2022

STATE OF THE COMMUTE

"AT-A-GLANCE" SURVEY SECTION

FROM THE
WASHINGTON DC
METROPOLITAN
REGION

COMMUTER CONNECTIONS®
A SMARTER WAY TO WORK

EMPLOYER-PROVIDED COMMUTE ASSISTANCE SERVICES

THIS IS AN "AT-A-GLANCE" SECTION FROM THE 2022 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 COMMUTE 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:

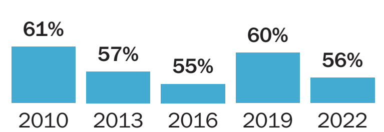
- Alternative mode support benefits and services
- Parking facilities and services

Results provided in this summary are in regards to availability and use of these services in 2022..

Incentives/Support Services

Fifty-six percent of respondents said their employers offered one or more commuter benefits or services. This was a decrease from the rate estimated in the 2019 survey and approximately the same percentage estimated in the 2016 survey. This could suggest some employers paused or discontinued commute services because many employees were working from home during the pandemic. However, the percentage represents employees' perceptions or awareness of service availability and could under-represent the true availability of services if employees were unaware of some services that were offered. While incorrect perceptions could have been an issue in both the current and past SOC surveys, the fact that many employees in the 2022 survey were working some or all their workdays at home could have limited their exposure to information or messaging they might have received if they were working at their usual work location.

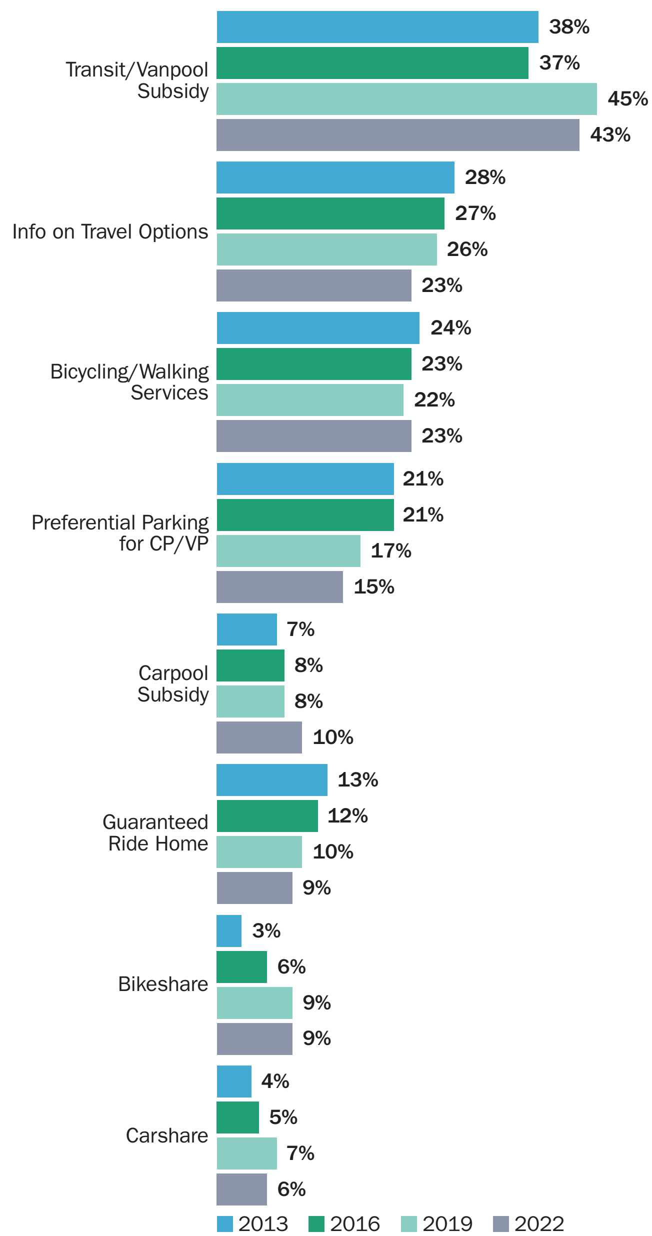
Employee Reports Access to any Worksite Benefits/Services – 2010 to 2022
(2010 n = 5,899, 2013 n = 5,524, 2016 n = 5,086, 2019 n = 7,991, 2022 n = 7,859)



