

2023 Employer Survey

Findings & Key
Takeaways



Methodology

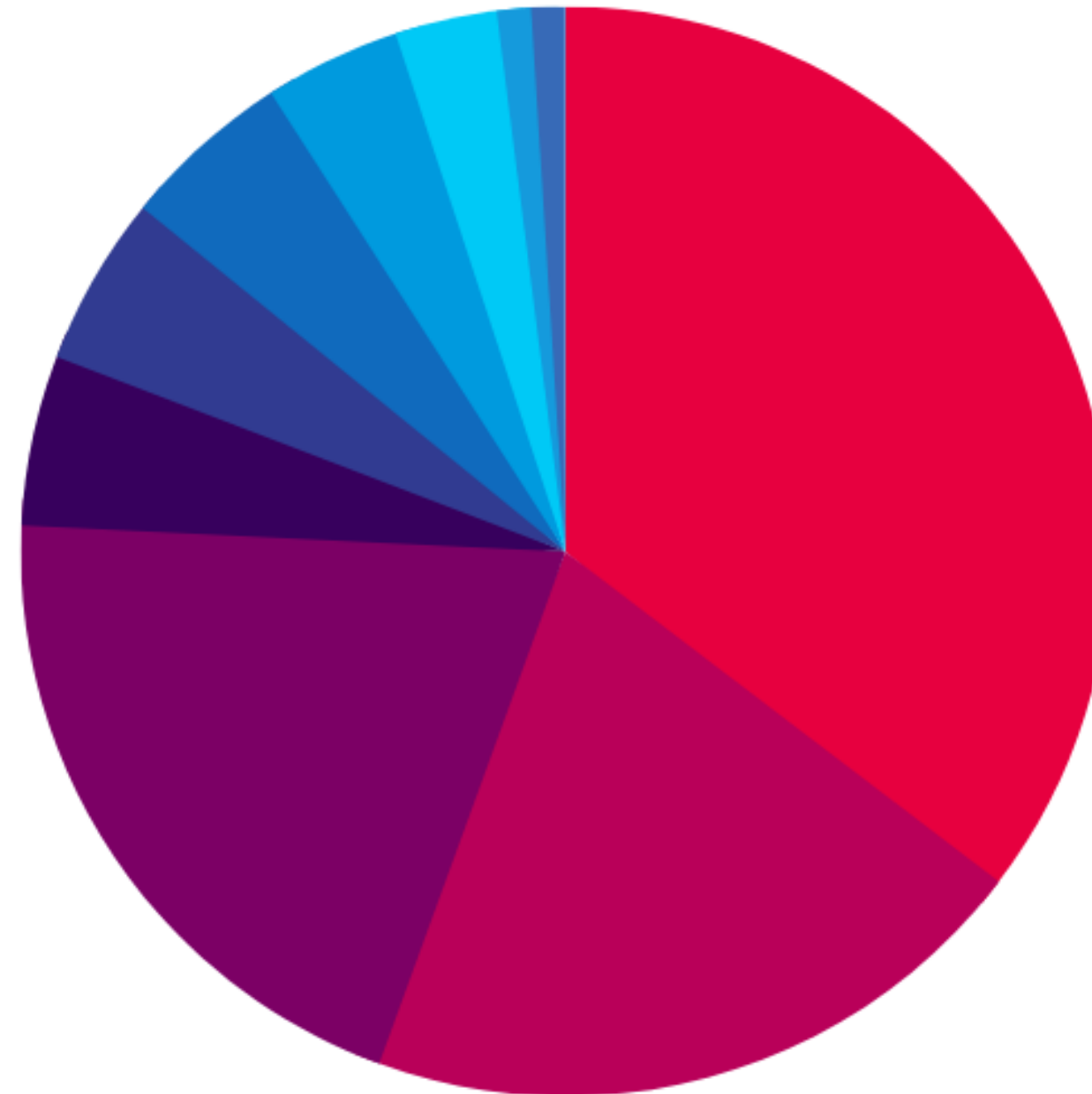


Valley Vision, in collaboration with SACOG and local transportation agencies, conducted a series of surveys to understand the transportation and related needs of employers in the Capital Region. The first survey, launched in August 2022, assessed location-based work changes, hiring challenges, onboarding issues, and training opportunities.

Data for this survey was collected through a 26-question online survey from May to July 2023, distributed via email to industry partners, regional employers, chambers of commerce, and workforce boards in seven counties. The survey focused on workplace structure trends and transportation needs.

Industries Represented

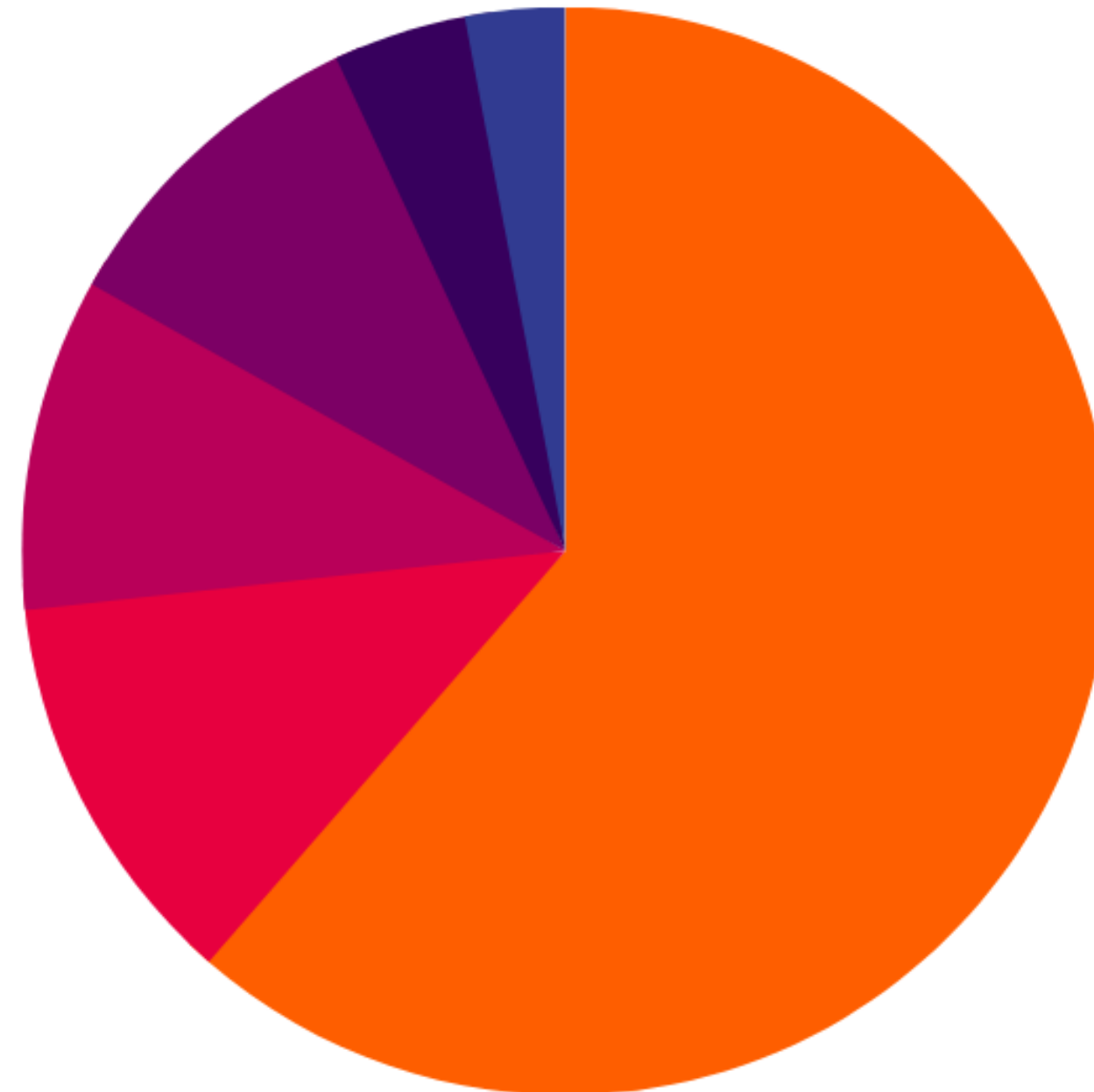
Industry representation from respondents included the occupation groups shown in the graph below. The majority of respondents were from the Nonprofit, Government, and Other sectors.



