

# WHAT THE FUTURE: COMMUTING

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**GAME CHANGERS**







# Do we really want flex in the city?

**Two major themes emerge in this issue. First, it is undeniable that our future is traffic and more of it. The second is that flexible or hybrid living, while full of many virtues, will blow the idea of “routine” out of the water.**

Before the pandemic, most of us spent a decent chunk of our lives, as The Police sang, facing the hell of rush hour “packed like lemmings into the shiny metal boxes” of subways, buses and, for most, cars.

Commuting sucked, but it was at least mostly predictable. It had a bass-heavy rhythm that leaned hard on the downbeat. Hybrid is Brubeck-style jazz. Each day is a new time signature. As urbanist Ellen Dunham-Jones will point out, commutes will likely be maddeningly unpredictable.

You already had different routines for morning and evening, of course. But now you will also have vastly different routines for in-office days and work-from-home days. It will impact when you sleep, what you wear, your grooming routine, what you eat for meals and for snacks and where you get and prepare that food.

**“Commuting sucked, but it was at least mostly predictable.”**

As employers roll out “back to the office” plans for fall, it’s clear that hybrid and flexibility are not necessarily the same thing. Being told when to be in the office, even if it’s three days and not five, can be more disruptive than being in the office daily. Of course for many, many, many people, economic realities and the nature of many jobs mean that we’ll have no choice in when we work and how we get there.

There are multiple futures. Change means not just being in the office less often, but also being there when—and only when—we want to be or need to be. That will be different for everyone and for every sector. That kind of change will have profound impacts on where and how people live. Our panel in this issue will show many positive and hopeful ways that can spin out.

But due to this unpredictability and our human desire and need for routine, there’s also a future where things go back to the way they were. That has consequences too, especially for our environment.

Read on and see which future makes most sense for you. Will your future office be in your home, or many miles away—or both?

**Matt Carmichael** is editor of *What the Future* and vice president of editorial strategy at Ipsos in North America.

93%

of Americans are car owners.

(Source: Ipsos survey conducted May 13-17, 2021, among 2,010 U.S. adults.)

# The past year hasn't changed Americans' love for cars

52%

of American households own two or more cars.

62%

of Americans who commute from a suburb to downtown own two or more cars.

## Before COVID-19, most commuters drove alone

Q. Before the COVID-19 pandemic began, meaning in the first few months of 2020, how did you typically commute to work?  
(% Drove alone among workers who worked outside of home prior to the pandemic)

Commuted to or within urban area



Commuted within or to a different suburb



Commuted from suburb to downtown

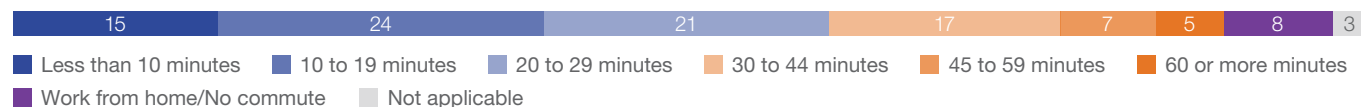


54%

(% Drove alone among Americans currently working from home due to the pandemic)

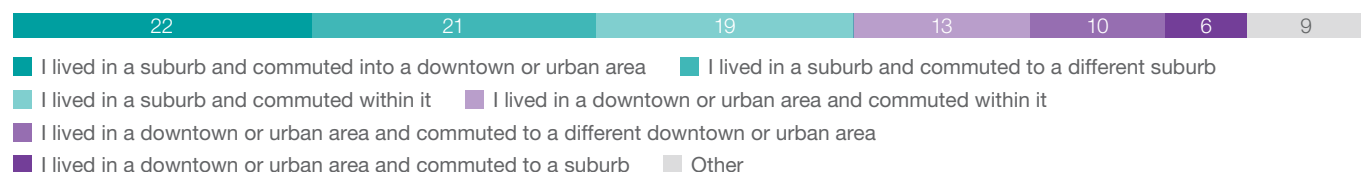
## Working from home is saving hours of commute time

Q. Before the pandemic began, how long was your typical commute to work, meaning just the one-way trip to work?  
(Full-time workers)



## Suburban commuters outnumber urban commuters by double

Q. Before the pandemic began, which best described your typical commute?  
(Total worked outside of home)



## Commuters expect to drive even more in the future

Q. When all the coronavirus-related stay-at-home orders end, do you expect your work commute to change?  
(Yes, among employed)

25%

Q. How do you expect your work commute to change?

2021



2020



- I expect to drive to work more often
- I expect to walk or bike more often
- I expect to take public transportation (bus or rail) more often
- I expect to commute less, in any form, because I will be working from home more frequently
- Don't know

## The Big Question:

How will hybrid work impact our commutes?

(Sources: Ipsos survey conducted May 13-17, 2021, among 2,010 U.S. adults; Ipsos Coronavirus Consumer Tracker survey conducted Dec. 9-10, 2020, among 605 employed U.S. adults, including 149 who expect their commutes to change.)



# Question:

## Will people change cars if they commute less?



**Dustin Krause**

**Director of e-Mobility,  
Volkswagen North America**

**Dustin Krause's automotive career has been focused on the future of vehicles.**

He started with Tesla and now is director of e-Mobility at Volkswagen North America in its ambitious bid to become the global electric vehicle market leader by 2025. Krause led the recent launch of VW's ID.4 EV entry at a time when people are planning their return to commuting and when awareness of sustainability and gasoline shortages have been top of mind. When he thinks **What the Future**, he's focused on making people's commutes more intuitive, efficient and productive whenever they drive.

# 57%

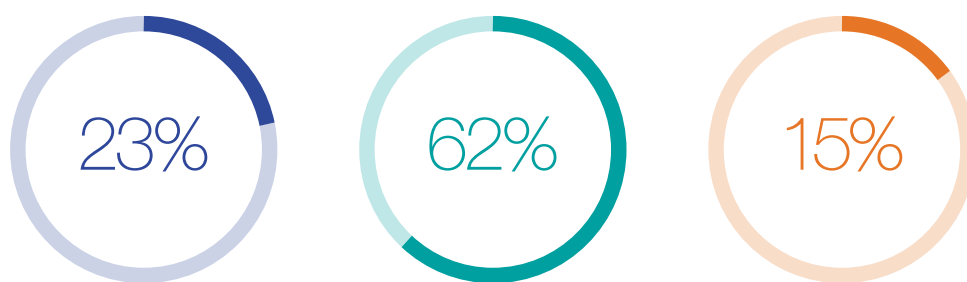
**of Millennials have a positive view of self-driving cars.**

(Source: Ipsos survey conducted May 13-17, 2021.)



## What's the buzz on self-driving cars?

Q. 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?



■ Yes, a great deal ■ Yes, a little ■ No, nothing at all

(Source: Ipsos survey conducted May 13-17, 2021, among 2,010 U.S. adults.)

