Post-Pandemic Trends

Phase 1 Survey Results

February 4, 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

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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

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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

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What do employees want out of their working environment and what is it leading them to do?

Which of the following best describes your current/ideal work environment?
(n=1,628-1,630)

Legend: ■ All in-person ■ Mostly in-person ■ Equal split ■ Mostly remote/work from home ■ All remote/work from home

CURRENT
All in-person	Mostly in-person	Equal split	Mostly remote/work from home	All remote/work from home
46%	18%	10%	13%	12%

IDEAL
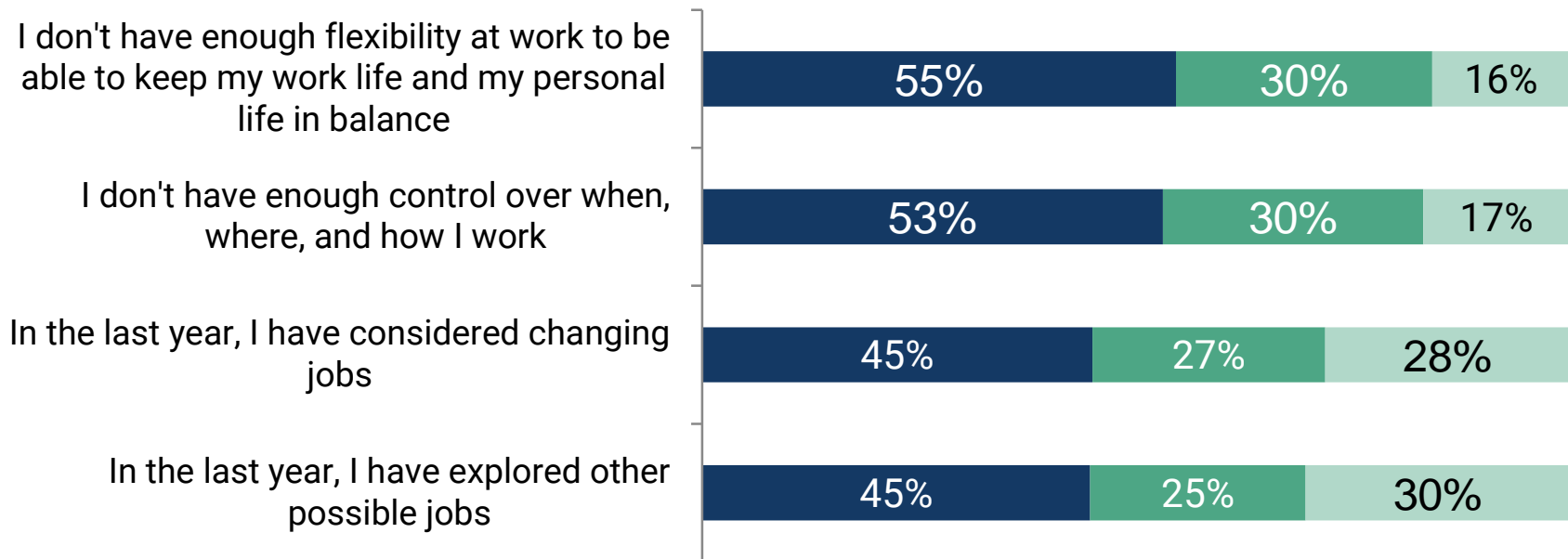| All in-person	Mostly in-person	Equal split	Mostly remote/work from home	All remote/work from home
22%	17%	24%	19%	18%