Nonprofit - **35%**
Government - **20%**
Other - **20%**
Construction - **5%**
Finance - **5%**
Manufacturing - **5%**
Health Care - **4%**
Accommodations - **3%**
Restaurants/Food Service - **1%**
Transportation - **1%**

Geographic Reach

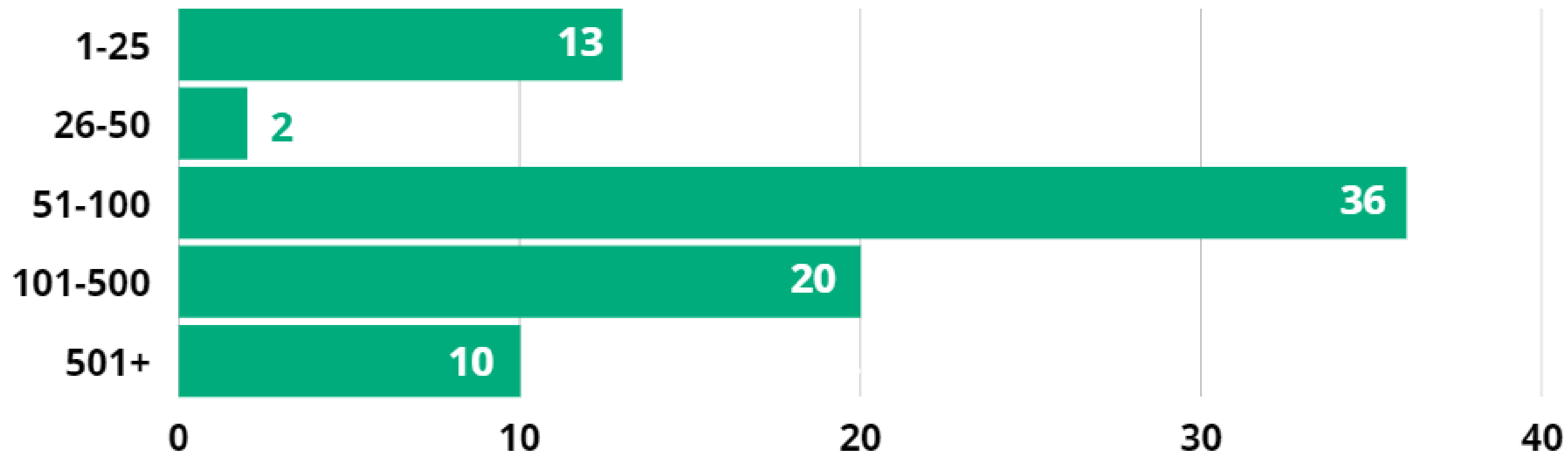
The survey's primary distribution was centered in the Capital Region, which consists of the following counties: Sacramento, El Dorado, Placer, Sutter, Yolo, and Yuba. Additional survey responses came from Solano and Nevada counties.



Sacramento - 62%
Other - 12%
Placer - 10%
Yolo - 10%
El Dorado - 4%
Yuba - 3%

Business/Organization Size

Most respondents came from small to medium sized businesses or organizations, as shown by the chart below. However, the data also includes larger entities, which ensures that the survey is not skewed too heavily towards a specific demographic.

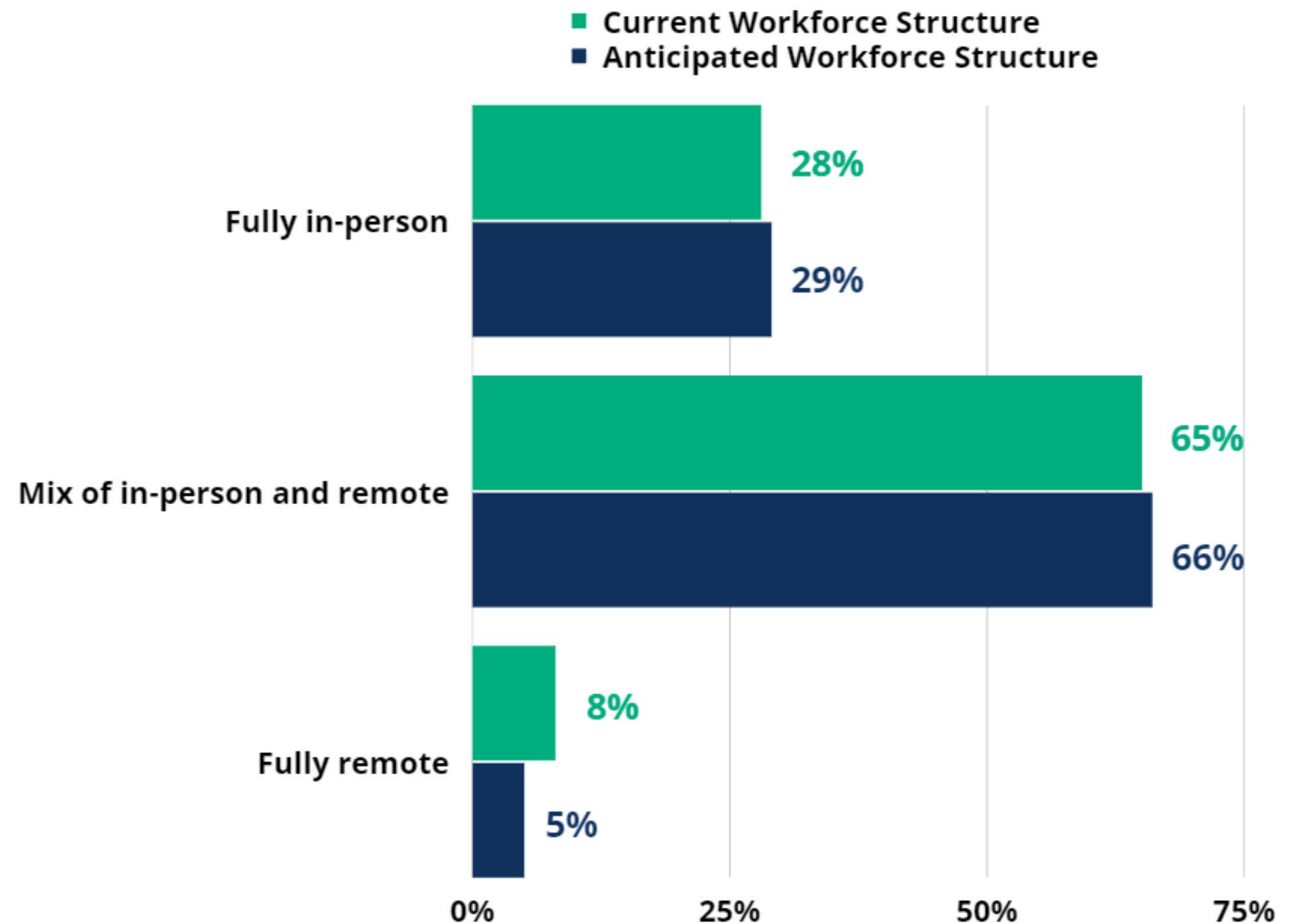


46% of respondents indicated that the size of their workforce did not change significantly as a result of the covid-19 pandemic.

