COMMUTER CONNECTIONS®
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2016 STATE OF THE COMMUTE

"At-a-Glance" Survey Section

From the Metropolitan Washington DC Region

National Capital Region Transportation Planning Board
Metropolitan Washington Council of Governments

Employer Provided Commuter Assistance Services

This is an "At-a-Glance" section from the 2016 State of the Commute (SOC) Report showing key figures and tables for employer provided commuter assistance services. To view the full report, go to www.commuterconnections.org.

The SOC survey inquired about commute assistance services and benefits that might be offered to employees at their worksites, either by employers or a building management company. Respondents were asked about three types of services:

- Alternative mode support benefits and services
- Flexible work schedules
- Parking facilities and services

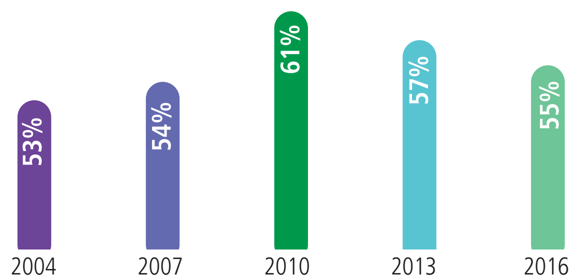
This section presents results regarding respondents' availability and use of these services in 2016. Results also are presented for some questions from previous SOC surveys.

Incentives/Support Services

Slightly less than six in ten (55%) respondents said their employers offered one or more commuter benefits or services. This was essentially the same rate as for 2013 (57%), and 2007 (54%), and 2004 (53%). But it represented a drop from the 2010 result, suggesting that employers that cut back the services during the economic recession had not yet re-introduced those services.

Employee Reports Access to Any Worksite Incentive Support Services – 2004, 2007, 2010, 2013, 2016

(2004 n = 6,866, 2007 n = 6,071, 2010 n = 5,899, 2013 n = 5,524, 2016 n = 5,086)

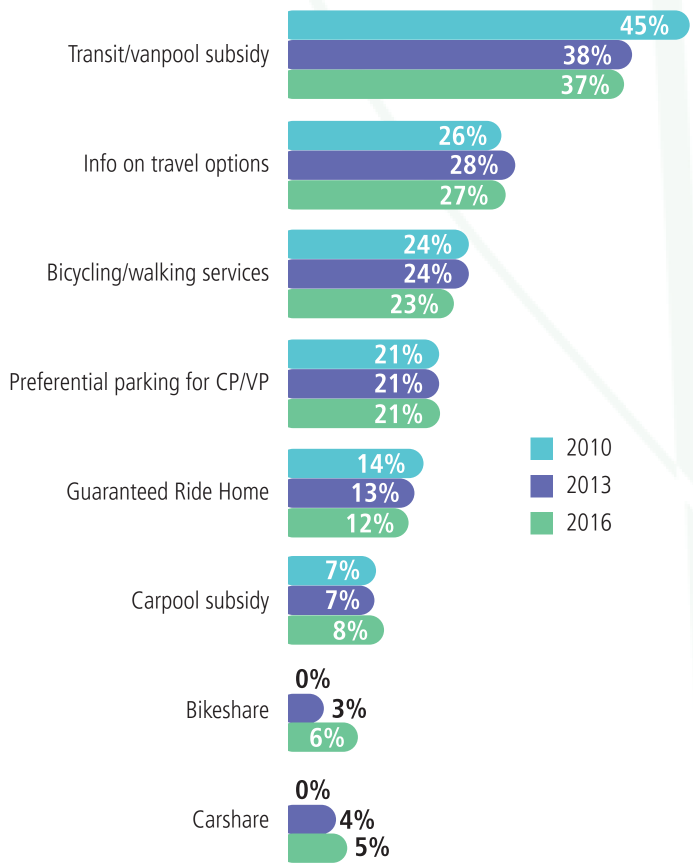


Individual Incentives/Support Services Offered

The percentages for individual commute services offered are shown in the next figure. A third (32%) of respondents said their employers offer one or two of these services, 23% said their employers offer three or more of the services.

