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2019 STATE OF THE COMMUTE

"AT-A-GLANCE" SURVEY SECTION

FROM THE
WASHINGTON DC
METROPOLITAN REGION

National Capital Region
Transportation Planning Board

Metropolitan Washington
Council of Governments

EMPLOYER-PROVIDED COMMUTER ASSISTANCE SERVICES

National Capital Region
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This is an "At-a-Glance" section from the 2019 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.

Employer-Provided Commuter Assistance Services

The SOC survey also 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 two types of services:

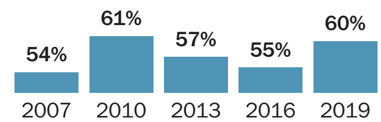
- Alternative mode support benefits and services
- Parking facilities and services

Results presented in this summary are in regards to respondents' availability and use of these services in 2019.

Incentives/Support Services

Six in ten (60%) respondents said their employers offered one or more commuter benefits or services. This was a slight increase over the rates for most past SOC surveys and nearly meeting the 61% rate recorded in 2010. This suggests that commute service cut-backs made by employers during the economic recession years of 2013 and 2016 have been reversed. Note also that these percentages represent employees' perceptions or awareness of service availability. They could under-represent the true availability of services if employees were unaware of some services that actually were offered.

Employee Reports Access to any Worksite Benefits/Services – 2007 to 2019
(2007 n = 6,071, 2010 n = 5,899, 2013 n = 5,524, 2016 n = 5,086, 2019 n = 7,991)



INDIVIDUAL INCENTIVES/SUPPORT SERVICES OFFERED

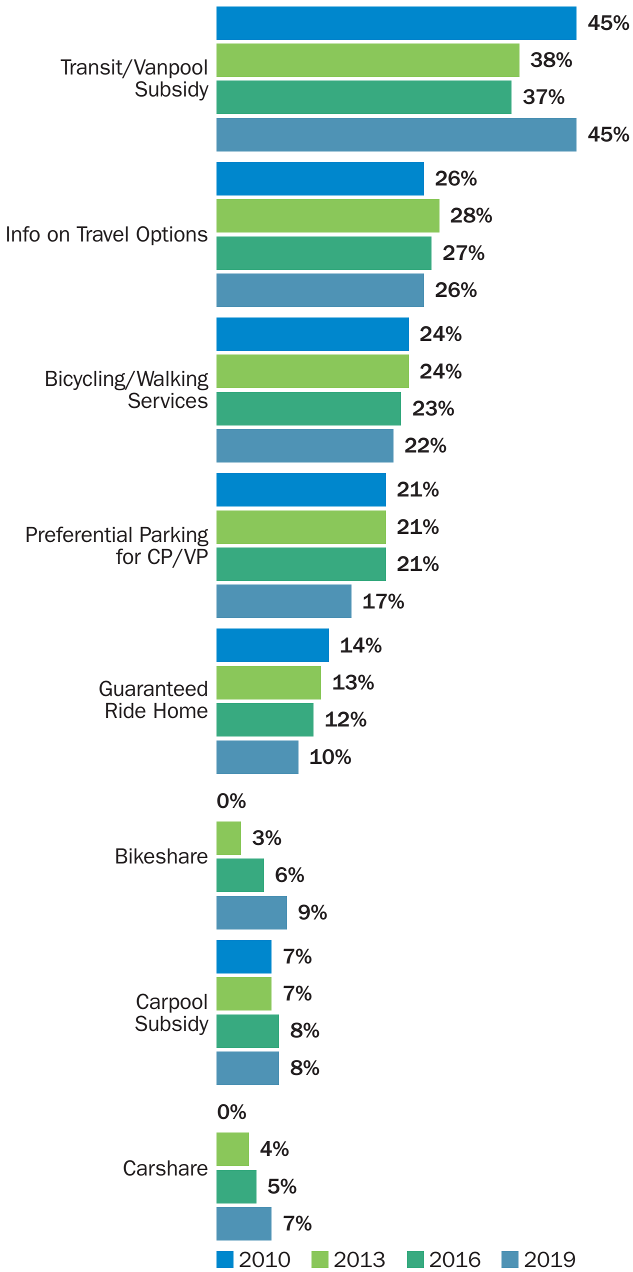
The percentages for individual commute services offered are displayed in the next figure. Thirty-seven percent of respondents said their employers offered one or two of these services and 22% said their employers offered three or more services.

