



EMPLOYMENT & TRAVEL SURVEY: TRACKING ORANGE COUNTY COMMUTE TRENDS

BACKGROUND

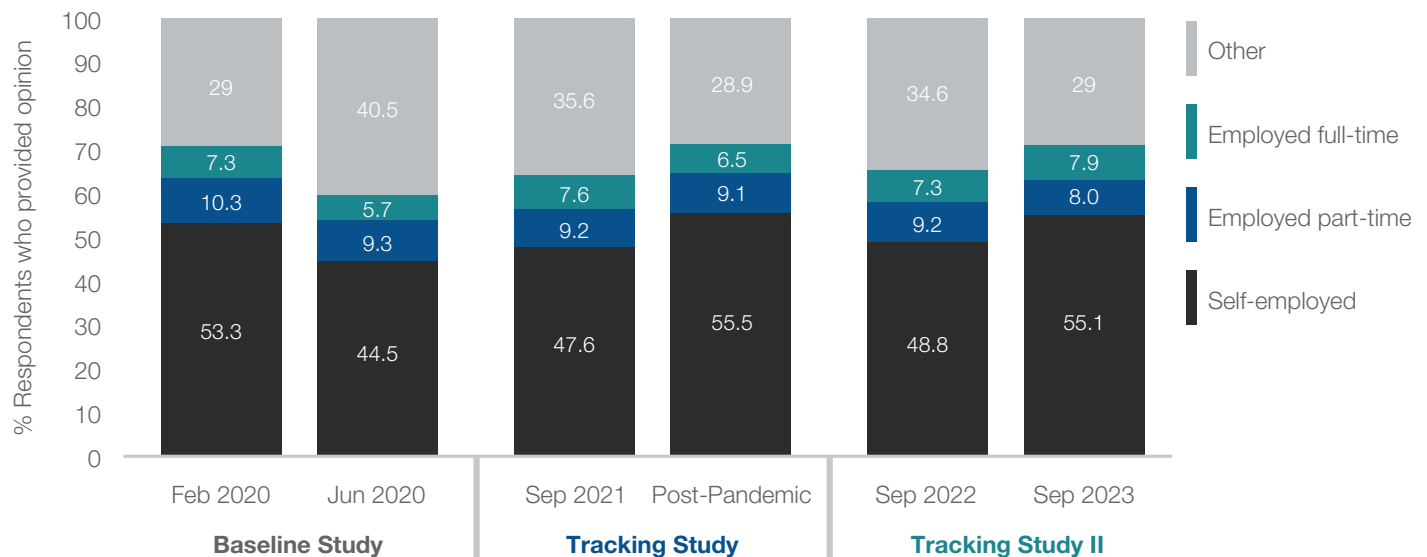
To understand the coronavirus (COVID-19) pandemic's impacts on public attitudes, working arrangements, and travel behaviors, OCTA has conducted three statistically reliable surveys. Reflecting findings from September 2022, the most recent survey is part of a series begun in July 2020 and continued in September 2021. A key focus is to gauge how teleworking and travel patterns have been altered due to the pandemic and to help inform future transportation planning efforts.

In June 2020, the coronavirus pandemic/COVID-19 was identified as the most important issue facing Orange County by more than one-third (34%) of respondents. Fast forward to September 2022, and less than 1% mentioned COVID-19 or the pandemic. They instead focused on homelessness (25%), housing availability/affordability (18%), public safety/drugs/crime (11%), cost of living (9%), traffic congestion (9%) and public transportation (5%).

EMPLOYMENT IMPACT

The baseline survey in 2020 revealed that Orange County residents experienced significant job losses. Full-time employment declined 9% between February and June 2020. More than a year later (September 2021), the first tracking survey indicated that although employment had rebounded in Orange County from the early months of the pandemic, it remained depressed when compared to pre-pandemic levels.

Employment Status: Feb 2020, Jun 2020, Sep 2021 & Post-Pandemic Expectations, Sep 2022 & Sep 2023 Expectations



The 2022 tracking survey results reveal that little has changed over the past year in terms of employment. The percentage of individuals employed full-time (49%), part-time (9%), or self-employed (7%) is strikingly similar to that found in 2021. As was the case in 2021, however, respondents in 2022 were optimistic about their future employment, expecting that one year from now the levels of employment (55% full-time, 8% part-time, 8% self-employed) would be similar to pre-pandemic levels.