Alternative Mode Benefits/Services Available at Worksites – 2010, 2013, 2016

(2010 n = 5,899, 2013 n = 5,524, 2016 n = 5,086)

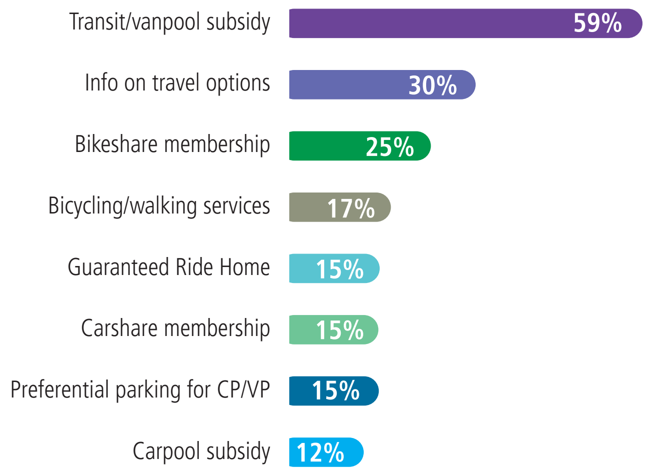


Availability of most services was about the same in 2016 as in 2013 and in 2010. However, access to transit/vanpool subsidies fell between 2010 and 2013. As this service represents the largest cost commitment for most employer commute programs, it reinforces the conclusion that employers that stopped offering commute assistance services could have done so to reduce costs.

Respondents whose employers offered incentives/support services were asked if they had ever used these services. Overall, 51% of respondents who said commute services were available had used a service. This percentage represented 29% of all workers who were not self-employed.

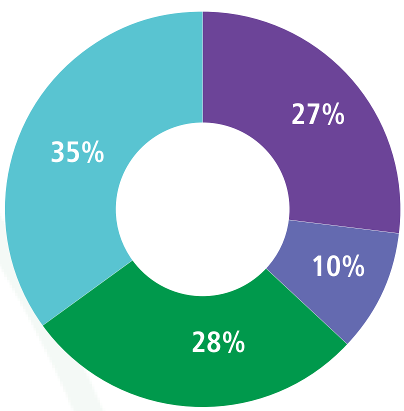
Use of Employer-Provided Incentives/Support Services of Employees Who had Access to Services

(Transit/vanpool subsidy n = 1,962, Information on travel options n = 1,425, Bikeshare membership n = 291, GRH n = 643, Bicycling/walking services n = 1,284, Carshare membership n = 226, Preferential parking n = 1,078, Carpool subsidy n = 407)



Transit Financial Benefit Types

(n = 1,967)



Benefits/Services Offered by Employer Type

- Employer-paid direct cash payment
- SmarTrip card, travel voucher
- Don't know
- Pre-tax deduction (employee paid)

Incentives/Support Services Offered by Employer Type

Respondents who worked for Federal agencies were most likely to report availability of benefits/services at their worksites; 84% of Federal workers said they had at least one of these services. About six in ten (57%) respondents who worked for non-profit organizations had access to services. Respondents who worked for private employers and state/local agencies were least likely to have access; fewer than half of respondents who worked for these types of employees had access to commuter benefits/services.

The next table compares the percentages of employers that offered various services by employer type. Not surprisingly, Federal agency workers also had greater access than did other respondents to individual services. This was especially true for transit/vanpool subsidies; 73% of Federal workers said subsidies were offered, while only 42% of non-profit workers and about one-quarter of respondents who worked for private firms and state/local agencies had this benefit.

