

Survey Results: Commuter Benefit Survey for Small & Medium Size Businesses

Commuter Seattle

Fall 2020



Survey Overview



Responses collected September 16 - 30th
86 valid responses



Respondents were asked about their
benefits **before** the pandemic



Primarily businesses with fewer than 100
employees in Seattle

Summary

Survey Purpose

The statewide Commute Trip Reduction Program collects data about large employers in two ways:

1. Employee commute survey (non-CTR employees participate in the biennial Mode Split Study)
2. Program reports about employer commute benefits

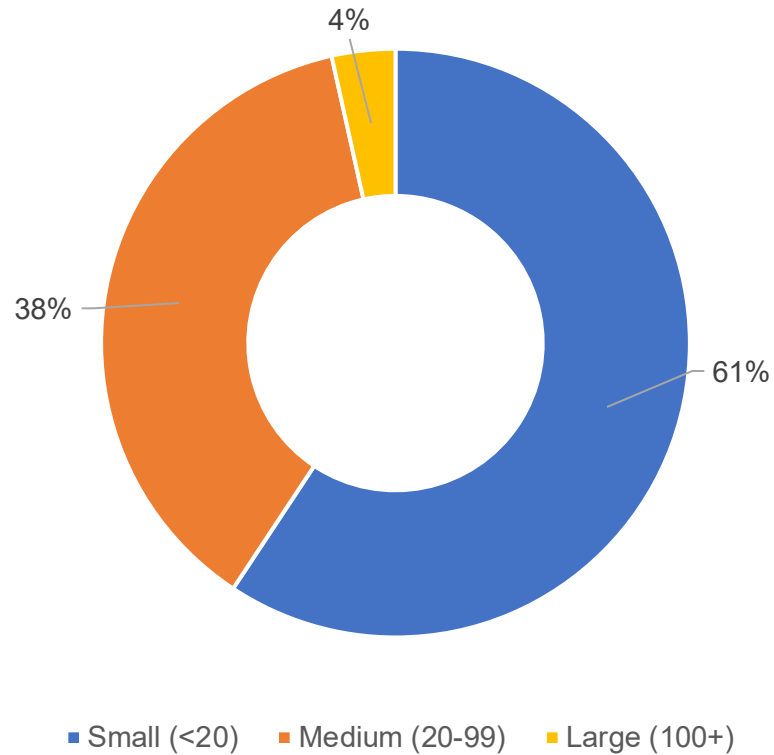
This Commuter Benefit survey is intended to pilot a program report procedure for non-CTR employers.

Initial Learning Outcomes

- Permanent increases in telework numbers and frequency are the most anticipated impact of COVID-19. Several of these employers are considering downsizing or eliminating their Seattle worksite.
- Many employers are confused about compliance with the Commuter Benefit Ordinance while staff are working remotely, and several employers referred to the program as a “mandatory ORCA benefit,” suggesting confusion about how to comply.
- 57% of participants were not aware of the Commuter Benefit Ordinance
- ORCA is the most common commuter benefit offered, while active commute, carpool and vanpool benefits are extreme limited.
- 33% offer reserved spaces for SOV drivers, and 21% offer drivers free parking.