INDIVIDUAL BENEFITS/SERVICES OFFERED

The percentages for individual commute services offered are displayed in the figure below. The most common services were SmarTrip/other subsidies for transit or vanpool, available to 43% of respondents, and information on commuter transportation options, available to 23% of respondents. Two in ten (23%) respondents said their

Alternative Mode Benefits/Services Available at Worksites – 2013 to 2022
(2010 n = 5,899, 2013 n = 5,524, 2016 n = 5,086, 2019 n = 7,991, 2022 n = 7,859)



employer offered services for bikers and walkers and 15% said preferential parking was offered to carpools and vanpools. One in ten said their employer offered carpool subsidies (10%) and GRH (9%). Memberships in two vehicle-sharing services, bikeshare membership and carshare membership, were mentioned by 9% and 6% of respondents, respectively.

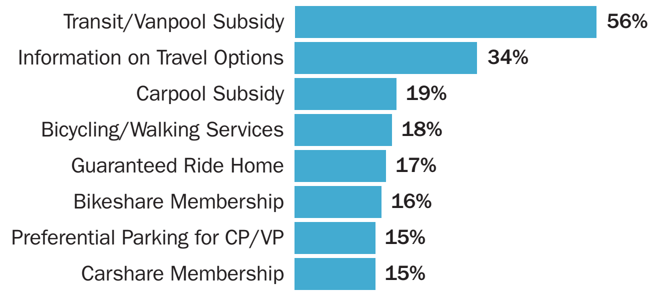
Availability of most services was not significantly different in 2022 than in 2019, typically changing only one or two percentage points. But when examining the service percentages over the years since 2013, the figure shows generally declining trends for information on travel options, preferential parking, and GRH. Conversely, access to carpool subsidies and bikeshare appears to have increased over the nine years since 2013.

Respondents whose employers offered incentives/support services were asked if they had ever used these services. Overall, 54% of respondents who said at least one of the commute services was available had used a service. This percentage represented 30% of all workers who were not self-employed.

The most used benefit or service was transit or vanpool subsidies, used by 56% of respondents whose employers offered this service. One-third (34%) of respondents who had access to commute information had used it and carpool subsidy was used by 19% who said it was available. The remaining services were used by fewer than two in ten respondents whose employers offered the services: bicycling or walking services (18%), GRH (17%), bikeshare membership (16%), preferential parking (15%), and carshare membership (15%).

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

(Transit/vanpool subsidy n = 3,433, Information on travel options n = 1,878, Carpool subsidy n = 771, Bicycling/walking services n = 1,896, Preferential parking n = 1,292, Bikeshare membership n = 744, GRH n = 776, Carshare membership n = 431)

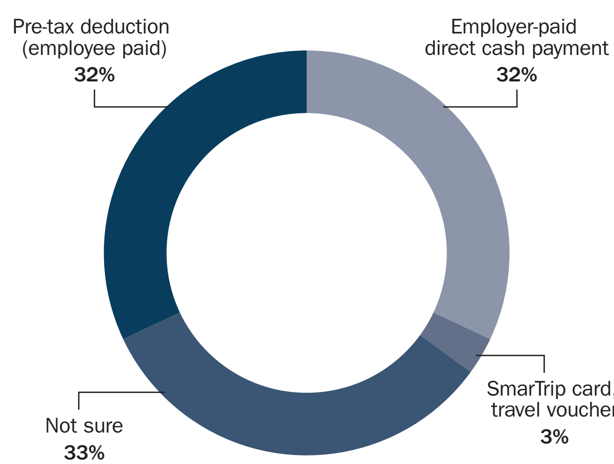


Form of Transit Financial Benefits – Transit/vanpool financial benefits were both available to and used by a large share of respondents. Respondents who said their employer offered this benefit were asked about the form in which it was provided. Two forms of benefits were equally common. One-third (32%) said the benefit 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.

Another one-third (32%) 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. Three 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 = 3,415)



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; 81% of Federal workers said they had at least one of these services. Six in ten (60%) respondents who worked for nonprofit organizations had access to services. Respondents who worked for state/local agencies and private employers were least likely to have access; about half (48%) of state/local government employees and 42% of private sector employees reported access to commuter benefits/services.