Commuter Benefits/Services Available by Employer Type

	Employer Type			
Incentives/Support Services	**Federal** (n = 1,317)	**Non-profit** (n = 626)	**State/local** (n =682)	**Private** (n = 2,168)
Any services offered	**84%**	**57%**	**45%**	**44%**
SmartBenefit/transit/VP subsidy	73%	42%	25%	22%
Commute information	48%	24%	25%	19%
Bike/walk services	43%	24%	14%	15%
Preferential parking	47%	11%	14%	12%
GRH	15%	13%	8%	11%
Carpool subsidy/cash payment	18%	4%	4%	5%
Capital Bikeshare	10%	7%	7%	3%
Carshare (Zipcar, car2go)	6%	7%	6%	4%

Commuter Services Offered by Employer Size

Large employers were more likely to offer commuter services than were small employers. The next table shows that only 38% of respondents who worked for employers with 100 or fewer employees and 54% of respondents who worked for employers with 101-250 employees said they had any services. By contrast, three-quarters (75%) of respondents employed by large (251-999 employees) employers and nearly eight in ten (79%) respondents who worked for very large firms (1,000+ employees) had one or more employer-provided commuter service.

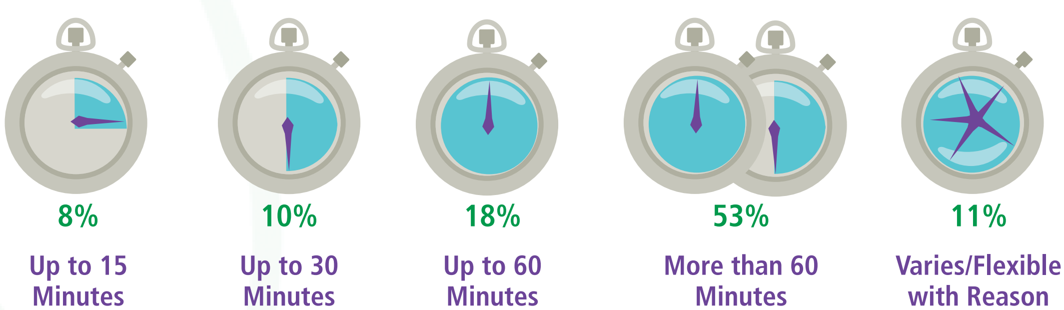
The table also compares availability of individual commuter assistance services by employer size.

Commuter Benefits/Services Available by Employer Size (number of employees)

	Employer Size			
Incentives/ Support Services	**1-100** (n = 2,089)	**101-250** (n = 640)	**251-999** (n = 779)	**1,000+** (n = 1,269)
Any services offered	**38%**	**54%**	**75%**	**79%**
SmartBenefit/transit/VP subsidy	20%	36%	52%	63%
Commute information	14%	24%	39%	48%
Bike/walk services	10%	18%	35%	43%
Preferential parking	8%	13%	29%	44%
GRH	11%	13%	10%	14%
Carpool subsidy/cash payment	3%	7%	10%	16%
Capital Bikeshare	3%	5%	11%	9%
Carshare (Zipcar, car2go)	2%	6%	10%	7%

Extent of Work Schedule Flexibility Permitted

(n = 2,780)



Services Offered by Employer Location

The survey examined availability of services by respondents' work locations, divided into the three "ring" designations: Inner Core (Alexandria, Arlington, and the District of Columbia), Middle Ring (Fairfax, Montgomery, and Prince George's), and Outer Ring (Calvert, Charles, Frederick, Loudoun, and Prince William). Inner Core respondents had greater access to benefits/services than did other respondents. Seven in ten Inner Core workers said they had commute services, while only about half (47%) of Middle Ring workers and 35% of Outer Ring workers had services available.

Commuter Benefits/Services Available by Work Area

	Work Area		
Incentives/Support Services	**Inner Core** (n = 2,276)	**Middle Ring** (n = 1,648)	**Outer Ring** (n = 1,145)
Any services offered	**70%**	**47%**	**35%**
SmartBenefit/transit/VP subsidy	57%	25%	10%
Commute information	32%	26%	16%
Bike/walk services	32%	17%	11%
Preferential parking	23%	21%	13%
GRH	13%	11%	11%
Carpool subsidy/cash payment	10%	7%	5%
Capital Bikeshare	10%	3%	1%
Carshare (Zipcar, car2go)	7%	5%	2%

Flexible Work Schedules and Work Schedule Incentives

Availability of Flexible Work Schedules

Some employers permit employees to work a "flexible" work schedule, in which they can choose their work start and end times, so long as they meet a minimum number of weekly or daily work hours. The survey included several questions to explore the availability and extent of these schedules. Six in ten (60%) commuters said their employers offered at least some degree of work schedule flexibility and 80% of respondents who had access to the schedule had used it.