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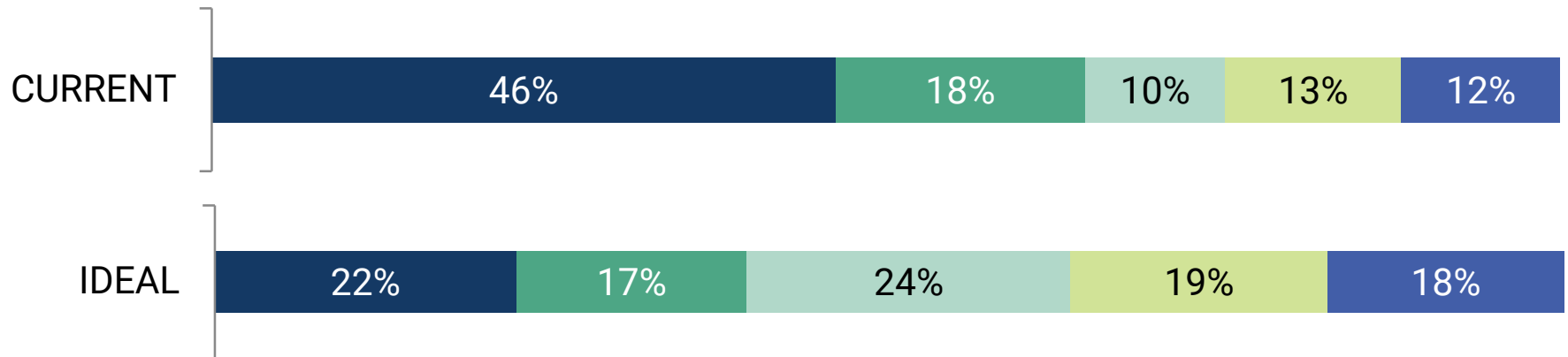
What Employees Want

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%

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Limitations of Current Work Environment

How much do you agree or disagree with each of the following statements?
(n=1,629-1,630)

■ Disagree ■ Neutral ■ Agree

Statement	Disagree	Neutral	Agree
I don't have enough flexibility at work to be able to keep my work life and my personal life in balance	55%	30%	16%
I don't have enough control over when, where, and how I work	53%	30%	17%
In the last year, I have considered changing jobs	45%	27%	28%
In the last year, I have explored other possible jobs	45%	25%	30%

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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

11%	45%	21%	23%

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%

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Why do people work from home (WFH)

Congestion

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

81% of employees say this is a reason

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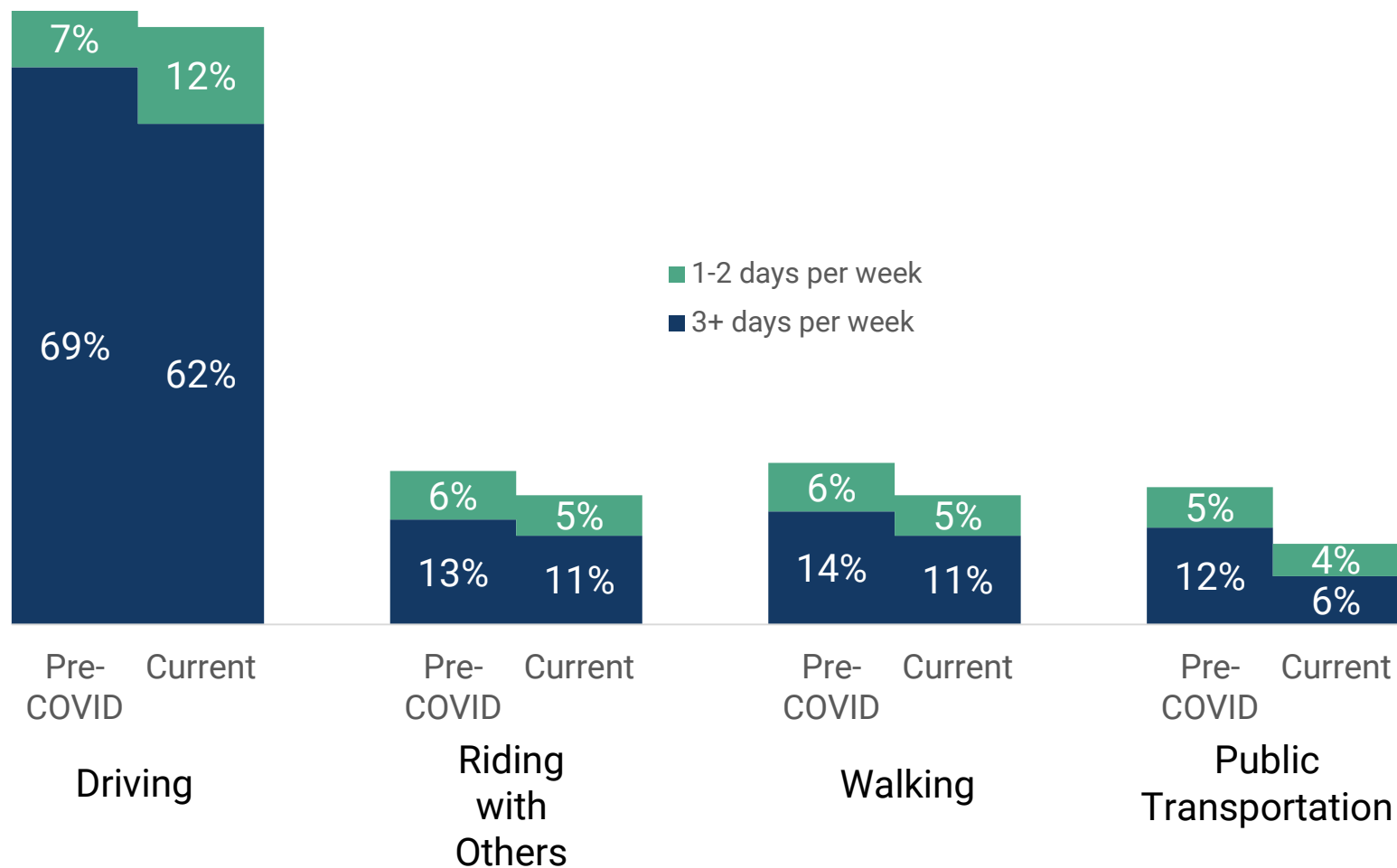
8% of employers think this is the #1 reason employees want to WFH