Commute Benefits/Services Available by Employer Type

INCENTIVES/SUPPORT SERVICES	EMPLOYER TYPE			
	FEDERAL (N = 2,236)	NON-PROFIT (N = 1,237)	STATE/LOCAL (N = 787)	PRIVATE (N = 3,322)
Any services offered	81%	60%	48%	42%
SmartBenefits/transit/vanpool subsidy	73%	47%	33%	30%
Commute information	40%	21%	26%	16%
Bike/walk services	37%	28%	23%	16%
Preferential parking	33%	11%	12%	10%
GRH	15%	6%	11%	7%
Carpool subsidy/cash payment	18%	7%	7%	8%
Bikeshare membership	10%	10%	19%	7%
Carshare membership	7%	6%	9%	5%

The table also compares the percentages of employers that offered various individual 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 47% of nonprofit workers, 33% of state/local agency employees, and 30% who worked for private firms had this benefit. High availability of transit subsidies among Federal agency employees is due to a Federal mandate; an Executive Order signed in 2000 required Federal agencies in the National Capital Region to offer transit subsidies. In 2022, the maximum subsidy amount was $280 per month.

COMMUTER SERVICES OFFERED BY EMPLOYER SIZE

Large employers were more likely to offer commuter services than were small employers. Only 38% of respondents who worked for employers with 100 or fewer employees and 55% who worked for employers with 101-250 employees said they had any services. By contrast, 67% of respondents employed by large employers (251-999 employees) and 76% of respondents who worked for very large firms (1,000+ employees) had one or more employer-provided commuter service.

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.

Commute Benefits/Services Available by Employer Size

INCENTIVES/SUPPORT SERVICES	EMPLOYER SIZE (NUMBER OF EMPLOYEES)			
	1-100 (N = 2,883)	101-250 (N = 1,012)	251-999 (N = 1,282)	1,000+ (N = 2,062)
Any services offered	38%	55%	67%	76%
SmartBenefits/transit/vanpool subsidy	28%	43%	56%	62%
Commute information	12%	22%	31%	38%
Bike/walk services	12%	23%	32%	38%
Preferential parking	7%	11%	17%	31%
GRH	6%	9%	11%	14%
Carpool subsidy/cash payment	7%	10%	12%	15%
Bikeshare membership	7%	10%	12%	12%
Carshare membership	4%	6%	8%	7%

BENEFITS/SERVICES OFFERED BY EMPLOYER LOCATION

Finally, the analysis examined availability of services by respondents' work locations, divided into the three "ring" designations. Core area respondents had greater access to benefits/services than did other respondents.

Commute Benefits/Services Available by Work Area

INCENTIVES/SUPPORT SERVICES	WORK AREA		
	CORE (N = 3,861)	MIDDLE RING (N = 2,621)	OUTER RING (N = 882)
Any services offered	72%	46%	28%
SmartBenefits/ transit/VP subsidy	64%	31%	14%
Commute information	29%	22%	11%
Bike/walk services	32%	20%	12%
Preferential parking	16%	19%	6%
GRH	11%	9%	7%
Carpool subsidy/cash payment	11%	10%	8%
Bikeshare membership	14%	7%	5%
Carshare membership	7%	6%	4%

Seven in ten (72%) Core area workers said they had commute services while only 46% of Middle Ring workers and 28% of Outer Ring workers had services available. Availability of services as reported in 2022 was lower than in 2019 for the Core (2022 72%, 2019 76%) and the Middle Ring (2022 46%, 2019 51%). Overall service availability for the Outer Ring was the same for both years (2022 28%, 2019 28%).

The higher share of Core area workers with commute services was primarily due to their much greater access to transit subsidies; 64% of Core area workers reported this service was offered while only 31% of Middle Ring and 14% of Outer Ring workers said it was available. This largely mirrors the availability of transit service; employers in areas with limited transit operation would understandably be less inclined to offer a subsidy for transit. The high availability of transit subsidies in the Core also reflects the concentration of Federal agencies in this area. As noted earlier, Federal agencies in the National Capital Region are required to offer transit subsidies to employees.

Another factor that could influence access to transit subsidies in the 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 a transit benefit. The 64% share of Core area employees who said a transit benefit was offered was seven percentage points higher than the 57% reported in 2016. But Middle Ring employees reported about the same jump in subsidy availability (25% in 2016 to 31% in 2022), so it is not definitive that the ordinance was responsible for the growth.