### **Kate MacArthur: As we enter a new culture of hybrid work, how will that affect how people think about using and owning a personal vehicle?**

Dustin Krause: If we continue down a hybrid work model, it's really getting people to think, "OK, what does this mean for me in terms of a living situation, too?" As the tech and automotive sectors advance electrification, and autonomy develops further, I think that will only solidify people's choices to reconsider whether they're living in the city or out. If you're in the city, the idea of owning a car could very much change. You're using a ride-share service or something else like that. If you want to live 100 miles away from work, you'll have the ability to use that time when you're in the car, if you have full autonomy.

### **MacArthur: How far out are we from that now?**

Krause: It really is a question of when, not if, Level 5 [full] autonomy will come. You just need to get to the full range of

services around the vehicle like electrification, the sensing suite that enables the car to understand the world around it, processing power and some hive data collection.

**"It really is a question of when, not if, Level 5 [full] autonomy will come."**

But that will certainly change the landscape of the way people use the ownership model of cars. Of course, the biggest of all of them is likely the safety of vehicles, too. Cars become orders of magnitude more safe for your morning commute.

### **MacArthur: Our recent surveys show some people expect that they will drive more and want to work remotely at least partially, going forward. How are you planning for drivers who will be living two different lifestyles?**

Krause: Customers are looking for ways to be more sustainable, too. If now is the time to move to this new powertrain technology with electrification, we know that a huge amount of folks are on the fence. They've been thinking about it for a while. If you're going to drive, you want a car that's the next generation of technology.

### **MacArthur: As we move to a hybrid work situation, will consumers want to own or rent more?**

Krause: As new technologies come out, usually buyers have some trepidation about fully adopting them. But even looking at the current model and lease rates, we're finding that it mirrors the relationship between purchasing and leasing that we have now for internal combustion engines.

# Who has the most affinity for self-driving cars?

Q. What is your view of self-driving cars?

Ages 18-34



Ages 35-54



Ages 55+



■ Very positive ■ Somewhat positive  
■ Somewhat negative ■ Very negative ■ Don't know

(Source: Ipsos survey conducted May 13-17, 2021, among 2,010 U.S. adults.)

We've seen some companies come out that have tried different kinds of shared models and other things. None of them are really taking off in a big way yet. But with the advancement of some technology in the actual product, you might see that connectivity and autonomy and electrification actually unlock that ability and will make it a lot easier to do.

**MacArthur:** There've been different articles about people downsizing the number of their cars because they weren't expecting to drive as much. How does that factor into how you plan for future demand?

Krause: Cars are one of those items that do wear. Over time, people decide to upgrade and do other things. But the question that people are asking now as they upgrade is "Am I going to get an internal combustion car or am I going to get an EV?" We're seeing a cycle start to happen where customers are saying that it is now the time. And if not, almost certainly the next time I buy, I'm going to go with an EV because it's so certain that this is the emerging technology.

**MacArthur:** We've seen municipalities move restaurant dining into parking areas to keep restaurants operating during the pandemic. How will that change what people need from their cars to accommodate more closed streets?

**"As the tech and automotive sectors advance electrification, and autonomy develops further, I think that will only solidify people's choice to reconsider whether they're living in the city or out."**

Krause: If we look at the really long term, where cars have become very autonomous and change the world as we know it, cars could potentially be in a fleet and constantly working, right? Things like these huge parking lots and other things just may not be as needed.

**MacArthur:** I would imagine that cities are talking to automakers and other transportation organizations. Are all the prior urban plans being rewritten now that we've had this major disruption to the future? What's going to happen there?

Krause: Look at 2025 and 2030 as important tipping points as we start to see a lot of the investments from both our own company, and then other companies really start to come into fruition.

Generally, municipalities and governments will lag a little bit behind technology and adoption. Likely we're going to see a lot of these things come to fruition within this decade.

**MacArthur:** What will that mean then for the future of car culture? Given that the pandemic changed how we think about our actual living rooms, did the same thing happen with cars that we now consider our mobile living rooms?

Krause: I think it did. But the thing that people are looking to change is that the next car that they buy will be an electric vehicle. Everyone's going to, especially over the next five years and then a little bit longer. We'll be married to even more technology in the vehicle.

*Kate MacArthur is deputy editor of What the Future and deputy editor of editorial for Ipsos in North America.*



# Is safety the way to pitch autonomous vehicles?

**Despite continuous advances in autonomous technology, American drivers still need more safety evidence to embrace autonomous vehicles. However, there is a path forward to broaden adoption.**

While a fully autonomous vehicle is a scary notion for the average driver, the industry can promote multiple Advance Drive Assist Systems (ADAS) features for a safer, more controlled semi-autonomous experience, paving the way for broader understanding and acceptance of autonomous.

ADAS, combined with features like blind spot detection, lane centering and crash avoidance, creates a semi-autonomous experience for drivers. These combinations provide a real-world example of what the vehicle can do to avoid accidents and help the driver.

Although fewer than 20% of U.S. vehicle owners have experienced semi-autonomous vehicles, they have been gaining traction in the last few years. Since 2019, the percentage of American drivers who report driving or riding in semi-autonomous modes grew by 8 percentage points. This is a result of many automakers including ADAS as a standard feature in new vehicles.

What's key is that Americans who have experience using semi-autonomous features were three times more likely to have

interest in getting a vehicle with an autonomous driving functionality, according to the Ipsos Mobility Navigator Global study.

Safety has always been an important factor in automotive decision-making. Clearly, that definition is evolving in importance over the last year with crash protection, crash prevention, personal safety and now personal protection from COVID-19.

Another trend is the growing level of driver distraction from multiple alerts in the vehicle, consumers talking on their smartphones or even reading or texting on their smartphones.

Today's drivers believe they encounter a distracted driver in one of every two drives they take, per another recent Ipsos survey. Drivers need help to remain safer while driving, even if they don't want to admit it.

Auto manufacturers that connect ADAS marketing efforts to the core consumer need of "safety" can persuade customers to use the functionality of these features and reduce accidents in the future.

**John Kiser** is a senior vice president in Ipsos' U.S. Automotive & Mobility service line.

## Can experience with semi-autonomous features warm people to autonomous?

Q. An autonomous driving vehicle (aka self-driving vehicle) can drive itself from a starting point to a predetermined destination by using various in-vehicle technologies. How interested are you in [an] autonomous driving vehicle? (% Interest by experience)

Driven/ridden in semi-autonomous



No experience



(Source: Ipsos Mobility Navigator Module 1 conducted Apr. 9-19, 2021, among 2,000 U.S. new vehicle owners.)

# Question:

## Did the pandemic doom mass transit?



**Richard Florida**

**Urban theorist, professor,  
author of “Rise of the  
Creative Class”**

# 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.

(Source: Ipsos survey conducted May 13-17, 2021, among 500 U.S. adults who work all or mostly from home because of the pandemic.)