Workplace Structures

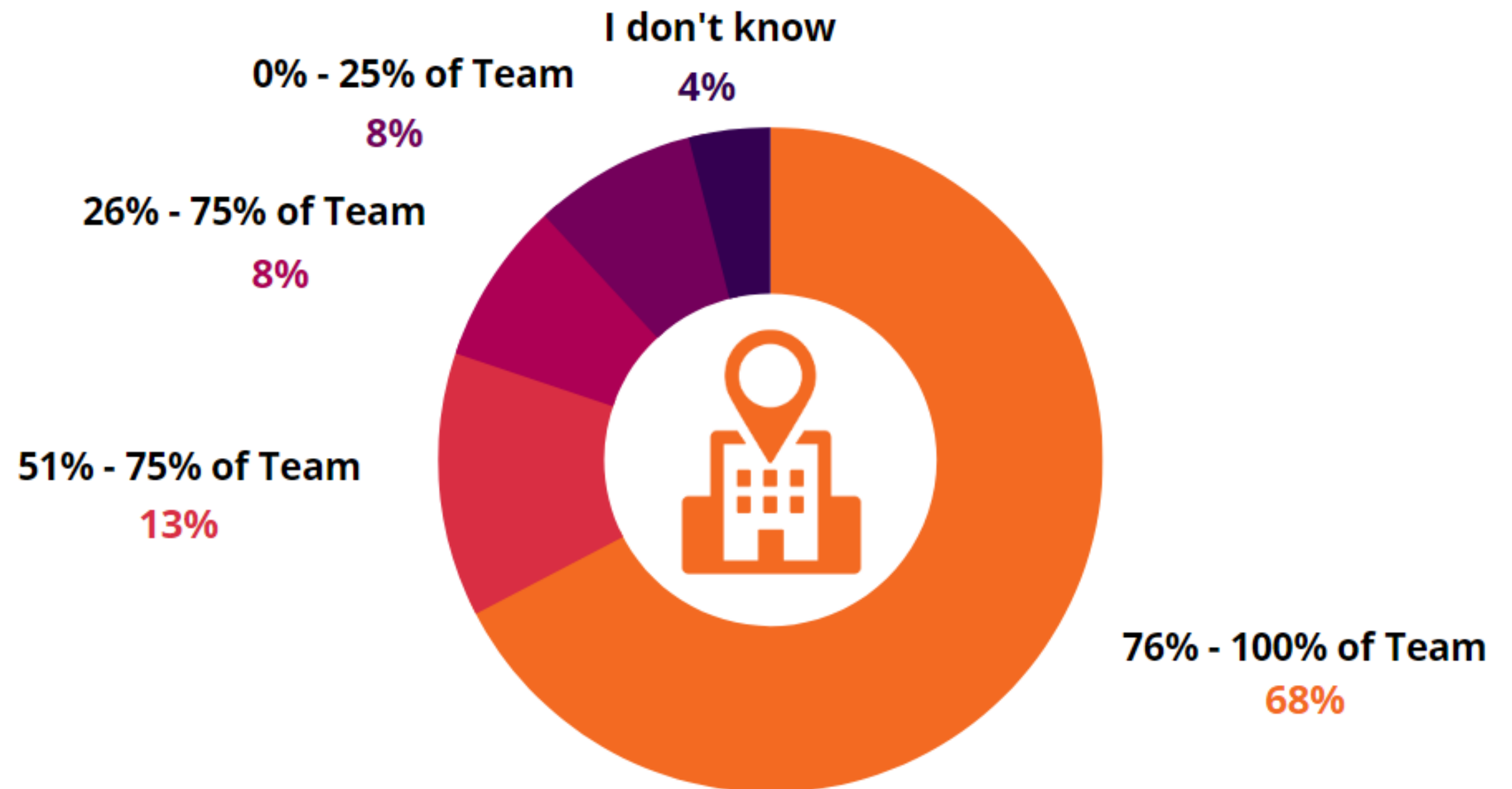
This bar chart measures the current workplace team structures and the anticipated structure 12 to 24 months from the survey's distribution. This indicates that hybrid work is the most popular option, and employers plan to stay with this structure for at least the next 12-24 months.

In comparison to the 2022 Employer Survey Report, relatively the same percentage of respondents indicated that they expect to maintain a hybrid model (68% versus 66% in 2023). The percentage that anticipate having a fully-remote work structure decreased slightly from 8% in 2022 to 5% in 2023.



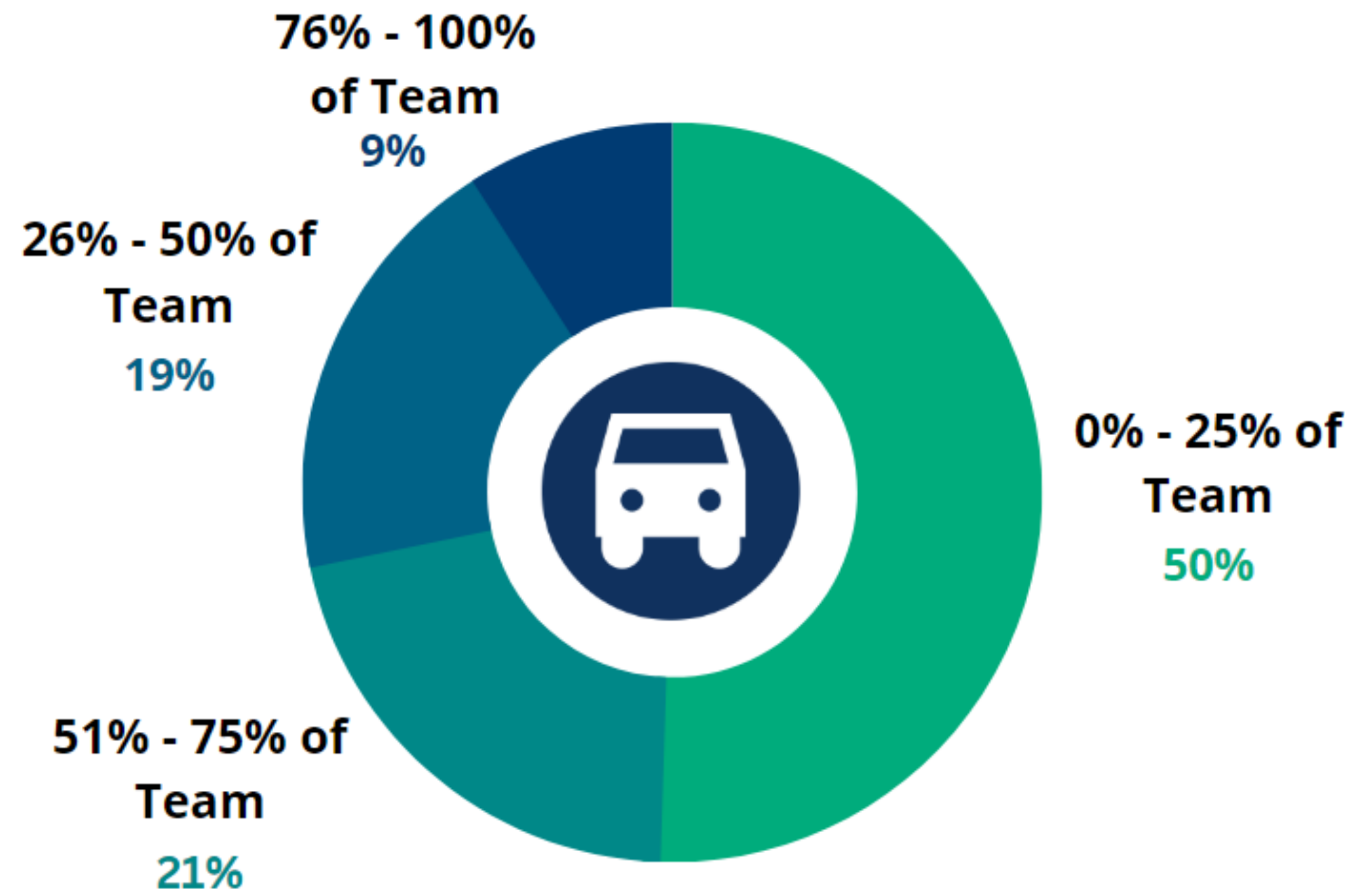
Commute Statistics

68% of respondents indicated that most of their team came into the office at least once a week. This is an increase from 2022, in which 50% of respondents said the same thing.



