Seattle Employer Transportation Benefits

Survey Results

Report - March 2016

commute seattle

Prepared by:

EMC RESEARCH

MARKET & OPINION RESEARCH SERVICES

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1 Project Overview

Commute Seattle is a not-for-profit Transportation Management Association (TMA) working to ensure commuters live more and drive less by improving access and ability to and within downtown. Founded in 2004, Commute Seattle is led by a partnership between the Downtown Seattle Association, King County Metro, and the Seattle Department of Transportation.

The primary goal of this research is to better understand behaviors and attitudes surrounding employee commute benefits among employers in Seattle's Center City and in the neighborhoods of Ballard, Fremont and the University District. This survey was designed to help gauge the types of commute benefits and amenities worksites currently offer, measure the perceived demand for transit subsidies and worksites' openness to offering new benefits to employees and identify current barriers to offering those benefits. This survey aimed to identify potential benefit needs and opportunities across general employer subgroups (i.e. by geography, worksite size and industry type) to aid in developing future ORCA Business Choice and Passport program services and communications.

2 Summary of Methodology

2.1 Sampling

For this project, EMC pulled a random sample of worksites with five or more employees in select Seattle neighborhoods: Downtown Seattle/Center City, Ballard, Fremont and the University District. The sample geography was constructed using a combination of Commute Seattle's Center City survey definition and select Census tracts to define Ballard, Fremont and the University District. A visual map of these areas is featured on page 37.

After removing CTR-affected worksites from the full business list provided by Scientific Telephone Samples (STS), EMC pulled the sample based on the estimated number of worksites in each neighborhood and the number of employees at each worksite. The sample was stratified by neighborhood and business size category (5-9, 10-19, 20-49, 50-99 and 100+) with an oversample for larger worksites with 20 or more employees. After data collection, the final data was weighted to approximate the estimated proportions of these groups in the final results.

2.2 Data Collection

To kick off data collection, EMC mailed each sampled worksite with 20 or more employees a pre-notification letter for the study. This letter was addressed from Commute Seattle and King County and it notified worksites about the upcoming study and encouraged them to participate, either online via a provided survey URL or by phone with a live interviewer. The letter also included details about the survey objectives, timeline and participation incentives.

The full text of the invitation and pre-notification letter is shown on page 38.

Data collection took place over a three-and-a-half week period from December 19th, 2015 to January 13th, 2016. After the first week, worksites that had not yet participated online were contacted by live interviewers to participate in the phone version of the survey. At this time, interviewers started calling all worksites that were flagged as having 5 or more employees in the sample. The phone version of the survey was conducted via Computer-Assisted Telephone Interview (CATI).

The survey's introduction and initial questions identified qualified respondents – defined as employees who are directly involved in making or informing the decisions about employee pay and benefits for their particular worksite – to participate in the study. These initial survey questions also confirmed respondents' role in making decisions (either solely, shared or informing others who decide), the name of the organization, the worksite's location and the number of employees based at that worksite.

The full questionnaire is shown starting on page 40, along with overall topline results from the study.

2.3 Weighting and Analysis

All completed worksite surveys were reviewed for completeness and consistency. Once data collection was completed, the phone and web surveys were cleaned and merged into a combined dataset. Records that were incomplete or whose worksites were located outside of the interviewing geographies were removed from the final data. A total of 293 interviews were included in the final dataset.

To better represent the broader population of worksites in the survey area, the final data was weighted to the estimated worksite counts within each neighborhood based on the full business counts provided by STS. A table featuring the weighted and unweighted proportions of respondents in each neighborhood and worksite category is included in the appendix on page 38.

3 Key Findings

- **Nearly half of worksites surveyed currently offer transit passes or subsidies to employees.**

  Transit benefits are widely-used by worksites that are centrally located in Downtown Seattle, are likely based at a consistent location (i.e. an office environment), operate during typical daytime business hours and have larger workforces that can scale down the per-person benefit costs. Among key survey subgroups, current participation is highest among larger worksites with 20 or more employees, business services and technology companies and worksites located in Downtown Seattle.

- **A variety of worksite types express similar levels of general interest in potentially offering transit passes and subsidies in the future.**

  Roughly a quarter of worksites currently do not offer transit benefits but are either somewhat or very interested in doing so in the future – this proportion is consistent across subgroups regardless of worksite size, location and broader industry type. Excluding the worksites that already offer transit benefits, intensity of this enthusiasm is highest among larger worksites with 20 or more employees and are located in Center City.

- **Interest in other benefits varies greatly by major subgroup, providing additional opportunities to adapt the program to various types of worksites.**

  Working with businesses to tailor program offerings to include a unique mix of benefits could help improve appeal by ensuring the program best fits each worksite's needs. For example, carpool and vanpool subsidies may have less appeal to smaller worksites where it is more difficult to organize those types of trips but they may consider subsidies for carshare programs or monetary benefits or drawings for using drive-alone alternatives to be more fitting for their needs.

- **Program communications should emphasize the value of improving competitiveness while assuaging affordability concerns.**

  Worksites that already invest in transit incentives primarily view it as a tool to bolster their competitiveness in hiring and retaining talent. This is likely the most effective benefit to emphasize when communicating with potential worksites about joining the program, while easing parking/access concerns and societal impacts may also serve as supporting benefits.

  Combined with the ORCA Passport program benefits, communicating the value and cost-savings aspects of the programs, particularly compared to the face value of ORCA passes and parking permits, may help ease worksites' cost and affordability concerns.

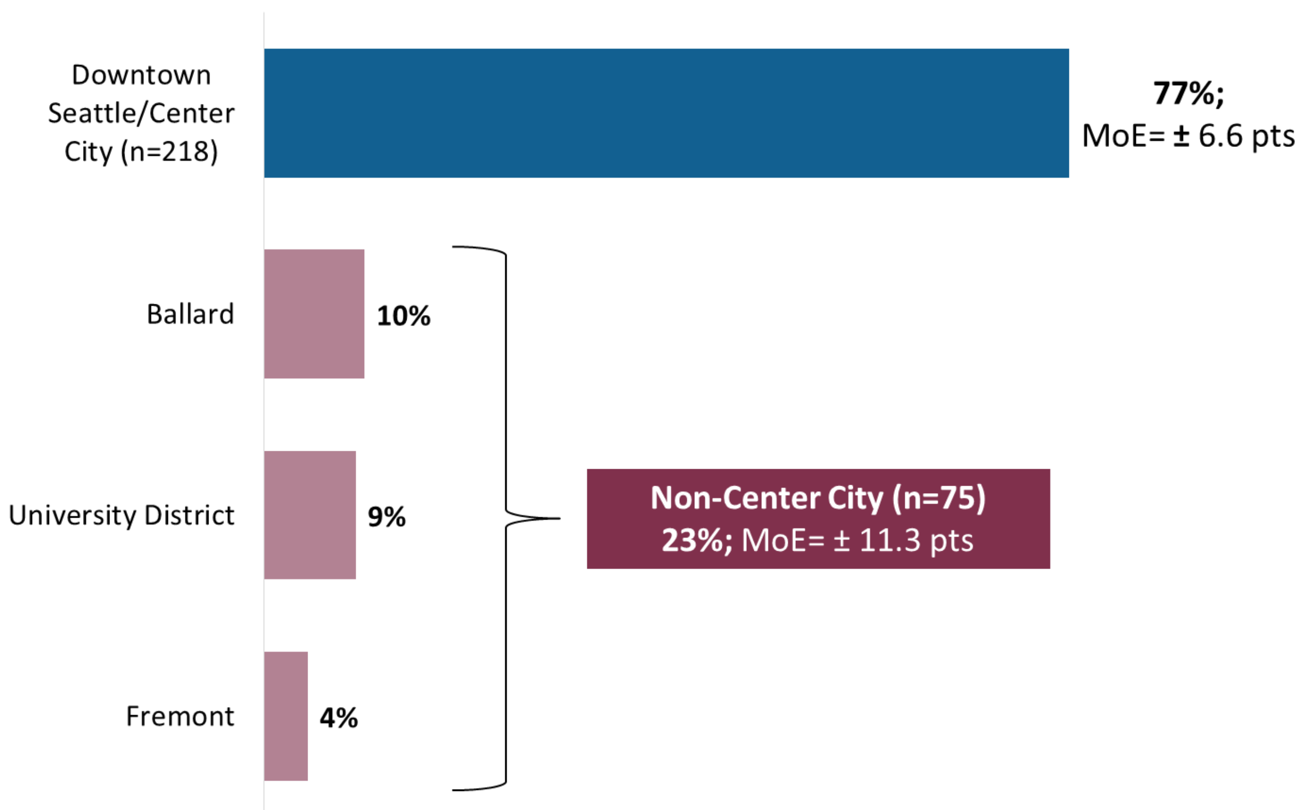
4 Worksite Profile

A variety of questions were asked in the survey to build a profile of participating worksites. Key information including physical address, number of employees and industry type was collected to screen for qualified worksites to take the survey and to categorize worksites into key subgroups for analysis. This report highlights some of the key comparisons and differences between worksites by geographic area (Center City and Non-Center City), worksite size (5-19 employees and 20+ employees), and industry type (business and technology-oriented worksites and other, miscellaneous services like retail and healthcare). Additional profile information for worksites is reported beginning on page 33.

4.1 Worksite Neighborhoods

About three-quarters of participating worksites are located in Center City while the rest are split between Ballard, the University District and Fremont. The weighted proportions of these neighborhoods are shown below and the unweighted numbers are featured in the weighting table on page 38.

Figure 4-1 – Neighborhood Category Breakdown of Worksites Interviewed

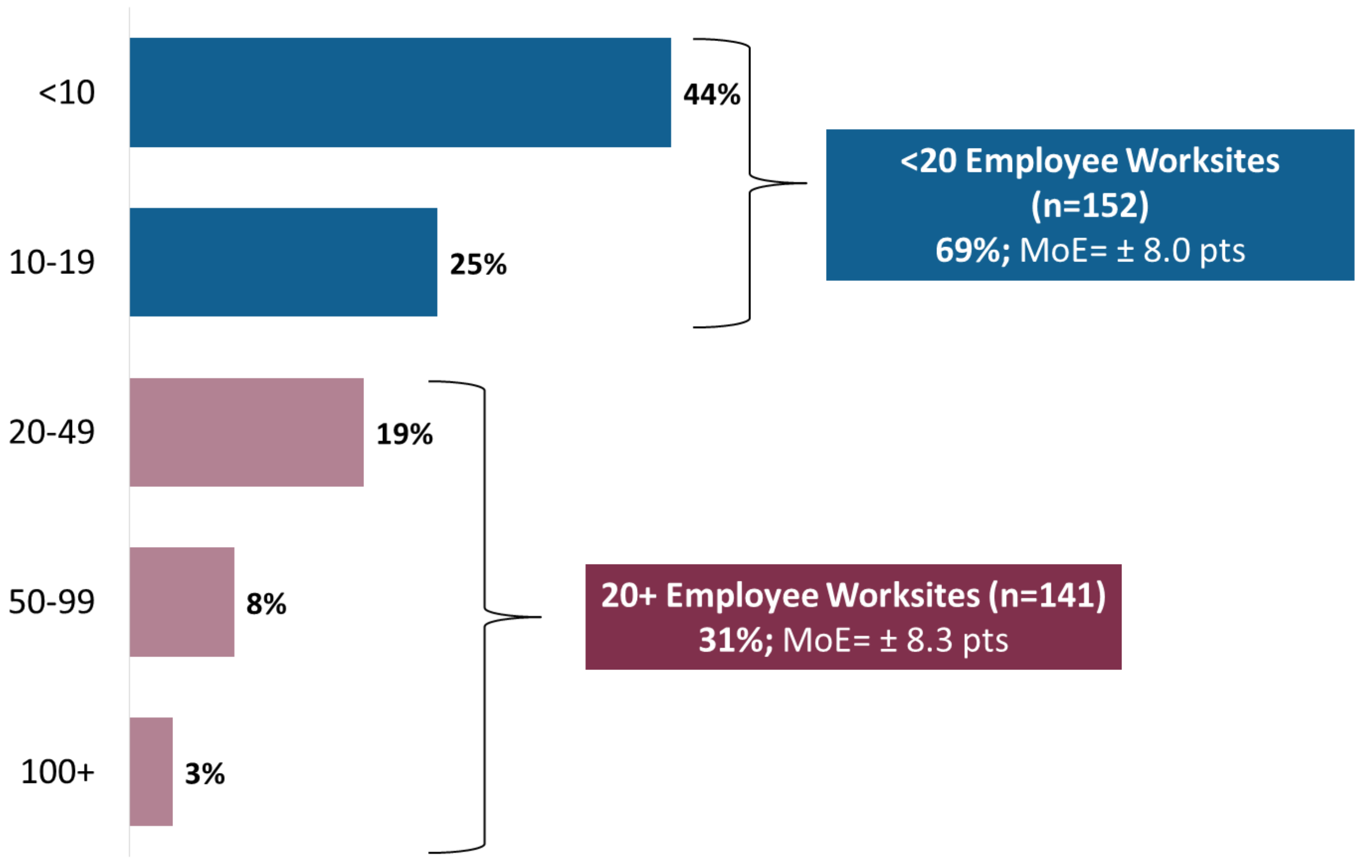


Q7. What is the street address for your particular work location?
[NEIGHBORHOOD CATEGORIES CODED BASED ON ADDRESS]

4.2 Worksite Employee Size

For the survey, worksites with 5-19 employees (152 interviews) and 20 or more employees (141 interviews) were sampled in near-equal proportions so they could be compared as a stand-alone subgroups. After weighting each to its estimated proportion of the overall universe, about two-thirds of worksites in the survey area report to have between 5-19 employees, while a third have 20 or more employees.

Figure 4-2 – Worksite Size Category Breakdown of Worksites Interviewed



Q8. How many employees are based at your particular work location?

4.3 Worksite Industry Type

Worksites participating in the survey were classified by industry type based on similar categories used by the State's Commute Trip Reduction (CTR) program. Additional categories were created to capture other industry types, as needed.

The composition of worksite industry type varies by geography. Center City features a greater portion of business and technology worksites typically based in office-environments, including legal services, finance/insurance/real estate, and software development/IT. Non-Center City neighborhoods have a higher concentration of other services including retail and agriculture/mining/forestry/fishing-related organizations. Healthcare-oriented worksites were prominent in both major geographic areas.

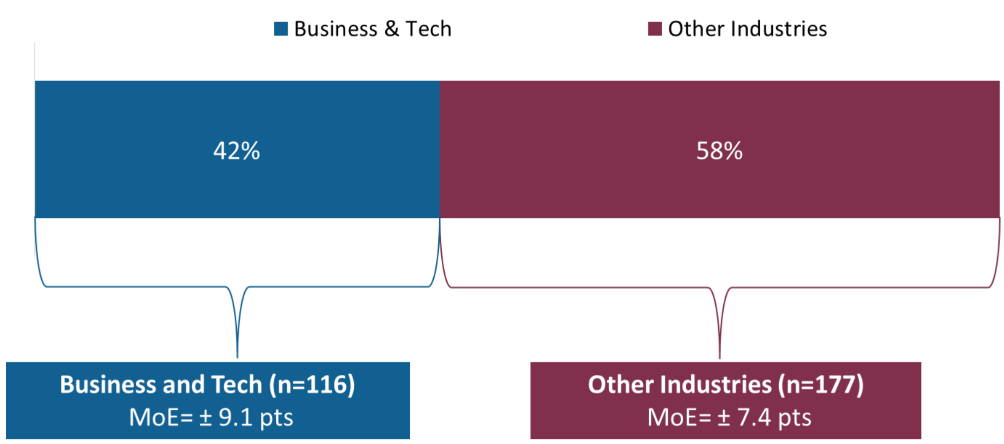
Table 4.1 – Industry Type Breakdown of Worksites Surveyed – Full Categories

Industry	Center City	Non-Center City
Legal services	17%	0%
Finance/Insurance/Real Estate	13%	7%
Healthcare	11%	12%
Info. services/Software/Technical	7%	3%
Retail/Trade	6%	12%
Food and Beverage	6%	6%
Hotels/Lodging/Hospitality	4%	6%
Construction/Landscape	4%	6%
Professional/Personal Services	6%	7%
Architecture	3%	0%
Non-Profit	3%	2%
Fine Arts	3%	0%
Advertising/Printing/Public Relations	2%	3%
Manufacturing	1%	8%
Agriculture/Forestry/Fishing/Mining	1%	10%
Other	13%	18%

Q16. What is your industry? (Open-ended; coded categories shown)

This report will draw comparisons between broad industry categories – including business & tech (blue) and other services (red). The overall composition of these groups is highlighted below.

