemic to 22% currently. 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 50-52).

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

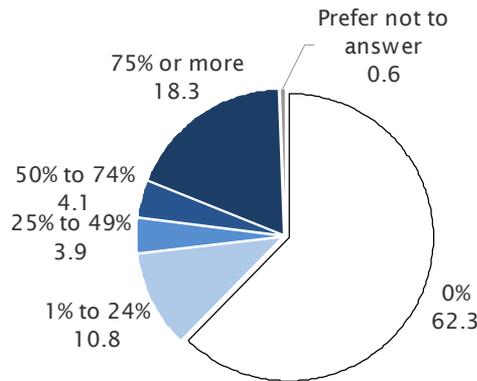


FIGURE 50 DURING PANDEMIC: PERCENTAGE OF EMPLOYEES THAT WORK FROM HOME AT LEAST 3 DAYS PER WEEK BY OVERALL & INDUSTRY

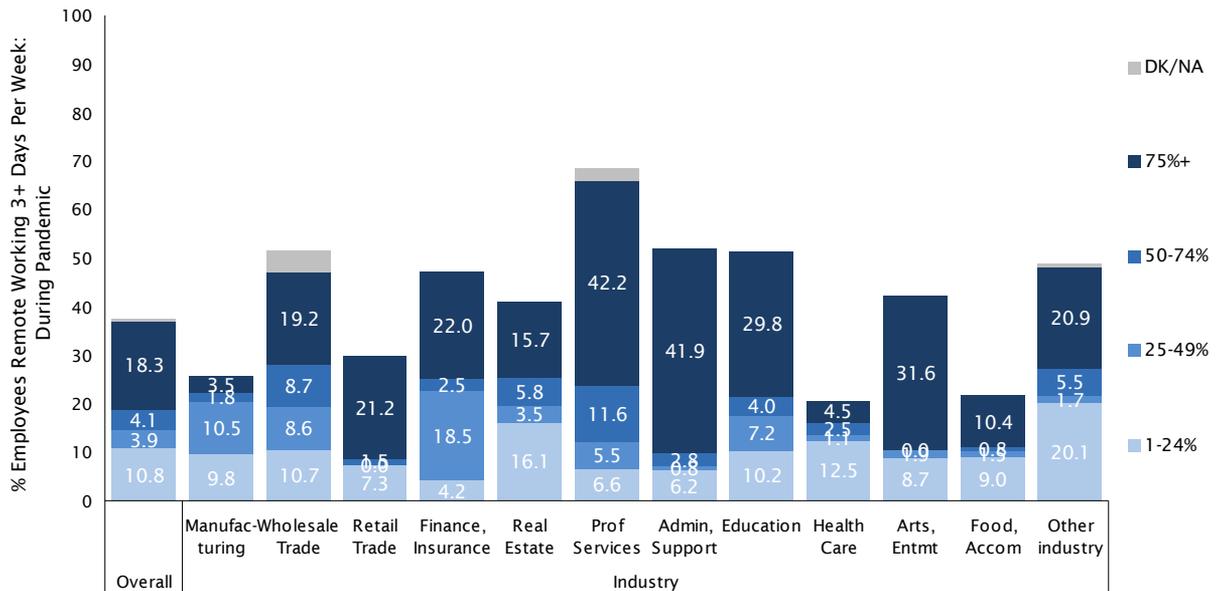


FIGURE 51 DURING PANDEMIC: PERCENTAGE OF EMPLOYEES THAT WORK FROM HOME AT LEAST 3 DAYS PER WEEK BY NUMBER OF EMPLOYEES AT LOCATION & TIER 1 EMPLOYMENT CENTER

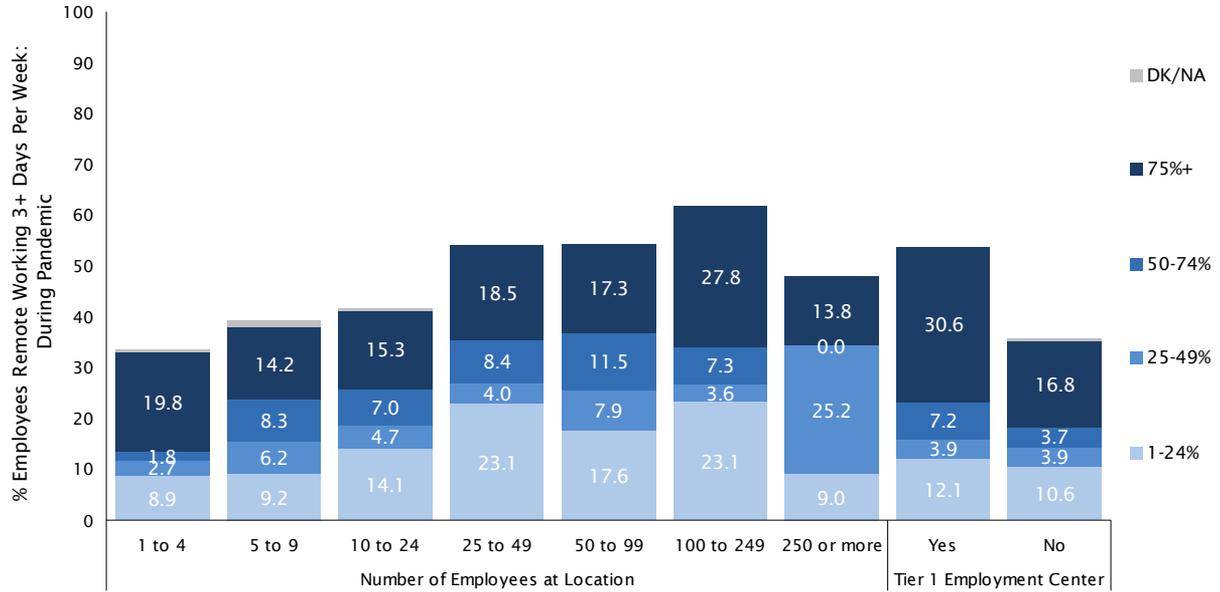
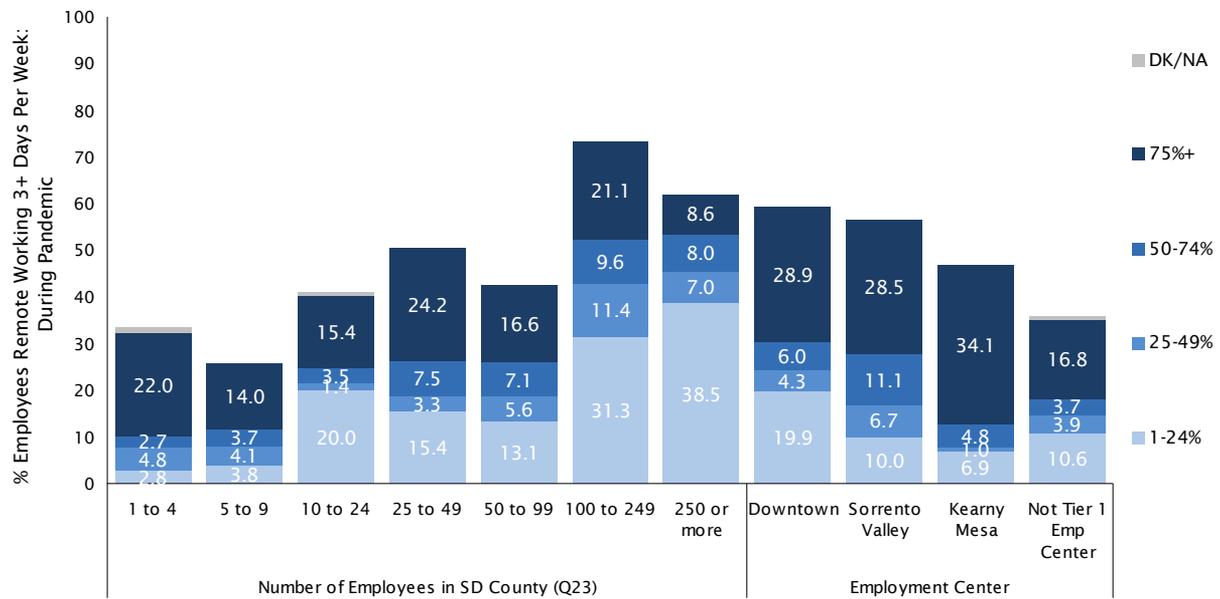


FIGURE 52 DURING PANDEMIC: PERCENTAGE OF EMPLOYEES THAT WORK FROM HOME AT LEAST 3 DAYS PER WEEK BY NUMBER OF EMPLOYEES IN SD COUNTY & EMPLOYMENT CENTER



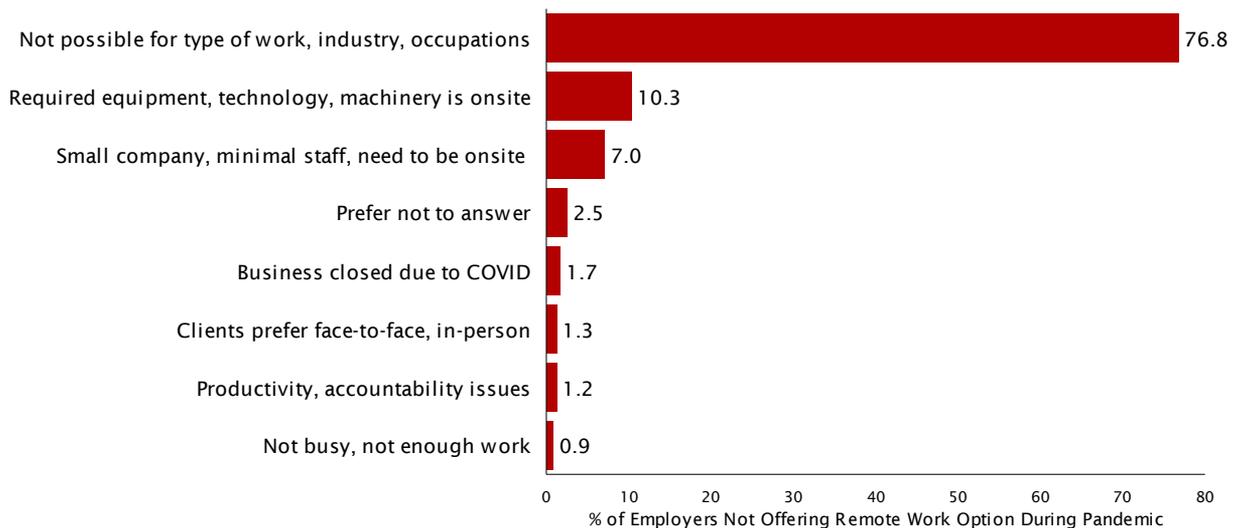
BUSINESSES: BARRIERS TO REMOTE WORK

Just over half of all businesses surveyed in the San Diego region (53%) indicated that, despite the pandemic, they currently do not offer a remote work option to employees. For businesses that fit this profile, Question 9 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 is 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 is 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 53).

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 53 REASONS FOR NOT ALLOWING EMPLOYEES TO WORK FROM HOME AT LEAST 1 DAY PER WEEK



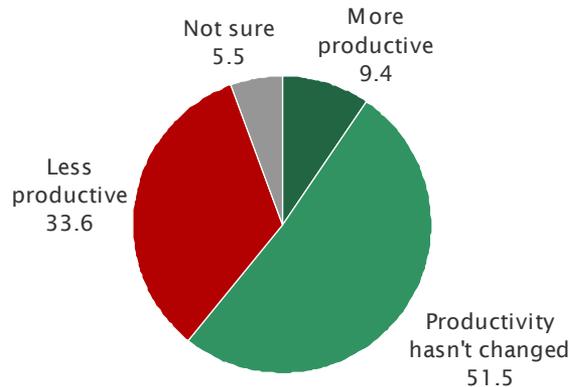
BUSINESSES: IMPACTS OF REMOTE WORK

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 how having more of their workforce working from home has impacted the company’s productivity, approximately half (52%) indicated that productivity hasn’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 is less productive (34%) was nearly four times as large as the percentage who felt the change made their company more productive (9%).

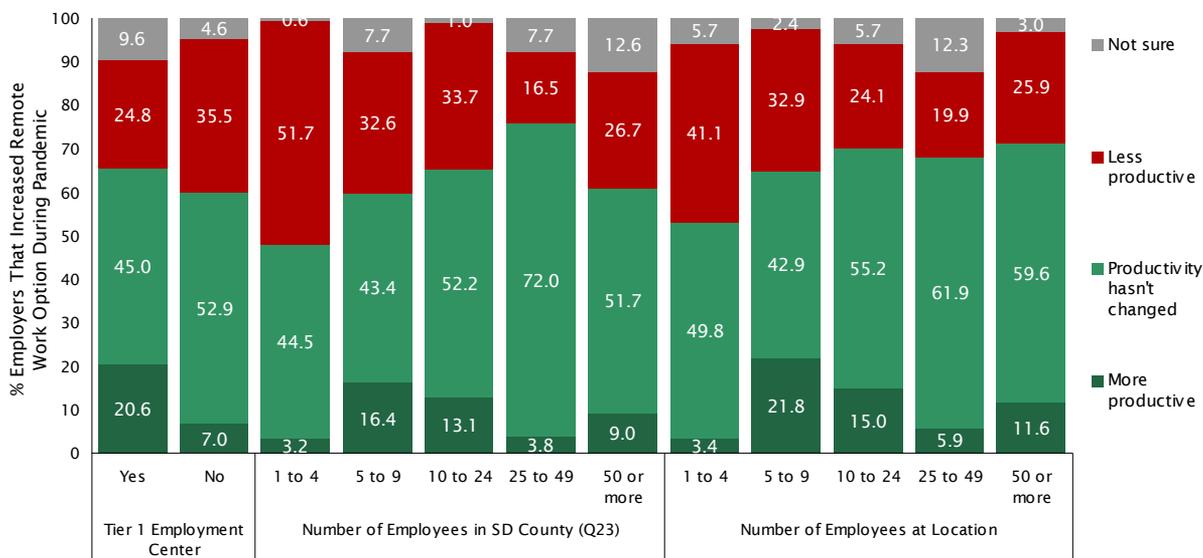
Question 11 *You indicated that the percentage of employees who are working from home at least one day per week has increased during the past year. With a higher percentage of employees working from home, would you say overall your company is more productive, less productive, or has it not changed your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

FIGURE 54 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 to report a loss in productivity associated with having more of their workforce working remotely during the pandemic (see Figure 55).

FIGURE 55 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



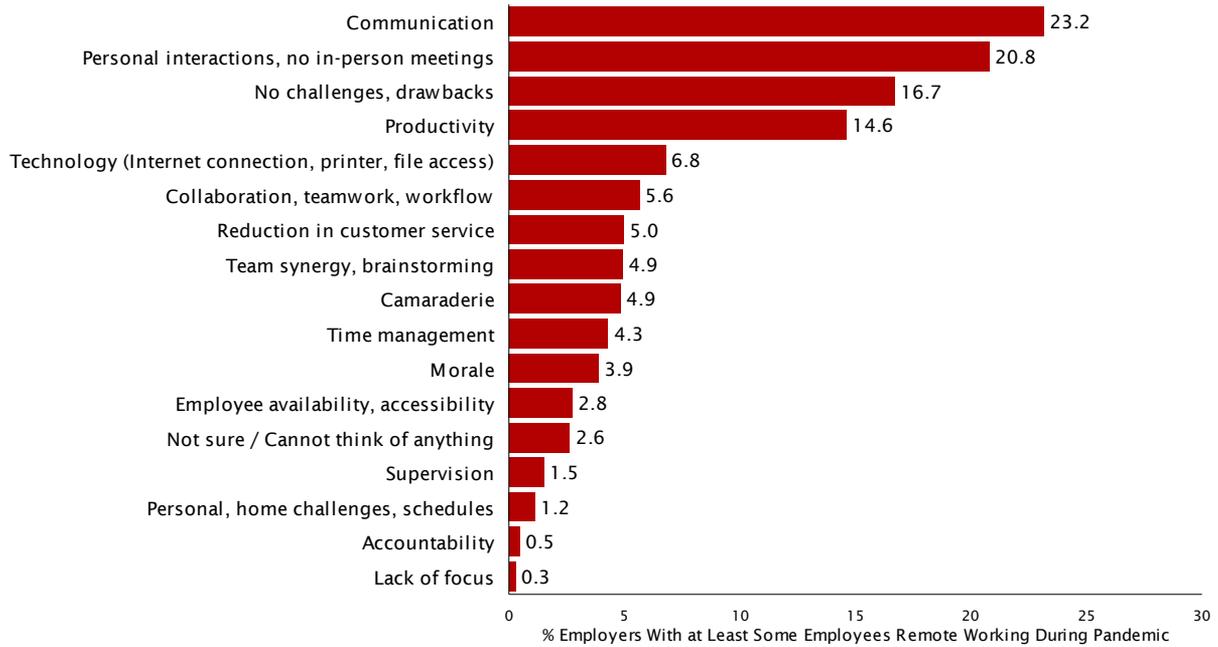
BIGGEST CHALLENGES & BENEFITS TO REMOTE WORK All businesses that currently had at least one employee working remotely were next asked to describe the biggest challenges or drawbacks for their business associated with employees working from home (Question 12), as well as the biggest benefits (Question 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 56 (challenges) and Figure 57 (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%). 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 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.

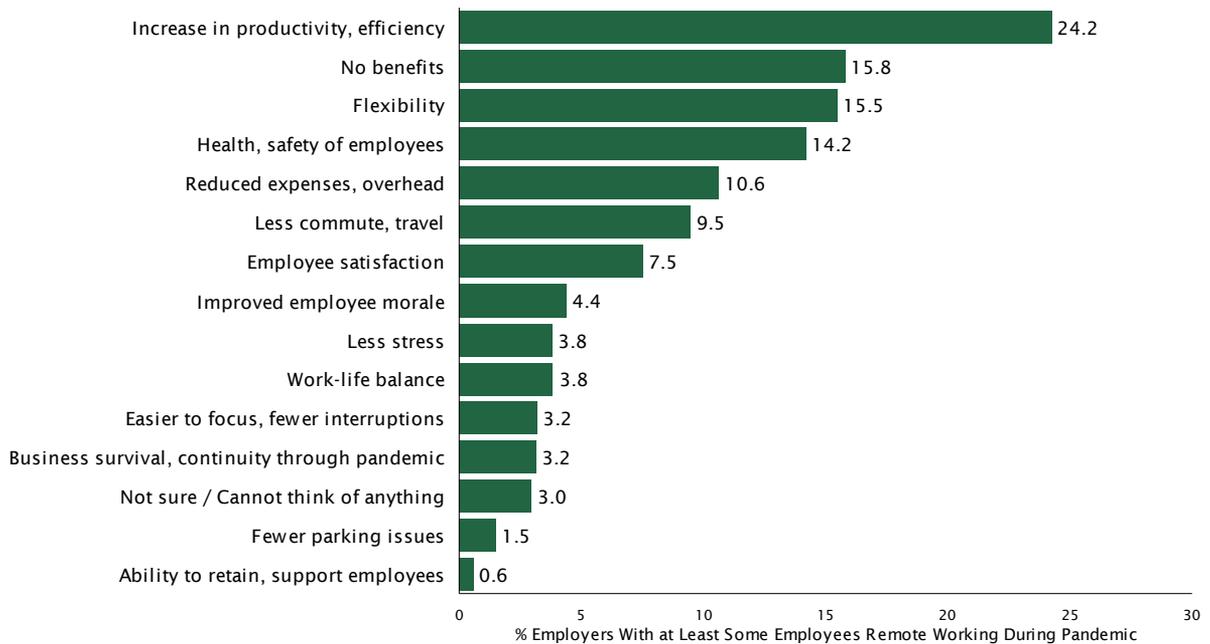
Question 12 *What would you say is the biggest challenge or drawback for your business that comes from employees working from home?*

FIGURE 56 BIGGEST CHALLENGE, DRAWBACK FOR BUSINESS DUE TO EMPLOYEES WORKING FROM HOME



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

FIGURE 57 BIGGEST BENEFIT TO BUSINESS FROM EMPLOYEES WORKING FROM HOME

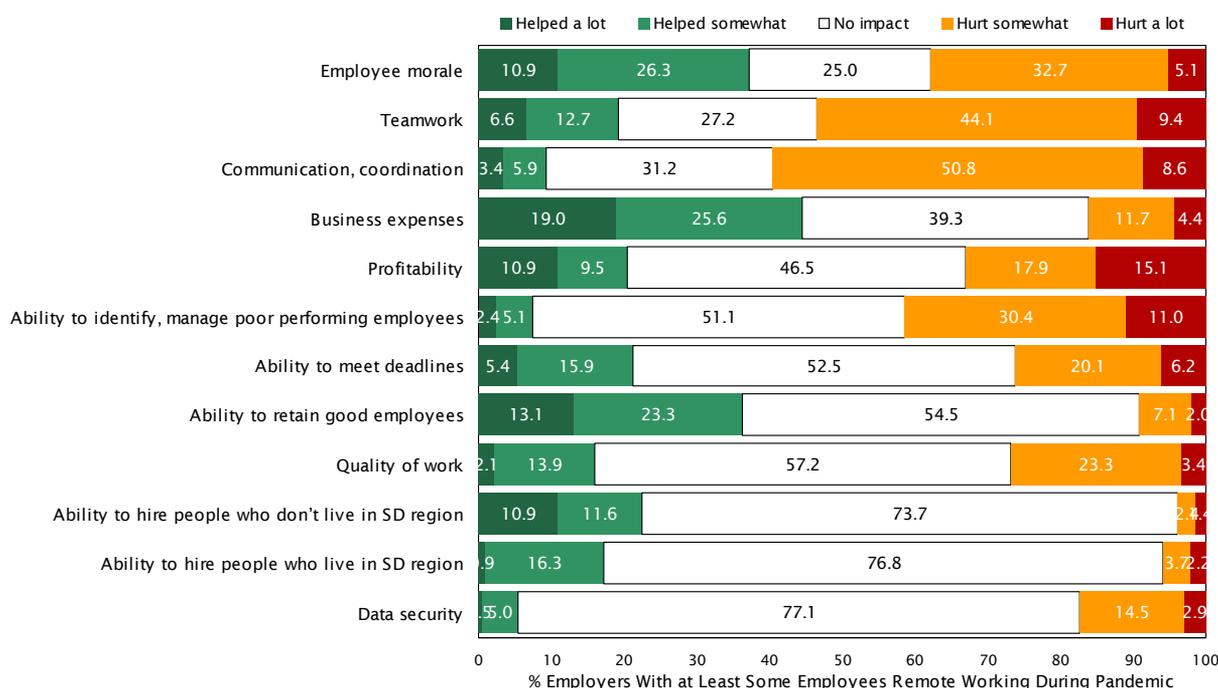


IMPACT OF REMOTE WORK ON BUSINESS ASPECTS Having captured the most salient challenges and benefits of remote work arrangements for businesses in an open-ended manner (see prior section), the survey next presented respondents with the list of items shown on the left of Figure 58 and simply asked whether having more employees working from home has 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 58 from high to low based on the percentage who indicated the dimension has been impacted (helped or hurt).

Businesses reported that employee morale, teamwork, and communication/coordination are 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 have 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.

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: _____?*

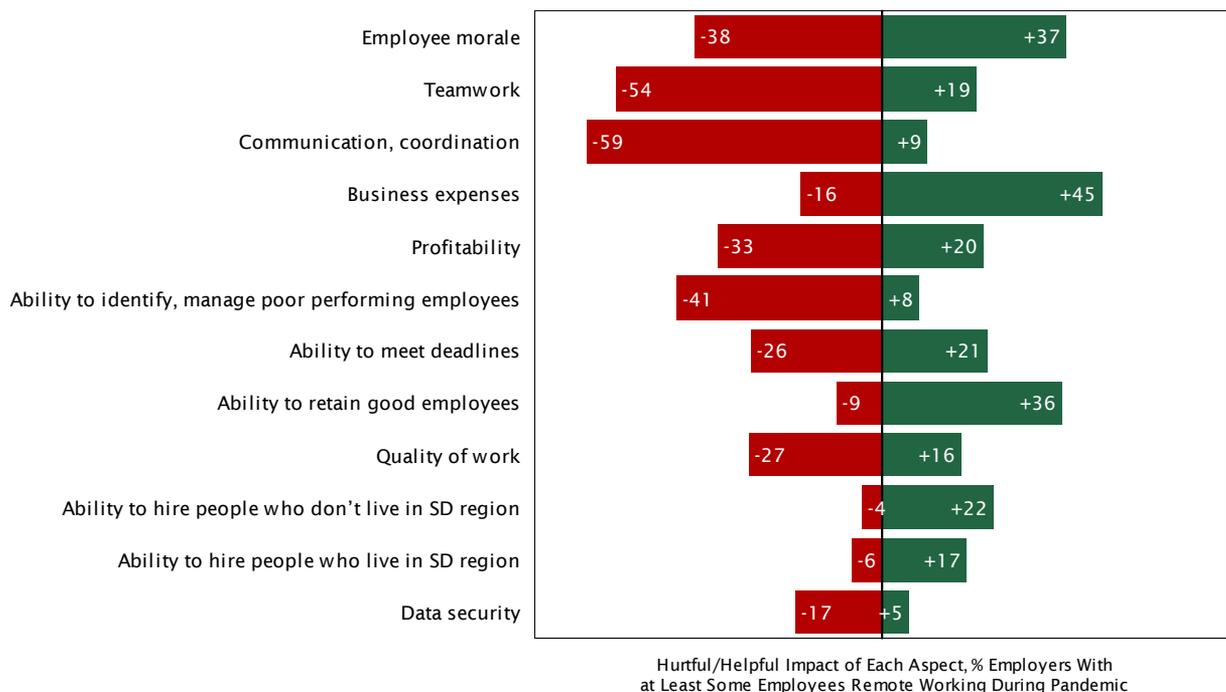
FIGURE 58 IMPACT OF EMPLOYEES WORKING FROM HOME



For every dimension tested, some respondents felt that remote work arrangements helped their business, while others perceived they hurt their business. Figure 59 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 59 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 next asked to identify actions their business may have taken to accommodate employees working from home (or problems experienced). As shown in Figure 60 on the next page, more than half of businesses surveyed 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 61 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).

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

FIGURE 60 CHANGES & CHALLENGES DUE TO EMPLOYEES WORKING FROM HOME

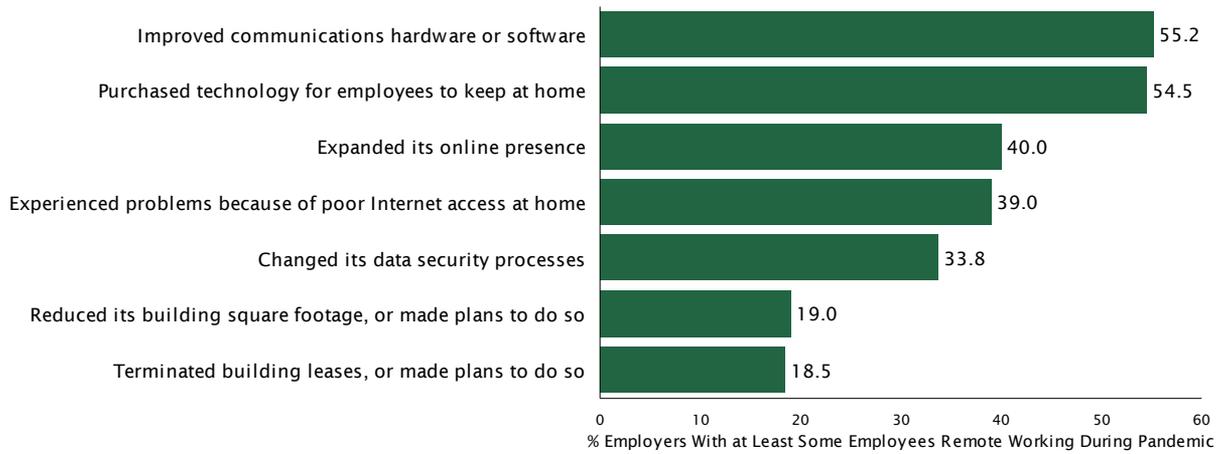
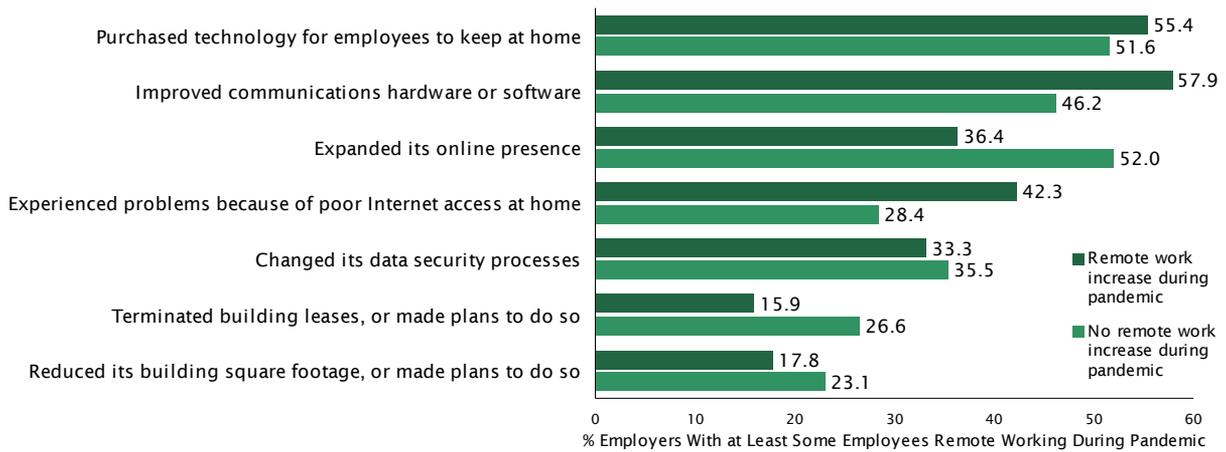


FIGURE 61 CHANGES & CHALLENGES DUE TO EMPLOYEES WORKING FROM HOME BY REMOTE WORK INCREASE DURING PANDEMIC (AMONG BIZ WITH CURRENT REMOTE WORKERS)



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 have allowed some existing employees to move away from the San Diego region and keep their jobs by working from home (see Figure 62). Overall, 11% of businesses indicated that they have 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%). 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 63-65).

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

FIGURE 62 ALLOWED EMPLOYEES TO MOVE AWAY & KEEP THEIR JOB BY TELEWORKING

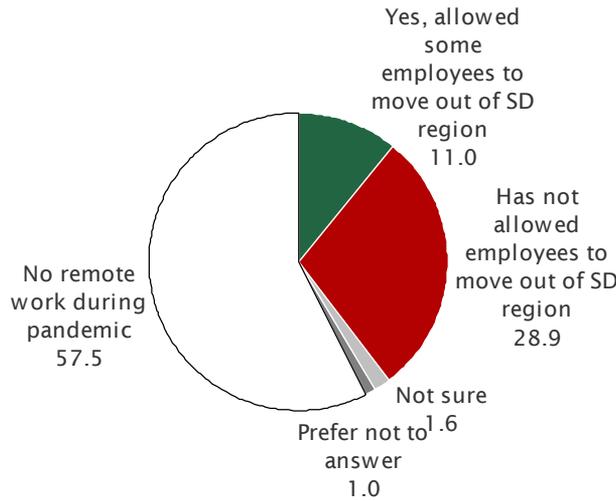


FIGURE 63 ALLOWED EMPLOYEES TO MOVE AWAY & KEEP THEIR JOB BY TELEWORKING BY INDUSTRY

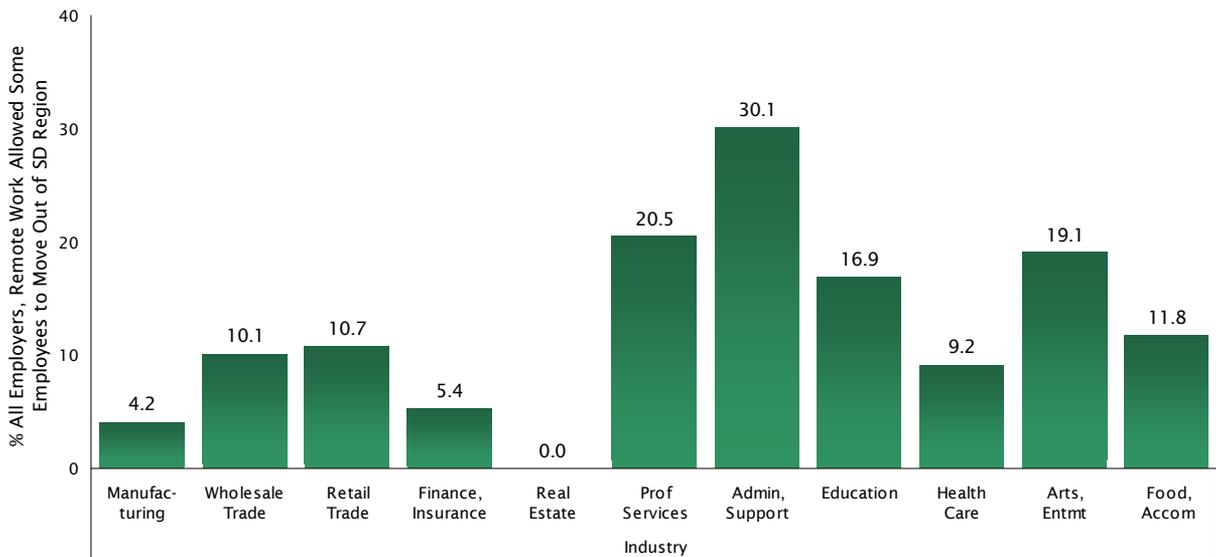


FIGURE 64 ALLOWED EMPLOYEES TO MOVE AWAY & KEEP THEIR JOB BY TELEWORKING BY NUMBER OF EMPLOYEES AT LOCATION & TIER 1 EMPLOYMENT CENTER

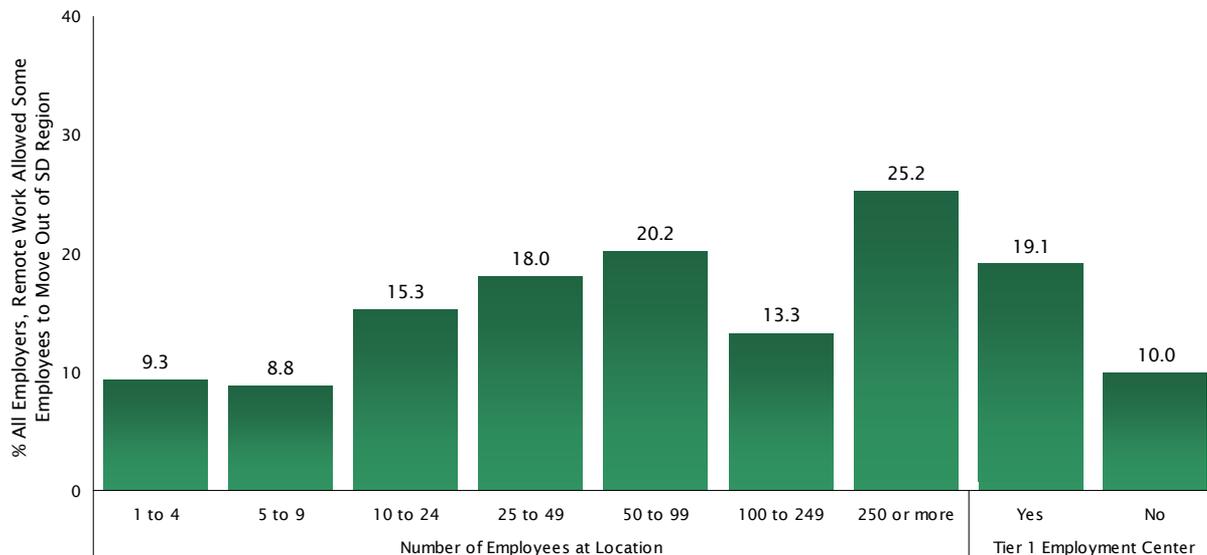
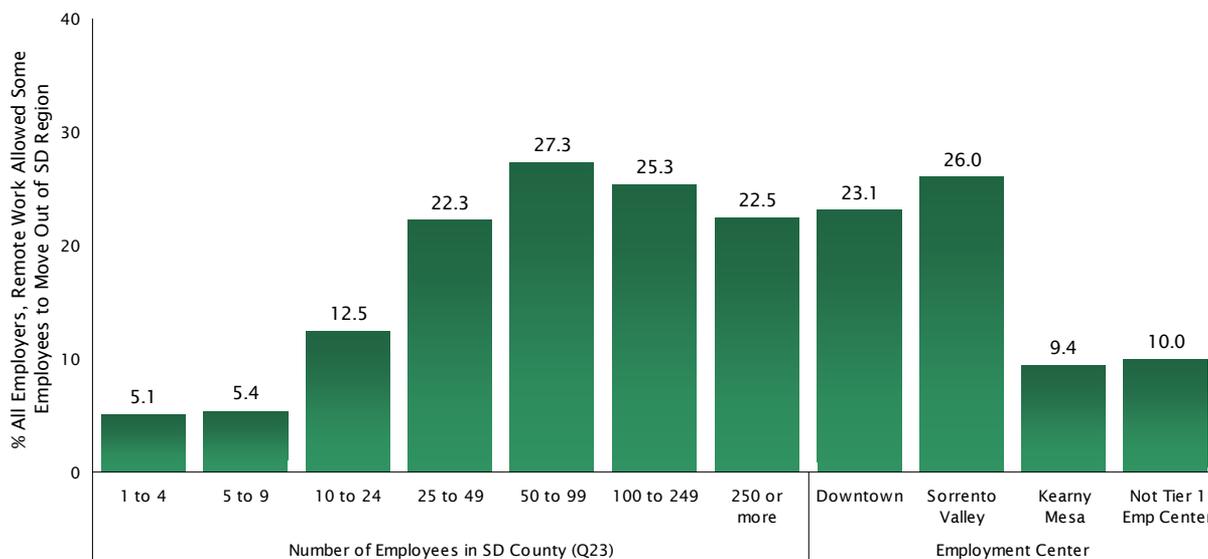


FIGURE 65 ALLOWED EMPLOYEES TO MOVE AWAY & KEEP THEIR JOB BY TELEWORKING BY NUMBER OF EMPLOYEES IN SD COUNTY & EMPLOYMENT CENTER



NEW HIRE RELOCATION POLICY In addition to allowing existing employees to move away from the San Diego region and work remotely, the survey inquired as to whether local businesses have 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 have hired employees outside the San Diego region to work remotely without requiring them to relocate (see Figure 66). 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 67-69).