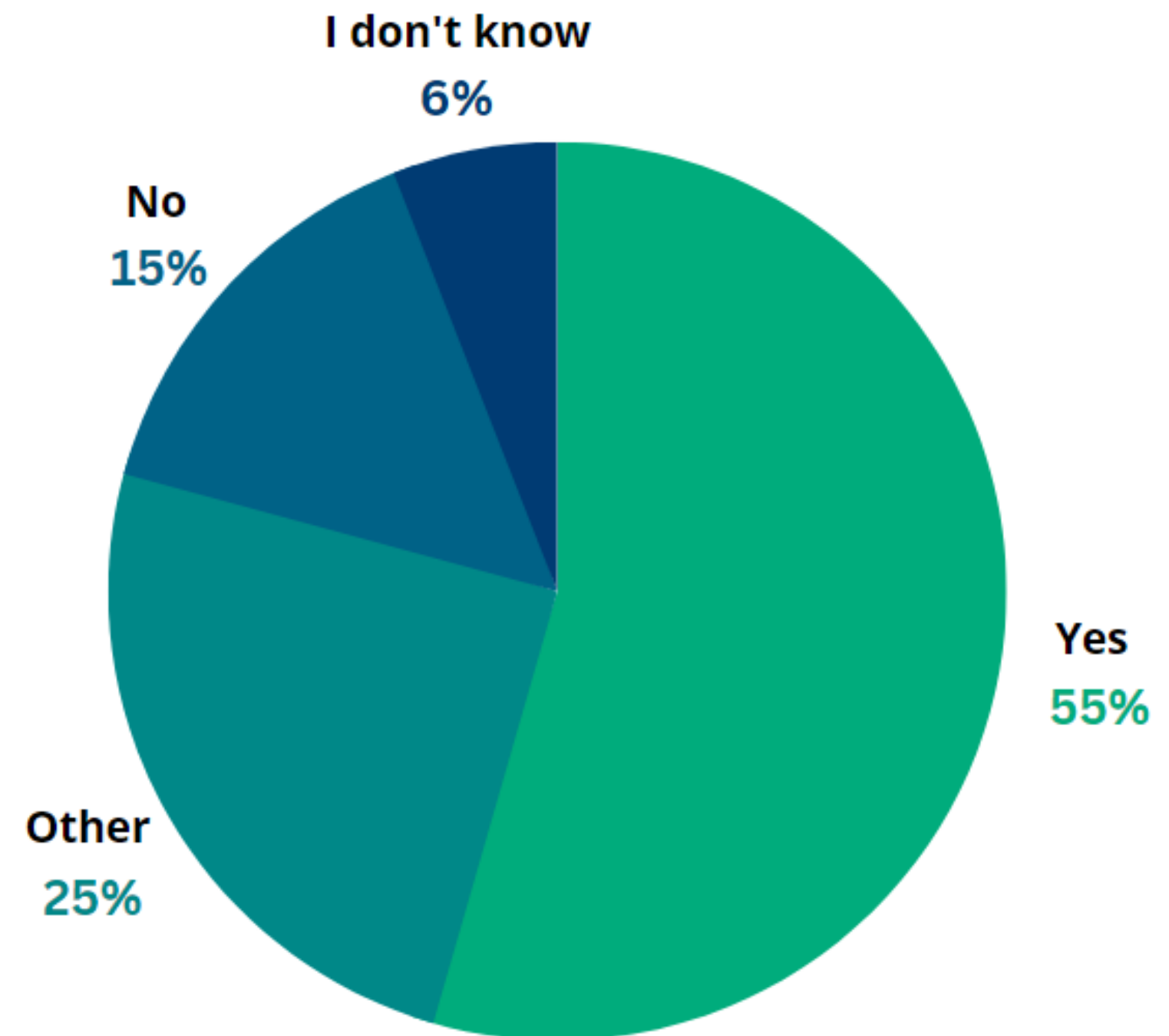
Commute Statistics

This graph depicts an estimate of the percentage of positions in respondents' organizations that require employees to utilize a vehicle during work hours. Last year, 50% to 75% of employers surveyed had this requirement at their business or organization. In this most recent survey, half (50%) of all respondents indicated only 0 % to 25% of their team were required to utilize a vehicle.



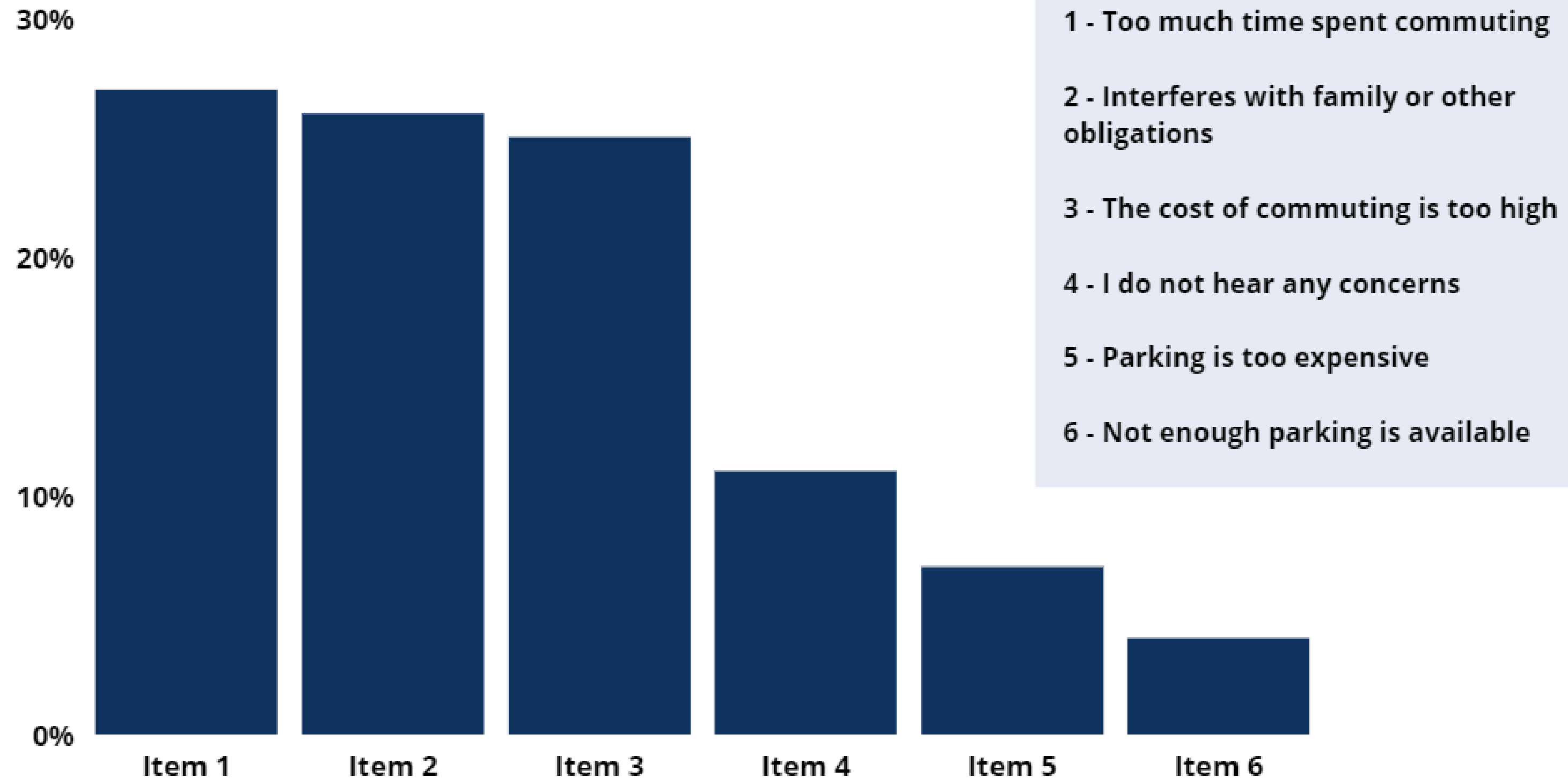
On-site Schedules

55% of organizations allow their hybrid employees to choose their on-site schedule.



