

BAY AREA RETURN TO OFFICE FINAL REPORT

MAY 2025



Contents

Contents	1
Table of Figures	2
Appendix Data Tables	3
Executive Summary	4
Survey Overview	4
Workplace Patterns and Trends	5
Employer Incentives and Policies	6
Impact on Public Transit	6
Looking Ahead.....	7
Introduction	8
Chapter 1. Survey Overview	10
A. Trends in respondent participation	10
B. Employer location and office profile	12
C. Survey limitations	15
Chapter 2. Workplace Patterns and Trends.....	17
A. Evolution of the hybrid work schedule.....	17
B. Trends in employer return-to-office strategies.....	22

Chapter 3: Employer Incentives and Policies	24
A. Policy effectiveness	24
B. Employer incentives	28
Chapter 4: Impact on Public Transit	30
A. Trends in public transit use.....	30
B. Employer recommendations for transit agencies	33
Chapter 5: Key Takeaways and Looking Ahead	35
Looking Ahead	37
Acknowledgements	40
About BACEI	40
About MTC	40
About EMC.....	40
Appendix.....	41
Appendix data tables	42
Full Survey Questionnaires.....	51
1. May 2021- September 2021	51
2. October 2021 – June 2022.....	56
3. July 2022 – May 2023.....	60
4. September 2023 – May 2024	65
5. February 2025	69

Table of Figures

Figure 1. Total survey respondents by survey wave	11
Figure 2. Which industry sector is your organization most closely associated with?.....	12
Figure 3. In which Bay Area county or counties is your organization located?.....	13
Figure 4. How many offices or work locations does your organization have in the Bay Area that employees can visit or work in?	14
Figure 5. How many people does your organization employ in the Bay Area?	15
Figure 6. What is your best estimate of the frequency your Bay Area workforce comes to the workplace each week?	19
Figure 7. Average number of days the typical employee comes into the office each week	20
Figure 8. In six months, what are your best estimates at the days of the week that your Bay Area workforce comes/will come to the workplace each week?	21
Figure 9. As the Bay Area recovers from the COVID-19 pandemic, when do you expect to fully implement your company's long-term policy for in-person and remote work?.....	23
Figure 10. How effective is your current workplace attendance policy at achieving the in-person attendance your company would like?	25
Figure 11. How effective are the require/request policies that are currently in place?	26
Figure 12. In the past six months/next six months, have you changed/are planning to change your workplace attendance policy to increase how often your employees are coming in?	27
Figure 13. By company size, do you plan on changing your workplace attendance policy in the next six months or so to increase how often your employees are coming in?	28
Figure 14. Which of the following are available to your employees?.....	29
Figure 15. Thinking about your employees who come into the workplace, what is your best guess of the percentage that take public transit at least some of the time to get there?.....	31
Figure 16. For each of the following factors, please indicate whether you think that is a major reason your employees do not come to the workplace more often.	32
Figure 17. For each of the following factors, please indicate whether you think that is a minor reason your employees do not come to the workplace more often.	33
Figure 18. Thinking about what would be helpful for your employees, do you have any specific recommendations for Bay Area public transit agencies?.....	34
Figure 19. Pre-pandemic vs. right now vs. in six months, what is your best estimate of the frequency your Bay Area workforce comes/will come to the workplace each week?	37

Appendix Data Tables

Table A. Survey Respondents by Month and Associated Wave	42
Table B. Which industry sector is your organization most closely associated with?	43
Table C. Which industry sector is your organization most closely associated with?	44
Table D. Which Bay Area county/counties is your organization located? (Select all that apply)	45
Table E. How many offices or work locations does your organization have in the Bay Area that employees can visit or work in?	46
Table F. How many people does your organization employ in the Bay Area?	47
Table G. What is your best estimate of the frequency your Bay Area workforce comes to the workplace each week?	48
Table H. In six months, what are your best estimates at the days of the week that your Bay Area workforce comes/will come to the workplace each week?	49
Table I. As the Bay Area recovers from the COVID-19 pandemic, when do you expect to fully implement your company, long-term policy for in-person and remote work?	50

Executive Summary

Launched in response to the Bay Area's shifting commute and work patterns during the COVID-19 pandemic, the Return to Office survey has served as a key tool for understanding how regional employers are bringing workers back to the workplace. Administered across 27 waves between April 2021 and February 2025 by the **Bay Area Council** in partnership with **EMC Research** and funded by the **Metropolitan Transportation Commission (MTC)**, the Return to Office survey has informed public policymakers and transit agencies on current and future travel demand, and helped employers adopt peer best practices on hybrid work policies work models that combine both in-person and remote work.

The executive summary presents key findings from the report, organized by chapter:

Survey Overview

- Across all 27 survey waves, an average of 171 employers participated, with the most recent and final round (February 2025) receiving 236 employer responses.
- Professional (23%) and Government (12%) were the most represented sectors across all survey responses from all waves. The "Professional" category includes industries like tech, finance, and law, and many of the 13% who selected "Other" also fell into this group.
- The survey includes companies from all nine Bay Area counties, with San Francisco County (54%) the most represented across all responses, followed by Alameda County (32%) and Santa Clara County (22%).
- On average, 46% of surveyed employers operate from a single Bay Area-based office, 32% have two to four locations, and 14% have five or more.
- Survey participation was evenly distributed across company sizes, with the largest share coming from mid-sized companies. Employers with 101 to 1,000 employees made up 28% of respondents, followed by those with 25 to 100 employees (25%), fewer than 25 employees (24%), and more than 1,000 employees (22%).

Workplace Patterns and Trends

- In October 2021, employers reported that 32% of their employees never worked from the office – a figure that fluctuated in response to office reopening trends and public health developments, such as the Omicron variant surge. By February 2025, that figure stood at 11%, 21 percentage points lower than the first time the question was asked.
- The share of employees on a hybrid schedule (working from one to four days in the office) rose from 44% in October 2021 to 63% by February 2025 – with most hybrid workers coming in three to four days per week.
- As of February 2025, an estimated 25% of employees come into the office five days a week. When asked about plans six months from now (August 2025), employers predict that 27% will work in the office full-time, and another 62% of employees will work on a hybrid schedule.
- As of February 2025, employees are coming into the office an average of 3 days per week, compared to 2.3 days in late 2021.
- Office attendance has increased across all weekdays. Since we began tracking employer expectations by day of the week in July 2022, midweek attendance (Tuesday through Thursday) has risen by 18 percentage points, while Monday and Friday attendance has increased by 7 percentage points.
- The first time the survey was administered in April 2021, no respondents reported having implemented their long-term policies. At its highest point, in the March 2024 survey, 89% of respondents reported that they had implemented their long-term in-person attendance policies. In the February 2025 wave, that number fell to 84%.

Employer Incentives and Policies

- In February 2025, nearly half of employers reported that their approach to achieving their desired in-person attendance has been “very effective,” while another 44% said their strategy has been “somewhat effective.”
- In February 2025, 22% of respondents said they plan to implement changes to their workplace attendance policies within the next six months, while 39% have made adjustments in the past six months.
- 40% of employers with over 10,000 employees plan to change their attendance policies in the next six months – mainly to increase in-person work. Smaller employers were less likely to report upcoming changes, with just 10% of those with under 25 employees and 25% of those with 25 to 100 employees planning adjustments.
- The most common incentives found to encourage in-person work included: 1) complimentary office snacks or drinks (60%), 2) company-sponsored social events or activities (51%), and 3) free or subsidized public transit benefits (44%).

Impact on Public Transit

- From September 2023 to February 2025, employers said that on average 42% of their employees take public transit at least some of the time to get to work.
- When employers were asked to rank the factors that they believe contributed to their employees not coming into the workplace more often, the most common responses were: the amount of time it takes to commute to the workplace, preference for working from home, and the cost of commuting to the workplace.
- When asked for recommendations to transit agencies, respondents most often cited: safety and security improvements, cleanliness, scheduling and frequency refinements, connectivity and integration upgrades, and cost.

Looking Ahead

- In the latest survey wave, the majority of employers say their employees are working in-person three to five days per week, with core in-person days on Tuesdays, Wednesdays, and Thursdays. Bay Area employers believe that more of their employees will come into the workplace four to five days per week in the next six months (by August 2025), while the number of employees working zero to two days per week from the workplace will fall.
- As of February 2025, 16% of respondents said they still had not yet implemented their long-term office attendance policy, and 22% of respondents plan to change their office attendance policy in the next six months either by requiring attendance, increasing required in-office days, or making another policy change like mandatory in-person meetings or events, stricter enforcement mechanisms, or department-specific requirements.
- Large employers are more likely to be planning an attendance policy change when compared to smaller employers.
- As of February 2025, the vast majority of employers view their office attendance policies as effective: 44% of employers describe their policy as somewhat effective, and 49% as very effective in achieving their desired outcome. Those employers that require office attendance rather than request it are more likely to describe their policy as very effective.

Introduction

Due to extended shutdowns from the COVID-19 pandemic, work-from-home policies implemented by Bay Area employers, and a reduction in travel, the Bay Area's downtown cores have experienced a hollowing out of economic activity. Since 2020, the pandemic has changed how businesses choose their locations, how households choose where to live, how people choose to work, and how employees choose to commute.

These shifts have deeply affected the Bay Area's transit system. A significant reduction in daily ridership has led to an inflection point for many of the region's transit agencies, particularly those heavily reliant on farebox revenue. The financial strain on transit agencies, combined with uncertainty around future ridership patterns, has required agencies to rethink service levels, operational models, and funding strategies. Starting in April 2021, the Bay Area Council (BAC), in partnership with EMC Research and with funding from the Metropolitan Transportation Commission (MTC), reached out to Bay Area Council member companies, chambers of commerce, educational institutions, partner organizations, and other peer-to-peer referrals to take part in a Return to Transit survey, later rebranded the Return to Office survey. The survey was designed to inform transit agencies, public policymakers, and other local stakeholders about employers' plans for employees to return to the office so all could plan accordingly.

The survey was initially administered monthly from April to September 2021 to track employers' reopening plans and workplace strategies. It was first revised in October 2021 and ran through June 2022, then updated again in July 2022 and conducted every other month through May 2023. After a three-month pause, data collection resumed with a modified questionnaire from September 2023 to May 2024. Following an eight-month hiatus, the final wave was fielded in February 2025 with 236 respondents. Across 27 waves, the survey evolved to reflect shifting trends in return-to-office policies, remote work, and commute patterns.

On average, 171 employers took the survey each round, with the highest representation from San Francisco County. The survey included responses from employers from all nine Bay Area counties and across sectors; however, the data was not intended to be a random, representative sample of Bay Area employers that could be projected with statistical reliability. Data tables and survey questionnaires are included in the **Appendix**.

While the survey was modified multiple times over the four years it was administered, employers were always asked about their in-person work requirements and hybrid work policies. The survey results have provided key insights into how employers' Return to Office (RTO) policies have evolved over time. Many organizations have adopted hybrid policies, requiring employees to be in the office for anywhere from one to four days per week. Some companies, recognizing the importance of maintaining a collaborative workplace environment, have offered incentives, such as company-sponsored social events or flexible work schedules, to encourage in-person attendance.

As Bay Area policymakers and transit agencies respond to shifting commute and work patterns, this research serves as a vital tool for decision making. Understanding employer policies and commuter behavior will be essential for tailoring transit services to meet demand, ensuring the transit system's long-term financial sustainability, and fostering economic recovery in urban centers. The findings will also contribute to discussions about public transportation funding, service optimization, and the broader role of transit in supporting regional economic growth and accessibility.

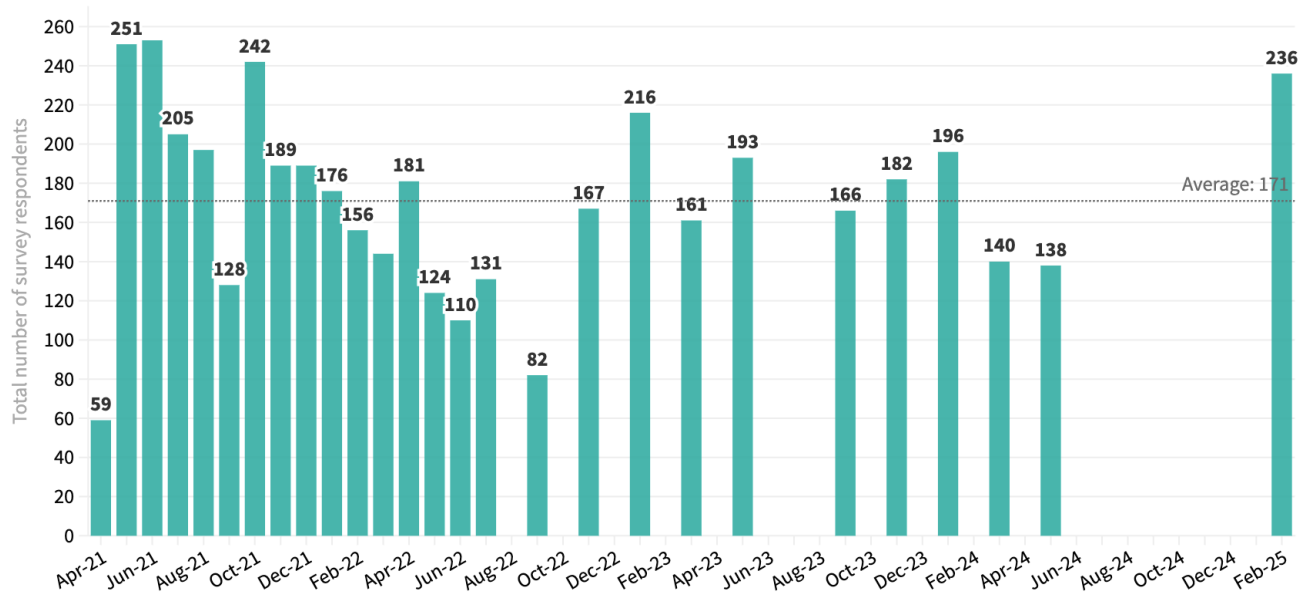
Chapter 1. Survey Overview

Understanding workplace reopening trends and their impact on commuting behavior is critical for shaping public policy and transportation planning in the Bay Area. This chapter provides an overview of the survey methodology, response trends, and key characteristics of participating employers. It begins by examining the survey's reach, including response volume over time, geographic representation, industry breakdown, and office locations. Charts represent a weighted average across all surveys in which a particular question was asked. For full data on each survey period, see the **Appendix**. The chapter also highlights survey limitations, such as sector overrepresentation and the challenge of aligning survey responses with broader employment distributions across the Bay Area.

A. Trends in respondent participation

The Return to Office survey initially launched in April 2021 to track workplace reopening plans and monitor shifts in commuting behavior. Over the years, the survey underwent multiple revisions – in October 2021, July 2022, and September 2023 – to capture the changing dynamics of workplace policies and to provide more relevant insights for transportation policymakers and transit agencies. Recurrent surveys concluded in May 2024 until one was added in February 2025 with additional revisions. Across 27 survey waves, participation peaked at 253 respondents in a single month, with the most recent wave in February 2025 receiving 236 responses. On average, 171 employers took part in each survey cycle (**Figure 1**).

