



Post-Pandemic Trends



Phase 1 Survey Results

February 26, 2025



Methodology

Objective – Understand commuter travel, work satisfaction, and work-from-home trends, policies, and preferences both currently and moving forward from among both area employees and employers.

		Sampling Approach	Sample Size	Means of completing survey
	Employees	Address-based sample and online panel (random sample)	1,630	Online and telephone
	Employers	Promoted through BMC outreach to committees and organizations (non-probability sample)	77	Online

Sample Size

Employee County	TOTAL	CFG Geography	Round 10 Forecast Employment 2025
Baltimore	533	Baltimore	411,260
Baltimore City	433	Baltimore City	377,443
Anne Arundel	237	Anne Arundel	375,489
Howard	186	Howard	193,976
Harford	131	Harford	110,606
Carroll	91	Carroll	64,313
Queen Anne's	19	Queen Anne's	16,775
Total Answering	1,630		

Sample Demographics

Education: 60% of employees hold a bachelor's degree or higher, with 29% having a graduate degree.

Household Composition: 64% of employees come from households with no children.

Household Income: 31% of households earn \$150,000 or more annually, with a median income of \$99,870.

Housing Type: 52% of employees live in detached single-family homes.

Age: The average employee age is 47, with 28% aged 55-64

Gender: 55% of employees identify as female, 44% as male, and 1% as non-binary.

Race/Ethnicity: 59% of employees identify as White/Caucasian, while 41% identify as People of Color (POC).

Question Topics: Employees

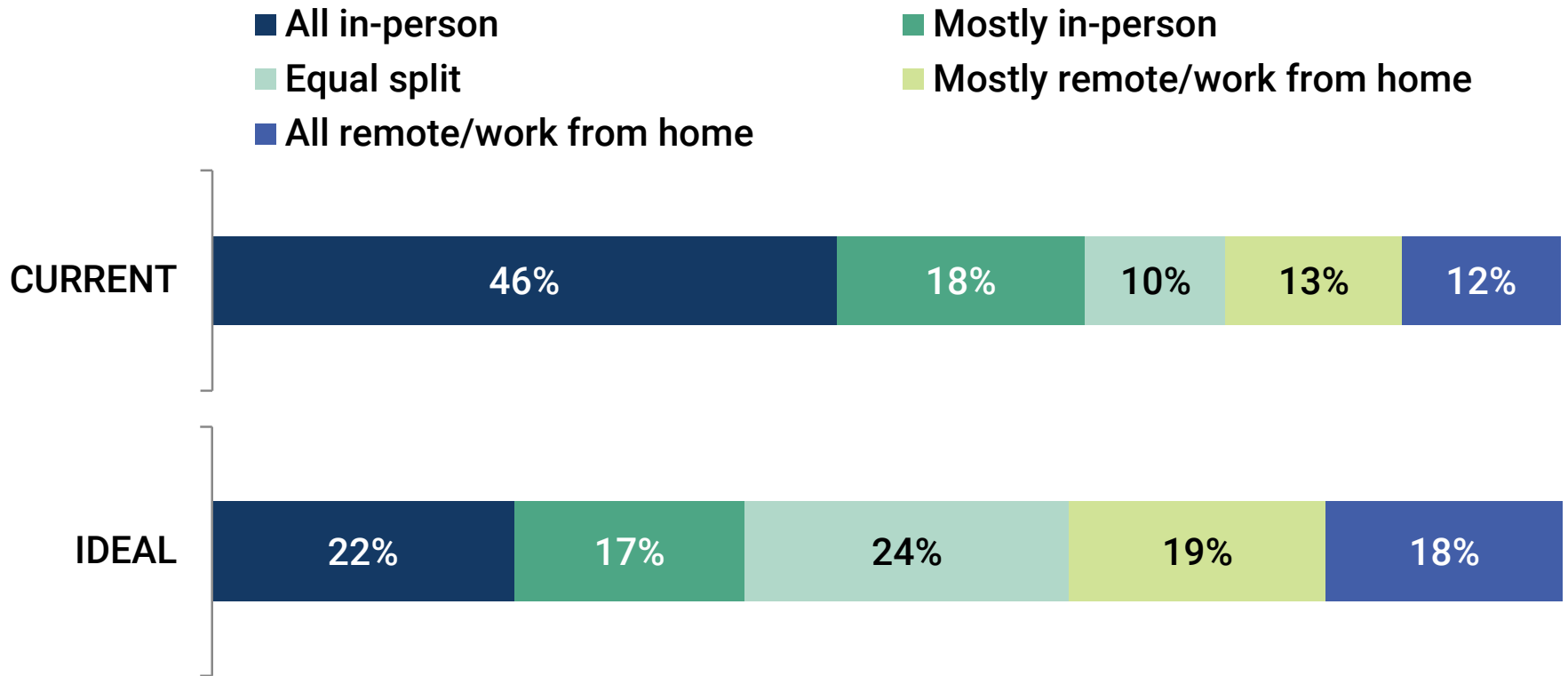
- **Their job and company**
 - Role, industry, type of company
 - Satisfaction with their job
 - Work culture and flexibility
- **Working from home and commuting (current and pre-COVID)**
 - In-person vs. remote work (past, current, and desired)
 - Frequency of in-person work
 - Location of remote work
 - Impact of remote work on lifestyle, job, and travel
- **Now and in the future**
 - More or less remote work
 - Top transportation goals
- **Demographics**