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

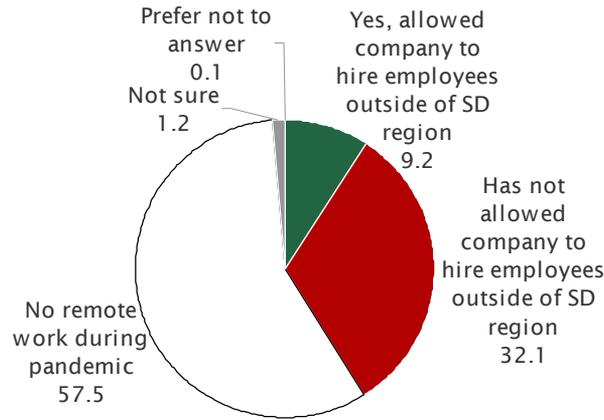


FIGURE 67 COMPANY HIRED OUT OF STATE EMPLOYEES TO WORK FROM HOME AND NOT RELOCATE TO SD BY INDUSTRY

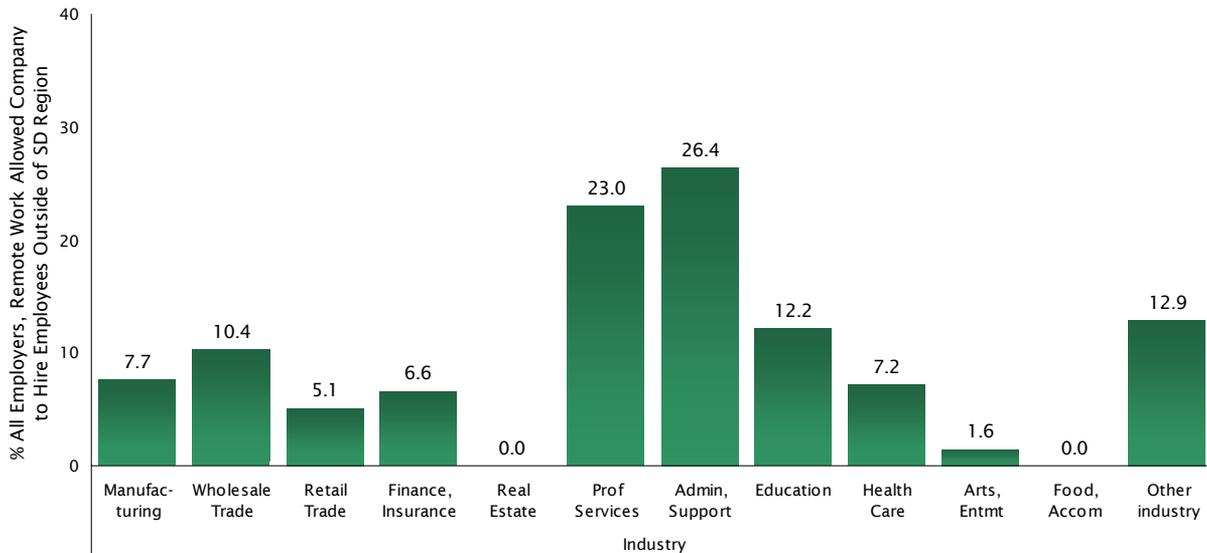


FIGURE 68 COMPANY HIRED OUT OF STATE EMPLOYEES TO WORK FROM HOME AND NOT RELOCATE TO SD BY NUMBER OF EMPLOYEES AT LOCATION & TIER 1 EMPLOYMENT CENTER

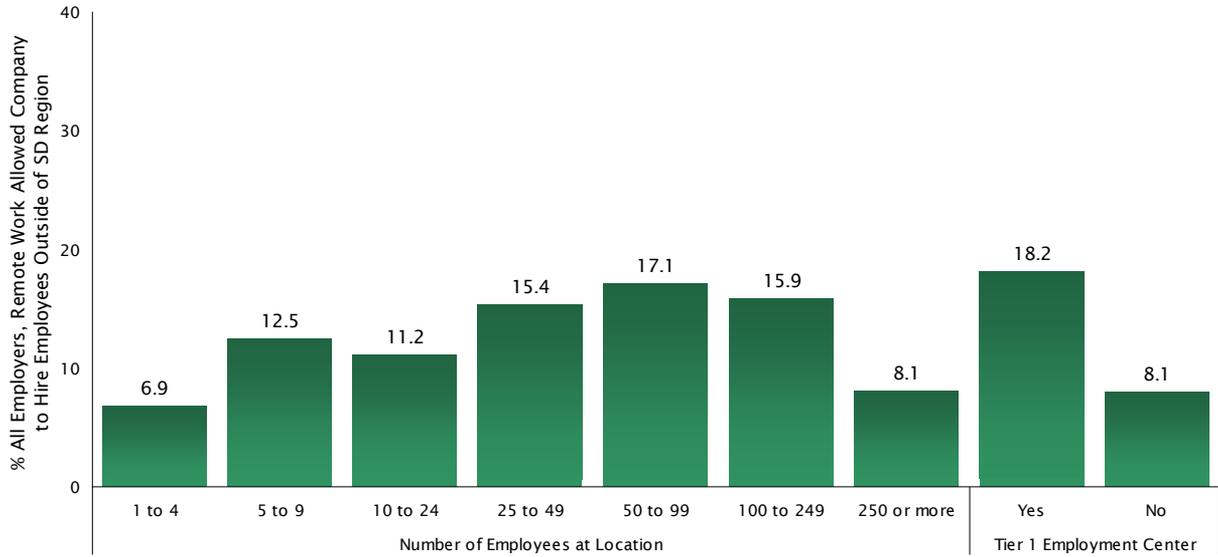
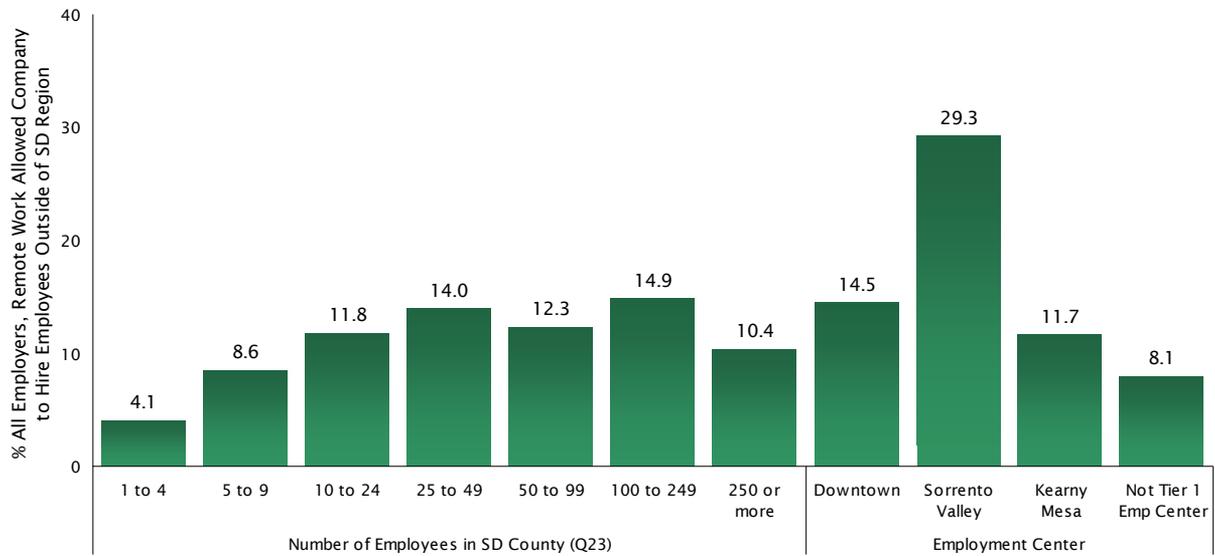


FIGURE 69 COMPANY HIRED OUT OF STATE EMPLOYEES TO WORK FROM HOME AND NOT RELOCATE TO SD BY NUMBER OF EMPLOYEES IN SD COUNTY & EMPLOYMENT CENTER



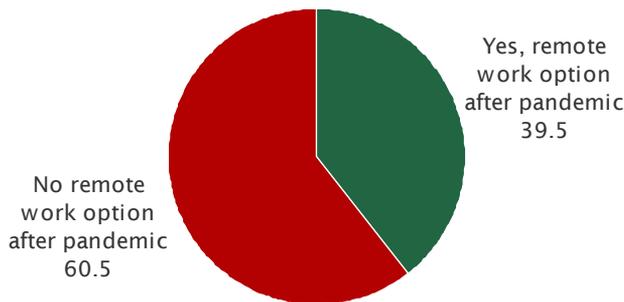
BUSINESSES: POST-PANDEMIC PLANS

The final substantive section of the 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 they currently (during the pandemic) provide the option to work from home to at least some of their employees (see Figure 37 on page 25). When asked 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 70).

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 70 EMPLOYEES WILL HAVE AN OPTION TO WORK FROM HOME AT LEAST 1 DAY PER WEEK AFTER PANDEMIC



When compared to their current levels (see Figures 38-40), 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 71-73).

FIGURE 71 EMPLOYEES WILL HAVE AN OPTION TO WORK FROM HOME AT LEAST 1 DAY PER WEEK AFTER PANDEMIC BY INDUSTRY

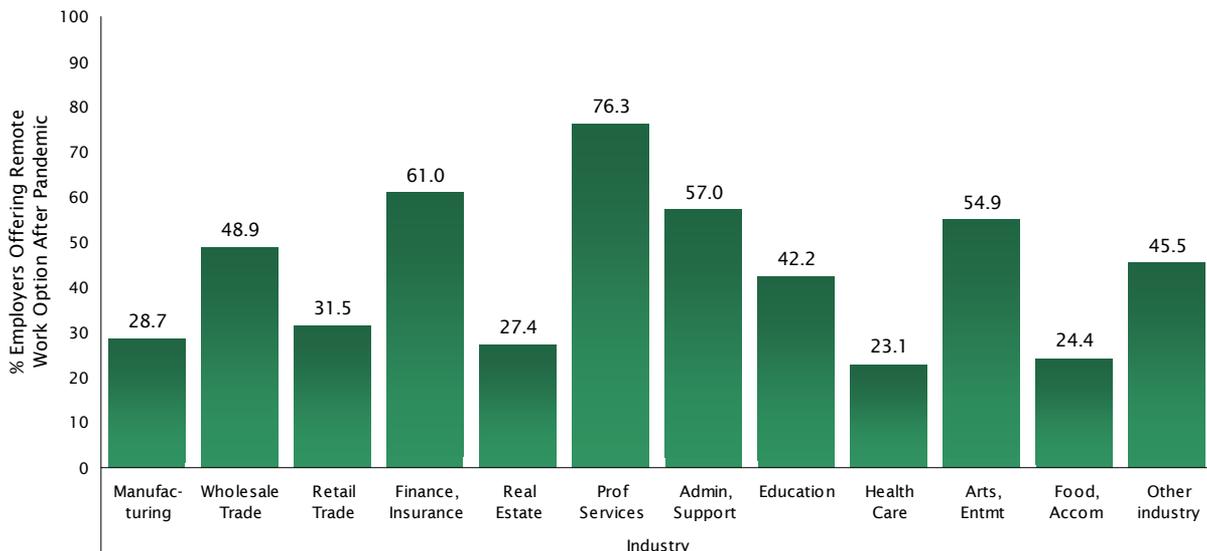


FIGURE 72 EMPLOYEES WILL HAVE AN OPTION TO WORK FROM HOME AT LEAST 1 DAY PER WEEK AFTER PANDEMIC BY NUMBER OF EMPLOYEES AT LOCATION, TIER 1 EMPLOYMENT CENTER & REMOTE WORK OPTION BEFORE PANDEMIC

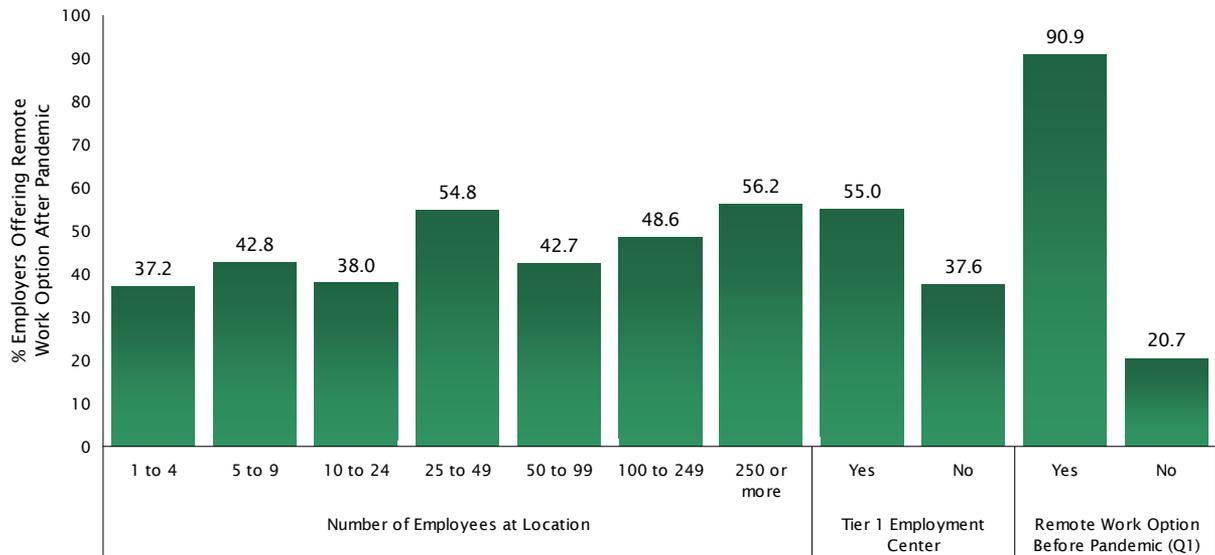
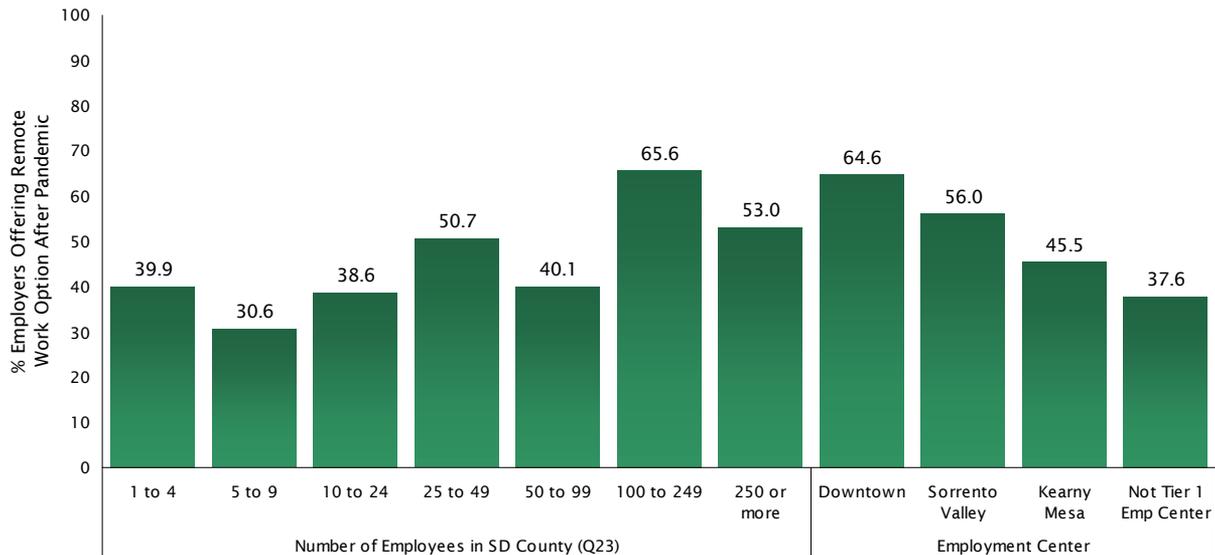


FIGURE 73 EMPLOYEES WILL HAVE AN OPTION TO WORK FROM HOME AT LEAST 1 DAY PER WEEK AFTER PANDEMIC BY NUMBER OF EMPLOYEES IN SD COUNTY & EMPLOYMENT CENTER

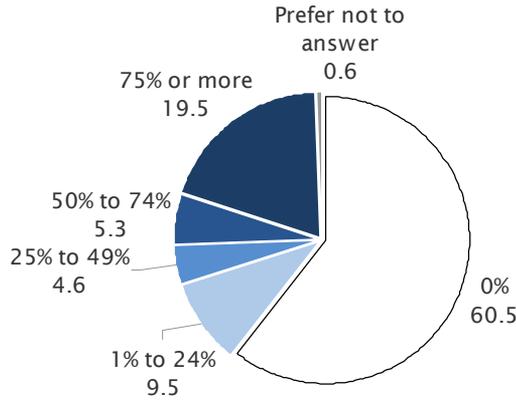


PERCENTAGE OF EMPLOYEES EXPECTED WITH REMOTE WORK OPTION

Businesses that indicated they expect 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 do *not* expect to offer a remote work option, while the remainder were split between those who expect 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 expect to provide a remote work option to at least three-quarters of their employees during the post-pandemic period is 7% lower than the current level of 27%, but 6% higher than pre-pandemic levels.

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 74 PERCENTAGE OF EMPLOYEES WHO WILL HAVE AN OPTION TO WORK FROM HOME AT LEAST 1 DAY PER WEEK AFTER PANDEMIC



Although some businesses in all categories (industry, size, location) reported that they expected fewer employees to be provided the option to work remotely after the pandemic is over, the largest 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 42-44 with Figures 75-77).

FIGURE 75 PERCENTAGE OF EMPLOYEES WHO WILL HAVE AN OPTION TO WORK FROM HOME AT LEAST 1 DAY PER WEEK AFTER PANDEMIC BY OVERALL & INDUSTRY

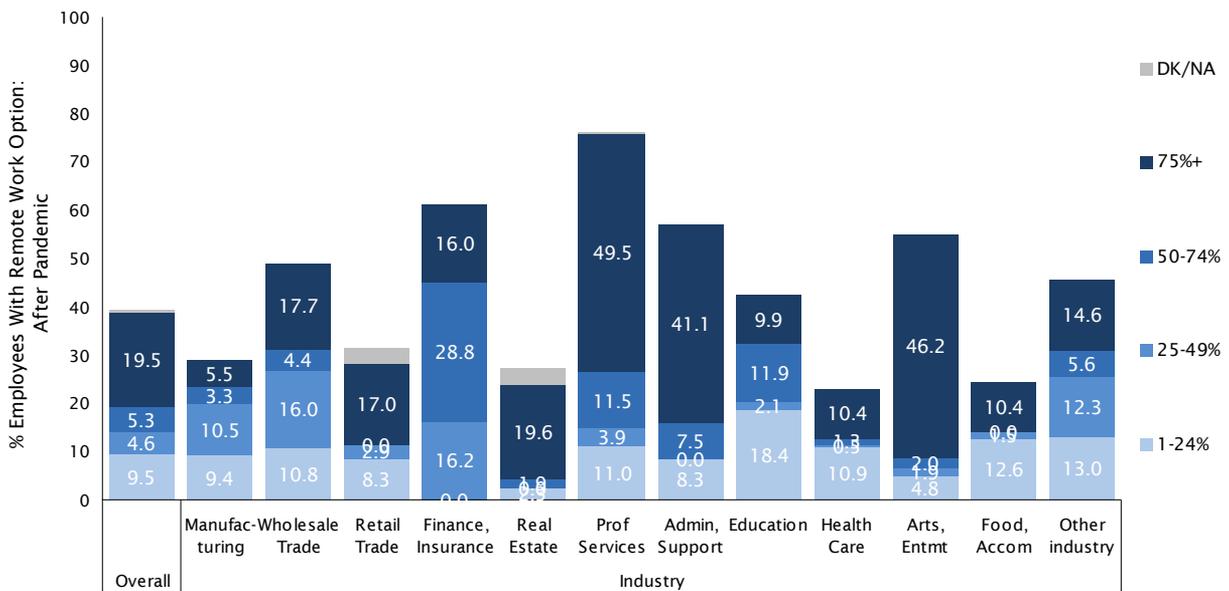


FIGURE 76 PERCENTAGE OF EMPLOYEES WHO WILL HAVE AN OPTION TO WORK FROM HOME AT LEAST 1 DAY PER WEEK AFTER PANDEMIC BY NUMBER OF EMPLOYEES AT LOCATION & TIER 1 EMPLOYMENT CENTER

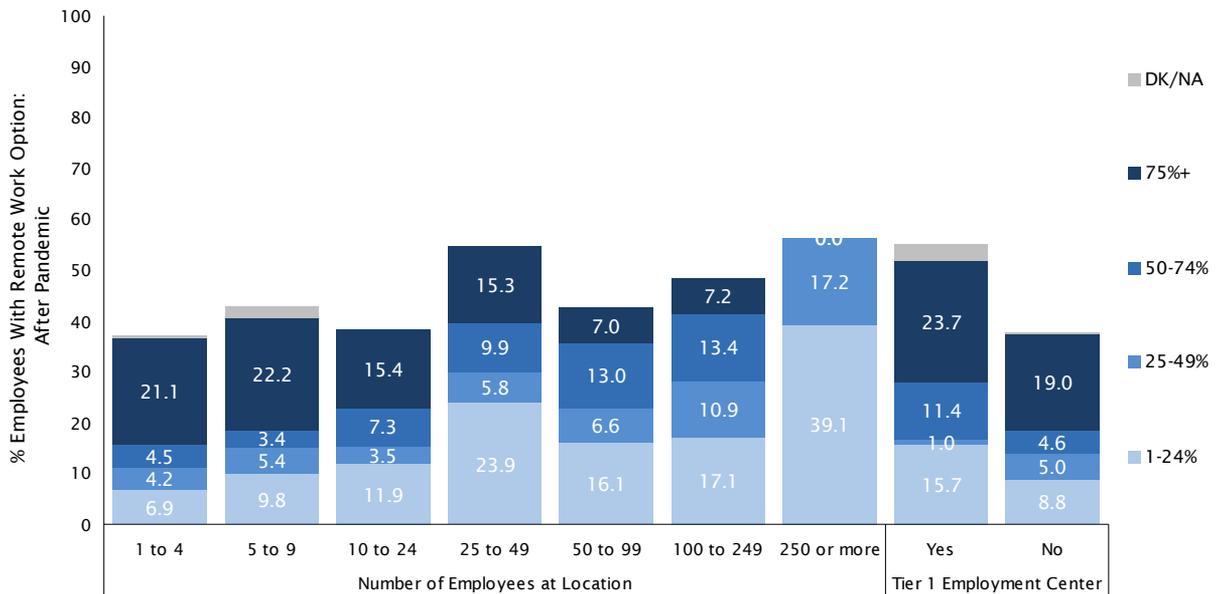
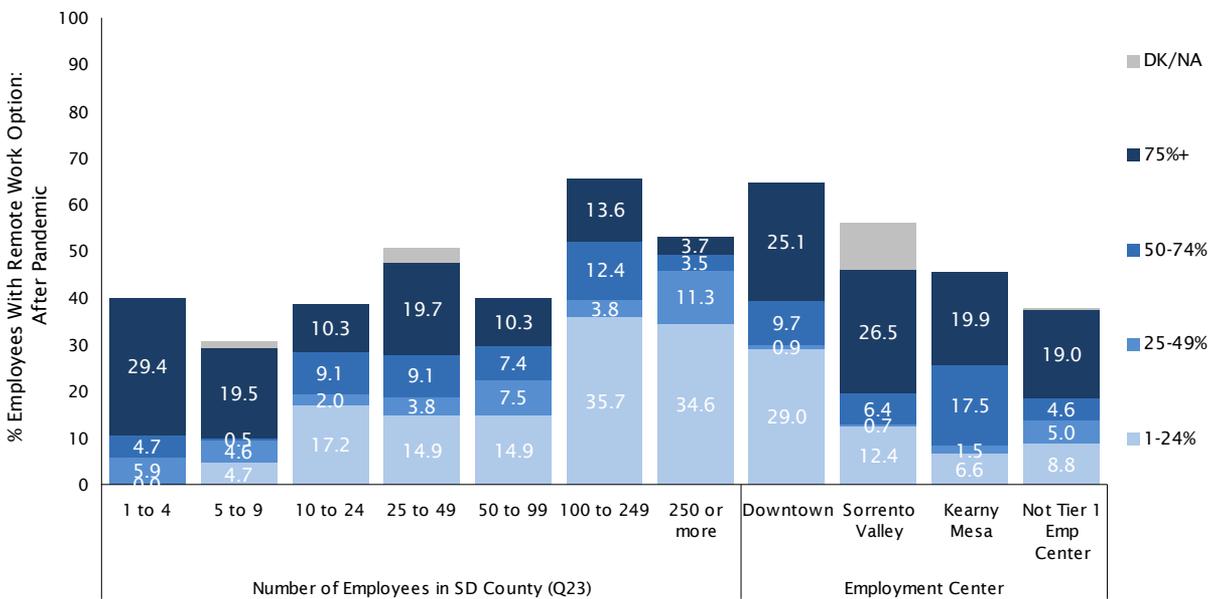


FIGURE 77 PERCENTAGE OF EMPLOYEES WHO WILL HAVE AN OPTION TO WORK FROM HOME AT LEAST 1 DAY PER WEEK AFTER PANDEMIC BY NUMBER OF EMPLOYEES IN SD COUNTY & EMPLOYMENT CENTER



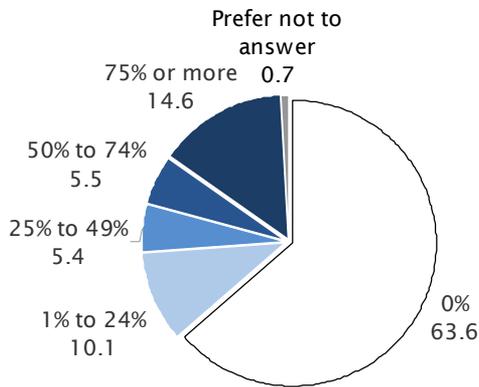
PERCENTAGE OF EMPLOYEES TO WORK REMOTELY 1+ DAYS PER WEEK

Although 39% of businesses indicated they expect 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 78) was slightly lower (36%). Approximately 15% of businesses expected that 75% or more of their employees will 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 current patterns (see Figure 45 on page 29) with post-pandemic expectations (Figure 78), the category with the largest shift is businesses with 75% or more of their workforce working remotely one or more days per week (-7%).

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 78 PERCENTAGE OF EMPLOYEES EXPECTED TO WORK FROM HOME AT LEAST 1 DAY PER WEEK AFTER PANDEMIC



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 79-81). It's also worth noting that when compared to current patterns (see Figures 46-48), 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 79-81).

FIGURE 79 PERCENTAGE OF EMPLOYEES EXPECTED TO WORK FROM HOME AT LEAST 1 DAY PER WEEK AFTER PANDEMIC BY OVERALL & INDUSTRY

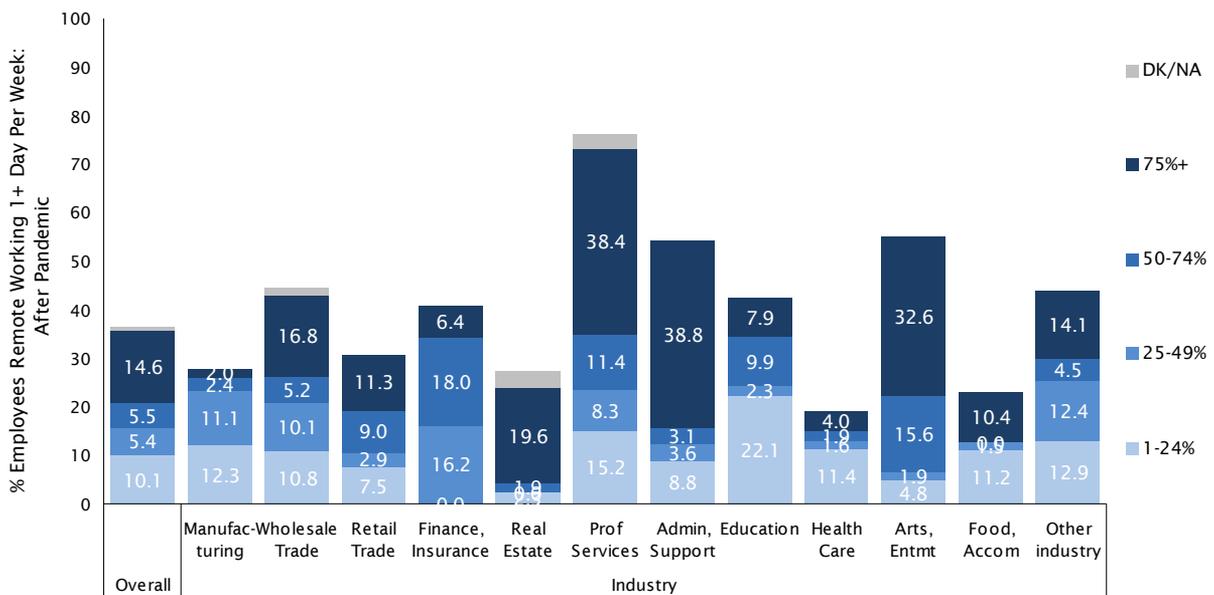


FIGURE 80 PERCENTAGE OF EMPLOYEES EXPECTED TO WORK FROM HOME AT LEAST 1 DAY PER WEEK AFTER PANDEMIC BY NUMBER OF EMPLOYEES AT LOCATION & TIER 1 EMPLOYMENT CENTER

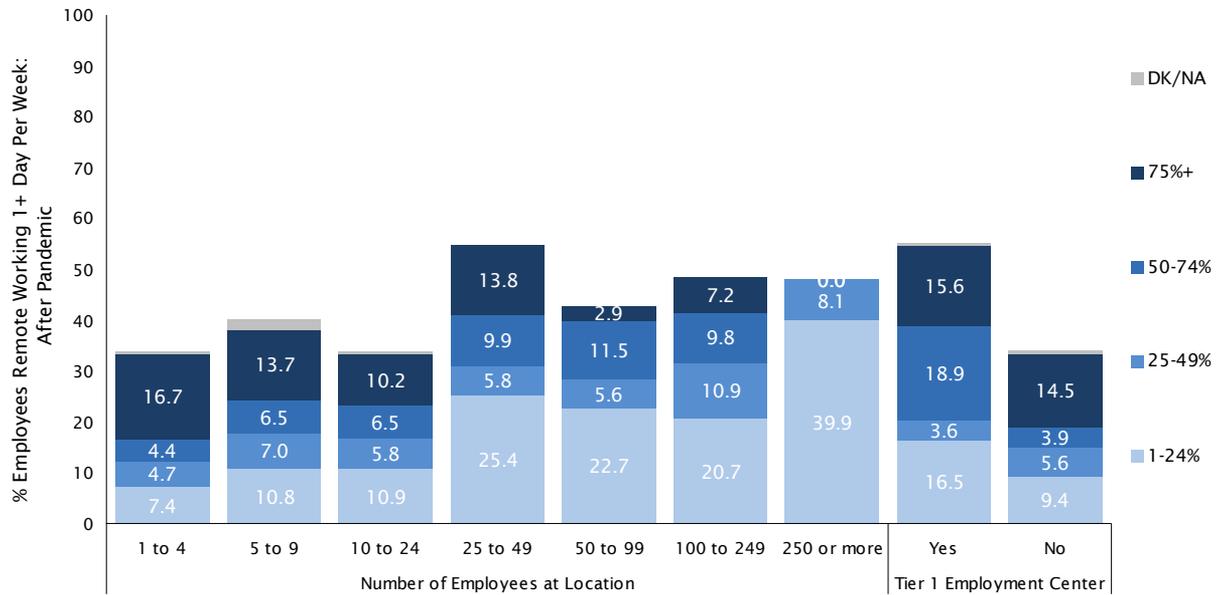
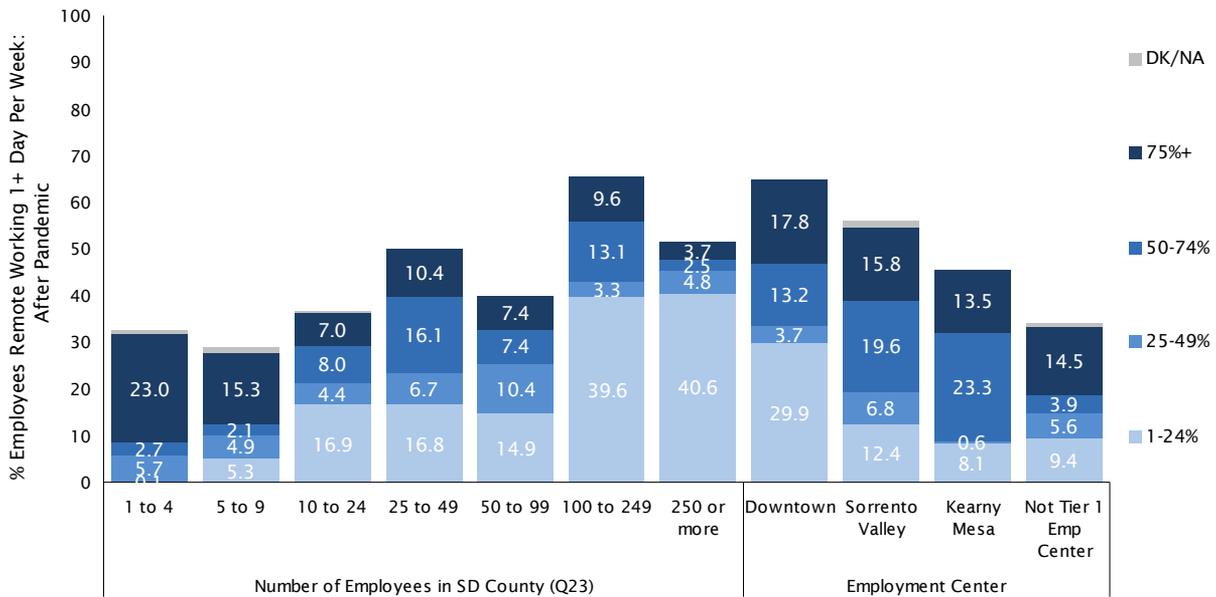


FIGURE 81 PERCENTAGE OF EMPLOYEES EXPECTED TO WORK FROM HOME AT LEAST 1 DAY PER WEEK AFTER PANDEMIC BY NUMBER OF EMPLOYEES IN SD COUNTY & EMPLOYMENT CENTER

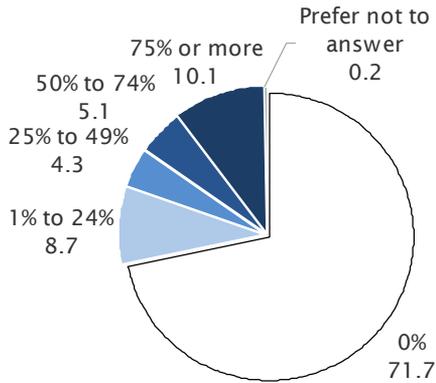


PERCENTAGE OF EMPLOYEES TO WORK REMOTELY 3+ DAYS PER WEEK

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 82). At the other end of the spectrum, 10% of businesses indicated they expect 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.

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 82 PERCENTAGE OF EMPLOYEES EXPECTED TO WORK FROM HOME MOST OF THE TIME AFTER PANDEMIC



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 83-85). 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* reported 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 50-52 with Figures 83-85).