Core area workers also had much greater access to bike/walk services and to bikeshare memberships. Again, this difference reflects the greater access to bike/walk infrastructure and to bikeshare services in the Core when compared with the Middle Ring and Outer Ring. Differences in access to other commute services were less pronounced, particularly between Core area and Middle Ring workers. The percentages of Core area 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 who were traveling to an outside worksite at least one day per week also were asked about the parking available at their worksites. These results are displayed below for 2010 through 2022. Nearly seven in ten (69%) respondents across the region said their employers provided "free parking to all employees" at the worksite. One percent said the employer offered "free parking offsite" and 6% said their employers did not provide free parking to all employees, but that they personally had free parking. About one-quarter said they paid at least part of the cost of parking; 22% paid the total cost and 3% paid a portion of the cost with the balance paid by their employers.

Parking Facilities/Services Offered by Employers – 2010 to 2022

(2010 n = 5,819, 2013 n = 5,524, 2016 n = 5,093, 2019 n = 7,385, 2022 n = 7,196)

PARKING FACILITIES AND SERVICES	2010	2013	2016	2019	2022
Free onsite parking (all employees)	63%	63%	64%	60%	69%
Free onsite parking (some employees)*	—	—	6%	5%	6%
Free offsite parking	2%	2%	1%	1%	1%
Employee pays all parking charges	22%	23%	24%	28%	22%
Employee/employer share parking charge	7%	7%	5%	5%	3%
Parking discounts for carpools/vanpools**	16%	14%	14%	9%	6%

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

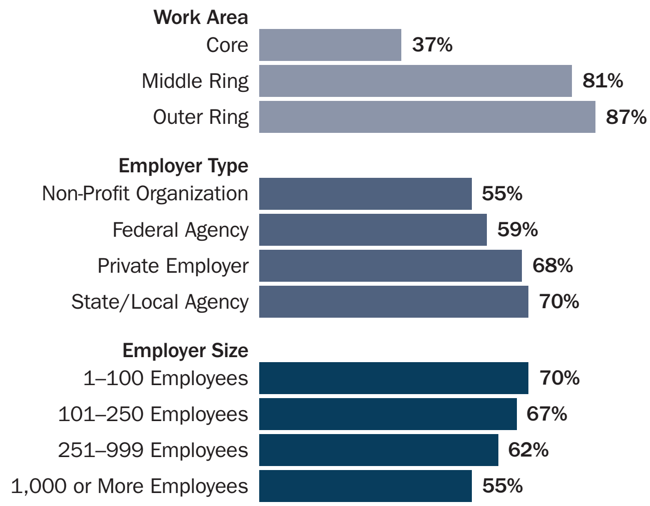
** Percentages of parking discounts for CP/VP are calculated on a base of respondents who did not have free parking. These sample sizes are (2010 n = 1,610, 2013 n = 1,438, 2016 n = 1,148, 2019 n = 1,934, 2022 n = 1,530).

The availability of free parking remained relatively stable between 2010 and 2019 but increased between 2019 and 2022; the increase could reflect several factors. First, workers who were teleworking full-time were not asked this question and, as noted earlier, a greater share of Core area workers shifted to full-time telework during the pandemic than did Middle Ring and Outer Ring workers. Because free parking was always more available for Middle Ring and Outer Ring workers, greater regional availability of free parking could reflect a different mix of respondents working at outside locations in 2022, with a higher share of Middle Ring and Outer Ring workers reporting on parking in the survey.

A second possibility is that some employers might have started offering free parking to encourage remote workers to return to the main work location. To test this possibility, the 2022 survey asked respondents who had free worksite parking if it was free before the pandemic. Most (92%) said it had been free pre-pandemic but 4% said it was not free before. The remaining 4% were not sure. Core area workers were more likely to note newly-free parking; 8% of Core workers with free parking said it was not free before the pandemic, compared with 3% of Middle Ring and 1% of Outer Ring workers.

Onsite Free Parking Availability by Work Area, Employer Type, and Employer Size

(Work Area – Core n = 2,320, Middle Ring n = 1,876, Outer Ring n = 729)
(Employer Type – Nonprofit n = 829, Federal n = 1,233, Private n = 2,315, State/local n = 699)
(Employer Size – 1–100 n = 2,236, 101–250 n = 693, 251–999 n = 738, 1,000+ n = 1,231)



Parking by Work Location, Employer Type, and Employer Size – The most dramatic differences in free parking were evident for different parts of the region. Only 37% of Core area workers said their employers offered free parking to all employees, compared with 81% of respondents who worked in the Middle Ring and 87% of respondents who worked in the Outer Ring.