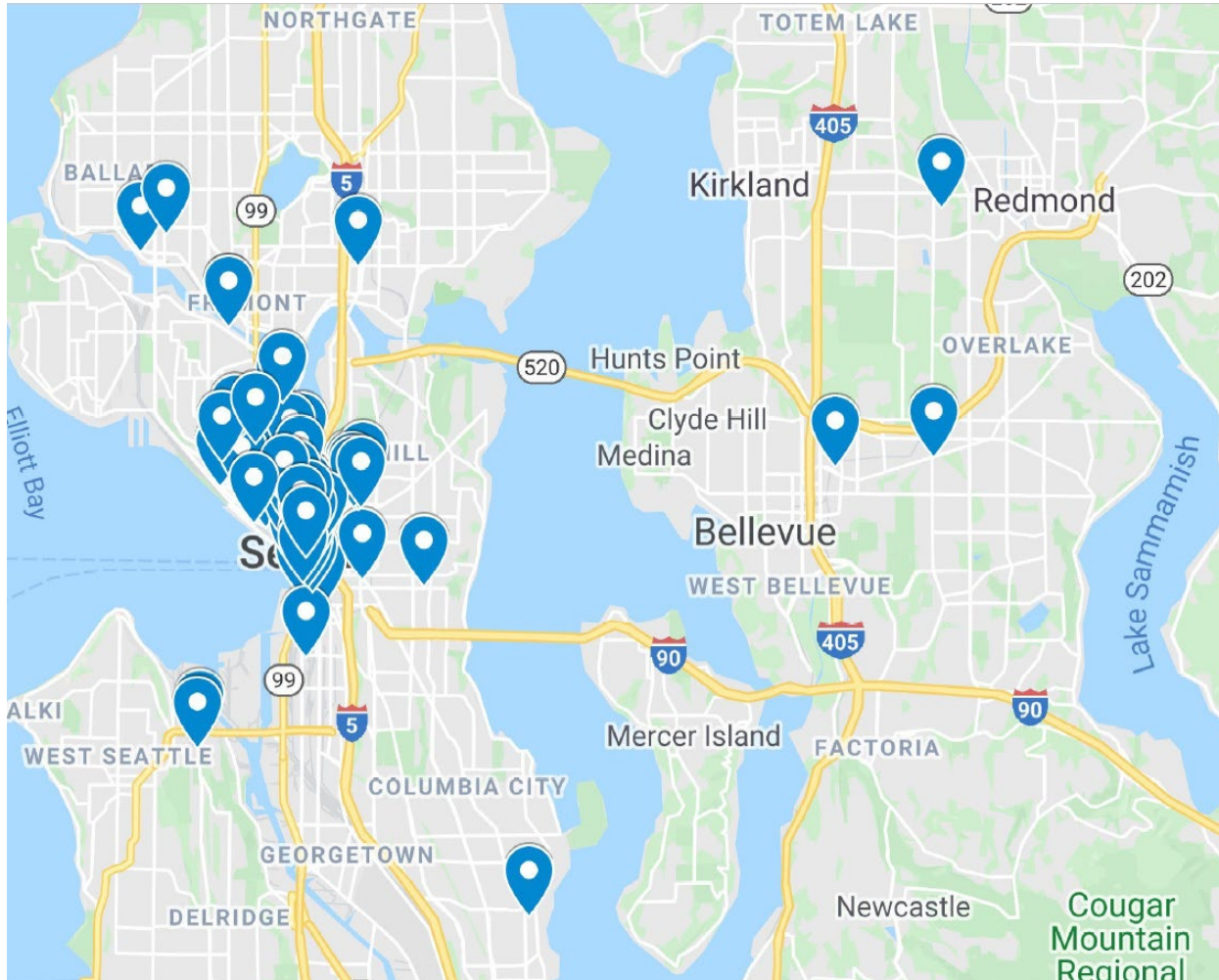
Participant Demographics

Pre-COVID Employees at Worksite



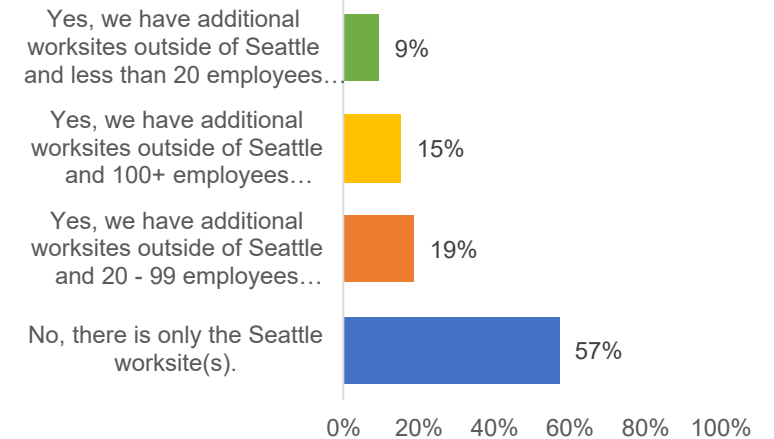
- Wide variety of industries, including retail, hospitality, and small offices
- 2/3 reported more than 75% of their workforce commuted at peak hours
- Overall, company culture is very supportive of sustainable transportation options (8.6/10)
- Commute benefits primarily administered by a staff person in HR or management
- Most commute information shared in new employee orientation and a new hire packet
- 20% of businesses said there is no on-site staff to help employees with commutes