Figure 1. Total survey respondents by survey wave

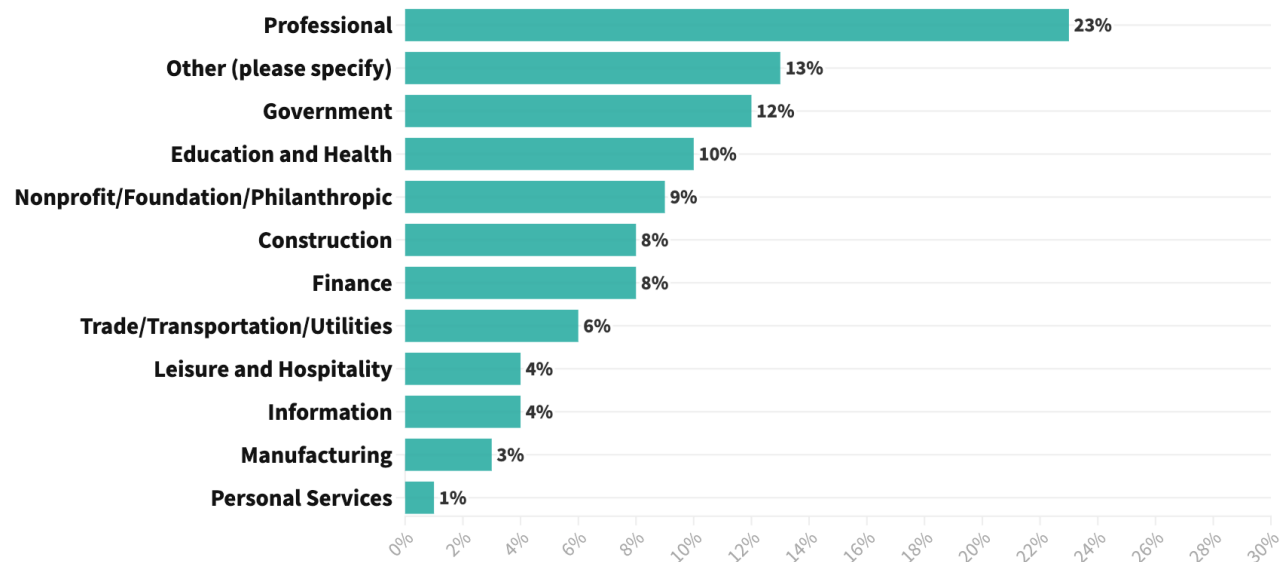


Source: Bay Area Return to Office Survey. **Analysis:** Bay Area Council Economic Institute. **Note:** Starting in September 2022, survey frequency moved to every other month. There was a three-month hiatus from May to September 2023 as the survey was modified. Please see **Appendix Table A.** for full data table.

Across all surveys, the weighted average of the top three respondent sectors were Professional (23%), Other (13%), and Government, (12%) (**Figure 2**). The latest survey iteration introduced refinements to industry classifications, offering more granular insights: “Professional Services” and “Education and Health” were subdivided into more specific categories to give insight into the types of employers in the “Professional” industry. The new industries were 1) Real Estate, 2) Legal and Accounting, 3) Architecture and Design, 4) Media, 5) Biotech/Life Sciences/R&D, and 6) Technology. Among the newly categorized industries, Technology and Real Estate were the most represented, each accounting for 8% of responses. Given this industry breakdown, the survey findings regarding employer trends and work schedules will be more reflective of the policies of the “Professional” industry.

Figure 2. Which industry sector is your organization most closely associated with?

Represented as a weighted average across all 27 survey waves



Source: Bay Area Return to Office Survey. Analysis: Bay Area Council Economic Institute. Note: In February 2025, "Professional Services" was dissolved to include the following subsectors: Real Estate, Legal and Accounting, Architecture and Design, Media, Biotech/Life Sciences/R&D, and Technology. "Finance" was updated to add Insurance, and "Education and Health" was split into two separate sectors. See **Appendix Table B** for full data table and **Appendix Table C** for the detailed categorical breakdown for February 2025.

B. Employer location and office profile

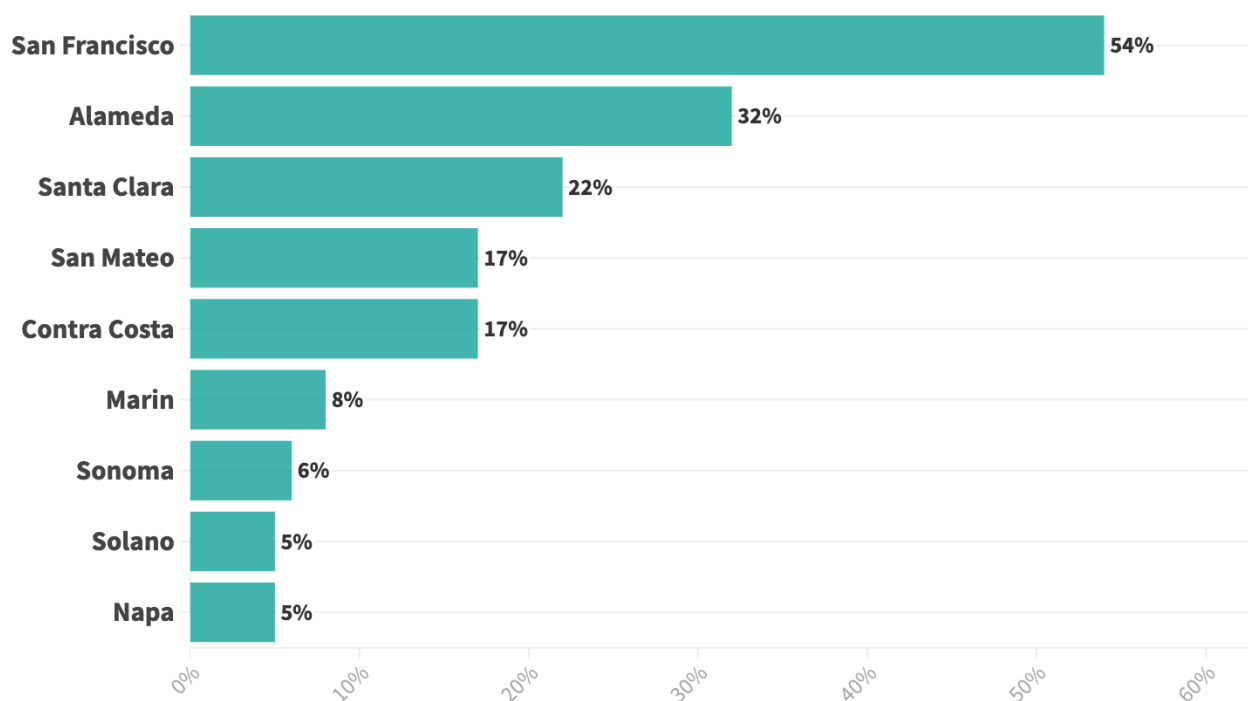
The survey includes companies from all nine Bay Area counties, with the highest representation consistently from San Francisco (54% across all survey waves), followed by Alameda (32%) and Santa Clara (22%) (**Figure 3**). Because respondents could select multiple counties to reflect various office locations, total responses exceed 100%. However, this distribution does not fully align with the actual concentration of businesses in the region, leading to an overrepresentation of San Francisco employers and an underrepresentation of Santa Clara County companies.

According to the Bureau of Labor Statistics, Santa Clara County accounts for nearly 24% of the region's businesses, compared to San Francisco's 19% – a difference of approximately 34,000 establishments. Despite this, San Francisco remains a jobs

center, with significantly more workers traveling from across the region than other counties, where residents are more likely to work locally. However, this overrepresentation appropriately reflects San Francisco's central role in regional commuting patterns. Additionally, the Bay Area Council's employer network is more concentrated in San Francisco.

Figure 3. In which Bay Area county or counties is your organization located?

Represented as a weighted average across all 27 survey waves

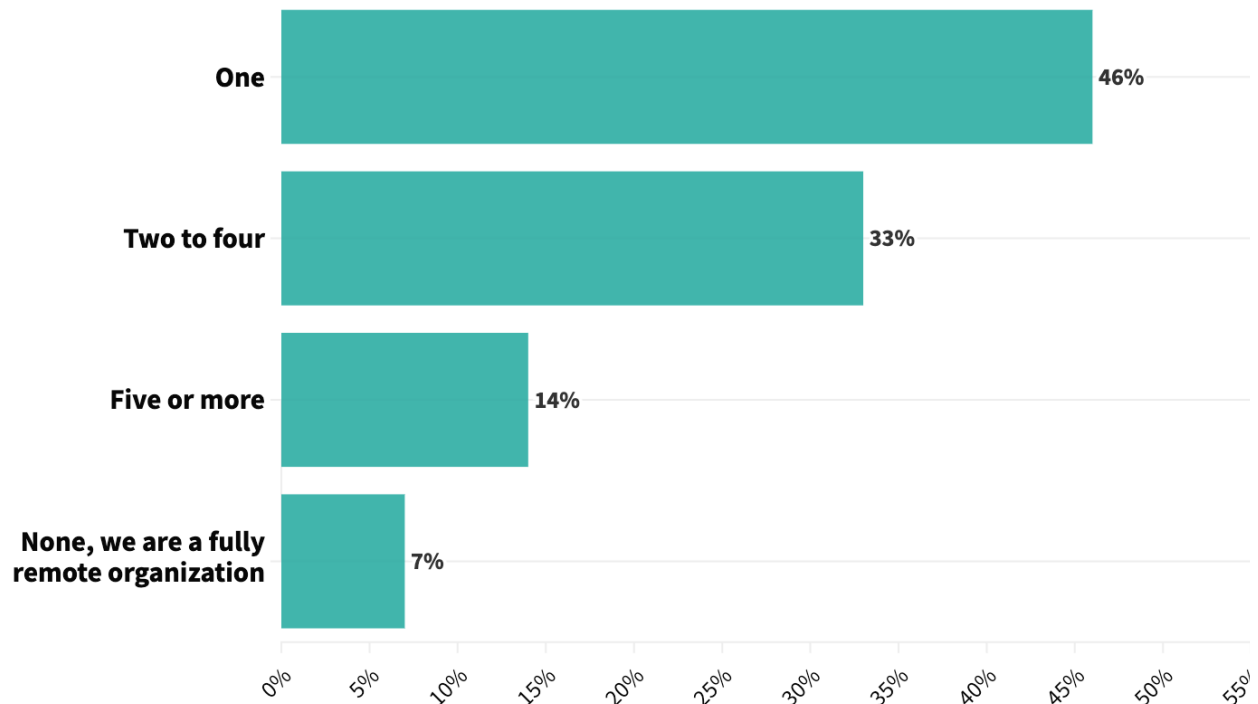


Source: Bay Area Return to Office Survey. **Analysis:** Bay Area Council Economic Institute. **Note:** Percentages exceed 100% as respondents could select more than one option. Please see **Appendix Table D.** for full data table.

On average, most surveyed employers operate with one office to work from (46%), while 33% have two to four offices to work from, and 14% have five or more offices to work from (**Figure 4**). Respondents based on the number of employer offices varied slightly between waves of the survey, but the largest categories have remained consistent. Because of this breakdown, the survey data reflects an equal number of employers operating from one office (46%) and two to five or more offices (47%).

Figure 4. How many offices or work locations does your organization have in the Bay Area that employees can visit or work in?

Represented as a weighted average across six survey waves (question introduced in September 2023)

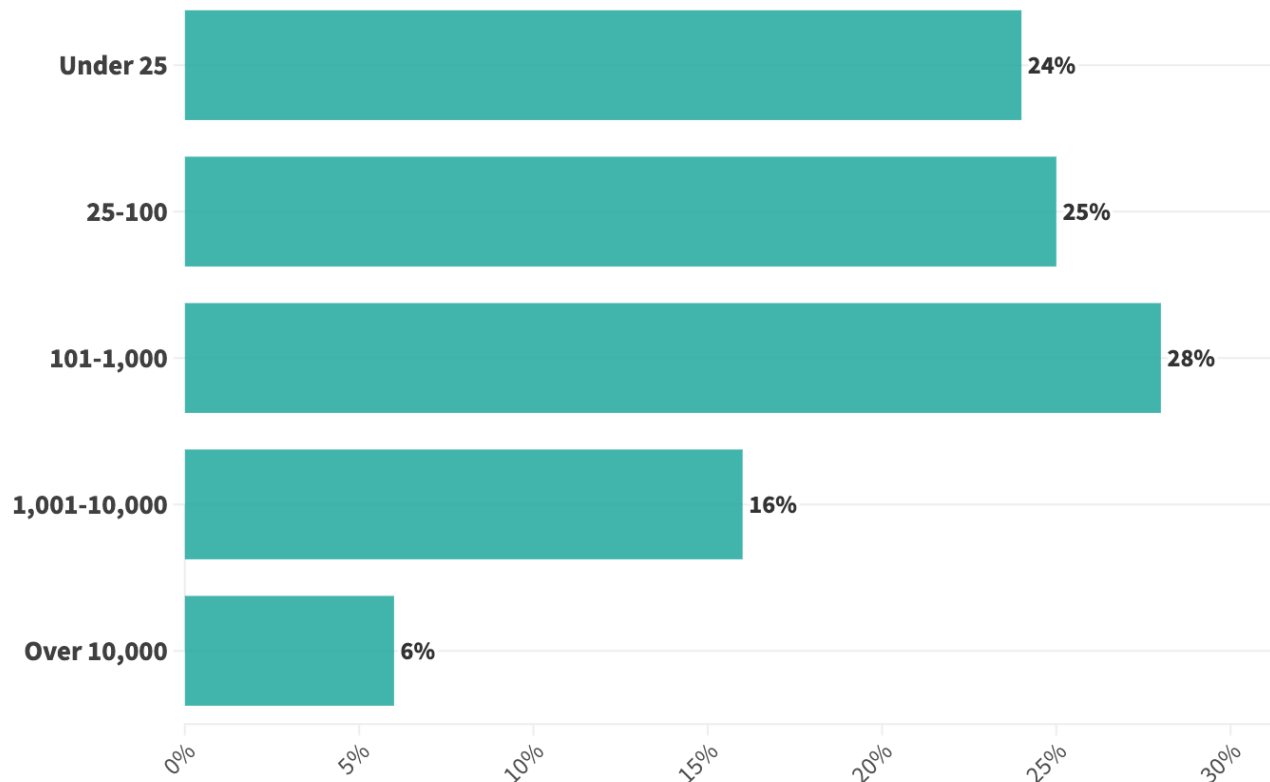


Source: Bay Area Return to Office Survey. **Analysis:** Bay Area Council Economic Institute. Please see **Appendix Table E.** for full data table.

The majority of survey respondents across all surveys represented mid-sized companies, with 101-1,000 employees making up the largest share (28%), followed closely by companies with 25-100 employees (25%) and those with fewer than 25 employees (24%). Larger organizations, including those with 1,001-10,000 employees (16%) and over 10,000 employees (6%), are less represented in the survey sample (**Figure 5**). Given this distribution, trends such as return-to-office policies, hybrid work adoption, and workplace flexibility may be more indicative of the experiences of small to mid-sized businesses. Hybrid work policies encompass a variety of models, but refer to arrangements that combine both in-person and remote work.

Figure 5. How many people does your organization employ in the Bay Area?

Represented as a weighted average across all 27 survey waves



Source: Bay Area Return to Office Survey. **Analysis:** Bay Area Council Economic Institute. Please see **Appendix Table F.** for full data table.

C. Survey limitations

Throughout the survey’s administration, several factors have introduced limitations that should be considered when interpreting the results. Response rates have fluctuated significantly, impacting the reliability of certain findings. Sample sizes (n) have varied widely, from as few as 59 responses (April 2021) to over 250 (May and June 2021), with considerable variation across different survey waves. More recently, response rates have remained inconsistent, with May 2024 capturing only 138 responses compared to 236 in February 2025 (**Figure 1**). This variability complicates longitudinal analysis, making it difficult to distinguish true shifts in attitudes and behaviors from changes in

the sample composition. For example, May 2024 data may appear as an outlier, likely due to a higher share of smaller employers: 65% of employers that month had 100 or fewer employees, compared to the 49% average across other survey waves. This imbalance may have influenced results, particularly on workplace policies and flexibility. Slight adjustments to survey questions over time have also introduced challenges in tracking precise trends.

Sampling bias also affects the representativeness of the findings, as the survey does not capture an entirely balanced cross-section of industries, company sizes, or worker demographics. For example, the professional services sector is consistently overrepresented, while industries such as retail, hospitality, and manufacturing – where in-person work is more common – are underrepresented. Finally, self-selection bias may also influence the results, as those with strong opinions on return-to-office policies are more likely to participate. As a result, industries and roles that have hybrid or remote work policies may be overrepresented, while sectors requiring in-person attendance, such as healthcare, manufacturing, and hospitality, may be underrepresented, further shaping the survey's outcomes.

Chapter 2. Workplace Patterns and Trends

In-person work has undergone a sweeping transformation over the last five years. While the prevalence of remote work has significantly declined since the height of the COVID-19 pandemic, full-time office attendance remains far below pre-pandemic levels. Most employers have shifted toward hybrid work arrangements – particularly the three or four day in-person schedule – which has had significant impacts on transit ridership recovery and regional economic activity.