FIGURE 83 PERCENTAGE OF EMPLOYEES EXPECTED TO WORK FROM HOME MOST OF THE TIME AFTER PANDEMIC BY OVERALL & INDUSTRY

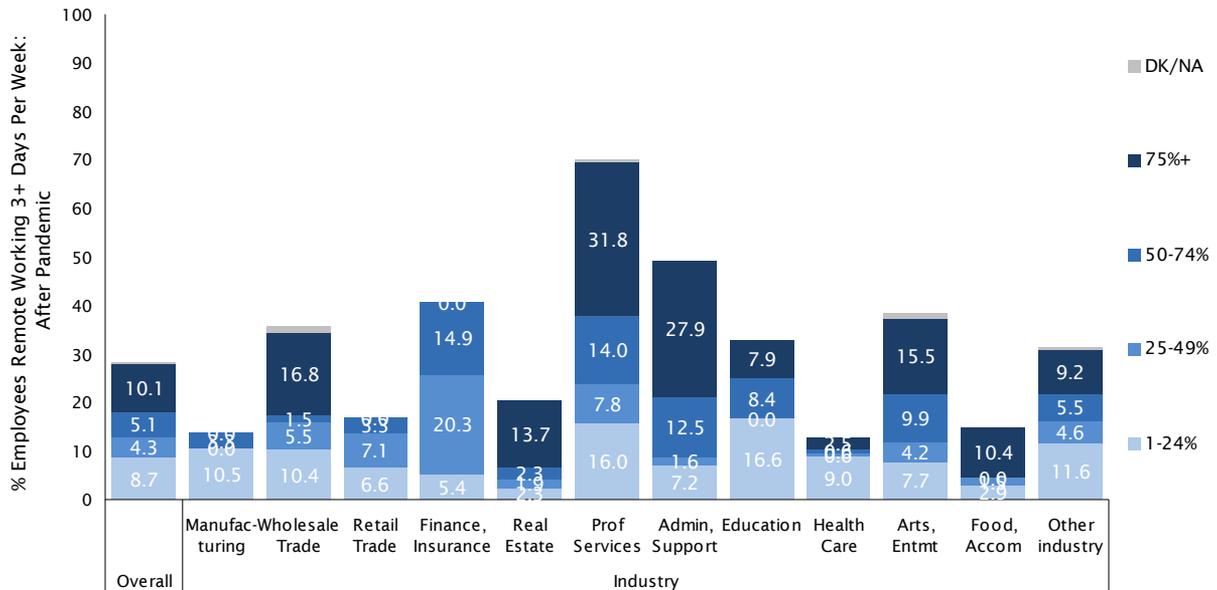


FIGURE 84 PERCENTAGE OF EMPLOYEES EXPECTED TO WORK FROM HOME MOST OF THE TIME AFTER PANDEMIC BY NUMBER OF EMPLOYEES AT LOCATION & TIER 1 EMPLOYMENT CENTER

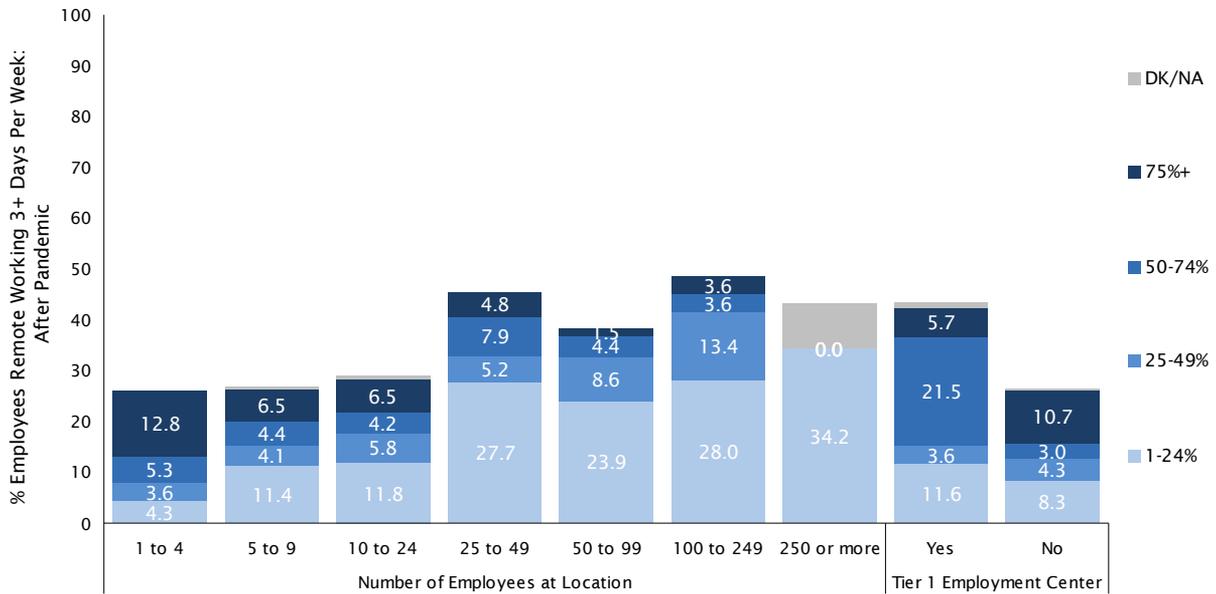
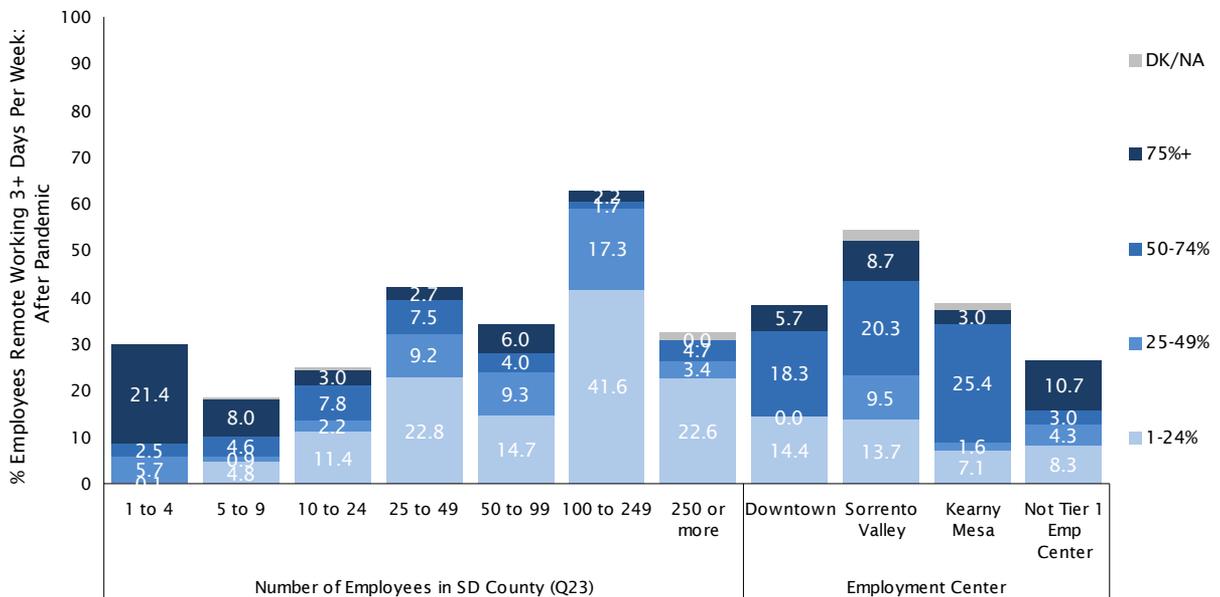


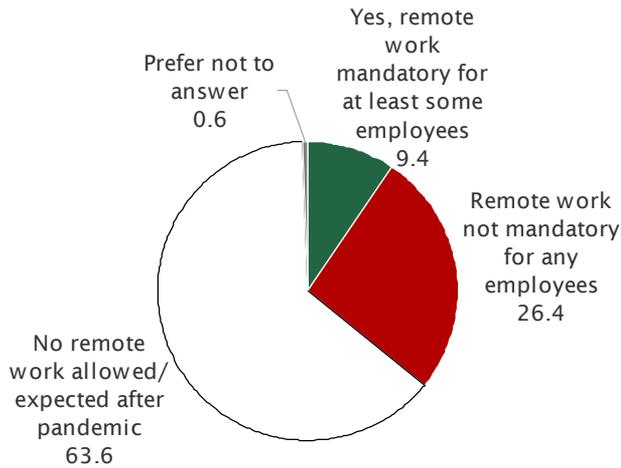
FIGURE 85 PERCENTAGE OF EMPLOYEES EXPECTED TO WORK FROM HOME MOST OF THE TIME AFTER PANDEMIC BY NUMBER OF EMPLOYEES IN SD COUNTY & EMPLOYMENT CENTER



WILL REMOTE WORK BE MANDATORY FOR SOME EMPLOYEES? The final substantive question of the 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%) indicated that remote work will be mandatory for a portion of their workforce (see Figure 86).

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 86 EMPLOYEES REQUIRED TO WORK FORM HOME AFTER PANDEMIC



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 to report that remote work will be mandatory for some employees during the post-pandemic period (Figures 87-89).

FIGURE 87 EMPLOYEES REQUIRED TO WORK FORM HOME AFTER PANDEMIC BY INDUSTRY

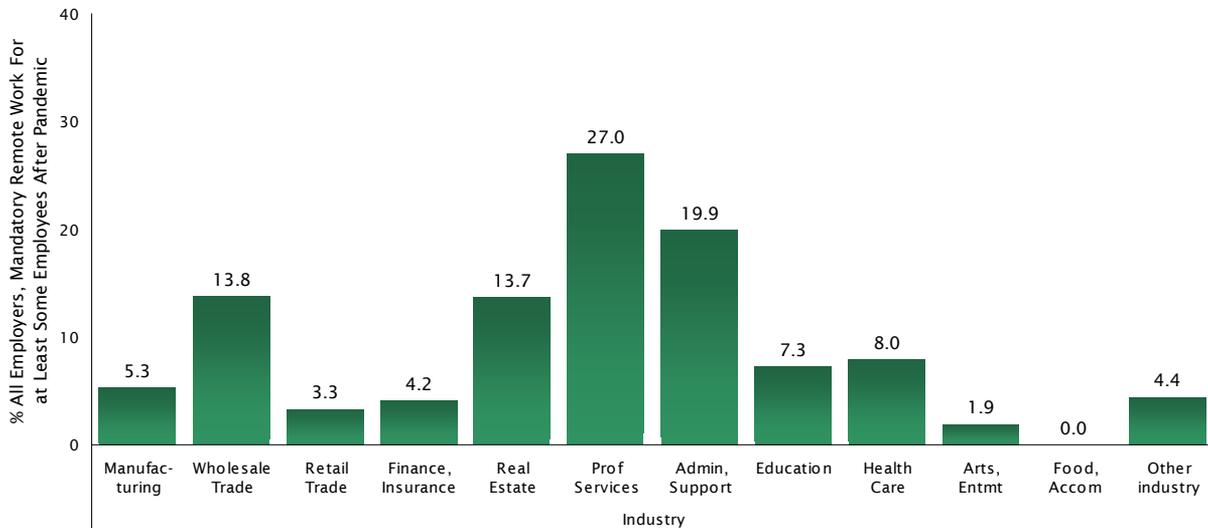


FIGURE 88 EMPLOYEES REQUIRED TO WORK FROM HOME AFTER PANDEMIC BY NUMBER OF EMPLOYEES AT LOCATION, TIER 1 EMPLOYMENT CENTER & REMOTE WORK OPTION BEFORE PANDEMIC

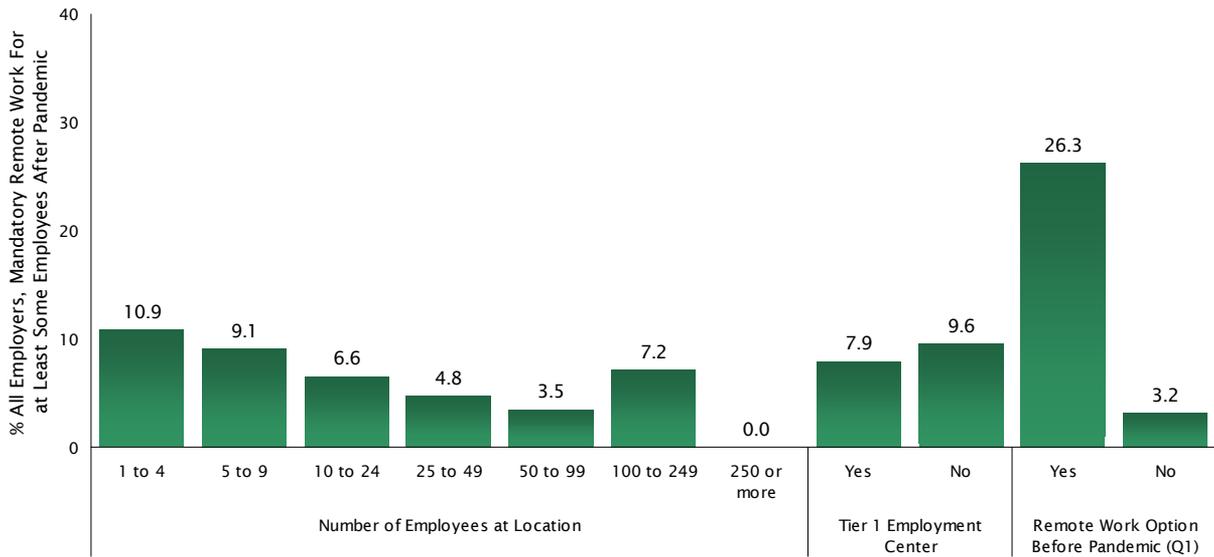
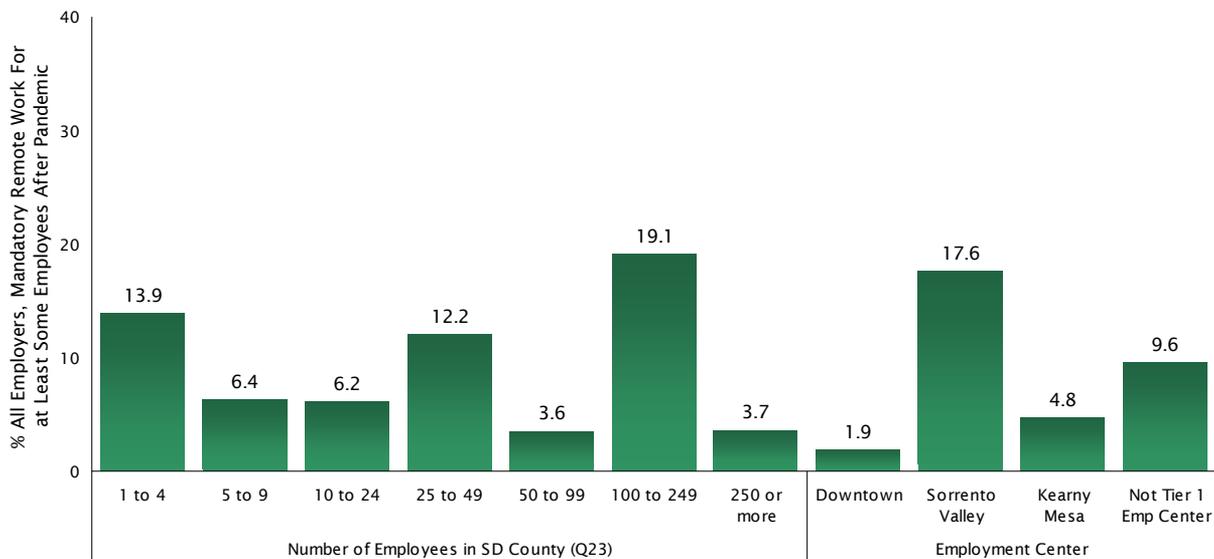


FIGURE 89 EMPLOYEES REQUIRED TO WORK FROM HOME AFTER PANDEMIC BY NUMBER OF EMPLOYEES IN SD COUNTY & EMPLOYMENT CENTER



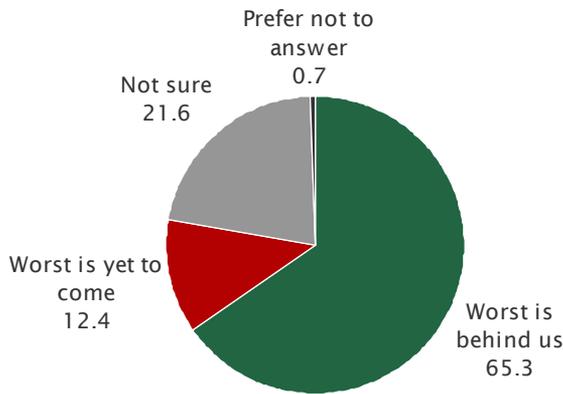
EMPLOYEES: VIEWS ON PANDEMIC

Having detailed the results of the Business Survey, beginning with this section the report shifts to documenting the results of the Employee Survey. As a way of orienting the respondent and spurring their interest in study, the first substantive question of the Employee Survey addressed their expectations regarding the pandemic in San Diego County. Is the worst behind us, or is the worst yet to come?

EXPECTATIONS FOR PANDEMIC As shown in Figure 90, nearly two-thirds of employees (65%) were optimistic about the trajectory of the pandemic, feeling that the worst is behind us in San Diego County. Approximately 12% anticipated that the worst of the pandemic lies ahead, while 22% confided that they weren't sure.

Question 2 Which comes closer to your view about where San Diego County stands in the coronavirus pandemic: the worst is behind us OR the worst is yet to come?

FIGURE 90 OPINION ABOUT PANDEMIC IN SAN DIEGO COUNTY



Figures 91-93 show how expectations about the pandemic varied by length of residence in San Diego County, age, ethnicity, household income, subregion of residence, the language in which the survey was administered, and gender. Although all subgroups were generally optimistic about the pandemic's trajectory, respondents of other/mixed ethnicities, 45 to 54 years in age, those from lower-income households, individuals living in South County, and respondents who completed the survey in Spanish were noticeably less optimistic than their counterparts.

FIGURE 91 OPINION ABOUT PANDEMIC IN SAN DIEGO COUNTY BY YEARS IN SAN DIEGO COUNTY & AGE

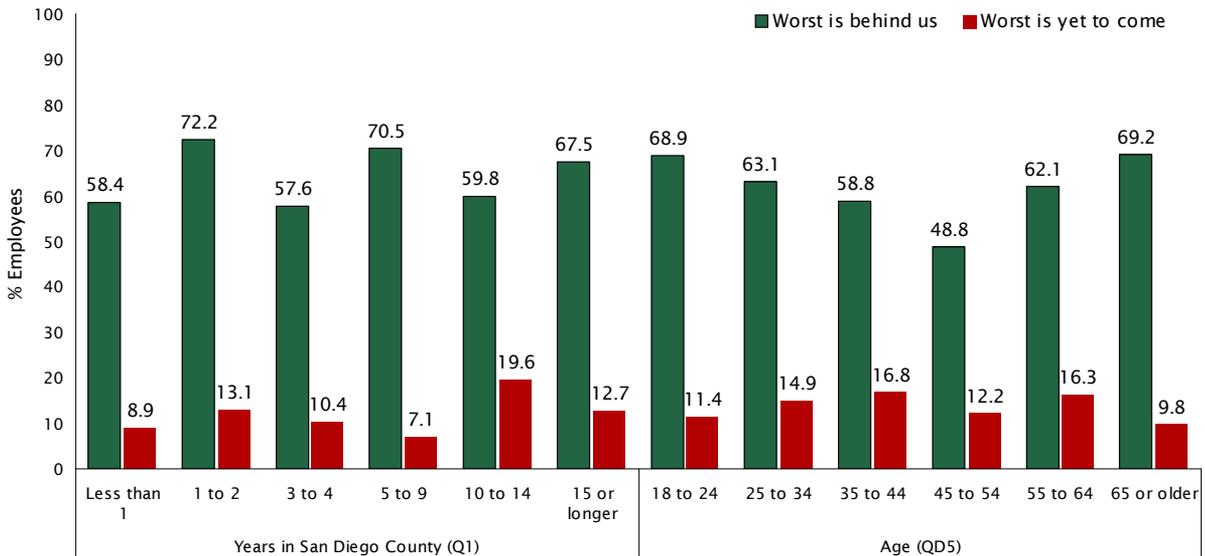


FIGURE 92 OPINION ABOUT PANDEMIC IN SAN DIEGO COUNTY BY ETHNICITY & HOUSEHOLD INCOME

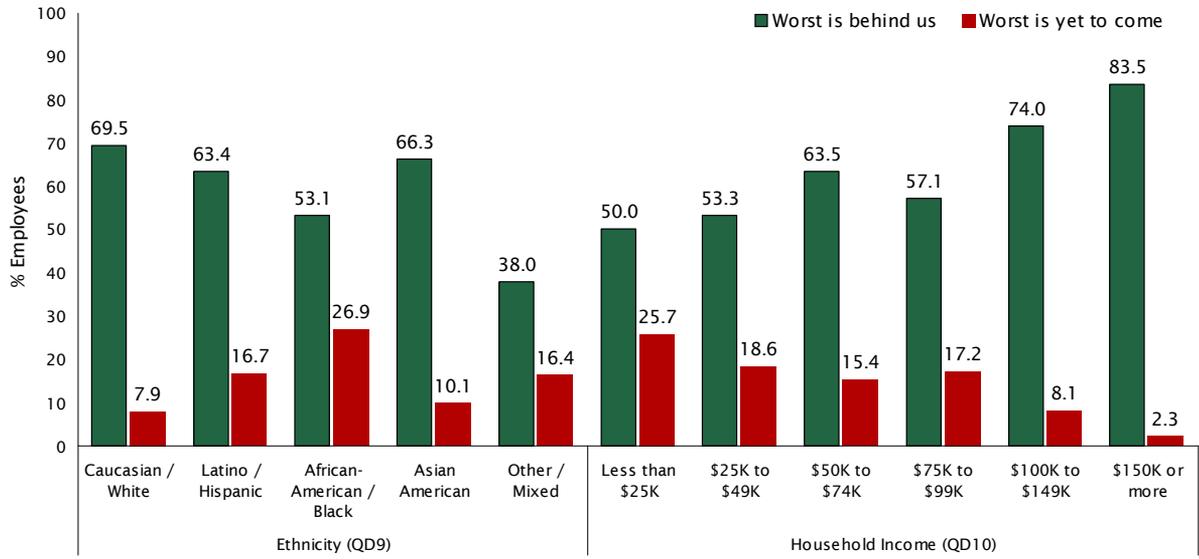
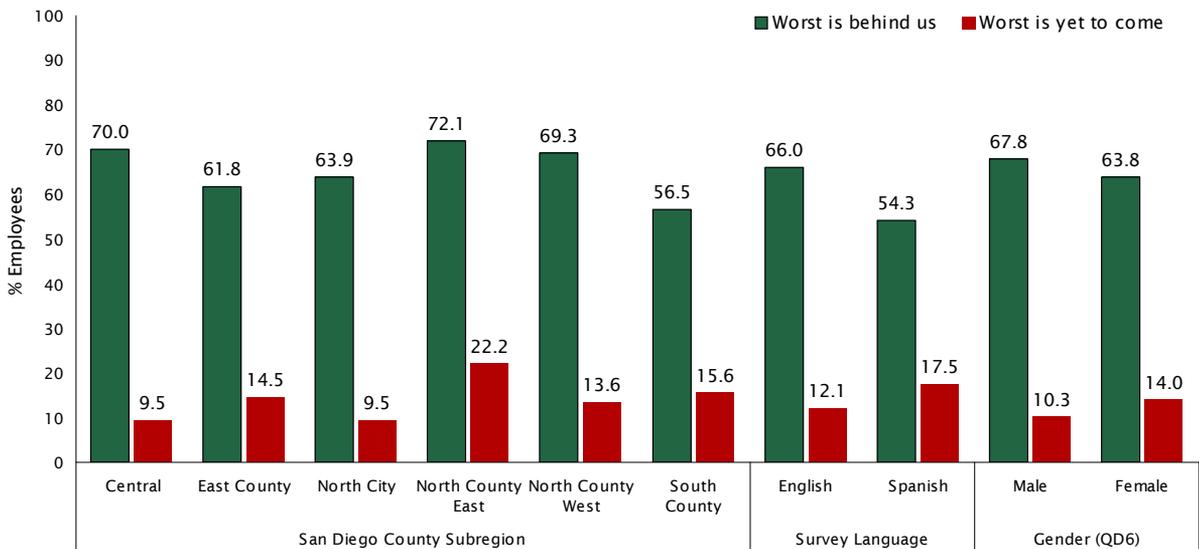


FIGURE 93 OPINION ABOUT PANDEMIC IN SAN DIEGO COUNTY BY SAN DIEGO COUNTY SUBREGION, SURVEY LANGUAGE & GENDER



EMPLOYEES: PRE-PANDEMIC

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

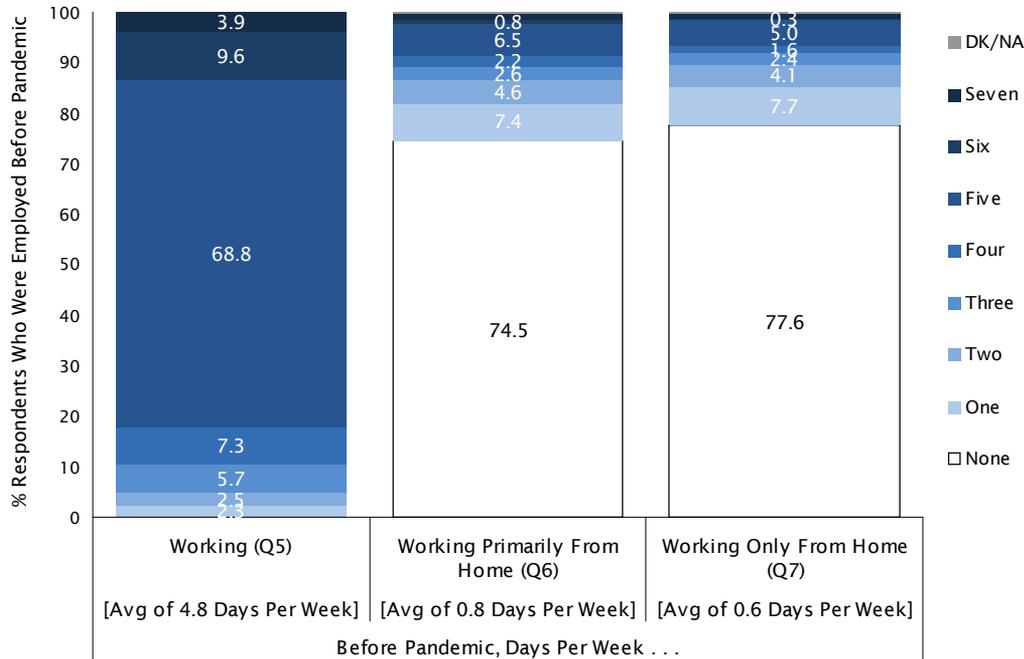
WORK DAYS & REMOTE WORK PATTERNS After being screened to confirm they are *currently* employed, all respondents were asked to describe their work arrangements before the pandemic started in terms of days worked, days they primarily worked from home, and split days (primarily worked from home, but *also* commuted to a separate work site) during a typical week. Figure 94 summarizes the findings of all three questions among respondents who were employed prior to the pandemic.¹¹

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

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?

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 94 WORK DAYS AND LOCATION BEFORE PANDEMIC, PER WEEK¹²



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

12. 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.

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 94, 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 95-98 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.

FIGURE 95 WORK DAYS AND LOCATION BEFORE PANDEMIC PER WEEK BY AGE, GENDER, INDEPENDENT CONTRACTOR & SURVEY LANGUAGE

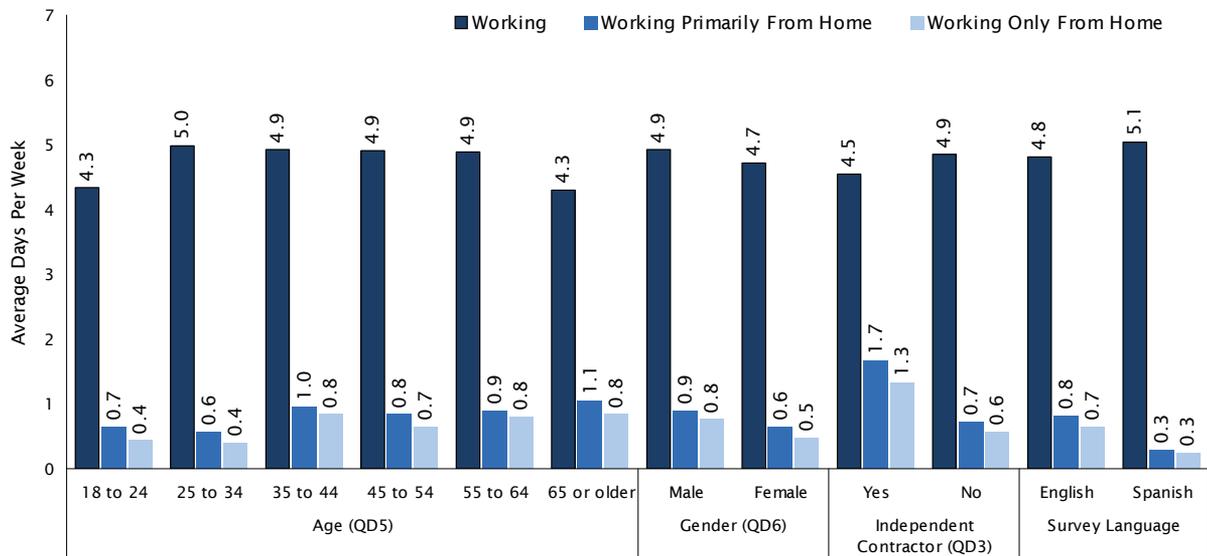


FIGURE 96 WORK DAYS AND LOCATION BEFORE PANDEMIC PER WEEK BY ETHNICITY & HOUSEHOLD INCOME

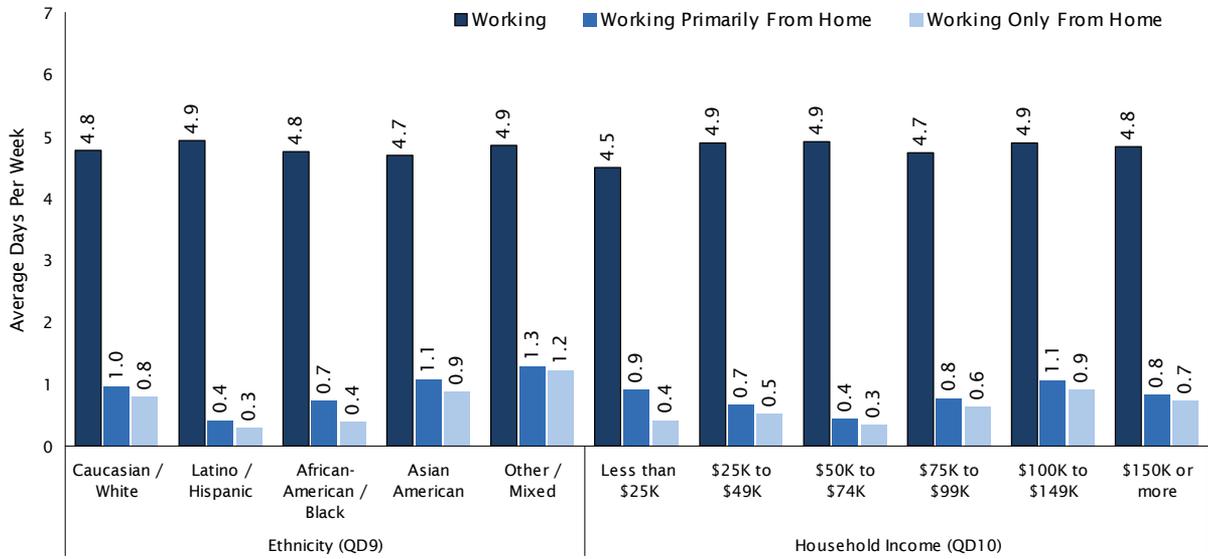


FIGURE 97 WORK DAYS AND LOCATION BEFORE PANDEMIC PER WEEK BY SAN DIEGO COUNTY SUBREGION & NUMBER OF EMPLOYEES AT COMPANY

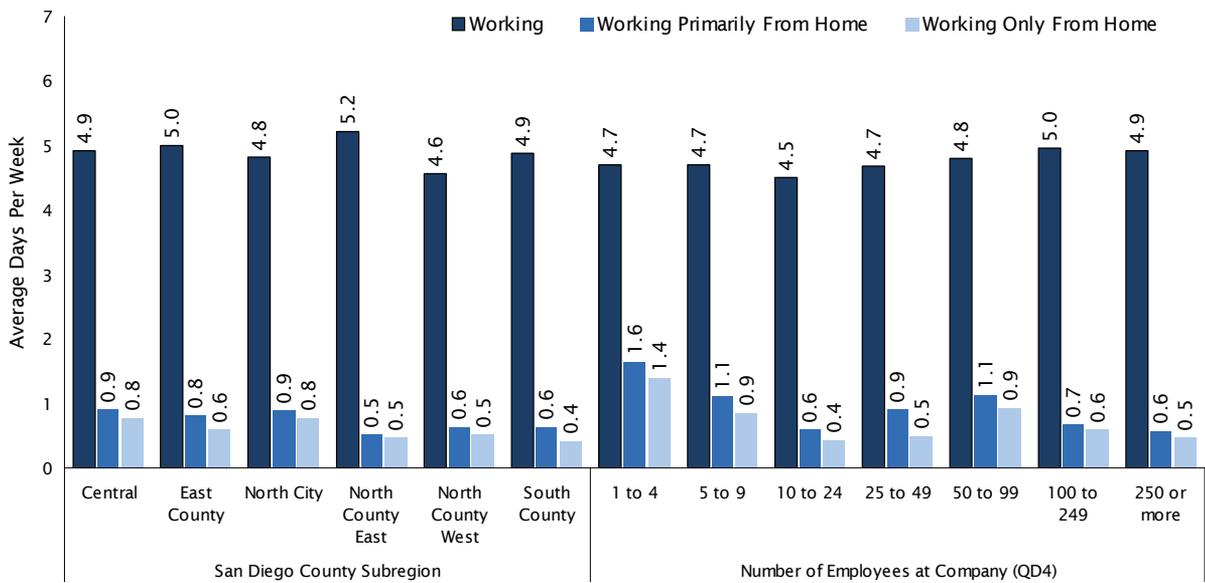


FIGURE 98 WORK DAYS AND LOCATION BEFORE PANDEMIC PER WEEK BY INDUSTRY¹³

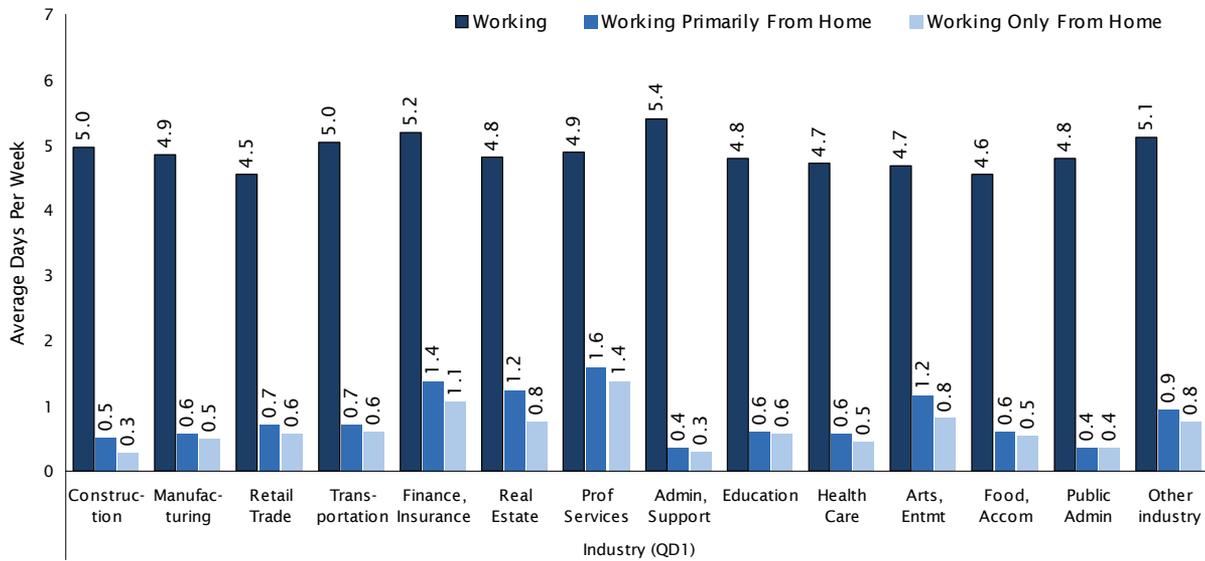
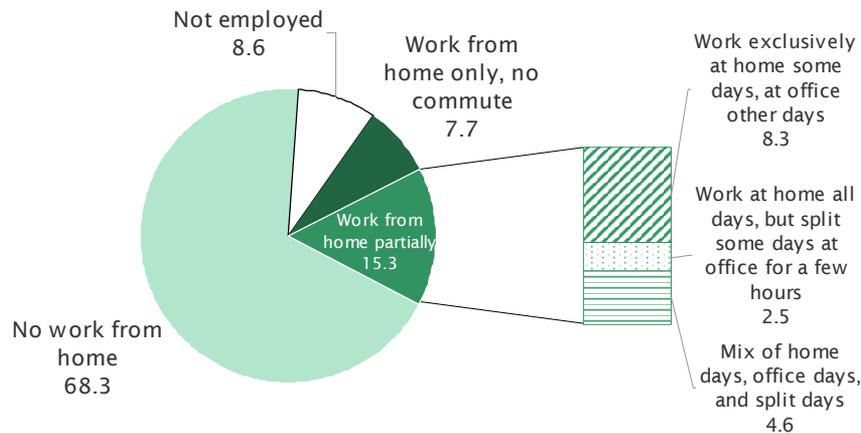


Figure 99 summarizes employees’ work patterns during the pre-pandemic period, documenting the percentage of employees who fit into specific work arrangement categories. Overall, 68% of employees surveyed indicated they did *not* work from home prior to the pandemic, 9% were unemployed in January and 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 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 100-103 show how various subgroups of employees were distributed among the main work arrangement categories, pre-pandemic.

FIGURE 99 REMOTE WORK STATUS BEFORE PANDEMIC



13. 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.

