PRESS RELEASE

Americans will face more traffic and complexity in hybrid work world
Ipsos finds that Americans' desire for "flex in the city" will mean a bumpy reentry

NEW YORK, June 17, 2021 – As American workplaces reopen, a new Ipsos study predicts that two patterns will emerge: more traffic and an upheaval in commuting routines. These shifts will alter the behavioral and business patterns that companies, workers, their families and businesses had built in the past, according to Ipsos' Commuting issue of **What the Future** magazine.

Besides different routines for morning and evening, for many, there will now be dual in-office days and work-from-home days. One quarter of Americans expect their commutes to change. Of those, 57% expect to drive to work more often, while 21% expect to drive less overall since they'll be working from home. These changes will profoundly affect where and how people live, their sleep patterns, apparel, grooming, meals and snacks, and how they get around.

For example, 41% of people currently working from home say if their employer expected them to return to the office full time, they would consider looking for another job that didn't require them to return to the office, given the same salary and responsibility.

Along with these insights, in this issue of **What the Future**, Ipsos asks auto, urban design and transportation experts four major questions:

- Dustin Krause, director of e-Mobility, Volkswagen North America — Will people change cars if they commute less?

- Richard Florida, urban theorist, professor, author of "Rise of the Creative Class" — Did the pandemic doom mass transit?

- Zabe Bent, director of design, National Association of City Transportation Officials — Will hybrid commuting models change how people use public transportation?

- Ellen Dunham-Jones, director of the Urban Design program, Georgia Tech — Can a little hybrid go a long way to changing our commutes?

In addition, the commuting issue features guidance by Ipsos researchers with solutions for brands to help consumers establish new routines. The full issue is here. Below are research highlights followed by a topline of the survey results:

- When asked about the right post-pandemic mix of working from home versus working at the office, 50% of people currently working from home want to work from home, 28% want to evenly split working from home and office, and 17% want to work at the office.

- 61% of people drive their own vehicle daily while 9% say they never drive; 9% of people walk a half mile or more to get somewhere other than for exercise or enjoyment while 47% say they never walk; 3% of people use public transportation daily while 69% say they never do.

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- 77% of those who commute from a suburb to downtown want flexibility in the amount of time they go to the office; 76% of those who commute to or within suburbs agree and 72% of those who commute to or within an urban area agree.

- 85% of Americans have heard of self-driving cars and 57% of Millennials have a positive view of them.

- 69% of people say they never use public transportation like a train or bus.

- 53% of people say they don't walk to local amenities where they live.

These are the findings of an Ipsos poll conducted between May 13-17, 2021. For this survey, a sample of 2,010 adults age 18+ from the continental U.S., Alaska, and Hawaii was interviewed online in English. The poll has a credibility interval of plus or minus 2.5 percentage points for all respondents.

For full results, please refer to the following annotated questionnaire:

Full Annotated Questionnaire

1. How many cars/vehicles do you/your household own?

	Total (N=2,010)
0	7%
1	40%
2	37%
3 or more	15%

2. Have your car ownership needs changed since the pandemic?

	Total
Yes, I traded in/upgraded a vehicle that I owned	8%
Yes, I acquired an additional vehicle	7%
Yes, I sold a vehicle and now have fewer	4%
No, I have not	82%

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3. Thinking about where you live, which of the following places/locations would it be easy for you to walk to?

	Total
Public park	41%
Grocery store	38%
Restaurants	36%
Public transportation (bus stop/rail station, etc.)	29%
School	25%
Place of worship	22%
A gym/fitness center	19%
Retail shopping center	19%
Sports fields/arenas	13%
Entertainment centers (movie theaters, concert halls, etc.)	11%
Work / your job	10%
None of these	31%

4. And of this same list, which of the following places DO you currently actually walk to?

	Total
Public park	28%
Grocery store	18%
Restaurants	15%
Retail shopping center	9%
Public transportation (bus stop/rail station, etc.)	8%
A gym/fitness center	6%
Work / your job	6%
Place of worship	5%
School	5%
Sports fields/arenas	5%
Entertainment centers (movie theaters, concert halls, etc.)	4%
None of these	53%

5. Thinking about your transportation needs today, how often do you use the following forms of transportation?

    a. Your own car /vehicle

	Total
Daily	61%
Weekly	25%
Monthly	3%
Less than monthly	2%
Never	9%

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b. Public transportation (Train, Bus, etc.)