**While we only have a handful of cities in the U.S. with major mass-transit systems, those cities are huge hubs of commerce. How will the pandemic remake the way we work and our urban commutes?**

Famed urbanist Richard Florida remains bullish on our downtowns, but when he thinks **What the Future**, he wonders if we're headed for an even more bifurcated experience between “creative class” knowledge workers and everyone else.

**Matt Carmichael: Say it's 2026. How many of us are still hybrid?**

Richard Florida: The best estimates are 20% of workdays. That's a pretty significant chunk. I think the nature of the office itself will have to change to do that.

**Carmichael: We've been able to coast on our longstanding in-office relationships. Will those “office culture” impacts drive us back to work?**

Florida: I think there's a demographic part to this. That's why this stuff is always more subtle and nuanced. For organizations, the challenge is how do you build a culture when part of your staff wants to be around a lot and another part of your staff is around more part-time? That shifts the nature of





**“We will still get more traffic, and the traffic is not only going into downtown, but it’s people running around the suburbs.”**

the office as a place you plug your laptop in to a place that is much more about social context and social interaction.

**Carmichael: Our data show those who have kids at home are more likely to say that their ideal mix of home office is actually at the office.**

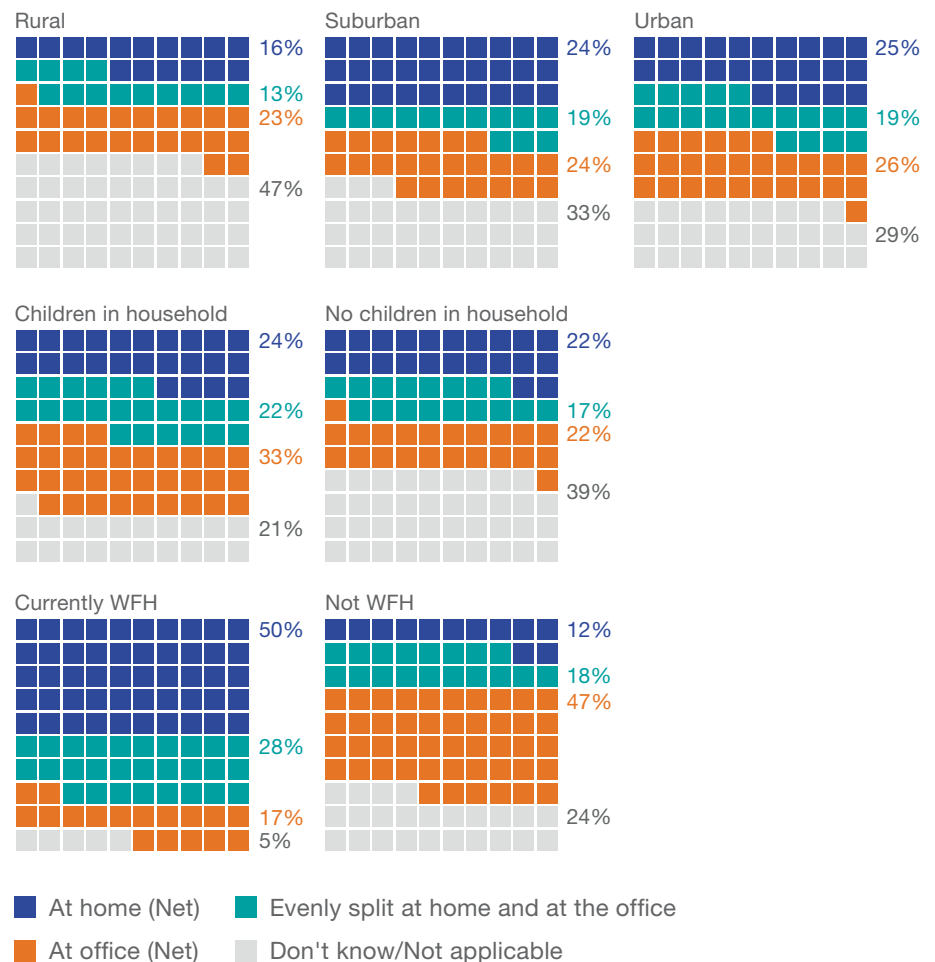
Florida: People with families want to work someplace quiet. That doesn’t mean they want to go to a downtown office. And I think that’s the important point. What people don’t want is a long, arduous commute on transit. Maybe that goes away in a few years, but clearly people remain fearful of transit. The anecdotal evidence we have from talking to office developers is that suburban office parks are filled — where people can drive — and their downtown offices are at 15% of capacity.

**Carmichael: What does that mean for public transportation?**

Florida: I don’t think Americans have ever liked public transportation. I mean, look, I’m an urbanist and I extoll its benefits, but to be honest with you, when I was researching “Rise of the Creative Class,” people really didn’t like buses. It has to do somewhat with the nature of our transit systems, which aren’t particularly beautiful. Subways particularly are perceived rightly or wrongly as being not safe. Less advantaged people have no choice, they have to take it. But for professional knowledge and creative workers, they’re not enthusiastic. I think it’s one of the reasons people leave cities.

## What working model is best?

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



(Source: Ipsos survey conducted May 13-17, 2021, among 2,010 U.S. adults.)

Carmichael: What does that mean for our public transportation systems and the governments that fund them if ridership starts decreasing?

Florida: There's no doubt about it, it's decreasing all over the world. There are going to be fewer work trips. Transit will have to be used to support more occasional trips and leisure trips. It's not going to be the men in the gray flannel suits boarding the morning train going to their office every day as they did in "Mad Men." All of that means less revenue, which means less upkeep, which means less attractive. It's not a great time to be trying to support a mass transit business.

Carmichael: One of the things we've seen in our data is that people who expect their commutes to change expect to drive more than drive less.

Florida: I think people are just not going to come downtown as much. I think they're just going to refuse. They're going to say, "I'm happy to work. I'm happy to work from home and I'm happy to work from a satellite

office center." I think we will very quickly scale up our coworking infrastructure, into suburban office parks and abandoned malls. I think the hub/satellite office model makes sense. We'll see people commuting less and people working closer to where they live, not necessarily in the home, but in some kind of office environment. We will still get more traffic, and the traffic is not only going into downtown, but it's people running around the suburbs. The net effect of this is more traffic on the roads, not less.

Carmichael: Does that lean people toward working more hybrid again anyway?

Florida: It depends on what industry and how much leverage you have. My friends who work in finance or real estate are already back in New York City and already wearing a suit and tie. But for many, maybe they'll stagger their schedule a little. Work from home in the morning and then drive into their suburban office or coworking space in the afternoon. That still means more cars on the road. I think you'll end up with more cities that look like Toronto, with massive traffic jams going

downtown and going all across the suburbs and more cities starting to look like L.A., with traffic everywhere.

Carmichael: What does this mean for cars and for ride-sharing, and for all of this great infrastructure being built around biking in downtowns? Does that momentum keep up? Does it accelerate?