FIGURE 100 REMOTE WORK STATUS BEFORE PANDEMIC BY AGE, GENDER, INDEPENDENT CONTRACTOR & SURVEY LANGUAGE

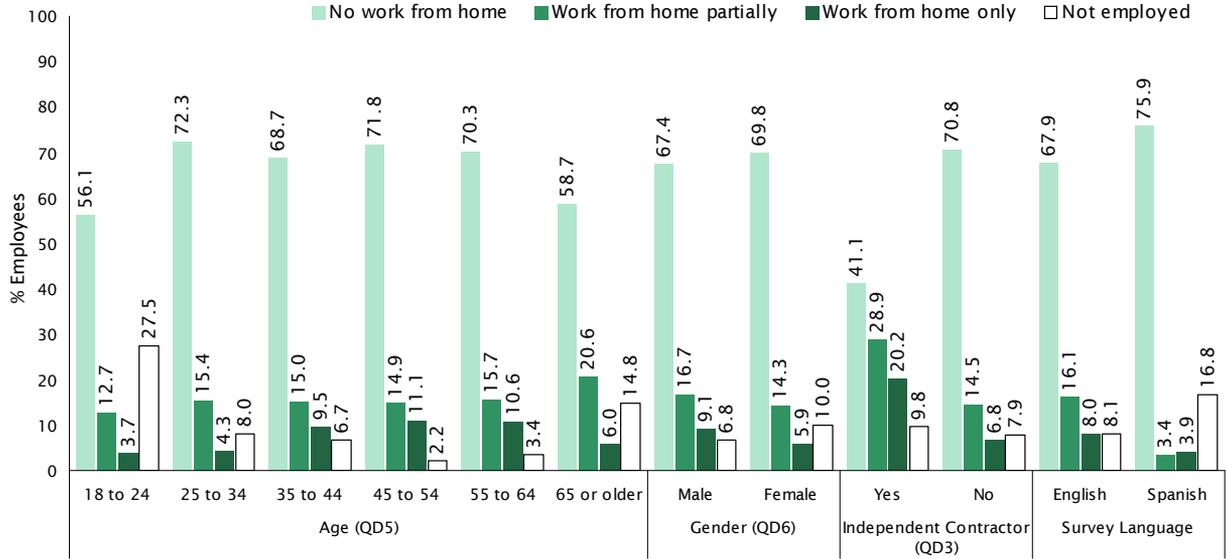


FIGURE 101 REMOTE WORK STATUS BEFORE PANDEMIC BY ETHNICITY & HOUSEHOLD INCOME

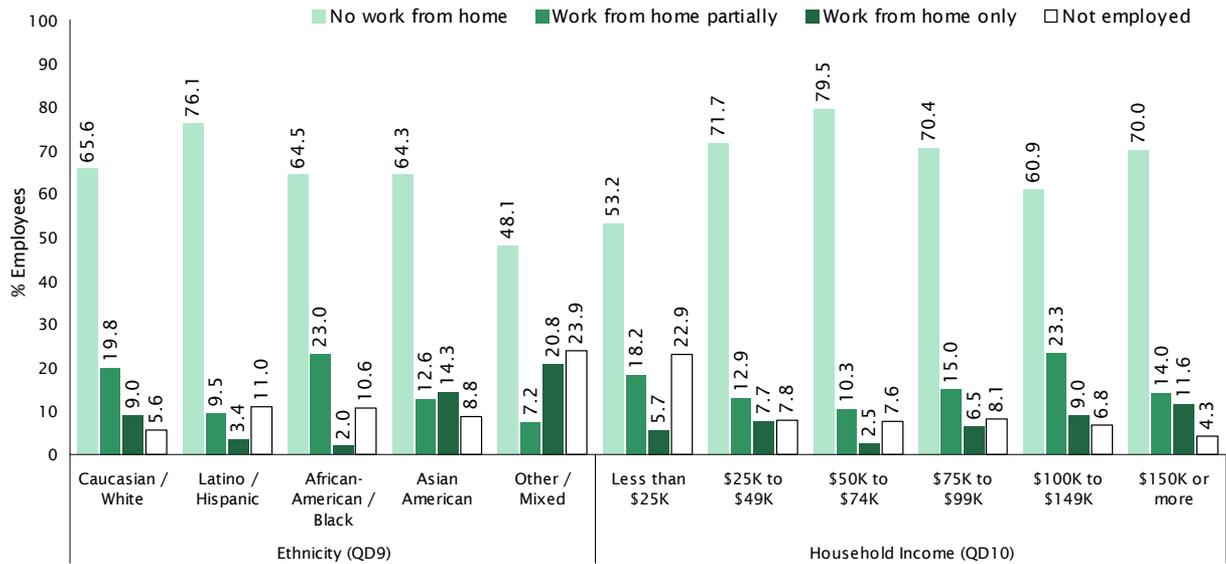


FIGURE 102 REMOTE WORK STATUS BEFORE PANDEMIC BY SAN DIEGO COUNTY SUBREGION & NUMBER OF EMPLOYEES AT COMPANY

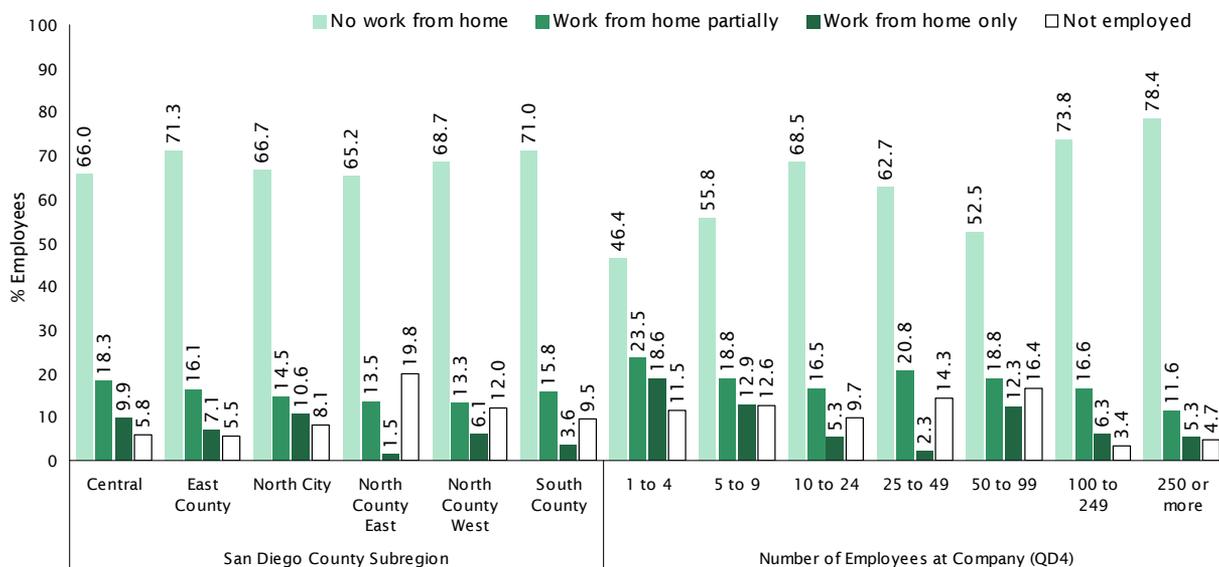
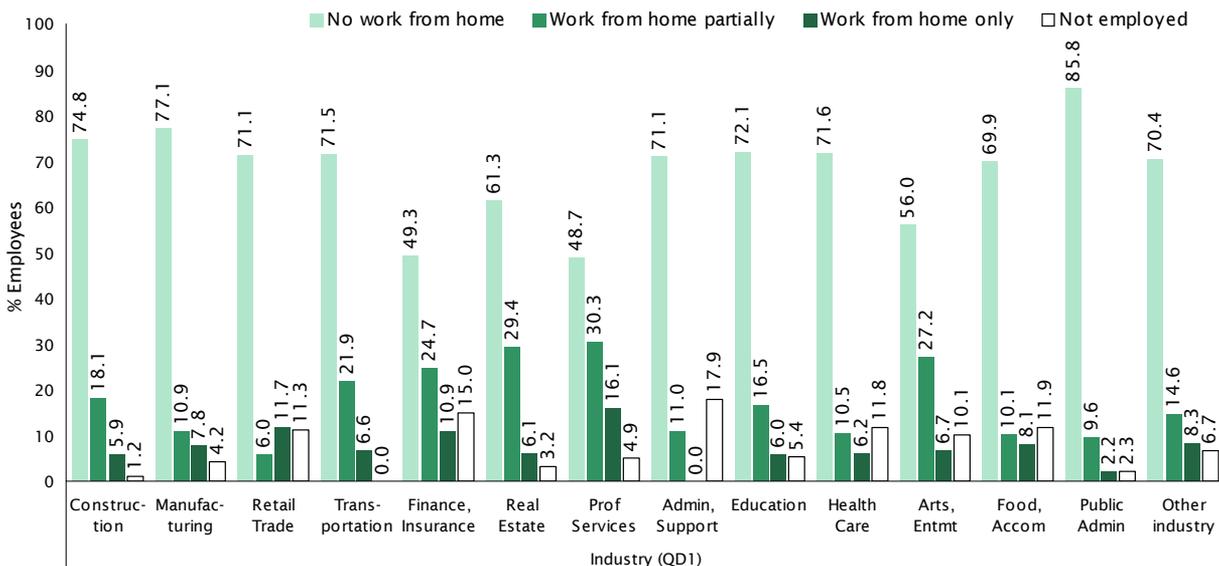


FIGURE 103 REMOTE WORK STATUS BEFORE PANDEMIC BY INDUSTRY



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 104). 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.

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 104 PRIMARY MODE OF TRANSPORTATION TO WORK PRIOR TO PANDEMIC

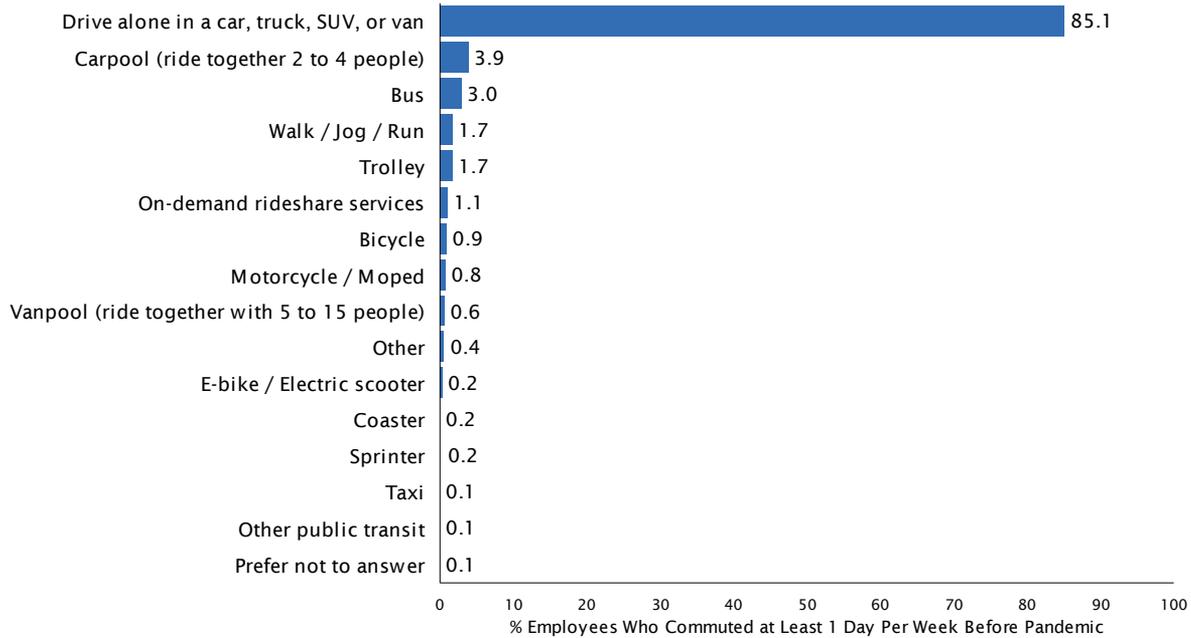
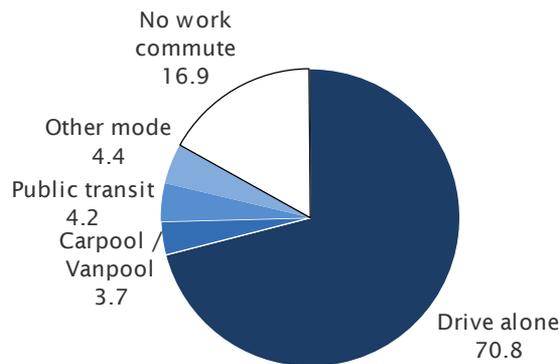


Figure 105 consolidates the various methods of commuting into general categories and places the results in context of all employees surveyed. Approximately 17% of employees indicated they did not commute to a separate work site prior to the pandemic,¹⁴ 71% primarily commuted by driving solo, whereas less than 5% primarily commuted by carpool/vanpool (4%), public transit (4%), or other mode (4%), respectively. Beginning on the next page, Figures 106-108 illustrate how pre-pandemic commute patterns and modes varied across subgroups of employees.

FIGURE 105 PRIMARY COMMUTE MODE BEFORE PANDEMIC



14. 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 106 PRIMARY COMMUTE MODE BEFORE PANDEMIC BY AGE, GENDER, INDEPENDENT CONTRACTOR & SURVEY LANGUAGE

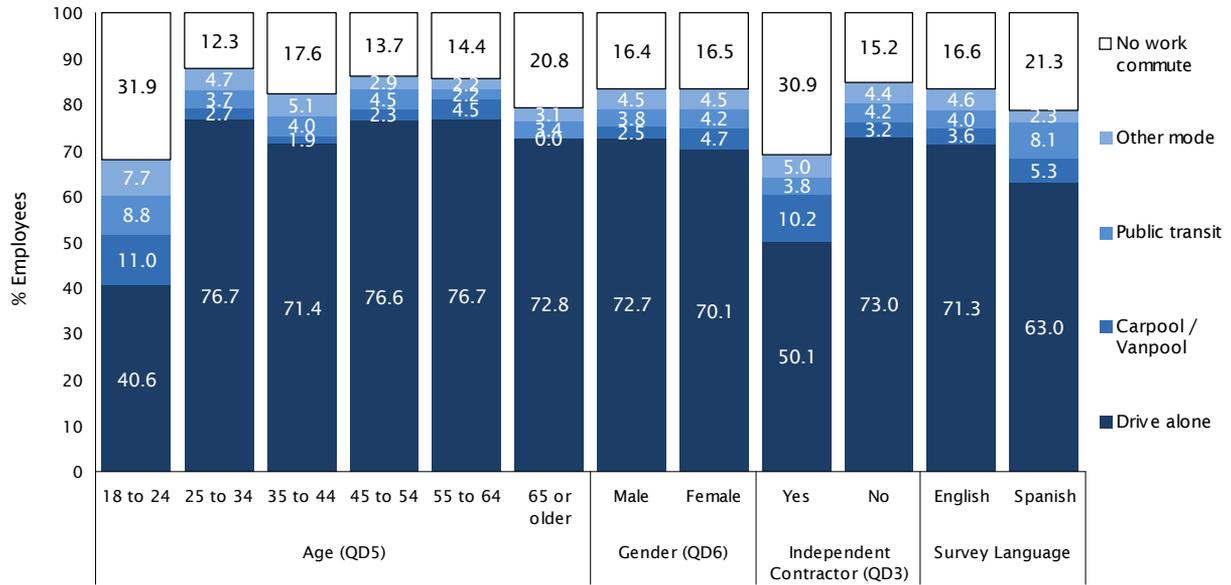


FIGURE 107 PRIMARY COMMUTE MODE BEFORE PANDEMIC BY ETHNICITY & HOUSEHOLD INCOME

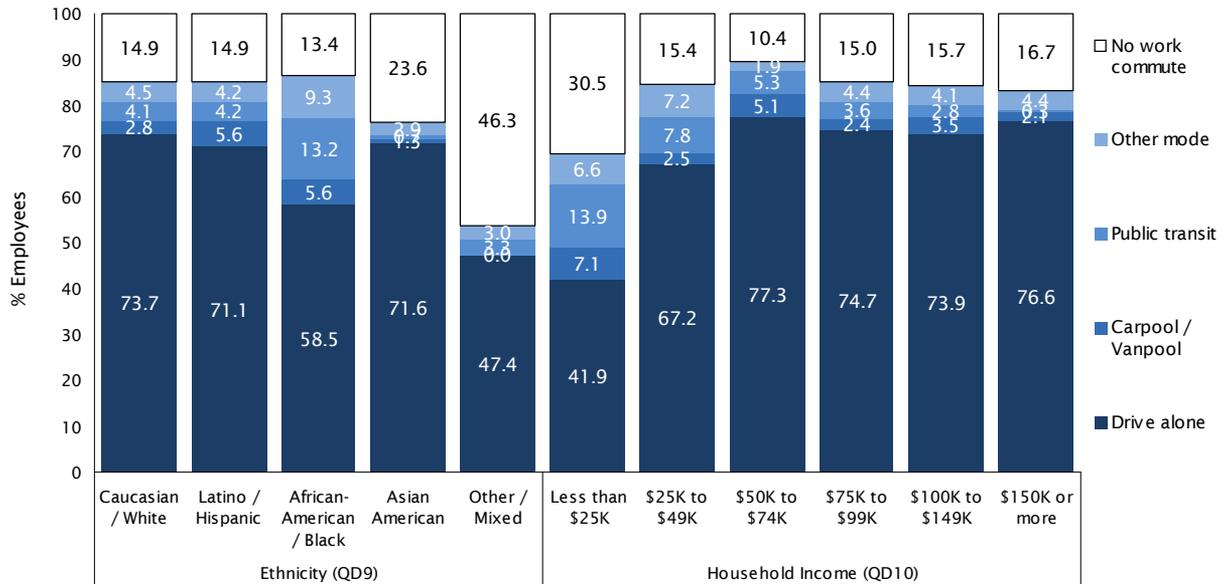
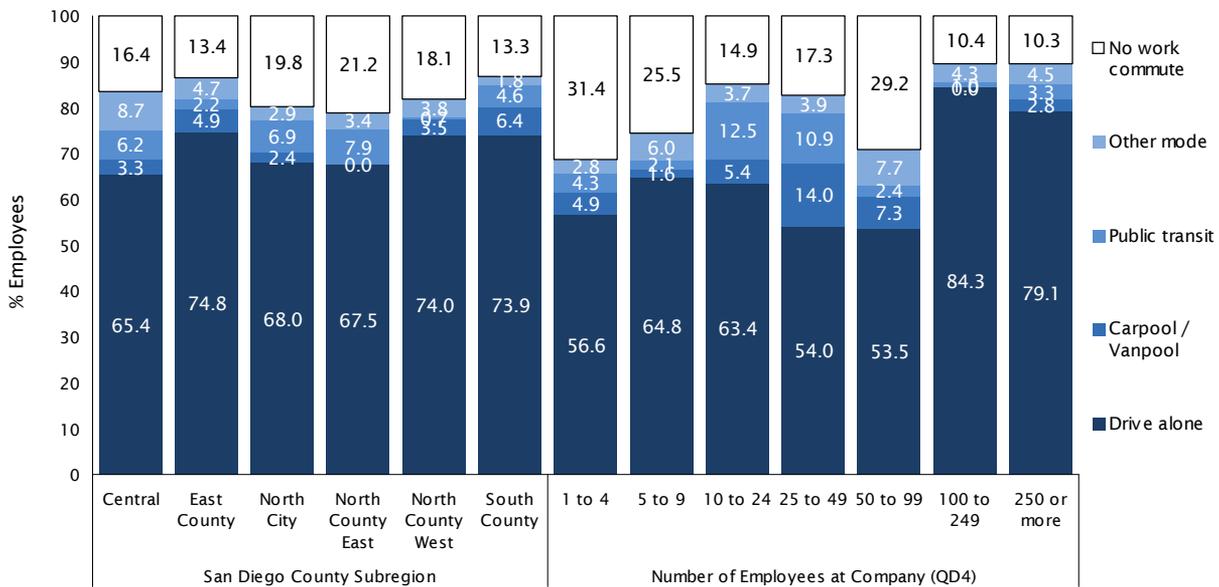


FIGURE 108 PRIMARY COMMUTE MODE BEFORE PANDEMIC BY SAN DIEGO COUNTY SUBREGION & NUMBER OF EMPLOYEES AT COMPANY

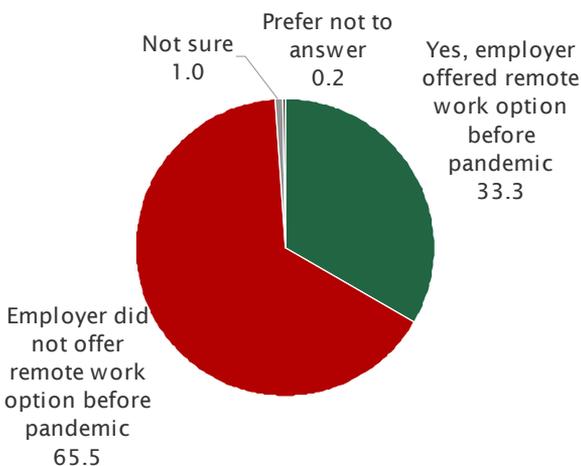


REMOTE WORK OPTION

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).

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

FIGURE 109 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 110-114).

FIGURE 110 EMPLOYER GAVE THE OPTION TO WORK FROM HOME PRIOR TO PANDEMIC BY INDUSTRY

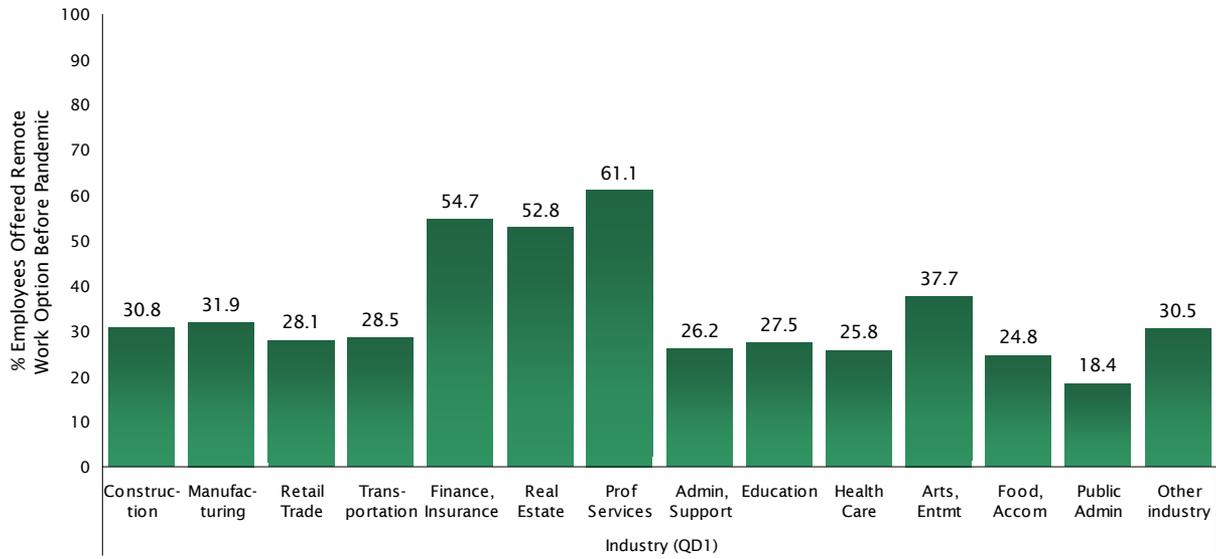


FIGURE 111 EMPLOYER GAVE THE OPTION TO WORK FROM HOME PRIOR TO PANDEMIC BY OCCUPATION

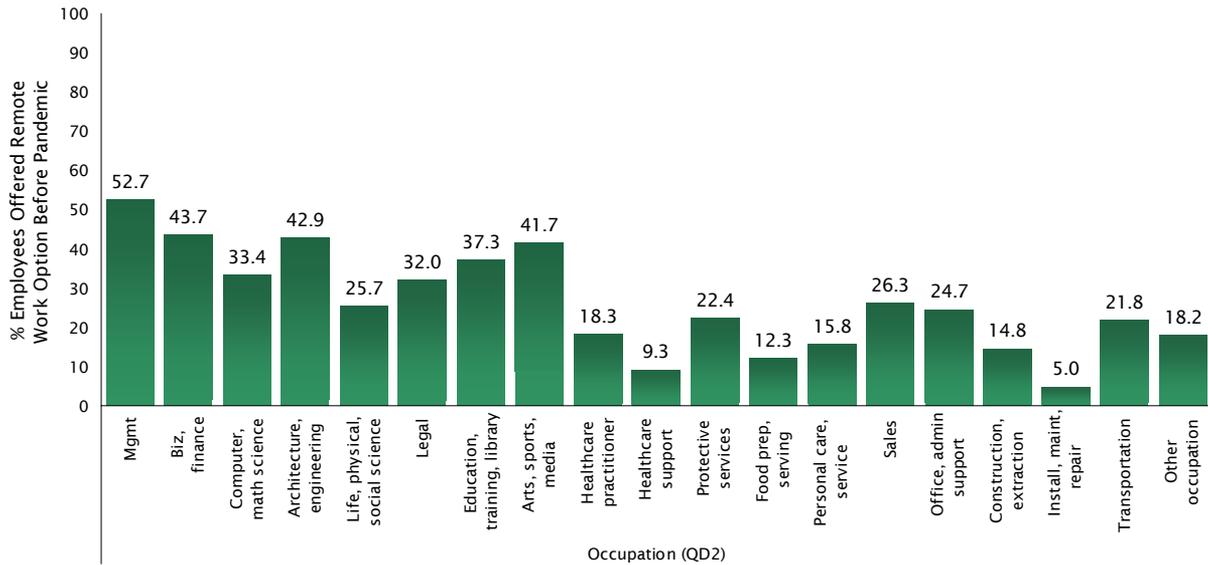


FIGURE 112 EMPLOYER GAVE THE OPTION TO WORK FROM HOME PRIOR TO PANDEMIC BY NUMBER OF EMPLOYEES AT COMPANY, INDEPENDENT CONTRACTOR & SURVEY LANGUAGE

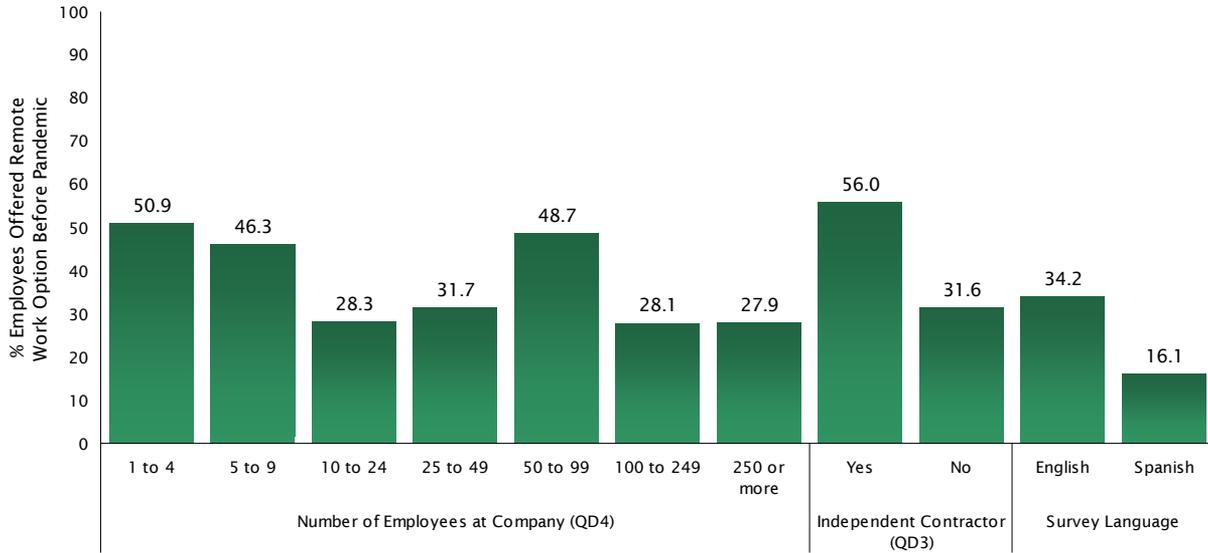


FIGURE 113 EMPLOYER GAVE THE OPTION TO WORK FROM HOME PRIOR TO PANDEMIC BY AGE & ETHNICITY

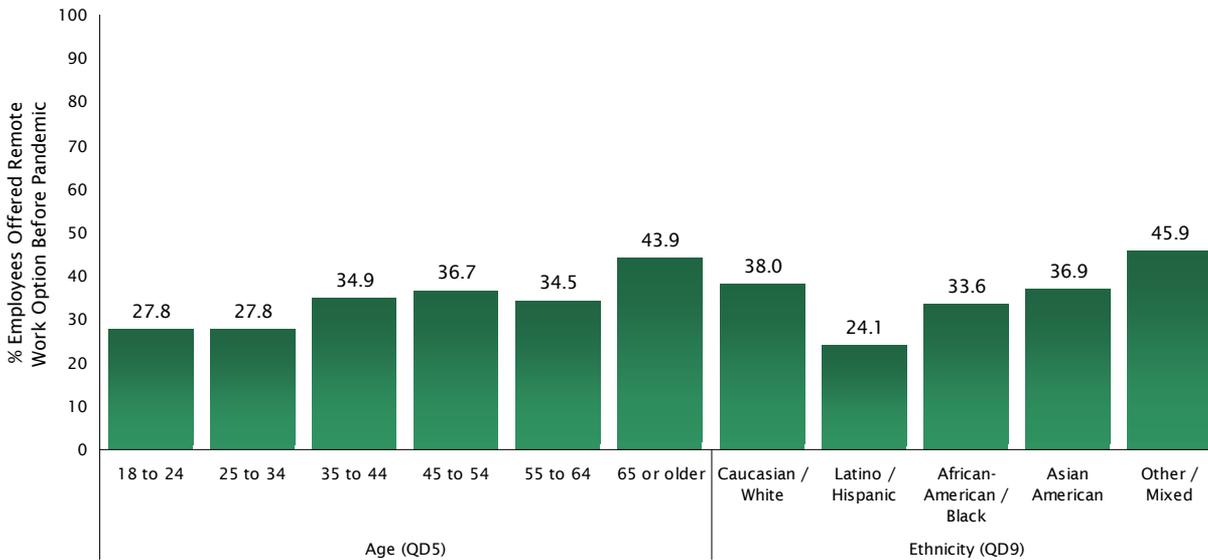
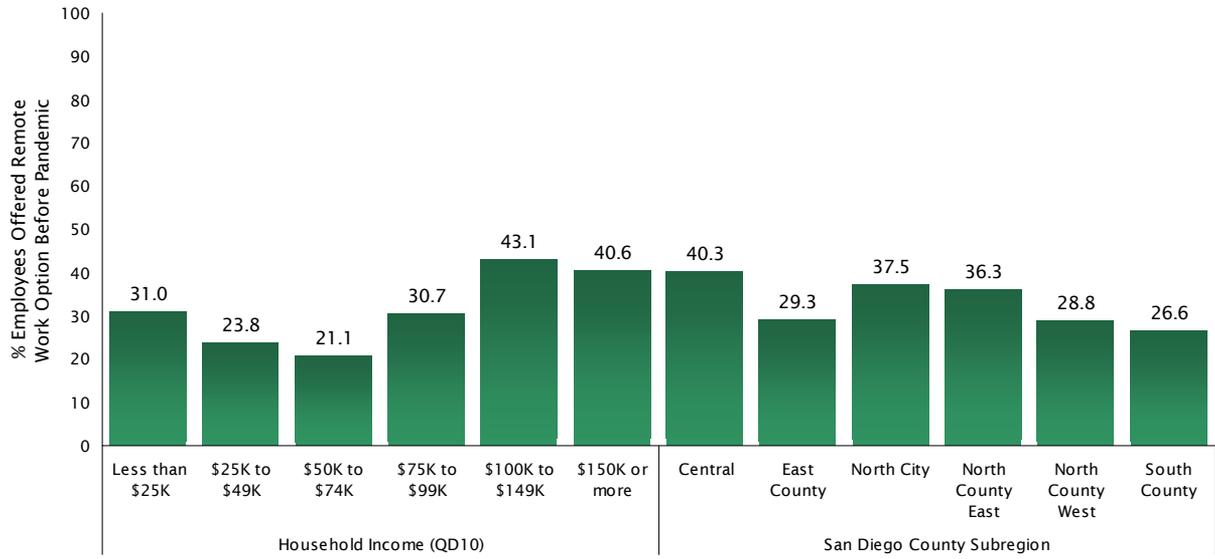


FIGURE 114 EMPLOYER GAVE THE OPTION TO WORK FROM HOME PRIOR TO PANDEMIC BY HOUSEHOLD INCOME & SAN DIEGO COUNTY SUBREGION



EMPLOYEES: PANDEMIC PERIOD

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

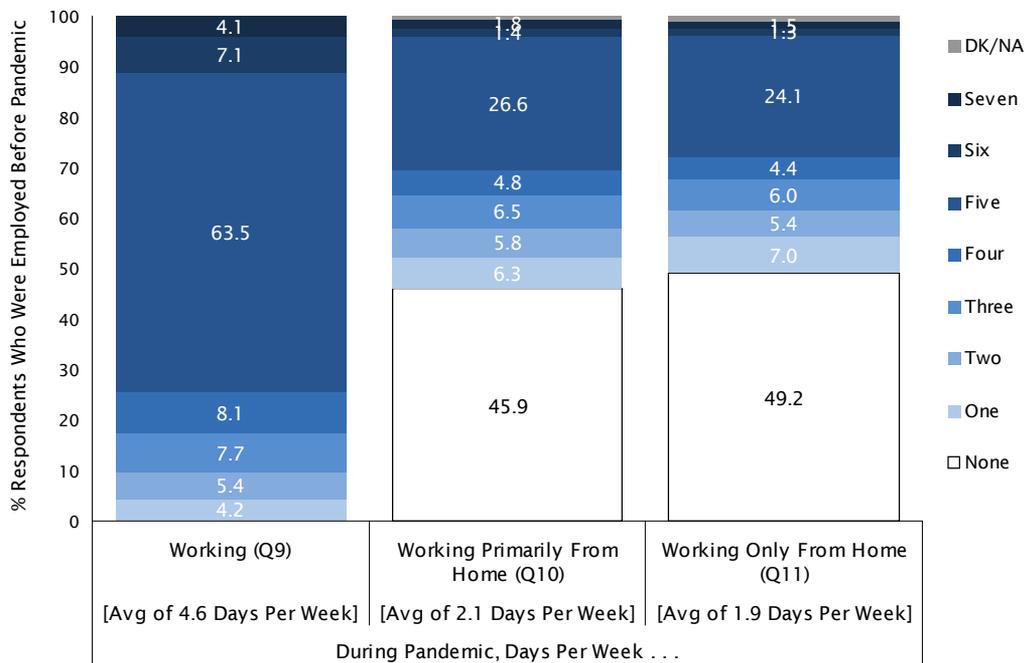
WORK DAYS & REMOTE WORK PATTERNS Although most employees (64%) continued to report that they worked five days per week during the pandemic (Figure 115), the percentage doing so declined 5% when compared to pre-pandemic levels. Overall, the average number of days worked per week declined from 4.8 prior to the pandemic to 4.6 at the time of the survey (during the pandemic).

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?

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?

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 115 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. In the pandemic period, more than half (54%) of employees indicated that they work from home at least one day per week, and nearly one-third of respondents (31%) stated they primarily work 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 in the current pandemic period. Similarly, the average number of days employees worked *exclusively* from home increased from 0.6 pre-pandemic to 1.9 during the pandemic.

Figures 116-119 present the average number of days worked, average days worked primarily from home, and average days worked exclusively from home in the current 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 currently working from home more often than their counterparts.