Question Topics: Employers

- **Their company**
 - Industry and type of company
 - Size and location
- **Their workforce**
 - In-person, remote, or hybrid workforce
 - Work culture and flexibility
- **Now and in the future**
 - More or less remote work
 - Benefits of and challenges with remote work on both employer and employee
 - Top transportation goals
- **Company profile**

What Employees Want

Which of the following best describes your current/ideal work environment?



What Employees Want

Which of the following would you most like to see employers offer you more of moving forward?

Flexible work schedule options	39%
Remote work options	36%
Pay transparency (e.g., salary bands, predictable raises and/or promotions, etc.)	30%
Employee recognition initiatives	23%
Rewards for generating new ideas or solutions	22%
Support for external education opportunities (e.g., sponsored courses, tuition assistance, etc.)	19%

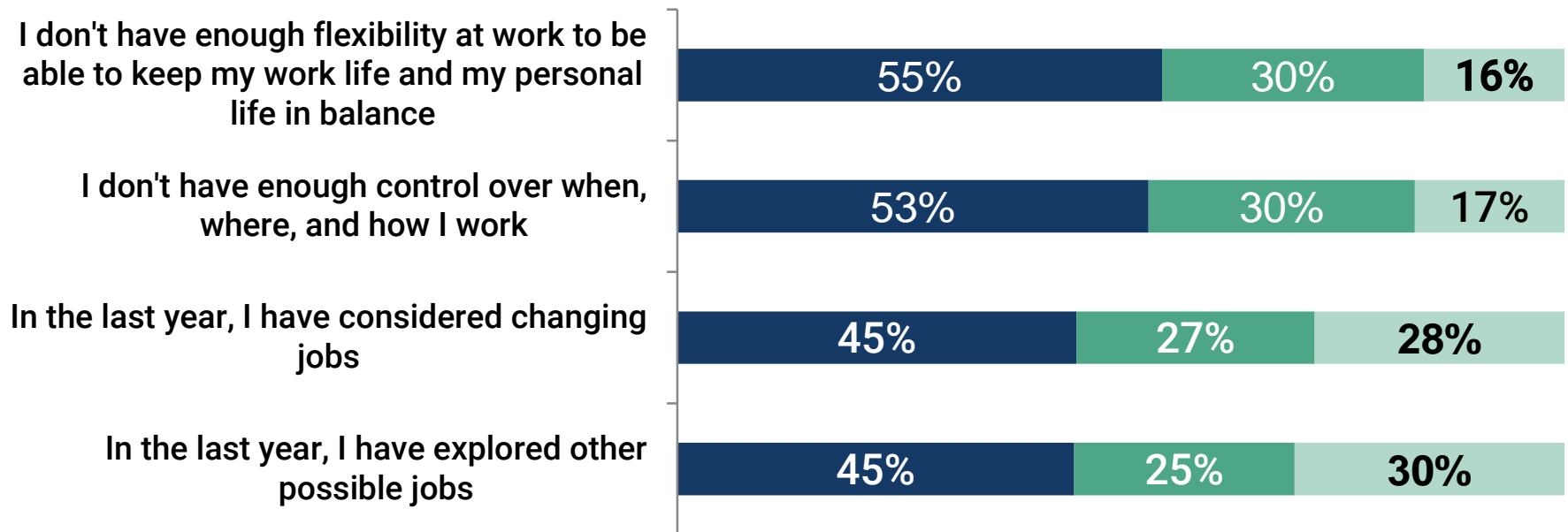
Impact on Overall Job Satisfaction

Resources and accommodations in place to promote accessibility	27%
Work schedule (e.g., number of hours worked, flexible scheduling options offered, etc.)	25%
Amount of control over how, when, and where you do your work	24%
Company's current work-from home/remote work situation	15%
Control over when, where, and how I work	4%
Having enough flexibility at work to be able to keep work life and personal life in balance	4%

Limitations of Current Work Environment

How much do you agree or disagree with each of the following statements?