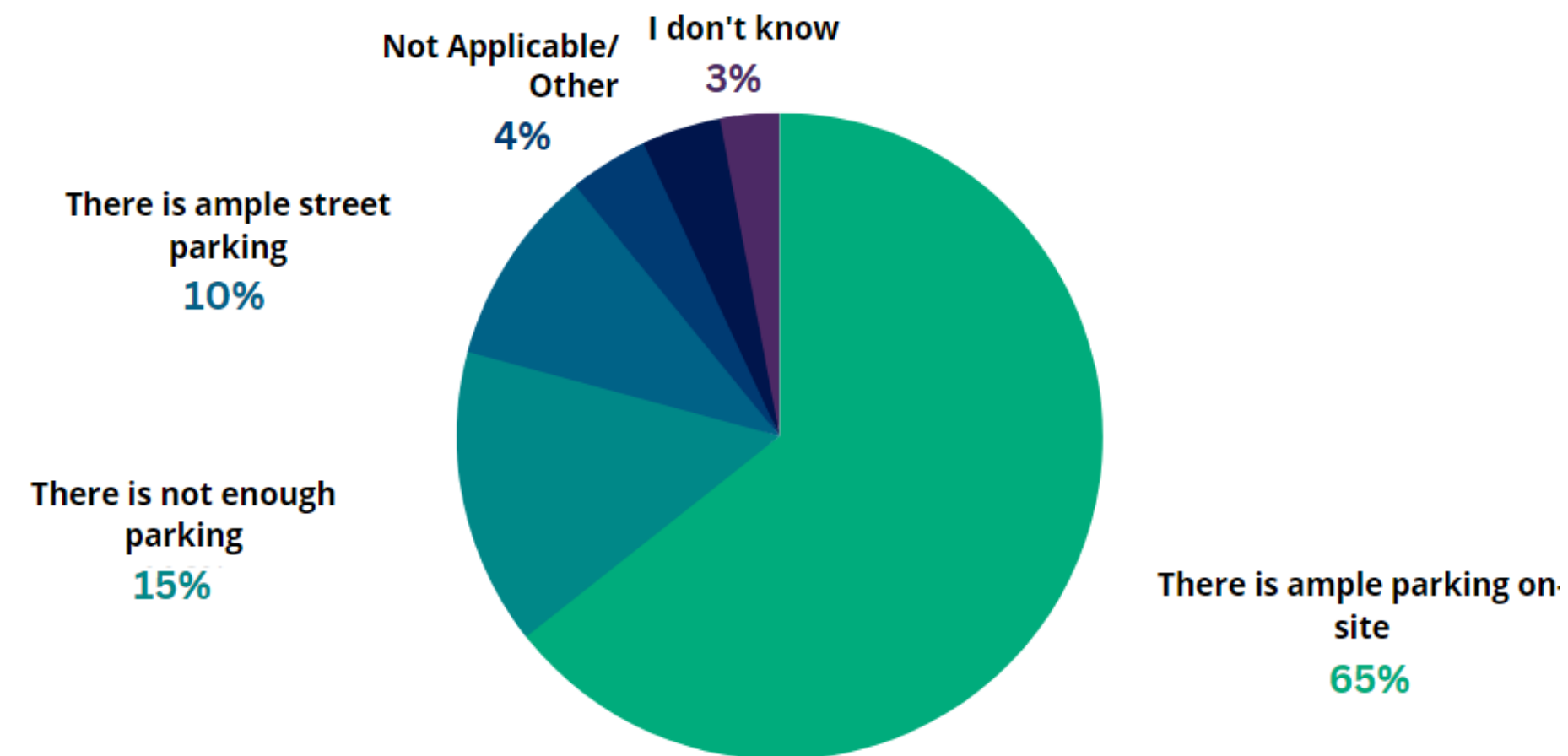
Most Common Commute Concerns

60% of respondents indicated that the concerns listed here were considered when determining their current fully remote or hybrid work structure.

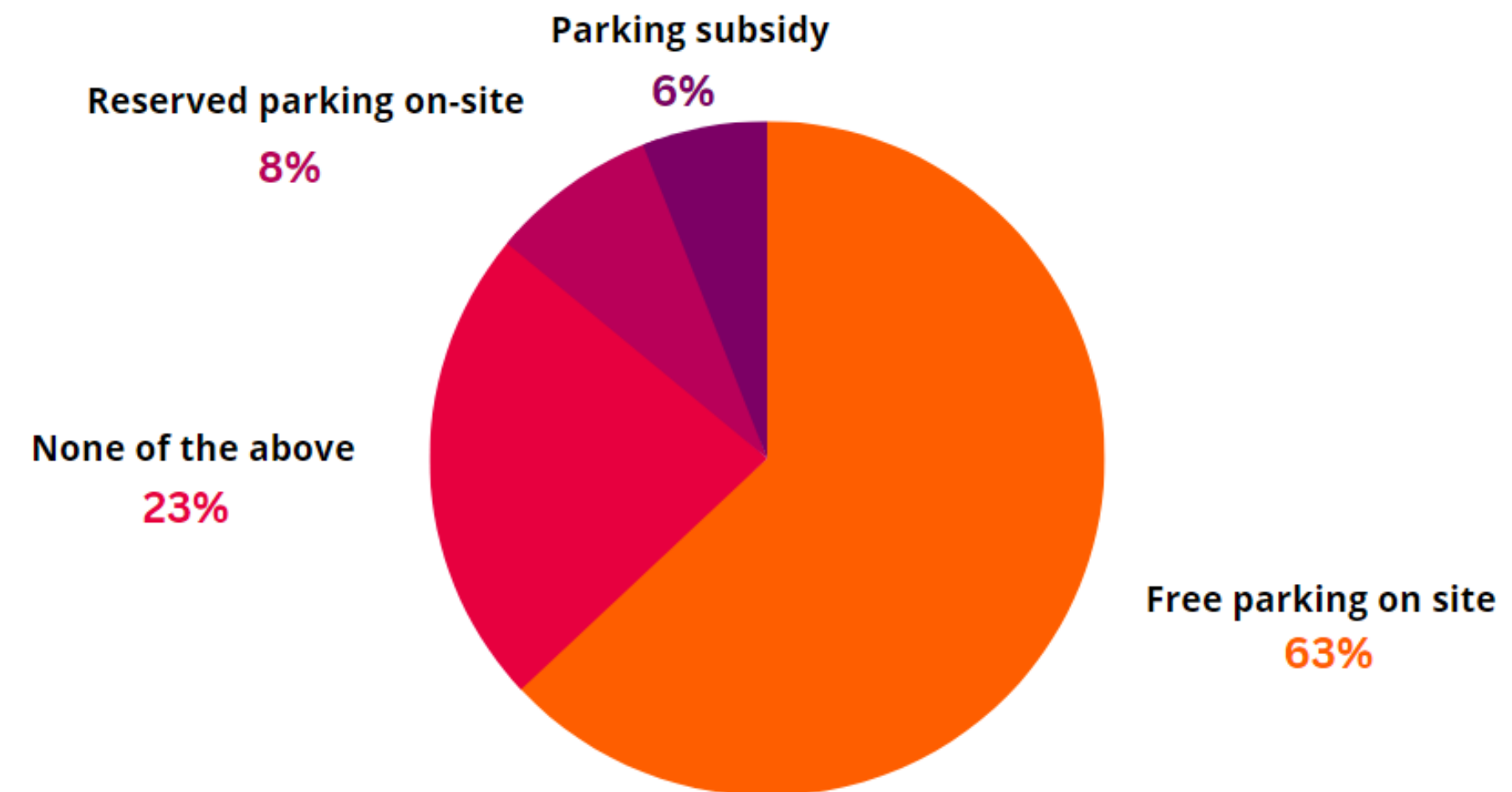


Parking Availability

How would you describe the availability of employee parking at your business/organization's location?