This chapter examines the evolving trends in workplace attendance and employer return-to-office policies. It begins by analyzing how the frequency of in-person work has changed over time, and then turns to the specific days employees most commonly work in-person, providing insights into peak commuting trends. These results are essential for understanding the long-term shifts in workplace behavior and their implications for the transit system and the Bay Area’s post-pandemic economic recovery.

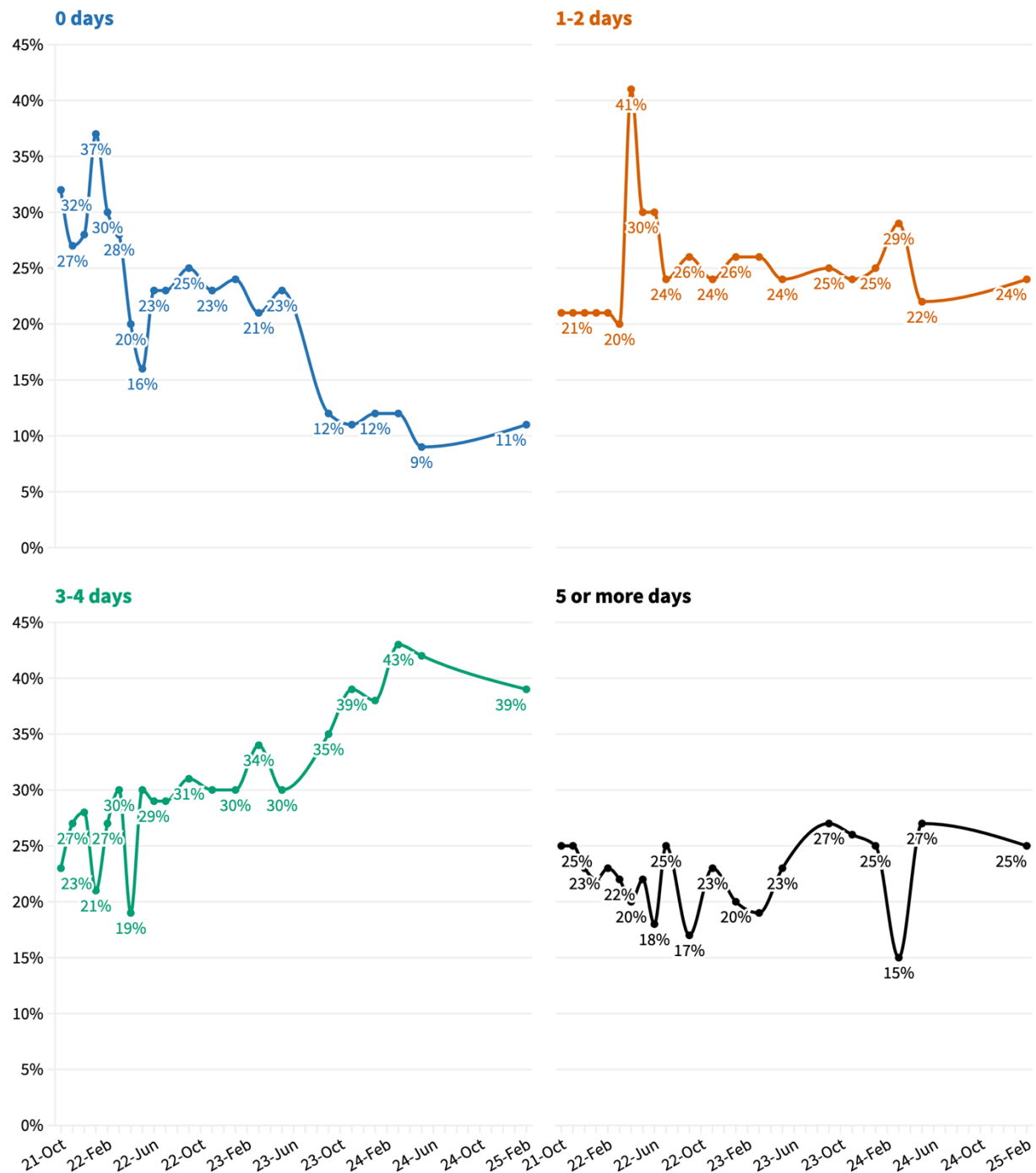
A. Evolution of the hybrid work schedule

In October 2021, when employers were first asked about how often their employees worked in-person, they reported that 32% of their employees never worked from the office. This “fully remote” response was higher than all other frequency categories, including 1-2 days, 3-4 days, and 5+ days of in-person work. By December 2021, the number of respondents who reported that their employees never worked in-person decreased to 27%, as businesses began reopening and employees returned to the office. However, by January 2022, the share of employees never coming into an office rose again to 37%, likely driven by the Omicron variant surge, which prompted many employers to temporarily reinstate remote work policies.

As pandemic-related health concerns receded, the percentage of respondents who reported their workforce as being fully remote exhibited a steady downward trajectory, ultimately reaching 11% by February 2025, a full 26 percentage points lower than the peak of 37% three years prior (**Figure 6**).

Despite this shift, the percentage of employees working in-person five or more days per week has remained relatively low. At no point since the survey's inception has this category exceeded 27% – a stark contrast to pre-pandemic levels, when nearly all office-based employees followed a full-time in-person schedule (**Figure 6**). Instead, hybrid work arrangements have emerged as the dominant standard. The share of employees working from one to four days per week in the workplace has grown significantly, rising from 44% in October 2021 to 63% in February 2025. When asked in the February 2025 survey about plans six months from now, employers said that 62% of employees will work hybrid, and 27% will come into the office five days a week, a slight increase from the 25% reported in February 2025. In September 2021, employers were asked what their estimates of how many days employees worked in-person pre-pandemic were. The overwhelming majority (76%) said five or more days, 24% reported one to four days, and 0% reporting no days in-person. The question was removed from the survey after September 2021 as answers to the question remained consistent.

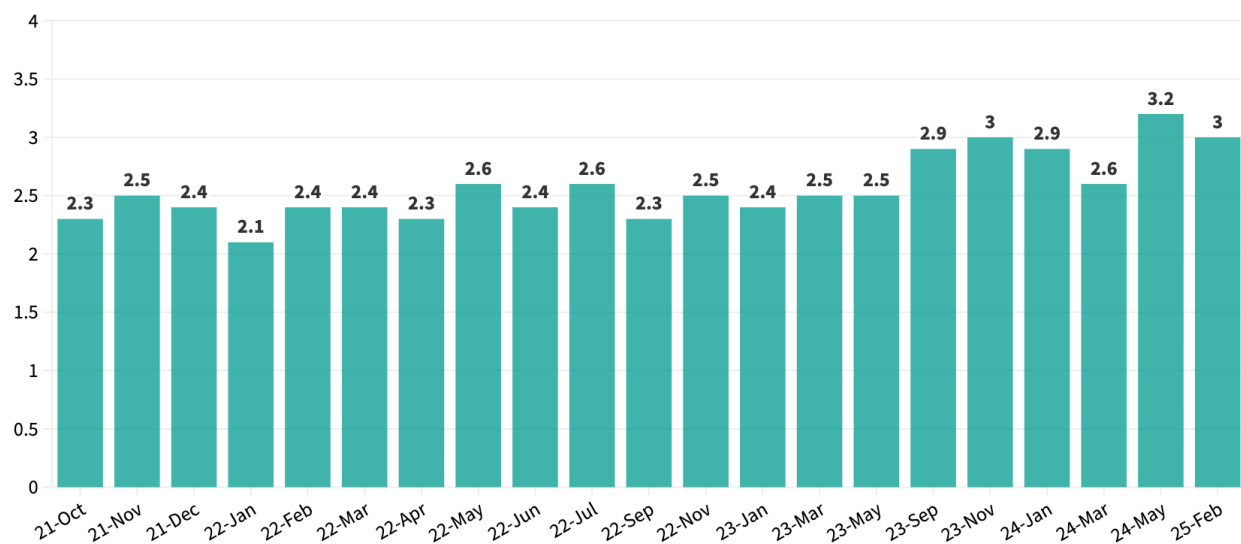
Figure 6. What is your best estimate of the frequency your Bay Area workforce comes to the workplace each week?



Source: Bay Area Return to Office Survey. **Analysis:** Bay Area Council Economic Institute. **Note:** 1+2 and 3+4 days were combined for clarity. Please see **Appendix Table G.** for full data table.

When evaluating typical in-person attendance per week as an average, the data indicates a gradual but consistent increase in employee presence in the workplace. As of February 2025, employees are coming into the office an average of three days per week, compared to 2.3 days in late 2021. This shift suggests employers' growing preference for a three-day in-person schedule.

Figure 7. Average number of days the typical employee comes into the office each week

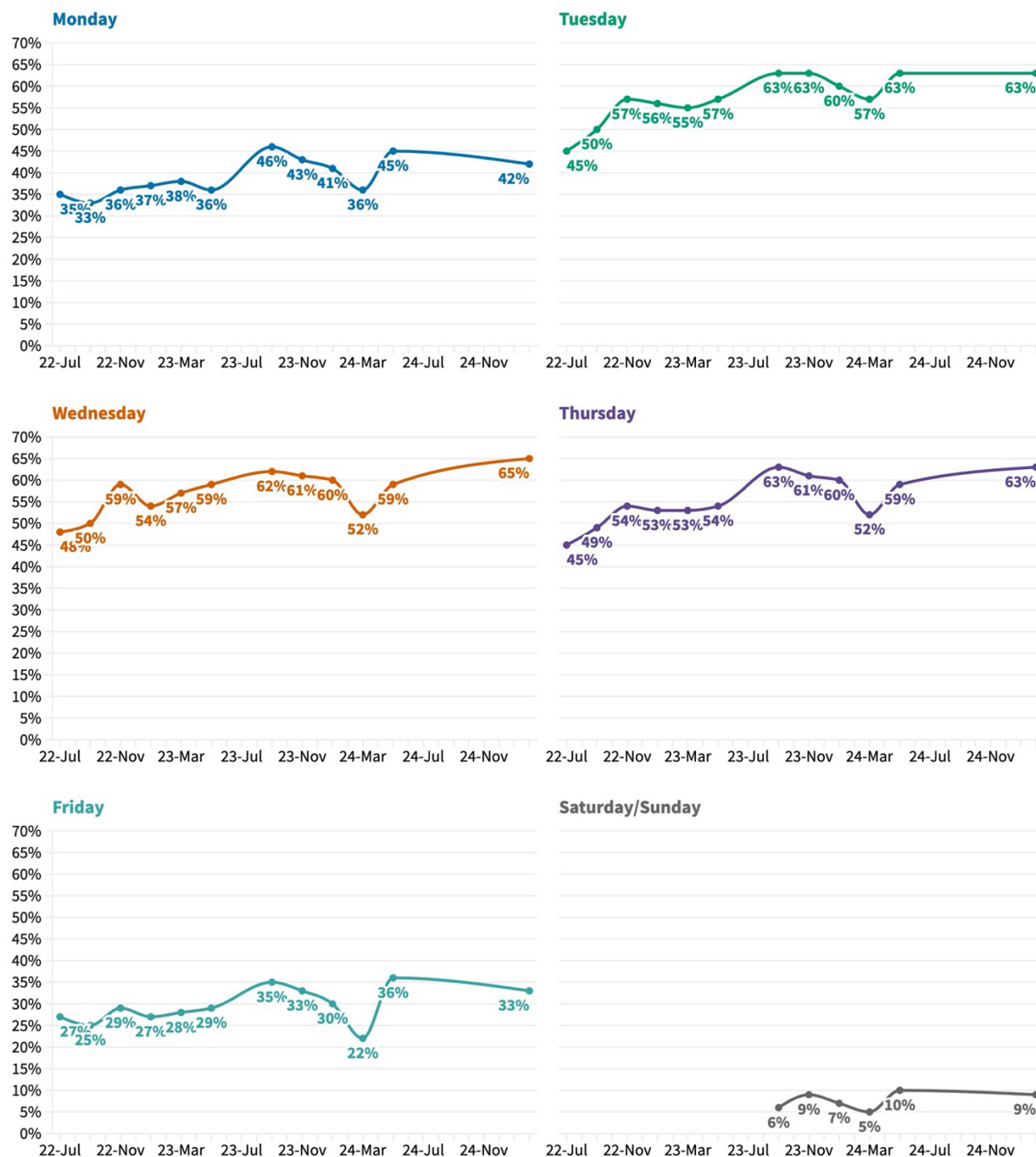


Source: Bay Area Return to Office Survey. **Analysis:** Bay Area Council Economic Institute.

Notably, Tuesdays, Wednesdays, and Thursdays have become the primary in-person days, with these days seeing the highest levels of employee attendance. However, office attendance estimates have risen across all weekdays: Since July 2022, estimates for attendance during the middle of the week (Tuesday through Thursday) has increased 18 percentage points, and attendance on Mondays and Fridays has increased 7 percentage points. (Figure 8).

This trend is consistent with other data on daily office attendance. Kastle Systems, which tracks badge swipes in major office buildings across the largest U.S. metro areas, reports that [offices are 60% occupied on Tuesdays but drop to just 28% on Fridays](#).

Figure 8. In six months, what are your best estimates at the days of the week that your Bay Area workforce comes/will come to the workplace each week?



Source: Bay Area Return to Office Survey. **Analysis:** Bay Area Council Economic Institute. **Note:** Saturday/Sunday was added as an option in September 2023. Please see **Appendix Table H.** for full data table.

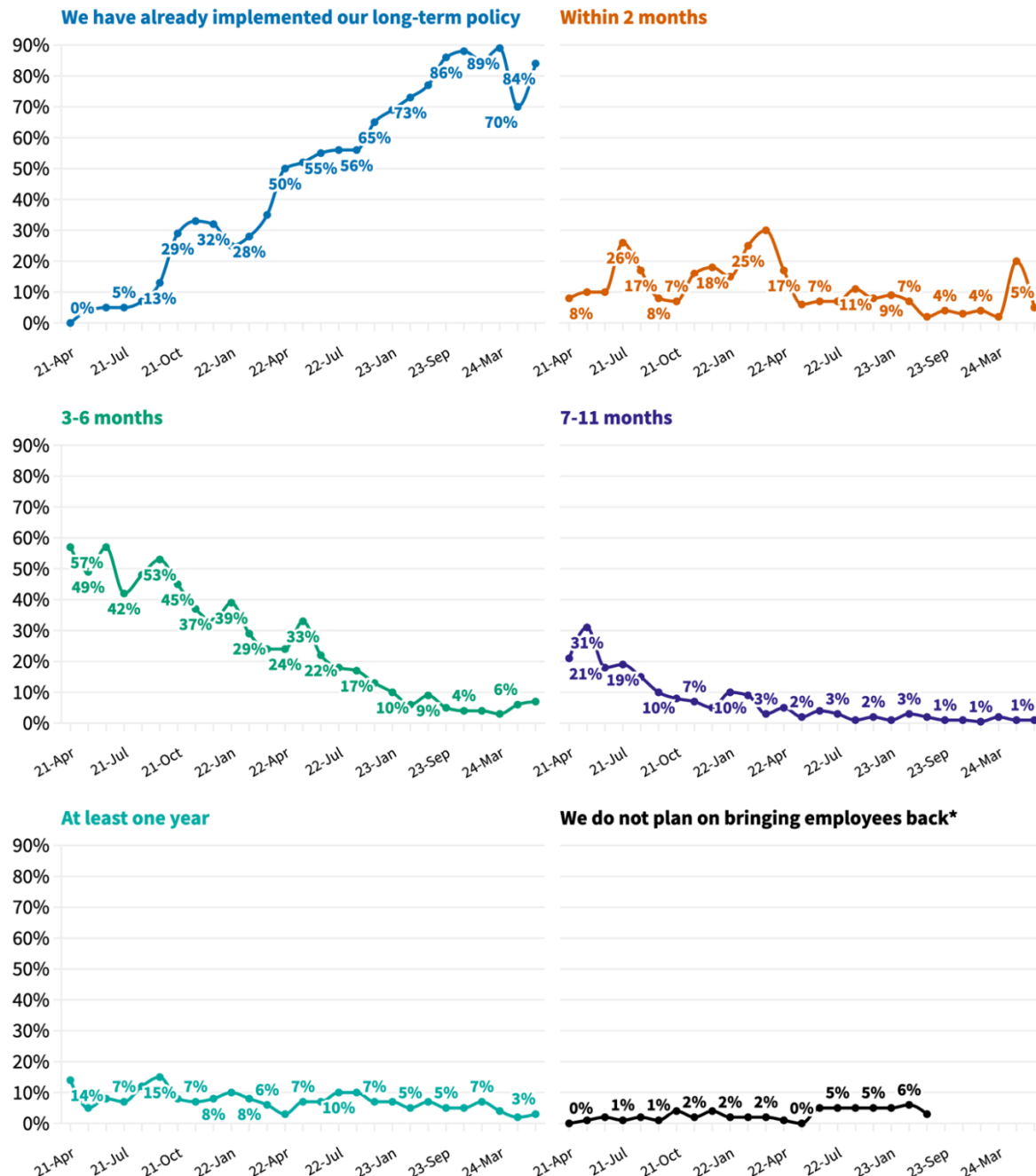
B. Trends in employer return-to-office strategies

A core objective of the Return to Office survey has been to assess employers' long-term strategies regarding in-person work requirements. These strategies are critical in shaping regional economic recovery, transit demand, and commercial real estate markets. Despite modifications to the survey over time, employers were always asked about their implementation of long-term return-to-office policies. At the beginning of the survey in April 2021, no employers reported having a permanent policy in place. A year later, in April 2022, 50% of employers said they had implemented their long-term policies. Over the subsequent 13 waves of survey data collection, this percentage of employers who reported having fully implemented their long-term policy steadily increased, peaking at 89% in March 2024 (**Figure 9**). In February 2025, 84% of employers reported that they already had implemented their long-term attendance policy.