	Total
Daily	3%
Weekly	6%
Monthly	4%
Less than monthly	18%
Never	69%

c. Car sharing service (such as ZipCar)

	Total
Daily	2%
Weekly	3%
Monthly	3%
Less than monthly	7%
Never	85%

d. Rental car

	Total
Daily	1%
Weekly	1%
Monthly	4%
Less than monthly	28%
Never	66%

e. Taxi cabs/limo services

	Total
Daily	1%
Weekly	4%
Monthly	4%
Less than monthly	17%
Never	74%

f. Ride-sharing apps (such as Uber, Lyft)

	Total
Daily	1%
Weekly	5%
Monthly	8%
Less than monthly	21%
Never	65%

g. Shared rides (such as Uber Pool, Lyft Line)

	Total
Daily	1%
Weekly	4%
Monthly	7%
Less than monthly	16%
Never	72%

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h.   Bike/Scooter

	Total
Daily	3%
Weekly	8%
Monthly	6%
Less than monthly	12%
Never	70%

i.   Walking half a mile or more (to get somewhere, rather than solely for exercise/enjoyment)

	Total
Daily	9%
Weekly	17%
Monthly	10%
Less than monthly	16%
Never	47%

6.   Thinking about cars in the future, manufacturers are working now on self-driving cars. Have you seen, read, or heard anything about self-driving cars in the news?

	Total
Yes, a great deal	23%
Yes, a little	62%
No, nothing at all	15%
Yes (Net)	*85%*

7.   And what is your view of self-driving cars?

	Total
Very positive	13%
Somewhat positive	29%
Somewhat negative	27%
Very negative	20%
Don't know	11%
Positive (Net)	*42%*
Negative (Net)	*47%*

8A. Since the pandemic began, do you walk more often, less often or about the same amount for the following tasks?

a.   Errands

	Total
More often	10%
About the same amount	48%
Less often	17%
Not applicable	25%

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b. Exercise / Fitness

	Total
More often	24%
About the same amount	46%
Less often	14%
Not applicable	16%

c. Commuting to work

	Total
More often	7%
About the same amount	27%
Less often	15%
Not applicable	51%

d. Socializing / recreation

	Total
More often	13%
About the same amount	42%
Less often	26%
Not applicable	19%

8B. Since the pandemic began, do you bike more often, less often or about the same amount for the following tasks?

a. Errands

	Total
More often	7%
About the same amount	31%
Less often	15%
Not applicable	48%

b. Exercise / Fitness

	Total
More often	11%
About the same amount	32%
Less often	12%
Not applicable	44%

c. Commuting to work

	Total
More often	5%
About the same amount	21%
Less often	11%
Not applicable	63%

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d. Socializing / recreation

	Total
More often	6%
About the same amount	27%
Less often	19%
Not applicable	48%

9. Before the COVID-19 pandemic began, meaning in the first few months of 2020, how did you typically commute to work?

	Total
Drive alone	46%
Public transportation (bus, subway, commuter rail, etc.; does not include taxicab or ride-sharing services)	4%
Walk	4%
Carpool	2%
Bicycle or Scooter	1%
Take taxicab or ridesharing services like Uber, Lyft, etc.	1%
Other	1%
Work from home/No commute	7%
Not applicable/Not working during this time frame	33%

10. Before the pandemic began, how long was your typical commute to work, meaning just the one way trip to work?

	Total
Less than 10 minutes	11%
10 to 19 minutes	18%
20 to 29 minutes	13%
30 to 44 minutes	11%
45 to 59 minutes	5%
60 or more minutes	4%
No commute/Worked from home	7%
Not applicable	32%

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11. **[Not asked if Q9 = "Work from home/No commute" or "Not applicable/Not working during this time frame"]** Before the pandemic began, which best described your typical commute?