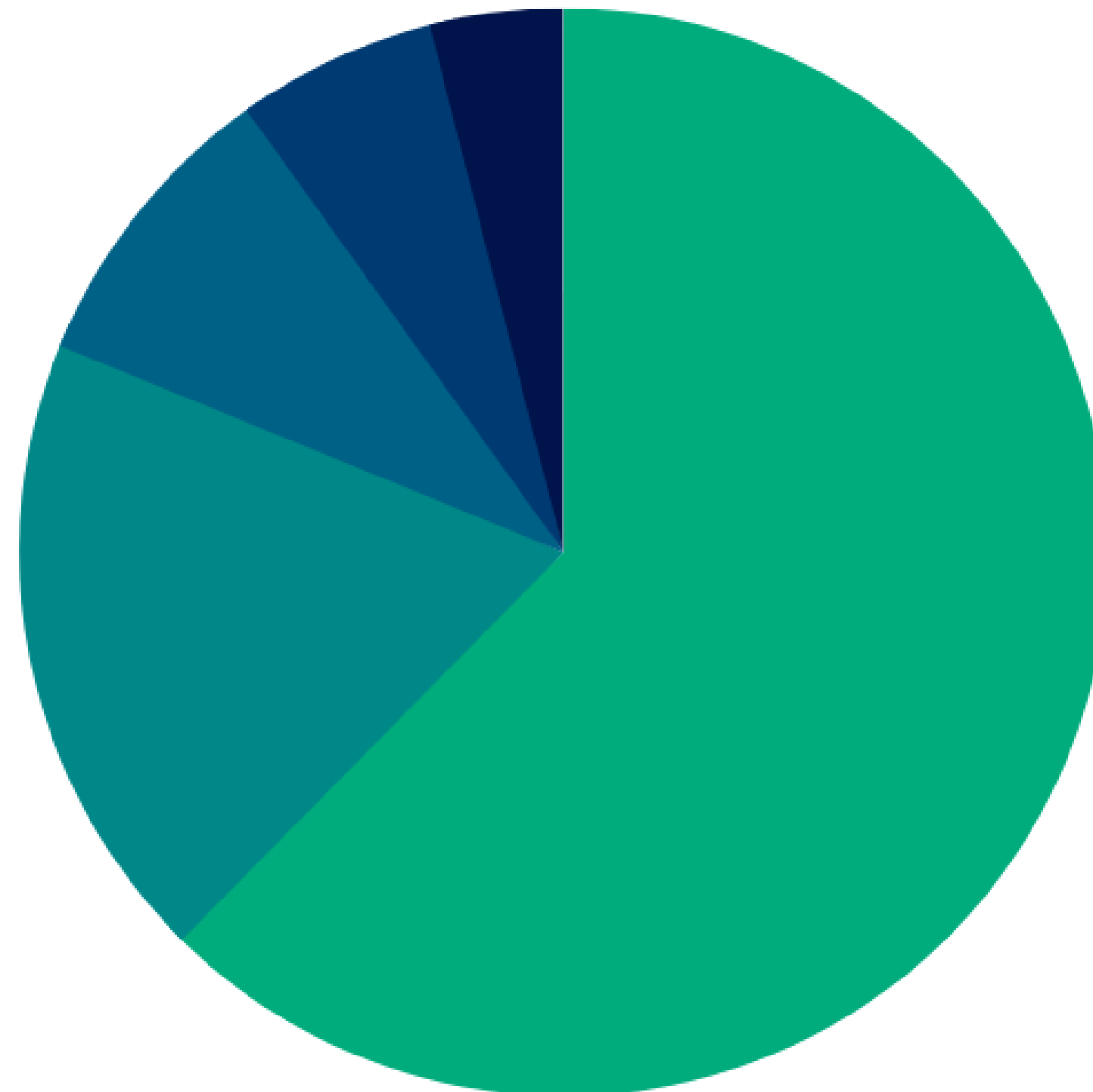


Currently, is your business/organization offering any of the following vehicle-related incentives to employees?



Transportation-related Incentives

The majority of respondents(63%) indicated that they are not currently offering any transportation-related incentives. This is a steep increase from 2022's 38%.



None of the above - 63%

Free bus or light rail passes, or a subsidy to purchase bus or light rail passes - 19%

Gas subsidy - 9%

Vanpooling - 6%

Lyft, Uber, or other rideshare subsidy - 4%

Are any of your business/organization's employees currently using co-working spaces (e.g., WeWork, the Urban Hive, or others)?

When asked whether their business or organization supports employees' use of co-working spaces or not, respondents indicated...

Yes - 6%

No - 79%

Other - 3%

I don't know - 12%

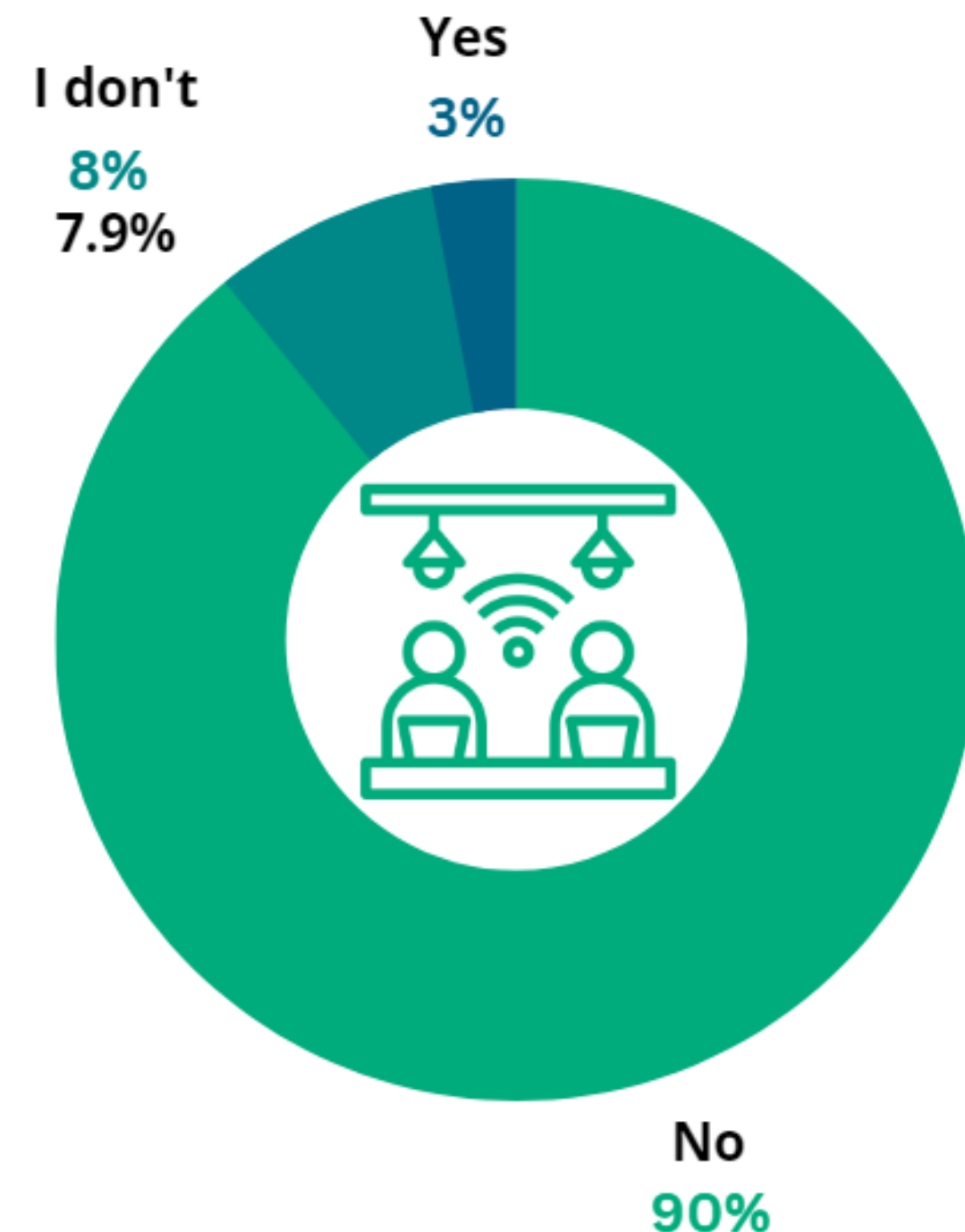
And for the respondents who indicated "No" to this question, they were asked if their business or organization would consider supporting the use of co-working spaces (via subsidies or renting out spaces) if interest was expressed...