Parking Facilities and Services

Respondents also were asked about the parking services available at their worksites. These results are displayed for 2013, 2010, 2007, and 2004 in the table to the right.

The majority of respondents (64%) across the region said their employer provided "free parking for all employees" at the worksite. One percent said the employer offered "free parking off-site." An additional 6% of respondents said their employer did not provide free parking to all employees, but that they personally had free parking. This follow-up question was not asked prior to the 2016 survey, so no data were available for previous years.

Parking Facilities/Services Offered by Employers – 2016, 2013, 2010, 2007, 2004

Parking Facilities and Services	2016 SOC (n =5,093)	2013 SOC (n 5,5254)	2010 SOC (n =5,819)	2007 SOC (n =5,426)	2004 SOC (n =)
Free on-site parking (all employees)	64%	63%	63%	65%	66%
Free off-site parking (some employees)*	6%	——	——	——	——
Free off-site parking	1%	2%	2%	4%	3%
Employee pays all parking charges	24%	23%	22%	21%	21%
Employee/employer share parking charge	5%	7%	7%	7%	6%
Parking discounts for CP/VP**	14%	14%	16%	15%	14%

* Follow-up question about parking offered to some employees was added in 2016

** Percentages of parking discounts for CP/VP are calculated on a base of respondents who do not have free parking available. These sample sizes are (2016 n = 1,148; 2013 n = 1,438; 2010 n = 1,610; 2007 n = 1,674; 2004 n = 1,752)

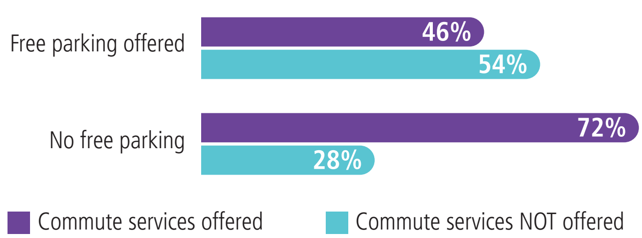
About three in ten said they paid at least part of the cost of parking; 24% paid the total cost and 5% paid a portion of the cost with the balance paid by their employer. The availability of free parking has remained relatively stable over the past 12 years.

Availability of Commuter Assistance Services/ Benefits Offered by Availability of Free Parking

The availability of commute benefits/services was inversely related to the availability of free parking at the worksite. As shown in this figure below.

Commuter Benefits/Services Offered by Free Parking Available

(Free parking available n = 3,136, NO free parking n = 1,830)



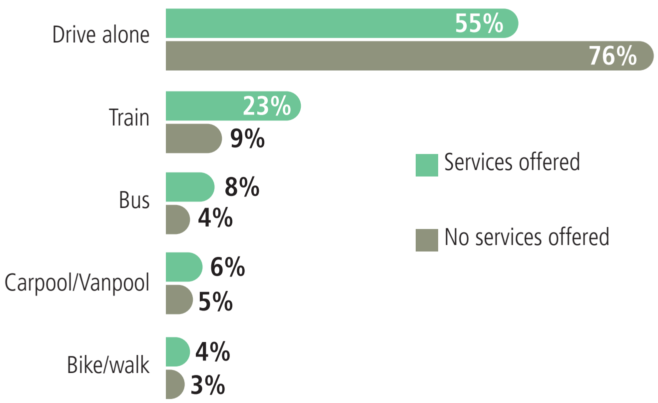
Impact of Commute Assistance Services and Parking

Commute Mode by Commute Assistance Benefits/Services Offered

The next figure presents the share of commuters who used various commute modes by whether or not commute assistance benefits/services were available at their worksites.