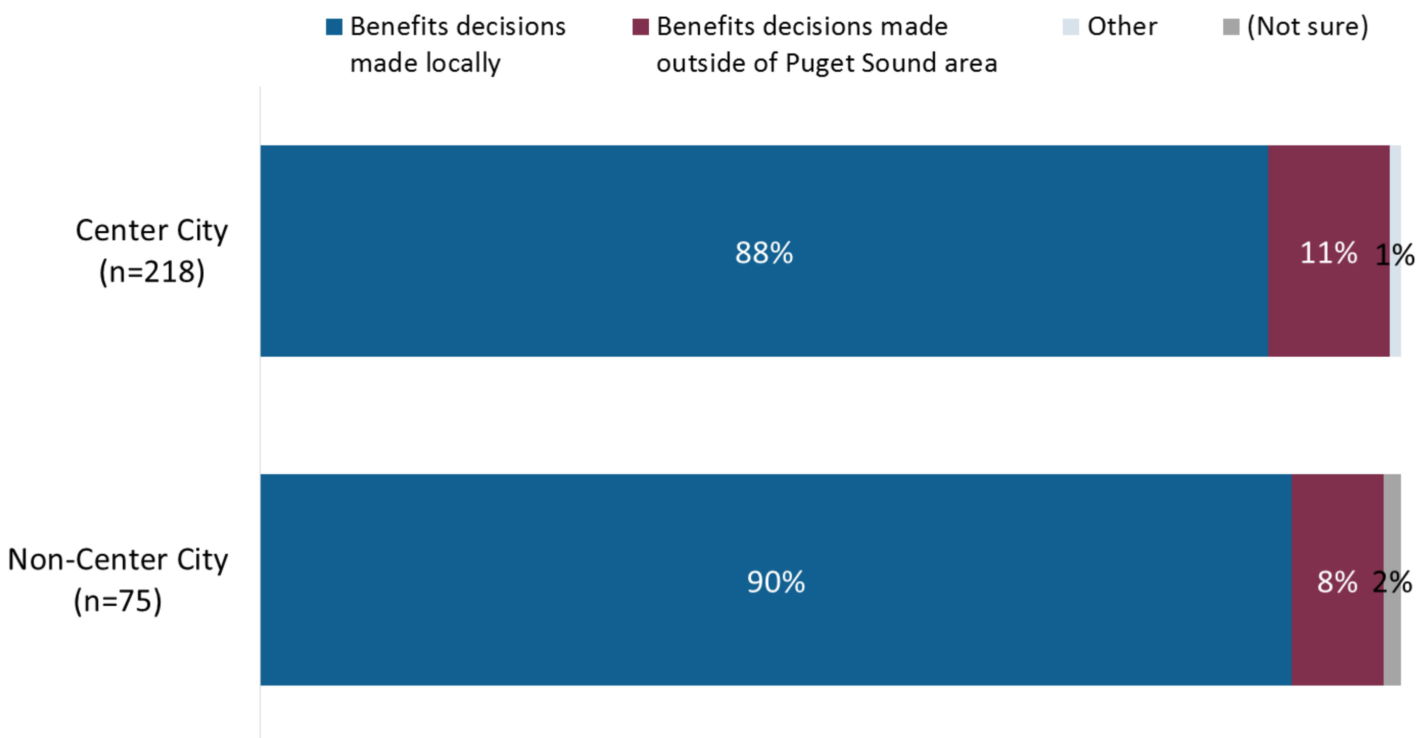
Figure 4-3 – Industry Type Breakdown of Worksites Surveyed – Collapsed Categories



4.4 Local Benefits Decision Making

Decisions about worksite employee benefits are typically made locally even though many worksites have multiple branches or headquarters located outside of the Puget Sound. Regardless of neighborhood, a vast majority (88-90%) of businesses make decisions about employee benefits locally.

Table 4.4 – Origin of Benefits Decision Making for Worksites



Q14. Are decisions about your worksite's employee benefits made locally or by another location or headquarters outside of the Puget Sound area? (Closed-ended)

5 Transit Benefit Overview

This survey tested a variety of commute-related benefits to identify which were most-commonly offered by local employers and to gauge worksites' interest in offering them in the future. This section illustrates the levels of current participation and future interest in subsidies specifically for public transit passes and subsidies and compares those proportions across the key worksite subgroups established in the previous section. Transit-specific subsidies are compared with other commute-related benefits in the next section.

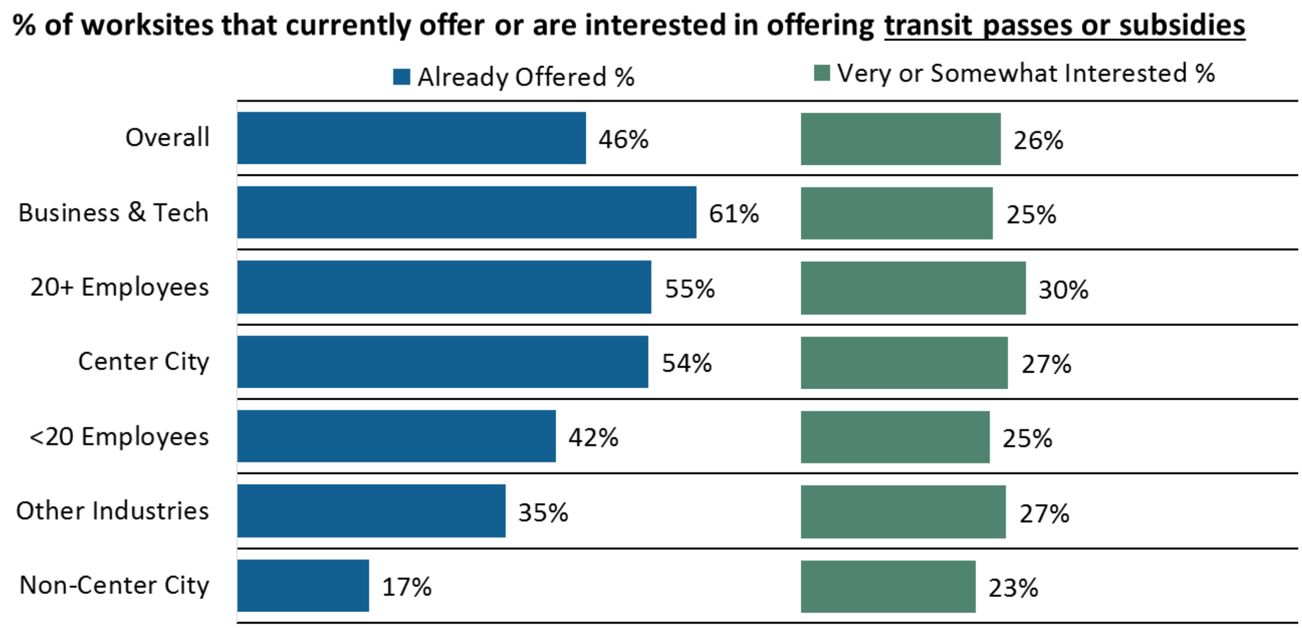
5.1 Transit Pass/Subsidy Benefits Offered & Desired

Transit benefits are heavily popular among worksites with employees that are more likely to commute during peak weekday periods. These include worksites that are involved with business and tech, have 20 or more employees and are located in the Center City.

Overall, nearly half (46%) of worksites currently offer transit passes or subsidies to their employees. Participation is highest among business/tech firms (61%), worksites with 20+ employees (55%) and worksites located in Downtown/Center City (54%). Worksites in Ballard/U-District/Fremont report far lower participation rates (17%) in offering transit-specific subsidies.

Despite the disparities between the types of worksites already offering transit benefits, worksites across all major categories report similar levels of interest (23-30% 'very' or 'somewhat' interested) in offering them to employees in the future.

Figure 5-1 – Key Subgroup Comparison of Transit Pass/Subsidies Offered & Desired



For each item, please say whether your work location already offers that benefit, or if not, whether you think your work location would be very interested, somewhat interested or not at all interested in offering that benefit in the future…

Q17. Transit passes or subsidies, including ORCA cards or other transit fare reimbursements *(Closed-ended)*

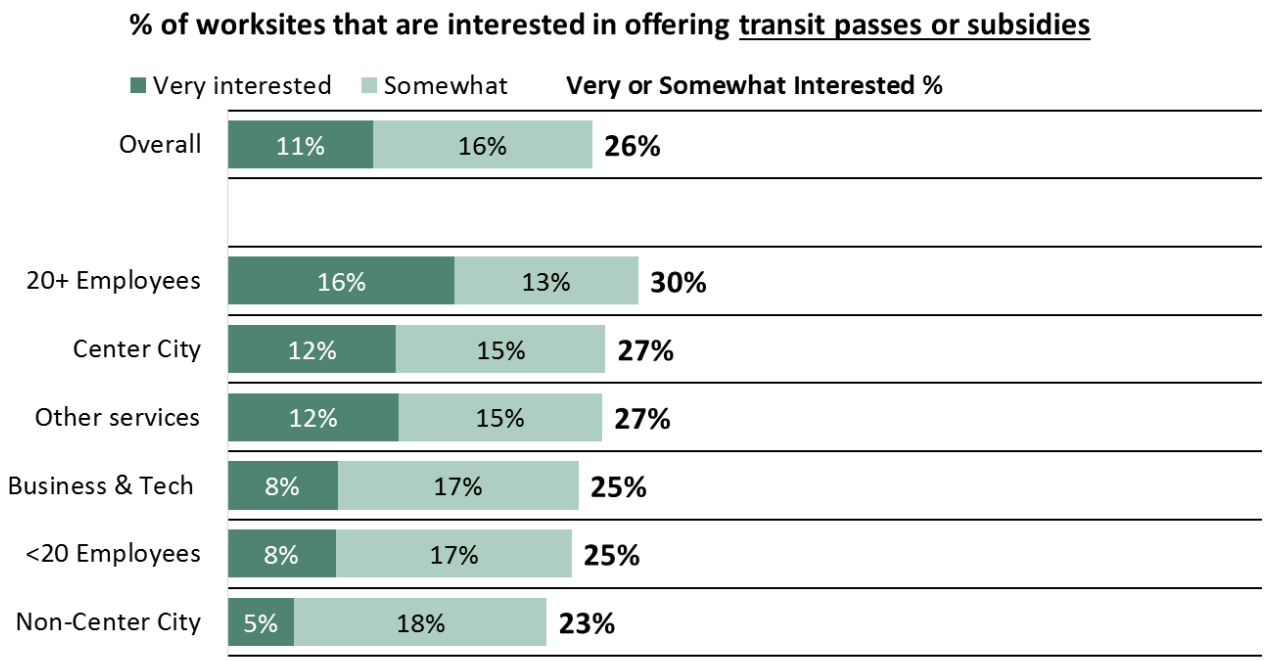
5.2 Transit Pass/Subsidy Benefits Desired with Intensity – Share of all worksites

Overall, a quarter (26%) of overall worksites interested in offering transit subsidies in the future and about one-in-ten (11%) are "Very interested."

While overall interest levels ("very" and "somewhat" combined) are largely steady across key subgroups, the intensity of that interest varies. Larger worksites with 20 or more employees (16% "Very interested") show the greatest intensity of interest in offering transit pass benefits, followed by worksites in Center City (12%) and other services (12%).

This intensity is lowest among worksites outside of Downtown (5%), business and technology firms (8%) and smaller worksites with 5-19 employees (8%).

Figure 5-2 – Key Subgroup Comparison of Transit Pass/Subsidies Desired with Intensity – Share of All Worksites



For each item, please say whether your work location already offers that benefit, or if not, ***whether you think your work location would be very interested, somewhat interested*** *or not at all interested in offering that benefit in the future…*

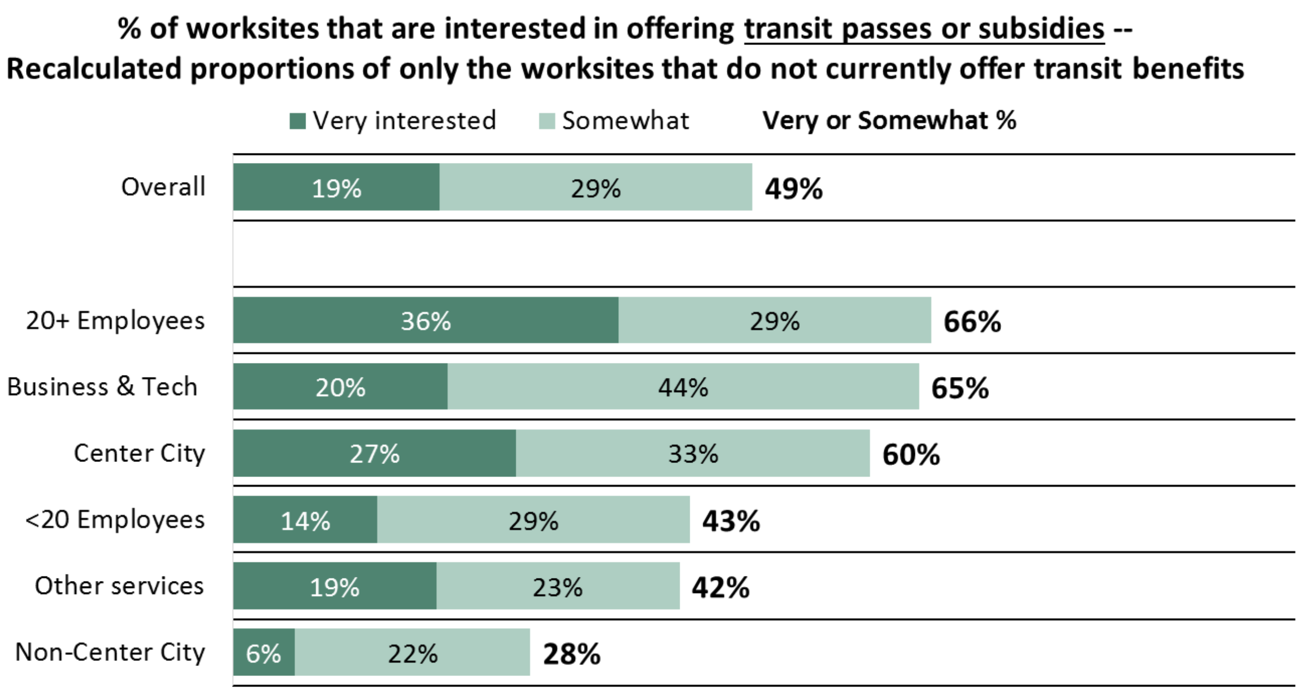
Q17. Transit passes or subsidies, including ORCA cards or other transit fare reimbursements *(Closed-ended)*

5.3 Transit Pass/Subsidy Benefits Desired – Share of worksites that do not already offer

When recalculated to exclude the worksites that already offer transit passes or subsidies (54% of all worksites), majorities of the remaining 20+ employee (66% "very" or "somewhat" combined), business/tech (65%) and Center City (60%) worksites express at least some interest in offering transit benefits in the future.

Intensity is strongest among larger worksites (36% "very interested") and those located in the Center City (27%).

Figure 5-2 – Key Subgroup Comparison of Transit Pass/Subsidies Desired with Intensity – Recalculated Share of Worksites



For each item, please say whether your work location already offers that benefit, or if not, ***whether you think your work location would be very interested, somewhat interested*** *or not at all interested in offering that benefit in the future…*

Q17. Transit passes or subsidies, including ORCA cards or other transit fare reimbursements *(Closed-ended)*

6 Commute-Related Benefits Currently Offered

For each of the following commute benefits listed in Table 6.1 below, respondents were asked whether their worksites currently offered that benefit to employees. If that benefit wasn't offered, respondents were asked how interested they think their worksite would be in offering that benefit in the future.

6.1 Commute-Related Benefits Tested

The language describing each benefit has been adapted from the original survey phrasing shown in the table below. The original version is what respondents heard or read while completing the survey. As a shorthand, the truncated versions are shown throughout this report to reduce clutter and keep charts as simple as possible.