Florida: I'm very optimistic about the future of cities. I think the biking and walking keep up because it's a much more efficient way to do your day-to-day activities. Biking and moving dining options to the street all become part of what a city offers. The people who live in cities increasingly are not going to be the amenity lovers like we saw in the 2000s and 2010s. It's going to be more people who work in finance and real estate and need to go to the office. Those people are going to live closer and increasingly where they can walk or bike and not take the subway.

*Matt Carmichael is the editor of What the Future and VP of editorial strategy for Ipsos in North America.*

How does age shape attitudes about working models?



(Source: Ipsos survey conducted May 13-17, 2021, among 500 U.S. adults who work all or mostly from home because of the pandemic.)



# What will your brand's role be in the new morning commute?



**For workers returning to some pattern of the morning commute, the new routine will bring joy, anxiety or a mix of the two.**

Around 60% of Americans indicate that some aspect of their day will change again as they undergo the reentry process, according to a recent Ipsos survey. Routines will be disrupted and rebuilt, but many will often have hybrid routines — one for in-office days and one for work-from-home days. From appearance to meals to safety to time management, consumers are evaluating priorities and how best to meet their evolving needs — and which brands and services they will turn to for support.

Even before we return to the office, we will evaluate our wardrobe. Will our old work clothes still fit, not only in size, but also with evolving views on comfort versus professionalism? Retailers and brands can help workers solve for these competing priorities.

Nearly one in five (17%) consumers expects their morning beauty and grooming routines to change. That change will start as they evaluate what will be most important when it comes to their appearance. Will the DIY skills they developed this past year be good enough for more direct contact with others? Will saving time and money by continuing to DIY be more important than the results and experience we would get when using professional services? Brands will want to be top-of-mind as people establish routines, and they should consider messaging around saving time and money while achieving a desired look.

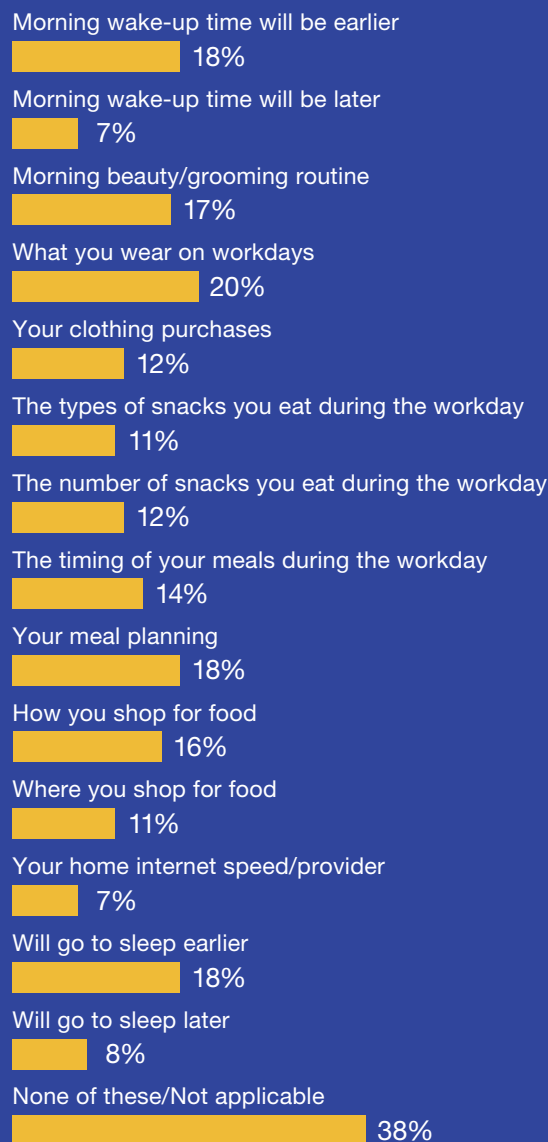
What about meals? How will we choreograph breakfast, packing our backpacks and work gear, and getting out the door on time for in-office days? How will we manage lunches? Will we take leftovers, look for single-serve meal options, or increase our use of takeout? When and where will we snack, and where will we buy those snacks? Retailers and food manufacturers should provide on-the-go options and support consumers with fast, easy and healthful meal ideas that not only feed the family, but also allow for taking leftovers that can be easily consumed at the office.

The return to the office is an important stress test for the future of hybrid work. Brands have the opportunity to connect with consumers to establish their place as helpers as workers establish new routines.

*Robyn Clayton is a director in Ipsos' Qualitative service line.*

## How ready are we for hybrid commuting?

Q. As workplaces continue to reopen, which of the following will change for you?



(Source: Ipsos survey conducted May 25-26, 2021, among 667 employed U.S. adults.)

# Question: Will hybrid commuting models change how people use public transportation?



**Zabe Bent**

**Director of design,  
National Association of City  
Transportation Officials**



**Commuting in the pandemic for many meant ditching public transportation for driving or other modes, if they weren't working from home.**

For Zabe Bent, director of design at the National Association of City Transportation Officials, this gives municipalities the opportunity to reassess their transportation systems. When she thinks **What the Future**, she's thinking about ways to remove barriers keeping cities from doing the things they always wanted to do or known they should do.

## 53%

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

(Source: Ipsos survey conducted May 13-17, 2021, among 2,010 U.S. adults.)

**Kate MacArthur: As people go back to offices and some sort of hybrid commuting mode, how are you thinking about what that means for transportation services?**

Zabe Bent: The daytime commuters, the office commuters, that's really only 20% of trips. A lot of our transportation systems are based on this type of pattern. And one of the things that we saw during the pandemic is those were not the people who were continuing to travel during the pandemic and certainly not traveling during the peak hour.

We need going forward to focus on the people who actually need to travel, the times of day that they need to travel, where they're going to, and which of those trips need to be bike-based, pedestrian-based and which of those trips should be on transit.