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

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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.
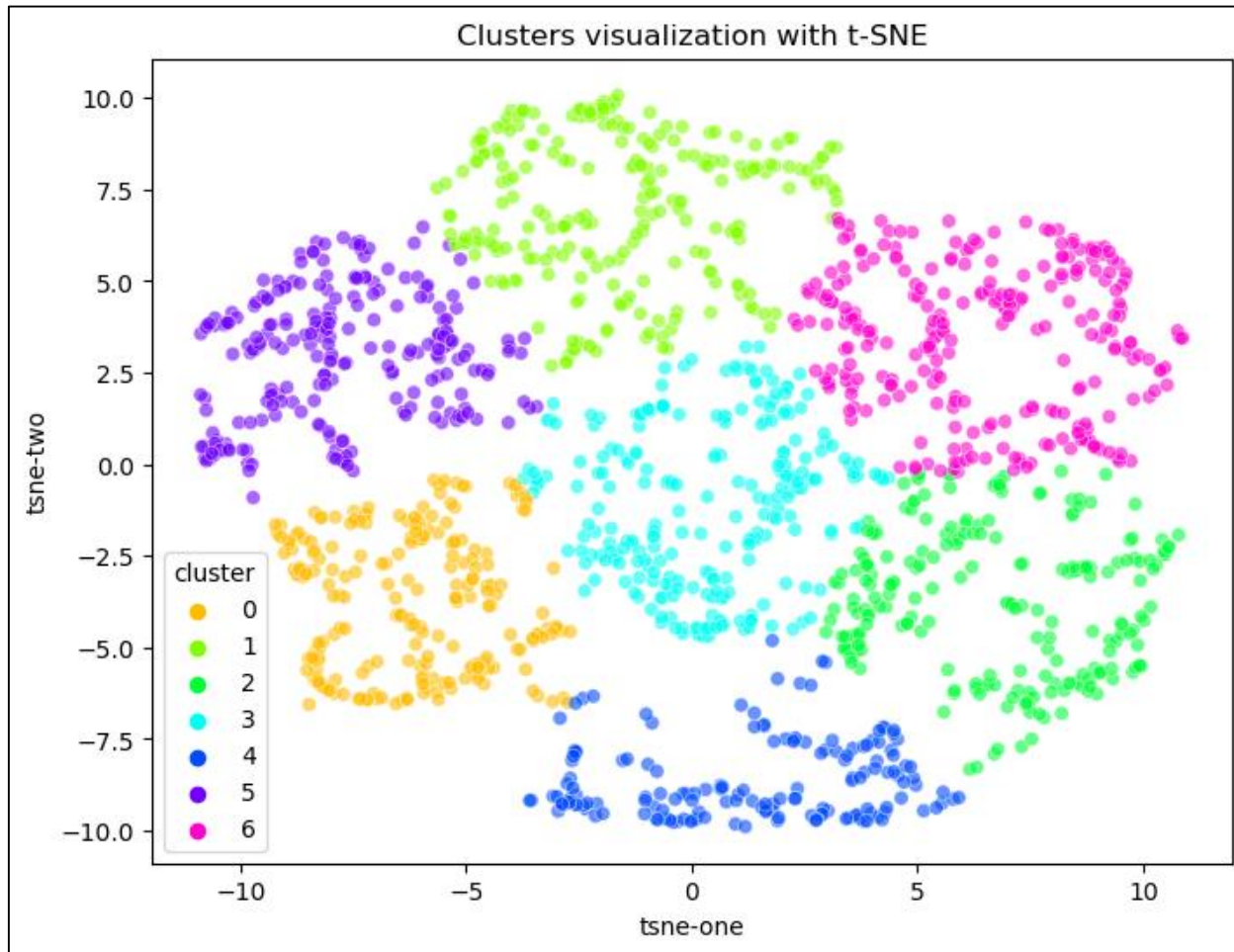
Segmentation