The 2022 Middle Ring and Outer Ring percentages were essentially the same as for 2019 (Middle Ring 80%, Outer Ring 84%), but the 37% free parking for Core area workers in 2022 was notably higher than the 23% of Core area workers who said they had free parking in 2019. Because parking had always been constrained for Core worksites, this supports the assumption that employees who were working at the main worksite were permitted to use parking that had not previously been available to them.

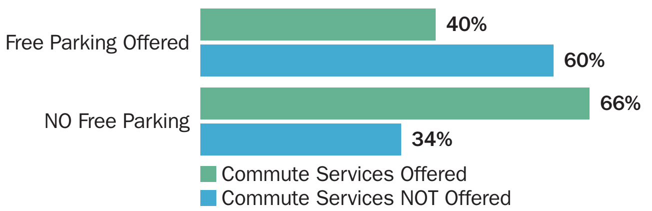
Federal agency workers and respondents who worked for nonprofit organizations were least likely to have free parking at work. About 55% of respondents who worked for nonprofits and 59% who worked for Federal agencies said their employers provided free onsite parking to all employees. By contrast, 68% of respondents who worked for private sector and 70% of state/local agency employees said they had free parking. All employer types reported higher availability of free parking in 2022 than in 2019, but the increases were higher for Federal agencies (15 percentage points) and nonprofits (13 percentage points) than for either private sector or state/local agencies (5 percentage points). Note that many Federal agency and nonprofit worksites are in the Core, thus, both the lower 2022 parking availability for these employees compared with private and state/local employers and the greater change in availability between 2019 and 2022 could be due in part to their location.

Respondents who worked for large employers were less likely to have free parking. About six in ten respondents who were employed by employers with 251 or more employees had free parking, compared with about seven in ten respondents who worked for employers with 250 or fewer employees. Again, all employer size groups reported higher free parking percentages in 2022 than in 2019, but the relative changes were not substantially different by employer size.

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. Four in ten (40%) 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, 66% 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 = 3,304, No free parking n = 1,637)



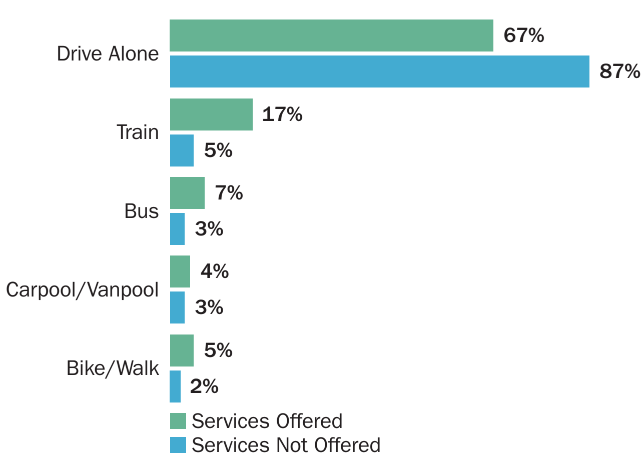
Impact of Commute Assistance Services and Parking

COMMUTE MODE BY COMMUTE ASSISTANCE BENEFITS/ SERVICES OFFERED

As with other distributions of primary mode in the report, the percentages are based on respondents who were not primarily teleworking.

A much lower share of respondents who had access to alternative mode benefits/services drove alone (67%) when compared with respondents whose employers did not provide these services (87%). Train use was particularly higher for respondents with commute services; 17% of respondents whose employers offered commute benefits/services rode the train to work, compared with 5% of respondents whose employers did not offer these services. Use of other alternative modes also was higher among respondents who had access to commute benefits/services as for respondents with no services.

Primary Commute Mode (Excluding Primary Telework) by Commute Benefits/ Services Offered
(Services offered n = 2,041, Services not offered n = 2,350)



While 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 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 than for respondents who worked in the Middle Ring or Outer Ring.

However, respondents who worked in the Core also could be faced with greater impediments to driving alone. For example, Core area workers commuted an average of 42 minutes one-way, compared with 33 minutes for Middle Ring and 28 minutes for Outer Ring workers. Respondents who worked in the 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 and encouraging greater use of modes other than driving alone.

COMMUTE MODE BY PARKING SERVICES OFFERED

The next figure compares mode use rates for respondents who had free onsite 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 substantial; 87% of respondents whose employers offered free parking drove alone, compared with 60% of respondents who did not have this benefit.