**MacArthur: We're also seeing in our research at least a quarter of the people who expect their commute to change expect to drive more.**

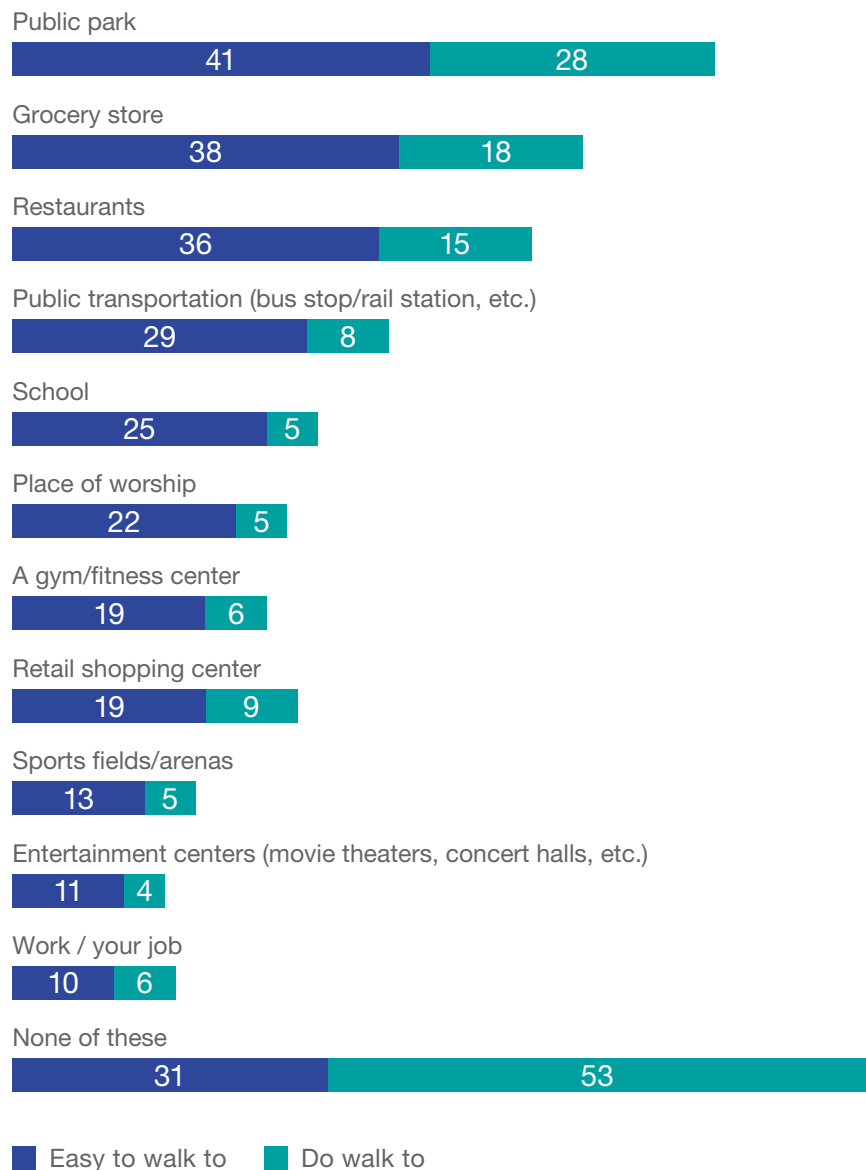




**“Available doesn’t mean attractive. If any portion of that trip is unavailable or unattractive, it’s going to impact the rest of your trip.”**

## Will making walking more convenient inspire more pedestrians?

Q. Thinking about where you live, which of the following places/locations would it be easy for you to walk to/Do you currently actually walk to? (Total)



Bent: People make decisions based on the options that are placed in front of them. A lot of our options right now tend to be focused on driving for a whole host of reasons. We invest more in driving or driving during the peak, and I think we need to make sure that people can walk their trip, whether it’s going to have lunch at a nearby restaurant or getting on transit to go to a hospital or work or school. And those won’t be real options for people until we invest in them.

**MacArthur: When we asked people about what was easy for them to walk to, and what they actually walk to, the number dropped by almost half.**

Bent: Available doesn’t mean attractive. If any portion of that trip is unavailable or unattractive, it’s going to impact the rest of your trip. We have to invest in these options and make them as good or better than driving.

(Source: Ipsos survey conducted May 13-17, 2021, among 2,010 U.S. adults.)

**MacArthur: The American culture is very car-oriented, so that seems to be very entrenched behavior.**

Bent: We think that it is entrenched because it has been this way all along. But if you look at pictures of, say, Amsterdam from 30 years ago or more, you see a lot of cars. They decided to move toward investment in these other options. The question is, are we actually going to take that leap of faith and say we can live differently and live well? We haven't really done enough of that here.

**MacArthur: Through this pandemic we saw sidewalks being pushed out for dining and closed streets. Are you hearing from communities about how much these changes will stick going forward?**

Bent: Yeah and the decision about what sticks and what doesn't and where has to be made at a local level. We're already seeing some cities saying, "We are going to make open streets permanent, or we're going to make these types of open streets permanent." I think open streets can and should be a starting place. Essentially, this is a way to reclaim public space and to decide what's the best way to use it. In some cases, that might be outdoor learning. In other cases it might be a mobility hub or a community space.

**MacArthur: There is a move toward electric, semi-autonomous and at some point, autonomous cars. Where do those fit in how you're thinking about transit hubs and city planning?**

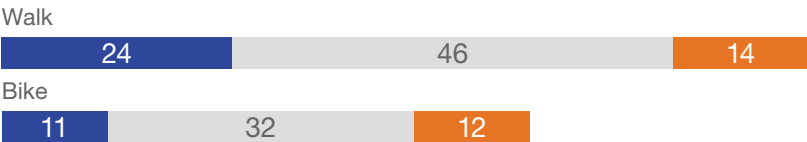
Bent: In my mind, a car is a car. The things you do with and in that car should make sense within the system. We should figure out options for making it shared versus privately owned. How do we make it equitable so everyone has access to these different needs as we think about how they would fit into a system with open streets or shared streets? What does car culture mean for the disabled community? We have to understand what it means person by person, either by mode, demographic group, racial group, all of those things.

**MacArthur: If we're going to a hybrid commute model, how do you plan for that for the long-term?**

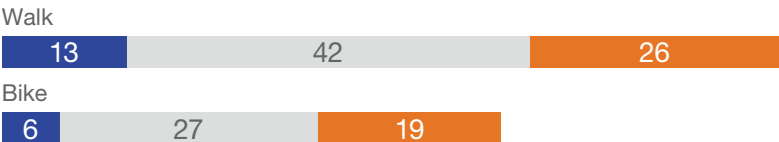
## How will walking/biking fit in our future transportation plans?

Q. Since the pandemic began, do you [...] more often, less often or about the same amount for the following tasks?

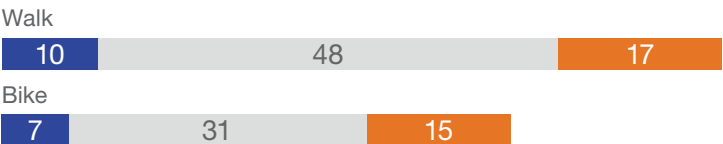
### Exercise / Fitness



### Socializing / Recreation



### Errands



### Commuting to work



More often    About the same amount    Less often

(Source: Ipsos survey conducted May 13-17, 2021, among 2,010 U.S. adults.)

Bent: We look at what the feedback is from people, what their concerns are, how that matches to different times of day, different commute patterns that we're seeing and trends that we're seeing and try to solve for them. And to make sure that we are actually being proactive about that so that we're not recreating the mistakes, quite honestly, of the past.