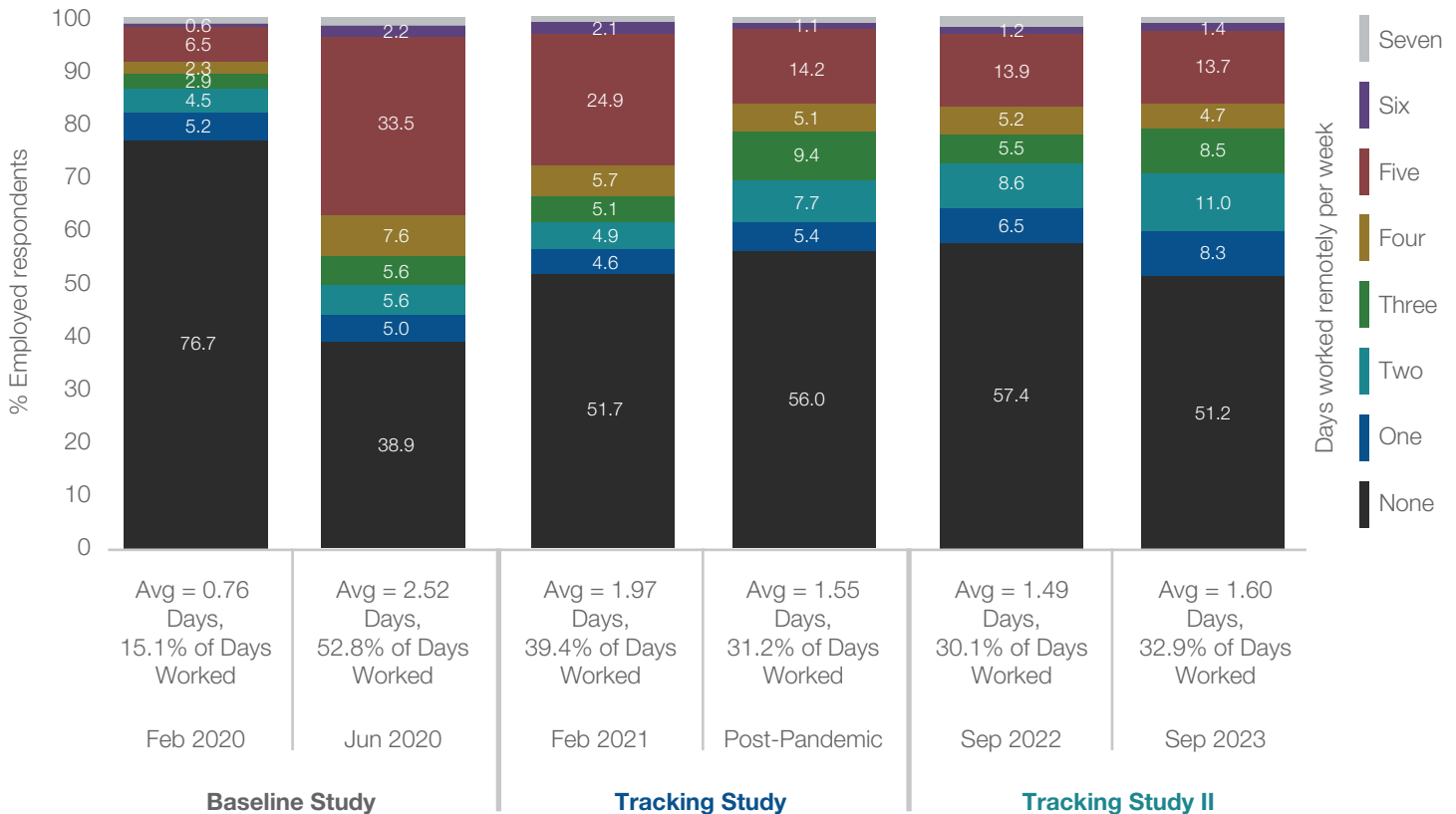
TELEWORK IS THE NEW NORMAL

According to the most recent survey, the percentage working from home one or more days per week settled in at 43% by September 2022, 20 points higher than February 2020's measurement of 23%. The average number of work-from-home days in September 2022 (1.49) is double pre-pandemic levels (0.76).