Table 6.1 – Original & Truncated Text of Commute-Related Benefits in Survey

Truncated version (as reported)	Original version (as phrased in survey)
Transit passes or subsidies	Transit passes or subsidies, including ORCA cards or other transit fare reimbursements (Q17)
Vanpool subsidies	Vanpool fare subsidies (Q18)
Pre-tax transit spending	Ability for employees to set aside a portion of their pre-tax income to spend on transit or vanpool fare (Q19)
Emergency rides home	Emergency rides home for employees who have not used a car to get to work (Q20)
Flexible scheduling	Flexible scheduling allowing employees to set their start and end times to meet their needs (Q21)
Compressed work week	Compressed work week to allow employees to work a full-time work week in fewer days (Q22)
Telecommuting	Permission to work from home on a regular schedule, often called telecommuting or teleworking (Q23)
Carshare discount	Employer discount for a carshare membership including Zipcar or Car2Go (Q24)
Bikeshare discount	Employer discount for a Pronto bikeshare membership (Q25)
Monetary incentives	Monetary benefits or drawings for employees who carpool, bike or walk to work instead of drive alone (Q26)
Bike amenities	Amenities provided by your organization or property management for employees who bike to work (Q27)

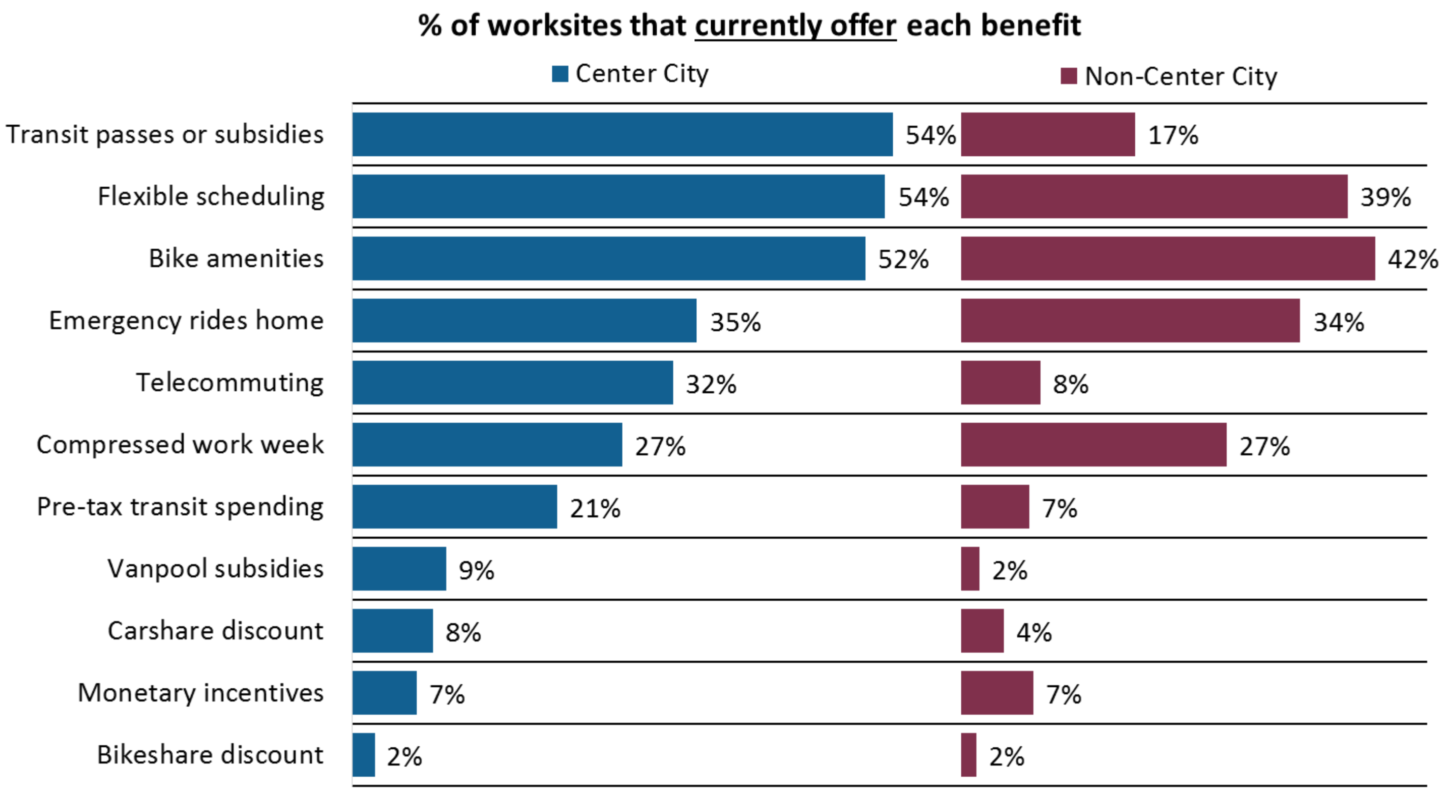
Q17-Q27. For each item, please say whether your work location already offers that benefit, or if not, whether you think your work location would be very interested, somewhat interested or not at all interested in offering that benefit in the future. (Closed-ended)

6.2 Commute-Related Benefits Offered by Geography

While worksites both in and outside of Downtown currently offer a variety of commute-related benefits, transit subsidies are particularly popular among Center City worksites. North Seattle worksites focus on offering non-pecuniary benefits to enhance commute/workweek autonomy in lieu of more expensive monetary benefits.

In Downtown, transit passes (54% offered) and flexible scheduling (54%) are among the most-utilized transportation benefits, followed by bike amenities (52%). Transit offerings drop significantly (17%) in the northern neighborhoods while bike amenities (42%) and flexible scheduling (39%) continue to be popular.

Figure 6-1 – Center City & Non-Center City Comparison of Commute-Related Benefits Currently Offered



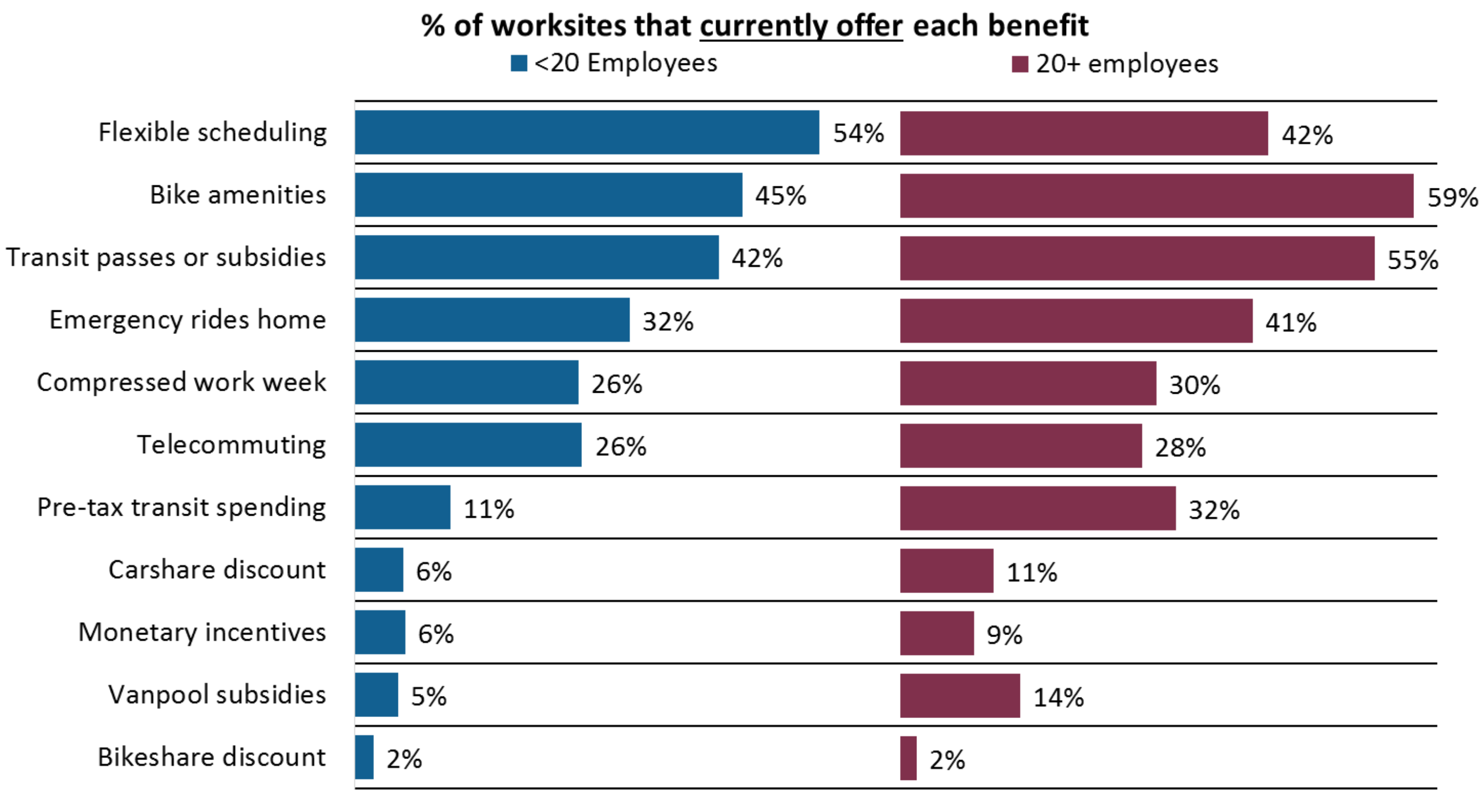
*Q17-Q27. For each item, please say **whether your work location already offers that benefit**, or if not, whether you think your work location would be very interested, somewhat interested or not at all interested in offering that benefit in the future. (Closed-ended)*

6.3 Commute-Related Benefits Offered by Worksite Size

Both smaller (5-19 employee) and larger (20+) worksites offer a comparably broad mix of commute-related benefits to their employees. A key difference is that larger worksites are more likely to invest in transit pass subsidies, where increased scale results in lower costs per employee.

Smaller (<20 employees) and larger worksites (20+ employees) tend to offer similar types of benefits. Bike amenities (59→45% offered), transit passes (55→42%), pre-tax transit spending (32→11%) and vanpool subsidies (14→ 5%) are more popular among larger worksites. Flexible scheduling (54→42%) is more popular among smaller worksites.

Figure 6-2 – Worksite Employee Size Comparison of Commute-Related Benefits Currently Offered

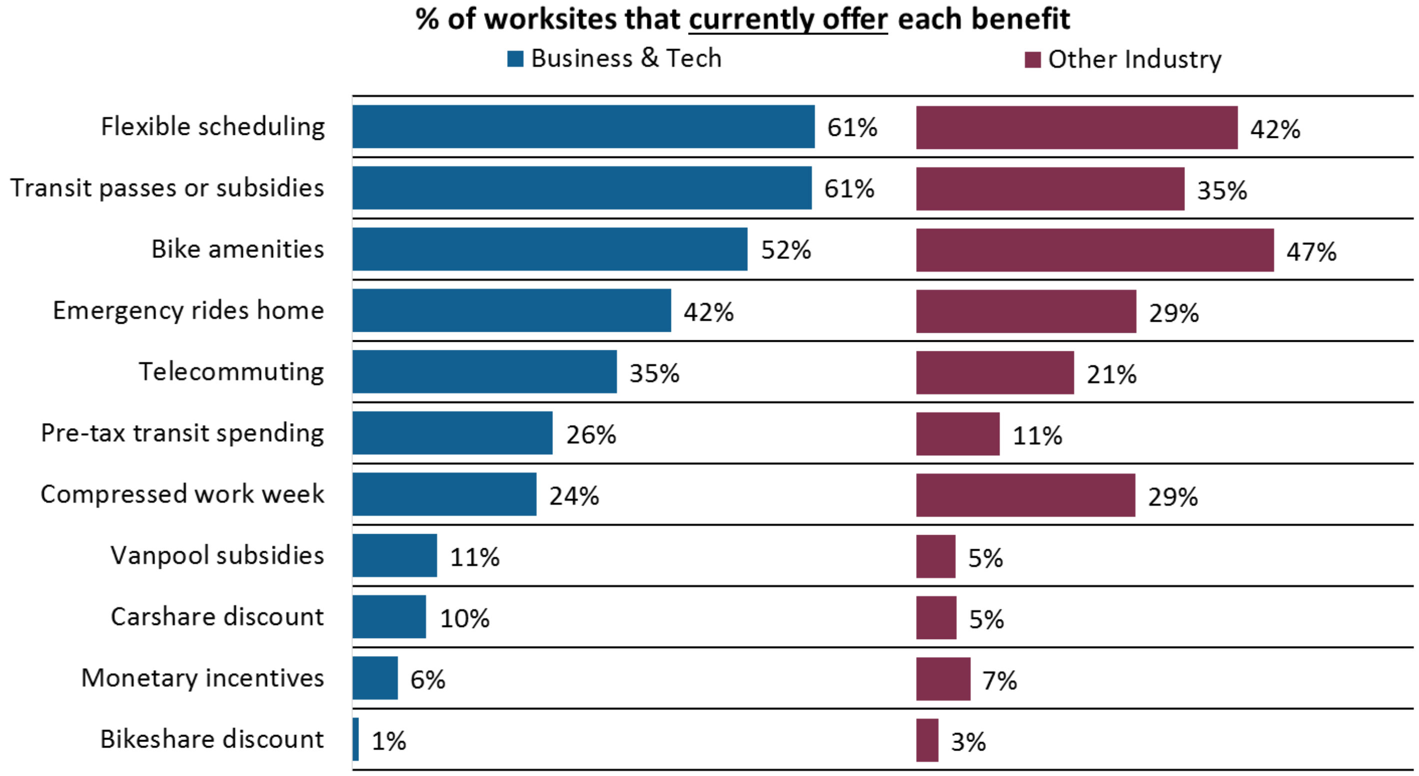


*Q17-Q27. For each item, please say **whether your work location already offers that benefit**, or if not, whether you think your work location would be very interested, somewhat interested or not at all interested in offering that benefit in the future. (Closed-ended)*

6.4 Commute-Related Benefits Offered by Industry Type

Business/tech worksites (including finance, legal and software development) tend to offer more transportation benefits across the board than other service industries (i.e. healthcare, restaurants, hospitality and retail). Business/tech worksites tend to value commute-related benefits – both monetary and otherwise – as they often operate during regular weekday hours and are more likely to be impacted by peak-period commute conditions.

Figure 6-3 – Worksite Industry Type Comparison of Commute-Related Benefits Currently Offered



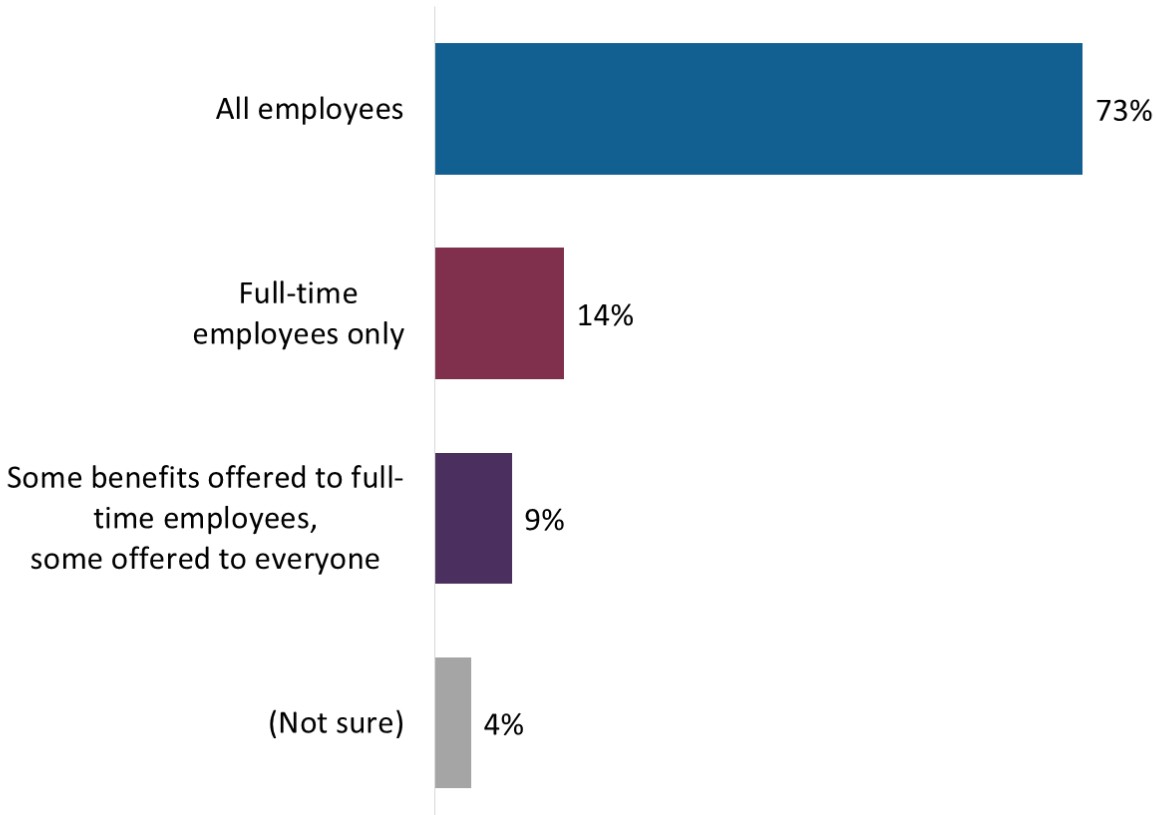
*Q17-Q27. For each item, please say **whether your work location already offers that benefit**, or if not, whether you think your work location would be very interested, somewhat interested or not at all interested in offering that benefit in the future. (Closed-ended)*

7 Commute Benefits Offered – Follow-Up Details

7.1 Commute-Related Benefit Availability

A strong majority of worksites currently offer commute-related benefits to all employees.

Figure 7-1 – Commute Benefit Availability Based on Employee Status



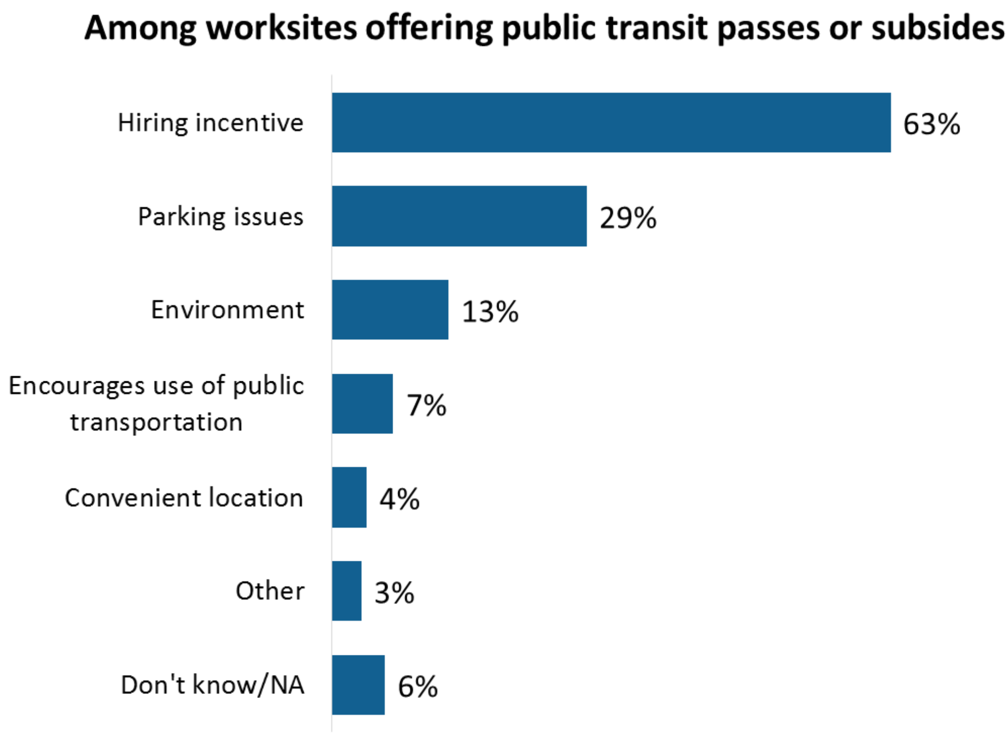
Q29. For the commute-related benefits your work location currently offers, are these benefits offered to all employees or full-time employees only? (Closed-ended)

7.2 Main Reasons for Offering Transit Pass/Subsidy Benefits

Worksites currently offering transit subsidies primarily view it as a tool to enhance their competitiveness in attracting talent. Respondents overwhelmingly consider its value as a hiring and retention incentive (63% mentioned) as the primary selling point.