### MacArthur: Can you give an example?

Bent: What are the policies that need to be in place today that are really different from what we had before? Our commuter benefits really favor drivers. Transit can be expensive in some cities, and it should really reflect how much it costs to travel. Full stop. We should also be thinking about how people are traveling or not traveling today. Can Wi-Fi access for

working from home be counted as a commuter or a work benefit? Should we change the metrics so that it's not just about congestion relief, but are we improving someone's accessibility or improving people's safety and mobility right now?

### MacArthur: What else is important?

Bent: We have learned during the pandemic that the office worker is the most flexible worker. But if the pandemic has taught us anything, it's that we need to focus on the most vulnerable users. And if [the pandemic] hasn't taught us that, then we have not been paying attention.

*Kate MacArthur is deputy editor of What the Future and deputy editor of editorial for Ipsos in North America.*



# How can grocery brands make the hybrid evening commute simpler?

## As workers adapt to new hybrid commuting models, they'll need to manage a split schedule of evening meal strategies.

For many workers, the evening commute weighs heavily on dinner meal planning, especially for busy families managing evening activities. This is a make-or-break opportunity for brands to position their solutions to ease this transition and retain brand loyalty.

Depending on which mode workers are in on a given day, brands will need to communicate which dinnertime problem they're solving and why they do it better than the alternatives.

Nearly two-thirds (64%) of households reported they were spending more at grocery stores during the pandemic, per a recent Ipsos survey. However, as the pandemic subsides, nearly half (49%) expect to decrease their current grocery store spending for meals. For households with children, the impact is even more pronounced, as 60% will spend less; 43% by \$160 per month or more. It will be critical for grocery retailers to minimize their revenue impact as shoppers revert to pre-COVID-19 meal spending habits.

Ipsos research reveals ways for brands to reserve space in home commuters' minds. Along with continuing investment in curbside and delivery, nearly 20% of consumers cited three things as top influencers in maintaining their spend with their grocer. Current industry performance in these areas leaves plenty of opportunity to improve:

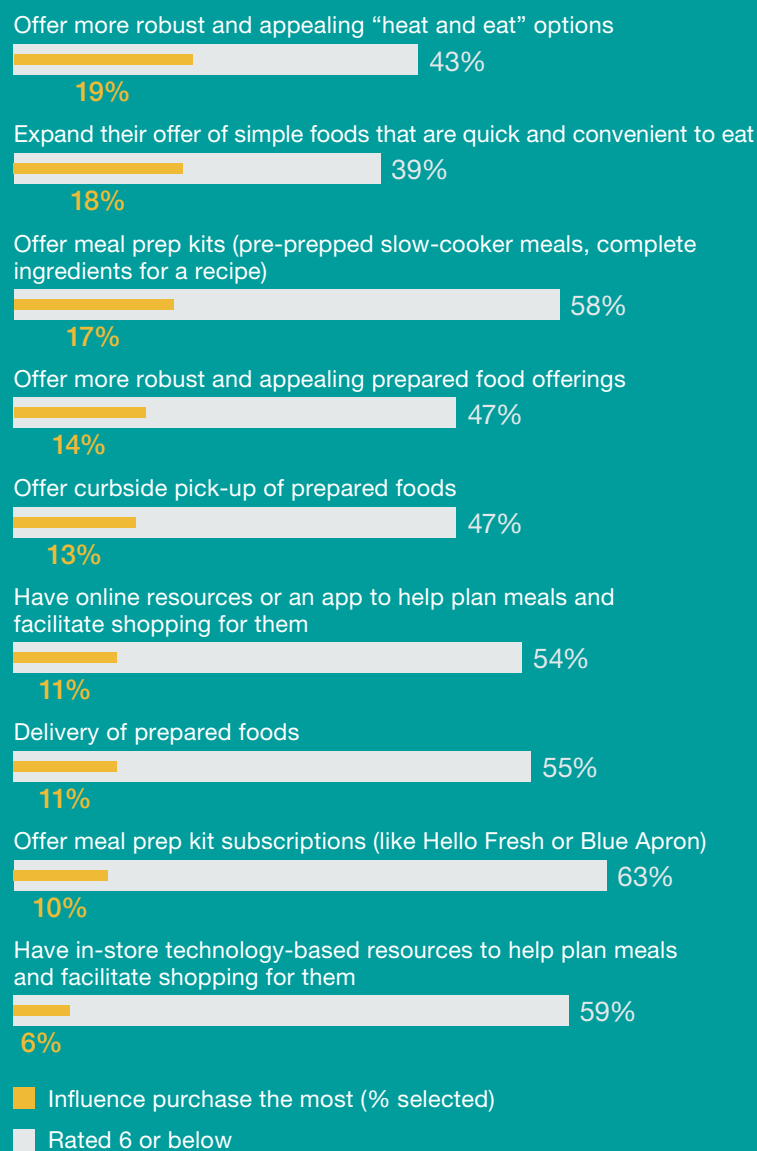
- Offer more robust and appealing "heat and eat" options
- Offer an array of simple foods that are quick and convenient
- Offer meal preparation kits

Grocery retailers face major decisions in terms of prioritizing investments. Consumers have made it clear they want convenience and quality. There are increasing options available to them to have both, from delivery to newly enhanced drive-thrus at QSR restaurants to their favorite local restaurants going above and beyond to get their customers back. By making investments now, grocers will have a better chance at staying in the commuter dinner game.

**Mike Murphy** is vice president of Ipsos' U.S. Channel Performance service line.

## Where are grocers at risk to lose their pandemic gains?

Q. Of the things grocery stores could do to entice you to spend more meal dollars with them, what are the top two that would influence you the most?/On a scale from 1-10 where 1 means poor and 10 means excellent, rate your grocery store on each of the below.



(Source: Ipsos survey conducted Mar. 29-30, 2021, among 1,005 U.S. adults, including 584 who know of or have used the offerings or the services.)





# Question:

Can a little hybrid go  
a long way to changing  
our commutes?



**Ellen Dunham-Jones**

**Director of the Urban  
Design program,  
Georgia Tech**

**Most commuting happens not  
to downtown, but to and among  
our suburbs, where most of  
the jobs are.**

Ellen Dunham-Jones is one of the founders of the new urbanism movement. In her landmark book, “Retrofitting Suburbia,” and its recent sequel, “Case Studies in Retrofitting Suburbia,” she argues that our spaces need to be rethought. When she thinks **What the Future**, she wonders if hybrid working could lead to seismic changes in real estate, commuting and infrastructure.