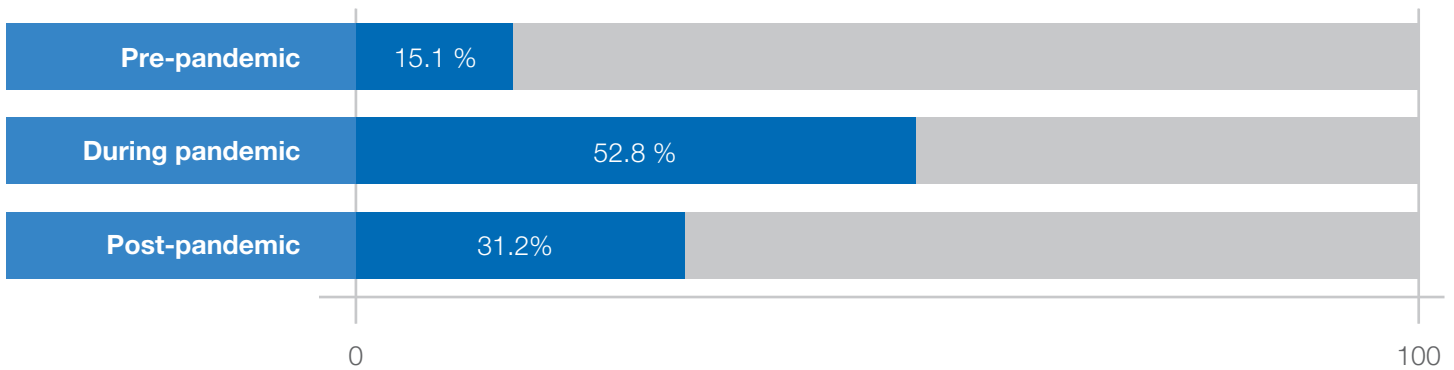
Previously reported work-from-home information:

Feb 2020, pre-pandemic:	Jun 2020:	September 2021:
23% worked from home at least one day per week, with an overall average of 0.76 days per week working from home.	61% worked from home at least one day per week, and the average number of days working from home jumped to 2.52 per week.	48% worked from home at least one day per week, with the average number of days worked from home per week being 1.97.

Telework Days per Week: Feb 2020, Jun 2020, Sep 2021 & Post-Pandemic Expectations, and Sep 2022 and Sep 2023 Expectations