Necessity also plays a role as nearly a third (29%) of worksites also cited parking challenges as a key reason to offer transit benefits. To a lesser extent, worksites also cited broader societal benefits including environmental-friendliness (13%) and encouraging public transit usage (7%).

Figure 7-2 – Top Reasons for Offering Transit Pass/Subsidy Benefits

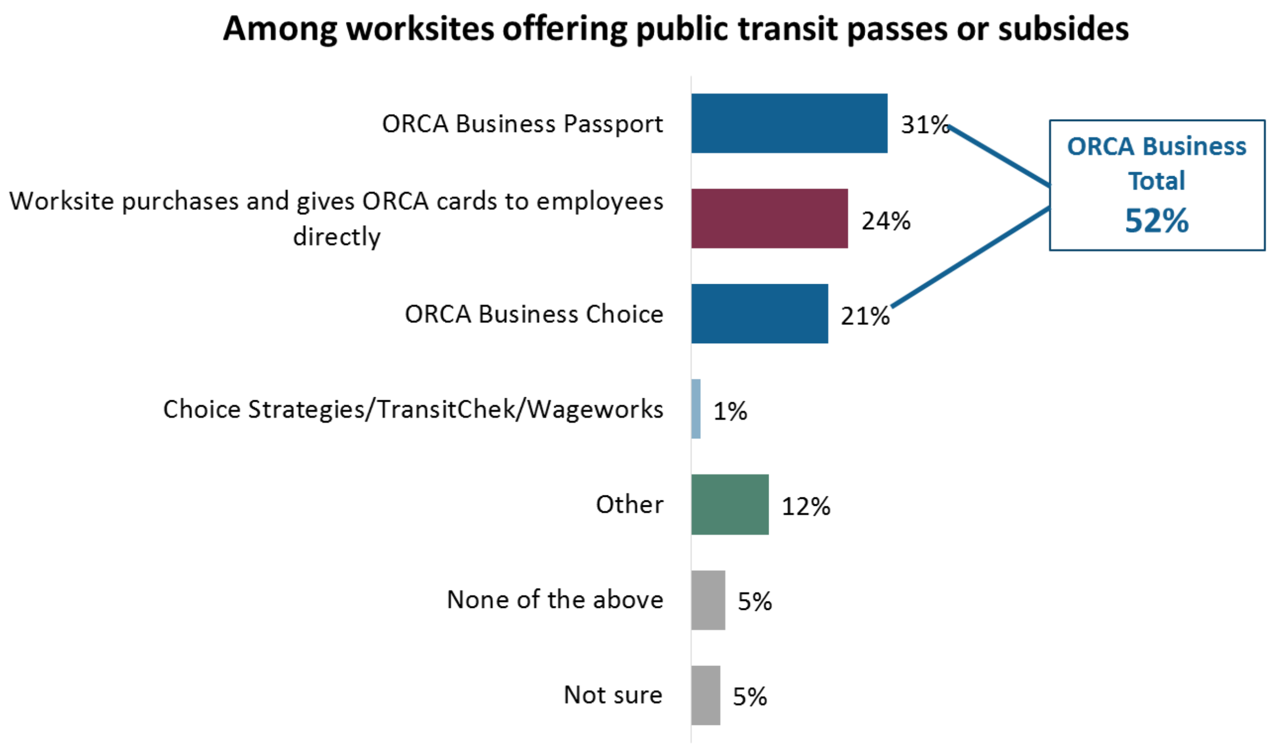


Q36. To your knowledge, what are the primary reasons your work location offers transit benefits to its employees? (Open-ended; coded categories shown)

7.3 Current Transit Pass/Subsidy Benefits Program

Of worksites that currently offer transit benefits, about half (52%) report using the ORCA Business Passport or Choice program. About a quarter (24%) currently purchase ORCA cards for their employees directly, without a benefits subsidy program.

Figure 7-3 – Benefits Programs Used by Worksites Offering Transit Benefits

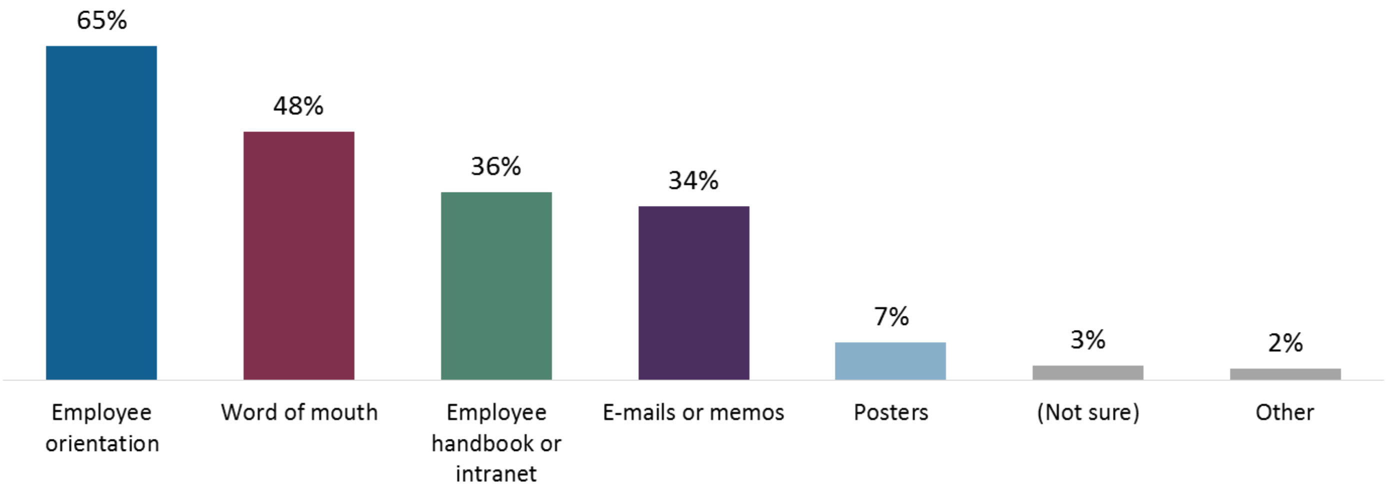


Q33. Through which particular program does your work location offer employee transit benefits? (Closed-ended)

7.4 Communicating Transit Benefit Availability

Two-thirds (65%) of worksites use new hire orientations as the preferred method for informing employees about commute benefits. Nearly half (48%) use word-of-mouth while about a third use the employee handbook (36%) and emails or memos (34%).

Figure 7-4 – Worksites' Top Methods for Communicating Benefits Availability to Employees

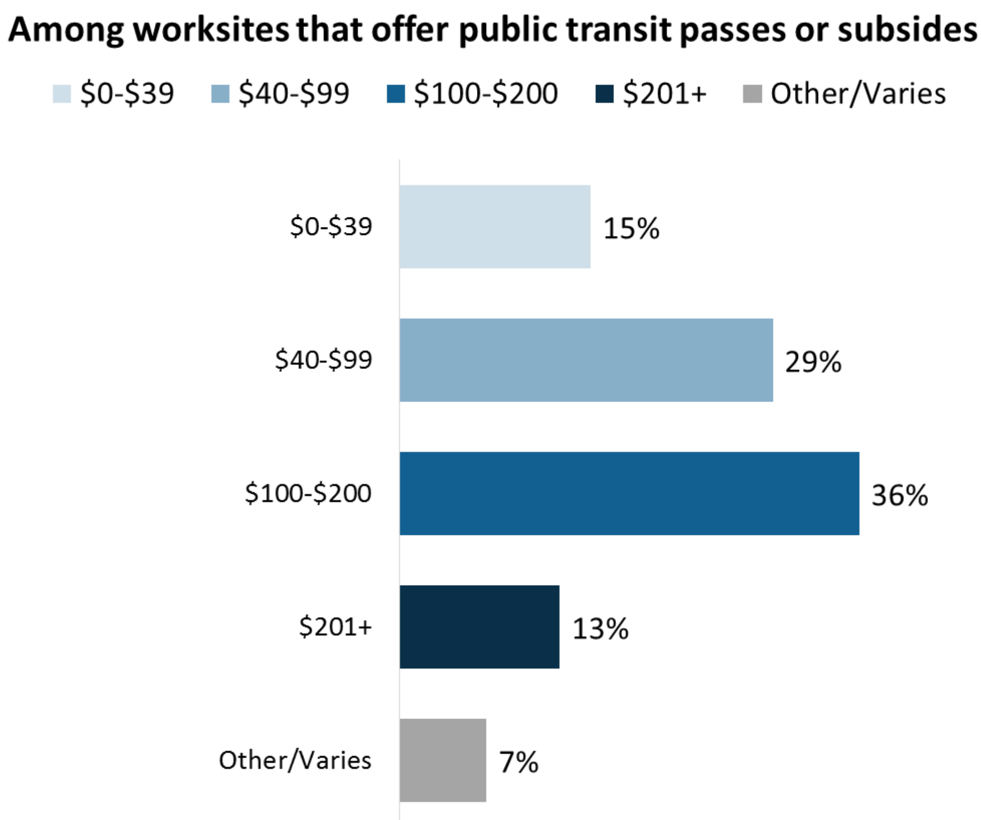


Q30. How do your employees usually hear about the commute-related benefits your work location offers? (Multiple responses; closed-ended)

7.5 Monthly Amount Subsidized for Transit

About half of worksites currently offering public transit benefits subsidize at least $100 of the cost, per employee per month.

Figure 7-5 – Dollar Amount Ranges of Transit Costs Subsidized by Worksites



Q35. How much of the monthly transit pass cost is paid for by the employer, per employee? (Open-ended)

8 Commute-Related Benefits Desired in the Future

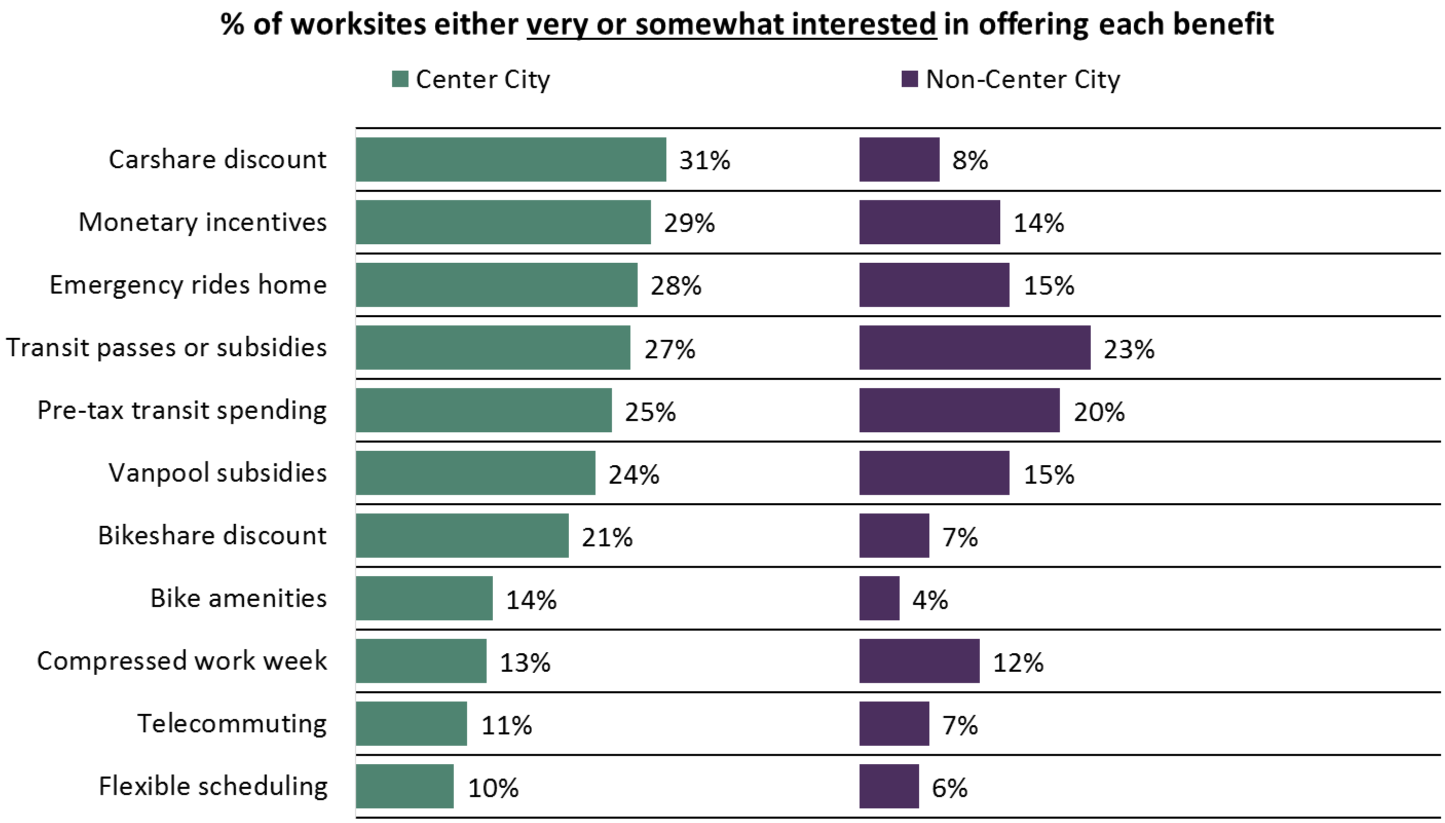
This section focuses on how worksites would prioritize offering various types of commuting benefits in the future. The percentages in this section show the combined portions of worksites that said they'd be very or somewhat interested in offering each benefit to employees. The following charts compare demand by geographic area, worksite size and industry type.

8.1 Desired Commute-Related Benefits by Geography

A quarter of worksites in Center City express interest in a variety of transportation subsidies and incentives across the board. They're significantly interested in monetary items including prizes/drawings (29% interested) and subsidies for carshare (31%), transit passes (27%), vanpool (24%) and bikeshare (21%) services.

Non-Center City sites are most interested in transit passes (23% interested) and pre-tax transit allowances (20%) but show relatively less interest in offering other types of monetary benefits.

Figure 8-1 – Center City & Non-Center City Comparison of Commute-Related Benefits Desired

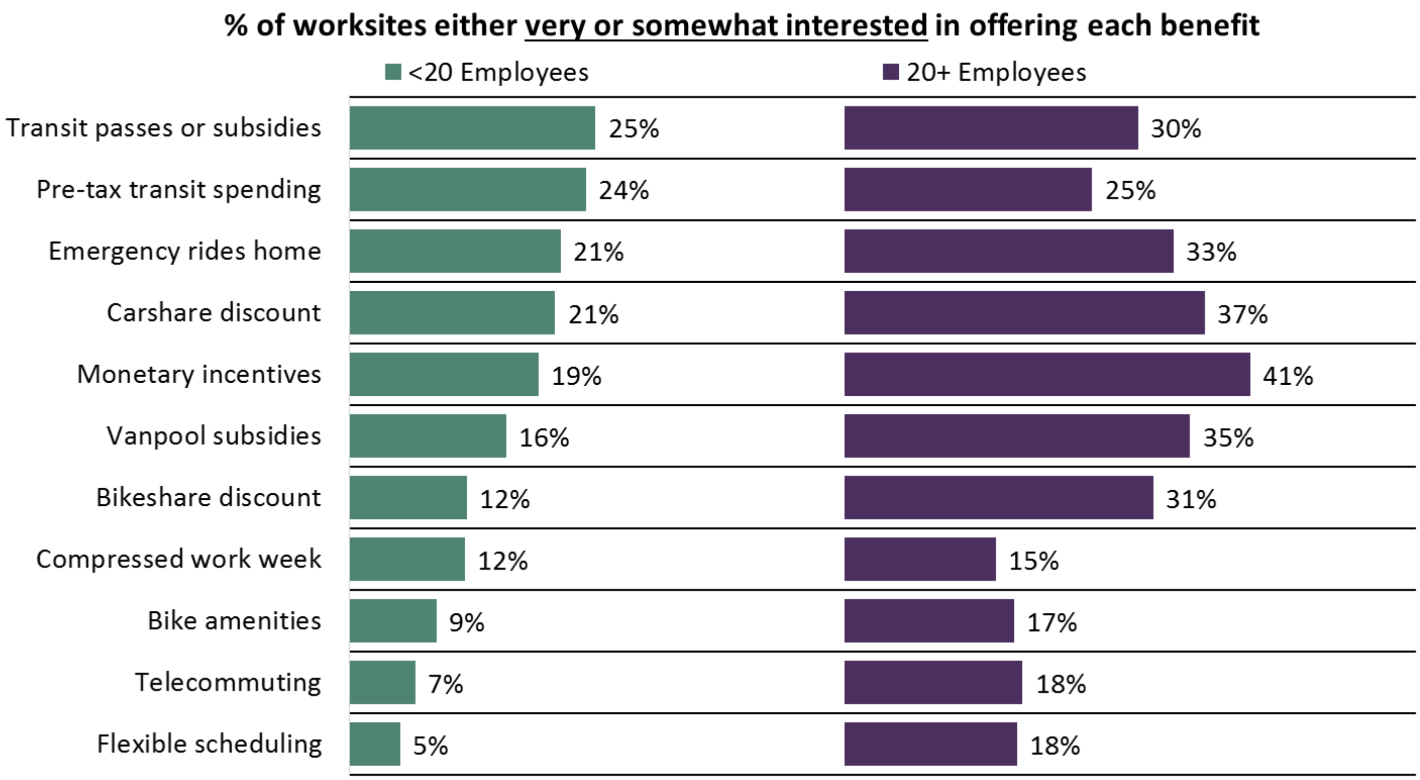


*Q17-Q27. For each item, please say whether your work location already offers that benefit, or if not, **whether you think your work location would be very interested, somewhat interested or not at all interested in offering that benefit in the future**. (Closed-ended)*

8.2 Desired Commute-Related Benefits by Worksite Size

Compared to smaller worksites, larger worksites with 20 or more employees are more open to offering a variety of benefits, particularly monetary prizes and drawings (41% interested) and subsidies for carshare (37%), vanpool (35%), bikeshare (31%) and transit (30%). A quarter of smaller worksites express interest in transit passes (25%) and pre-tax transit allowances (24%).