The most commonly offered services were transit (SmarTrip)/vanpool subsidies available to 45% of respondents, and information on commuter transportation options, available to 26% of respondents. Two in ten (22%) respondents said their employer offered services for bikers and walkers and 17% said preferential parking was offered to carpools and vanpools. One in ten (10%) said their employer offered Guaranteed Ride Home (GRH). Carpool subsidies were mentioned by about 8% of employees. Two vehicle-sharing services, bikeshare and carshare membership, were mentioned by 9% and 7% of respondents, respectively.

Availability of most services was not significantly different in 2019 than in past SOC survey years. However, access to transit/vanpool subsidies increased by eight percentage points between 2016 and 2019, reversing a declining trend noted in 2013 and 2016. As this service can represent a sizeable cost commitment for employer commute programs, it reinforces the hypothesis that employers cut back on commute assistance services during the recession to save money and have now restarted some elements of the program. Availability of carshare and bikeshare, two services added to the SOC questionnaire in 2013, continued to grow. Availability of employer-sponsored GRH has shown a slight, but consistent, decline since 2010. Availability of preferential parking for carpools and vanpools also fell between 2016 and 2019, from a level that had been consistent since 2010.

Alternative Mode Benefits/Services Available at Worksites – 2010 to 2019

(2010 n = 5,899, 2013 n = 5,524, 2016 n = 5,086, 2019 n = 7,991)



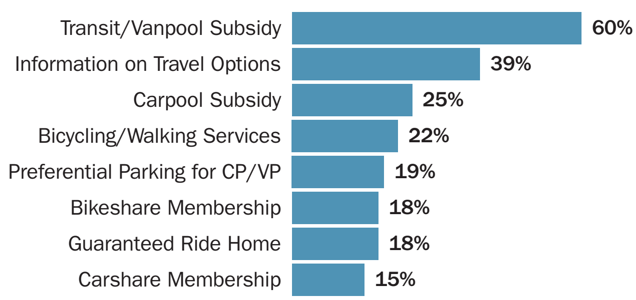
Respondents whose employers offered incentives/support services were asked if they had ever used these services. Overall, 57% of respondents who said commute services were available had used a service. This percentage represented 34% of all workers who were not self-employed.

The most commonly used benefit or service was transit or vanpool subsidies, used by 60% of respondents whose employers offered this service. Four in ten (39%) respondents who had access to commute information had used it and carpool subsidy was used by 25% who said it was available. About two in ten respondents whose employers offered bicycling or walking services (22%), preferential parking (19%), bikeshare membership (18%), and GRH (18%) had used these services. Fifteen percent of respondents had used a carshare membership when it was offered.

Use of Employer-Provided Benefits/Services

Of Employees Who had Access to Services

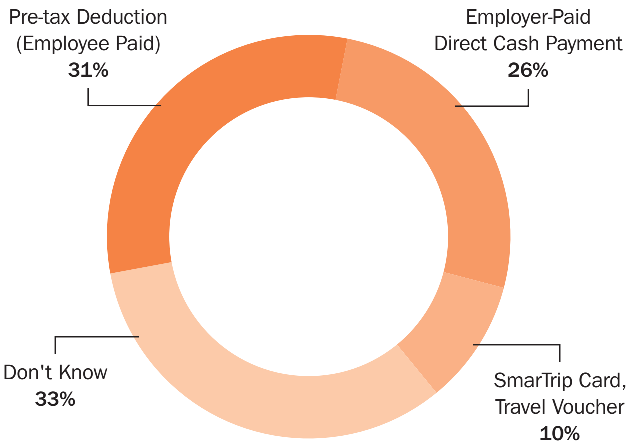
(Transit/vanpool subsidy n = 3,568, Information on travel options n = 2,158, Carpool subsidy n = 639, Bicycling / walking services n = 1,928, Preferential parking n = 1,460, Bikeshare membership n = 7081, GRH n = 852, Carshare membership n = 471)



Form of Transit Financial Benefits – As indicated above, transit/vanpool financial benefits were both available to and used by a large share of respondents. Respondents who said their employer offered this benefit were asked about the form in which it was provided. The most common form was an employee-paid pre-tax deduction program, in which employees have the monthly cost of their transit cost deducted from their pay before taxes are deducted, reducing the amount of the tax they pay; 31% of respondents reported this type of benefit.