21 Variables Used in Factor Analysis for clustering

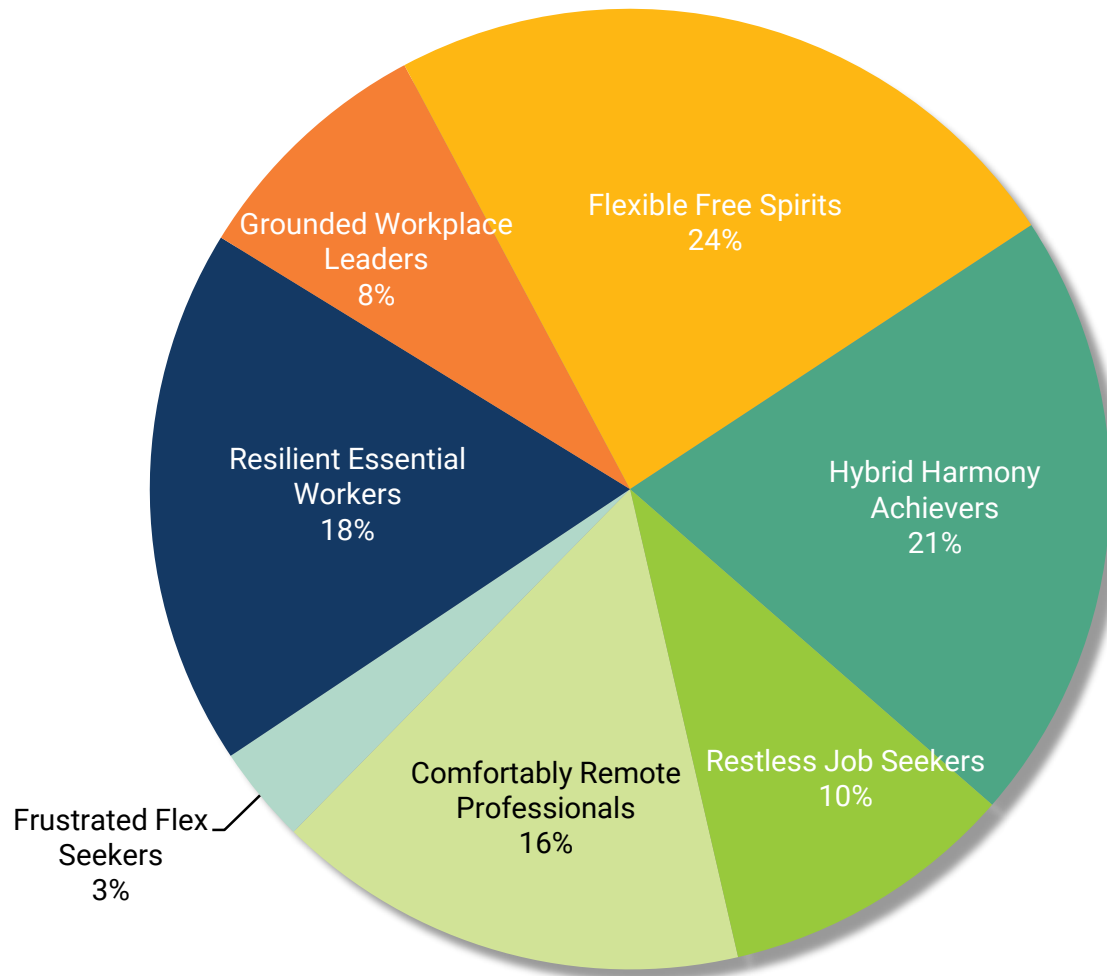| Factor1	Factor2	Factor3	Factor4	Factor5	Factor6
Flexibility at work	Work from home	Ideal work environment	Full-time employment	Low level of education	Low income household
Control on work situation	Flexible hybrid schedule	Travel to physical location	Duration of work hour	Work type	Single family house
WFH situation		Remote work option		Office and technology	Auto travel
Flexible work schedule					Young adult
Resources and accommodations					Race/Ethnicity
Work schedule					