■ Disagree ■ Neutral ■ Agree



Back to the office?

Employees

In the next 6 months to a year, how do you see your company changing work from home plans?

- Employees will be allowed to work from home more frequently/with more flexibility
- Work from home plans will stay the same
- Employees will be required to work in the office more frequently/on a schedule
- Not sure



Employers

In the next 6 months to a year, how do you see your company changing work from home plans?

Employees will be allowed to work from home more frequently/with more flexibility	3%
Work from home plans will stay the same	89%
Employees will be required to work in person more frequently/on a schedule	8%

What's driving WFH?

❑ Congestion

43% of employers think this is the #1 reason employees want to WFH

81% of employees say this is a main reason

❑ Save Money

8% of employers think this is the #1 reason employees want to WFH

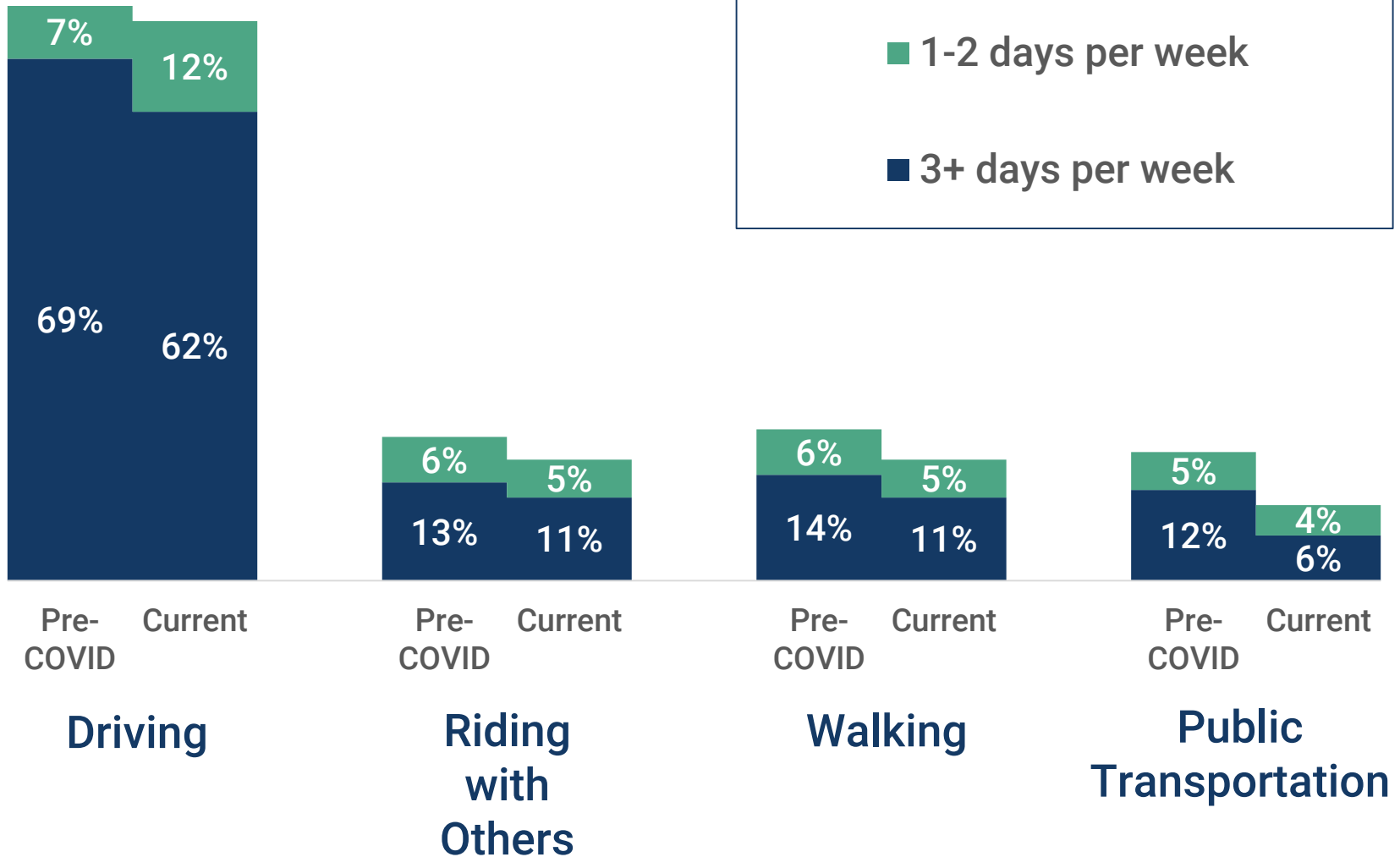
79% of employees say this is a reason

❑ Time with Friends & Family

14% of employers think this is the #1 reason employees want to WFH

52% of employees say this is a reason

Commute Mode: Past and Present



Segmentation

- Respondents have differences in socioeconomic status, travel behaviors, working arrangements, attitudes towards working from home, etc.
- BMC wants to understand what the employment market looks like:
 - a) where they live
 - b) what portion of the total market they represent
 - c) how they behave and think
 - d) how they perceive and use different modes.
- Cluster Analysis is used to identify patterns by grouping data points into different groups called clusters.
- Grouping is done based on their similarities and differences.