FIGURE 116 DAYS WORKED DURING PANDEMIC PER WEEK BY AGE, GENDER, INDEPENDENT CONTRACTOR & SURVEY LANGUAGE

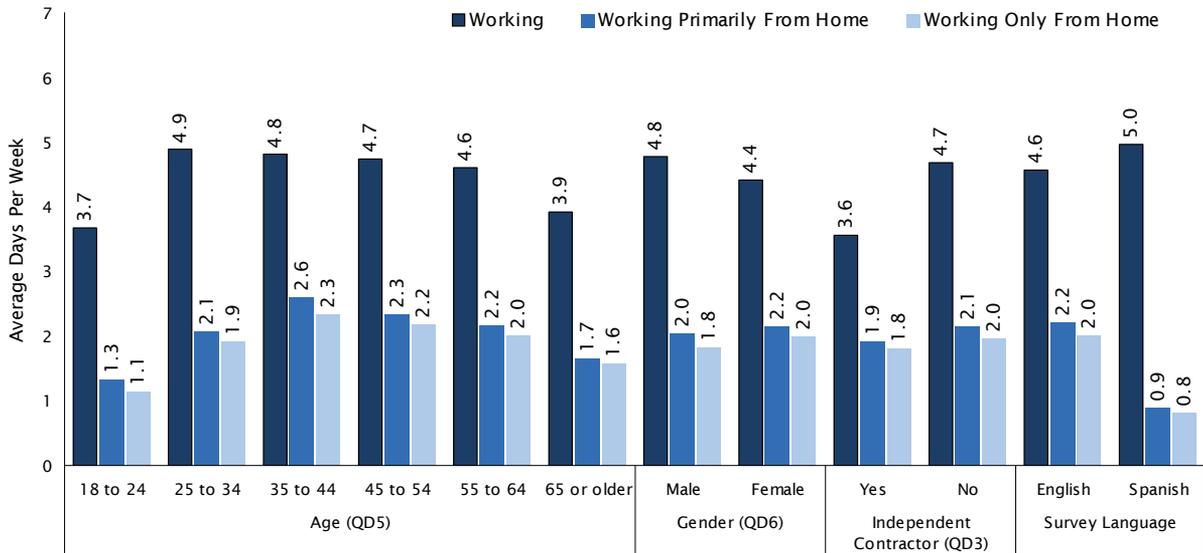


FIGURE 117 DAYS WORKED DURING PANDEMIC PER WEEK BY ETHNICITY & HOUSEHOLD INCOME

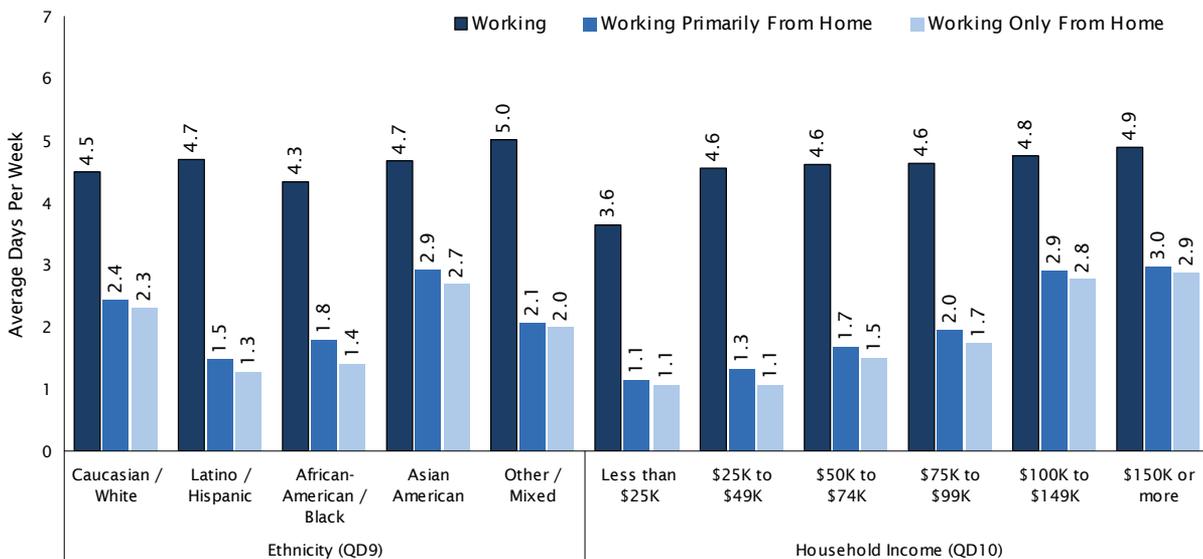


FIGURE 118 DAYS WORKED DURING PANDEMIC PER WEEK BY SAN DIEGO COUNTY SUBREGION & NUMBER OF EMPLOYEES AT COMPANY

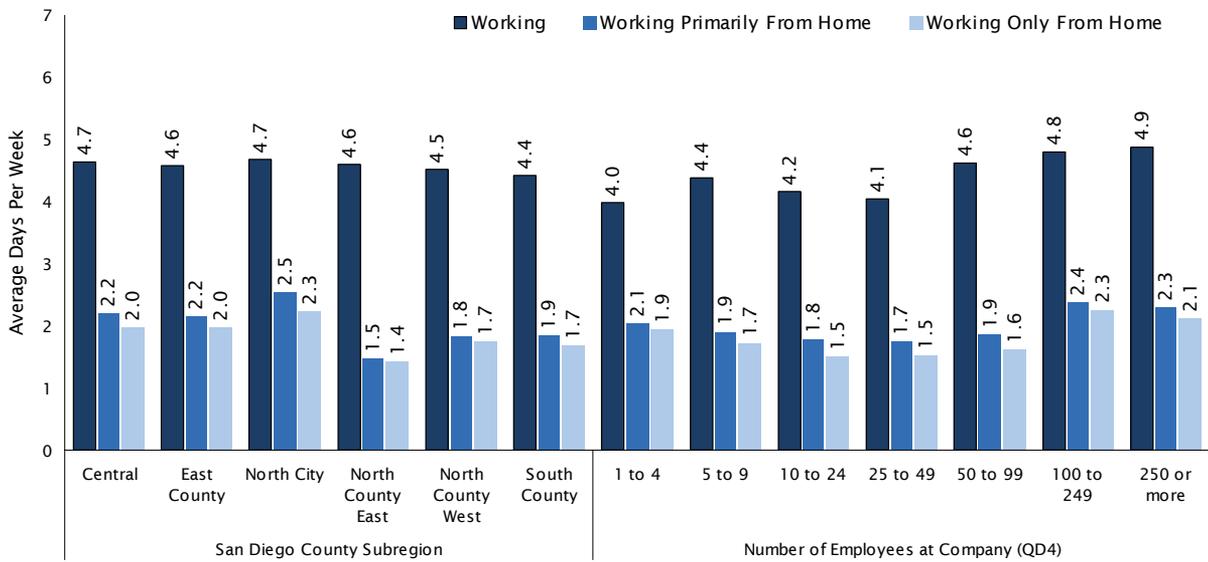


FIGURE 119 DAYS WORKED DURING PANDEMIC PER WEEK BY INDUSTRY

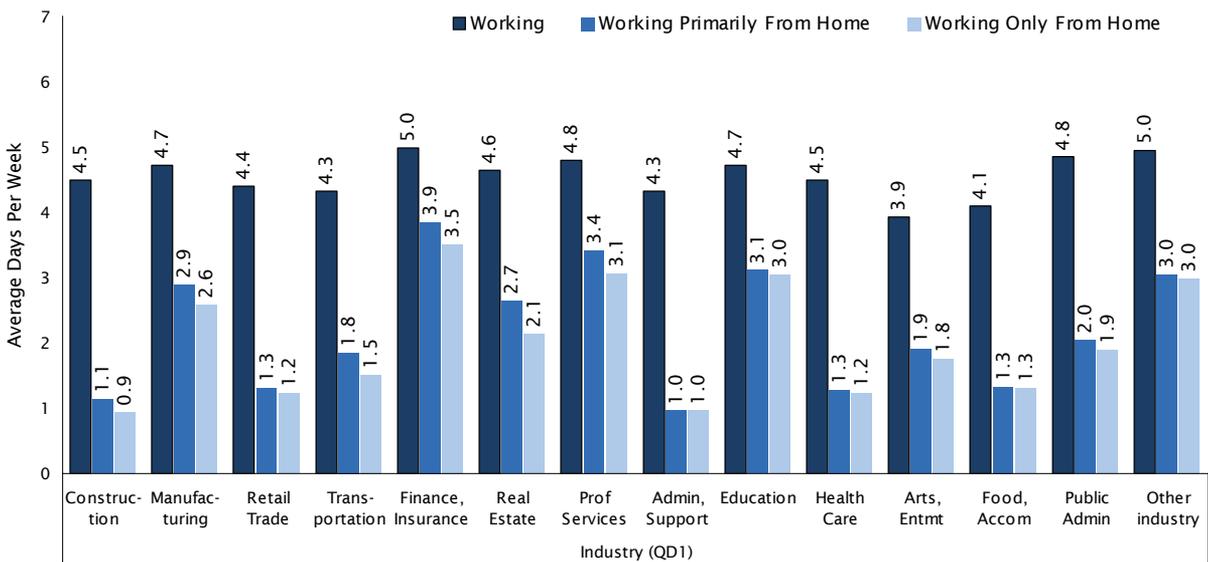


Figure 120 on the next page summarizes employees' work patterns in the current period, documenting the percentage of employees who fit into specific work arrangement categories. Whereas prior to the pandemic 68% of employees surveyed reported that they never worked from home (see Figure 99), less than half (46%) of employees indicated they currently work exclusively away from their home. Meanwhile, one-third of employees (33%) are working exclusively from home, up from 8% prior to the pandemic. Of the 21% who are currently working from home on a partial basis, 12% work exclusively at home some days and exclusively at an office other days, 5% work from home all days of the week, but split some days at the office for a few hours, and 4% work a mix of days at home, at the office, and split days. Figures 121-124 show how various subgroups of employees are distributed among the main work arrangement categories in the current period.

FIGURE 120 REMOTE WORK DURING PANDEMIC

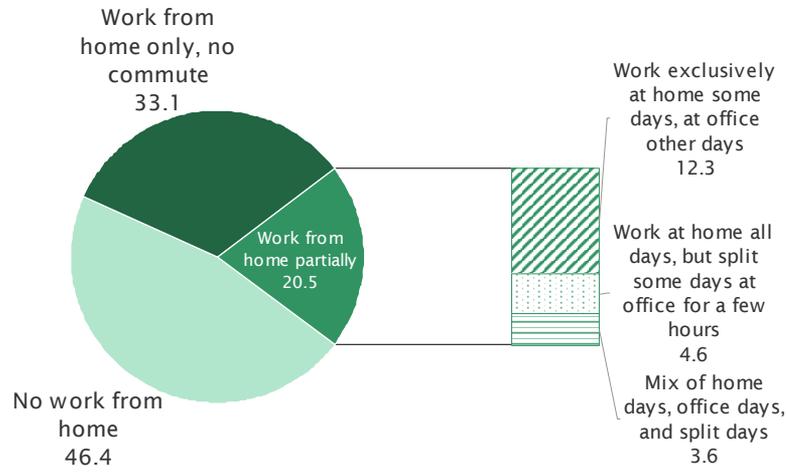


FIGURE 121 REMOTE WORK DURING PANDEMIC BY AGE, GENDER, INDEPENDENT CONTRACTOR & SURVEY LANGUAGE

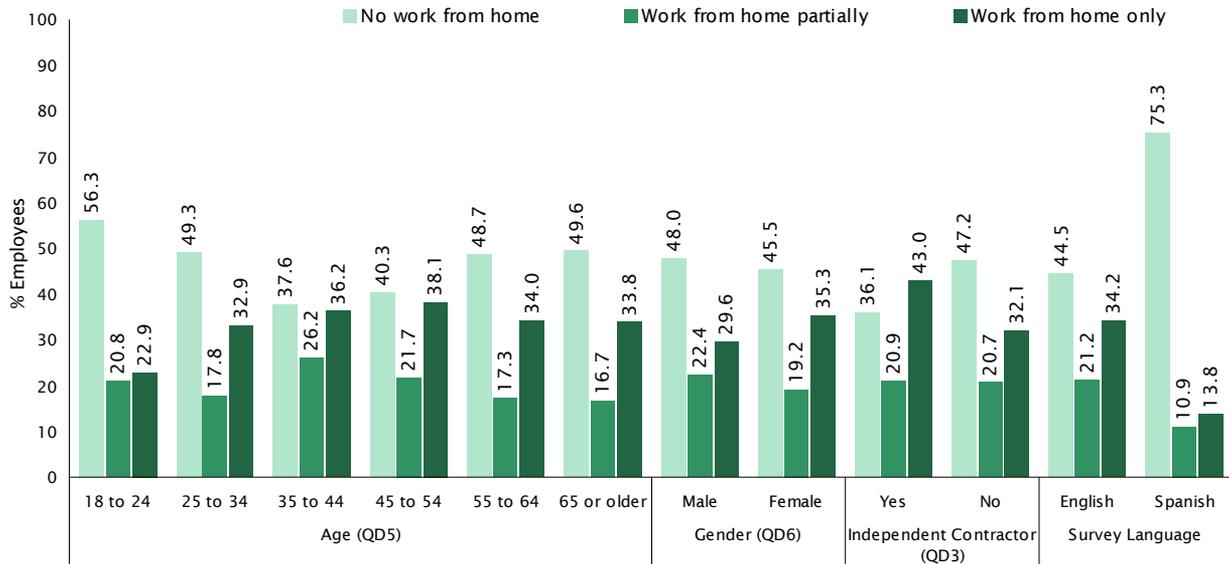


FIGURE 122 REMOTE WORK DURING PANDEMIC BY ETHNICITY & HOUSEHOLD INCOME

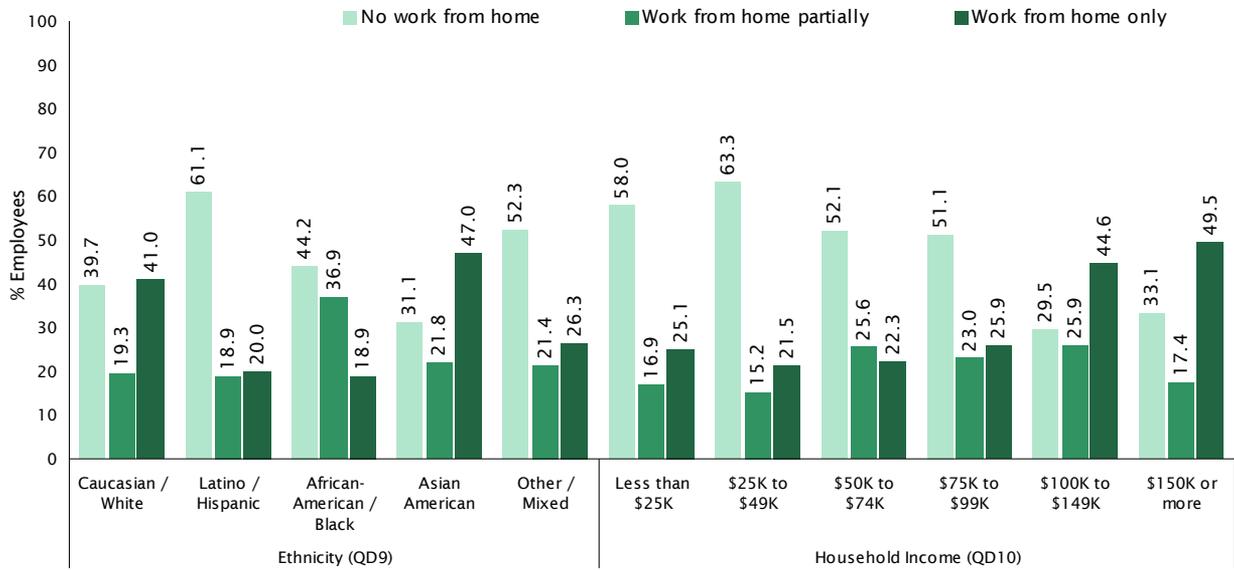


FIGURE 123 REMOTE WORK DURING PANDEMIC BY SAN DIEGO SUBREGION & NUMBER OF EMPLOYEES AT COMPANY

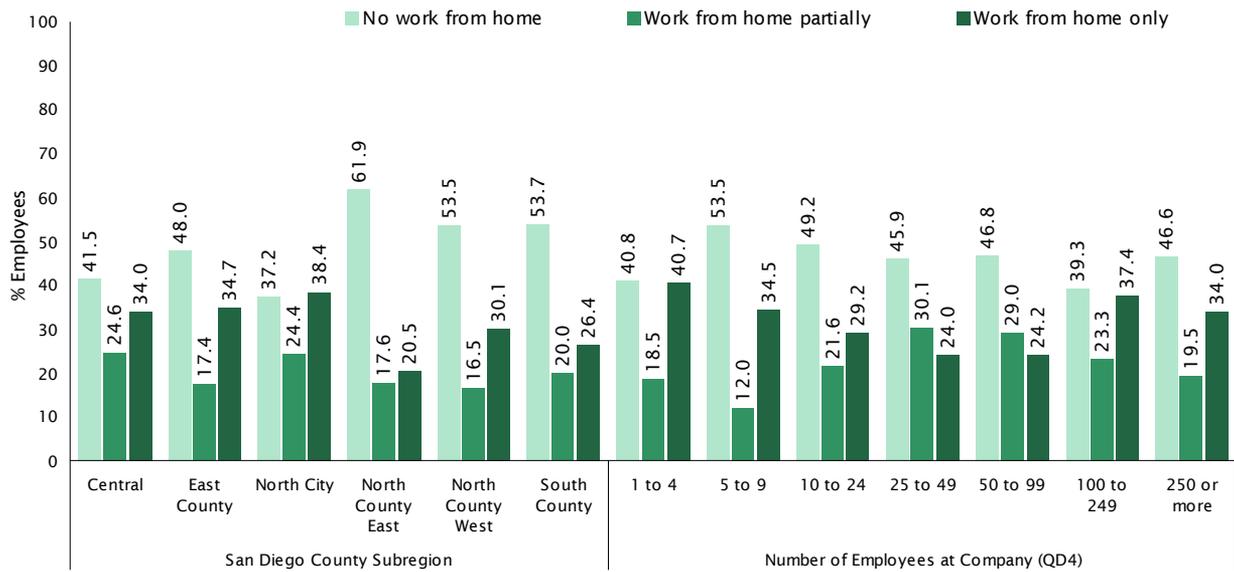
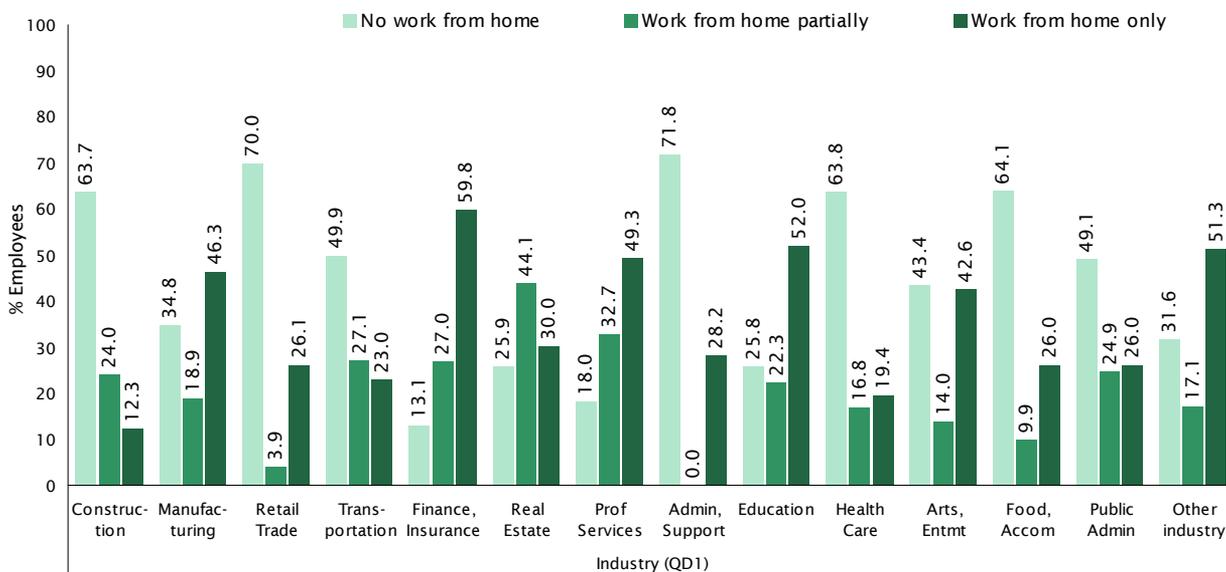


FIGURE 124 REMOTE WORK DURING PANDEMIC BY INDUSTRY



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 109 on page 64). In the current pandemic period, the corresponding percentage is much higher at 59% (Figure 125), although it varies substantially by industry, occupation, ethnicity, household income, subregion of residence, and the language in which the survey was completed (see Figures 126-130). At the extremes, just 9% of individuals working in healthcare and installation, maintenance or repair indicated they have the option to work remotely, whereas more than 90% of architects, engineers, and those working as life, physical or social scientists have 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 to report having the option to work remotely in the current period.

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

FIGURE 125 EMPLOYER CURRENTLY GIVES THE OPTION TO WORK FROM HOME

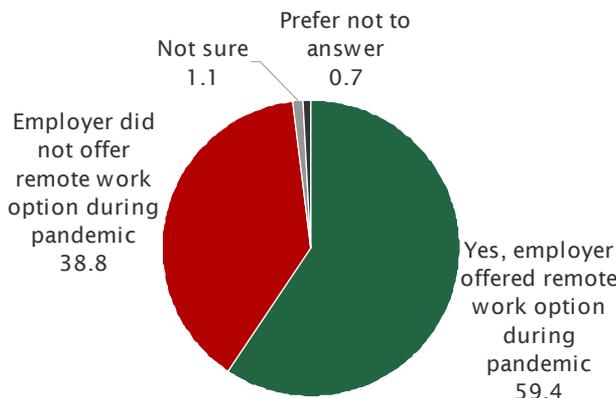


FIGURE 126 EMPLOYER CURRENTLY GIVES THE OPTION TO WORK FROM HOME BY INDUSTRY

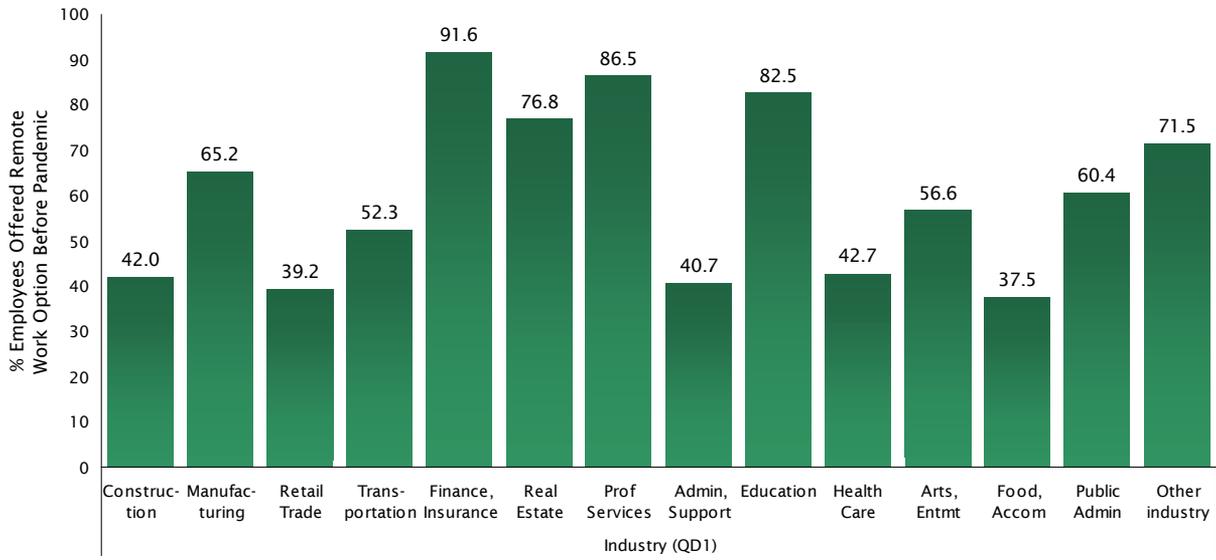


FIGURE 127 EMPLOYER CURRENTLY GIVES THE OPTION TO WORK FROM HOME BY OCCUPATION

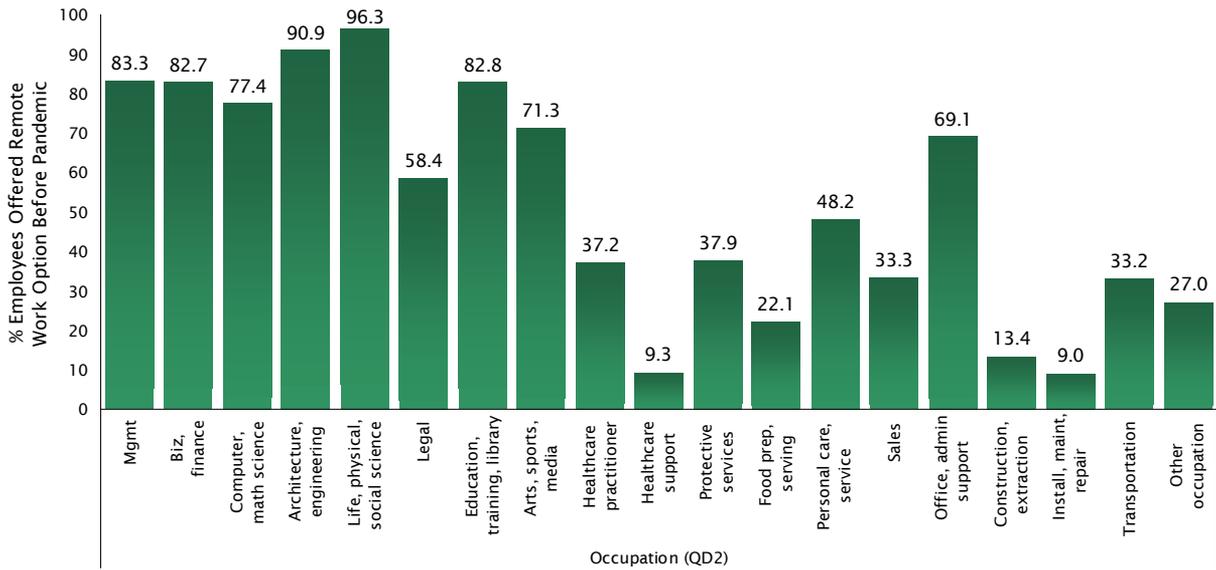


FIGURE 128 EMPLOYER CURRENTLY GIVES THE OPTION TO WORK FROM HOME BY NUMBER OF EMPLOYEES AT COMPANY, INDEPENDENT CONTRACTOR & SURVEY LANGUAGE

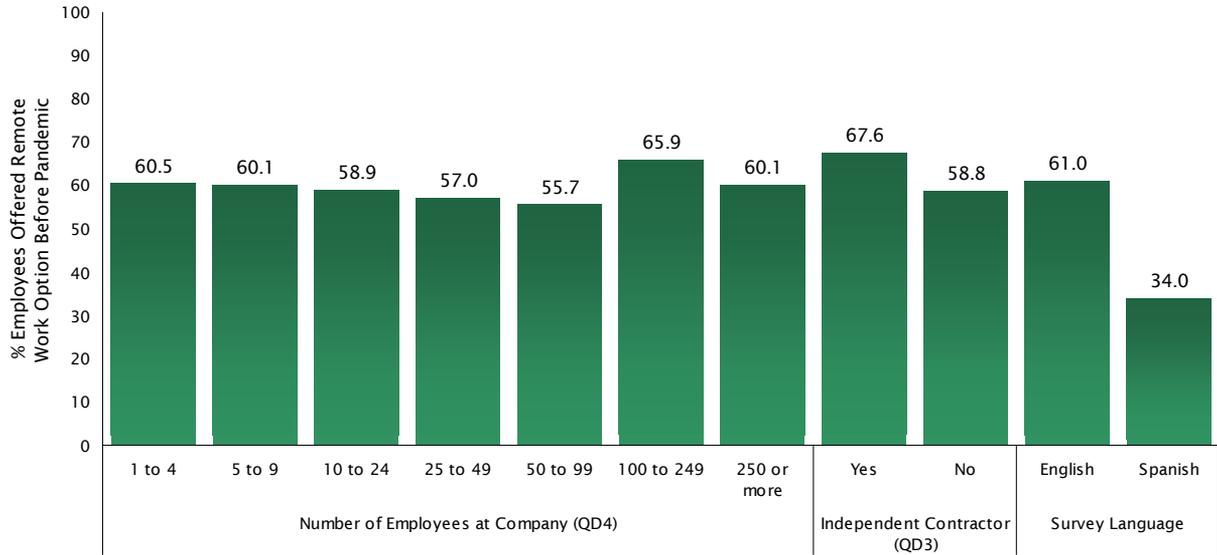


FIGURE 129 EMPLOYER CURRENTLY GIVES THE OPTION TO WORK FROM HOME BY AGE & ETHNICITY

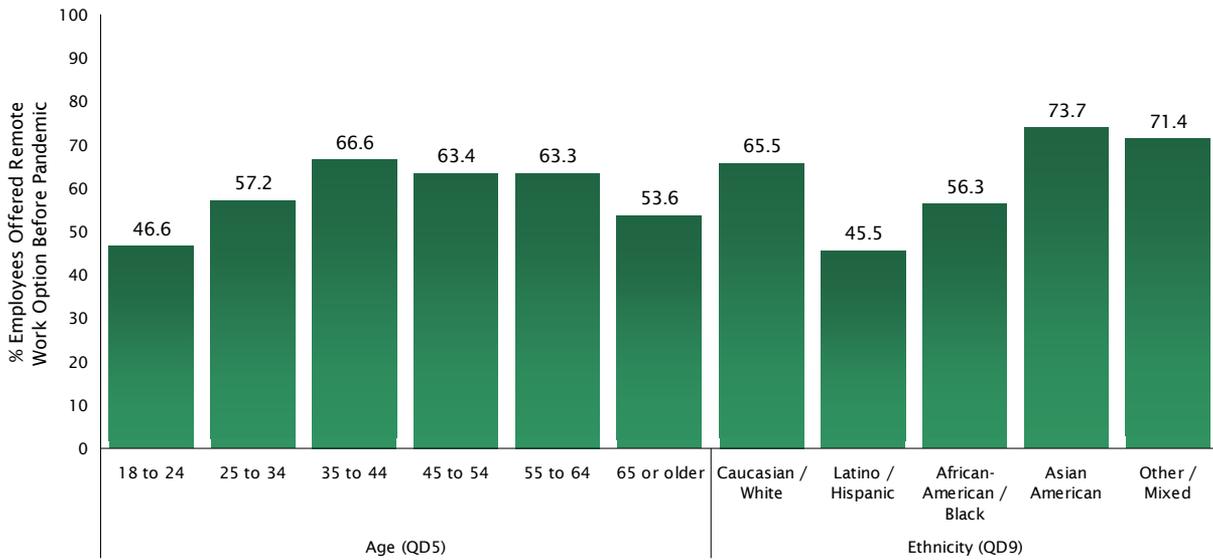
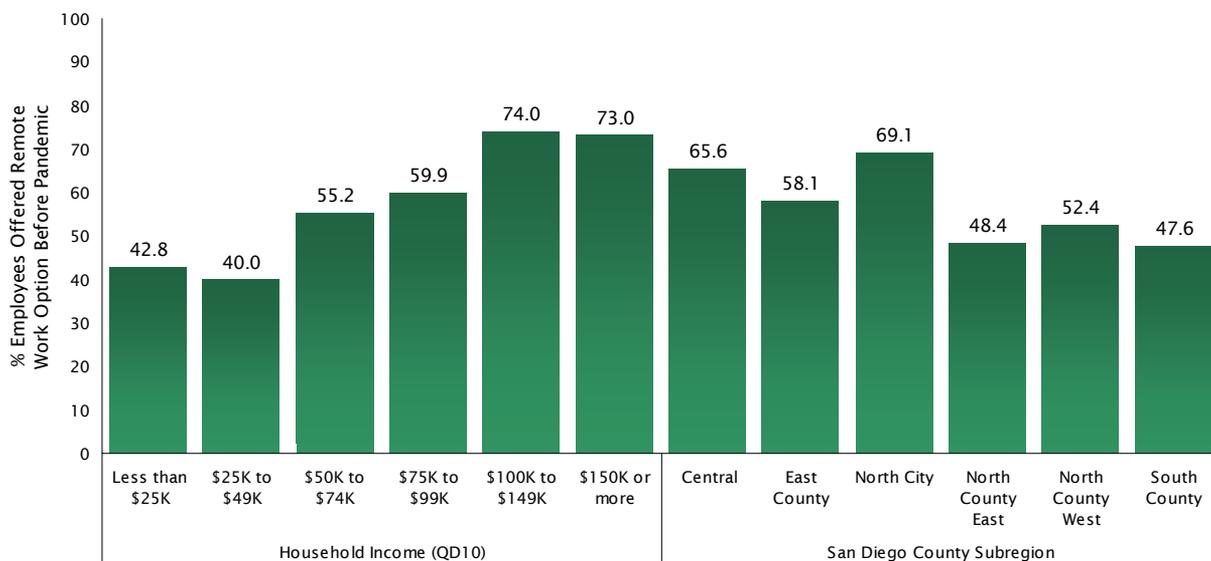


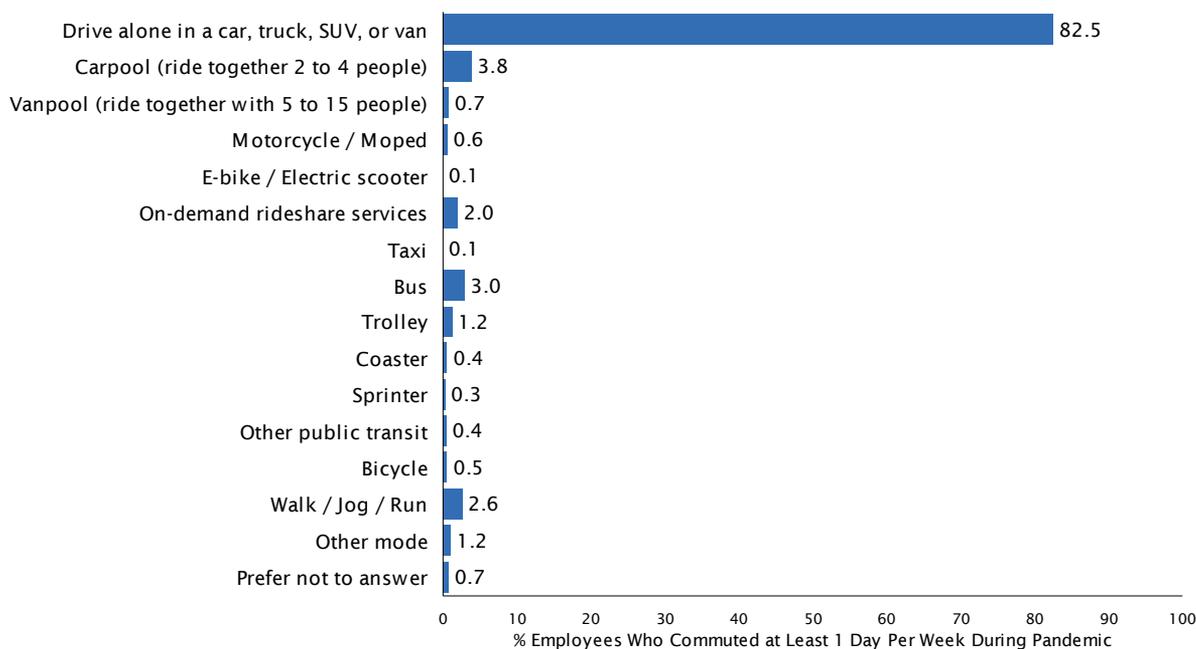
FIGURE 130 EMPLOYER CURRENTLY GIVES THE OPTION TO WORK FROM HOME BY HOUSEHOLD INCOME & SAN DIEGO COUNTY SUBREGION



COMMUTE MODE Respondents 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 104).

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 131 CURRENT PRIMARY MODE OF TRANSPORTATION TO WORK



As shown in Figure 131, 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 132 PRIMARY COMMUTE MODE DURING PANDEMIC

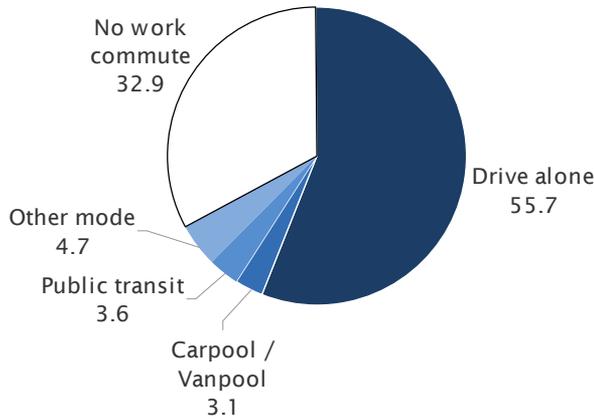


Figure 132 consolidates the various methods of commuting into general categories and places the results in context of *all* employees surveyed. Approximately 33% of employees indicated they do not commute to a separate work site in the current pandemic period, 56% primarily commute by driving solo, whereas less than 5% primarily commute by carpool/vanpool (3%), public transit (4%), or other mode (5%), respectively. Figures 133-135 illustrate how current commute patterns and modes varied across subgroups of employees.