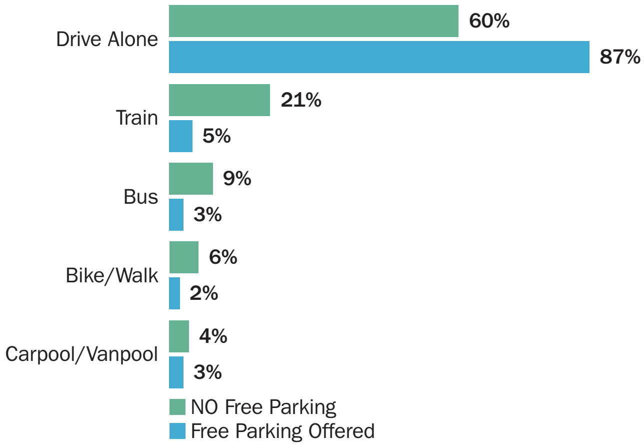
Respondents who had to pay to park used all alternative modes at higher rates than did respondents with free parking. The difference was especially striking for use of transit; train mode share was more than four times as high for respondents who had to pay to park as for respondents who had free parking. 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 role parking availability and cost play in commute decisions.

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

Finally, the next figure presents a comparison of mode 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 onsite 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.

Primary Commute Mode (Excluding Primary Telework) by Free Parking Available at Work

(No free parking n = 2,862, Free parking offered n = 1,529)



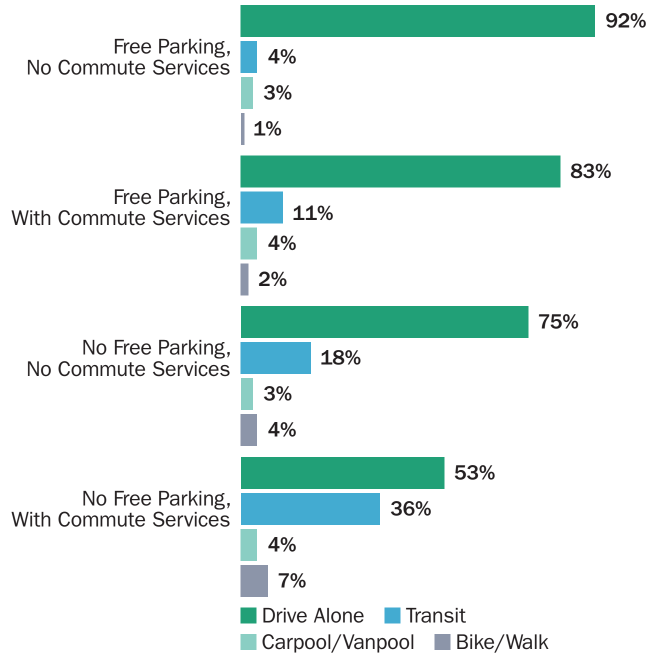
The drive alone mode share declined across the four cases, indicating that both parking cost and commute services influenced commuters' choice of driving alone. When parking was free and commute services were not offered, 92% of respondents drove alone to work. The drive alone rate dropped to 83% among respondents who had free parking, but when commute services were added.

When no free parking was available, the drive alone rate was 75% when no commute services were offered. This was 17 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 22 percentage points to 53%, 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, 4% of respondents used transit when no commute benefits/services were available and 11% used transit when they had access to commute benefits/services. At worksites where parking was not free, the transit share was 18% among respondents who did not have access to commute benefits/services and 36% when commute benefits/services were offered.

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

(Free parking, no commute services n = 1,320,
Free parking, with commute services n = 1,541)
(No free parking, no commute services n = 444,
No free parking, with commute services n = 1,083)



The figure also shows mode shares for bike/walk and carpool/vanpool. Carpool/vanpool rates were statistically the same across the four parking and commute service combinations, but there were slight differences in use of bike/walk. For respondents who reported free parking, bike/walk mode use was 1% without commute services and 2% when services were offered. Similarly, when parking was not free, bike/walk mode use was 4% without commute services and 7% when services were available.

The more dramatic differences in transit use reflect the motivating value of transit subsidies. Three-quarters of respondents who reported access to commute services said a transit subsidy was an available benefit, thus the "with commute services" categories would reflect a substantial transit motivating factor. Services, such as bike support services, bikeshare, carpool subsidies, and carpool/vanpool preferential parking, which primarily target use of bike/walk or carpool/vanpool, were offered by fewer employers. **[CC]**

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