Results from May 2024 illustrated a significant decline in the share of employers saying they have finalized their policies, largely attributable to a respondent pool that month that heavily skewed toward smaller employers (see Chapter 1, Section C on survey limitations for more detail). Comparing February 2025 to March 2024 is a more meaningful comparison, as these months align seasonally and represent a similar respondent pool consistent with other survey waves. The decrease from 89% to 84% of employers reporting full implementation of their long-term policies suggests that while most organizations have not changed their policies over the last year, some have begun reassessing their approach in response to evolving workforce dynamics, economic conditions, and operational priorities.

The share of employers requiring employees in the office hit an all-time high of 68% in the latest survey wave in February 2025, and the share of employers with no specific expectations for workplace attendance hit an all-time low of 6%. While organizations increasingly mandate in-person attendance, these trends still reflect growth toward hybrid policies, as illustrated in **Figure 7** (average number of days in office per week is three), as many employers continue to maintain flexibility around remote work.

Figure 9. As the Bay Area recovers from the COVID-19 pandemic, when do you expect to fully implement your company's long-term policy for in-person and remote work?



Source: Bay Area Return to Office Survey. **Analysis:** Bay Area Council Economic Institute. **Note:** *We do not plan on bringing employees back was removed as a response option in September 2023. Prior to that month, the question read: "From today, when do you think your new long-term "normal" will be fully implemented in your organization? See **Appendix Table I.** for full data table.

Chapter 3: Employer Incentives and Policies

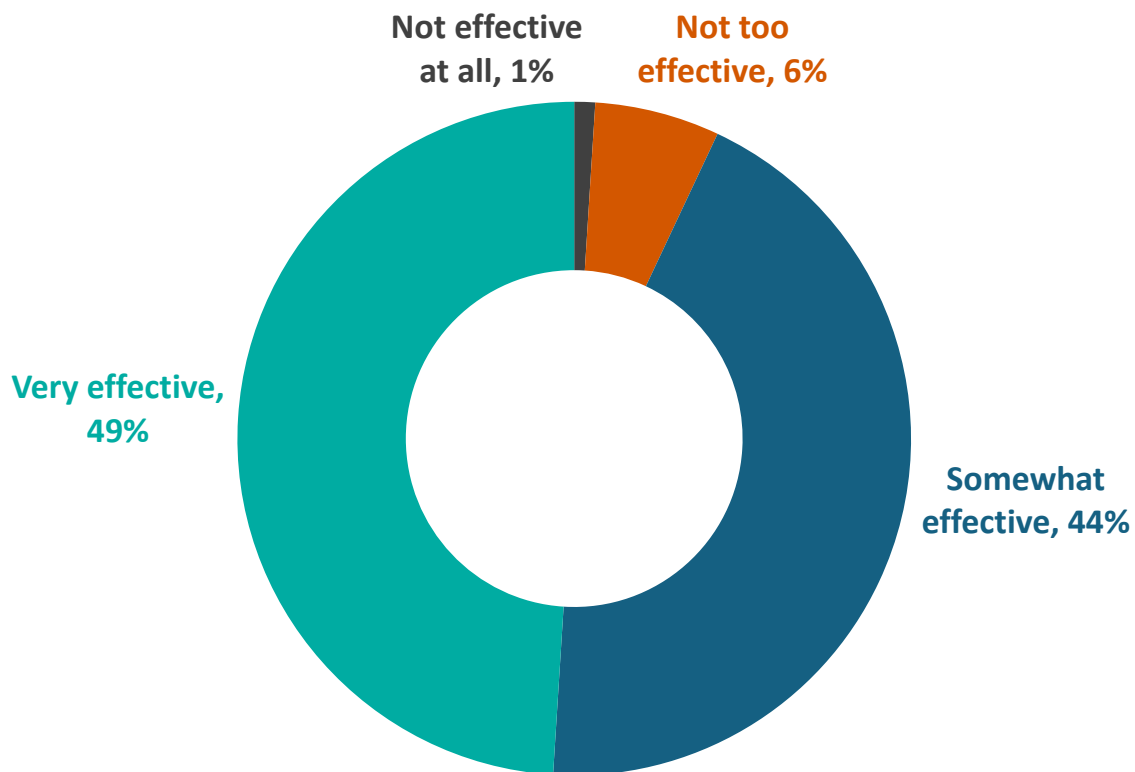
As hybrid and remote work arrangements remain widespread, employers continue to navigate the challenge of encouraging in-person attendance. While employee preference for working from home has been the dominant factor limiting workplace presence, the latest survey results indicate a shift – commute time has now emerged as the primary deterrent. With traffic congestion increasing and transit ridership still below pre-pandemic levels, commuting challenges have become a growing concern for both employees and employers.

This chapter explores the key factors influencing workplace attendance and the strategies employers are using to encourage in-person work. It begins by evaluating workplace policy effectiveness. The chapter will then analyze employer survey responses for the most common reasons employees do not go into the office and contextualize the data with employer policies on in-person attendance, including the effectiveness of existing requirements and planned policy changes. Finally, the chapter discusses the various incentives and required benefits employers offer to encourage office attendance, ranging from complimentary office perks and social events to financial incentives.

A. Policy effectiveness

In the February 2025 survey, a new question asked employers about the effectiveness of their workplace attendance policies to better understand how well they are achieving their desired in-person attendance. Nearly half of employers reported that their approach has been “very effective” in achieving their desired in-person attendance, while another 44% said their strategy has been “somewhat effective.” These combined response rate reflects an overall positive evaluation of return-to-office strategies. Smaller shares of employers indicate that their policies have been “not too effective” (6%) or “not effective at all” (1%) (**Figure 10**).

Figure 10. How effective is your current workplace attendance policy at achieving the in-person attendance your company would like?

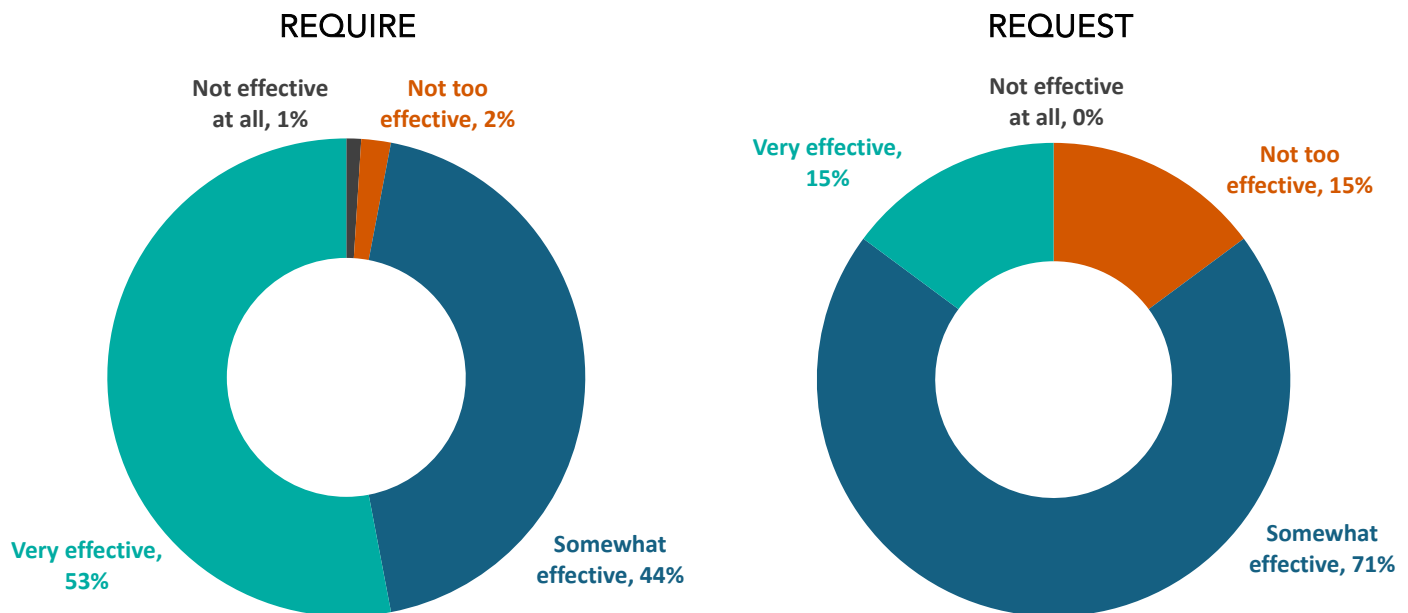


Source: Bay Area Return to Office Survey. **Analysis:** Bay Area Council Economic Institute. **Note:** This was a new question asked in February 2025.

When evaluating effectiveness based on whether an employer requires or requests workplace attendance, a clear contrast emerges: 71% of employers with request-only policies consider them somewhat effective, while only 15% view them as very effective (Figure 11). By contrast, policies that require workplace attendance are much more successful in driving an employer’s desired outcomes, with 53% of employers describing them as very effective and 44% finding them somewhat effective. This result suggests that mandatory policies have a significantly greater impact on ensuring employees return to the office compared to more voluntary approaches.

Figure 11. How effective are the require/request policies that are currently in place?

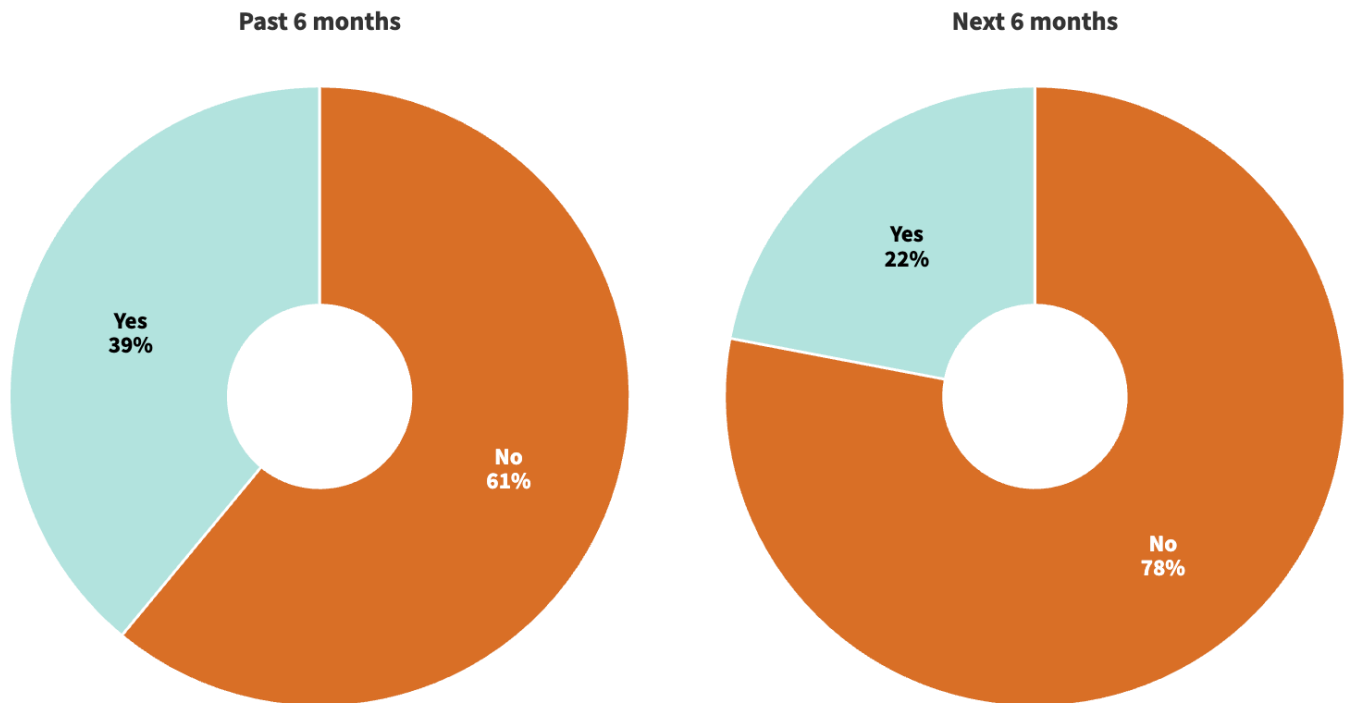
This graph shows a crosstab of two questions, “Do you currently require or request some or all employees to visit or work in the workplace a certain number of days each month or week?” and “How effective is your current workplace attendance policy at achieving the in-person attendance your company would like?”



Source: Bay Area Return to Office Survey. **Analysis:** Bay Area Council Economic Institute. **Note:** This was a new question asked in February 2025.

Workplace policies regarding in-person attendance continue to evolve as employers adapt to shifting business needs, employee preferences, and broader economic conditions. The February 2025 survey results indicate that 22% of respondents plan to implement changes to their workplace attendance policies within the next six months, while 39% have already made adjustments in the past six months (Figure 12). These adjustments reflect ongoing efforts to refine return-to-office strategies in response to workforce dynamics and operational requirements.

Figure 12. In the past six months/next six months, have you changed/are planning to change your workplace attendance policy to increase how often your employees are coming in?