	Total (N=1,211)
I lived in a suburb and commuted into a downtown or urban area	22%
I lived in a suburb and commuted to a different suburb	21%
I lived in a suburb and commuted within it	19%
I lived in a downtown or urban area and commuted within it	13%
I lived in a downtown or urban area and commuted to a different downtown or urban area	10%
I lived in a downtown or urban area and commuted to a suburb	6%
Other	9%

12. **[Asked if employed full-time, part-time or self-employed]** When all the coronavirus-related stay at home orders end, do you expect your work commute to change?

	Total (N=1,084)
Yes	25%
No	65%
Don't know	9%

13. **[Asked if Q12= "Yes"]** How do you expect your work commute to change?

	Total (N=250)
I expect to drive to work more often	57%
I expect to commute less, in any form, because I will be working from home more frequently	21%
I expect to walk or bike more often	14%
I expect to take public transportation (bus or rail) more often	12%
Don't know	6%

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14. Are you currently working from home, for at least a majority of the time, because of the pandemic?

	Total
Yes, working mostly from home	13%
Yes, working completely from home	15%
No	34%
I am not currently working	38%
Yes (Net)	*28%*

15. **[Asked if Q14 = "Yes, working mostly from home" or "Yes, working completely from home"]** Thinking of a time when the pandemic restrictions are lifted, to what extent do you agree or disagree with the following statements?

Total Agree Summary

	Total (N=500)
I am more productive with a flexible work schedule	73%
Employers should be more flexible in terms of requiring employees to go to an office	72%
I want flexibility in the amount of time I go into the office	71%
I miss being around my coworkers	48%
I miss out on office "culture" by working from home	45%
It is harder to build trust and connection with my colleagues when working from home	43%
If my employer expected me to return to the office full time, I would consider looking for another job that didn't require me to return to the office, given the same salary and responsibility	41%
It would be harder for me to onboard to a new job remotely than on-site	40%
I worry about being left out of decision-making and professional development if I do not go back into an office	34%
I feel more burned out by work when I work from home	31%
My home is a difficult place to be productive	26%

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a. If my employer expected me to return to the office full time, I would consider looking for another job that didn't require me to return to the office, given the same salary and responsibility

	Total (N=500)
Strongly agree	18%
Somewhat agree	23%
Neither agree nor disagree	24%
Somewhat disagree	19%
Strongly disagree	16%
Agree (Net)	*41%*
Disagree (Net)	*35%*

b. I want flexibility in the amount of time I go into the office

	Total (N=500)
Strongly agree	37%
Somewhat agree	34%
Neither agree nor disagree	20%
Somewhat disagree	4%
Strongly disagree	5%
Agree (Net)	*71%*
Disagree (Net)	*9%*

c. I am more productive with a flexible work schedule

	Total (N=500)
Strongly agree	39%
Somewhat agree	34%
Neither agree nor disagree	18%
Somewhat disagree	6%
Strongly disagree	3%
Agree (Net)	*73%*
Disagree (Net)	*9%*

d. My home is a difficult place to be productive

	Total (N=500)
Strongly agree	10%
Somewhat agree	16%
Neither agree nor disagree	18%
Somewhat disagree	24%
Strongly disagree	32%
Agree (Net)	*26%*
Disagree (Net)	*56%*

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e. I feel more burned out by work when I work from home

	Total (N=500)
Strongly agree	11%
Somewhat agree	21%
Neither agree nor disagree	25%
Somewhat disagree	18%
Strongly disagree	26%
Agree (Net)	*31%*
Disagree (Net)	*44%*

f. I miss being around my coworkers

	Total (N=500)
Strongly agree	14%
Somewhat agree	33%
Neither agree nor disagree	26%
Somewhat disagree	12%
Strongly disagree	15%
Agree (Net)	*48%*
Disagree (Net)	*27%*

g. Employers should be more flexible in terms of requiring employees to go to an office