About one-quarter (26%) of respondents said it was a direct cash payment or employer-paid SmartBenefits account. In this form, the employee receives the full cost of the benefit, either as an upfront payment or reimbursement for transit costs paid, as a non-taxed addition to their pay. Ten percent reported that the employer offered SmarTrip cards or travel vouchers. One-third (33%) said they knew a financial benefit was available, but did not know the specific type of benefit.

Transit Financial Benefit Types
(n = 3,556)



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; 85% of Federal workers said they had at least one of these services. Two-thirds (66%) of 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; only half (50%) of state/local government employees and 44% of private sector employees reported access to commuter benefits/services.

Commuter Benefits/Services Available by Employer Type

INCENTIVES/SUPPORT SERVICES	EMPLOYER TYPE			
	FEDERAL (n = 2,421)	NON-PROFIT (n = 1,147)	STATE/LOCAL (n = 845)	PRIVATE (n = 3,390)
ANY SERVICES OFFERED	85%	66%	50%	44%
SmartBenefit/transit/vanpool subsidy	75%	51%	30%	29%
Commute information	43%	26%	29%	18%
Bike/walk services	36%	29%	23%	14%
Preferential parking	38%	12%	18%	8%
GRH	17%	8%	11%	6%
Carpool subsidy/cash payment	15%	6%	11%	5%
Capital Bikeshare	12%	10%	18%	6%
Carshare (Zipcar, car2go)	8%	8%	12%	5%

Commuter Benefits/Services Available by Employer Size

INCENTIVES/SUPPORT SERVICES	EMPLOYER SIZE (NUMBER OF EMPLOYEES			
	1-100 (n = 2,890	101-250 (n = 994	251-999 (n =1,353)	1,000+ (n = 2,081
ANY SERVICES OFFERED	40%	60%	72%	83%
SmartBenefit/transit/vanpool subsidy	28%	44%	55%	67%
Commute information	14%	25%	31%	47%
Bike/walk services	12%	22%	30%	38%
Preferential parking	7%	12%	19%	38%
GRH	6%	9%	11%	18%
Carpool subsidy/cash payment	5%	9%	9%	15%
Capital Bikeshare	5%	11%	11%	16%
Carshare (Zipcar, car2go)	6%	6%	8%	11%

Not surprisingly, Federal agency workers also had greater access than did other respondents for most individual services. This was especially true for transit/vanpool subsidies: 75% of Federal workers said subsidies were offered, while only 51% of non-profit workers and three in ten private firms and state/local agencies reported this benefit. The high availability of transit subsidies among Federal agency employees is due to federal mandate: an Executive Order signed in 2000 required Federal agencies in the National Capital Region to offer transit subsidies; in 2019 the maximum amount was $265/month. Most other benefits/services were disproportionately available to Federal agency workers.

COMMUTER SERVICES OFFERED BY EMPLOYER SIZE

Large employers were more likely to offer commuter services than were small employers. Only 40% of respondents who worked for employers with 100 or fewer employees and 60% of respondents who worked for employers with 101-250 employees said they had any services. By contrast, 72% of respondents employed by large employers (251-999 employees) and 83% of respondents who worked for very large employers (1,000+ employees) had one or more employer-provided commuter service.

The table above compares availability of individual commuter assistance services by employer size. Respondents who worked for employers with 251 or more employees had greater access to most benefits/services, compared with employees of smaller firms. This trend of increasing services with increasing size was most striking with transit/vanpool subsidies, commute information, bike/walk services, and preferential parking.

BENEFITS/SERVICES OFFERED BY EMPLOYER LOCATION

Finally, the analysis examined availability of services by respondents' work locations, divided into the three "ring" designations described earlier: 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. Three-quarters (76%) of Inner Core workers said they had commute services, while only about half (51%) of Middle Ring workers and 28% of Outer Ring workers had services available.