Percentage of Days Teleworked



COMMUTE MODE IMPACT

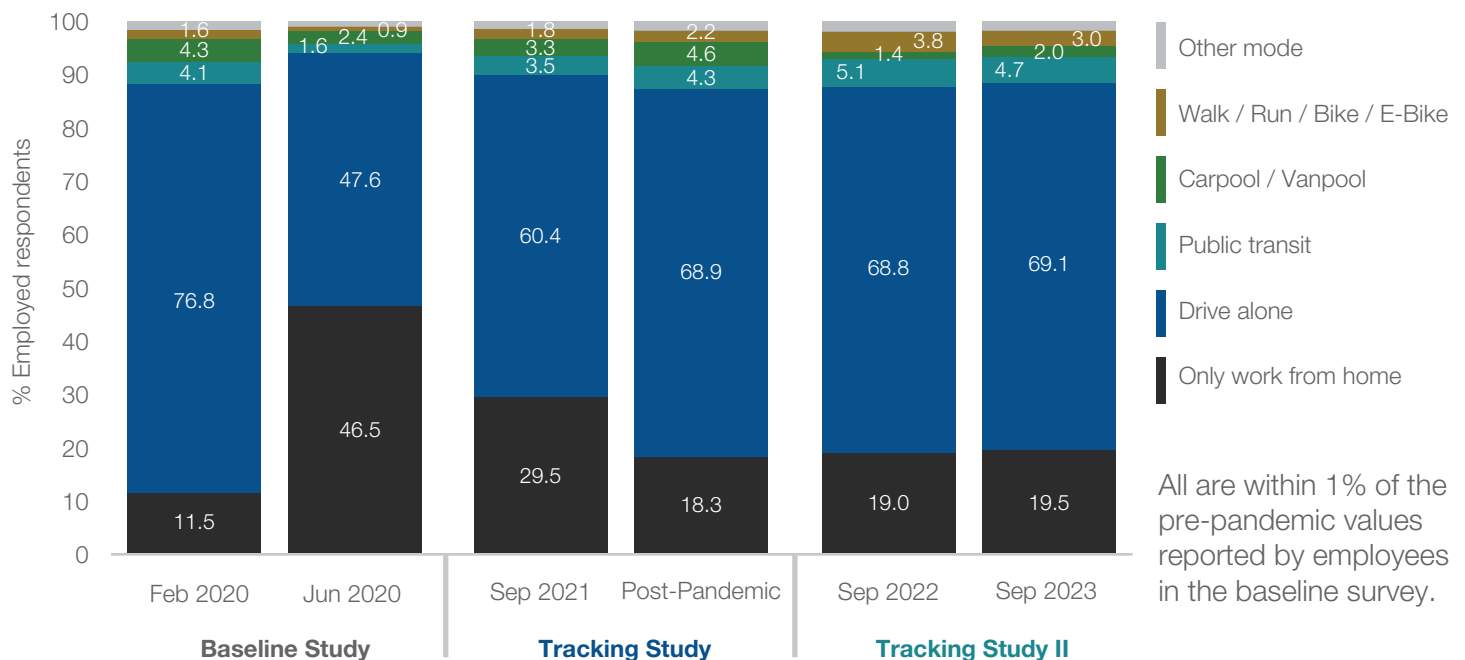
Interestingly, the 2022 survey also reveals that some employees aspire to increase the days they work from home over the next year, as the average expected number of days worked from home one year from now (September 2023) is 1.60.

The dramatic increase in remote working that occurred in the initial months of the pandemic had a direct impact on commute patterns in Orange County. By September 2021, many workers had resumed their commutes to a work location outside of their home (at least once per week), although the amount of work taking place in the home remained well above pre-pandemic levels.

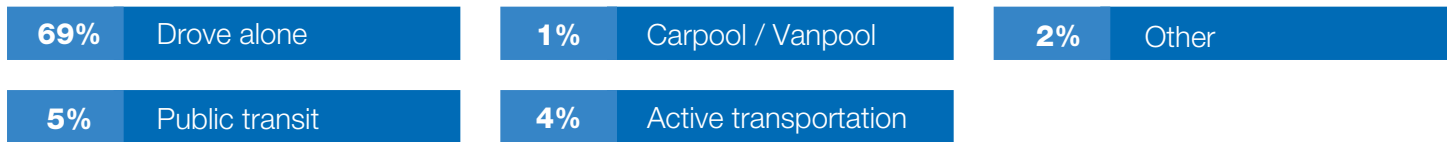
In September 2021, employees anticipated they would use these commute modes:



Commute Mode: Feb 2020, Jun 2020, Sep 2021 & Post-Pandemic Expectations, and Sep 2022 and Sep 2023 Expectations



September 2022 patterns are nearly identical to what employees forecast in 2021 for the post-pandemic period. Of the 81% of employees who commuted to work in September 2022:

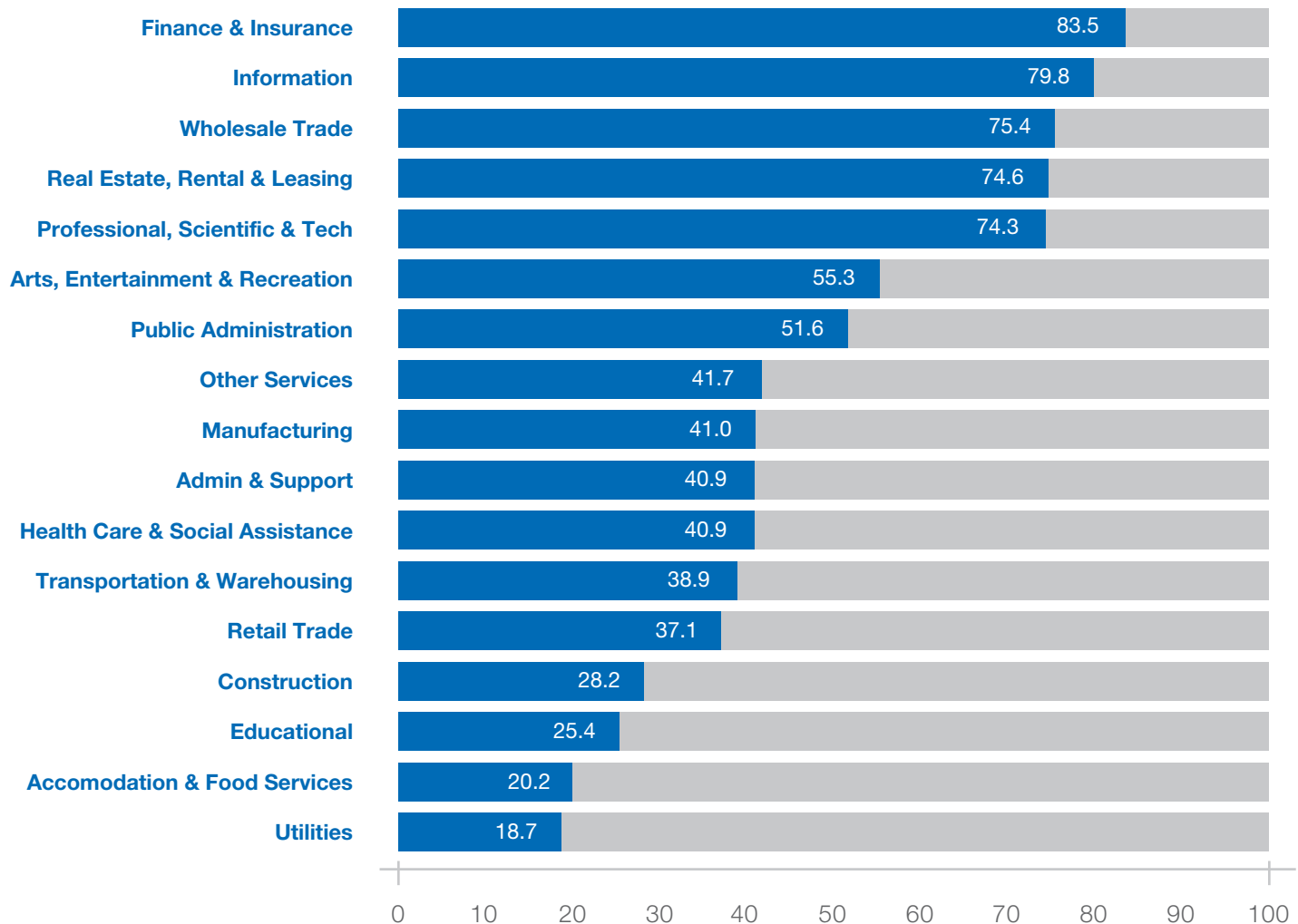


Employees also anticipated that these mode choice patterns would hold over the next year, with expectations for September 2023 being nearly identical to the current period.

INDUSTRY IMPACT

The transition to remote work in Orange County has not been consistent across industries. As of September 2022, far more office professionals reported that their employers allow them the option to work from home when compared to those working in manual or skilled labor positions. At the extremes, more than three-quarters of employees working in legal, business and financial, computer and math science positions reported that their employers allow them to work from home, compared to less than 10% of employees in protective services and construction positions.

