Thoughts on the Commute

Washington State Transportation Commission
October 19, 2021

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Director of Marketing
Commuting Trends

Overall, we’ve seen a 60% drop in commute trips with the biggest dip at tech companies (85%), compared to just 20% in healthcare.

Increase in carpoolers/vanpoolers compared to bus commuters, especially Healthcare where twice as many are carpooling compared to busing. This was reversed in Jan 2020 before the pandemic.

Biking has gained popularity at University campuses during the pandemic (more so than bus), possibly due to pandemic safety, budgets, commute distance, and/or sustainability.
The post covid commute will look different

- Hybrid work will increase
- Some transit hesitancy
- Possible uptick in parking demand

<table>
<thead>
<tr>
<th>Mode</th>
<th>Pre-COVID</th>
<th>Post-COVID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work from home 1-3 days per week</td>
<td>18%</td>
<td>49%</td>
</tr>
<tr>
<td>Commute with public transportation</td>
<td>56%</td>
<td>24%</td>
</tr>
<tr>
<td>Commute with personal vehicle</td>
<td>66%</td>
<td>34%</td>
</tr>
</tbody>
</table>

2 IPSOS survey of Chinese consumers taken after much of the country ‘returned to normal life’ post pandemic (https://www.cbinsights.com/research/transportation-mobility-trends-qa-q220/)
Our future commute will look different

- Transit is safe and rebounding
- E-bike sales are booming
- Telework is here to stay

The Seattle Times
As Seattle slowly reopens, focus on the facts, not fears, of bus ridership
Transit agencies across the state and country that have been following the science on COVID-19, and have made health and safety for riders and operators job No. 1 - all while keeping operations going throughout the pandemic.

NYT
Farther, Faster and No Sweat: Bike-Sharing and the E-Bike Boom
Farther, Faster and No Sweat: Bike-Sharing and the E-Bike Boom ... Herr, the executive director of the North American Bikeshare Association.
Mar 2, 2021
Covid-19 has reshaped employee work patterns and preferences
Our research identified important trends reshaping the benefits landscape

**Date of Study:** June 2021

**National Sample:** 1,006 employees who transitioned from onsite working environments to remote working environments at least part time
Key takeaways from the survey

- Employees value flexibility above almost anything else
- Remote work support will become increasingly important
- Opportunity to improve commuter experiences
Most organizations expect to bring employees back onsite

Expectations for Returning to Work On-Site (Full-time or Part-time)
(% of respondents; n=1008)

- I have already done so: 29%
- I expect to do so by Sept. 2021: 26%
- I expect to do so by year-end 2021: 12%
- I expect to do so in 2022: 5%
- I expect to continue working remotely full-time on a permanent basis: 13%
- Unsure, my employer has not indicated plans about return to work: 13%

74% Have plans to return onsite for work, at least part time
Two-thirds of respondents want to return to office, at least part time

Preferences on Returning to Work (% of respondents)

- 43% “I prefer to work in a hybrid model”
- 34% “I prefer to work remotely full-time”
- 23% “I prefer to work on-site full-time”
Commuting time and costs rank highest among reasons to work remote

<table>
<thead>
<tr>
<th>Reason</th>
<th>Rank #1</th>
<th>Rank #2</th>
<th>Rank #3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Working remotely saves me commuting time</td>
<td>51%</td>
<td>42%</td>
<td>35%</td>
</tr>
<tr>
<td>I can have a more flexible schedule when I work remotely</td>
<td>35%</td>
<td>33%</td>
<td>28%</td>
</tr>
<tr>
<td>I can be more productive when I am working remotely</td>
<td>33%</td>
<td>28%</td>
<td>23%</td>
</tr>
<tr>
<td>I can dress more casually when working remotely</td>
<td>28%</td>
<td>28%</td>
<td>23%</td>
</tr>
<tr>
<td>Working remotely enables me to better manage home responsibilities</td>
<td>28%</td>
<td>28%</td>
<td>18%</td>
</tr>
<tr>
<td>I find working remotely to be better for my mental state</td>
<td>23%</td>
<td>23%</td>
<td>9%</td>
</tr>
<tr>
<td>My home office is a more comfortable space</td>
<td>23%</td>
<td>23%</td>
<td>9%</td>
</tr>
<tr>
<td>I like the freedom of not being limited by geographic location</td>
<td>18%</td>
<td>18%</td>
<td>9%</td>
</tr>
<tr>
<td>Working remotely enables me to better manage childcare arrangements</td>
<td>9%</td>
<td>9%</td>
<td>9%</td>
</tr>
</tbody>
</table>

(% of respondents who ranked as #1, #2 or #3, base: prefer hybrid or full-time remote work)
Not many employers offer commuter benefits.
We're all ‘Relocating’

The change to hybrid offices

- Fall/Winter 2021 or 2022
- Hybrid Workplace
- Daily Flexible Choice
- Data & Technology
Opportunity for change

As we return to offices,

Think about timing: If organizations continue to deploy “nudge” techniques, they may be more successful if they leverage key moments of change. Because people are more likely to change their commuting behavior when they move or start a new job, or when there is a serious disruption that forces them to temporarily abandon their habits, these are the times when employers could try using behaviorally informed messaging and light-touch incentives. If an organization wanted to rely solely on “nudges,” perhaps it could try reaching out once new employees accept a job at the firm to encourage different commuting habits from the outset.
How are employers changing their benefits?
Employers are switching to daily parking charges

Reduce drive-alone rate by 12-15% in the first year when switching from monthly permits to daily parking charges
Flexible benefits are the new reality...YAY!
Flexibility is needed to support this new commute environment

<table>
<thead>
<tr>
<th>Status Quo Policies</th>
<th>The New Normal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monthly Parking Permits</td>
<td>➤ Moving to Daily Parking permits</td>
</tr>
<tr>
<td>First come, first serve parking</td>
<td>➤ Using Daily Parking reservations to manage demand</td>
</tr>
<tr>
<td>Informal promotion of rideshare/carpool as well as other safe commute options</td>
<td>➤ Customized and flexible subsidies based on employee type, worksite, or benefit offering</td>
</tr>
<tr>
<td>Bike Racks</td>
<td>➤ Offering Rewards for biking, walking, education</td>
</tr>
</tbody>
</table>
Trying to transition to daily parking?

Seattle Cancer Care Alliance (SCCA) was able to:

• Quickly move from monthly parking permits to daily parking charges
• Create a more flexible commute experience for their employees
• Give parking access to more employees, while still encouraging less driving

Webinar – Flexibility is Forever: Future-Proof the Commute

Tuesday, October 26th at 11 am PT

Our research found that commuting time and cost are the top two reasons employees prefer remote work, at least part of the time.

Hear from **Seattle Cancer Care Alliance (SCCA)** about their switch from monthly parking permits to daily charges - the first step in their implementation of flexible commuter benefits to support their hybrid workforce.

- We did a webinar on August 26 with HealthEquity – [recording here](#).
- HealthEquity Flexibility is the Future eBook found [here](#).