Figure 8-2 – Worksite Employee Size Comparison of Commute-Related Benefits Desired

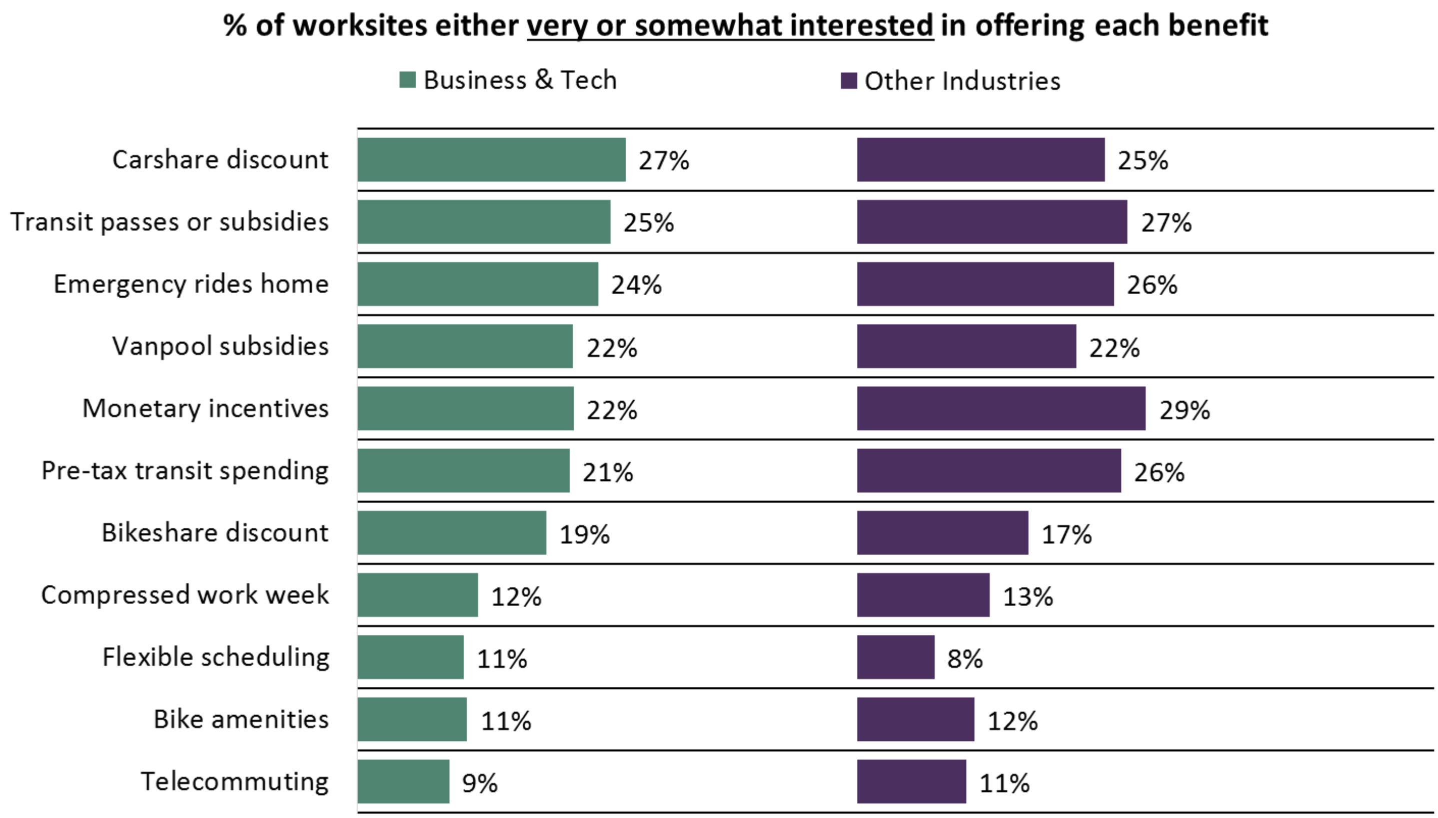


Q17-Q27. For each item, please say whether your work location already offers that benefit, or if not, ***whether you think your work location would be very interested, somewhat interested or not at all interested in offering that benefit in the future****. (Closed-ended)*

8.3 Desired Commute-Related Benefits by Industry Type

Despite the differences in current offerings by industry type (shown on page 16), demand for future benefits is fairly similar between business/tech worksites and other industries. Commute benefits including carshare, transit, vanpool, money/prize drawings, pre-tax transit allowances and bikeshare are in similar demand regardless of industry type.

Figure 8-3 – Industry Type Comparison of Commute-Related Benefits Desired



*Q17-Q27. For each item, please say whether your work location already offers that benefit, or if not, **whether you think your work location would be very interested, somewhat interested or not at all interested in offering that benefit in the future**. (Closed-ended)*

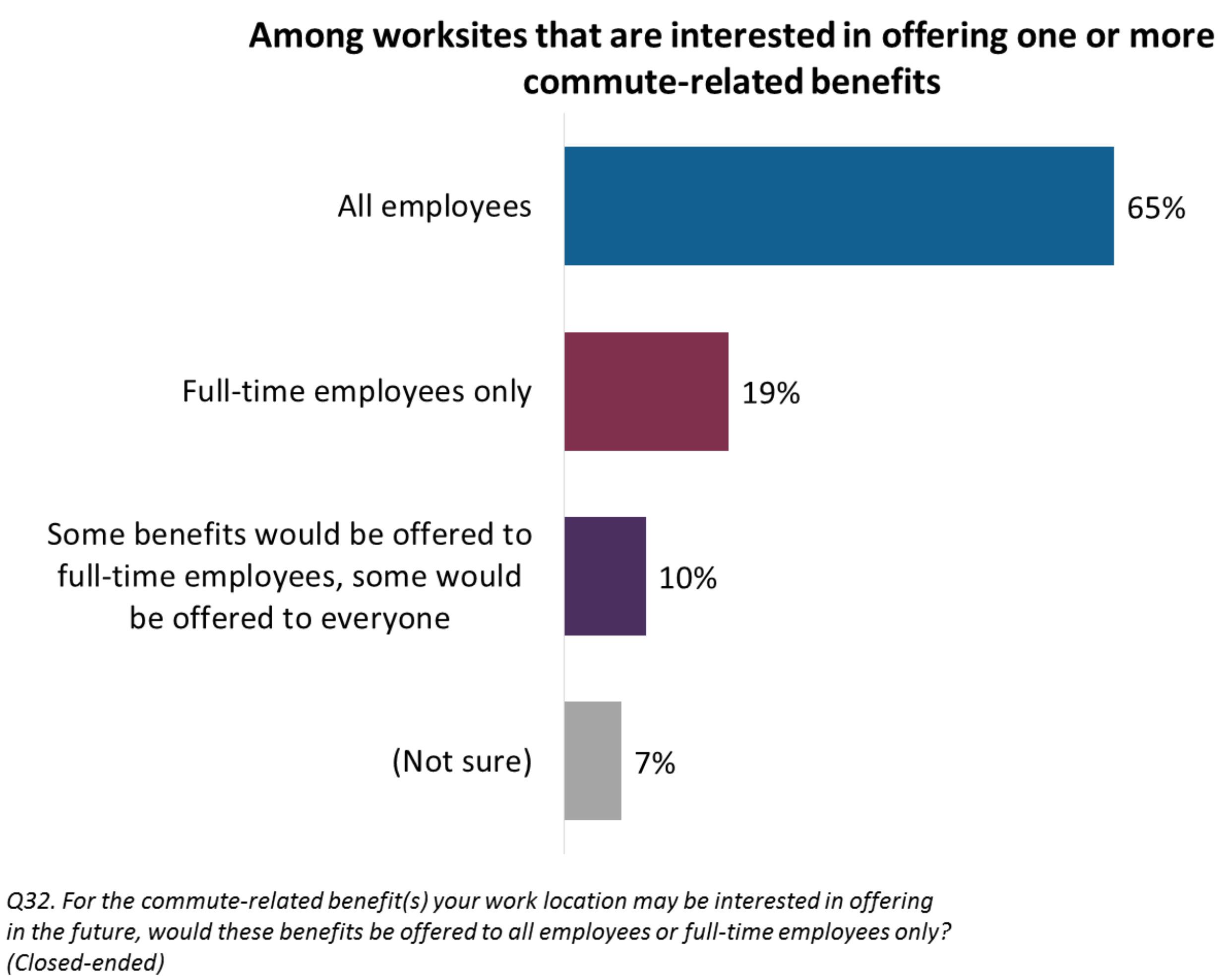
9 Barriers & Opportunities for Offering Transit Benefits

Worksites that currently offer one or more commute-related benefits were asked a series of follow-up questions to better understand the reasons their worksites have chosen not to offer benefits or what circumstances would make worksites more likely to consider offering them in the future.

9.1 Future Benefit Availability

A majority (65%) of worksites would be likely to offer commute-related benefits to all of their employees if they invested in them. About a fifth say those benefits would be limited to full-time employees only.

Figure 9-1 – Likely Availability of Future Benefits Based on Employee Status

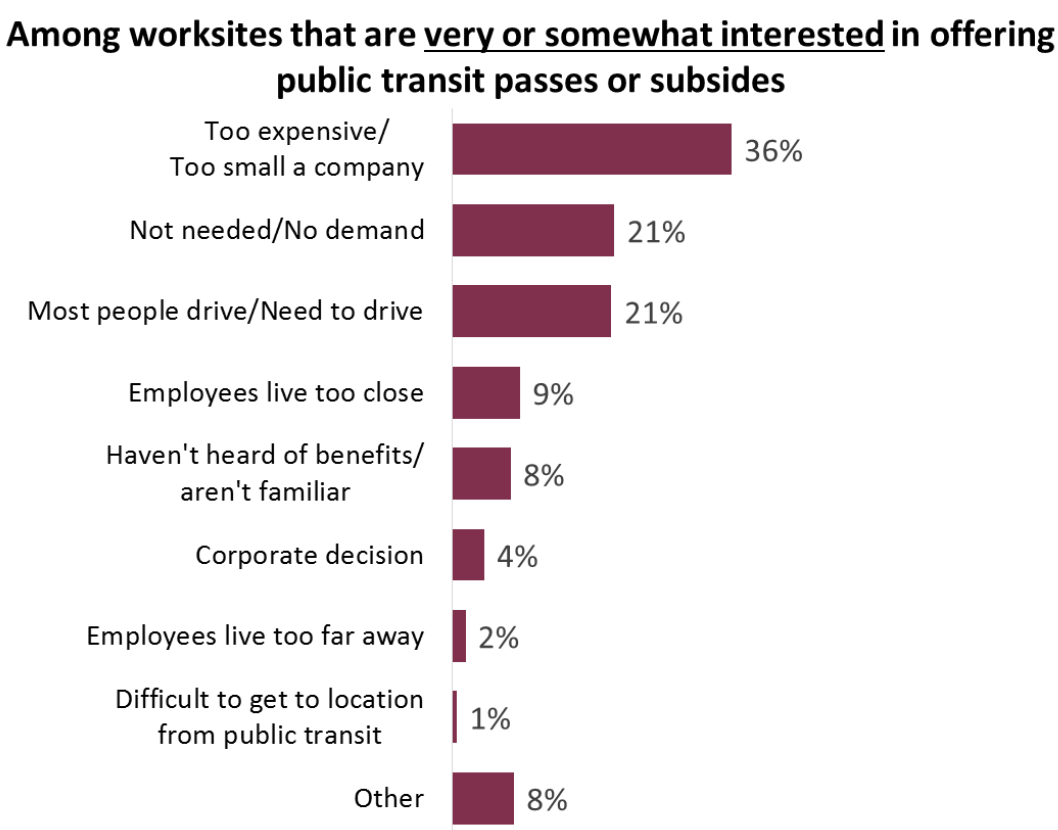


9.2 Barriers to Offering Transit Pass/Subsidy Benefits among Interested Worksites

Affordability and cost (36% mentioned) is the key barrier preventing worksites from offering transit benefits to their employees. About one fifth (21%) site a lack of demand and another fifth (21%) say that employees are reliant on driving, whether it's out of habit, necessity or required for their job.

Nearly one-in-ten (8%) suggest that familiarity with the options available, which could possibly be addressed by continued communication efforts.

Figure 9-2 – Top Barriers to Offering Transit Benefits for Interested Worksites



Q37. What are the primary reasons your work location does not offer transit benefits to its employees? (Multiple responses; open-ended; coded categories shown)

9.3 Barriers to Offering Transit Pass/Subsidy Benefits – Subgroup Comparison

Affordability concerns are most prominent among worksites with 20+ employees (47%), other service industries like retail and healthcare (39%) and those located in Center City (35%). The necessity for driving/most people drive is a unique barrier for business and technology firms.

Table 9-3 – Top Barriers to Offering Transit Benefits by Key Worksite Subgroups

All worksites, regardless of interest in transit benefits

	All Worksites	Center City	Non-CC	<20 Employees	20+ Employees	Business & Tech	Other Services
Too expensive	32%	35%	26%	28%	47%	12%	39%
Not needed	21%	19%	25%	19%	28%	19%	22%
Most people drive	18%	14%	24%	22%	4%	40%	10%
Employees live too close	10%	15%	3%	12%	4%	17%	8%
Haven't heard of	8%	8%	8%	7%	11%	5%	9%
Employees live too far away	8%	6%	11%	9%	3%	5%	8%
Corporate decision	3%	4%	0%	1%	8%	5%	2%
Difficult to get to location	1%	1%	1%	1%	1%	0%	2%
Other	7%	7%	8%	6%	14%	11%	6%

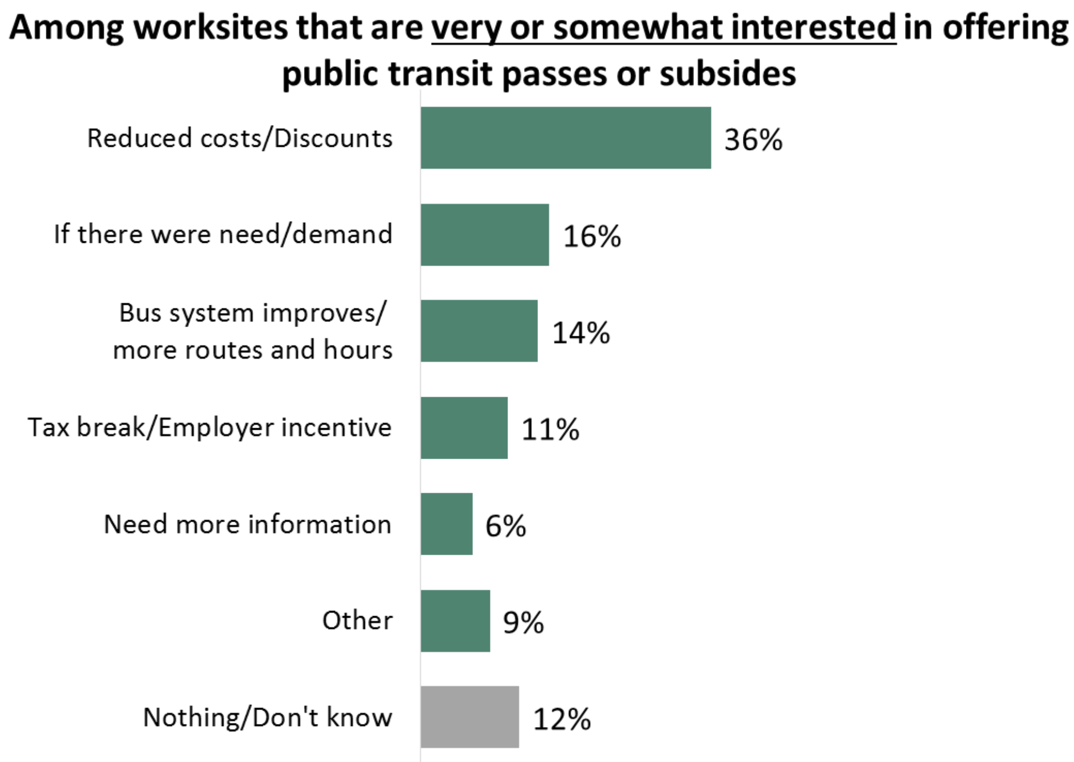
Q37. What are the primary reasons your work location does not offer transit benefits to its employees? (Multiple responses; open-ended; coded categories shown)

9.4 Opportunities for Future Transit Benefits among Interested Worksites

A plurality of worksites suggest that discounts or reduced costs (36%) or tax breaks/incentives (11%) would make them more likely to consider offering transit benefits to employees in the future.