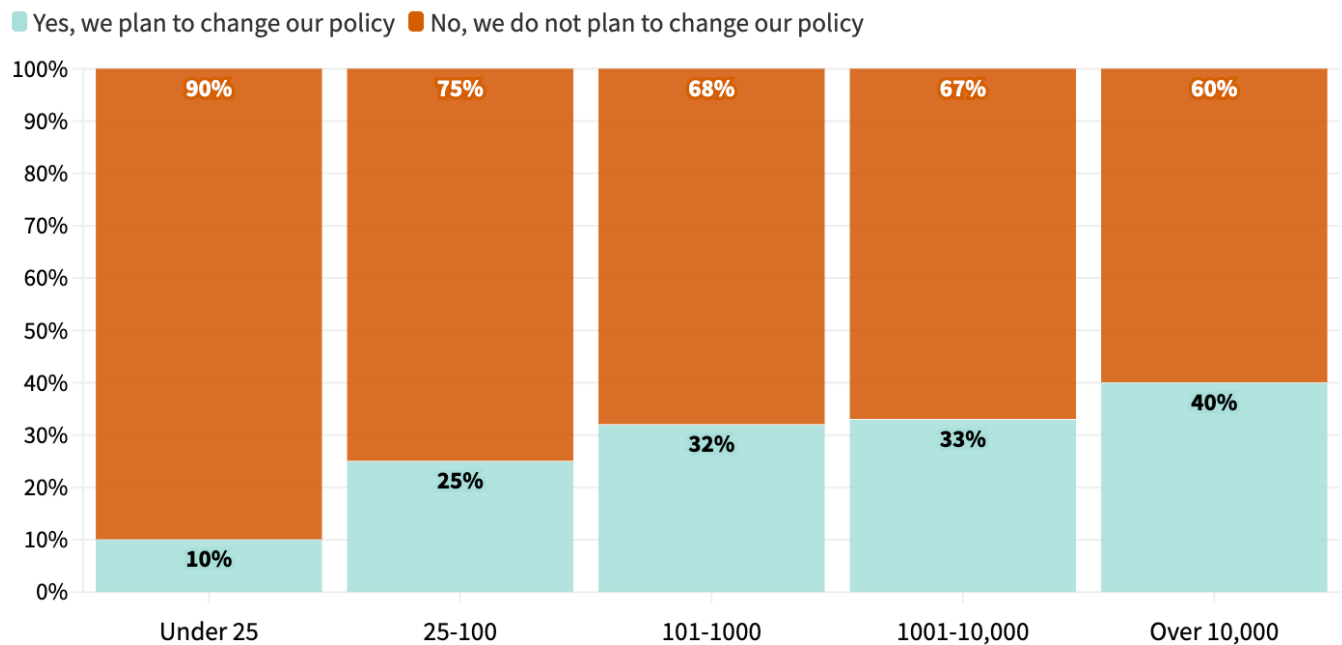


Source: Bay Area Return to Office Survey. **Analysis:** Bay Area Council Economic Institute. **Note:** This was a new question asked in February 2025.

Larger organizations, in particular, are taking a more proactive approach to increasing in-person attendance. Among respondents from companies with over 10,000 employees, 40% reported plans to modify their workplace attendance policies in the next six months, with the primary goal of increasing the frequency of in-person work (**Figure 13**). This response suggests a trend where larger employers are leading the push for more structured in-person expectations, which could influence regional commute patterns and public transit demand.

Figure 13. By company size, do you plan on changing your workplace attendance policy in the next six months or so to increase how often your employees are coming in?

This graph shows a crosstab of two questions, “In the past six months/next six months, have you changed/are planning to change your workplace attendance policy to increase how often your employees are coming in?” and “How many people does your organization employ in the Bay Area?”



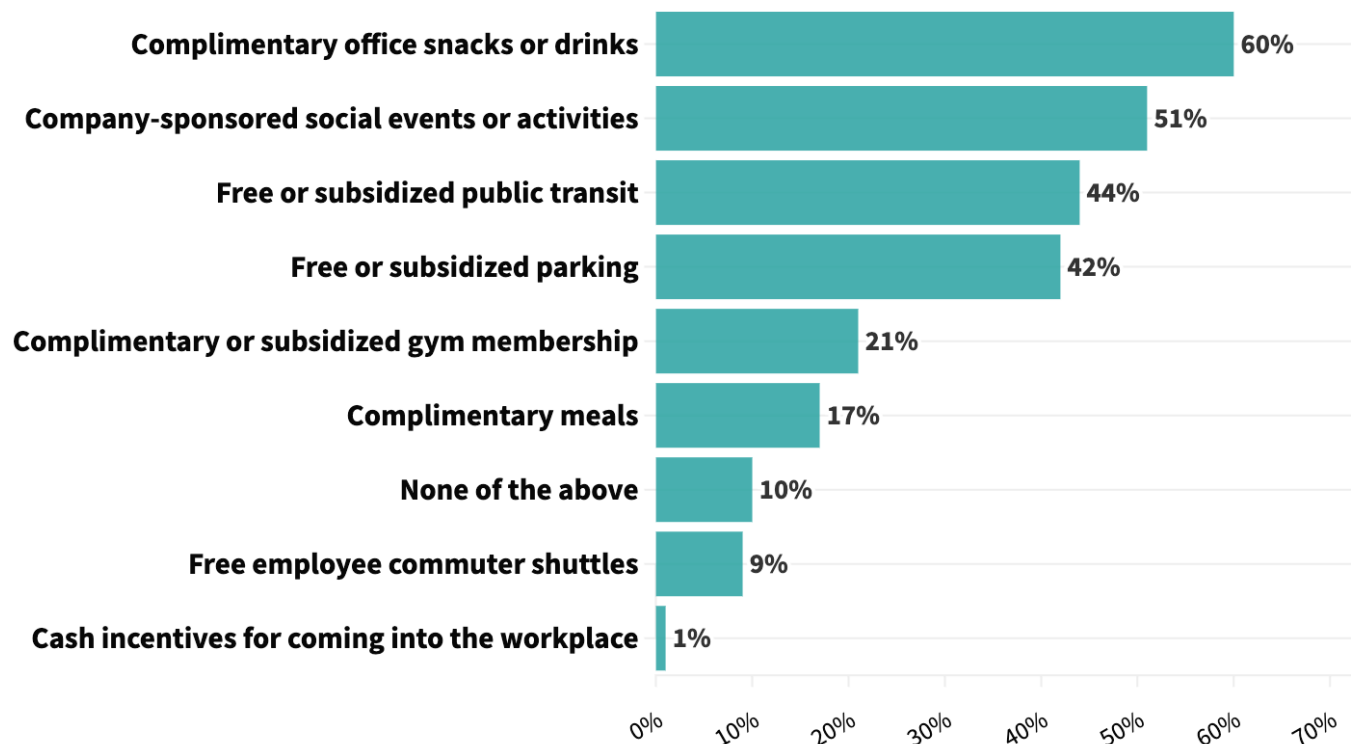
Source: Bay Area Return to Office Survey. **Analysis:** Bay Area Council Economic Institute. **Note:** This was a new question asked in February 2025.

B. Employer incentives

Hundreds of studies have been conducted across cities in the U.S. and abroad about how to revitalize downtowns, and [many point to incentives for office workers to return to the workplace](#). From September 2023 onward, the survey asked employers that do not require full in-person attendance from employees if they offered incentives to encourage employees to come into the workplace. Based on direct open comments from employers, the most common incentives or benefits found to encourage in-person work included: 1) complimentary office snacks or drinks (60%), 2) company-

sponsored social events or activities (51%), and 3) free or subsidized public transit (44%) (**Figure 14**). It is important to note that Bay Area businesses with 50 or more employees are required to offer commuter benefits through the Bay Area Commuter Benefits Program. The program, a partnership of MTC and the Bay Area Air Quality Management District, is mandatory, per Senate Bill 1128, located in California Government Code section 65081. In line with this requirement, many employers report providing transit subsidies. However, a nearly equal share (42%) also offer free or subsidized parking. Even when transit subsidies are available, workers may still choose to drive if parking is convenient and compensated, potentially undermining the intent of commuter programs to encourage more transit use.

Figure 14. Which of the following are available to your employees?



Source: Bay Area Return to Office Survey. **Analysis:** Bay Area Council Economic Institute. **Note:** Percentages exceed 100% because respondents could select multiple options. The data in this figure is from the February 2025 survey results.

Chapter 4: Impact on Public Transit

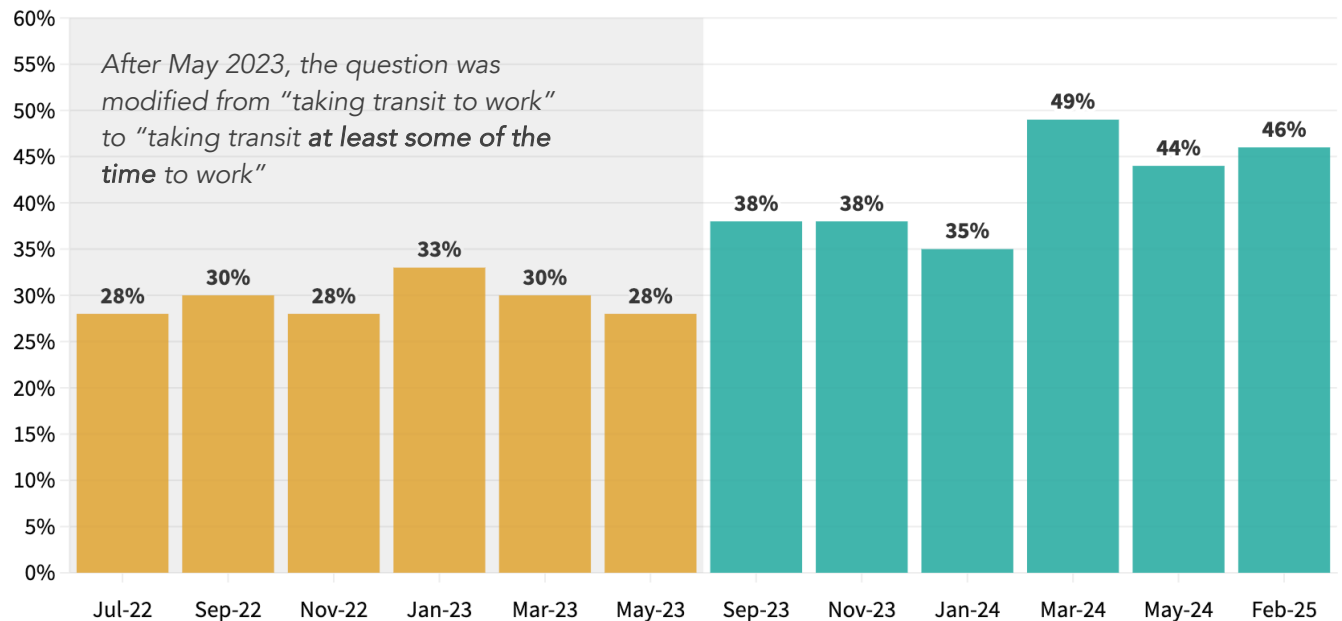
The shift from in-person to remote work has had far-reaching implications on the region's travel patterns. As fewer employees commute daily to workplaces, transit ridership has struggled to return to pre-pandemic levels – particularly on routes that serve downtown job centers – creating challenges for transit agencies and employers alike. At the same time, as more travelers choose to drive, traffic on local roads and congestion at Bay Area bridges has increased, with combined one-way toll crossings on the region's seven state-owned bridges nearing pre-pandemic levels (March 2025 is at 88.6% of March 2019 levels).

This chapter explores the impact of these commute and travel pattern changes on Bay Area public transit use. It begins by analyzing employer survey data on transit ridership trends, and then turns to the reasons why employees do not come into the office more often. The chapter then delves into the employer recommendations for improving public transit that could benefit their employees, such as focusing on strategies to enhance security, increase service frequency, and improve connectivity.

A. Trends in public transit use

Starting in July 2022 and ending in May 2023, employers were asked about the percentage of their employees that took transit pre-pandemic versus the percentage of their employees that take transit “now.” For those months, the pre-pandemic average was 45%, versus 30% in the “now” period, for a decrease of 15 percentage points. In September 2023, the survey was modified to only ask about current transit usage and broadened to ask about transit usage at least *some of the time*. From September 2023 to February 2025, employers said that on average 42% of their employees take public transit at least some of the time to get to work (**Figure 15**).

Figure 15. Thinking about your employees who come into the workplace, what is your best guess of the percentage that take public transit at least some of the time to get there?



Source: Bay Area Return to Office Survey. **Analysis:** Bay Area Council Economic Institute.

When employers were asked what factors were a reason employees do not go into the workplace more often, the most common responses were: 1) the amount of time it takes to commute to the workplace, 2) preference for working from home, and 3) the cost of commuting to the workplace (**Figure 16**). In February 2025, the largest share of respondents reported the amount of time it takes to commute to the workplace as a major or minor reason employees do not work in-person (93%). This was the first time since the survey was administered in April 2021 that long commute times were the primary reason reported for this question, though at least 86% of employers always listed it as a major or minor reason (**Figure 16 and 17**). The answer choices to this question did not distinguish between transit commute times and driving commute times; thus commute time as a deterrent to in-person work may be attributed to many non-transit related causes. The distance between work and home, traffic congestion for drivers, as well as traffic congestion for transit riders may all influence responses.

Concern about safety on public transit was typically cited as a minor reason, but the overall share of employers listing it as a reason (major or minor) declined slightly from 70% in September 2023 to 64% in the latest wave – possibly indicating improved perceptions of transit safety or a shift in focus toward other commuting barriers.

Figure 16. For each of the following factors, please indicate whether you think that is a major reason your employees do not come to the workplace more often.

The shares of those selecting “major reason” are below. “Minor reason”, “Not a reason at all” and “does not apply” are not included in the table.

% listed as major reason	23-Sep	23-Nov	24-Jan	24-Mar	24-May	25-Feb
The amount of time it takes to commute to the workplace	73%	66%	66%	72%	54%	73%
Preference for working at home	68%	67%	68%	74%	63%	71%
The cost of commuting to the workplace	30%	31%	29%	31%	24%	32%
Lack of convenient public transit to get to the workplace	22%	20%	16%	16%	22%	23%
Concerns about their safety on public transit	23%	24%	14%	17%	16%	19%
Concerns about their safety in the neighborhood where the workplace is located	10%	10%	11%	8%	14%	8%

Source: Bay Area Return to Office Survey. **Analysis:** Bay Area Council Economic Institute.

Figure 17. For each of the following factors, please indicate whether you think that is a minor reason your employees do not come to the workplace more often.

The shares of those selecting "minor reason" are below. "Major reason", "Not a reason at all" and "does not apply" are not included in the table.

% listed as minor reason	23-Sep	23-Nov	24-Jan	24-Mar	24-May	25-Feb
The cost of commuting to the workplace	49%	51%	46%	56%	56%	46%
Concerns about their safety on public transit	47%	41%	49%	51%	50%	45%
Lack of convenient public transit to get to the workplace	41%	44%	42%	46%	40%	43%
Concerns about their safety in the neighborhood where the workplace is located	29%	31%	24%	31%	34%	29%
The amount of time it takes to commute to the workplace	13%	24%	22%	23%	37%	20%
The cost of commuting to the workplace	49%	51%	46%	56%	56%	46%

Source: Bay Area Return to Office Survey. Analysis: Bay Area Council Economic Institute.

B. Employer recommendations for transit agencies

Most employers responded to an open-ended question asking them to offer specific recommendations to public transit agencies that could benefit their employees.

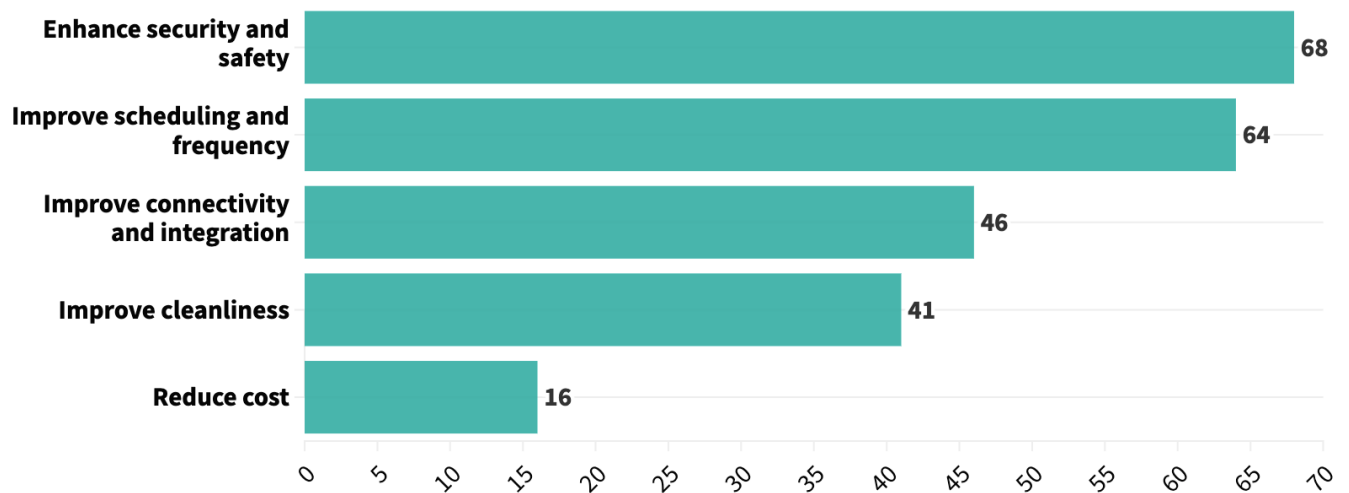
Answers provided both positive and negative feedback, and discussed a wide range of topics. These categories mark general shifts in the ways that public opinion around transit has changed as the Bay Area recovered from the pandemic. Five major themes stood out:

- 1) Safety and security
- 2) Scheduling and frequency
- 3) Connectivity and integration
- 4) Cleanliness
- 5) Cost

Across 157 responses in February 2025, recommendations to improve safety, scheduling, and connectivity were the most common responses (**Figure 18**). These recommendations are consistent with other survey waves as the most commonly mentioned items.