Yes - 18%

No - 46%

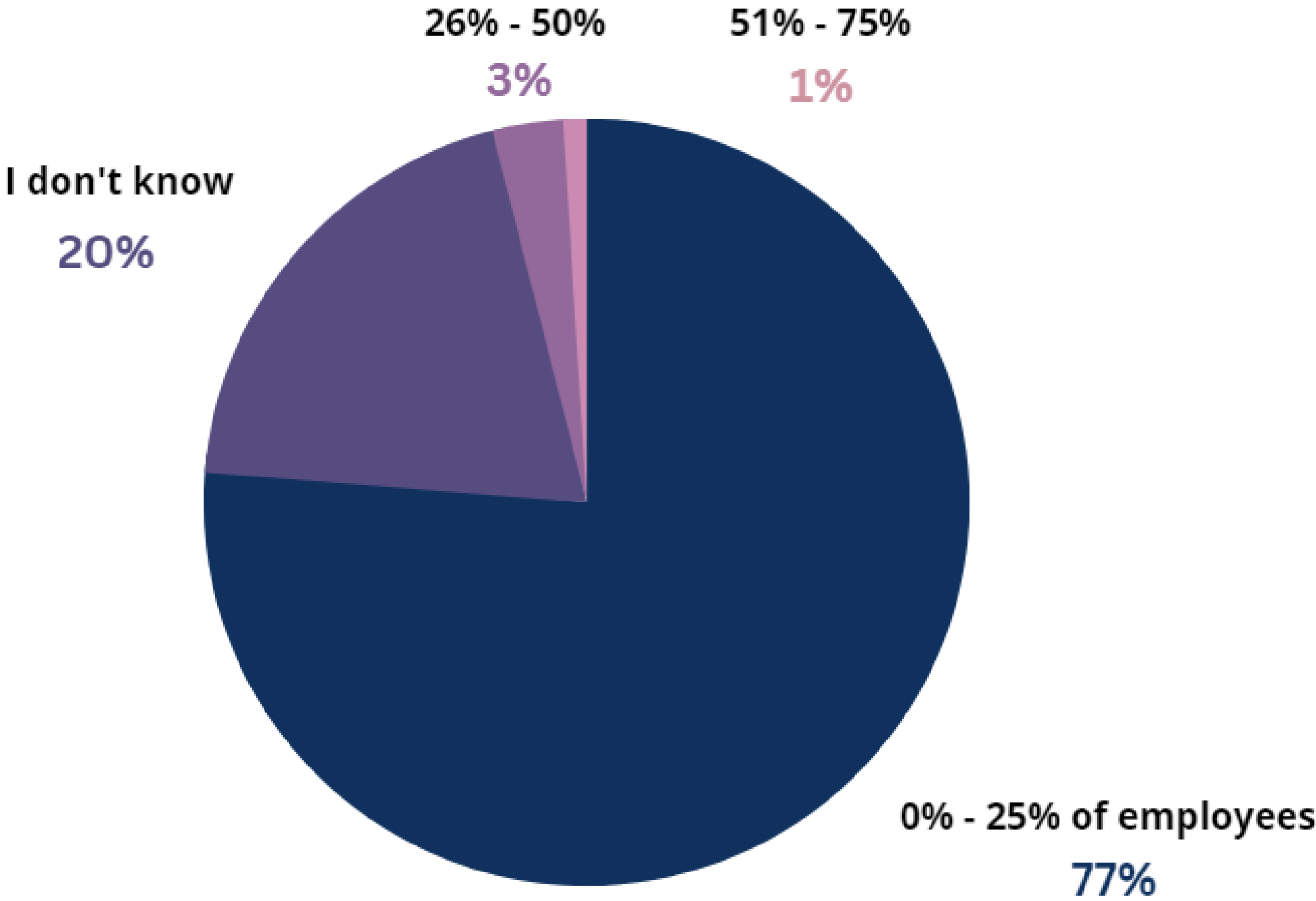
Other - 7%

I don't know - 31%



Employees Relying on Public Transit

Over 75% of respondents said that only a minority (0 - 25%) of their employees are currently relying on public transit for their commutes.



Which of the following best describes your organization's approach to public transit for your employees as they return to the workplace?

8%

We are not actively encouraging our employees to take public transit to work, but are still providing employee transit benefits

13%

I don't know

16%

We are actively encouraging our employees to take public transit to work, including providing employee transit benefits

We are fine if employees take public transit to work, but don't have any specific programs to support it

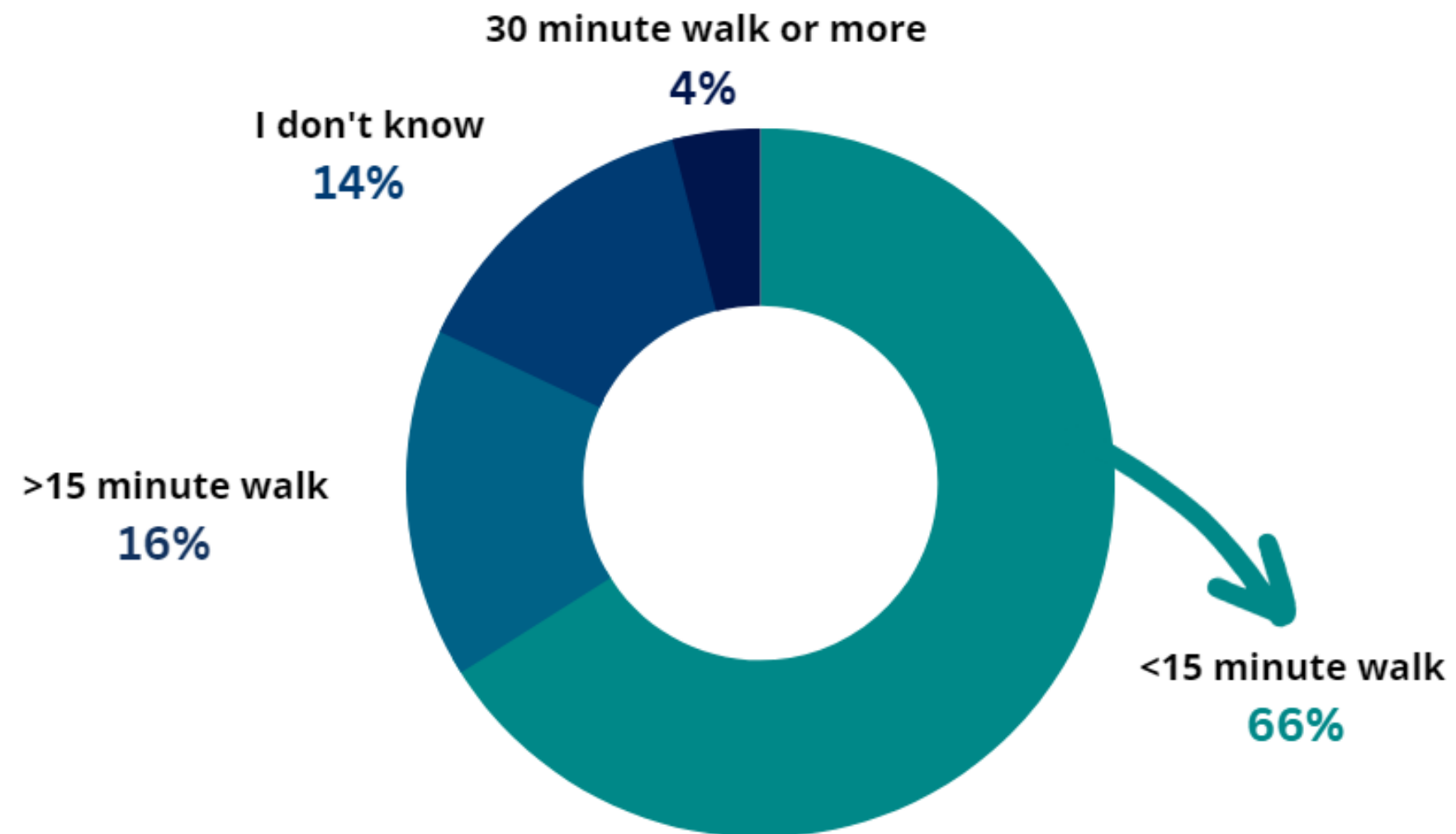
64%

60% of respondents indicated that their business/organization does not participate in regional transportation management.

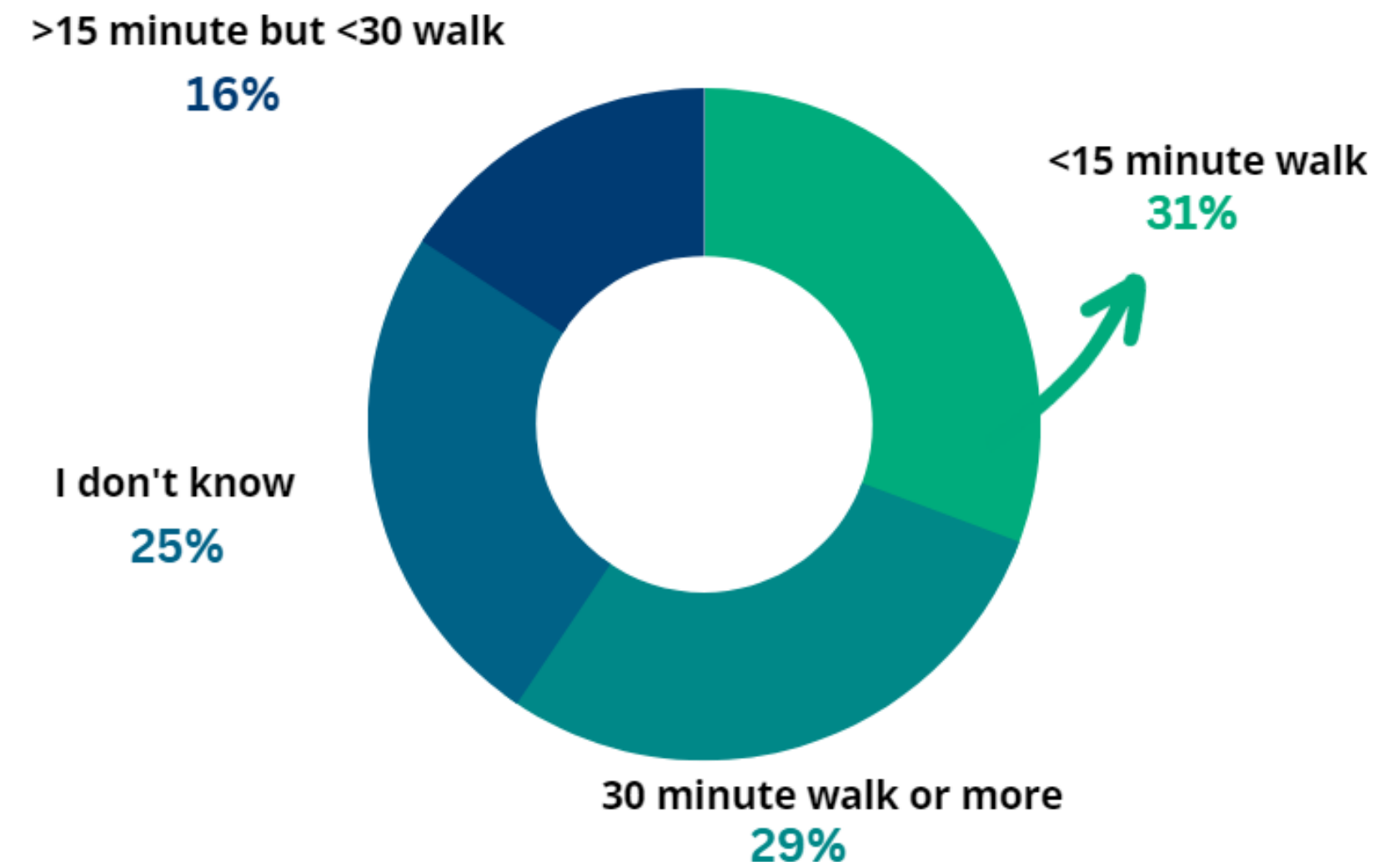
75% of respondents do not have an employee transportation coordinator or someone dedicated to promoting multimodal transportation on-site.