Other worksites cite external factors like increased demand (16%) and transit system improvements (14%), while a handful of respondents (6%) suggest that additional information could be the simple solution.

Figure 9-4 – Opportunities for Offering Transit Benefits by Interested Worksites



Q38. And what, if anything, would make your worksite more likely to consider offering transit benefits to its employees in the future?
(Multiple responses; open-ended; coded categories shown)

9.5 Opportunities for Future Transit Benefits – Subgroup Comparison

Similar types of worksites – 20+ employees, Center City and other services – said they would be more likely to consider offering transit benefits if costs were reduced or if given a tax break. About a third of Ballard, Fremont and U-District worksites (36%) and Business/tech firms (32%) are unsure if any incentives would make them more likely to consider offering transit benefits.

Table 9-5 – Opportunities for Offering Transit Benefits by Key Worksite Subgroups

All worksites, regardless of interest in transit benefits

	All Worksites	Center City	Non-CC	<20 Employees	20+ Employees	Business & Tech	Other Services
Reduced Costs	30%	37%	17%	25%	46%	20%	33%
If there was need	19%	17%	24%	20%	18%	12%	23%
Bus system improves	9%	10%	8%	9%	11%	13%	8%
Tax Break	7%	7%	8%	8%	3%	7%	7%
Need more information	7%	7%	6%	7%	6%	7%	6%
Other	7%	8%	4%	6%	9%	7%	7%
Don't know/Nothing	24%	16%	36%	26%	15%	32%	20%

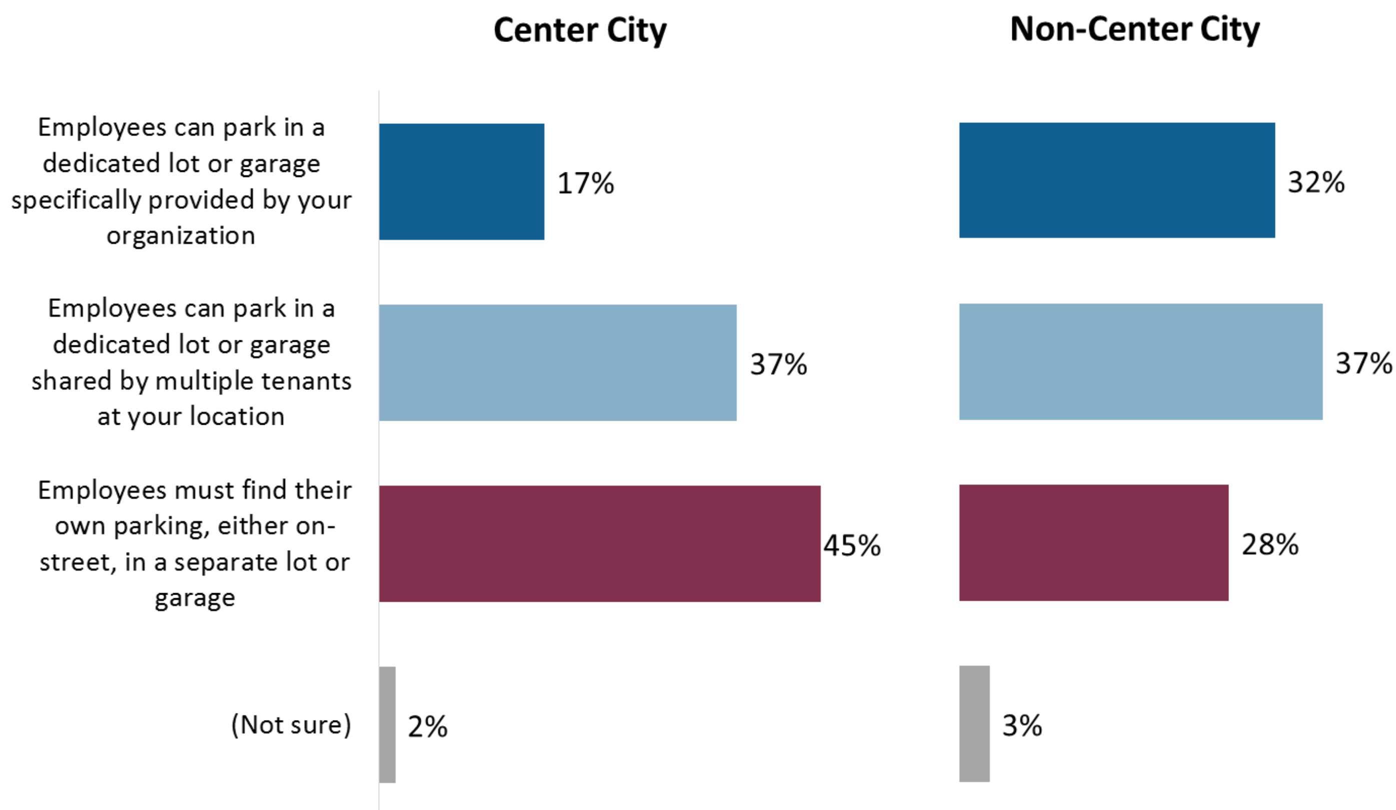
Q38. And what, if anything, would make your worksite more likely to consider offering transit benefits to its employees in the future?
(Multiple responses; open-ended; coded categories shown)

10 Parking Benefits

10.1 Current Parking Situation at Worksite

About half (54%) of Center City worksites have dedicated parking lots or garages for their employees to use while nearly as many (45%) require employees to find their own parking elsewhere. Two-thirds (69%) of worksites in Ballard, Fremont and University District provide dedicated parking for employees.

Figure 10-1 – Description of Worksite Parking Availability by Geography

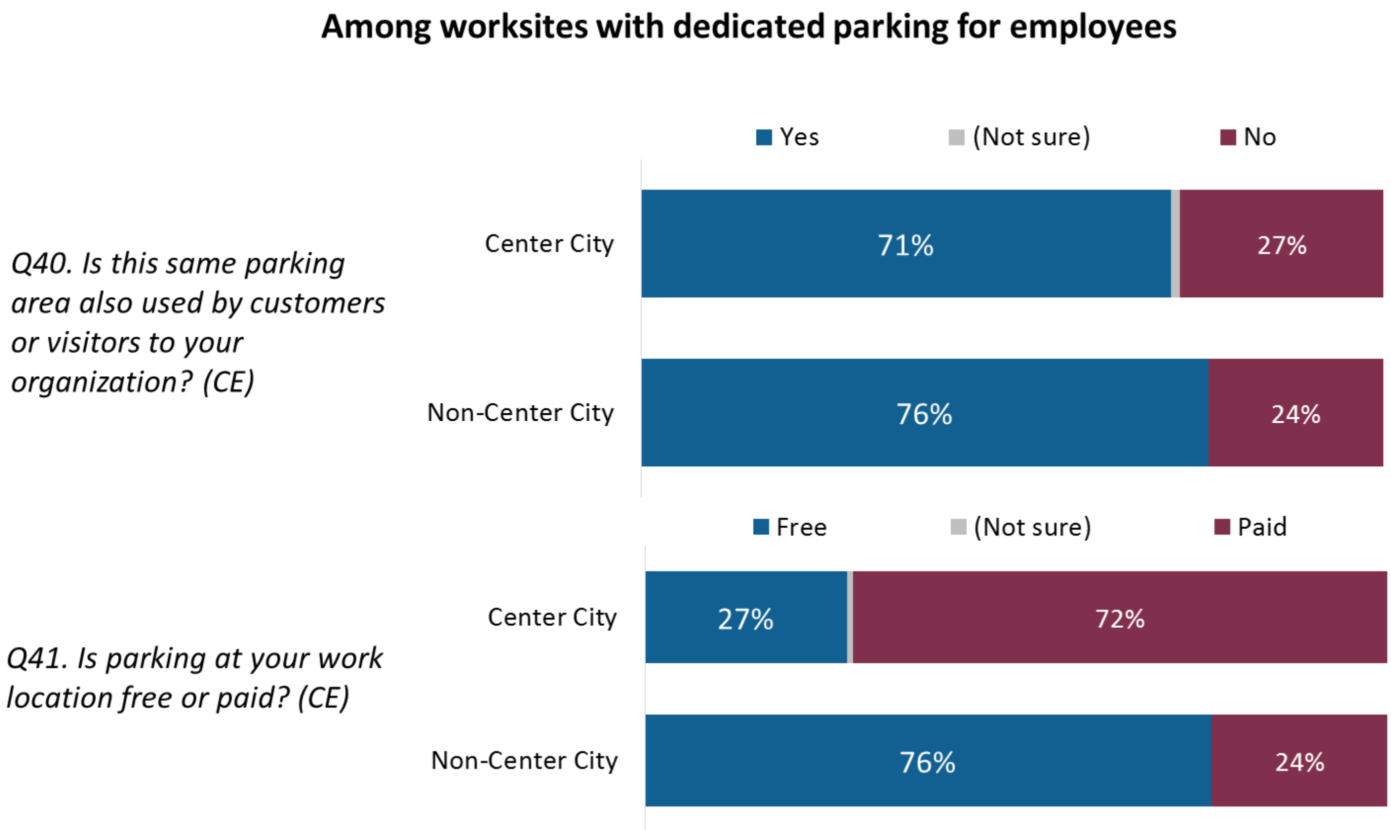


Q39. Which of the following statements best describes the parking situation for employees who drive personal vehicles to your work location? (Closed-ended)

10.2 Dedicated Parking Area Details

About three-quarters of worksites with dedicated parking lots share those lots with visitors and customers. There is a large disparity in free parking availability between neighborhoods. Three-quarters (76%) of work locations with dedicated parking in Ballard, U-District and Fremont offer it free while a majority (72%) of sites in Center City require employees to pay for parking.

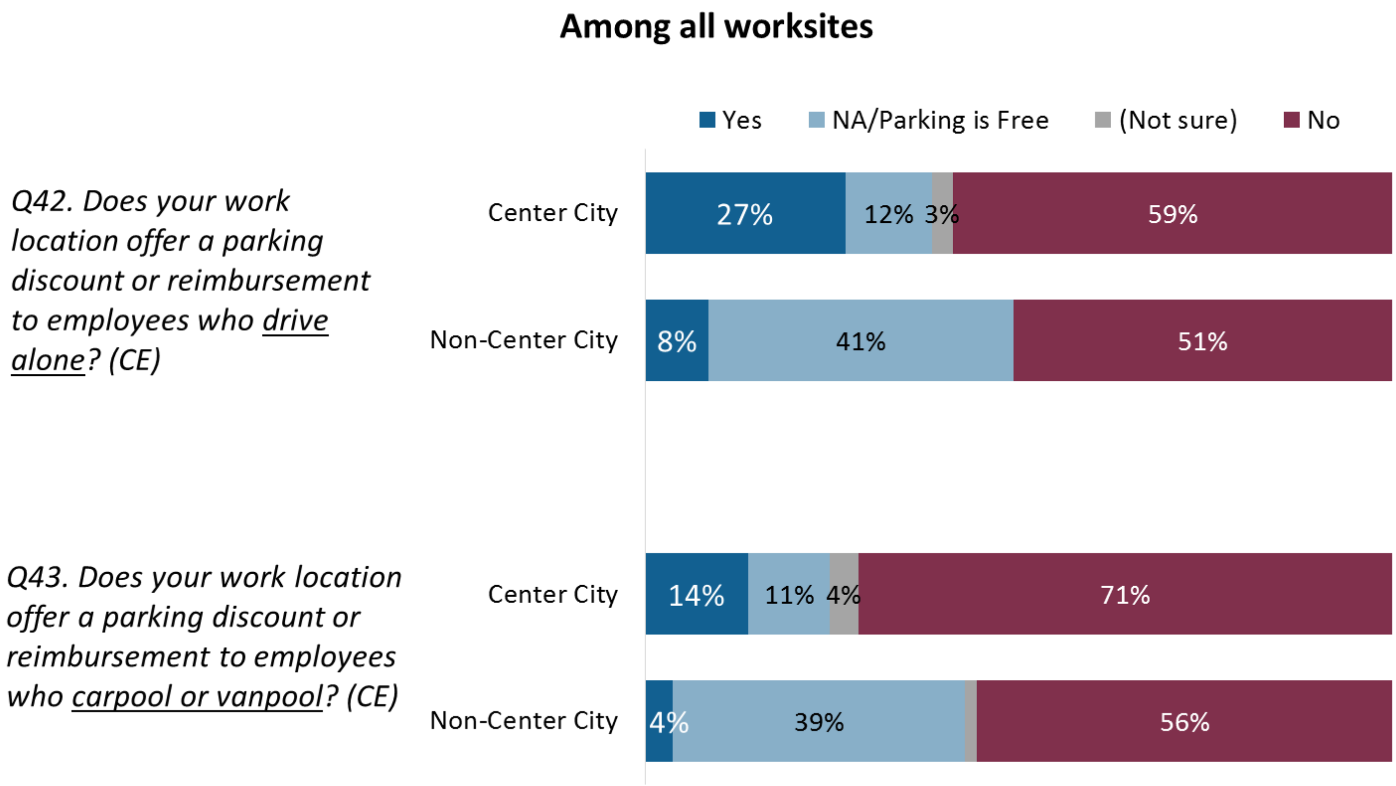
Figure 10-2 – Additional Details About Dedicated Parking Availability



10.3 Worksite Parking & Carpool/Vanpool Subsidies

A greater portion of Center City worksites offer parking and vanpool subsidies for employees.

Figure 10-3 – Parking & Carpool/Vanpool Subsidies Offered at Worksite

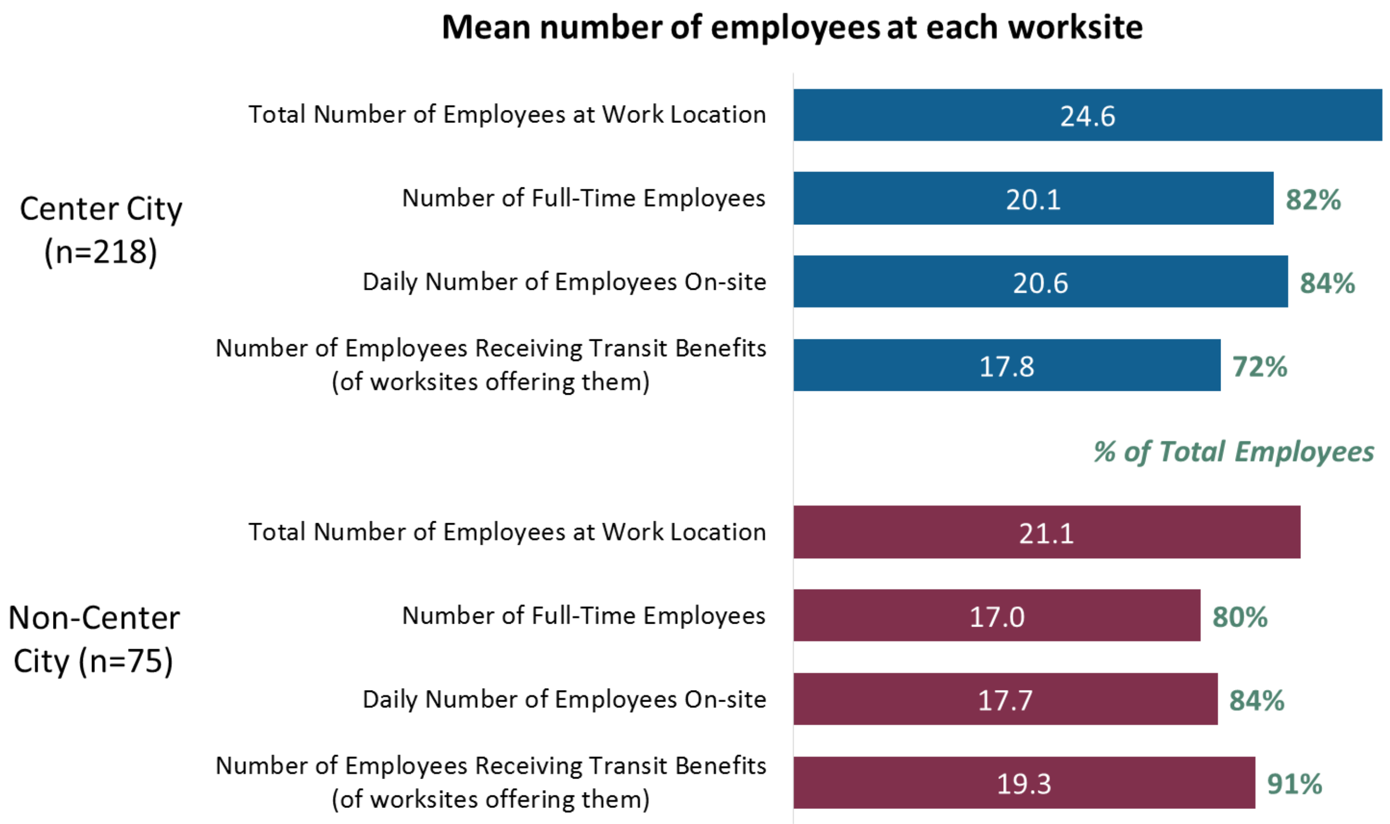


11 Expanded Worksite Profile

11.1 Average Number of Employees at Worksites

Center City worksites report a slightly higher average number of employees at their worksite in total, full time and on-site than worksites in Ballard, Fremont and U-District. However, of worksites that currently offer transit benefits, non-Center City worksites report slightly higher portions of employees who take advantage of those subsides.