Commuter Benefits/Services Available by Work Area

INCENTIVES/SUPPORT SERVICES	WORK AREA		
	INNER CORE (n = 3,815)	MIDDLE RING (n = 2,785)	OUTER RING (n = 1,332)
ANY SERVICES OFFERED	**76%**	**51%**	**28%**
SmartBenefit/transit/vanpool subsidy	66%	34%	12%
Commute information	32%	27%	13%
Bike/walk services	31%	20%	11%
Preferential parking	18%	20%	11%
GRH	12%	9%	7%
Carpool subsidy/cash payment	10%	9%	6%
Capital Bikeshare	15%	7%	3%
Carshare (Zipcar, car2go)	9%	6%	4%

The higher share of Inner Core workers with commute services was primarily due to their much greater access to transit subsidies; 66% of Inner Core workers reported this service was offered, while only 34% of Middle Ring and 12% of Outer Ring workers said it was available. This largely mirrors the availability of transit service; employers in areas with limited transit operating would understandably be less inclined to offer this service. The high availability of transit subsidies in the Inner Core also reflects the concentration of federal agencies, with their required subsidy offerings, in this area.

Another factor that could influence access to transit subsidies in the Inner Core is the DC Commuter Benefits Ordinance enacted by the District of Columbia government. Beginning in 2016, employers with 20 or more employees at District worksites were required to offer some form of transit benefit. The 66% share of Inner Core employees who said a transit benefit was offered was nine percentage points higher than the 57% reported in 2016. But Middle Ring employees reported a similar nine-point jump in transit subsidy availability from 2016 to 2019 (25% in 2016 to 34% in 2019), so it is not definitive that the ordinance was responsible for the growth.

Inner Core workers also had substantially higher access to bike/walk services and to Capital Bikeshare, reflecting the prevalence and density of these service offerings in the Inner Core area.

Differences in access to other commute services were less pronounced, particularly between Inner Core and Middle Ring workers. The percentages of Inner Core and Middle Ring workers with access to commute information, preferential parking, GRH, carpool subsidies, and carshare memberships were similar. Outer Ring workers had lower availability of all services than did commuters who worked closer to the region's urban center.

Parking Facilities and Services

Respondents also were asked about the parking services available at their worksites. The majority of respondents (60%) across the region said their employers provided "free parking to all employees" at the worksite. One percent said the employer offered "free parking off-site." An additional 5% of respondents said their employers 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.

About one-third said they paid at least part of the cost of parking; 28% paid the total cost and 5% paid a portion of the cost with the balance paid by their employers. The availability of free parking has remained relatively stable over the past 12 years.

Parking by Work Location, Employer Type, and Employer Size – The most dramatic differences in availability of free parking were noted for respondents who worked in different parts of the region. Only one-quarter (23%) of Inner Core workers said their employers offered free parking to all employees, compared with eight in ten (80%) respondents who worked in the Middle Ring and 84% of respondents who worked in the Outer Ring.

Parking Facilities/Services Offered by Employers – 2007 to 2019

(2007 n = 5,426, 2010 n = 5,819, 2013 n = 5,524, 2016 n = 5,093, 2019 n = 7,385)

PARKING FACILITIES AND SERVICES	2007	2010	2013	2016	2019
Free on-site parking (all employees)	65%	63%	63%	64%	60%
Free on-site parking (some employees)*	—	—	—	6%	5%
Free off-site parking	4%	2%	2%	1%	1%
Employee pays all parking charges	21%	22%	23%	24%	28%
Employee/employer share parking charge	7%	7%	7%	5%	5%
Parking discounts for carpools/vanpools**	15%	16%	14%	14%	9%

* 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 did not have free parking. These sample sizes are (2007 n = 1,674, 2010 n = 1,610, 2013 n = 1,438, 2016 n = 1,148, 2019 n = 1,934)

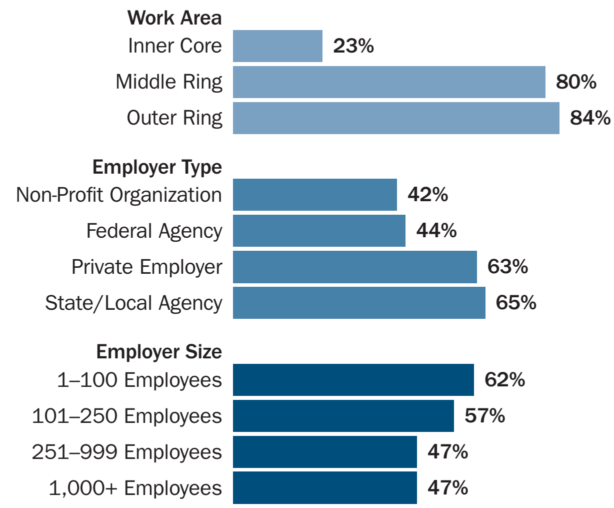
Federal agency workers (44%) and respondents who worked for non-profit organizations (42%) also were least likely to have free parking at work. By contrast, 65% of respondents who worked for state and local agencies and 63% of private sector employees said they had free parking. Note that many federal agency worksites and non-profit worksites are located in the Inner Core, where parking availability of all kinds is generally less than outer regions; this fact could contribute to the parking availability by employer type. Respondents who worked for large employers were less likely to have free parking. Less than half of respondents who were employed by employers with 251 or more employees had free parking, compared with about six in ten respondents who worked for employers with 250 or fewer employees.