	Total (N=500)
Strongly agree	40%
Somewhat agree	32%
Neither agree nor disagree	19%
Somewhat disagree	8%
Strongly disagree	1%
Agree (Net)	*72%*
Disagree (Net)	*9%*

h. It is harder to build trust and connection with my colleagues when working from home

	Total (N=500)
Strongly agree	12%
Somewhat agree	31%
Neither agree nor disagree	24%
Somewhat disagree	19%
Strongly disagree	14%
Agree (Net)	*43%*
Disagree (Net)	*33%*

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i. I miss out on office "culture" by working from home

	Total (N=500)
Strongly agree	13%
Somewhat agree	32%
Neither agree nor disagree	20%
Somewhat disagree	14%
Strongly disagree	21%
Agree (Net)	*45%*
Disagree (Net)	*34%*

j. I worry about being left out of decision-making and professional development if I do not go back into an office

	Total (N=500)
Strongly agree	11%
Somewhat agree	23%
Neither agree nor disagree	21%
Somewhat disagree	20%
Strongly disagree	24%
Agree (Net)	*34%*
Disagree (Net)	*44%*

k. It would be harder for me to onboard to a new job remotely than on-site

	Total (N=500)
Strongly agree	14%
Somewhat agree	26%
Neither agree nor disagree	32%
Somewhat disagree	16%
Strongly disagree	12%
Agree (Net)	*40%*
Disagree (Net)	*28%*

16. In your opinion, what is closest to the right mix of working from home versus working in an office for after pandemic restrictions are lifted? Please select one.

	Total
All at home	9%
Mostly at home	14%
Evenly split at home and at the office	18%
Mostly at the office	11%
All at the office	14%
Don't know/Not applicable	35%
At Home (Net)	*23%*
At the Office (Net)	*25%*

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About the Study

These are some of the findings of an Ipsos poll conducted between May 13-17, 2021. For this survey, a sample of 2,010 adults age 18+ from the continental U.S., Alaska, and Hawaii was interviewed online in English.

The sample was randomly drawn from Ipsos' online panel, partner online panel sources, and "river" sampling and does not rely on a population frame in the traditional sense. Ipsos uses fixed sample targets, unique to each study, in drawing a sample. After a sample has been obtained from the Ipsos panel, Ipsos calibrates respondent characteristics to be representative of the U.S. Population using standard procedures such as raking-ratio adjustments. The source of these population targets is U.S. Census 2018 American Community Survey data. The sample drawn for this study reflects fixed sample targets on demographics. Posthoc weights were made to the population characteristics on gender, age, race/ethnicity, region, and education.

Statistical margins of error are not applicable to online non-probability polls. All sample surveys and polls may be subject to other sources of error, including, but not limited to coverage error and measurement error. Where figures do not sum to 100, this is due to the effects of rounding. The precision of Ipsos online polls is measured using a credibility interval. In this case, the poll has a credibility interval of plus or minus 2.5 percentage points for all respondents. Ipsos calculates a design effect (DEFF) for each study based on the variation of the weights, following the formula of Kish (1965). This study had a credibility interval adjusted for design effect of the following (n=2,010, DEFF=1.5, adjusted Confidence Interval=+/- 4.0 percentage points).

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About Ipsos

Ipsos is the world's third largest Insights and Analytics company, present in 90 markets and employing more than 18,000 people.

Our passionately curious research professionals, analysts and scientists have built unique multi-specialist capabilities that provide true understanding and powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. We serve more than 5000 clients across the world with 75 business solutions.

Founded in France in 1975, Ipsos is listed on the Euronext Paris since July 1st, 1999. The company is part of the SBF 120 and the Mid-60 index and is eligible for the Deferred Settlement Service (SRD).

ISIN code FR0000073298, Reuters ISOS.PA, Bloomberg IPS:FP

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The publication of these findings abides by local rules and regulations.

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