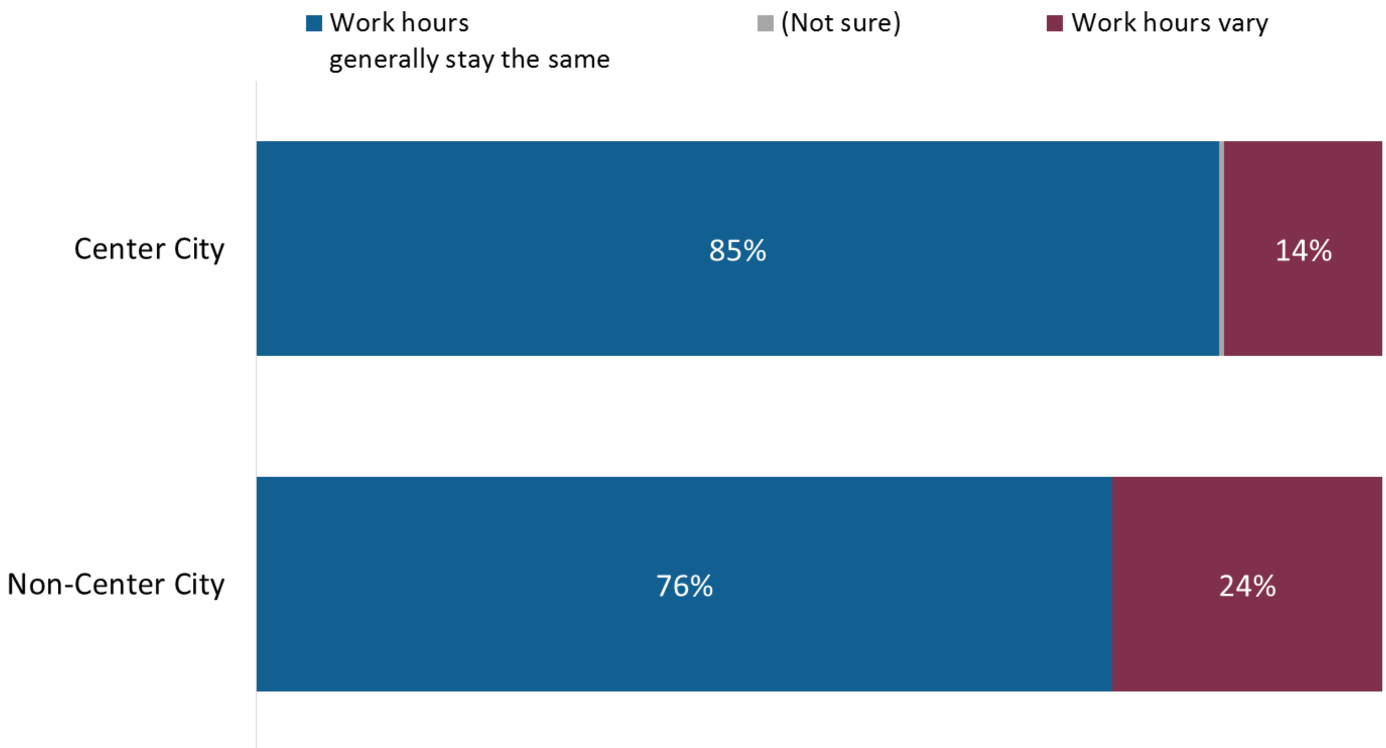
Figure 11-1 – Average Number of Employees: Total, Full-Time, On-Site & Receiving Transit Benefits



11.2 Consistency of Work Hours

A majority of worksites in both areas report having generally consistent work hours for employees. This portion is slightly higher among Center City worksites.

Figure 11-2 – Nature of Work Hour Consistency by Geography

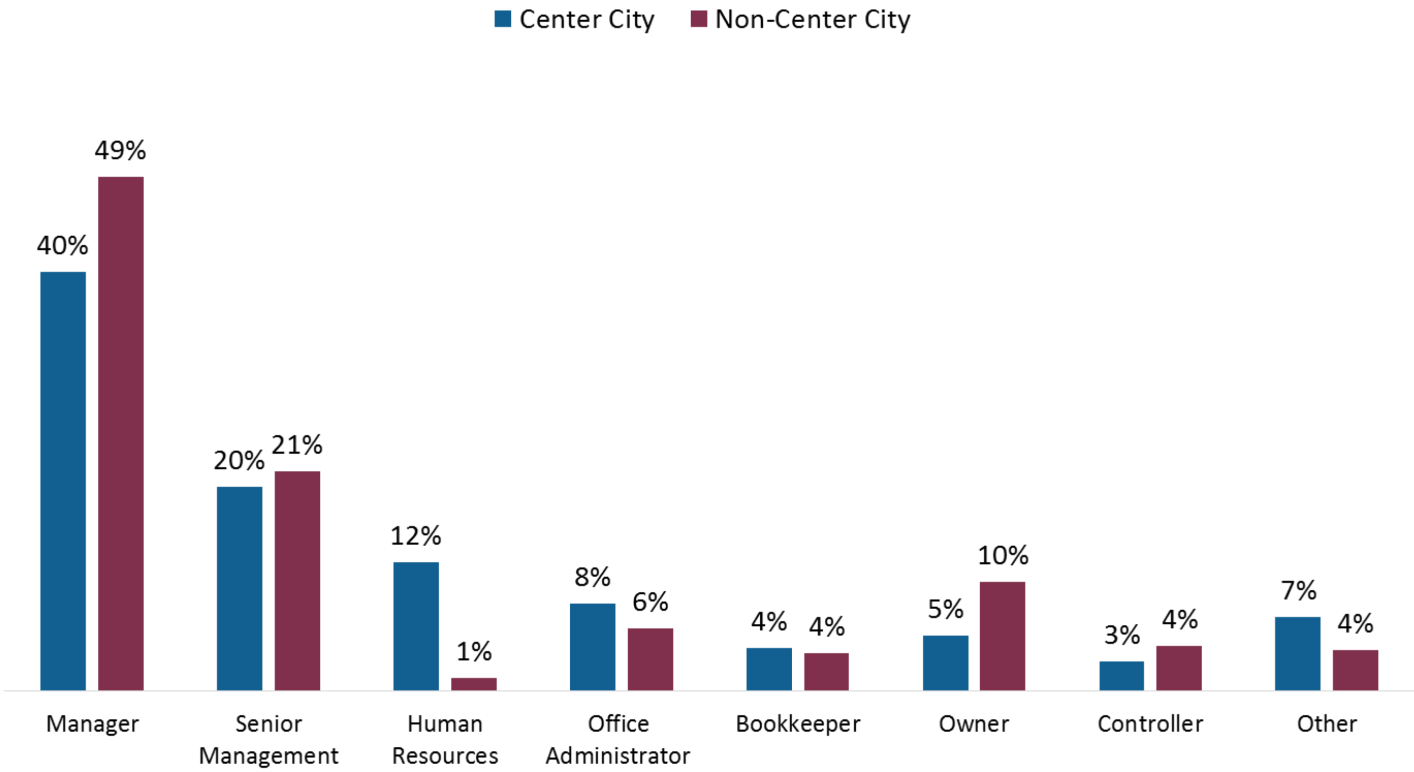


Q10. And do your employees' work hours generally stay the same from week-to-week or do they vary? (Closed-ended)

11.3 Respondent Job Title

A majority of survey respondents had some sort of management position at their worksites. Center City worksites included more human resources personnel while non-Center worksites included more business owners participating in the survey.

Figure 11-3 – Job Title of Respondents Who Participated in the Survey

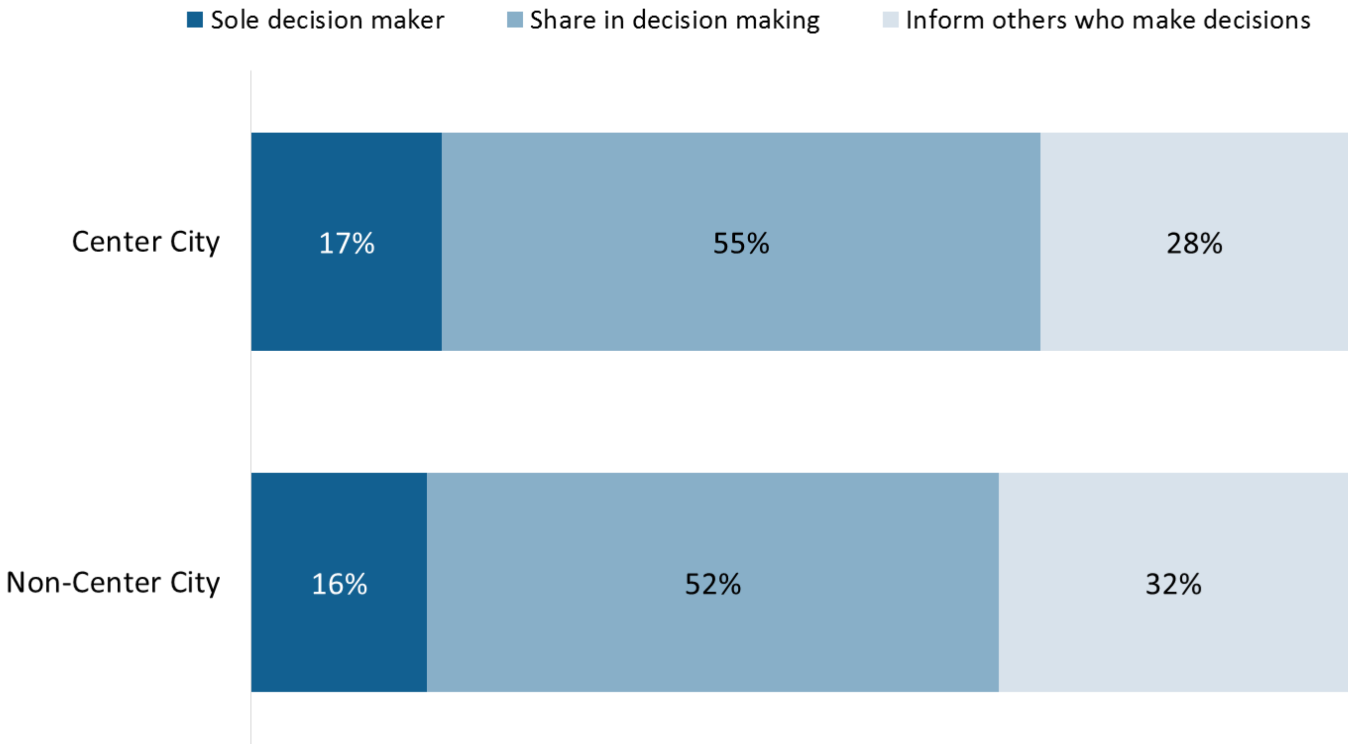


Q11. What is your job title? (Open-ended; coded categories shown)

11.4 Respondent Role in Benefits Decision Making

As a screening variable, respondents had to have at least some involvement in the decisions made about employee benefits at their worksite. A large majority of survey respondents at least share in the decision-making while just over a quarter inform others who make those decisions.

Figure 11-4 – Decision-Making Status of Respondents Who Participated in the Survey



Q3. Are you the sole decision maker about employee benefits, do you share in the decision making or do you inform others who make the decisions about employee benefits for this particular work location? (Closed-ended)

12 Appendix

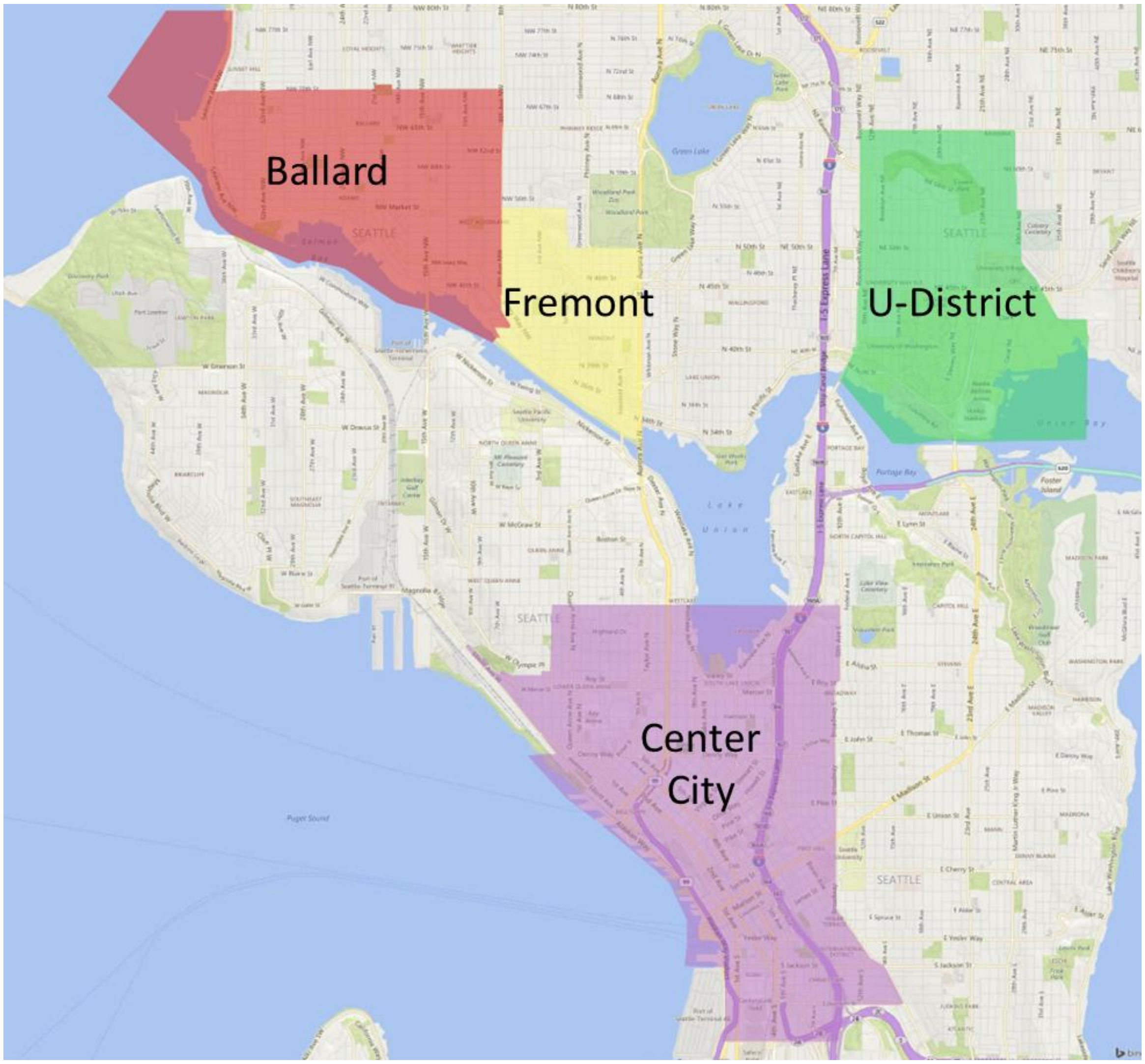
12.1 Center City, Ballard, Fremont & University District Boundaries

A map of the overall neighborhood boundaries is shown below. The Center City area (Purple) includes key Downtown Seattle neighborhoods including the Commercial Core, South Lake Union, Pioneer Square, Uptown, Belltown, Denny Triangle, First Hill, Capitol Hill and Pike/Pine sub-neighborhoods.

The neighborhoods outside of Center City were defined by Census Tracts.

- Ballard (Red) includes Tracts 32, 33 and 47 and is bordered by NW 70th to the North, 8th Ave NW to the East, Salmon Bay to the South and Shilshole Bay to the West.
- Fremont (Yellow) includes Tracts 48 and 49 and is bordered by 8th Ave NW to the West, NW 50th & 56th St to the North, Highway 99 to the East and the Fremont Cut to the South.
- U-District (Green) includes Tracts 43.01, 43.02, 44, 53.01 and 53.02 and is bordered by Roosevelt Way NE to the West, NE 65th St to the North, NE 29th Ave to the West; and Portage Bay, the Montlake Cut and Union Bay to the South.

Figure 12-1 – Neighborhood Boundary Map



12.2 Weighting Table

The estimated proportions of worksites were weighted by neighborhood and estimated worksite size based on the full Seattle business counts provided by Scientific Telephone Samples (STS). Each neighborhood (Center City, Ballard, Fremont and University District) was weighted to its total estimated proportion of the combined universe of worksites in all four areas. The data was also weighted to the estimated proportions of worksite size categories.

Table 12-1 – Worksite Neighborhood and Size Weighting Proportions

Worksite Category	Unweighted n	Unweighted %	Weighted n	Weighted %
Center City	218	74%	227	77%
Ballard	40	14%	28	10%
Fremont	15	5%	12	4%
University District	20	7%	26	9%
0-4 Employee Worksites	*N/A – Screened out of survey*			
5-9 Employees	83	28%	129	44%
10-19 Employees	69	24%	73	25%
20-49 Employees	73	25%	56	19%
50-99 Employees	37	13%	25	8%
100+ Employees	31	11%	10	3%

12.3 Pre-Notification & Invitation Letter

To whom it may concern:

We are conducting a survey of local employers in Seattle and would appreciate your worksite's participation in this study. This survey is about the employee benefits offered at your work location and we are asking for help from either you or another person from your worksite who is the most knowledgeable about employee benefits, whether they are involved with making those decisions or inform others who make those decisions for your worksite. Your worksite's participation will help support our continuing efforts to improve commuting options and transportation access to and within Seattle. We request that only one person from your organization participates in the survey on behalf of your worksite.