Distance to Nearest Public Transit Stop

Distance between your business/organization's location and the nearest bus stop.

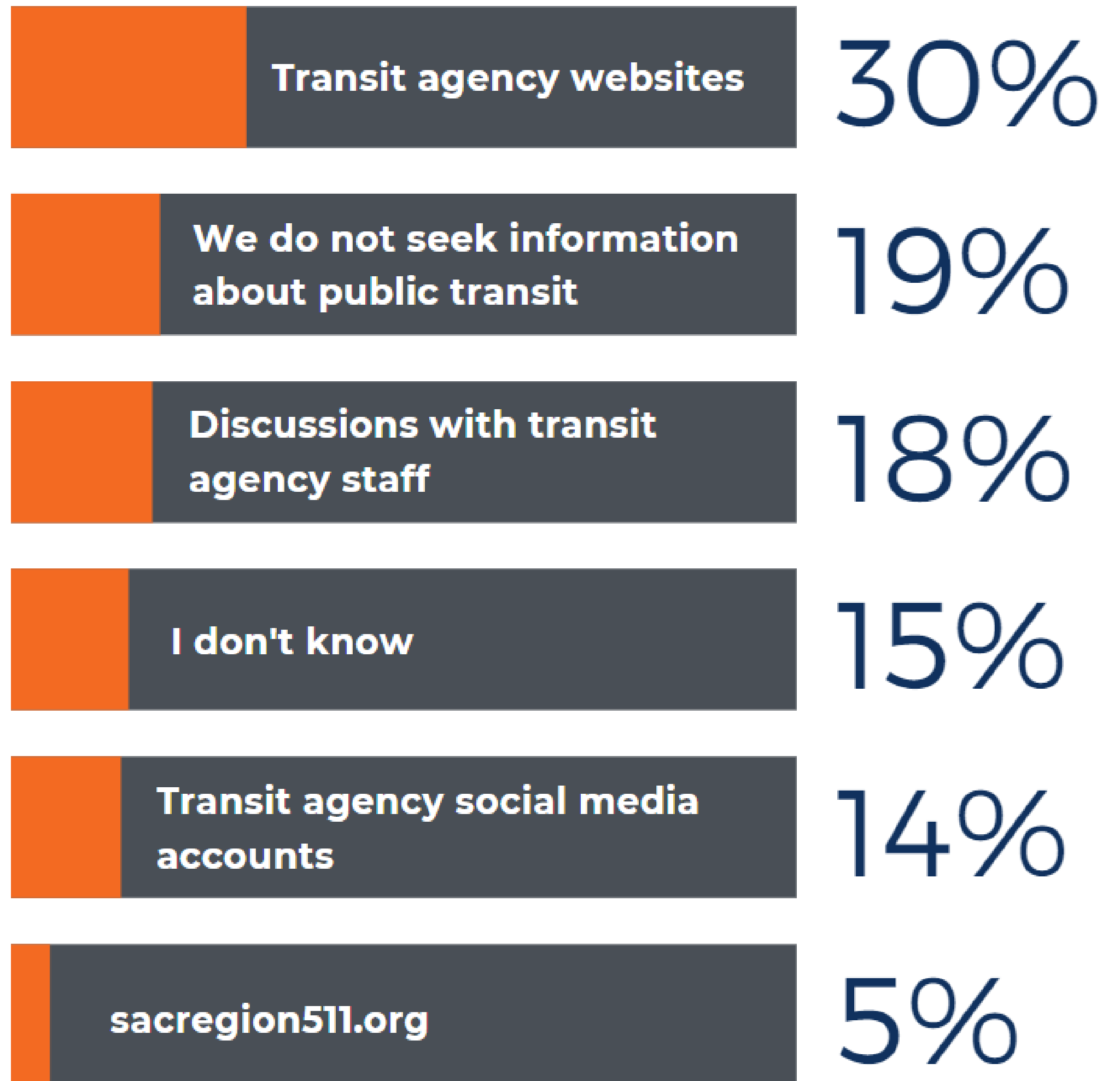


Distance between your business/organization's location and the nearest light rail stop.



Where are employers getting information about public transit options?

4% more respondents are using transit agency websites (compared to 26% in 2022). However, the amount of respondents who do not seek public transit information at all also increased by 4% (from 15% in 2022).



Leasing Agent Interviews Key Findings

- **Leasing agents reported increasing interest rates and inflation, the challenges in obtaining permits, competitive loans, and more.**
- **Landlords are increasing rent and tenants are unable to meet the new rates.**
- **Parking in the downtown area is a challenge.**
- **Office tenants are looking for shorter leases and smaller spaces. The needs are varied across industries. If they are a brick and mortar, it's a smaller operation.**
- **Storefronts are not as popular as they were pre-pandemic.**



- **There is increased interest outside the urban core (i.e. Placer County preference over Sacramento) because tenants are concerned about managing costs.**
- **Most lessors indicated public transportation was not a priority or concern for prospective tenants, with the exception of nonprofit organizational interest and industries that require high foot traffic for their business model.**
- **Tenant comments regarding transportation include; buses do not go as far as people need them to, concerns about safety, a need for more efficient public transit trips, and additional efforts needed to educate them about the public transportation system.**

Survey Key Findings

- **More employees are coming into the workplace. Nearly three-fourths of all respondents(68%) indicated that 76 - 100% of their workforce comes into the workplace at least once a week. This is a steep increase from the 2022 Employer Survey, where 50% of respondents said that 76 - 100% of their workforce comes in at least once a week.**
- **More employees are worried about commutes interfering with family or other obligations. In 2022, 17% of respondents said that commuting interferes with familial obligations. This number increased to 26% in this iteration of the Employer Survey.**



- **Employers are offering fewer transportation-related incentives. 63% of survey respondents said that their workplace does not offer any transportation-related incentives for their employees, which means that this number nearly doubled from last year's 35%.**
- **The use of coworking spaces has dramatically decreased post-pandemic. Only 3% of respondents supported employees utilizing co-working spaces compared to 31% in 2022.**

In Summary

The majority of employers continue to utilize a hybrid work structure and expect to maintain this structure for the next year. More team members are coming into the office than one year ago, with the majority able to choose their own schedule.

Most employers surveyed indicated only a small number of their staff are utilizing public transportation, and the majority are not offering any kind of transportation incentive. Transit agency websites were listed as the best source of information.

Employers surveyed were not interested in utilizing or considering the use of co-working spaces, and on-site parking is not a primary concern.

Leasing agent interviews indicate tenants are looking for shorter leases and smaller spaces, and there is less of a need for storefront properties. Rising rents, interest rates, and inflation are prompting tenants to be more budget-conscious and influencing their decisions.

Thank you!



For any questions, please contact **Renee John** at
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