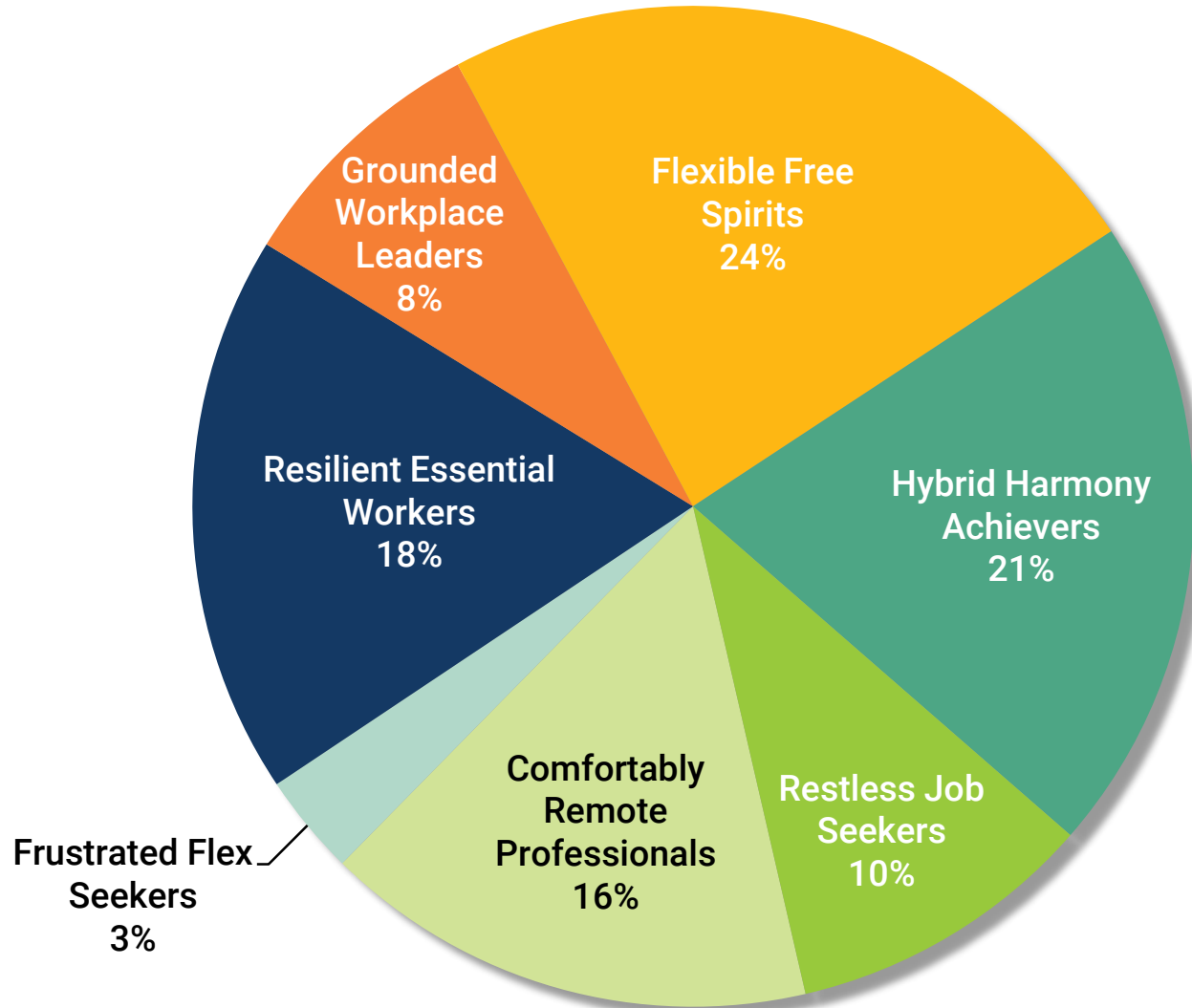


Segmentation

21 Variables Used in Factor Analysis for clustering

Factor 1	Factor 2	Factor 3	Factor 4	Factor 5	Factor 6
Flexibility at work	Work from home	Ideal work environment	Full-time employment	Low level of education	Low income household
Control on work situation	Flexible hybrid schedule	Travel to physical location	Duration of work hour	Work type	Single family house
WFH situation		Remote work option		Office and technology	Auto travel
Flexible work schedule					Young adult
Resources and accommodations					Race/Ethnicity
Work schedule					

Segmentation



Segmentation (continued)

Comfortably Remote Professionals 16%

- Full time mid-level and front-line white-collar office workers in white collar jobs working five days a week.
- More than half work from home, and most could.
- Want remote work, flexible schedules, and pay transparency.
- Do not drive much and use public transit less (they are not commuting).

Frustrated Flex Seekers 3%

- Full time white-collar mid- and upper level managers working five days a week either in-person or hybrid.
- Either working in-person more now or expect to be in the future.
- Feel they lack control over their jobs and are considering leaving.
- Looking for remote work, flexible schedules, and pay transparency.

Segmentation (continued)

Resilient Essential Workers 18%

- Mix of part- and full-time workers working in customer service and manual labor.
- Would like more hybrid work opportunities but do not see that happening where they currently are.
- Those who do WFH feel distracted, have trouble with WFH software, and feel out of the loop.
- Use a mix of transportation modes.

Grounded Workplace Leaders 8%

- Work in-person full-time as middle or upper management or in customer service.
- Happy with their jobs which offer opportunities for decision making, internal/external education, and employee recognition.
- Has changed the least since COVID.
- Segment that drives the most.

Segmentation (continued)

Flexible Free Spirits 24%

- Work part-time, often in-person for small companies, with many being self-employed.
- Satisfied with their jobs.
- Jobs offer few perks but do offer flexibility that they use to do many things with their free time.

Hybrid Harmony Achievers 21%

- Work full time in health care and other white collar professions, often working hybrid schedules with great flexibility, which fits their lifestyles.
- Satisfied and stable in their jobs, and not expected a change in their company's WFH plans.
- Do not drive a lot because they do not commute a lot.