FIGURE 133 PRIMARY COMMUTE MODE DURING PANDEMIC BY AGE, GENDER, INDEPENDENT CONTRACTOR & SURVEY LANGUAGE

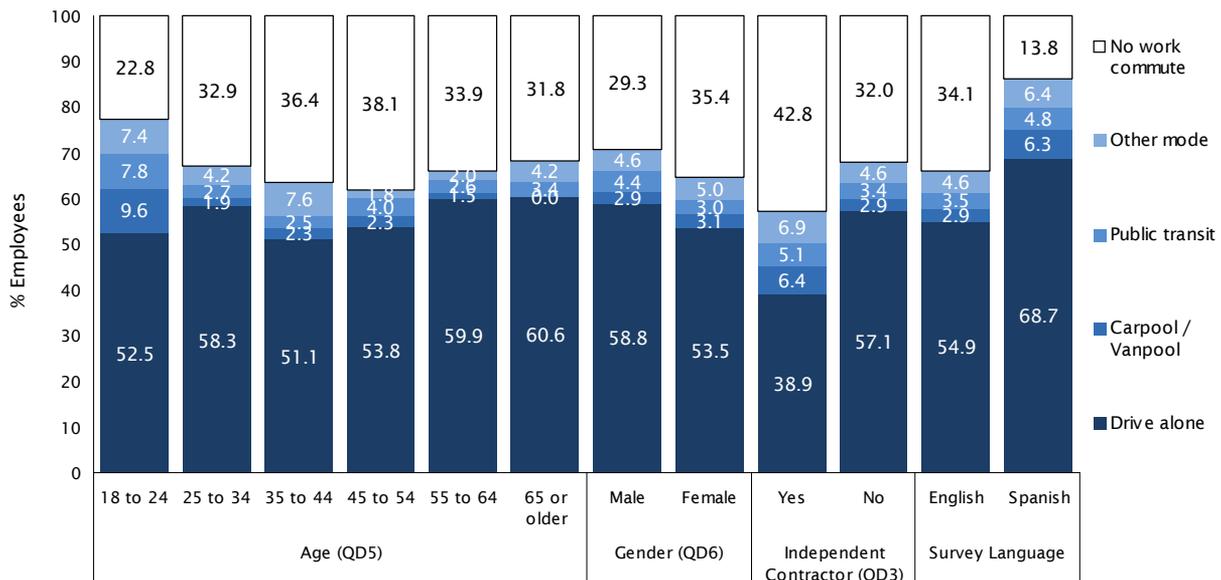


FIGURE 134 PRIMARY COMMUTE MODE DURING PANDEMIC BY ETHNICITY & HOUSEHOLD INCOME

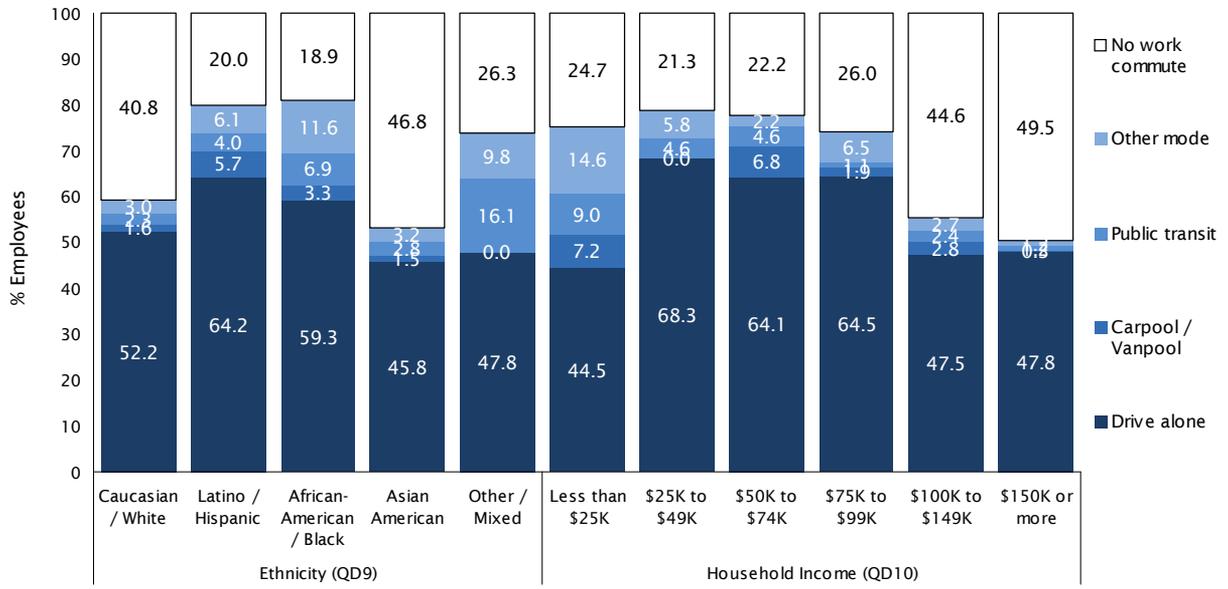
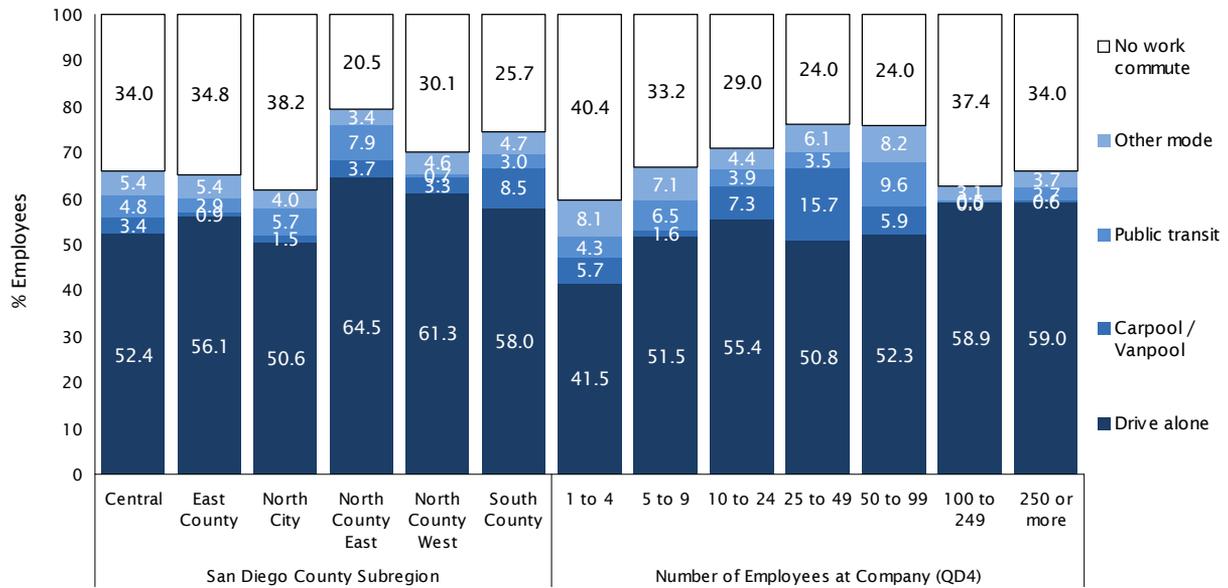


FIGURE 135 PRIMARY COMMUTE MODE DURING PANDEMIC BY SAN DIEGO COUNTY SUBREGION & NUMBER OF EMPLOYEES AT COMPANY



EMPLOYEES: REMOTE WORK EXPERIENCES

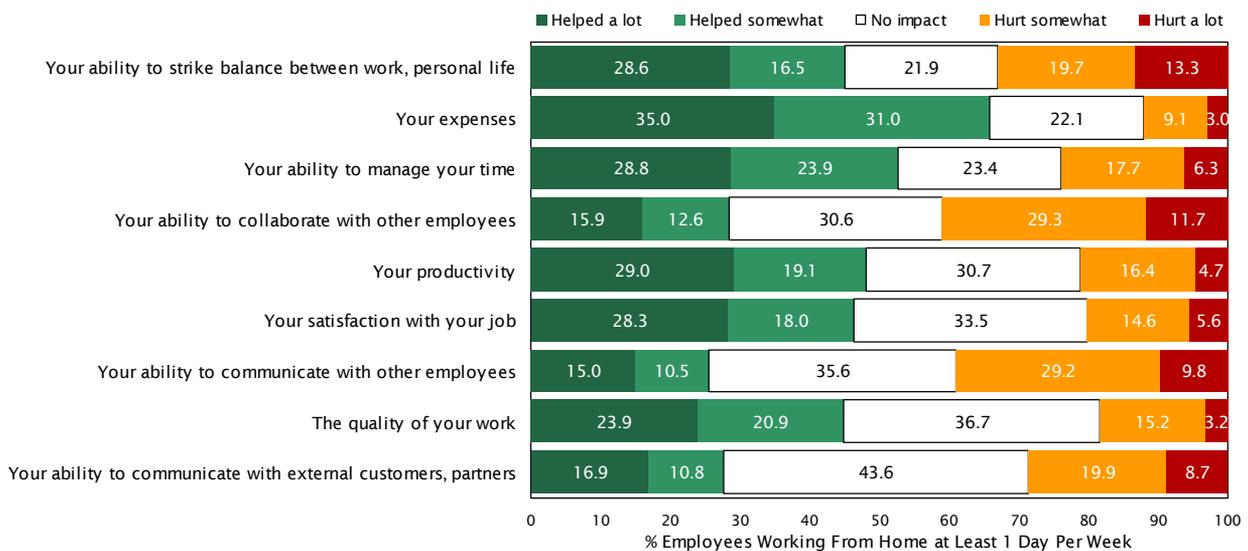
Employees who currently work at home at least one day per week were asked to describe how remote work has impacted various aspects of their job performance, their ability to collaborate with other employees, as well as their personal life and living arrangements.

REMOTE WORK IMPACTS The first question in their series presented respondents with each item shown on the left of Figure 136 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).

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, 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 has 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.

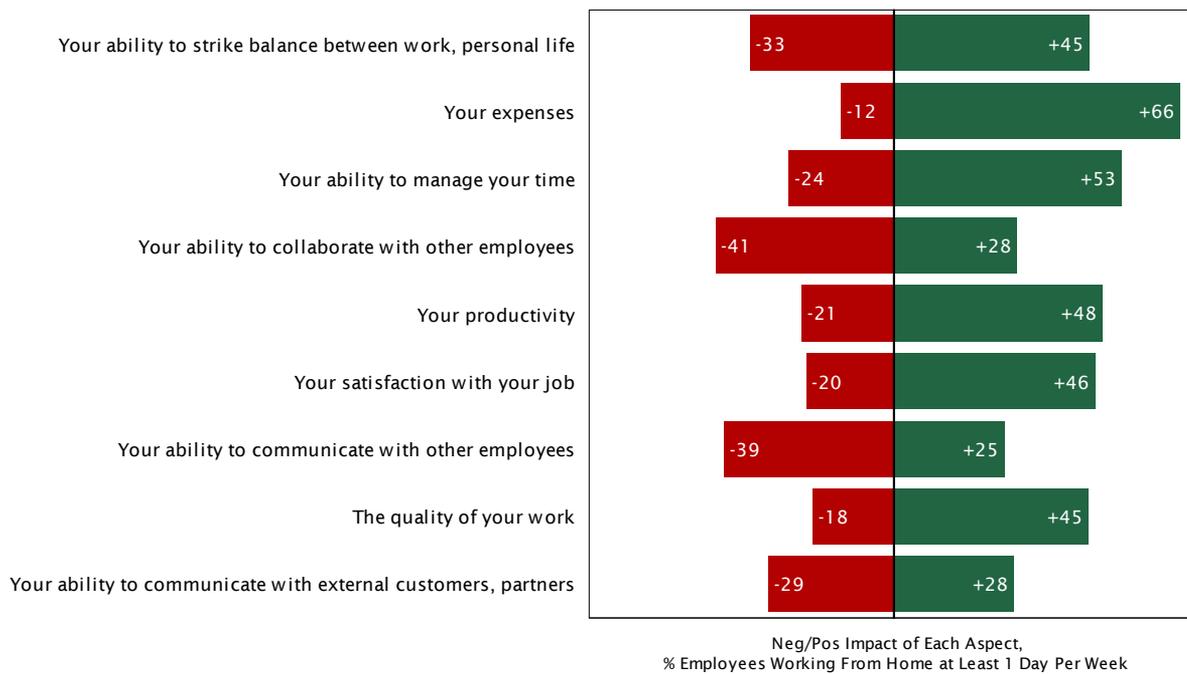
Question 14 *Next are a few questions about your experiences working from home during the past year. In general, do you find that working from home has helped, had no impact, or hurt:-----?*

FIGURE 136 IMPACT OF WORKING FROM HOME



For every dimension tested, some employees felt that remote work arrangements helped, while others perceived they hurt. Figure 137 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 work arrangements to be harmful on most dimensions (see Figure 59 on page 38), employees were more apt to find that remote work helps 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 137 NEGATIVE/POSITIVE IMPACTS OF EACH ASPECT



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 138 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 have plans to do so in response to working from home, while approximately one-in-ten (12%) reduced the number of vehicles their household owns. Figure 139 shows how the percentage of employees that made changes in response to working from home 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.

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

FIGURE 138 CHANGES MADE DUE TO WORKING FROM HOME

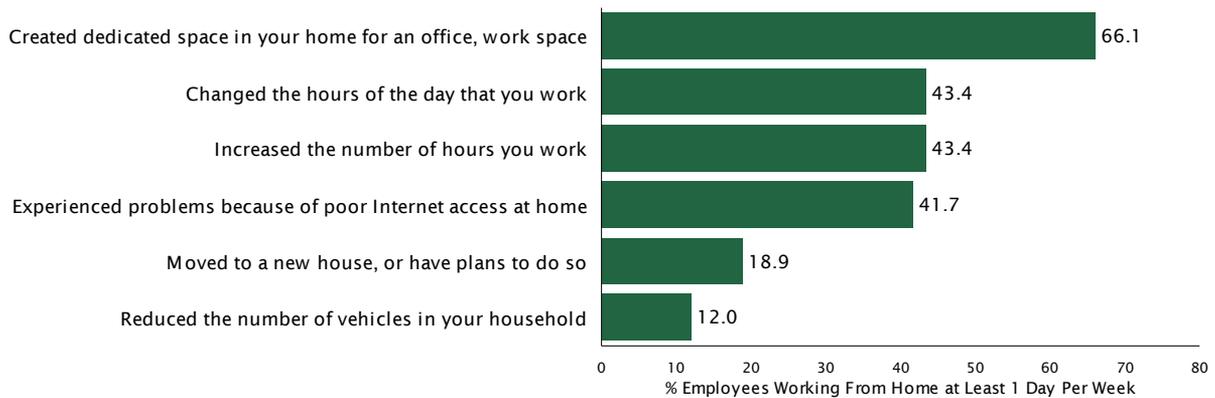
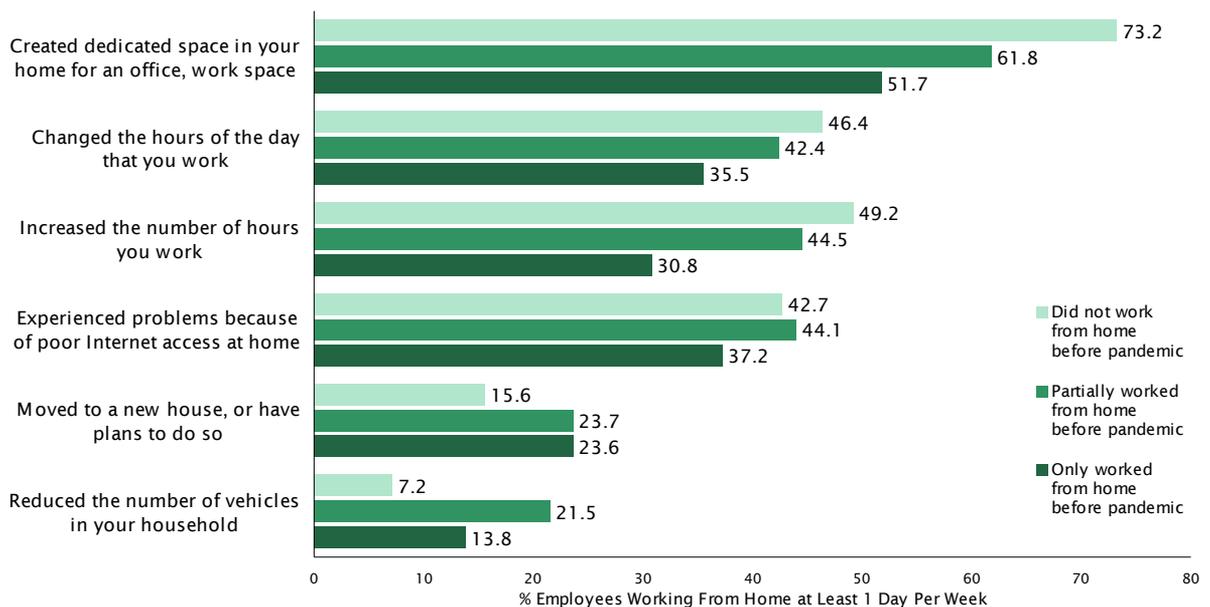


FIGURE 139 CHANGES MADE DUE TO WORKING FROM HOME BY REMOTE WORK STATUS BEFORE PANDEMIC



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 survey results do not reveal a net migration to distances further away from employers’ locations. Figure 140 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 141). 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 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.

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 140 NEW HOME LOCATION

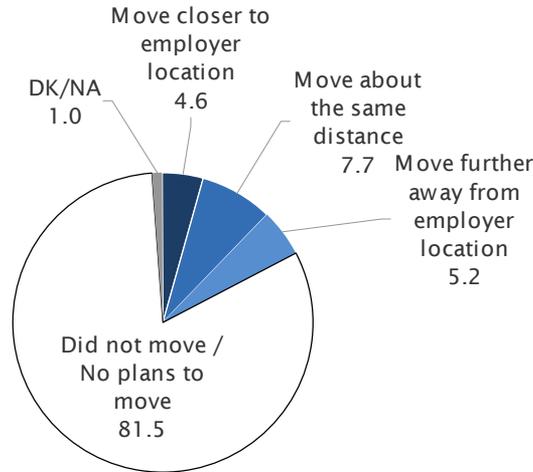
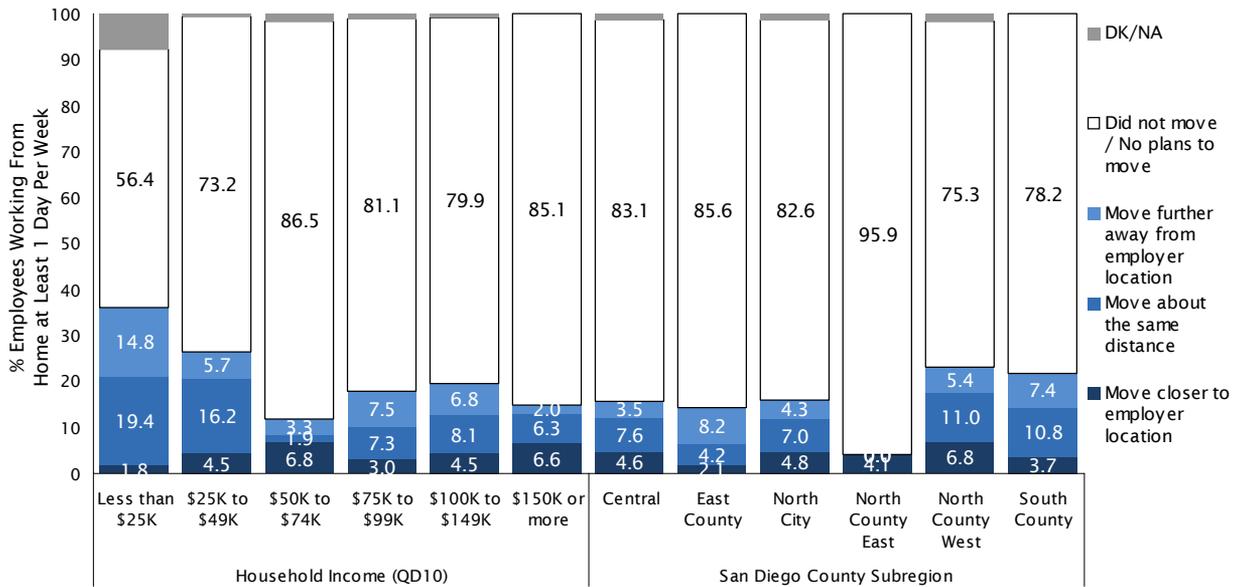


FIGURE 141 NEW HOME LOCATION BY HOUSEHOLD INCOME & SAN DIEGO COUNTY SUBREGION



EMPLOYEES: PANDEMIC TRAVEL & ACTIVITIES

Although much of the 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 142, employees were asked whether they currently engage 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 shop online and have packages delivered to their home more often (67%) and have food or groceries delivered to their home (48%) more often now than pre-pandemic.

When it comes to *driving*, however, employees generally reported that they are doing less of this now 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%) now when compared to before the pandemic.

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 142 FREQUENCY OF ACTIVITIES COMPARED TO BEFORE PANDEMIC STARTED

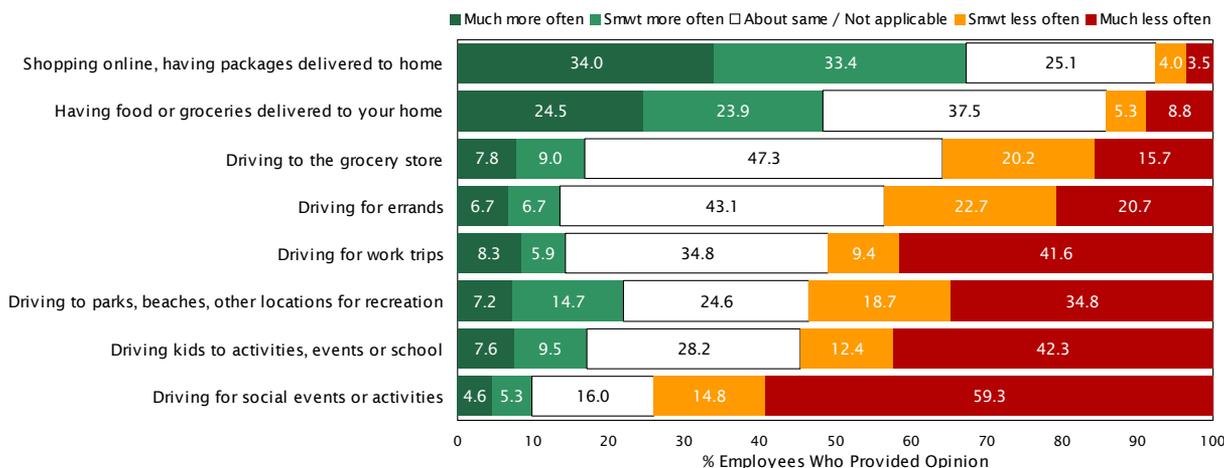
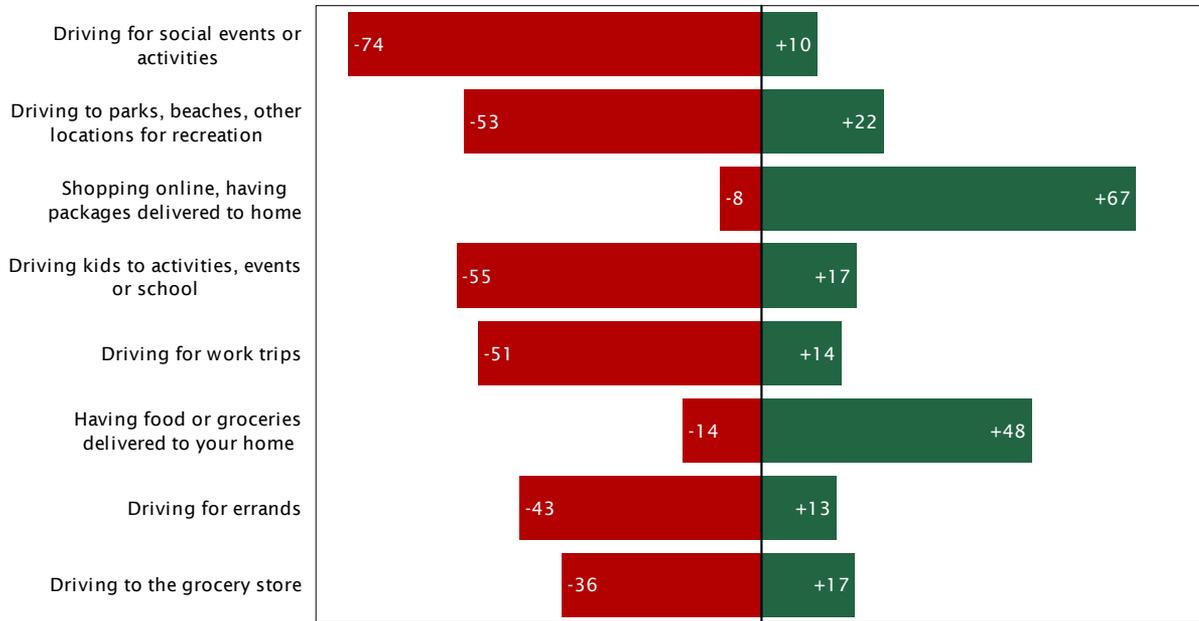


Figure 143 on the next presents a simplified view of the data that makes it easier to identify those activities with the largest net increases or decreases in frequency in the current period when compared to before the pandemic. All driving-related items were found to have large net decreases in frequency, whereas the online shopping and food-delivery items had large increases.

FIGURE 143 DECREASE VS INCREASE OF ACTIVITIES SINCE PANDEMIC



Frequency of Activity Decrease vs Increase Since Beginning of Pandemic, % Employees Who Provided Opinion

EMPLOYEES: POST-PANDEMIC

Having explored how the pandemic impacted employees' work arrangements and various aspects of their professional and private lives, the 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?

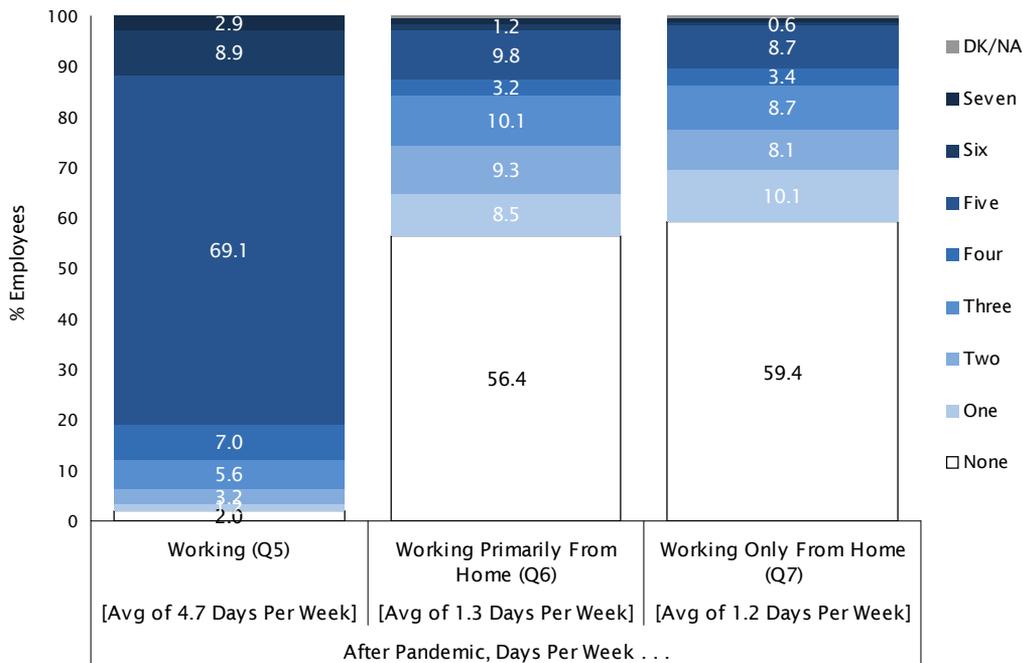
WORK DAYS & REMOTE WORK PATTERNS Looking ahead to the post-pandemic period, more than two-thirds of employees (69%) anticipated they would work five days per week, and an additional 12% expected to work six or seven days per week (Figure 144). When compared to the current period, the average number of days employees expected to work increased slightly from 4.6 to 4.7 once the pandemic is over.

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?*

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.*

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 144 DAYS EXPECTED TO WORK AFTER PANDEMIC PER WEEK



With respect to *where* they will be working, 44% of employees indicated they expect to work from home at least one day per week during the post-pandemic period, which represents a decline from 54% in the current period. The average number of days employees expect to work from home also declined from 2.1 (current period) to 1.3 once the pandemic is over. Similarly, excluding split days, the average number of days employees expect to work exclusively from home declined from 1.9 in the current period to 1.2 once the pandemic is over. Figures 145-148 show how the average number of work days and days working from home anticipated during the post-pandemic period varied across employee subgroups.

FIGURE 145 DAYS EXPECTED TO WORK AFTER PANDEMIC PER WEEK BY AGE, GENDER, INDEPENDENT CONTRACTOR & SURVEY LANGUAGE

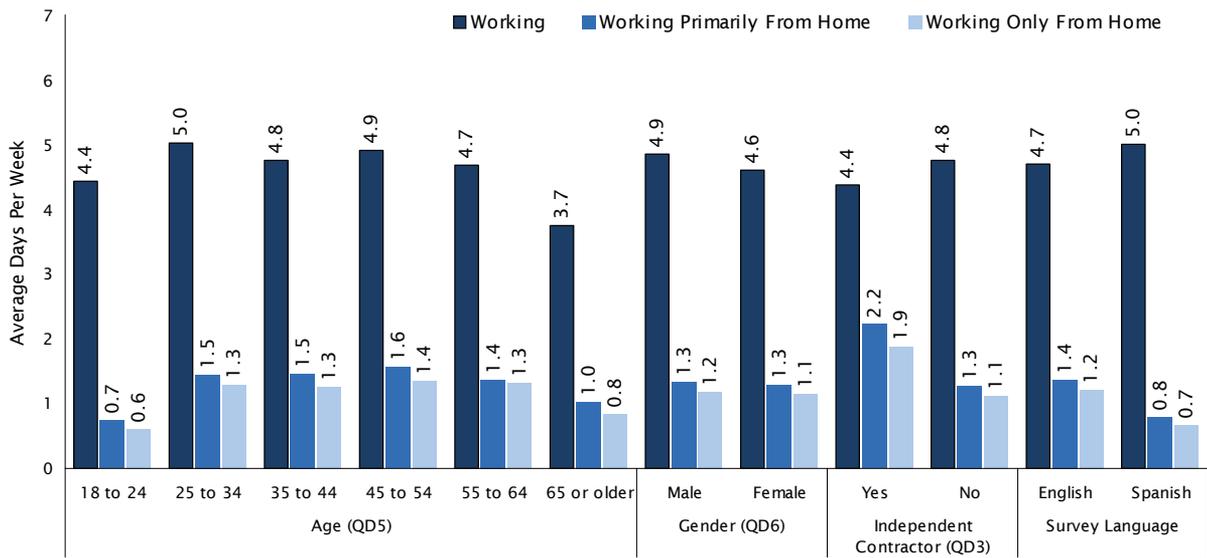


FIGURE 146 DAYS EXPECTED TO WORK AFTER PANDEMIC PER WEEK BY ETHNICITY & HOUSEHOLD INCOME

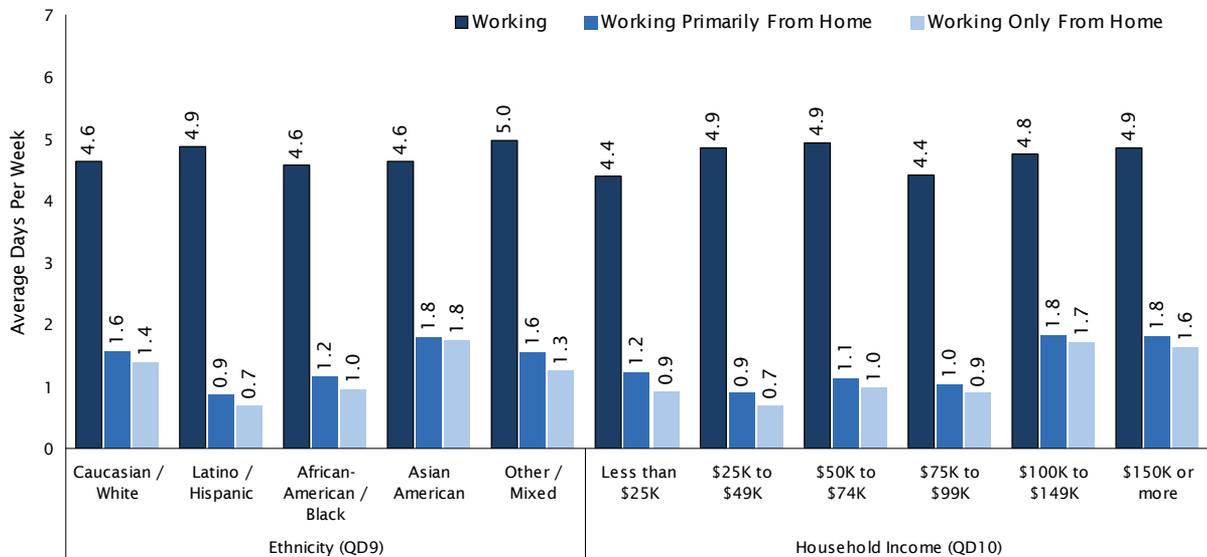


FIGURE 147 DAYS EXPECTED TO WORK AFTER PANDEMIC PER WEEK BY SAN DIEGO COUNTY SUBREGION & NUMBER OF EMPLOYEES AT COMPANY

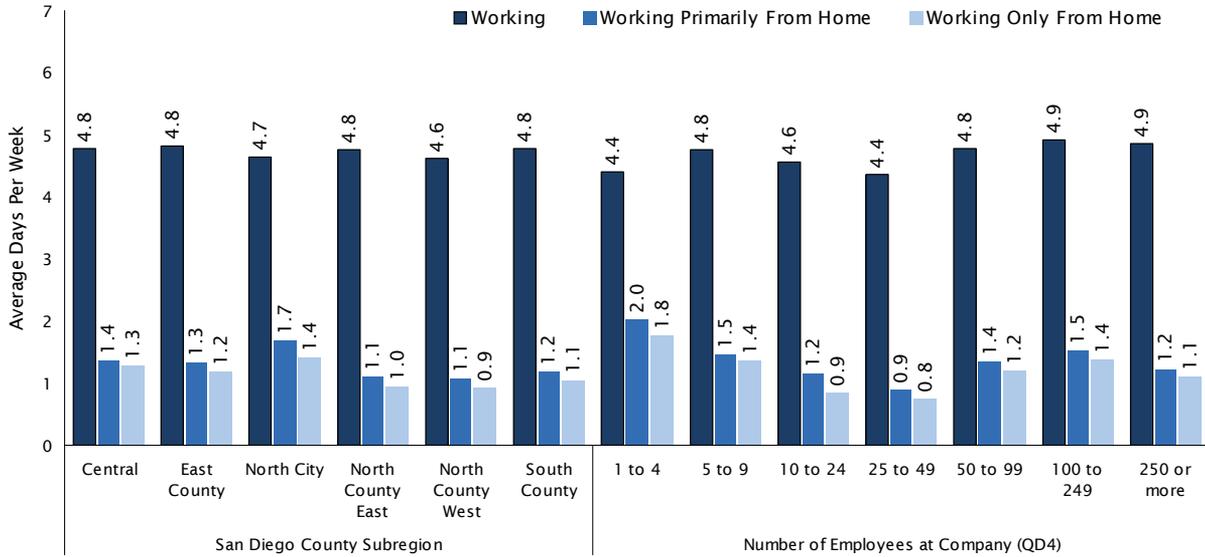


FIGURE 148 DAYS EXPECTED TO WORK AFTER PANDEMIC PER WEEK BY INDUSTRY

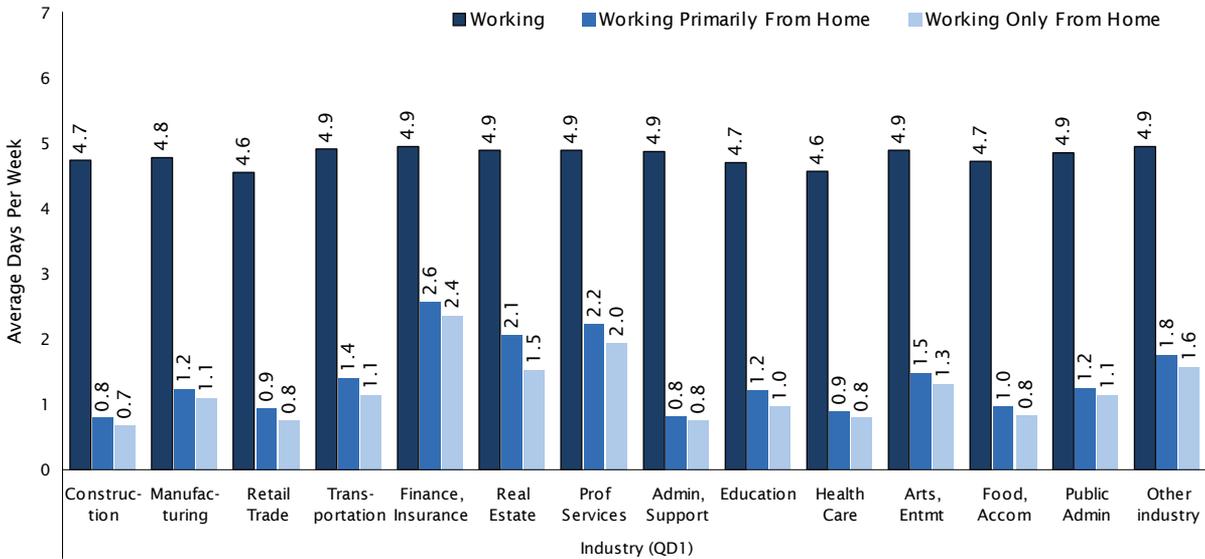
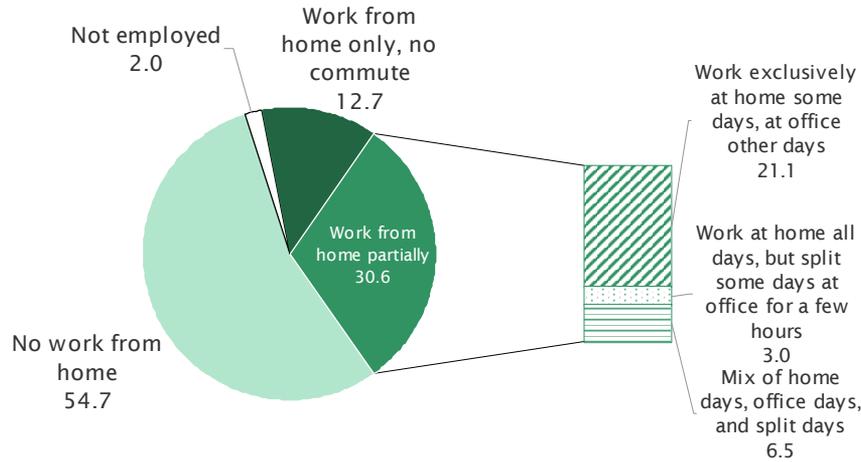


Figure 149 on the next page summarizes employees' expected work patterns once the pandemic is over, documenting the percentage of employees who fit into specific work arrangement categories. Once the pandemic is over, 55% of employees indicated they expect to work exclusively *away* from their home. 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%). It appears that many of the employees currently working exclusively from home anticipate 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%) is higher than that found during the pandemic (21%) and pre-pandemic (15%) periods. Most employees who

anticipate working at home on a partial basis 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 149 REMOTE WORK AFTER PANDEMIC



Figures 150-153 show how various subgroups of employees expect to be distributed among the main work arrangement categories once the pandemic is over. Although the percentages are different than found in the current 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 150 REMOTE WORK AFTER PANDEMIC BY AGE, GENDER, INDEPENDENT CONTRACTOR & SURVEY LANGUAGE