Figure 18. Thinking about what would be helpful for your employees, do you have any specific recommendations for Bay Area public transit agencies?

February 2025 survey, total number of open-ended responses that mentioned theme



Source: Bay Area Return to Office Survey. **Analysis:** Bay Area Council Economic Institute. **Note:** n=157 responses.

While the most common recommendations have remained relatively consistent throughout survey waves, the recommendations are not consistent with why employees do not go into the workplace. The amount of time it takes to commute to the workplace and preference for working from home have been the top reasons why employees do not work in-person across all waves of survey data, while neither of these categories have been prevalent in recommendations. It is reasonable to expect that employers would provide recommendations based on reasons why employees do not work in-person, but the answers to these questions in the survey data are not correlated. This discrepancy lies in the nature of the topics: employers are more likely to provide recommendations for actionable improvements that can be made by public

transit agencies. Many of the top reasons why employees do not work in-person, such as preference for working from home, are not within any transit agency's ability to address, and thus not common recommendations.

Chapter 5: Key Takeaways and Looking Ahead

The Return to Office survey, administered from April 2021 to February 2025, sought to inform the Bay Area's public policymakers and transit agencies of the region's employers' current and future work plans.

While it is difficult to make sweeping conclusions based on a limited subset of the Bay Area's employers, the results have shown a clear trend toward greater in-person attendance among survey respondents. Survey waves through the middle of 2023 showed average office attendance between 2 and 2.5 days per week for survey respondents. That number has since shifted to three days per week in the more recent survey waves. As of the February 2025 survey, the majority of employers say their employees are working in person three to five days per week, with core in-person days on Tuesdays, Wednesdays, and Thursdays.

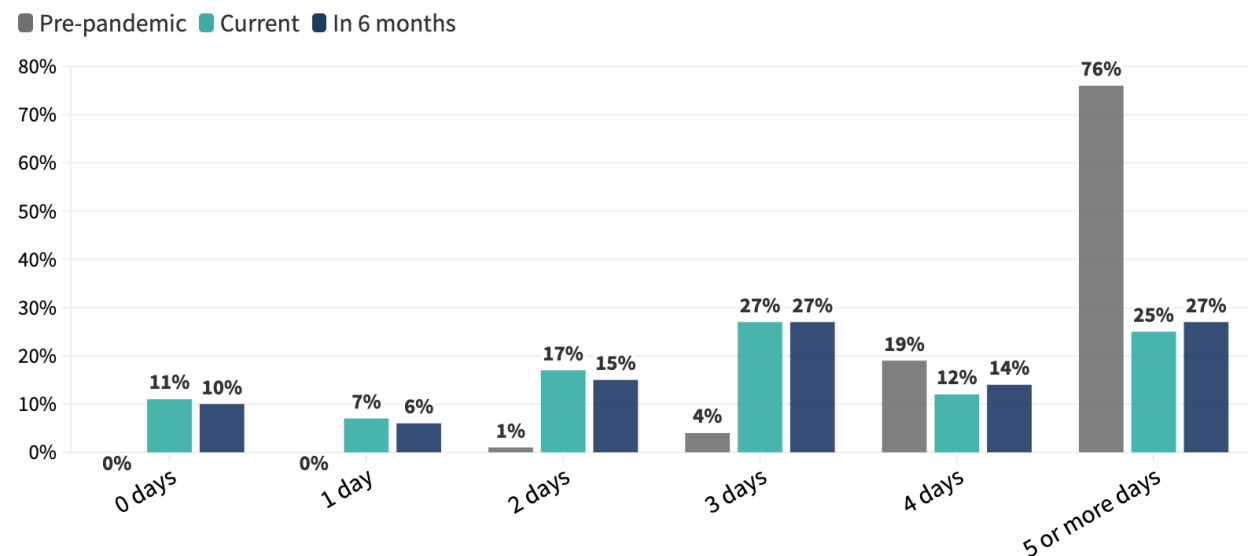
These results closely mirror the upward trajectory in ridership across the region's major transit agencies since the onset of the pandemic and the shift to remote work. The commute itself, however, appears to be the critical barrier for many employees that choose to work from home over a workplace. When asked why their employees do not go to the workplace more often, survey respondents overwhelmingly listed the amount of time it takes to commute (73%) and a preference for working from home (71%) as the major factors – both of which are largely outside the control of policymakers or transit agencies and are unlikely to change. With the time it takes to commute as a key barrier to office attendance, approximately two-thirds of survey respondents listed improved scheduling and frequency as a recommendation for public transit agencies. A similar two-thirds of respondents also listed security and safety improvements.

While the trend for office attendance has been upward – and there are reasons to believe that trend will continue – expectations for sharp upticks in office attendance should be relatively muted going forward even as workplace preferences continue to evolve. Some forward-looking takeaways from the February 2025 survey include:

- 16% of respondents said they had not yet implemented their long-term office attendance policy.
- A slightly higher 22% of respondents in the February 2025 survey plan to change their office attendance policy in the next six months by requiring attendance, changing the number of days, or making another policy change. This number is down from 36% that made a policy change in the six months prior to February 2025.
- Large employers are more likely to be planning an attendance policy change when compared to smaller employers.
- The vast majority of respondents believe that their office attendance policies are at least somewhat effective in driving the outcomes they desire.
- Bay Area employers believe that more of their employees will go into the workplace four to five days per week in the next six months, while the number of employees working zero to two days per week from the workplace will fall (Figure 19).

Figure 19. Pre-pandemic vs. right now vs. in six months, what is your best estimate of the frequency your Bay Area workforce comes/will come to the workplace each week?

Percentages are averaged across responses.



Source: Bay Area Return to Office Survey. **Analysis:** Bay Area Council Economic Institute. **Note:** Pre-pandemic estimates are based on responses from the September 2021 survey—the last time employers were asked about pre-pandemic work patterns. “Current” refers to data from the February 2025 survey, while “In 6 months” reflects employer predictions from the same February 2025 survey.

Looking Ahead

The COVID-19 pandemic changed how Bay Area residents live, work, and travel. It hit the public transit system hard, decimating transit ridership and, along with it, the transit fare revenue that many of the Bay Area’s transit agencies rely on to keep their buses, trains, and ferries in service.

While many workers, students, and neighbors who depend on transit ride regularly, others have returned to transit more slowly and less frequently. Today, the Bay Area still has one of the highest work-from-home rates in the nation, resulting in fewer commute trips. As of March 2025, current transit ridership has not recovered to pre-pandemic levels. Yet Bay Area transit ridership continues to trend upwardly, with many transit agencies seeing double-digit percentage gains in ridership in the first three months of 2025 compared with the same period in 2024.

Bay Area transit agencies and MTC are working to address the recommendations that employers had for transit agencies in the Return to Office survey. The Bay Area Transit Transformation Action Plan, adopted in 2021, identifies more than two dozen deliverables needed for a more connected, efficient, and customer-focused network that lets residents and visitors alike navigate the nine-county region with speed, safety, convenience, and confidence.

MTC and its transit agency partners are developing new fare tools to encourage more ridership, including piloting an all-agency transit pass known as the Clipper® BayPass. Later this year, with the launch of Next Generation Clipper®, MTC will pilot a new transfer policy that will give riders free or discounted transfers between systems. A single mapping and wayfinding system for use by all Bay Area transit agencies also is being tested to make traveling by transit clear, predictable, and familiar.

Ongoing investments in transit performance initiative projects are making transit faster and more reliable. Transit agencies are now syncing schedules in a whole new way with a focus on improving transfers between systems and making schedule changes at the same time twice each year, once in summer and once in winter. And BART is addressing concerns about rider security and safety by doubling BART Police presence on trains and in stations while installing new faregates systemwide to reduce fare evasion.

These efforts to make transit faster, safer, more connected, and more affordable are important pieces of the puzzle of encouraging more Bay Area residents and visitors to use transit, but there is no guarantee that these improvements will prompt more employees to return to the workplace. The many rounds of this survey show that the most effective way to compel in-office attendance is to have employers require it – 97% of survey respondents that require some in-office attendance say their policy is effective in driving the outcomes they want. With 68% of survey respondents already requiring attendance (and another 16% requesting it), there is some runway for additional policy and enforcement mechanisms to increase attendance. The clearest path forward for increasing in-person workplace attendance is for more companies to eventually increase the number of days that they expect employees to be there. The

hope is that policies such as these will result in more riders on the Bay Area's buses, trains, and ferries rather than more drivers on Bay Area streets, highways, and bridges.

Acknowledgements

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About BACEI

The Bay Area Council Economic Institute is housed at and supported by the Bay Area Council. Since 1990, the Institute has been the leading think tank focused on the economy of the San Francisco/Silicon Valley Bay Area. A forum for stakeholder engagement and a respected source of information and fact-based analysis, the Institute is a partner and adviser to both business leaders and government officials, universities, and overseas partners.

About MTC

The Metropolitan Transportation Commission (MTC) was created by the California Legislature in 1970 to plan, finance and coordinate the San Francisco Bay Area's transportation system. The Commission's scope over the years has expanded to address other regional issues, including housing and development.

About EMC

EMC Research is a national public opinion research and strategic consulting firm specializing in survey research, focus groups, and data analysis. Since 1989, EMC has delivered innovative, data-driven insights across public and private sectors, helping clients make informed, strategic decisions.

Appendix

The **Return to Office** survey, formerly known as the **Return to Transit** survey, was conducted 27 times over a four-year period. The appendix that follows includes detailed data tables followed by full survey questionnaires from each iteration.

Each wave was released as an interactive graphic story. To explore the latest survey results and view past editions, visit: <https://www.bayareacouncil.org/employer-survey-results/>

Appendix data tables

Table A. Survey Respondents by Month and Associated Wave

Month	Wave	n
21-Apr	Wave 1	59
21-May	Wave 2	251
21-Jun	Wave 3	253
21-Jul	Wave 4	205
21-Aug	Wave 5	197
21-Sep	Wave 6	128
21-Oct	Wave 7	242
21-Nov	Wave 8	189
21-Dec	Wave 9	189
22-Jan	Wave 10	176
22-Feb	Wave 11	156
22-Mar	Wave 12	144
22-Apr	Wave 13	181
22-May	Wave 14	124
22-Jun	Wave 15	110
22-Jul	Wave 16	131
DATA COLLECTION SWITCHED TO EVERY OTHER MONTH		
22-Sep	Wave 17	82
22-Nov	Wave 18	167
23-Jan	Wave 19	216
23-Mar	Wave 20	161
23-May	Wave 21	193
3-MONTH HIATUS AS SURVEY QUESTIONS WERE REVISED		
23-Sep	Wave 22	166
23-Nov	Wave 23	182
24-Jan	Wave 24	196
24-Mar	Wave 25	140
24-May	Wave 26	138
8 MONTH HIATUS		
25-Feb	Wave 27	236

Table B. Which industry sector is your organization most closely associated with?

Survey Wave	Finance	Information	Education and Health	Construction	Trade/Transportation/Utilities	Professional	Leisure and Hospitality	Manufacturing	Nonprofit/Foundation/Philanthropic*	Government	Personal Services	Other (please specify)
21-May	7%	4%	15%	10%	8%	23%	2%	2%		11%	1%	16%
21-Jun	9%	4%	13%	7%	10%	20%	4%	8%		11%	0%	15%
21-Jul	5%	5%	17%	10%	11%	21%	5%	3%		8%	1%	14%
21-Aug	8%	3%	9%	7%	7%	18%	16%	3%		11%	1%	17%
21-Sep	10%	4%	11%	10%	6%	23%	6%	2%		9%	0%	20%
21-Oct	7%	4%	10%	7%	7%	22%	5%	3%	9%	12%	2%	12%
21-Nov	6%	3%	11%	12%	6%	20%	4%	2%	11%	11%	1%	14%
21-Dec	7%	3%	7%	8%	6%	24%	7%	3%	10%	11%	2%	12%
22-Jan	8%	3%	10%	7%	7%	22%	7%	3%	8%	11%	1%	13%
22-Feb	8%	2%	10%	9%	8%	24%	4%	2%	6%	12%	2%	13%
22-Mar	10%	4%	10%	10%	4%	19%	4%	3%	10%	10%	0%	13%
22-Apr	11%	6%	10%	9%	4%	22%	3%	4%	7%	12%	1%	12%
22-May	5%	3%	9%	7%	6%	29%	3%	4%	7%	14%	1%	12%
22-Jun	8%	5%	7%	7%	2%	28%	5%	5%	11%	11%	0%	12%
22-Jul	7%	3%	9%	7%	4%	25%	3%	5%	12%	15%	2%	9%
22-Sep	13%	2%	6%	6%	4%	30%	4%	0%	9%	12%	2%	11%
22-Nov	8%	3%	6%	7%	6%	22%	4%	4%	11%	14%	2%	13%
23-Jan	8%	5%	6%	10%	4%	23%	2%	2%	16%	10%	0%	13%
23-Mar	9%	3%	7%	9%	5%	19%	2%	2%	16%	12%	2%	14%
23-May	8%	5%	8%	6%	6%	22%	1%	3%	11%	12%	2%	17%
23-Sep	9%	3%	7%	5%	2%	22%	2%	4%	17%	14%	1%	13%
23-Nov	10%	5%	8%	5%	6%	21%	2%	0%	11%	14%	2%	15%
24-Jan	6%	3%	10%	5%	7%	22%	3%	2%	16%	12%	1%	14%
24-Mar	7%	3%	9%	5%	2%	31%	1%	1%	11%	13%	1%	16%
24-May	8%	7%	12%	4%	7%	22%	7%	3%	8%	12%	1%	9%
25-Feb	9%	8%	7%	5%	5%	23%	2%	2%	17%	15%	1%	7%
AVERAGE	8%	4%	10%	8%	6%	23%	4%	3%	9%	12%	1%	13%

*Note: Nonprofit was added as a category in October 2021. Question was not included in April 2021 survey.

Table C. Which industry sector is your organization most closely associated with?