The survey will take about 12-15 minutes to complete and the one person from your work location who qualifies and participates in the survey will receive a $25 VISA gift card for their time. The survey will contain questions about transportation access to your worksite and the employee benefits your company may offer currently and in the future. This information will help King County, SDOT and Commute Seattle better understand the benefits that are available to employees and how they are valued by employers in Seattle. These results will inform City and County programs to help make certain benefits more easily available to Seattle businesses and non-profits.

Please participate in the survey online at the web address below:

www.seattleemployersurvey.com

Alternatively, we will also conduct this survey by phone. In the next couple of weeks, someone from Interviewing Service of America (ISA) and EMC Research, two experienced professional research firms, may call your worksite to complete this survey if you would prefer to participate by phone instead of online.

All survey responses will be kept strictly confidential and your survey answers will not be associated with your company or shared with any outside party. If you have any questions you may contact the project manager Brian Vines at brian@emcresearch.com.

Thank you in advance for taking part in this research effort.

Sincerely,

Jessica Szelag
Executive Director
www.commuteseattle.com

Commute Seattle is a not-for-profit commuter service organization working to reduce drive-alone commute trips and ensure commuters are knowledgeable about the variety of transportation options they have for getting to work in Seattle. Commute Seattle is an alliance between the Downtown Seattle Association, King County Metro and the City of Seattle.

12.4 Full Questionnaire & Topline Results

Telephone/Web Survey of Worksites with 5 or More Employees
Conducted December 19, 2015 - January 13, 2016
Overall n=293; Margin of Error = ± 5.7 pts
Downtown Seattle/Center City: n=218; MoE= ± 6.6 pts
Outside of Center City (Ballard/Fremont/University District): n=75; MoE= ± 11.3 pts
EMC Research #15-5766

All numbers in this document represent percentage (%) values, unless otherwise noted.
Please note that due to rounding, percentages may not add up to exactly 100.

INTRO
Hello, my name is ________. Did I reach **(INSERT BUSINESS NAME FROM SAMPLE)**?
I am conducting a survey with Seattle businesses on behalf of King County, the City of Seattle and Commute Seattle. Your worksite may have received a letter in the mail about this study. For this project, we would like to speak to one person at your work location who is involved in making decisions about employee pay and benefits offered at your worksite. Are you the best person to talk to? **[ASK TO BE TRANSFERRED TO INDIVIDUAL OR SCHEDULE CALLBACK IF UNAVAILABLE]**
[**IF NEEDED**: Your business was randomly selected to represent similar-sized businesses in Seattle and it is important that we ensure your work location is represented in the data we're collecting. Your answers will be kept strictly confidential and will not be connected to you or your worksite.]

X. Seattle Neighborhood **(RECODED FROM ADDRESS)**

Downtown Seattle	77	%
Ballard	10	
Fremont	4	
University District	9	

1. Are you directly involved in making or informing the decisions about employee pay and benefits offered to employees at your work location?

2. **(IF Q1=NO, ASK)** May I speak to someone who is involved in making or informing decisions about employee benefits for this work location?

(RESUME ASKING EVERYONE)

3. And are you the sole decision maker about employee benefits, do you share in the decision making or do you inform others who make the decisions about employee benefits for this particular work location?

	Overall	Center City	Non-Center City
Sole decision maker	17	17	16
Share in decision making	54	55	52
Inform others who make decisions	29	28	32

5. What is the name of your organization? **(RECORD VERBATIM RESPONSE AND CONFIRM CORRECT SPELLING)**

[RESUME ASKING EVERYONE]

7. What is the street address for your particular work location in **[QX NEIGHBORHOOD]**?**RECORD STREET ADDRESS & CONTINUE)**

[RESUME ASKING EVERYONE]

8. How many employees are based at your particular work location at **[CONFIRMED ADDRESS IN Q7]** at **[QX NEIGHBORHOOD]**? **(RECORD NUMBER) [TERMINATE IF 0-4; CONTINUE IF 5 OR MORE]**

	Overall	Center City	Non-Center City
5-9	44	43	49
10-19	25	26	22
20-49	19	18	22
50-99	8	10	5
100+	3	4	3

[END SCREENING VARIABLES]

Thank you for answering our qualification questions. This survey will take approximately 12-15 minutes to complete and in appreciation of your time, you will receive a $25 VISA gift card for participating. As I mentioned earlier, this survey is being conducted on behalf of King County, the City of Seattle and Commute Seattle.

9. Of the **(INSERT NUMBER OF EMPLOYEES FROM Q8)** employees at your particular work location, about how many are full-time employees? Full-time employment is defined as working 35 hours or more per week. **(RECORD NUMBER OF FULL-TIME EMPLOYEES) [ADD VALIDATION – NUMBER OF EMPLOYEES IN Q9 CANNOT EXCEED THE NUMBER OF EMPLOYEES IN Q8]**

	Overall	Center City	Non-Center City
0-4	14	12	21
5-9	37	37	38
10-19	25	26	23
20-49	13	13	13
50-99	8	10	3
100+	2	2	3

10. And do your employees' work hours generally stay the same from week-to-week or do they vary?

	Overall	Center City	Non-Center City
Work hours generally stay the same	83	85	76
Work hours vary	16	14	24
(Not sure)	0	0	-

	Overall	Center City	Non-Center City
11. What is your job title? **(RECORD VERBATIM)**			
Manager (Accounting, Office, General)	42	40	49
Owner	6	5	10
Human Resources	10	12	1
Senior Management	20	20	21
Office Administrator/Secretary	8	8	6
Bookkeeper	4	4	4
Controller	3	3	4
Other	6	7	4

12. On a typical day, about how many of the **[INSERT NUMBER OF EMPLOYEES FROM Q8]** employees based at your particular location work **on-site**? Your best estimates are fine.

	Overall	Center City	Non-Center City
0-4	11	10	16
5-9	39	38	43
10-19	25	26	18
20-49	15	14	16
50-99	7	8	3
100+	2	2	3

[ADD VALIDATION –NUMBER OF EMPLOYEES IN Q12 CANNOT EXCEED TOTAL FROM Q8]

14. Are decisions about your worksite's employee benefits made locally or by another location or headquarters outside of the Puget Sound area?

	Overall	Center City	Non-Center City
Benefits decisions made locally	89	88	90
Benefits decisions made outside of the Puget Sound area	10	11	8
Other **(SPECIFY)**	1	1	-
(Not sure)	0	-	2

15. Is your organization a for-profit business, a non-profit organization or a government agency?

	Overall	Center City	Non-Center City
For-profits business	86	85	92
Non-profit organization	13	15	8
Government agency	0	0	-
Other	0	0	-

	Overall	Center City	Non-Center City
16. What is your industry? **(RECORD VERBATIM; PROBE FOR DETAILS)**			
Agriculture/forestry/fishing/mining	3	1	10
Finance/Insurance/Real estate	12	13	7
Info. Services/Software/Technical	6	7	3
Professional/Personal services	6	6	7
Retail/Trade	7	6	12
Manufacturing	2	1	8
Healthcare	12	11	12
Architecture	3	3	-
Fine Arts	2	3	-
Construction/Landscape	5	4	6
Transportation	0	0	-
Government	1	2	-
Education	2	2	3
Legal services	13	17	-
Food and Beverage	6	6	6
Hotels/Lodging/Hospitality	5	4	6
Advertising/Printing/Public relations	2	2	3
Non-Profit	2	3	2
Automotive	1	0	2
Other	10	9	13

I'm going to read a list of benefits that worksites could offer to employees. **(REPEAT BEFORE EACH UNTIL UNDERSTOOD)** For each item, please say whether your work location already offers that benefit or, if not, whether you think your work location would be very interested, somewhat interested or not at all interested in offering that benefit in the future. Again, if your work location already offers that benefit, please just say so. **(IF "NOT OFFERED" ASK)** And do you think your work location would be very interested, somewhat interested or not at all interested in offering that benefit in the future?

SCALE:	Already offers that benefit	Very interested	Somewhat interested	Not at all interested	(Not sure)
[RANDOMIZE]					
17. Transit passes or subsidies, including ORCA cards or other transit fare reimbursements					
Overall	46	11	16	25	2
Center City	54	12	15	15	3
Non-Center City	17	5	18	59	-
18. Vanpool fare subsidies					
Overall	8	5	17	66	4
Center City	9	6	18	61	6
Non-Center City	2	2	13	82	1

SCALE:	Already offers that benefit	Very interested	Somewhat interested	Not at all interested	(Not sure)
19. Ability for employees to set aside a portion of their pre-tax income to spend on transit or vanpool fare					
Overall	18	5	19	51	7
Center City	21	6	20	45	9
Non-Center City	7	3	17	70	3
20. Emergency rides home for employees who have not used a car to get to work					
Overall	35	10	15	34	6
Center City	35	12	17	31	6
Non-Center City	34	4	11	44	7
21. Flexible scheduling allowing employees to set their start and end times to meet their needs					
Overall	50	2	7	36	4
Center City	54	2	7	31	5
Non-Center City	39	2	5	53	2
22. Compressed work week to allow employees to work a full-time work week in fewer days. For example, allowing employees to work four ten-hour days instead of five eight hour days.					
Overall	27	1	12	54	6
Center City	27	1	12	54	6
Non-Center City	27	0	12	56	6
23. Permission to work from home on a regular schedule, often called telecommuting or teleworking					
Overall	27	3	7	59	4
Center City	32	3	8	53	4
Non-Center City	8	5	2	82	3
24. Employer discount for a carshare membership including Zipcar or Car2Go					
Overall	7	5	20	63	4
Center City	8	7	24	57	4
Non-Center City	4	1	7	85	2
25. Employer discount for a Pronto bikeshare membership					
Overall	2	3	15	71	9
Center City	2	3	18	67	10
Non-Center City	2	2	4	85	6
26. Monetary benefits or drawings for employees who carpool, bike or walk to work instead of drive alone					
Overall	7	8	18	64	3
Center City	7	9	20	60	4
Non-Center City	7	3	11	78	1
27. Amenities provided by your organization or property management for employees who bike to work, such as secure bike racks, cages, lockers or showers					
Overall	49	4	7	36	4
Center City	52	5	9	30	5
Non-Center City	42	3	1	54	-

[END RANDOMIZE]

SCALE:	Already offers that benefit	Very interested	Somewhat interested	Not at all interested	(Not sure)

28. **[ALWAYS ASK AFTER Q17-Q27]** Other commute-related benefits or assistance **(PLEASE SPECIFY)**

[IF ANY TRANSPORTATION BENEFITS OFFERED/ANY Q17-Q28=1, ASK Q29-31; ELSE SKIP TO Q32]

	Already offers that benefit	Very interested	Somewhat interested	Not at all interested	(Not sure)
Overall	6	2	3	65	24
Center City	5	3	3	60	28
Non-Center City	7	1	-	83	10

29. For the commute-related benefits your work location **currently offers**, are these benefits offered to all employees or full-time employees only? **(n=233)**

	Overall	Center City	Non-Center City
All employees	73	71	79
Full-time employees only	14	17	3
Some benefits offered to full-time employees, some offered to everyone	9	8	11
(Not sure)	4	3	7

30. How do your employees usually hear about the commute-related benefits your work location offers? **(SELECT ALL THAT APPLY)**

	Overall	Center City	Non-Center City
Employee orientation	65	67	53
Posters	7	7	10
E-mails or memos	34	34	31
Word of mouth	48	46	58
Employee handbook or intranet	36	38	30
Other **(SPECIFY_____)**	2	2	5
(Not sure)	3	2	7

31. Are there any other transportation-related incentives or benefits that your worksite is considering offering to employees in the next 12 months? **(n=243)**

	Overall	Center City	Non-Center City
Yes → **(ASK FOLLOWUP)**	4	3	8
No	87	88	87
(Not sure)	8	9	5

[IF ANY Q17-28=2 OR 3, ASK Q32; ELSE SKIP TO Q33INT]

32. For the commute-related benefit(s) your work location **may be interested in offering in the future**, would these benefits be offered to all employees or full-time employees only? **(n=183)**

	Overall	Center City	Non-Center City
All employees	65	64	65
Full-time employees only	19	19	22
Some benefits offered to full-time employees, some offered to everyone	10	10	8
(Not sure)	7	7	5

[IF Q17=1 OR Q18=1 OR Q19=1, ASK Q33INT-Q36; ELSE SKIP TO Q37INT]

These next questions are specifically about transit-related benefits that your work location offers, including ORCA cards and other reimbursements or subsidies for public transit, vanpool or vanshare.

33. Through which particular program does your work location offer employee transit benefits? **(READ LIST IF NECESSARY) (n=164)**

	Overall	Center City	Non-Center City
ORCA Business Choice	19	18	36
ORCA Business Passport	27	28	20
Choice Strategies / TransitChek / WageWorks	3	3	6
Other **(SPECIFY________)**	14	15	4
Worksite purchases and gives ORCA cards to employees directly	24	24	20
None of the above	7	8	-
(Not sure)	5	4	15

34. How many of the **[INSERT NUMBER OF EMPLOYEES FROM Q8]** employees at your work location receive transit benefits from your organization? **(RECORD NUMBER) [VALIDATION – RESPONSE IN Q34 SHOULD NOT EXCEED Q8] (n=164)**

	Overall	Center City	Non-Center City
0-4	28	26	48
5-9	27	29	9
10-19	18	19	7
20-49	16	15	25
50-99	9	9	9
100+	2	2	1

35. How much of the **monthly** transit pass cost is paid for by the employer, per employee? **(RECORD DOLLAR AMOUNT) (n=164)**

	Overall	Center City	Non-Center City
$0 - $39	20	20	25
$40 - $99	27	28	19
$100 - $200	35	34	48
$201 +	11	12	6
Other	7	7	3

36. To your knowledge, what are the primary reasons your work location offers transit benefits to its employees? **(RECORD OPEN ENDED RESPONSE, PROBE FOR UP TO THREE RESPONSES)**

	Overall	Center City	Non-Center City
Hiring incentive/Increase employee satisfaction	62	63	62
Parking issues/parking is expensive	27	28	10
Environment	12	11	17
Encourages use of public transportation	9	10	4
Convenient location	4	3	7
Required by City of Seattle	1	0	1
Other	3	2	6
Don't know/NA	8	7	11

[IF TRANSIT BENEFITS NOT OFFERED, Q17≠1 AND Q18≠1 AND Q19≠1 , ASK Q37INT-Q38; ELSE SKIP TO Q39INT]

Thinking specifically about transit-related benefits, including ORCA cards and other reimbursements or subsidies for public transit, vanpool or vanshare…

37. What are the primary reasons your work location does *not* offer transit benefits to its employees? **(RECORD OPEN ENDED RESPONSE, PROBE FOR UP TO THREE RESPONSES)**

	Overall	Center City	Non-Center City
Too expensive/Too small a company	32	35	26
Not Needed/No Demand	21	19	25
Most people drive/ Need to Drive	18	14	24
Employees live too close	10	15	3
Haven't heard of benefits/ aren't familiar	8	8	8
Employees live too far away	8	6	11
Corporate decision	3	4	-
Do offer benefits	2	3	2
Difficult to get to location from public transit	1	1	1
Other	5	5	6

38. And what, if anything, would make your worksite more likely to consider offering transit benefits to its employees in the future? **(RECORD OPEN ENDED RESPONSE, PROBE FOR UP TO THREE RESPONSES)**

	Overall	Center City	Non-Center City
Reduced Costs/Discounts	30	37	17
If there was need/demand	19	17	24
Bus system improves/more routes and hours	9	10	8
Tax Break/Employer incentive	7	7	8
Need more information	7	7	6
Already offer	2	2	2
Other	7	8	4
Nothing/Don't Know	24	16	36

	Overall	Center City	Non-Center City

[RESUME ASKING EVERYONE]

For the next couple of questions, think about the parking for employees who drive to your work location.

39. Which of the following statements best describes the parking situation for employees who drive personal vehicles to your work location? **(READ RESPONSES)**

	Overall	Center City	Non-Center City
Employees can park in a dedicated lot or garage specifically provided by your organization	20	17	32
Employees can park in a dedicated lot or garage shared by multiple tenants at your location	37	37	37
Employees must find their own parking, either on-street, in a separate lot or garage	41	45	28
(Not sure)	2	2	3

(IF Q39=1 OR 2, ASK Q40-Q41; ELSE SKIP TO Q42 & Q43)

40. Is this same parking area also used by customers or visitors to your organization? **(n=172)**

	Overall	Center City	Non-Center City
Yes	73	71	74
No	26	27	26
(Not sure)	1	1	-

41. Is parking at your work location free or paid? **(n=172)**

	Overall	Center City	Non-Center City
Free	41	27	76
Paid	59	72	24
(Not sure)	1	1	-

[RESUME ASKING EVERYONE]

[ROTATE Q42 & Q43]

42. Does your work location offer a parking discount or reimbursement to employees who drive alone?

	Overall	Center City	Non-Center City
Yes	23	27	8
No	57	59	51
Not applicable/Parking is free	18	12	41
(Not sure)	2	2	-

43. Does your work location offer a parking discount or reimbursement to employees who carpool or vanpool?

	Overall	Center City	Non-Center City
Yes	12	14	4
No	68	71	56
Not applicable/Parking is free	17	11	39
(Not sure)	3	4	2

THANK YOU!