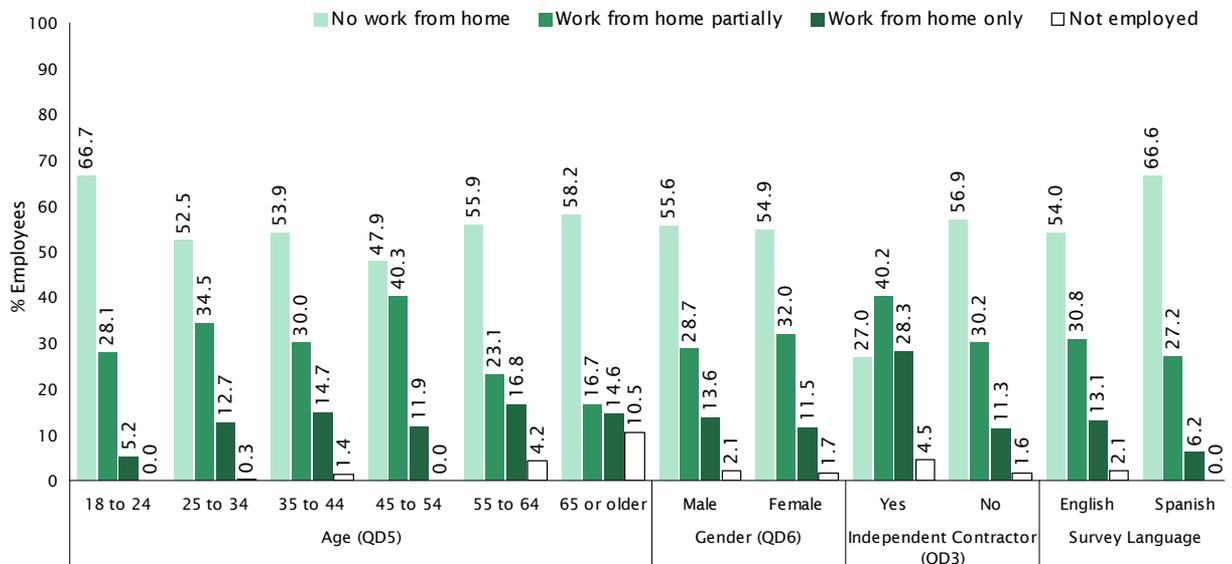


FIGURE 151 REMOTE WORK AFTER PANDEMIC BY ETHNICITY & HOUSEHOLD INCOME

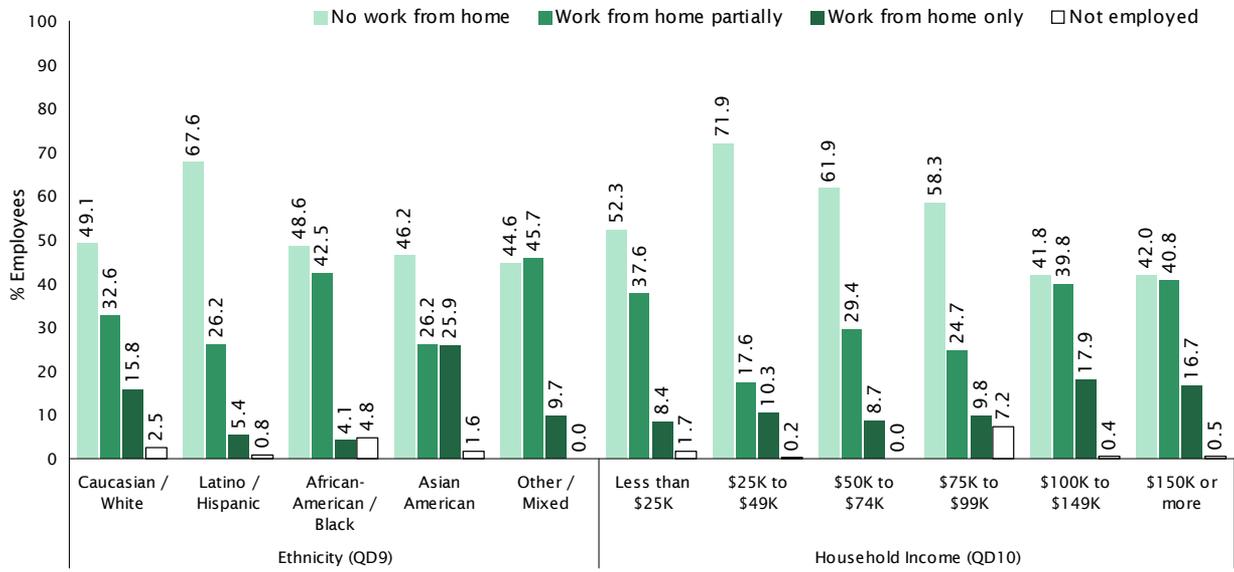


FIGURE 152 REMOTE WORK AFTER PANDEMIC BY SAN DIEGO COUNTY SUBREGION & NUMBER OF EMPLOYEES AT COMPANY

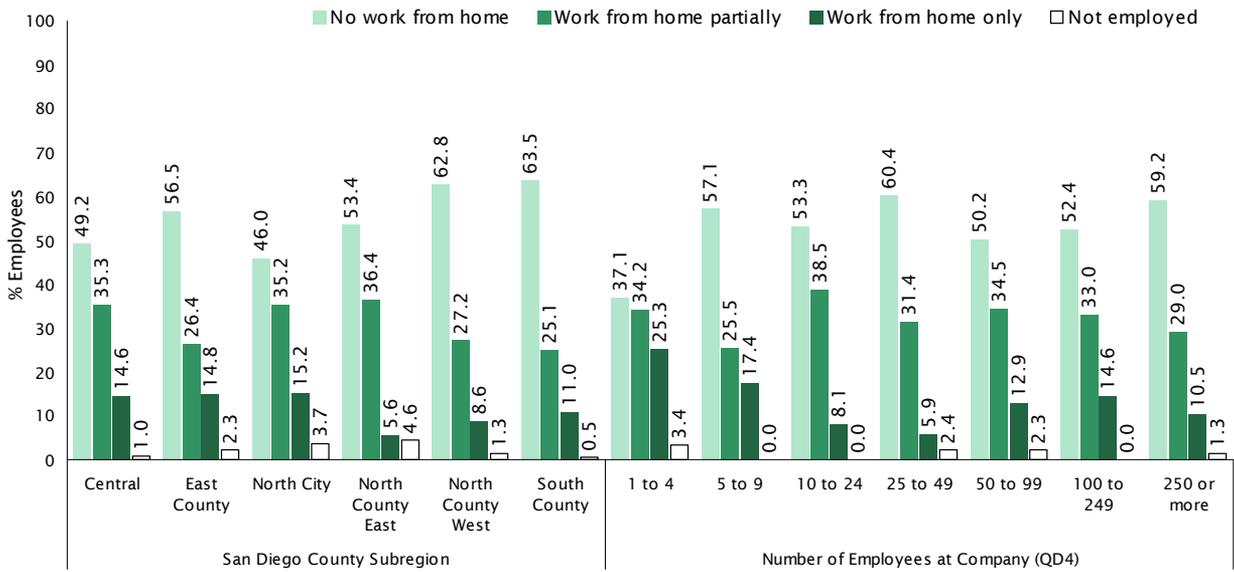


FIGURE 153 REMOTE WORK AFTER PANDEMIC BY INDUSTRY

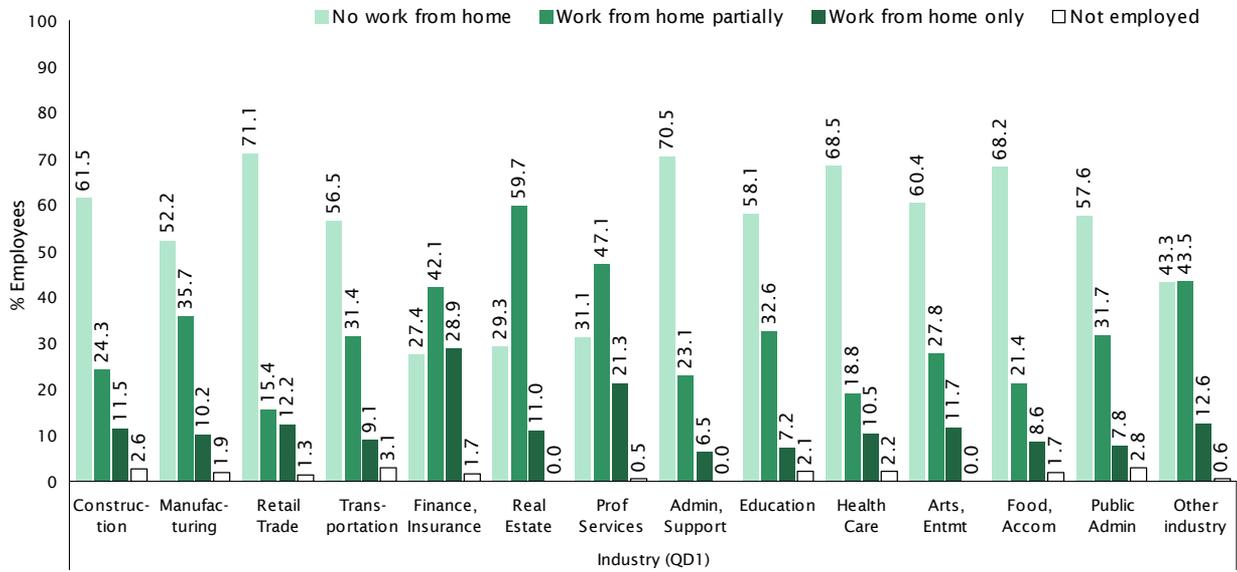
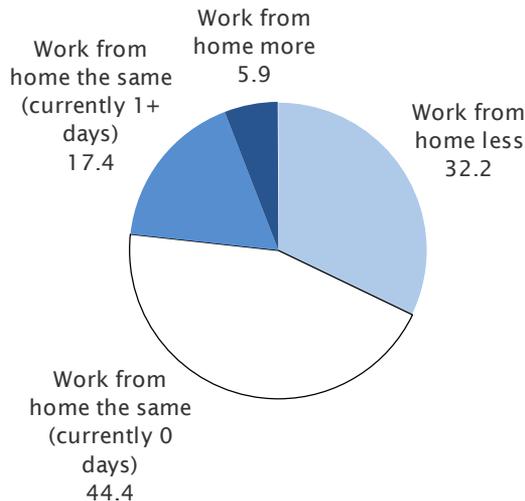


Figure 154 compares work arrangements during the pandemic vs. post-pandemic at the *individual* level. Approximately 44% of employees indicated that they currently do not work remotely, nor do they expect to work remotely once the pandemic is over. Employees who currently work remotely at least one day per week were divided between those who expect to work from home less often (32%), the same amount (17%), or more often (6%) after the pandemic when compared to their current schedule.

FIGURE 154 REMOTE WORK AFTER PANDEMIC 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 that they would work *less often* from home once the pandemic is over (see Figures 155-158).

FIGURE 155 REMOTE WORK AFTER PANDEMIC VS DURING PANDEMIC BY AGE, GENDER, INDEPENDENT CONTRACTOR & SURVEY LANGUAGE

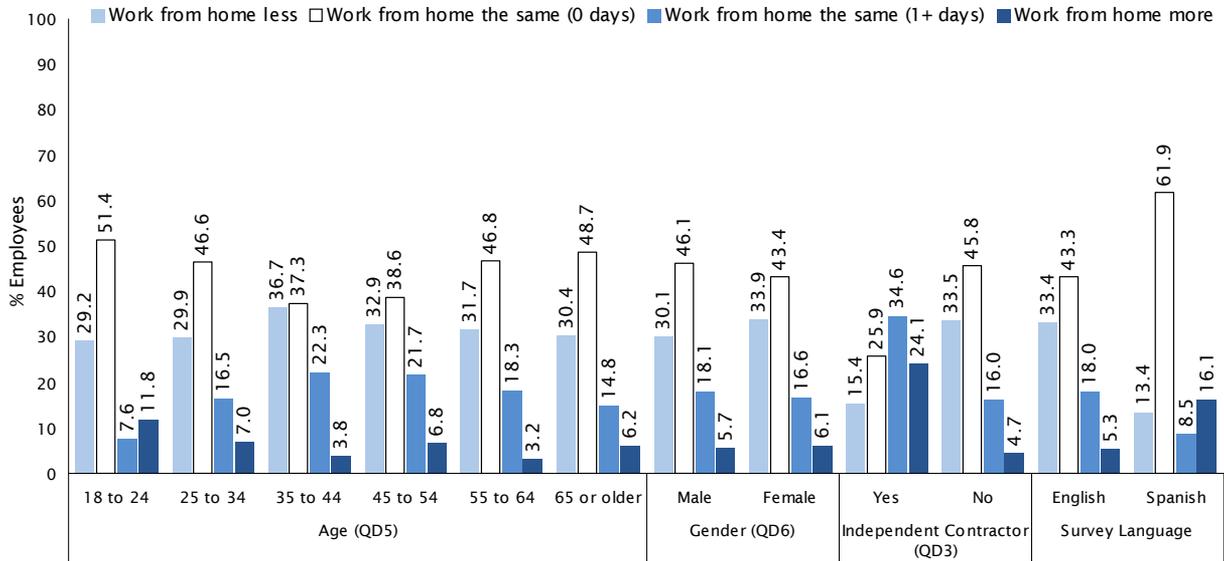


FIGURE 156 REMOTE WORK AFTER PANDEMIC VS DURING PANDEMIC BY ETHNICITY & HOUSEHOLD INCOME

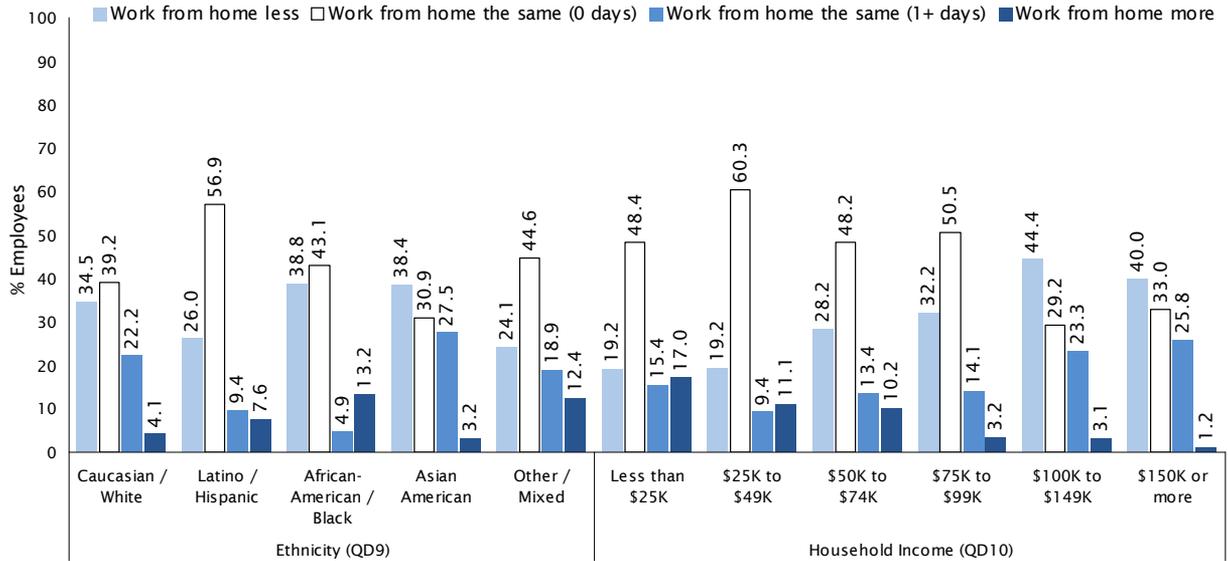


FIGURE 157 REMOTE WORK AFTER PANDEMIC VS DURING PANDEMIC BY SAN DIEGO COUNTY SUBREGION & NUMBER OF EMPLOYEES AT COMPANY

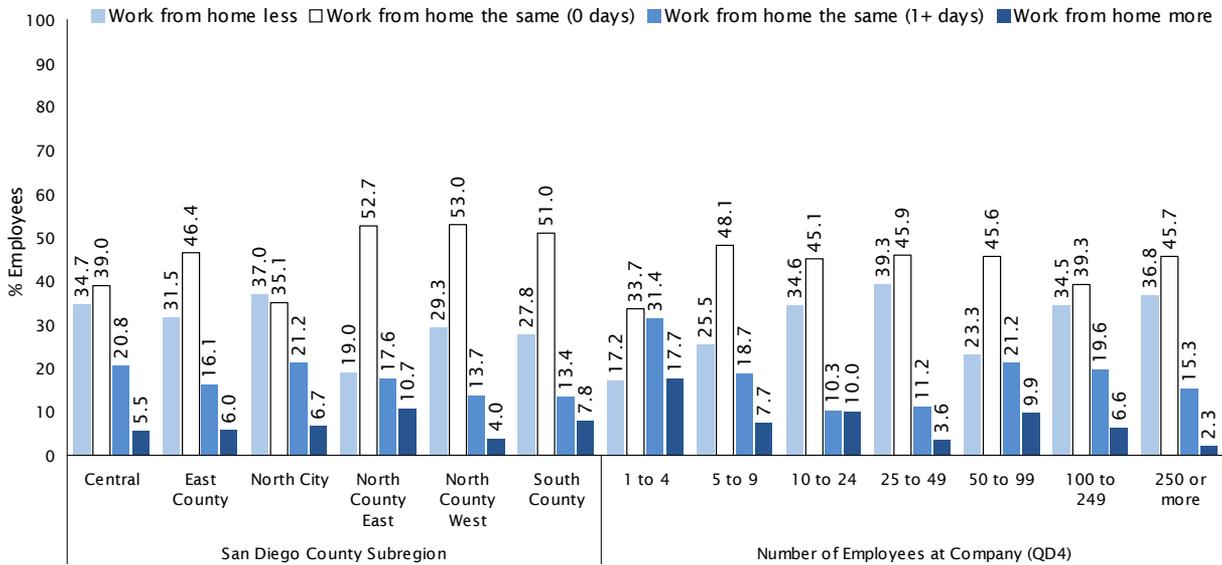
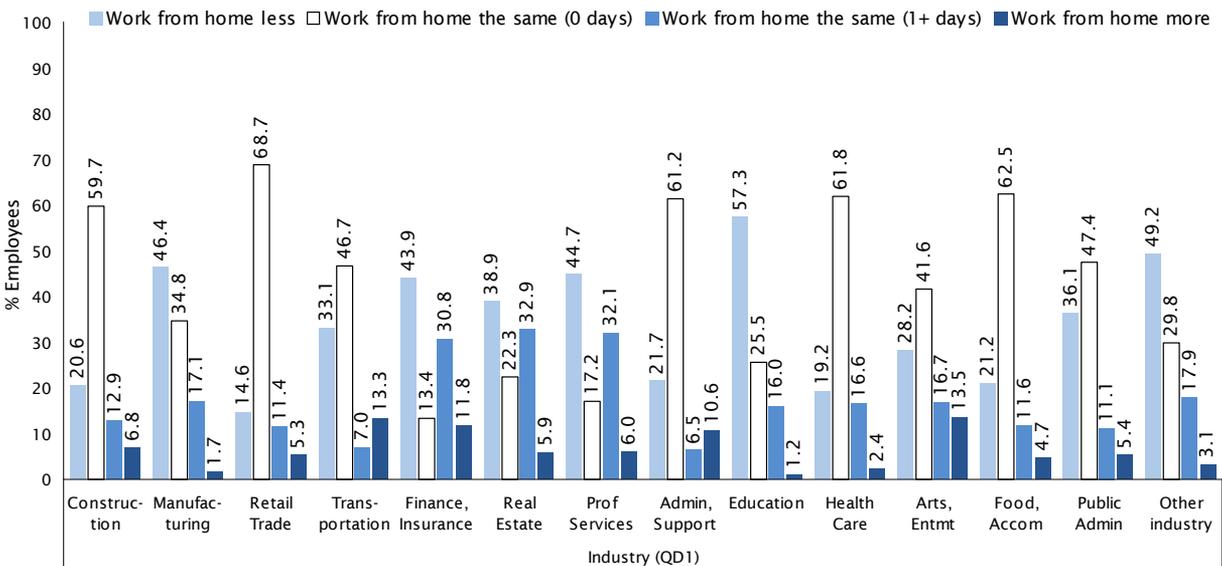


FIGURE 158 REMOTE WORK AFTER PANDEMIC VS DURING PANDEMIC BY INDUSTRY



WORKING REMOTE LESS AFTER PANDEMIC - WHOSE PREFERENCE? Employees who reported that they anticipate working fewer days from home after the pandemic when compared to their current 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 they are currently (Question 23). The answers to both questions are combined in Figure 159.

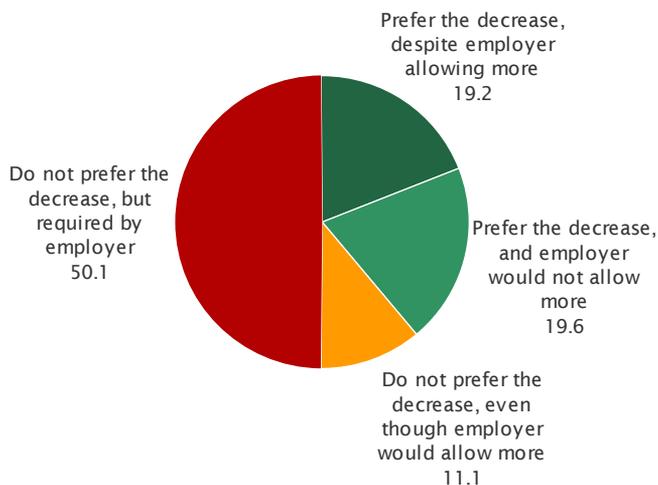
Half of the employees (50%) who indicated that they anticipated working remotely less often after the pandemic indicated that it was *not* their preference, but their employer required the change. An additional 11% indicated the change was not their preference and their employer did

not require a change, thus suggesting a separate factor was motivating their reduction in remote working.¹⁵ Approximately four-in-ten employees *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%).

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?*

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

FIGURE 159 OPINION OF WORKING FEWER DAYS FROM HOME AFTER PANDEMIC



NO CHANGE TO REMOTE WORK AFTER PANDEMIC - WHOSE PREFERENCE?

Employees who reported that they anticipate working the same number of days from home after the pandemic when compared to their current schedule¹⁶ 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 160.

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 current 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-in-five

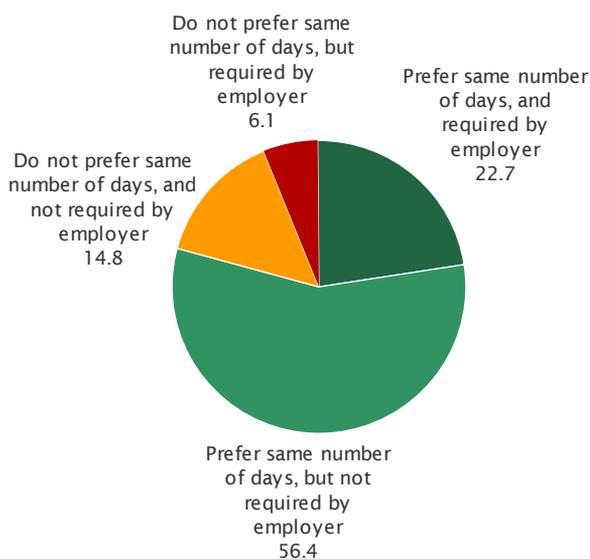
15. There are a variety of external factors that could compel an employee to reduce their remote work, including housing arrangements, a need to take children to/from school near their work location, difficulty sharing a home office with a spouse, etc.
 16. For clarity, employees who reported zero remote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

employees indicated 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%).¹⁷

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?*

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

FIGURE 160 OPINION OF WORKING SAME DAYS FROM HOME AFTER PANDEMIC



WORKING REMOTE MORE AFTER PANDEMIC - WHOSE PREFERENCE? Finally, employees who reported that they anticipate working more days from home after the pandemic when compared to their current 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 161.

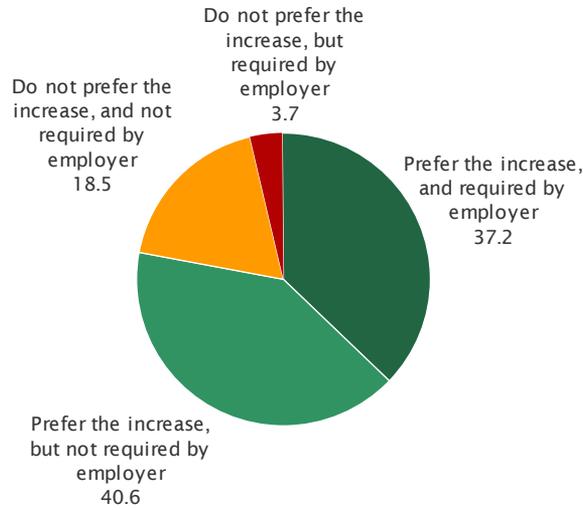
More than three-quarters of employees (78%) who anticipated working more days from home after the pandemic reported that it was their preference to do so, with this group being divided between those whose employers did not require remote work (41%) and those whose employers mandated that employees work 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.

¹⁷Note 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.

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?

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

FIGURE 161 OPINION OF WORKING MORE DAYS FROM HOME AFTER PANDEMIC



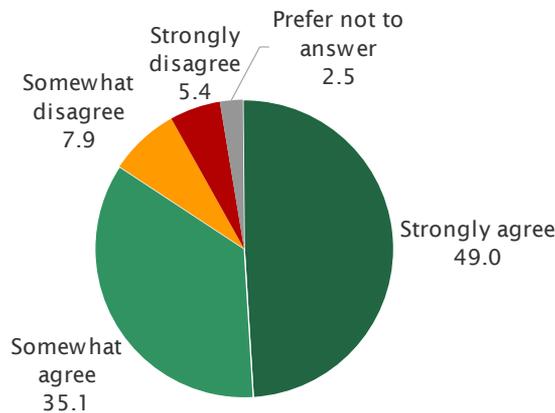
TRANSPORTATION SOLUTIONS

The final substantive question of the Employee Survey simply asked respondents the extent to which they agreed or disagreed with the following statement: *In order to give people better options for reaching their destinations in the San Diego region, we need to use technology to improve the flow of vehicles, invest in high-speed transit and local shuttles, and make it easier for people to connect from one type of transportation to another.*

As shown in Figure 162, there was widespread agreement with the need to use technology, invest in high-speed transit and local shuttles, and make multi-modal connections easier in order to improve mobility in the region, with 84% of respondents indicating that they strongly (49%) or somewhat (35%) agree with the statement. Approximately 13% disagreed with the statement, whereas 3% were unsure or preferred to not answer the question.

Question 28 Please tell me whether you agree or disagree with the following statement: *In order to give people better options for reaching their destinations in the San Diego region, we need to use technology to improve the flow of vehicles, invest in high-speed transit and local shuttles, and make it easier for people to connect from one type of transportation to another. Do you agree or disagree with this statement?*

FIGURE 162 NEED TO USE TECH, INVEST IN TRANSIT & IMPROVE MULTI-MODAL CONNECTIONS



Figures 163-166 show how agreement with the statement varied across a wide range of employee subgroups. Although certain subgroups (e.g., those 35 to 44 years of age, independent contractors, and those who primarily use transit) were more likely than their counterparts to strongly agree with the need to use technology, invest in high-speed transit and shuttles, and improve multi-modal connections, more than two-thirds of respondents in *every* subgroup agreed with the statement to some degree.

FIGURE 163 NEED TO USE TECH, INVEST IN TRANSIT & IMPROVE MULTI-MODAL CONNECTIONS BY AGE, GENDER & INDEPENDENT CONTRACTOR

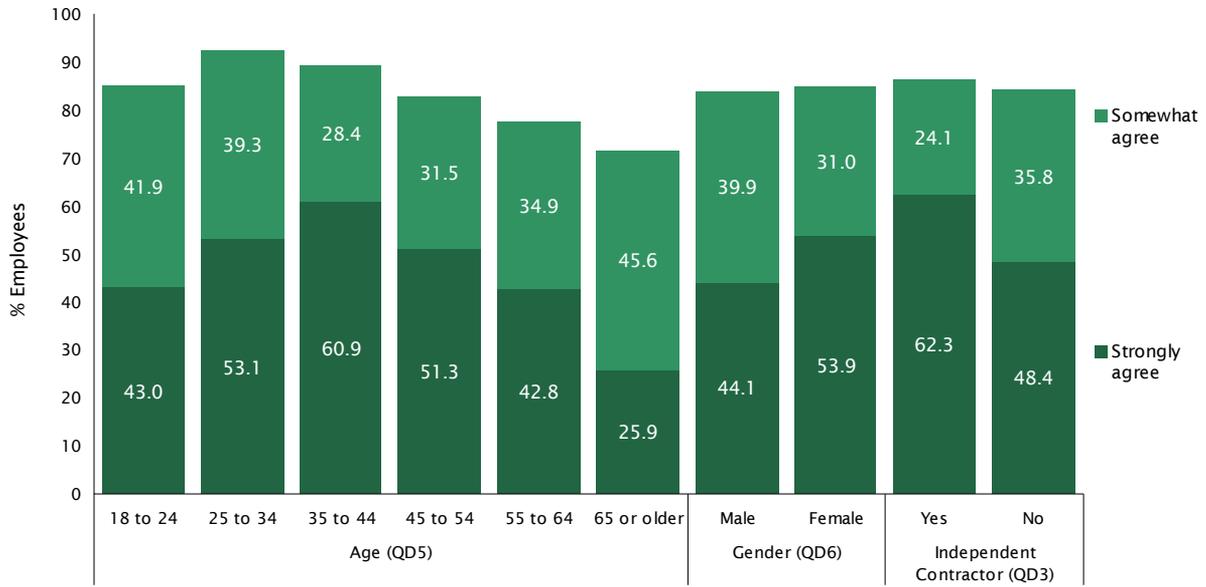


FIGURE 164 NEED TO USE TECH, INVEST IN TRANSIT & IMPROVE MULTI-MODAL CONNECTIONS BY ETHNICITY & HOUSEHOLD INCOME

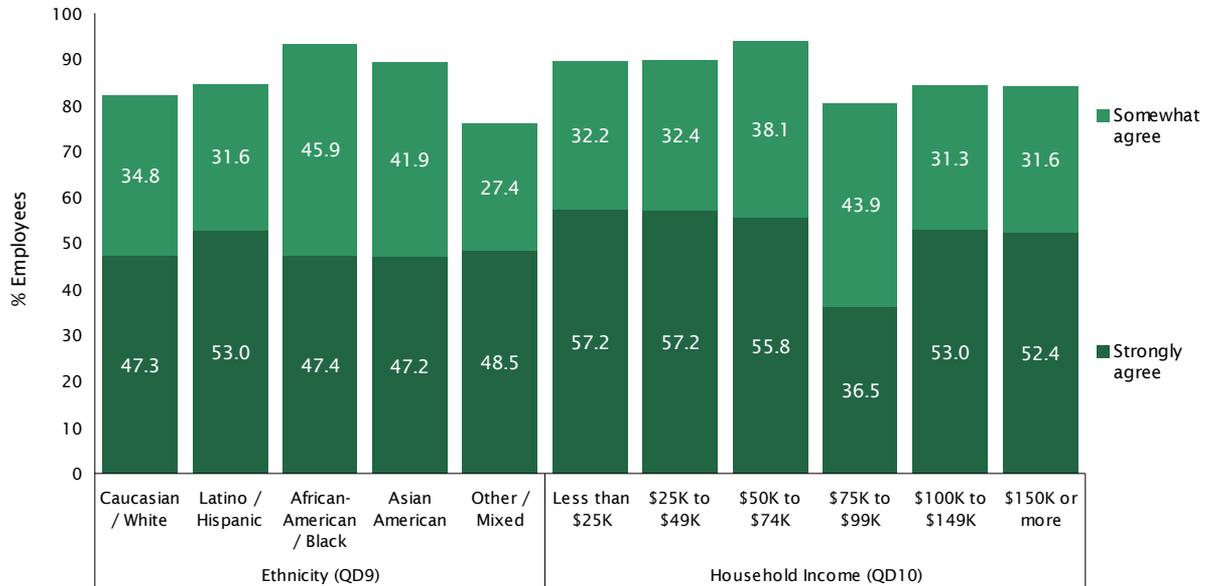


FIGURE 165 NEED TO USE TECH, INVEST IN TRANSIT & IMPROVE MULTI-MODAL CONNECTIONS BY SAN DIEGO COUNTY SUBREGION & NUMBER OF EMPLOYEES AT COMPANY

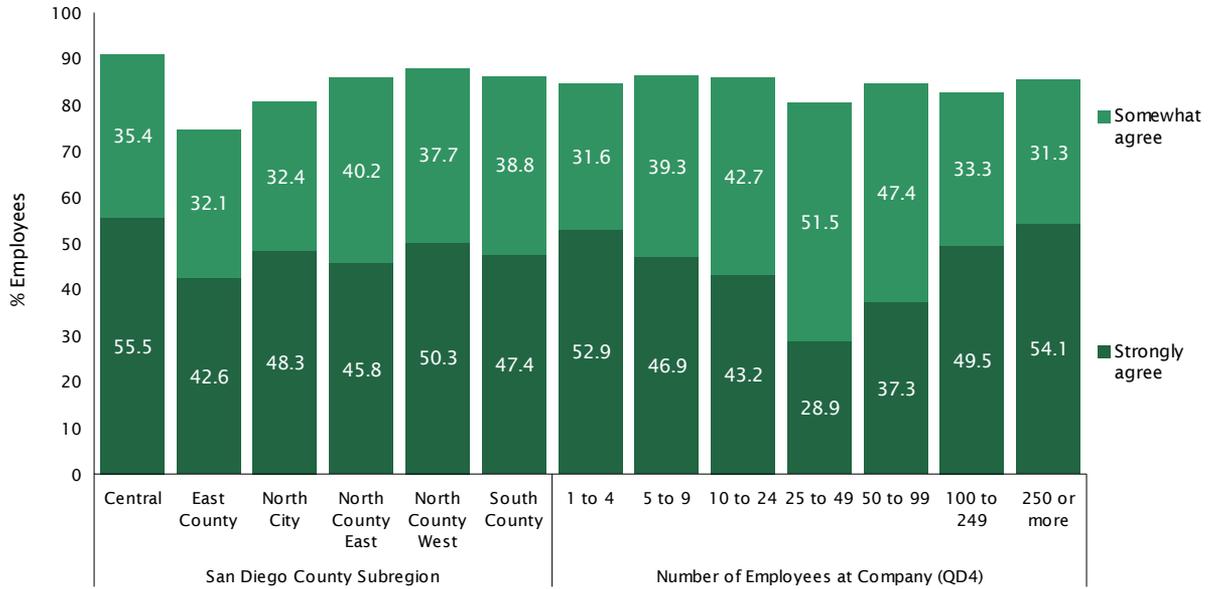
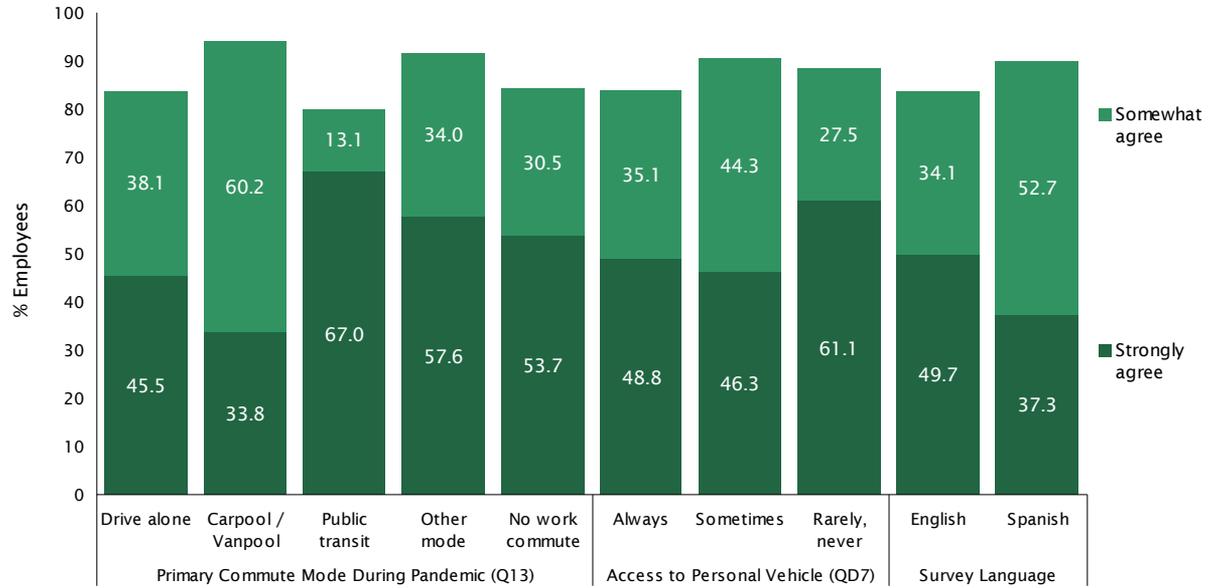


FIGURE 166 NEED TO USE TECH, INVEST IN TRANSIT & IMPROVE MULTI-MODAL CONNECTIONS BY PRIMARY COMMUTE MODE DURING PANDEMIC, ACCESS TO PERSONAL VEHICLE & SURVEY LANGUAGE





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 (with topline results) for both the Business Survey and Employee Survey can be found in the next section of this report (see *Questionnaires & Toplines* on page 105). 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.

Both 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 offered some employees the option to work from home prior to the pandemic (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) and at least three days per week (Question 4) prior to the pandemic. 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 167 on the next page, of the 146,506 known businesses in the region, most are either small businesses with less than five employees (53,414) or are classified as ‘unknown’ with respect to employee size (58,834). Approximately one-third of businesses are also classified as ‘unknown’ for industry (47,492), with the remaining businesses showing concentrations in Health Care and Social Assistance (29,969), Professional, Scientific and Technical Services (13,391), Retail Trade (8,665), Other Services (7,280), and Accommodation and Food Services (7,030).