**69%**

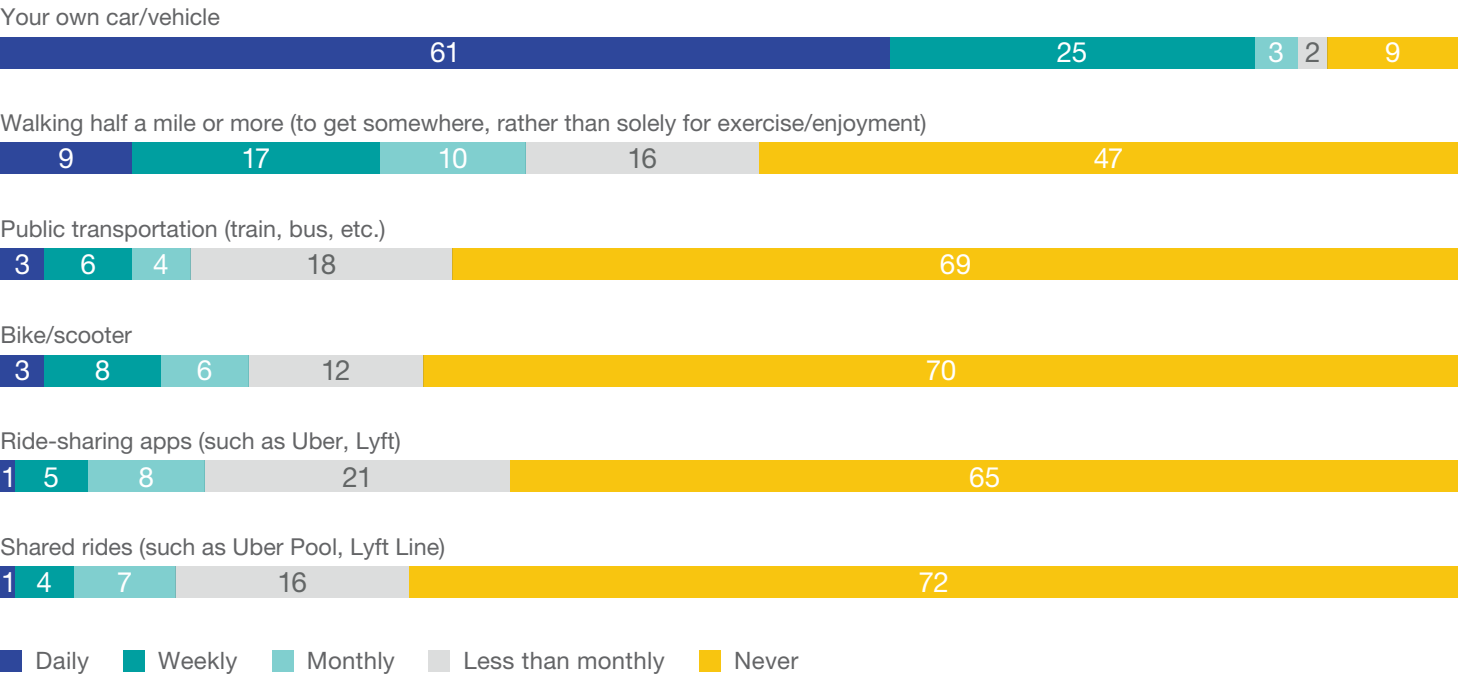
**of people say they never use public  
transportation like a train or bus.**

(Source: Ipsos survey conducted  
May 13-17, 2021, among 2,010 U.S. adults.)



# How does our built environment impact how we get around?

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



(Source: Ipsos survey conducted May 13-17, 2021, among 2,010 U.S. adults.)

## Matt Carmichael: How are suburban commutes different from urban commutes?

Ellen Dunham-Jones: Places that are walkable and have transit have different modes and ways to get around. The commute trip isn't very different from the grocery store trip, the go to the hospital, the go to the doctors, the go to school. So even though the average suburban house generates almost 10 trips per day, the commute trips are just two of those. Yet our suburbs have been planned entirely around the commute trips as the most important. That is what we spend our gazillions of dollars of infrastructure spending on.

## Carmichael: What did the pandemic change about this?

Dunham-Jones: Suddenly it's those non-commute trips, for a lot of work-from-home folks, that replaced the commute time as a de-stressor between work and home.

Carmichael: You have said that the pandemic accelerated a lot of trends about our suburbs. What trends in particular, and what did you see?

Dunham-Jones: The headline is that Millennials are finally leaving cities to move to the suburbs. The reality is that was already happening. But presumably they didn't all hate city life. They aren't dying to mow a lawn and drive around everywhere. They liked urban living. So they've been moving to walkable suburban places, if they can. But if they've been moving out to sprawling suburbs my guess is they

won't stay there unless those suburbs start to retrofit and provide some of the urban lifestyle amenities that this cohort is looking for.

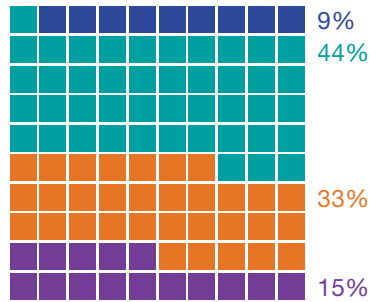
Carmichael: Some companies are saying, "You can be more hybrid, but we still want you in the office 40% to 60% of the time." Is that enough of a difference from a typical five-day week for most people to impact traffic patterns?

Dunham-Jones: Telecommuting has been the holy grail for how we are going to stop traffic congestion since the '60s and '70s. We saw in the pandemic that traffic did really go down. Having three days a week at home is pretty significant. What is weird is the predictability. If you're not always

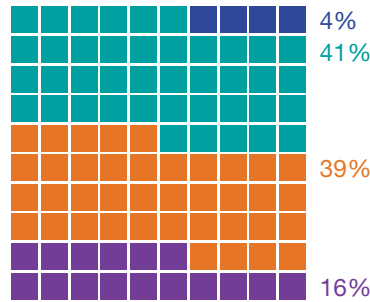
# How does the geography of our commute impact our car ownership?

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

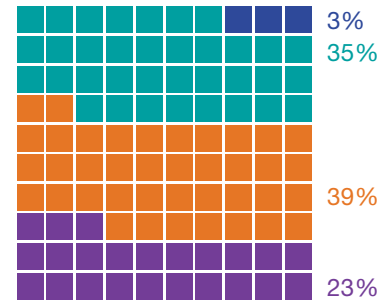
Commuted to or within urban area



Commuted to or within suburb



Commuted from suburb to downtown



0 1 2 3 or more

(Source: Ipsos survey conducted May 13-17, 2021, among 2,010 U.S. adults.)

commuting on the same day, and if that's true of enough other people, it could also end up meaning that you no longer know how long your commute will be. Some days your commute drops to 20 minutes, but other days, suddenly your commute doubles to 60 minutes. That's what will drive you completely insane.

**Carmichael: A changing office changes the real estate picture, too, right?**

Dunham-Jones: Sure, companies are saying, "Not everybody's in the office all day. I don't need to spend all that much money on real estate." But I'm hearing that much more in the cities than in the suburbs. A lot of suburban office folks have always had more parking per employee than the downtowns have had. They think that's actually going to give them an advantage, and more offices are going to move out to the suburbs.