New detailed industry categories introduced in February 2025

Industry	25-Feb
Architecture and Design	5%
Biotech/Life Sciences/R&D	2%
Construction	4%
Education	7%
Finance and Insurance	7%
Government	14%
Health Care	4%
Legal and Accounting	5%
Leisure and Hospitality	2%
Manufacturing	1%
Media	2%
Nonprofit/Foundation/Philanthropic	16%
Personal Services	1%
Real Estate	8%
Technology	8%
Trade, Transportation, or Utilities	6%
Other	6%

Table D. In which Bay Area county/counties is your organization located? (Select all that apply)

	Alameda	Contra Costa	Marin	Napa	San Francisco	San Mateo	Santa Clara	Solano	Sonoma
21-May	31%	14%	8%	5%	59%	16%	21%	4%	8%
21-Jun	39%	17%	11%	5%	47%	16%	22%	7%	11%
21-Jul	28%	20%	10%	7%	59%	16%	29%	7%	11%
21-Aug	32%	16%	9%	6%	60%	17%	19%	6%	7%
21-Sep	35%	17%	12%	8%	61%	24%	26%	13%	7%
21-Oct	28%	15%	6%	5%	54%	17%	22%	5%	5%
21-Nov	32%	15%	8%	5%	52%	16%	22%	5%	10%
21-Dec	35%	22%	11%	5%	57%	14%	24%	3%	6%
22-Jan	32%	19%	10%	5%	56%	19%	27%	6%	6%
22-Feb	28%	18%	8%	6%	61%	20%	23%	6%	6%
22-Mar	35%	24%	11%	6%	58%	21%	26%	5%	6%
22-Apr	34%	20%	9%	4%	57%	18%	27%	4%	9%
22-May	27%	15%	5%	2%	60%	18%	26%	2%	3%
22-Jun	28%	15%	6%	5%	63%	18%	19%	2%	1%
22-Jul	31%	25%	8%	7%	42%	16%	19%	6%	5%
22-Sep	33%	25%	7%	6%	67%	20%	28%	5%	7%
22-Nov	26%	10%	2%	2%	36%	9%	11%	3%	2%
23-Jan	34%	19%	7%	4%	56%	19%	20%	5%	6%
23-Mar	36%	15%	11%	8%	51%	24%	25%	6%	6%
23-May	37%	16%	9%	5%	58%	17%	23%	5%	5%
23-Sep	24%	19%	7%	4%	49%	10%	19%	3%	7%
23-Nov	32%	13%	5%	3%	54%	22%	19%	3%	4%
24-Jan	33%	19%	4%	2%	44%	13%	19%	4%	5%
24-Mar	26%	15%	11%	6%	60%	16%	21%	5%	8%
24-May	30%	13%	3%	5%	41%	14%	14%	4%	7%
25-Feb	33%	17%	8%	4%	60%	16%	19%	4%	3%
AVERAGE	32%	17%	8%	5%	54%	17%	22%	5%	6%

Table E. How many offices or work locations does your organization have in the Bay Area that employees can visit or work in?

	None, we are a fully remote organization	One	Two to four	Five or more
24-May	5%	49%	36%	10%
24-Mar	7%	45%	36%	11%
24-Jan	7%	46%	33%	14%
23-Nov	7%	37%	34%	22%
23-Sep	9%	53%	28%	10%
25-Feb	9%	45%	32%	15%
AVERAGE	7%	46%	33%	14%

Table F. How many people does your organization employ in the Bay Area?

	Under 25	25-100	101-1,000	1,001-10,000	Over 10,000
21-Apr	15%	15%	30%	19%	21%
21-May	26%	23%	27%	17%	7%
21-Jun	18%	20%	31%	23%	8%
21-Jul	18%	21%	32%	21%	8%
21-Aug	30%	22%	23%	16%	8%
21-Sep	23%	28%	25%	17%	7%
21-Oct	23%	22%	30%	18%	7%
21-Nov	24%	23%	29%	16%	8%
21-Dec	21%	26%	31%	18%	5%
22-Jan	24%	23%	28%	19%	6%
22-Feb	24%	24%	26%	19%	8%
22-Mar	19%	24%	33%	18%	6%
22-Apr	16%	24%	34%	19%	7%
22-May	19%	25%	34%	20%	2%
22-Jun	29%	25%	19%	19%	8%
22-Jul	29%	22%	23%	18%	8%
22-Sep	18%	23%	32%	20%	7%
22-Nov	22%	28%	28%	19%	4%
23-Jan	26%	29%	27%	14%	4%
23-Mar	24%	27%	26%	16%	7%
23-May	26%	28%	26%	12%	7%
23-Sep	32%	29%	24%	14%	2%
23-Nov	21%	29%	31%	12%	7%
24-Jan	30%	27%	27%	11%	5%
24-Mar	29%	30%	28%	10%	4%
24-May	27%	38%	23%	7%	5%

Table G. What is your best estimate of the frequency your Bay Area workforce comes to the workplace each week?

	0 days	1 day	2 days	3 days	4 days	5 or more days
21-Oct	32%	9%	12%	16%	7%	25%
21-Nov	27%	8%	13%	18%	9%	25%
21-Dec	28%	10%	11%	18%	10%	23%
22-Jan	37%	9%	12%	14%	7%	22%
22-Feb	30%	8%	13%	17%	10%	23%
22-Mar	28%	7%	13%	20%	10%	22%
22-Apr	20%	22%	19%	11%	8%	20%
22-May	16%	14%	16%	20%	10%	22%
22-Jun	23%	12%	18%	17%	12%	18%
22-Jul	23%	8%	16%	21%	8%	25%
22-Sep	25%	11%	15%	22%	9%	17%
22-Nov	23%	9%	15%	22%	8%	23%
23-Jan	24%	9%	17%	19%	11%	20%
23-Mar	21%	9%	17%	23%	11%	19%
23-May	23%	9%	15%	22%	8%	23%
23-Sep	12%	10%	15%	25%	10%	27%
23-Nov	11%	7%	17%	26%	13%	26%
24-Jan	12%	8%	17%	26%	12%	25%
24-Mar	12%	9%	20%	32%	11%	15%
24-May	9%	7%	15%	24%	18%	27%
25-Feb	11%	7%	17%	27%	12%	25%

Table H. In six months, what are your best estimates at the days of the week that your Bay Area workforce comes/will come to the workplace each week?

Date	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday/Sunday
22-Jul	35%	45%	48%	45%	27%	
22-Sep	33%	50%	50%	49%	25%	
22-Nov	36%	57%	59%	54%	29%	
23-Jan	37%	56%	54%	53%	27%	
23-Mar	38%	55%	57%	53%	28%	
23-May	36%	57%	59%	54%	29%	
23-Sep	46%	63%	62%	63%	35%	6%
23-Nov	43%	63%	61%	61%	33%	9%
24-Jan	41%	60%	60%	60%	30%	7%
24-Mar	36%	57%	52%	52%	22%	5%
24-May	45%	63%	59%	59%	36%	10%
25-Feb	42%	63%	65%	63%	33%	9%

Note: Saturday/Sunday was added as an option in September 2023.

Table I. As the Bay Area recovers from the COVID-19 pandemic, when do you expect to fully implement your company, long-term policy for in-person and remote work?

	We have already fully implemented our long-term policy	Within 2 months	3-6 months	7-11 months	At least one year	We do not plan on bringing employees back to the workplace*
21-Apr	0%	8%	57%	21%	14%	0%
21-May	4%	10%	49%	31%	5%	1%
21-Jun	5%	10%	57%	18%	8%	2%
21-Jul	5%	26%	42%	19%	7%	1%
21-Aug	7%	17%	48%	15%	12%	2%
21-Sep	13%	8%	53%	10%	15%	1%
21-Oct	29%	7%	45%	8%	8%	4%
21-Nov	33%	16%	37%	7%	7%	2%
21-Dec	32%	18%	33%	5%	8%	4%
22-Jan	25%	15%	39%	10%	10%	2%
22-Feb	28%	25%	29%	9%	8%	2%
22-Mar	35%	30%	24%	3%	6%	2%
22-Apr	50%	17%	24%	5%	3%	1%
22-May	52%	6%	33%	2%	7%	0%
22-Jun	55%	7%	22%	4%	7%	5%
22-Jul	56%	7%	18%	3%	10%	5%
22-Sep	56%	11%	17%	1%	10%	5%
22-Nov	65%	8%	13%	2%	7%	5%
23-Jan	69%	9%	10%	1%	7%	5%
23-Mar	73%	7%	6%	3%	5%	6%
23-May	77%	2%	9%	2%	7%	3%
23-Sep	86%	4%	5%	1%	5%	
23-Nov	88%	3%	4%	1%	5%	
24-Jan	85%	4%	4%	0.5%	7%	
24-Mar	89%	2%	3%	2%	4%	
24-May	70%	20%	6%	1%	2%	
25-Feb	84%	5%	7%	1%	3%	

Full Survey Questionnaires

1. May 2021- September 2021

Bay Area Council Employer Network – Return to Transit Tracking Poll

The following survey is intended to gather information on Bay Area employers' return to work plans to assist transit agencies in planning for the future. All information collected is anonymous. When answering each question, please make your best guess or estimate, selecting the answer that is most applicable to you. This survey should take less than 5 minutes to complete.

QA. In which Bay Area county/counties is your organization located? (Select all that apply)

1. Alameda
2. Contra Costa
3. Marin
4. Napa
5. San Francisco
6. San Mateo
7. Santa Clara
8. Solano
9. Sonoma

QB. Which industry sector is your organization most closely associated with?

1. Construction
2. Manufacturing
3. Professional
4. Information
5. Education and Health
6. Leisure and Hospitality
7. Government
8. Finance
9. Trade, Transportation, or Utilities
10. Personal Services
11. Other (open text box)

1) How many people does your organization employ in the Bay Area?

- a. Under 25
- b. 25-100
- c. 101-1000
- d. 1001-10,000
- e. Over 10,000

2) How many of your Bay Area employees are considered essential workers?

- a. None
- b. Less than a quarter
- c. Around half
- d. Close to three-quarters
- e. All

3) **Before the pandemic**, how many days per week did your **typical** employee come to the workplace?

- a. 5 or more
- b. 4
- c. 3
- d. 2
- e. 1
- f. 0

4) **Right now**, how many days per week does your **typical** employee come to the workplace?

- a. 5 or more
- b. 4
- c. 3
- d. 2
- e. 1
- f. 0

5) Once the pandemic is behind us, how many days per week do you expect your **typical** employee will come to the workplace?

- a. 5 or more
- b. 4
- c. 3
- d. 2
- e. 1
- f. 0

6) How confident are you on your answer to the above question?

Use numeric scale 1-5 (1 = Not confident at all 3 = Somewhat confident 5 = Very confident)

(SKIP to Q12 if Q2 = All are essential or 0% of workers are remote OR if Q3=0 and Q5=0)

7) Which of the following best describes where you are in **planning** how your employees will return to the workplace? (i.e., phased return, reduced capacity at the workplace, limited days per week)?

- a. We have not started planning
- b. We are in the very early planning stages
- c. We have developed some return plans, and still have more to develop
- d. We have developed most of our return plans
- e. We have developed all our return plans
- f. We do not plan on bringing employees back to the workplace

8) And which best describes where you are on **enacting** your plans to bring your non-essential employees back to the workplace??

- a. We have not started bringing any non-essential employees back to the workplace
- b. We have allowed a few non-essential employees to start coming to the workplace
- c. We are more than halfway done bringing non-essential employees back to the workplace
- d. We have completed bringing non-essential employees back to the workplace
- e. We do not plan on bringing non-essential employees back to the workplace

9) And what is your best guess at when you will start bringing non-essential employees back to the workplace?

- a. We have already begun bringing non-essential employees back to the workplace
- b. Within one month
- c. 1-2 months (June – July)
- d. 3-4 months (August – September)
- e. 5-6 months (October – November)
- f. 7-11 months (December 2021 – April 2022)
- g. At least one year (May 2022 or later)
- h. We do not plan on bringing non-essential employees back to the workplace

10) From today, when do you think your new long-term “normal” will be fully implemented in your organization? (i.e., all employees who you would like to return to the workplace have returned with consistency)

- a. N/A/we are already operating under our new normal
- b. Within one month
- c. 1-2 months (June-July)
- d. 3-4 months (August – September)
- e. 5-6 months (October – November)
- f. 7-11 months (December 2021 – April 2022)
- g. At least one year (May 2022 or later)
- h. We do not plan on bringing employees back to the workplace

11) How much are you communicating with your employees about how they get to work/will get to work (i.e., by driving alone, utilizing public transit, etc.) once the workplace reopens?

- a. A lot
- b. A little
- c. Not at all

12) Thinking about your employees returning to public transit, as of right now, how concerned are you about COVID safety on transit?

- d. Very concerned
- e. Somewhat concerned
- f. Not very concerned
- g. Not at all concerned

13) Will you support the use of public transit as a way for your employees to commute to the workplace? If no, why?

Yes

No

Comment box generated for "no" responses

14) Do you have any specific recommendations related to public transit in the Bay Area that would be helpful for your employees? **Open comment box**

QC. Please include your contact information here to receive future communications from the BAC Employer Network, including future iterations of this survey and the survey results. **Note: Your information will not be linked to your response, and information shared will only be used for communication purposes for this project.*

Name:

Organization:

Email Address:

2. October 2021 – June 2022

Bay Area Council Employer Network – Return to Transit Tracking Poll

The following survey is intended to gather information on Bay Area employers' return to work plans to assist transit agencies in planning for the future. All information collected is anonymous. When answering each question, please make your best guess or estimate, selecting the answer that is most applicable to you. This survey should take less than 5 minutes to complete.

QA. In which Bay Area county/counties is your organization located? (Select all that apply)

- 10. Alameda
- 11. Contra Costa
- 12. Marin
- 13. Napa
- 14. San Francisco
- 15. San Mateo
- 16. Santa Clara
- 17. Solano
- 18. Sonoma

QB. Which industry sector is your organization most closely associated with?

- 12. Construction
- 13. Manufacturing
- 14. Professional
- 15. Information
- 16. Education and Health
- 17. Leisure and Hospitality
- 18. Government
- 19. Finance
- 20. Trade, Transportation, or Utilities
- 21. Personal Services
- 22. Nonprofit/Foundation/Philanthropic
- 23. Other (open text box)

1) How many people does your organization employ in the Bay Area?

- a. Under 25
- b. 25-100
- c. 101-1000
- d. 1001-10,000
- e. Over 10,000

2) How many of your Bay Area employees are considered essential workers?

- a. None
- b. Less than a quarter
- c. Around half
- d. Close to three-quarters
- e. All

3) **Right now**, what is your best guess at the frequency your Bay Area workforce comes to the workplace each week? (Percentages must add up to 100%)

- a. 0 Days a week: ____%
- b. 1 Day a week: ____%
- c. 2 Days a week: ____%
- d. 3 Days a week: ____%
- e. 4 Days a week: ____%
- f. 5 or more Days a week: ____%

4) **Once the pandemic is behind us**, how many days per week do you expect your **typical** employee will come to the workplace?

- a. 5 or more
- b. 4
- c. 3
- d. 2
- e. 1
- f. 0

5) **Once the pandemic is behind us**, what is your best guess at the percent of your workforce that will come to the workplace each weekday?

- a. Monday (Include sliding scale from 0-100 for each day)
- b. Tuesday

- c. Wednesday
- d. Thursday
- e. Friday

6) How confident are you on your answer to the above question?

Use numeric scale 1-5 (1 = Not confident at all 3 = Somewhat confident 5 = Very confident)

(SKIP to Q11 if Q2 = All are essential or 0% of workers are remote OR if Q4=0)

7) Do you expect that your employees will come to the workplace for traditional ~9-5 hours post-pandemic?

- a. Yes, we anticipate that our employees will come to the workplace for traditional work hours
- b. No, we anticipate that our employees will come to the workplace for flexible/variable hours

8) Is there other information you feel we should know about the timing and frequency with which you anticipate your employees coming back to the workplace?

Open comment box

9) What is your best guess at when you will start bringing non-essential employees back to the workplace?

- a. We have already begun bringing non-essential employees back to the workplace
- b. Within one month
- c. 1-2 months
- d. 3-4 months
- e. 5-6 months
- f. 7-11 months
- g. At least one year
- h. We do not plan on bringing non-essential employees back to the workplace

10) From today, when do you think your new long-term "normal" will be fully implemented in your organization? (i.e., all employees who you would like to return to the workplace have returned with consistency)

- a. N/A/we are already operating under our new normal
- b. Within one month

- c. 1-2 months
- d. 3-4 months
- e. 5-6 months
- f. 7-11 months
- g. At least one year
- h. We do not plan on bringing employees back to the workplace

11) How much are you communicating with your employees about how they get to work/will get to work (i.e., by driving alone, utilizing public transit, etc.) once the workplace reopens?

- a. A lot
- b. A little
- c. Not at all

12) Thinking about your employees returning to public transit, as of right now, how concerned are you about COVID safety on transit?

- a. Very concerned
- b. Somewhat concerned
- c. Not very concerned
- d. Not at all concerned

13) Will you support the use of public transit as a way for your employees to commute to the workplace? If no, why?

Yes

No

Comment box generated for "no" responses

14) Thinking about what would be helpful for your employees, do you have any specific recommendations for Bay Area public transit agencies?