Segmentation

Clusters visualization with t-SNE

Segmentation

Segments

- Flexible Free Spirits 24%
- Hybrid Harmony Achievers 21%
- Restless Job Seekers 10%
- Comfortably Remote Professionals 16%
- Frustrated Flex Seekers 3%
- Resilient Essential Workers 18%
- Grounded Workplace Leaders 8%

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 ay 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.

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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.

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Segmentation (continued)
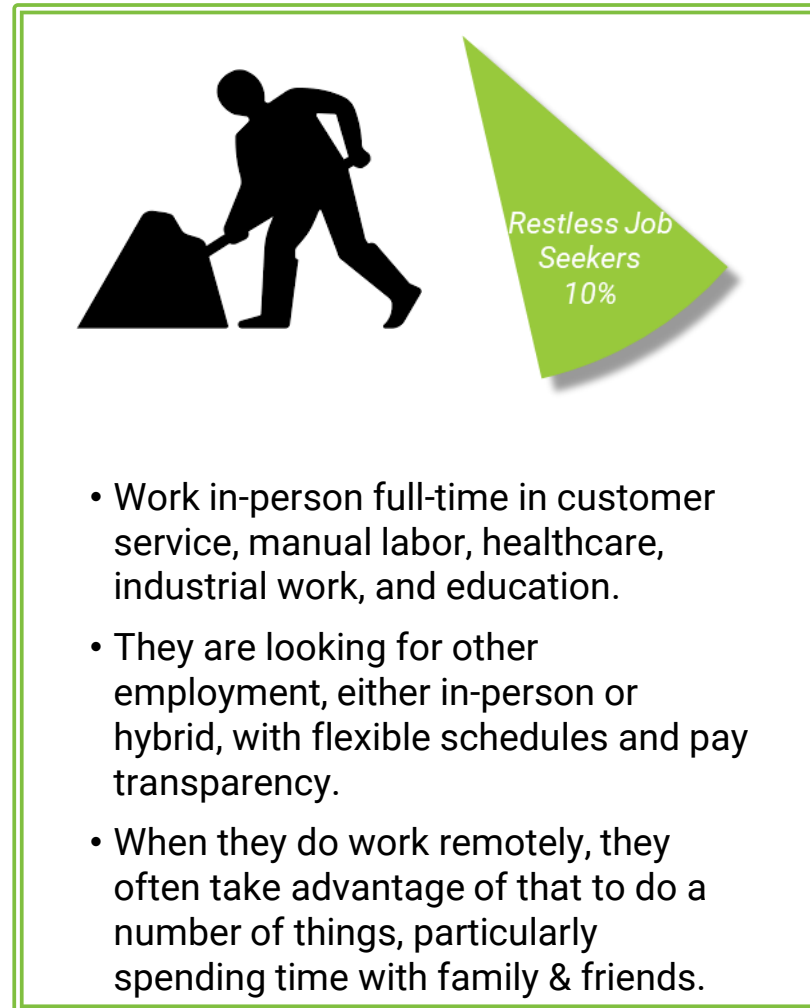
Flexible Free Spirits 24%

- 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)

- 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.

For More Information

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