**Carmichael: How might changing commutes change where we want to live?**

Dunham-Jones: Anecdotally, people are willing to lengthen their commute if the commute isn't happening every workday, but I haven't seen a whole lot of real data yet showing it.

**Carmichael: If we move further out, won't it be harder to persuade people to come back more frequently?**

Dunham-Jones: At the moment, all the headlines are focusing on the labor shortage of essential in-person workers.

**"If you're not always commuting on the same day, and if that's true of enough other people, it could also end up meaning that you no longer know how long your commute will be."**

But in the background, a lot of employers have been worried about a shortage of office workers. Will employers be able to really stick with trying to make people come in three days a week, or are we going to see a lot more firms adjust to saying, "If Facebook can do it, if Twitter can do it, yeah, we can just go completely virtual." And that starts to get super interesting.

**Carmichael: How so?**

Dunham-Jones: Real estate prices are traditionally boosted by proximity to good schools, good healthcare and good jobs. As soon as telework, telemedicine, tele-education cuts those cords, we could be on the tip of dramatic reshaping. If the infrastructure bill really does even the playing field in terms of broadband access, we could begin to see a real evening of the playing field between rich and poor places and a lowering of the cost of living for a lot of people. Or we could also easily see a total exacerbation of the segregation of the very of the wealthy from the poor.

**Carmichael: So, what happens to the people who don't have all these options in transportation?**

Dunham-Jones: Part of this opportunity to potentially even the playing field between rich and poor would absolutely have to include that transit-oriented development (TOD) becomes only for people that are absolutely dependent on transit. A lot of communities are sort of hopping on the bandwagon of equitable TOD. I'm excited about some of the bus rapid transit programs that Los Angeles has been doing. Atlanta's about to follow. If you do this right with dedicated lanes, it's as fast as a train and a hell of a lot cheaper. And you get to more places where people need to get to.

**Matt Carmichael** is the editor of *What the Future* and VP editorial strategy for Ipsos in North America.



# How will urban and suburban workers reenter the commute?

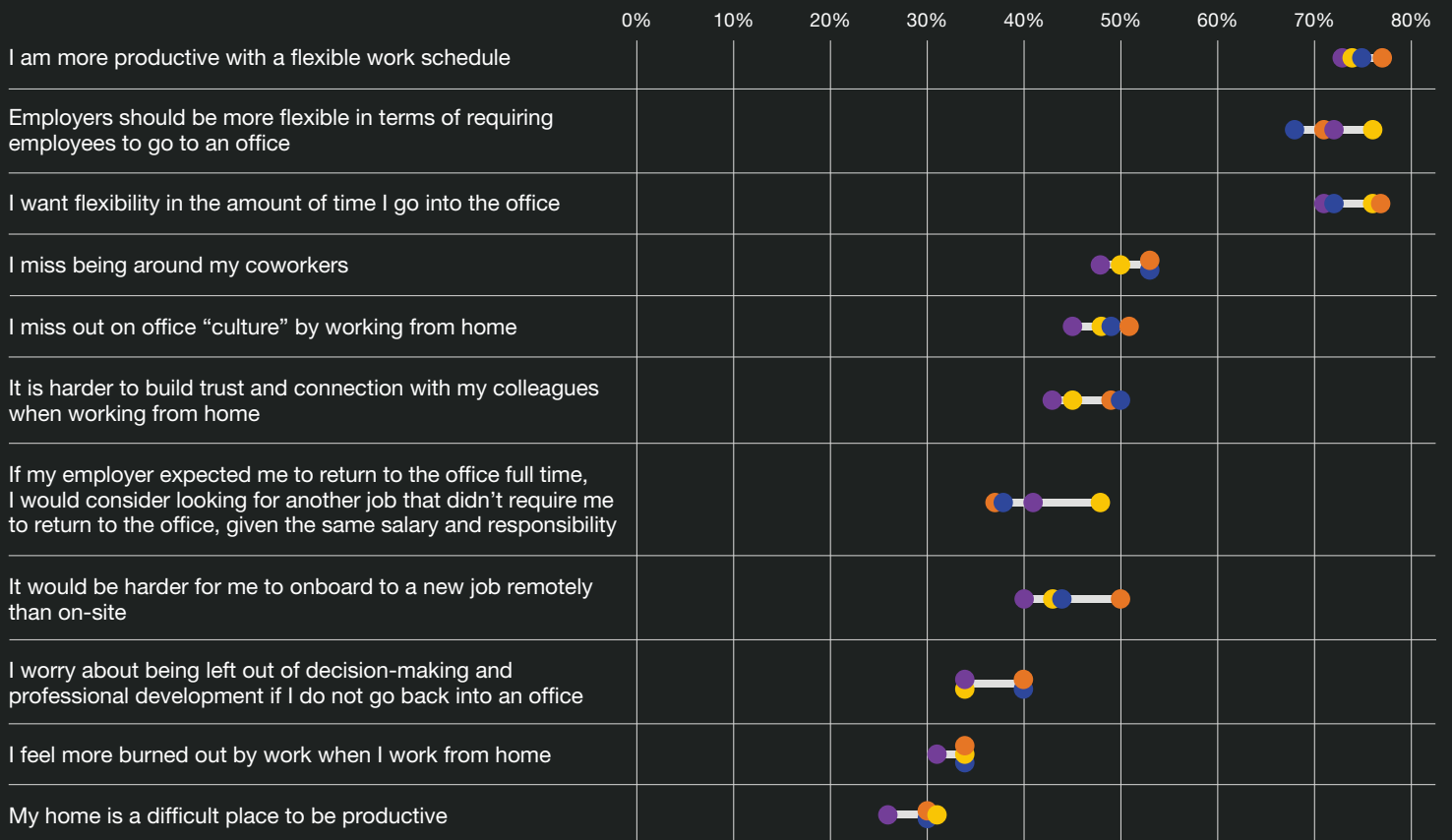
**Employees who commuted to urban areas, within urban areas or to and within suburbs have more in common than you might think. Three in four want a more flexible work schedule and say it leads to greater productivity. All — suburban commuters especially — want employers to be flexible about when or if they need to go into an office.**

And if their employers don't listen? Half of suburban commuters and nearly four in ten of inter-urban or suburb-to-urban commuters say they'll look to switch jobs. They'll find an employer that offers the flexibility they want and now know they can have while still getting their jobs done.

But flexibility doesn't mean they want to leave the office entirely. Companies must keep a close eye on their employees — whose lives are also likely in flux themselves — if they want to remain competitive in this unusual labor market.

## How do commuters define flex in the city?

Q. Thinking of a time when the pandemic restrictions are lifted, to what extent do you agree or disagree with the following statements? (Total agree)



● Commuted to or within urban area ● Commuted to or within suburb ● Commuted from suburb to downtown ● Currently WFH

(Source: Ipsos survey conducted May 13-17, 2021, 500 U.S. adults who work all or mostly from home because of the pandemic.)

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