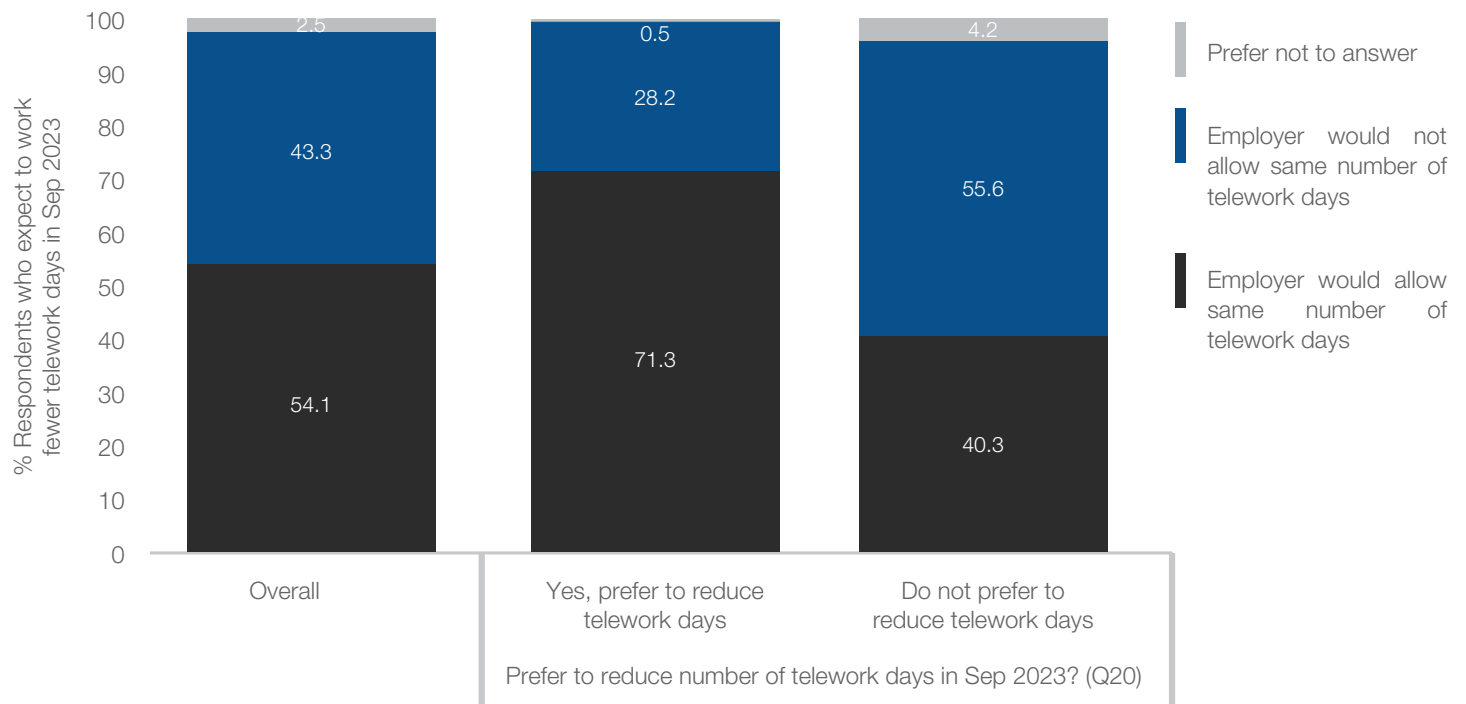
Telework Option September 2022 by Industry



WORKING FEWER DAYS FROM HOME

Employees who indicated they anticipated working fewer days from home one year from now were subsequently asked if their employer would allow them to continue working from home the same number of days as their current schedule. Only 54% of respondents answered yes, their employer would allow them to continue working from home as often as they do currently. (54%). Among those who anticipated working fewer days from home in 2023 and preferred to do so, most (71%) indicated that their employer would have allowed them to continue working from home as often as their current schedule. Conversely, those who anticipated working less from home in the future and did not prefer this outcome were far more likely (56%) to report that their employer would not allow them to continue working from home as often as they do currently.

Fewer Telework Days Next Year (September 2023): Employer Requirement vs. Employee Preference



TELEWORK EMPLOYER ASSISTANCE

OCTA will continue to monitor remote work trends in Orange County and promote telework to employers and employees in the region through OC Rideshare. OCTA recently expanded its OC Rideshare telework website and offers a telework assistance program to employers to help them develop and implement a formal telework policy.

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