Segmentation (continued)

Restless Job Seekers 10%

- Work in-person full-time in customer service, manual labor, healthcare, industrial work, and education.
- They are looking for other employment, either in-person or hybrid, with flexible schedules and pay transparency.
- When they do work remotely, they often take advantage of that to do a number of things, particularly spending time with family & friends.

Preliminary County-Level Results

Overall Sample:

- 80% of employees work only one job, with most working 31-50 hours weekly.
- 50% or more are satisfied with their work schedule, job, and workplace accommodations.
- 1 in 5 or fewer feel they lack flexibility or control over their work-life balance.
- 60% worked fully in-person before COVID-19, but now 10% work fully remote (except Queen Anne's County).
- 20% of remote workers take advantage of caring for family members while working from home.

Preliminary County-Level Results

Anne Arundel County

- 40% work 31-40 hours, with 50% in office roles.
- High job satisfaction and low likelihood of changing jobs.
- Companies are either very small (<20 employees) or very large (5,000+).

Baltimore City

- Employees are most likely to prefer to work entirely in person, ideally

Baltimore County

- Employees were generally similar to their counterparts from other counties, not standing out on matters of satisfaction or preference.

Preliminary County-Level Results

Carroll County:

- Least likely to have company monitoring while working from home.
- Most likely to avoid traffic congestion when working remotely.

Harford County:

- Least satisfied with control over work location, timing, and methods & Least likely to consider changing jobs or do household chores while working from home.

Howard County:

- Howard County employees were significantly more likely to be hybrid or not working from home

Queen Anne's County:

- Small sample size – results should be interpreted cautiously.
- Highest proportion of employees reporting a disability.

Preliminary County-Level Results

Key Takeaways:

- Most employees are satisfied with their jobs and work schedules, but preferences for in-person vs. remote work vary by county.
- Carroll and Anne Arundel Counties stand out for remote work benefits (avoiding congestion, high satisfaction).
- Harford County employees feel less control over their work, while Baltimore City employees prefer in-person work.
- Queen Anne's County has unique characteristics but should be interpreted cautiously due to a small sample size.

For More Information

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