On-site Free Parking Availability by Work Area, Employer Type, and Employer Size

(Work Area – Inner Core n = 3,815, Middle Ring n = 2,785, Outer Ring n = 1,333)

(Employer Type –Non-profit n = 1,147, Federal n = 2,241, Private n = 3,391, State/local n = 845)

(Employer Size – 1-100 n = 2,974, 101-250 n = 1,034, 251-999 n = 1,415, 1,000+ n = 2,174)

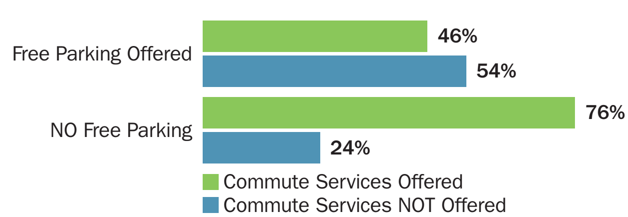


AVAILABILITY OF COMMUTER ASSISTANCE SERVICES/BENEFITS OFFERED BY AVAILABILITY OF FREE PARKING

The availability of commute benefits/services was inversely related to the availability of free parking at the worksite. As shown in the next figure, less than half (46%) of respondents who said free parking was offered to all employees said their employers also offered commute benefits/services that would encourage or help them use alternative modes for commuting. By contrast, 76% of respondents who said free parking was **not** available reported having access to commute benefits/services at work.

Commute Benefits/Services Offered by Free Parking Available

(Free parking available n = 4,471, No free parking n = 3,520)

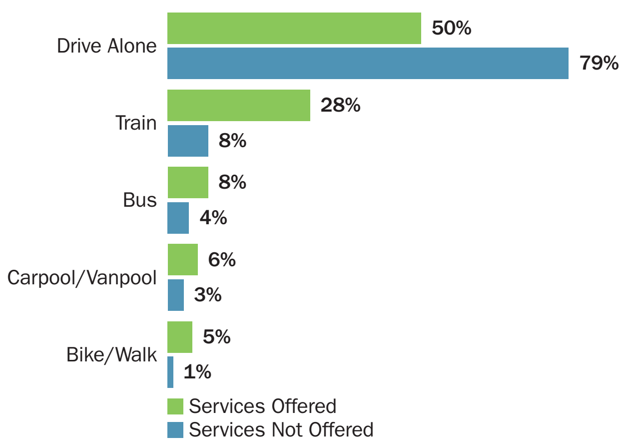


Impact of Commute Assistance Services and Parking

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. A much lower share of respondents who had access to alternative mode benefits/services drove alone (50%), when compared with respondents whose employers did not provide these services (79%).

Primary Commute Mode by Commute Benefits/Services Offered
(Services offered n = 4,696, Services not offered n = 3,295)



Train use was particularly higher for respondents with commute services; 28% of respondents whose employers offered commute benefits/services rode the train to work, compared with 8% of respondents whose employers did not offer these services. Use of other alternative modes also was about twice as high among respondents who had access to commute benefits/services as for respondents with no services.