Primary Commute Mode by Commute Benefits/ Services Offered

(Services offered n = 2,909, Services not offered n = 2,152)

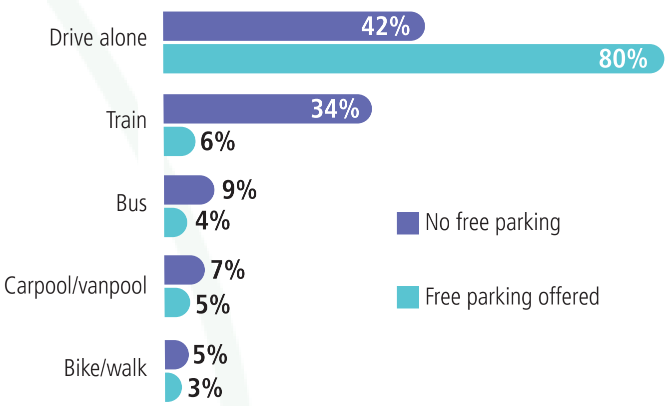


Commute Mode by Parking Services Offered

The next figure shows a comparison of mode use rates for respondents who had free on-site parking at work and those who had to pay for parking. The difference in drive alone rates for these two groups was dramatic; 80% of respondents whose employers offered free parking drove alone, compared with only 42% of respondents who did not have this benefit.

Primary Commute Mode by Free Parking Available at Work

(No free parking n = 1,830, Free parking offered n = 3,138)

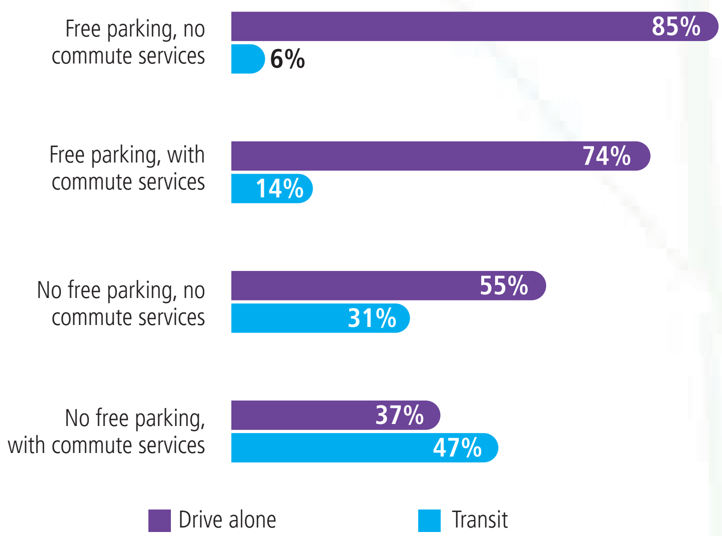


Commute Mode by Commute Benefits/Services and Parking Services in Combination

Finally, this final figure shows a comparison of drive alone and public transit use by the combination of free parking and commute benefits/services. The top section of the figure shows the mode shares at worksites where free on-site parking was offered and commute benefits/services were and were not available. The bottom section shows the mode shares when free parking was not available and commute benefits/services were and were not offered.

Drive Alone and Transit Mode Use by Combination of Free Parking and Commute Benefits/Services Offered

(Free parking, no commute services n = 1,648, Free parking, with commute services n = 1,468) (No free parking, no commute services n = 443, No free parking, with commute services n = 1,383)



The drive alone mode share declined steadily across the four cases, indicating that both parking cost and commute services influenced commuters' choice of driving alone.

The reverse pattern was clear for use of public transit. When free parking was offered, 6% of respondents used public transit when no commute benefits/services were available and 14% used public transit when they had access to commute benefits/services. At worksites where parking was not free, 31% of respondents used transit when they did not have access to commute benefits/services and 47% used transit when commute benefits/services were offered.

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