FIGURE 167 NUMBER OF BUSINESSES IN SAN DIEGO REGION BY INDUSTRY & EMPLOYEE SIZE

NAICS Description	Number of Employees								Total
	Unknown	1-4	5-9	10-24	25-49	50-99	100-249	250+	
22 Utilities	5	23	10	6	4	0	1	1	50
31-33 Manufacturing	277	1,306	619	683	313	212	144	74	3,628
42 Wholesale Trade	417	1,993	736	611	207	95	43	12	4,114
44-45 Retail Trade	554	3,091	1,973	1,795	569	393	233	57	8,665
48-49 Transportation and Warehousing	214	811	315	320	140	85	47	21	1,953
51 Information	221	734	178	175	77	62	31	12	1,490
52 Finance and Insurance	773	3,114	959	707	181	100	56	16	5,906
53 Real Estate and Rental and Leasing	1,070	3,242	682	396	107	52	24	4	5,577
54 Professional, Scientific, and Technical Services	2,702	7,132	1,490	1,167	465	233	140	62	13,391
55 Management of Companies and Enterprises	23	132	59	69	44	34	41	18	420
56 Administrative and Support/Waste Management/Remediation Services	714	2,596	672	533	281	137	118	55	5,106
61 Educational Services	169	689	328	450	401	362	141	39	2,579
62 Health Care and Social Assistance	3,544	21,749	1,997	1,485	548	349	206	91	29,969
71 Arts, Entertainment, and Recreation	216	622	200	230	111	72	28	24	1,503
72 Accommodation and Food Services	335	1,246	1,255	2,435	1,146	432	133	48	7,030
81 Other Services (except Public Administration)	817	4,172	1,251	754	179	61	35	11	7,280
92 Public Administration	1	54	58	83	55	34	35	33	353
N/A Unknown	46,782	708	2	0	0	0	0	0	47,492
Total	58,834	53,414	12,784	11,899	4,828	2,713	1,456	578	146,506

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 8,377 businesses in the San Diego region (5% of all businesses in the region).

Although small businesses represent the vast majority of firms in the San Diego region, it's also the case that larger businesses account for a disproportionate share of total employment. Accordingly, rather than sample proportionately based on the number of businesses in each column shown in Figure 167, we stratified the sample by firm size and undersampled businesses with 1-4 and 5-9 employees by limiting these categories to approximately 100 interviews each. This strategy effectively oversampled for larger firms, with the remaining interviews distributed proportionately among the remaining firm size categories. Within firm size categories (columns), interviews were assigned proportionately across industries based on the number of firms in each industry.¹⁸ Businesses located in Tier 1 Employment Centers (Downtown, Sorrento Valley, and Kearny Mesa Employment Centers) were also oversampled.

Table 1 on the next page summarizes the sample plan for the Business Survey, 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 577 completed interviews among businesses.¹⁹

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

19. Among the industry categories, there were a few that didn't have the expected level of participation, but they also tended to be industries negatively impacted directly by the pandemic (Accommodation and Food Services and Retail Trade, in particular).

TABLE 1 COMPARISON OF BUSINESS UNIVERSE AND SAMPLE

	Completed			Universe ¹		Completed		Weighted
	Survey Goal	Survey Actual	Actual vs Goal	Universe ¹	Universe %	Survey Weighted	Weighted Sample %	Weighted Sample % vs Universe %
Number of Employees at Location								
1 to 4	99	118	+19	52,706	61%	354	61%	1%
5 to 9	100	114	+14	12,782	15%	87	15%	0%
10 to 24	166	200	+34	11,899	14%	79	14%	0%
25 to 49	69	67	-2	4,828	6%	32	6%	0%
50 to 99	37	47	+10	2,713	3%	14	2%	-1%
100 to 249	22	21	-1	1,456	2%	7	1%	0%
250 or more	7	10	+3	578	1%	4	1%	0%
<i>Total</i>	<i>500</i>	<i>577</i>	<i>+77</i>	<i>86,962</i>	<i>100%</i>	<i>577</i>	<i>100%</i>	
Tier 1 Employment Center								
Yes	100	119	+19	10,065	12%	63	11%	-1%
No	400	458	+58	76,897	88%	514	89%	1%
<i>Total</i>	<i>500</i>	<i>577</i>	<i>+77</i>	<i>86,962</i>	<i>100%</i>	<i>577</i>	<i>100%</i>	
NAICS/Industry								
22 Utilities	0	3	+3	45	0%	1	0%	0%
31-33 Manufacturing	27	63	+36	3,351	4%	27	5%	1%
42 Wholesale Trade	24	38	+14	3,697	4%	27	5%	0%
44-45 Retail Trade	64	45	-19	8,111	9%	52	9%	0%
48-49 Transportation and Warehousing	12	13	+1	1,739	2%	14	2%	0%
51 Information	6	12	+6	1,269	1%	8	1%	0%
52 Finance and Insurance	29	16	-13	5,133	6%	38	7%	1%
53 Real Estate and Rental and Leasing	19	19	+0	4,507	5%	45	8%	3%
54 Professional, Scientific, and Technical Services	54	113	+59	10,689	12%	69	12%	0%
55 Management of Companies and Enterprises	3	0	-3	397	0%	0	0%	0%
56 Administrative and Support/Waste Management/Remediation Services	26	30	+4	4,392	5%	27	5%	0%
61 Educational Services	24	44	+20	2,410	3%	12	2%	-1%
62 Health Care and Social Assistance	95	75	-20	26,425	30%	150	26%	-4%
71 Arts, Entertainment, and Recreation	9	19	+10	1,287	1%	13	2%	1%
72 Accommodation and Food Services	71	37	-34	6,695	8%	60	10%	3%
81 Other Services (except Public Administration)	34	39	+5	6,463	7%	31	5%	-2%
92 Public Administration	3	11	+8	352	0%	3	1%	0%
<i>Total</i>	<i>500</i>	<i>577</i>	<i>+77</i>	<i>86,962</i>	<i>100%</i>	<i>577</i>	<i>100%</i>	

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 2021. 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 DEMOGRAPHICS OF SAMPLE: EMPLOYEE

	Universe ²	Universe %	Completed Survey Weighted ³	Weighted Sample %	Weighted Sample % vs Universe %
San Diego County Subregion¹					
Central	314,126	20%	193	19%	0%
East County	248,861	15%	176	18%	2%
North City	415,729	26%	251	25%	-1%
North County East	40,711	3%	24	2%	0%
North County West	398,500	25%	242	24%	-1%
South County	189,775	12%	119	12%	0%
<i>Total</i>	<i>1,607,702</i>	<i>100%</i>	<i>1,006</i>	<i>100%</i>	
Age					
16-24	190,871	12%	112	12%	0%
25-34	414,030	26%	271	28%	3%
35-44	346,672	22%	203	21%	0%
45-54	323,823	20%	167	18%	-3%
55-64	251,122	16%	150	16%	0%
65+	81,184	5%	51	5%	0%
<i>Total</i>	<i>1,607,702</i>	<i>100%</i>	<i>954</i>	<i>100%</i>	
NAICS/Industry					
11 Agriculture	8,400	1%	3	0%	0%
22 Utilities	4,900	0%	11	1%	1%
23 Construction	81,900	6%	38	4%	-2%
31-33 Manufacturing	113,000	8%	88	10%	1%
42 Wholesale Trade	39,100	3%	5	1%	-2%
44-45 Retail Trade	138,500	10%	127	14%	4%
48-49 Transportation and Warehousing	29,100	2%	27	3%	1%
51 Information	21,700	2%	12	1%	0%
52 Finance and Insurance	45,500	3%	35	4%	0%
53 Real Estate and Rental and Leasing	28,400	2%	24	3%	1%
54 Professional, Scientific, and Technical Services	143,900	11%	88	10%	-1%
55 Management of Companies and Enterprises	23,800	2%	0	0%	-2%
56 Administrative and Support/Waste Management/Remediation Services	81,200	6%	39	4%	-2%
61 Educational Services	25,000	2%	37	4%	2%
62 Health Care and Social Assistance	184,000	14%	121	13%	0%
71 Arts, Entertainment, and Recreation	14,100	1%	20	2%	1%
72 Accommodation and Food Services	104,100	8%	44	5%	-3%
81 Other Services (except Public Administration)	39,700	3%	32	4%	1%
92 Public Administration	232,700	17%	164	18%	1%
<i>Total</i>	<i>1,359,000</i>	<i>100%</i>	<i>915</i>	<i>100%</i>	

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

2 Subregion and Age counts gathered from U.S. Census Bureau, 2015-2019 American Community Survey 5-Year Estimates; NAICS/Industry counts gathered from San Diego County Labor Force and Industry Employment Estimates for January 2021.

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 and/or telephone calls.²⁰ Individuals that received an email 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 an emailed invitation or that only had telephone contact information were recruited to participate in the survey by telephone (land line and/or cell phone).

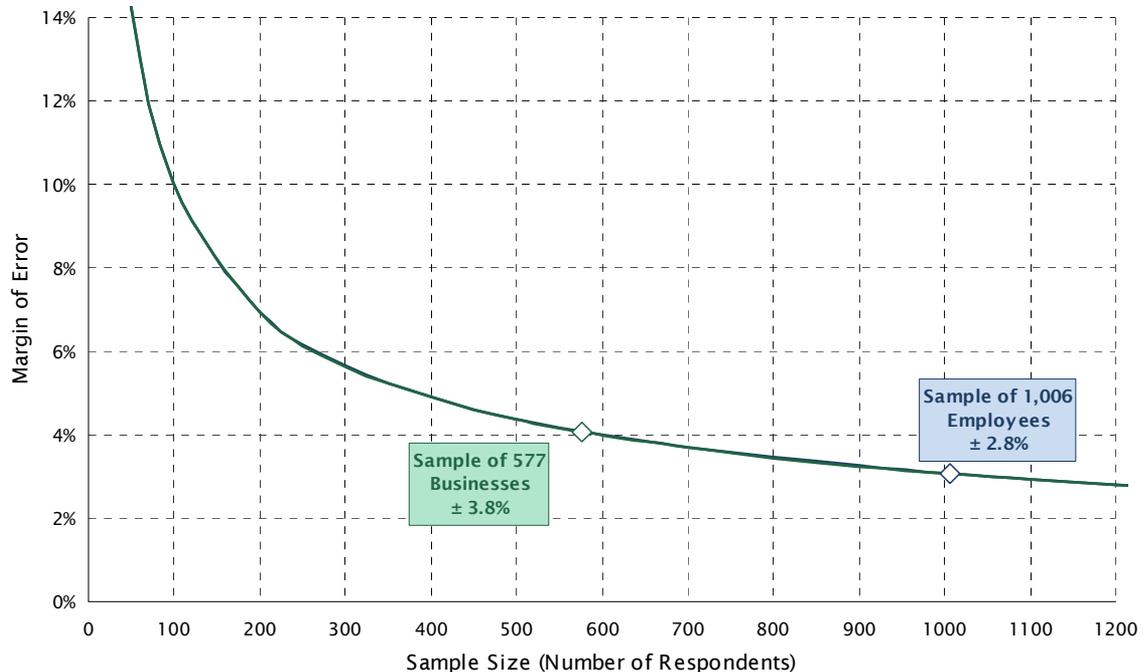
20. The recruiting method(s) selected for a respondent depended on the contact information that was available for that particular business or household.

Telephone interviews averaged 15 minutes in length for businesses and were conducted during normal business hours (9AM to 5PM) weekdays between February 17 and March 11, 2021. 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 February 23 and March 19, 2021.

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 1,006 employees for a particular question and what would have been found if all of the estimated 1,359,000 employees in the region had been surveyed.

Figure 168 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 1,006 respondents is $\pm 2.8\%$, whereas the maximum margin of error for questions answered by all 577 businesses is $\pm 3.8\%$.

FIGURE 168 MAXIMUM MARGIN OF ERROR



Within this report, figures and tables show how responses to certain questions varied by subgroups of businesses and employees. Figure 168 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, 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.

QUESTIONNAIRES & TOPLINES

BUSINESS SURVEY



SANDAG
 Remote Work - Business Survey
 Final Toplines (n = 577)
 March 26, 2021

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 may have been impacted by 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: _____?

<i>Read in order</i>		Yes	No	Prefer not to answer
A	In an executive position with your company	84%	16%	0%

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)	23%	76%	1%
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If SC1B = 1 they are qualified and can skip to intro preceding Q1. If SC1B = (2,99), ask SC1C and SC1D.

C	Very familiar with your company's policies and practices when it comes to remote work, also known as teleworking	100%	0%	0%
---	--	------	----	----

D	Knowledgeable about how the pandemic has impacted the number of employees at your company who are working remotely	100%	0%	0%
---	--	------	----	----

If SC1C = 1 and SC1D = 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 and how the pandemic may have impacted the number of employees working from home. Can you direct me to this person?

Summary of Respondent's Position/Role to Qualify for Survey (SC1A-SC1D)

Executive position	83%
Director, senior HR position	4%
Very familiar with company's telework and knowledgeable about pandemic impacts	13%

Section 3: Remote Work Pre-Pandemic

For this first set of questions, I'd like you to think back to January and February 2020 - **before the pandemic started.**

Q1 Before the pandemic started, were some employees at your company given the **option** to work from home at least one day per week?
If respondent prefers not to answer/doesn't know (99), ask: The questions in this survey will focus on your organization's remote work policies and practices. Are you able and willing to provide this information? If no, terminate. If yes, repeat question Q1.

1	Yes	27%	Ask Q2
2	No	73%	Skip to intro preceding Q5
99	Prefer not to answer/Not sure	0%	See instruction above

Q2 Approximately what percentage of your company's employees had 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%	73%
1% to 24%	7%
25% to 49%	2%
50% to 74%	3%
75% or more	14%
Prefer not to answer	1%

Q3 Before the pandemic started, approximately what percentage of your company's employees actually **worked 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%	79%
1% to 24%	8%
25% to 49%	2%
50% to 74%	2%
75% or more	9%
Prefer not to answer	0%

If Q3 = 0%, skip to intro preceding Q5.

Q4	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? 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 Q3 coded here as 0%.	
	0%	87%
	1% to 24%	5%
	25% to 49%	1%
	50% to 74%	1%
	75% or more	6%
	Prefer not to answer	0%

Section 4: Remote Work - Pandemic Patterns

Next, I'd like to ask about your company's **current** practices - during the pandemic.

Q5	Currently, are some employees at your company given the option to work from home at least one day per week?			
	1	Yes	47%	Ask Q6
	2	No	53%	Skip to Q9
Q6	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 Q5 coded here as 0%.			
	0%	53%		
	1% to 24%	11%		
	25% to 49%	1%		
	50% to 74%	7%		
	75% or more	27%		
	Prefer not to answer	0%		

Q7	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 Q5 coded here as 0%.	
	0%	57%
	1% to 24%	11%
	25% to 49%	3%
	50% to 74%	7%
	75% or more	22%
	Prefer not to answer	0%
<i>If Q7 = 0%, skip to intro preceding instruction preceding Q9.</i>		
Q8	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 Q5 or 0% at Q7 coded here as 0%.	
	0%	62%
	1% to 24%	11%
	25% to 49%	4%
	50% to 74%	4%
	75% or more	18%
	Prefer not to answer	1%

Section 5: Barriers to Remote Work

Ask Q9 if Q5 = 2.

Q9	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	77%
	Required equipment, technology, machinery is onsite	10%
	Small company, minimal staff, need to be onsite	7%
	Business closed due to COVID	2%
	Not busy, not enough work	1%
	Productivity, accountability issues	1%
	Clients prefer face-to-face, in-person	1%
	Prefer not to answer	3%

Ask Q10 if Q7 < 80% AND Q7 <= Q3 (current % working from home is less than 80% AND equal or less than pre-pandemic levels). Do not ask Q10 if Q5 = 2.

Q10	Is there a particular reason why the percentage of employees working from home didn't increase during the pandemic?	
		Verbatim answers for 28 respondents recorded and on file

Section 6: Impacts of Remote Work

Ask Q11 if (Q7 > 0% and Q1 = 2) or (Q7 > Q3). Otherwise skip to instruction preceding Q12.

Q11	You indicated that the percentage of employees who are working from home at least one day per week has <i>increased</i> 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? Percentages below are among the 33% of respondents that reported increased teleworking in the past year.		
	1	More productive	9%
	2	Less productive	34%
	3	Productivity hasn't changed	51%
	98	Not sure	6%
	99	Prefer not to answer	0%

Ask Q12 if Q7 > 0%. If Q7 = (0% or Prefer not to answer) skip to intro preceding Q18.

Q12 through Q17 asked of the 43% of respondents that reported at least some employees currently teleworking at Q7.

Q12	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.	
	Communication	23%
	Personal interactions, no in-person meetings	21%
	No challenges, drawbacks	17%
	Productivity	15%
	Technology (Internet connection, printer, file access)	7%
	Collaboration, teamwork, workflow	6%
	Team synergy, brainstorming	5%
	Camaraderie	5%
	Reduction in customer service	5%
	Morale	4%
	Time management	4%
	Employee availability, accessibility	3%
	Not sure / Cannot think of anything	3%
	Supervision	2%
	Personal, home challenges, schedules	1%

Q13	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.							
	Increase in productivity, efficiency	24%						
	Flexibility	16%						
	No benefits	16%						
	Health, safety of employees	14%						
	Reduced expenses, overhead	11%						
	Less commute, travel	9%						
	Employee satisfaction	8%						
	Less stress	4%						
	Improved employee morale	4%						
	Work-life balance	4%						
	Easier to focus, fewer interruptions	3%						
	Business survival, continuity through pandemic	3%						
	Not sure / Cannot think of anything	3%						
	Fewer parking issues	2%						
	Ability to retain, support employees	1%						
Q14	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: _____? <i>If helped or hurt, ask: Would you say it has (helped/hurt) a lot or somewhat?</i>							
	<i>Randomize</i>	Helped a lot	Helped somewhat	No impact	Hurt somewhat	Hurt a lot	Not Sure	Prefer not to answer
A	Employee morale	11%	25%	24%	32%	5%	3%	1%
B	Teamwork	7%	13%	27%	44%	9%	1%	0%
C	Communication and coordination	3%	6%	31%	50%	9%	1%	0%
D	The ability to meet deadlines	5%	15%	50%	19%	6%	1%	3%
E	The quality of work	2%	14%	56%	23%	3%	2%	0%
F	Business expenses	18%	24%	37%	11%	4%	4%	1%
G	The ability to identify and manage poor performing employees	2%	5%	47%	28%	10%	8%	1%
H	The ability to retain good employees	13%	23%	53%	7%	2%	2%	1%
I	Profitability	10%	9%	45%	17%	15%	3%	1%
J	Data security	0%	5%	71%	13%	3%	6%	2%
K	Your company's ability to hire people who live in the San Diego region	1%	15%	73%	4%	2%	5%	0%
L	Your company's ability to hire people who don't live in the San Diego region	10%	10%	66%	2%	1%	9%	2%

Q15		In response to more employees working from home, has your business: ____?		
<i>Randomize</i>		Yes	No	Prefer not to answer
A	Reduced its building square footage, or made plans to do so	19%	79%	3%
B	Terminated building leases, or made plans to do so	18%	79%	3%
C	Improved communications hardware or software	55%	44%	1%
D	Purchased technology such as computers, printers or phones for employees to keep at home	54%	45%	2%
E	Changed its data security processes	33%	64%	3%
F	Expanded its online presence	39%	59%	2%
G	Experienced problems because some employees have poor Internet access at home	38%	60%	1%
Q16		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	26%	
	2	No	68%	
	98	Not sure	4%	
	99	Prefer not to answer	2%	
Q17		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?		
	1	Yes	22%	
	2	No	75%	
	98	Not sure	3%	
	99	Prefer not to answer	0%	

Section 7: Post-Pandemic Plans

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.

Q18 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?

1	Yes	40%	Ask Q19
2	No	60%	Skip to Q23

Q19 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? Percentage recorded in 5% increments and later grouped into categories shown below. All respondents summarized here, with those who said No at Q18 coded here as 0%.

0%	60%
1% to 24%	10%
25% to 49%	5%
50% to 74%	5%
75% or more	19%
Prefer not to answer	1%

Q20 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? Percentage recorded in 5% increments and later grouped into categories shown below. All respondents summarized here, with those who said No at Q18/Q5 coded here as 0%.

0%	64%
1% to 24%	10%
25% to 49%	5%
50% to 74%	6%
75% or more	15%
Prefer not to answer	1%

If Q20 = 0%, skip to intro preceding Q23.

Q21	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? Percentage recorded in 5% increments and later grouped into categories shown below. All respondents summarized here, with those who previously said No at Q18 or 0% at Q20 coded here as 0%.		
	0%	72%	
	1% to 24%	9%	
	25% to 49%	4%	
	50% to 74%	5%	
	75% or more	10%	
	Prefer not to answer	0%	
Q22	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? Responses shown below for 36% of businesses that allow/expect employees to work from home at least one day per week after the pandemic is over.		
	1	Yes	26%
	2	No	73%
	99	Prefer not to answer	2%

Section 8: Company Characteristics

I have just a few more background questions about your business for statistical purposes.

Q23	Thinking of full-time <i>and</i> part-time employees, approximately how many people does your company employ in San Diego County? Number of employees recorded and grouped into the categories below.	
	1 to 4	29%
	5 to 9	25%
	10 to 24	24%
	25 to 49	10%
	50 to 99	5%
	100 to 249	2%
	250 or more	3%
	Prefer not to answer	1%

Q24	What industry is your company a part of? <i>If hesitates, ask: What does your company do?</i> Verbatim responses recorded and grouped into the NAICS codes and categories shown below.		
	22	Utilities	0%
	31-33	Manufacturing	5%
	42	Wholesale Trade	5%
	44-45	Retail Trade	9%
	48-49	Transportation and Warehousing	2%
	51	Information	1%
	52	Finance and Insurance	7%
	53	Real Estate and Rental and Leasing	8%
	54	Professional, Scientific, and Technical Services	13%
	55	Management of Companies and Enterprises	0%
	56	Administrative and Support and Waste Management and Remediation Services	5%
	61	Educational Services	2%
	62	Health Care and Social Assistance	24%
	71	Arts, Entertainment, and Recreation	2%
	72	Accommodation and Food Services	10%
	81	Other Services (except Public Administration)	5%
	92	Public Administration	1%
Q25	Is there free employee parking at your business location, or do employees generally pay for parking?		
	1	Free parking for employees	95%
	2	Pay for parking	4%
	99	Prefer not to answer	1%
Q26	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	87% Skip to Q28
	98	Does not want the \$10 eGift card	9% Skip to Q28
	99	Prefer not to share email	4% Ask Q27

Only ask Q27 if Q26 = 99.

Q27	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. <i>If needed:</i> We need an email or a mobile phone number in order to distribute the \$10 eGift card.	
	Mobile number recorded	73%
98	Does not want the \$10 eGift card	8%
99	Prefer not to share mobile phone	19%
Q28	Would your business be interested in receiving support from SANDAG in developing and implementing a remote work program?	
1	Yes	14%
2	No	83%
99	Prefer not to answer	3%

Post-Interview & Sample Items

S1	Number of Employees at Location	
	1 to 4	61%
	5 to 9	15%
	10 to 24	14%
	25 to 49	6%
	50 to 99	2%
	100 to 249	1%
	250 or more	1%
S2	Employment Center	
	Downtown	4%
	Sorrento Valley	3%
	Kearny Mesa	4%
	Not Employment Center	89%

EMPLOYEE SURVEY



SANDAG
Remote Work - Employee Survey
Final Toplines (n = 1,006)
March 26, 2021

Section 1: Introduction to Study

Standard Intro: Hi, may I please speak to: _____. Hi, my name is _____ and I'm calling from TNR on behalf of 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	70%	Ask Q1
2	Employed part-time	18%	Ask Q1
3	Self-employed	13%	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 & Pandemic

Q1	To begin, how long have you lived in San Diego County?	
1	Less than 1 year	4%
2	1 to 2 years	5%
3	3 to 4 years	6%
4	5 to 9 years	14%
5	10 to 14 years	9%
6	15 years or longer	60%
99	Prefer not to answer	3%

Q2	Which comes closer to your view about where San Diego County stands in the coronavirus pandemic: the worst is behind us OR the worst is yet to come?		
	1	Worst is behind us	65%
	2	Worst is yet to come	12%
	98	Not sure	22%
	99	Prefer not to answer	1%

Section 4: Pre-Pandemic Employment & Commute

We're interested in how your employment and commute may have changed in response to the coronavirus outbreak. For this first set of questions, I'd like you to think back to January and February 2020 - **before the pandemic started**.

Q3	Before the pandemic started, which best describes your employment status? Were 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	68%	Ask Q4
	2	Employed part-time	14%	Ask Q4
	3	Self-employed	9%	Ask Q4
	4	Laid-off/furloughed	2%	Skip to Q9
	5	In between jobs	1%	Skip to Q9
	6	Student	4%	Skip to Q9
	7	Homemaker	1%	Skip to Q9
	8	Retired	1%	Skip to Q9
	99	Prefer not to answer	1%	Skip to Q9
Q4	Before the pandemic started, how many days per week did you typically work?			
	1	One	2%	
	2	Two	2%	
	3	Three	6%	
	4	Four	7%	
	5	Five	69%	
	6	Six	10%	
	7	Seven	4%	

Q5	Of the < insert from Q4 > work days per week you typically worked, how many of these days did you primarily work from home ?	
	0	Zero 74%
	1	One 7%
	2	Two 5%
	3	Three 3%
	4	Four 2%
	5	Five 6%
	6	Six 1%
	7	Seven 1%
	99	Prefer not to answer 1%
<i>Ask Q6 if Q5 > 0.</i>		
Q6	Of the < insert from Q5 > days you <i>primarily</i> worked from home, how many days did 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 Q5 coded here as 0.	
	0	Zero 78%
	1	One 8%
	2	Two 4%
	3	Three 2%
	4	Four 2%
	5	Five 5%
	6	Six 0%
	7	Seven 1%
	99	Prefer not to answer 0%
<i>Ask Q7 if number days reported in Q5 < Q4 OR Q6 < Q5.</i>		
Q7	When you commuted to a work destination outside of your home before the pandemic, how did you typically commute to work? <i>If they say they used multiple transportation methods, ask: Which did you use for the <u>longest</u> portion of your commute?</i> <i>If they say drive, car, etc. ask: Did you most often drive by yourself or with other people in the vehicle?</i>	
	1	Drive alone (car, truck, SUV, or van) 85%
	2	Carpool (ride together 2 to 4 people) 4%
	3	Vanpool (ride together with 5 to 15 people) 1%
	4	Motorcycle/Moped 1%
	5	E-bike/electric scooter 0%
	6	On-demand rideshare service like Uber or Lyft 1%

7	Taxi	0%
Public Transit		
8	Bus	3%
9	Trolley	2%
10	Coaster	0%
11	Sprinter	0%
12	Other public transit	0%
13	Bicycle	1%
14	Walk/jog/run	2%
15	Other	0%
99	Prefer not to answer	0%
<i>Ask Q8 if Q5 = 0. Otherwise skip to intro preceding Q9.</i>		
Q8	Prior to the pandemic, did your employer give you the option to work from home at least one day per week? All respondents employed before the pandemic summarized below, with those who said they worked remotely at Q5Q1 coded here as Yes.	
1	Yes	33%
2	No	66%
98	Not sure	1%
99	Prefer not to answer	0%

Section 5: Pandemic Period Employment & Commute

For this next set of questions, please describe your **current situation** - during the pandemic.

Q9	Currently, how many days per week do you typically work?	
1	One	4%
2	Two	5%
3	Three	8%
4	Four	8%
5	Five	63%
6	Six	7%
7	Seven	4%

Q10	Of the < insert from Q9 > work days per week you typically work, how many of these days do you primarily work from home?		
	0	Zero	46%
	1	One	6%
	2	Two	6%
	3	Three	6%
	4	Four	5%
	5	Five	27%
	6	Six	1%
	7	Seven	2%
	99	Prefer not to answer	1%
<i>Ask Q11 if Q10 > 0.</i>			
Q11	Of the < insert from Q10 > days you <i>primarily</i> 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 Q10 coded here as 0.		
	0	Zero	49%
	1	One	7%
	2	Two	5%
	3	Three	6%
	4	Four	4%
	5	Five	24%
	6	Six	1%
	7	Seven	2%
	99	Prefer not to answer	1%
<i>Ask Q12 if Q10 = 0. Otherwise skip to instruction preceding Q13.</i>			
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 Q10 coded here as Yes.		
	1	Yes	59%
	2	No	39%
	98	Not sure	1%
	99	Prefer not to answer	1%

Ask Q13 if number days reported in Q10 < Q9 OR Q11 < Q10.

Q13	When you commute to a work destination outside of your home, how do you typically commute to work? <i>If they say they use multiple transportation methods, ask: Which do you use for the <u>longest</u> portion of your commute?</i>	
	<i>If they say drive, car, etc. ask: Do you most often drive by yourself or with other people in the vehicle?</i>	
	1	Drive alone (car, truck, SUV, or van) 82%
	2	Carpool (ride together 2 to 4 people) 4%
	3	Vanpool (ride together with 5 to 15 people) 1%
	4	Motorcycle/Moped 1%
	5	E-bike/electric scooter 0%
	6	On-demand rideshare service like Uber or Lyft 2%
	7	Taxi 0%
	Public Transit	
	8	Bus 3%
	9	Trolley 1%
	10	Coaster 0%
	11	Sprinter 0%
	12	Other public transit 0%
	13	Bicycle 0%
	14	Walk/jog/run 3%
	15	Other 1%
	99	Prefer not to answer 1%

Section 6: Remote Work Experience

Ask questions in this section if currently works from home at least 1 day per week (Q10 > 0).

Q14	Next are a few questions about your experiences working from home during the past year. In general, do you find that working from home has helped, had no impact, or hurt: _____? <i>If helped or hurt, ask: Would you say it has (helped/hurt) a lot or somewhat?</i>							
	<i>Randomize</i>	Helped a lot	Helped somewhat	No Impact	Hurt somewhat	Hurt a lot	Not Sure	Prefer not to answer
A	Your satisfaction with your job	27%	17%	33%	14%	5%	2%	1%
B	Your ability to collaborate with other employees	15%	12%	30%	28%	11%	2%	1%
C	Your ability to communicate with other employees	15%	10%	35%	28%	10%	1%	1%
D	The quality of your work	23%	20%	35%	15%	3%	3%	2%

Section 7: Pandemic Period Travel & Activities

All respondents receive Q18.

Q18 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?*

	<i>Randomize</i>	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	33%	32%	24%	4%	3%	1%	3%
B	Having food or groceries delivered to your home	19%	18%	28%	4%	7%	1%	24%
C	Driving to the grocery store	8%	9%	45%	20%	15%	1%	3%
D	Driving for work trips	7%	5%	26%	8%	33%	2%	20%
E	Driving for social events or activities	4%	5%	14%	14%	57%	1%	5%
F	Driving to parks, beaches, or other locations for recreation	7%	14%	23%	18%	33%	1%	5%
G	Driving for errands	7%	7%	40%	22%	20%	2%	3%
H	Driving kids to activities, events or school	4%	5%	13%	6%	22%	1%	49%

Section 8: Remote Work Post-Pandemic

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.

Q19 After the pandemic is over, how many days per week do you expect to work?

1	One	1%	
2	Two	3%	
3	Three	6%	
4	Four	7%	
5	Five	69%	
6	Six	9%	
7	Seven	3%	
8	None / Plan to retire, not work after pandemic	2%	Skip to Q28

Q20	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. All respondents summarized below, with those who said they plan not to work at Q19 coded here as 0.		
	0	Zero	56%
	1	One	8%
	2	Two	9%
	3	Three	10%
	4	Four	3%
	5	Five	10%
	6	Six	1%
	7	Seven	1%
	99	Prefer not to answer	1%
<i>Skip to Q28</i>			
<i>Ask Q21 if Q20 > 0.</i>			
Q21	Of the < insert from Q20 > days you will <i>primarily</i> work from home, 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 Q19 or Zero/None at Q20 coded here as 0.		
	0	Zero	59%
	1	One	10%
	2	Two	8%
	3	Three	9%
	4	Four	3%
	5	Five	9%
	6	Six	1%
	7	Seven	1%
	99	Prefer not to answer	1%
<i>Ask Q22 if Q20 < Q10. Otherwise skip to instruction preceding Q24.</i>			
Q22	You indicated that you expect to work <i>fewer</i> days from home after the pandemic when compared to your current schedule. Is this because you <i>prefer</i> to reduce the number of days you work from home?		
	1	Yes	38%
	2	No	58%
	99	Prefer not to answer	4%
Q23	After the pandemic, will your employer <i>allow</i> you to continue working from home < insert Q10 > days per week?		
	1	Yes	27%
	2	No	63%
	99	Prefer not to answer	10%
<i>Ask Q24 if Q20 = Q10. Otherwise skip to instruction preceding Q26.</i>			

Q24	You indicated that you expect to work the <i>same</i> number of days from home after the pandemic when compared to your current schedule. Is this because you <i>prefer</i> to keep the number of days you work from home the same?		
	1	Yes	52%
	2	No	43%
	99	Prefer not to answer	4%
Q25	Has your employer indicated that - after the pandemic - employees <i>must</i> work from home at least part of the time?		
	1	Yes	10%
	2	No	88%
	99	Prefer not to answer	2%
<i>Ask Q26 if Q20 > Q10. Otherwise skip to intro preceding Q28.</i>			
Q26	You indicated that you expect to work <i>more</i> days from home after the pandemic when compared to your current schedule. Is this because you <i>prefer</i> to increase the amount of days you work from home?		
	1	Yes	77%
	2	No	21%
	99	Prefer not to answer	3%
Q27	Has your employer indicated that - after the pandemic - employees <i>must</i> work from at least part of the time?		
	1	Yes	39%
	2	No	55%
	99	Prefer not to answer	6%

Section 9: Background & Demographics

Thank you so much for your participation. I have just a few background questions for statistical purposes.

Q28	Please tell me whether you agree or disagree with the following statement: In order to give people better options for reaching their destinations in the San Diego region, we need to use technology to improve the flow of vehicles, invest in high-speed transit and local shuttles, and make it easier for people to connect from one type of transportation to another.		
	Do you agree or disagree with this statement? <i>Get answer, then ask:</i> Would that be strongly (agree/disagree) or somewhat (agree/disagree)?		
	1	Strongly agree	49%
	2	Somewhat agree	35%
	3	Somewhat disagree	8%
	4	Strongly disagree	5%
	99	Prefer not to answer	3%

D1	What industry do you currently work in? <i>If hesitates, ask: What does your company do?</i> Verbatim responses recorded and grouped into the NAICS codes and categories shown below.		
	11	Agriculture	0%
	22	Utilities	1%
	23	Construction	4%
	31-33	Manufacturing	9%
	42	Wholesale Trade	1%
	44-45	Retail Trade	13%
	48-49	Transportation and Warehousing	3%
	51	Information	1%
	52	Finance and Insurance	3%
	53	Real Estate and Rental and Leasing	2%
	54	Professional, Scientific, and Technical Services	9%
	55	Management of Companies and Enterprises	0%
	56	Administrative and Support and Waste Management and Remediation Services	4%
	61	Educational Services	4%
	62	Health Care and Social Assistance	12%
	71	Arts, Entertainment, and Recreation	2%
	72	Accommodation and Food Services	4%
	81	Other Services (except Public Administration)	3%
	92	Public Administration	16%
	99	Prefer not to answer	9%
D2	What is your current occupation ? <i>If hesitates, ask: What type of work do you do?</i> Verbatim responses recorded and grouped into the SOC codes and categories shown below.		
	11	Management Occupations	16%
	13	Business and Financial Operations Occupations	8%
	15	Computer and Mathematical Occupations	4%
	17	Architecture and Engineering Occupations	4%
	19	Life, Physical, and Social Science Occupations	2%
	21	Community and Social Service Occupations	0%
	23	Legal Occupations	2%

25	Educational Instruction and Library Occupations	3%
27	Arts, Design, Entertainment, Sports, and Media Occupations	2%
29	Healthcare Practitioners and Technical Occupations	6%
31	Healthcare Support Occupations	2%
33	Protective Service Occupations	4%
35	Food Preparation and Serving Related Occupations	3%
37	Building and Grounds Cleaning and Maintenance Occupations	1%
39	Personal Care and Service Occupations	2%
41	Sales and Related Occupations	8%
43	Office and Administrative Support Occupations	9%
45	Farming, Fishing, and Forestry Occupations	0%
47	Construction and Extraction Occupations	3%
49	Installation, Maintenance, and Repair Occupations	2%
51	Production Occupations	1%
53	Transportation and Material Moving Occupations	3%
55	Military Specific Occupations	1%
99	Prefer not to answer	13%
<i>Ask D3 if SC1=3 OR SC2=3. Otherwise skip to D4.</i>		
D3	Do you work as an independent contractor?	
1	Yes	54%
2	No	38%
99	Prefer not to answer	8%

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	5%
	5	50 to 99	7%
	6	100 to 249	9%
	7	250 or more	48%
	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	11%
		25 to 34	27%
		35 to 44	20%
		45 to 54	17%
		55 to 64	15%
		65 or older	5%
		Prefer not to answer	5%
D6	What is your gender?		
	1	Male	47%
	2	Female	51%
	3	Other	1%
	99	Prefer not to answer	1%
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	84%
	2	Sometimes	8%
	3	Rarely	3%
	4	Never	4%
	99	Prefer not to answer	1%

D8	Do you have school-aged children who are taking their classes at home due to their school campuses being closed during the pandemic?	
	1	Yes 28%
	2	No 70%
	99	Prefer not to answer 2%
D9	What ethnic group do you consider yourself a part of or feel closest to? <i>Read list if respondent hesitates</i>	
	1	Caucasian/White 45%
	2	Latino/Hispanic 33%
	3	African-American/Black 6%
	4	American Indian or Alaskan Native 0%
	5	Asian -- Korean, Japanese, Chinese, Vietnamese, Filipino or other Asian 13%
	6	Pacific Islander 1%
	7	Middle Eastern 1%
	8	Mixed Heritage 0%
	98	Other 0%
	99	Prefer not to answer 1%
D10	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 6%
	2	\$25,000 to less than \$50,000 17%
	3	\$50,000 to less than \$75,000 16%
	4	\$75,000 to less than \$100,000 15%
	5	\$100,000 to less than \$150,000 18%
	6	\$150,000 or more 19%
	98	Not sure 2%
	99	Prefer not to answer 8%
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	19%
	East County	18%
	North City	25%
	North County East	2%
	North County West	24%
	South County	12%
S2	Survey Language	
	1 English	94%
	2 Spanish	6%