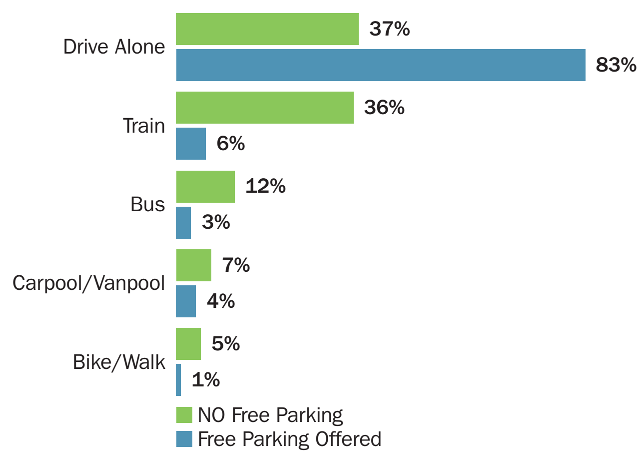
While all the differences shown in the figure are statistically significant, it is not possible to say that the availability of these services was the only reason, or even the primary reason, for differences in mode use. Employers in the Inner Core were much more likely than were employers in the Middle Ring and Outer Ring to offer commuter assistance services and drive alone rates were much lower for respondents who worked in the Core (38%) than for respondents who worked in either the Middle Ring (78%) or Outer Ring (87%).

However, respondents who worked in the Inner Core also could be faced with greater impediments to driving alone. For example, Inner Core workers commuted an average of 47 minutes one-way, compared with 39 minutes for Middle Ring and Outer Ring workers. And respondents who worked in the Inner Core also might experience greater congestion levels and have greater availability of commute options, such as transit, than would be experienced by workers outside this area. Any of these factors might have been at least as important in influencing respondents' commute mode choices as what benefits employers offer.

COMMUTE MODE BY PARKING SERVICES OFFERED

The figure below compares mode use rates for respondents who had free on-site parking at work and those who pay or would have to pay for parking. The difference in drive alone rates for these two groups was dramatic; 83% of respondents whose employers offered free parking drove alone, compared with only 37% of respondents who did not have this benefit.

Primary Commute Mode by Free Parking Available at Work
(No free parking n = 3,520, Free parking offered n = 4,472)



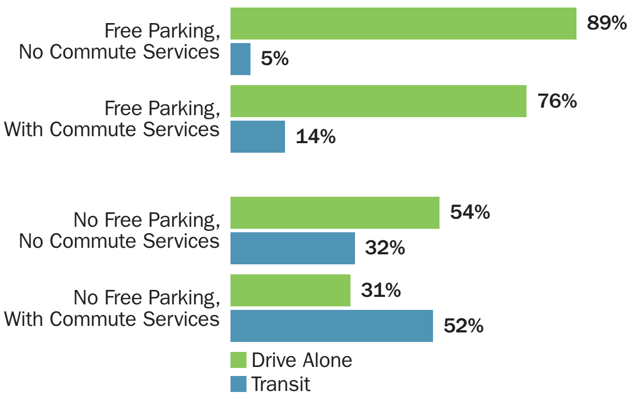
Respondents who had to pay to park used all alternative modes at higher rates than did respondents with free parking. The difference was especially striking for use of transit; train mode share was more than five times as high for respondents who had to pay to park as for respondents who had free parking. Use of bus, carpool/vanpool, and bike/walk also were higher for respondents who did not have free parking. Many other surveys and research studies have documented the important roles that parking availability and cost play in commute decisions.

COMMUTE MODE BY COMMUTE BENEFITS/SERVICES AND PARKING SERVICES IN COMBINATION

Finally, the figure below presents 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 Use by Combination of Free Parking and Commute Benefits/Services Offered

(Free parking, no commute services n = 2,456, Free parking, with commute services n = 2,009)
(No free parking, no commute services n = 834, No free parking, with commute services n = 2,681)



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. When parking was free and commute services were not offered, 89% of respondents drove alone to work. The drive alone rate dropped to 76% among respondents who had free parking, but when commute services were added.

When no free parking was available, the drive alone rate was just 54% even when no commute services were offered. This was fully 35 percentage points below the rate when parking was free and commute services were not offered, suggesting that parking charges can have a substantial impact on drive alone mode share, even in the absence of commute services. But when commute services were added, on top of parking charges, the drive alone mode share fell an additional 23 percentage points, to 31%, indicating that commute services also play a motivating role in commute mode choice.

The reverse pattern was clear for use of public transit. When free parking was offered, 5% of respondents used transit when no commute benefits/services were available and 14% used transit when they had access to commute benefits/services. At worksites where parking was not free, the transit share was 32% among respondents who did not have access to commute benefits/services and 52% when commute benefits/ services were offered.

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