Open comment box

QC. Please include your contact information here to receive future communications from the BAC Employer Network, including future iterations of this survey and the survey results. **Note: Your information will not be linked to your response, and information shared will only be used for communication purposes for this project.*

Name:

Organization:

Email Address:

3. July 2022 – May 2023

Bay Area Council Employer Network – Return to Transit Tracking Poll

The following survey is intended to gather information on Bay Area employers' return to work plans to assist transit agencies in planning for the future. All information collected is anonymous. When answering each question, please make your best guess or estimate, selecting the answer that is most applicable to you. This survey should take less than 5 minutes to complete.

1. In which Bay Area county/counties is your organization located? (Select all that apply)

1. Alameda
2. Contra Costa
3. Marin
4. Napa
5. San Francisco
6. San Mateo
7. Santa Clara
8. Solano
9. Sonoma

2. Which industry sector is your organization most closely associated with?

1. Construction
2. Manufacturing
3. Professional
4. Information
5. Education and Health
6. Leisure and Hospitality
7. Government
8. Finance
9. Trade, Transportation, or Utilities
10. Personal Services
11. Nonprofit/Foundation/Philanthropic
12. Other (open text box)

3. How many people does your organization employ in the Bay Area?
 13. Under 25
 14. 25-100
 15. 101-1000
 16. 1001-10,000
 17. Over 10,000
4. What is your best guess at when you will start bringing non-essential employees back to the workplace?
 1. We have already begun bringing non-essential employees back to the workplace
 2. Within one month
 3. 1-2 months
 4. 3-4 months
 5. 5-6 months
 6. 7-11 months
 7. At least one year
 8. We do not plan on bringing non-essential employees back to the workplace
5. From today, when do you think your new long-term “normal” will be fully implemented in your organization? (i.e., all employees who you would like to return to the workplace have returned with consistency)
 1. N/A/we are already operating under our new normal
 2. Within one month
 3. 1-2 months
 4. 3-4 months
 5. 5-6 months
 6. 7-11 months
 7. At least one year
 8. We do not plan on bringing employees back to the workplace

6. **Right now, and in six months**, what are your best estimates at the frequency your Bay Area workforce comes/will come to the workplace each week? (Percentages must add up to 100%; Please attempt to make your best guess)

	Right Now	In 6 months
a. Percentage of Bay Area workforce coming in 0 Days a week:	%	%
b. Percentage of Bay Area workforce coming in 1 Day a week:	%	%
c. Percentage of Bay Area workforce coming in 2 Days a week:	%	%
d. Percentage of Bay Area workforce coming in 3 Days a week:	%	%
e. Percentage of Bay Area workforce coming in 4 Days a week:	%	%
f. Percentage of Bay Area workforce coming in 5 Days a week:	%	%

7. In six months, what is your best estimate at the **days of the week** that your Bay Area workforce will come to the workplace each week?

	In 6 months
a. Percentage of Bay Area workforce coming in on Mondays	%
b. Percentage of Bay Area workforce coming in on Tuesdays	%
c. Percentage of Bay Area workforce coming in on Wednesdays	%
d. Percentage of Bay Area workforce coming in on Thursdays	%
e. Percentage of Bay Area workforce coming in on Fridays	%

8. What is your best guess at the percent of your Bay Area workforce that will be fully remote post-pandemic? (Include sliding scale from 0-100)

9. Has your company made any changes in its office space in the Bay Area due to the pandemic and remote work? Check all that apply

1. We have not made any changes (Exclusive response)
2. We **have reduced** our total office space in the Bay Area
3. We **are planning to reduce** our total office space in the future, but have not done so yet
4. We **have increased** our total office space in the Bay Area
5. We **are planning to increase** our total office space in the future, but have not done so yet
6. We have reduced our main office, and distributed our offices throughout the Bay Area to be closer to where employees live
7. We have consolidated into one or a few main offices
8. We have reduced our **urban** office space
9. We have reduced our **suburban** office space
10. We have **reduced** our commuter transportation programs and benefits

11. We have **increased** our commuter transportation programs and benefits
10. Is there other information you feel we should know about how you have changed your workplace or offices?
Open comment box
11. What is your best guess of what percentage of your company's Bay Area employees took transit to work before the pandemic? (Include sliding scale from 0-100)
12. What is your best guess of what percentage of your company's Bay Area employees currently take transit when they come to the workplace? (Include sliding scale from 0-100)
13. Thinking about your employees returning to public transit, as of right now, how concerned is your organization about their non-COVID related safety on transit?
1. Very concerned
 2. Somewhat concerned
 3. Not very concerned
 4. Not at all concerned
14. Which of the following best describes your organization's approach to public transit for your employees as they return to the workplace? (Please select the answer choice that most closely corresponds with your organization's approach)
1. We are actively encouraging our employees to take transit to work, including providing employee transit benefits
 2. We are not currently actively encouraging our employees to take transit to work, but we are still providing employee transit benefits
 3. We are fine if employees take transit to work, but we don't have any specific programs to support it
 4. We are asking employees not to take transit to work for now, to limit potential Covid exposure
 - *[Open comment box generated if this response is selected: "What needs to happen for you to be comfortable with your employees riding transit to work?"]*
15. Thinking about what would be helpful for your employees, do you have any specific recommendations for Bay Area public transit agencies?

Open comment box

QC. Please include your contact information here to receive future communications from the BAC Employer Network, including future iterations of this survey and the survey results. **Note: Your information will not be linked to your response, and information shared will only be used for communication purposes for this project.*

Name:

Organization:

Email Address:

4. September 2023 – May 2024

Bay Area Return to Office Survey:

The following survey is intended to gather information on Bay Area employers' return to office plans to assist transit agencies in planning for the future. All information collected is anonymous. When answering each question, please make your best guess or estimate, selecting the answer that is most applicable to you. This survey should take less than 5 minutes to complete.

16. In which Bay Area county/counties is your organization located? (Select all that apply)

1. Alameda
2. Contra Costa
3. Marin
4. Napa
5. San Francisco
6. San Mateo
7. Santa Clara
8. Solano
9. Sonoma

17. Which industry sector is your organization most closely associated with?

10. Construction
11. Manufacturing
12. Professional
13. Information
14. Education and Health
15. Leisure and Hospitality
16. Government
17. Finance
18. Trade, Transportation, or Utilities
19. Personal Services
20. Nonprofit/Foundation/Philanthropic
21. Other (open text box)

18. How many people does your organization employ in the Bay Area?

- 22. Under 25
- 23. 25-100
- 24. 101-1000
- 25. 1001-10,000
- 26. Over 10,000

19. As the Bay Area recovers from the COVID-19 pandemic, when do you expect to fully implement your company's long-term policy for in-person and remote work?

- 1. We have already fully implemented our long-term policy
- 2. Within the next month
- 3. 1-2 months
- 4. 3-4 months
- 5. 5-6 months
- 6. 7-11 months
- 7. At least one year

20. How many offices or work locations does your organization have in the Bay Area that employees can visit or work in?

- 1. None – we are a fully remote organization → **SKIP TO THANK YOU AND END**
- 2. One
- 3. Two to Four
- 4. Five or More

21. **Right now, and in six months**, what are your best estimates at the frequency your Bay Area workforce comes/will come to the workplace each week? (Percentages must add up to 100%; Please attempt to make your best guess)

	Right Now	In 6 months
g. Percentage of Bay Area workforce coming in 0 Days a week:	%	%
h. Percentage of Bay Area workforce coming in 1 Day a week:	%	%
i. Percentage of Bay Area workforce coming in 2 Days a week:	%	%
j. Percentage of Bay Area workforce coming in 3 Days a week:	%	%
k. Percentage of Bay Area workforce coming in 4 Days a week:	%	%
l. Percentage of Bay Area workforce coming in 5 Days a week:	%	%

22. In six months, what is your best estimate at the **days of the week** that your Bay Area workforce will come to the workplace each week?

In 6 months

- | | |
|---|---|
| f. Percentage of Bay Area workforce coming in on Mondays | % |
| g. Percentage of Bay Area workforce coming in on Tuesdays | % |
| h. Percentage of Bay Area workforce coming in on Wednesdays | % |
| i. Percentage of Bay Area workforce coming in on Thursdays | % |
| j. Percentage of Bay Area workforce coming in on Fridays | % |
| k. Percentage of Bay Area workforce coming in on Saturdays or Sundays | |

23. Do you currently...

1. **Require** some or all employees to visit or work in the workplace a certain number of days each month or week
2. **Request** some or all employees to visit or work in the workplace a certain number of days each month or week, but not require it
3. Not have specific expectations for employees to visit or work in the workplace a certain number of days each week or month
4. Something else (please describe)

24. Does your organization track employee workplace visits?

1. Yes, with electronic badges or other formal systems
2. Yes, but informally
3. No, we do not track employee workplace visits

25. Please describe any specific policies, guidelines, practices, or incentives your organization uses to encourage employees to come in to the workplace. **(OPEN ENDED QUESTION, TEXT BOX)**

26INT. For each of the following factors, please indicate whether you think that is a reason your employees do not come in to the workplace more often.

SCALE:

1. Major reason
2. Minor reason
3. Not a reason at all
4. Does not apply to my organization

(RANDOMIZE)

26. Lack of convenient public transit to get to the workplace
27. Concerns about their safety on public transit
28. Concerns about their safety in the neighborhood where the workplace is located

- 29. Preference for working at home
- 30. The cost of commuting to the workplace
- 31. The amount of time it takes to commute to the workplace

(END RANDOMIZE)

- 32. Are any of the following benefits available to your employees? *Select all that apply* **(MULTIPLE RESPONSES ACCEPTED)**

- 1. Free parking on site or nearby the workplace
- 2. Free or subsidized public transit benefits
- 3. Free employee commuter shuttles
- 4. Regular or intermittent company-supported social events at workplace locations
- 5. Free meals at workplace locations

- 33. Thinking about your employees who come into the workplace, what is your best guess of the percentage that take public transit at least some of the time to get there? **(Sliding scale from 0-100)**

- 34. In the past few months, what have you heard from your employees about changes (positive or negative) in the experience of riding transit – if any? **(OPEN ENDED QUESTION, TEXT BOX)**

- 35. Thinking about what would be helpful for your employees, do you have any specific recommendations for Bay Area public transit agencies? **(OPEN ENDED QUESTION, TEXT BOX)**

QC. Please include your contact information here to receive future communications from the BAC Employer Network, including future iterations of this survey and the survey results. **Note: Your information will not be linked to your response, and information shared will only be used for communication purposes for this project.*

Name:

Organization:

Email Address:

5. February 2025

Bay Area Return to Office Survey: February 2025

The following survey is intended to gather information on Bay Area employers' return to office plans to assist transit agencies in planning for the future. All information collected is anonymous. When answering each question, please make your best guess or estimate, selecting the answer that is most applicable to you. This survey should take roughly 5 minutes to complete.

36. In which Bay Area county/counties is your organization located? (Select all that apply)

1. Alameda
2. Contra Costa
3. Marin
4. Napa
5. San Francisco
6. San Mateo
7. Santa Clara
8. Solano
9. Sonoma

37. **(IF MORE THAN 1 SELECTED IN Q1)** And which county do you consider the primary location for your organization? **(SHOW AS OPTIONS ONLY COUNTIES SELECTED IN Q1)**

38. Which industry sector is your organization most closely associated with?

1. Construction
2. Manufacturing
3. Real Estate
4. Legal and Accounting
5. Architecture and Design
6. Media
7. Biotech/Life Sciences/R&D
8. Technology
9. Education
10. Health Care
11. Leisure and Hospitality
12. Government

13. Finance and Insurance
 14. Trade, Transportation, or Utilities
 15. Personal Services
 16. Nonprofit/Foundation/Philanthropic
 17. Other (open text box)
39. How many people does your organization employ in the Bay Area?
1. Under 25
 2. 25-100
 3. 101-1000
 4. 1001-10,000
 5. Over 10,000
40. As the Bay Area recovers from the COVID-19 pandemic, when do you expect to fully implement your company's long-term policy for in-person and remote work?
1. We have already fully implemented our long-term policy
 2. Within the next month
 3. 1-2 months
 4. 3-4 months
 5. 5-6 months
 6. 7-11 months
 7. At least one year
41. How many offices or work locations does your organization have in the Bay Area that employees can visit or work in?
1. None – we are a fully remote organization → **SKIP TO THANK YOU AND END**
 2. One
 3. Two to Four
 4. Five or More
42. **Right now, and in six months**, what are your best estimates of the frequency your Bay Area workforce comes/will come to the workplace each week? (Percentages must add up to 100%; Please attempt to make your best guess)
- | | Right
Now | In six
months |
|--|--------------|------------------|
| m. Percentage of Bay Area workforce coming in 0 days a week: | % | % |
| n. Percentage of Bay Area workforce coming in 1 day a week: | % | % |
| o. Percentage of Bay Area workforce coming in 2 days a week: | % | % |

- p. Percentage of Bay Area workforce coming in 3 days a week: % %
- q. Percentage of Bay Area workforce coming in 4 days a week: % %
- r. Percentage of Bay Area workforce coming in 5 or more days a week: % %
-
43. In six months, what is your best estimate of the percentage of your Bay Area workforce that will come to the workplace **on each of the following days of the week?**
- In six months
- l. Percentage of Bay Area workforce coming in on Mondays %
- m. Percentage of Bay Area workforce coming in on Tuesdays %
- n. Percentage of Bay Area workforce coming in on Wednesdays %
- o. Percentage of Bay Area workforce coming in on Thursdays %
- p. Percentage of Bay Area workforce coming in on Fridays %
- q. Percentage of Bay Area workforce coming in on Saturdays or Sundays %
-
44. Do you currently...
1. **Require** some or all employees to visit or work in the workplace a certain number of days each month or week
 2. **Request** some or all employees to visit or work in the workplace a certain number of days each month or week, but not require it
 3. Not have specific expectations for employees to visit or work in the workplace a certain number of days each week or month
 4. Something else (please describe)
-
45. How effective is your current workplace attendance policy at achieving the in-person attendance your company would like?
1. Very effective
 2. Somewhat effective
 3. Not too effective
 4. Not effective at all
-
46. In the past six months or so, have you changed your workplace attendance policy to increase how often your employees are coming in?
1. Yes, we started requiring employees to come in
 2. Yes, we increased how often employees are required to come in
 3. Yes, we made another change (please describe _____)

4. No, we have not made any changes to increase attendance in the past six months
47. As far as you know, do you plan on changing your workplace attendance policy in the next six months or so to increase how often your employees are coming in?
 1. Yes, we plan to start requiring employees to come in
 2. Yes, we plan to increase how often employees are required to come in
 3. Yes, we plan to make another change (please describe _____)
 4. No, we are not planning to make any changes to increase attendance in the next six months

48INT. For each of the following factors, please indicate whether you think that is a reason your employees do not come in to the workplace more often.

SCALE:

1. Major reason
2. Minor reason
3. Not a reason at all
4. Does not apply to my organization

(RANDOMIZE)

48. Lack of convenient public transit to get to the workplace
49. Concerns about their safety on public transit
50. Concerns about their safety in the neighborhood where the workplace is located
51. Preference for working at home
52. The cost of commuting to the workplace
53. The amount of time it takes to commute to the workplace

(END RANDOMIZE)

54. Which of the following are available to your employees? (SELECT ALL THAT APPLY)
 1. Complimentary meals
 2. Complimentary office snacks or drinks
 3. Company-sponsored social events or activities
 4. Complimentary or subsidized gym membership
 5. Cash incentives for coming into the workplace
 6. Free or subsidized parking
 7. Free or subsidized public transit

- 8. Free employee commuter shuttles
 - 9. None of the above
55. Thinking about your employees who come into the workplace, what is your best guess of the percentage that take public transit at least some of the time to get there?
(Sliding scale from 0-100)
56. In the past few months, what have you heard from your employees about changes (positive or negative) in the experience of riding transit – if any? **(OPEN ENDED QUESTION, TEXT BOX)**
57. Thinking about what would be helpful for your employees, do you have any specific recommendations for Bay Area public transit agencies? **(OPEN ENDED QUESTION, TEXT BOX)**
- QC. Please include your contact information here to receive future communications from the BAC Employer Network, including the survey results. **Note: Your information will not be linked to your response, and information shared will only be used for communication purposes for this project.*