Worksite Locations



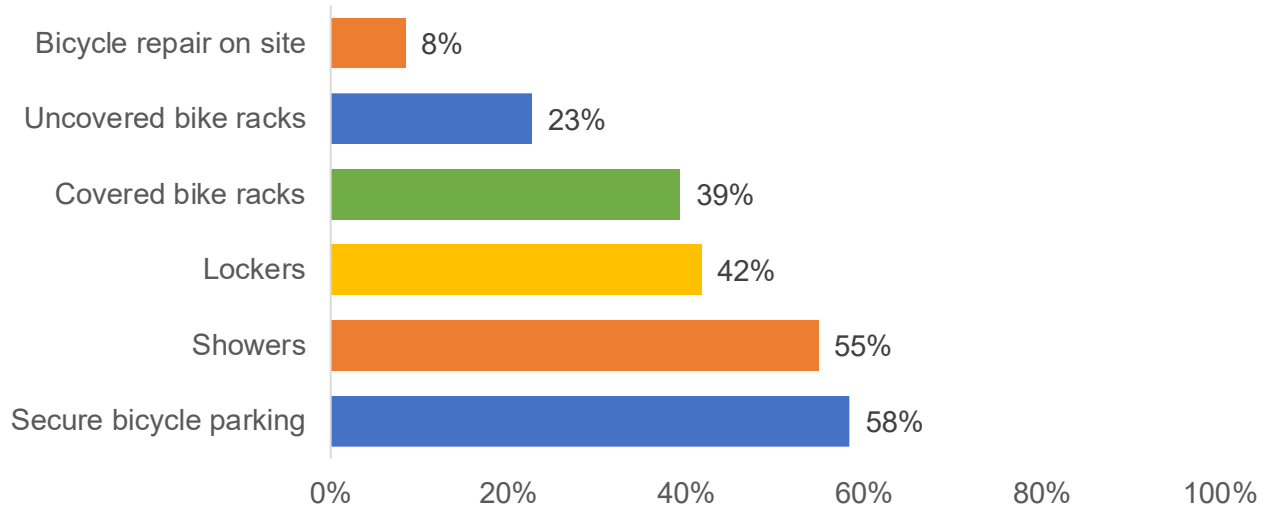
- All respondents were asked to describe their Seattle office, but 43% reported having worksites outside of Seattle.

Is the Seattle worksite(s) part of a larger company with multiple worksites?

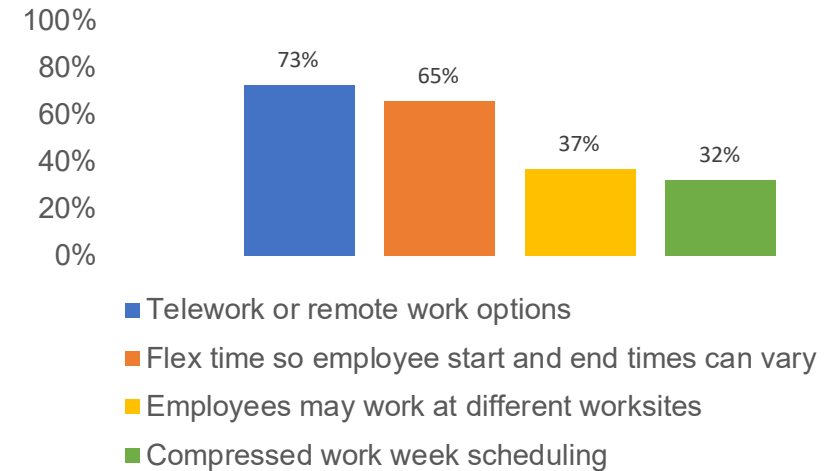


Amenities & Options

Do employees have access to the following active transportation amenities at your worksite:



Do employees at this site have the following options:

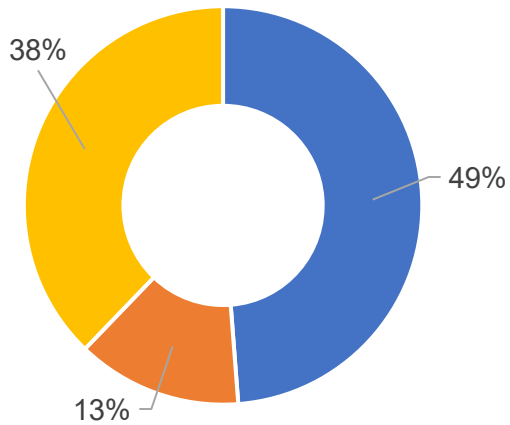


17% of respondents offer Lyft, Uber or Taxi accounts or discounts, while 15% have employer-provided vehicles available for employees to use. 12% offer Zipcar.

Only 2% of employers provide bikeshare, scootershare, carpool app discounts or bicycles.

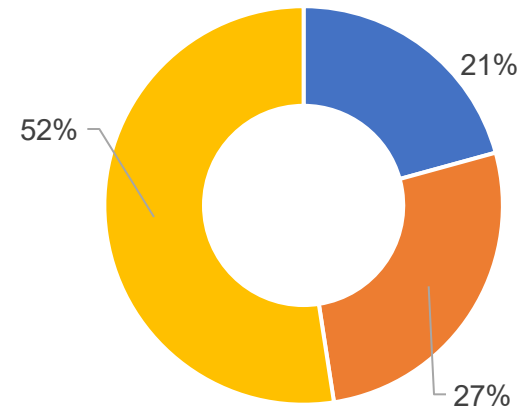
ORCA Business Programs

Which ORCA transit pass programs does your workplace offer?



■ ORCA Business Passport ■ ORCA Business Choice ■ Neither

What portion of employees' ORCA costs does your worksite pay?

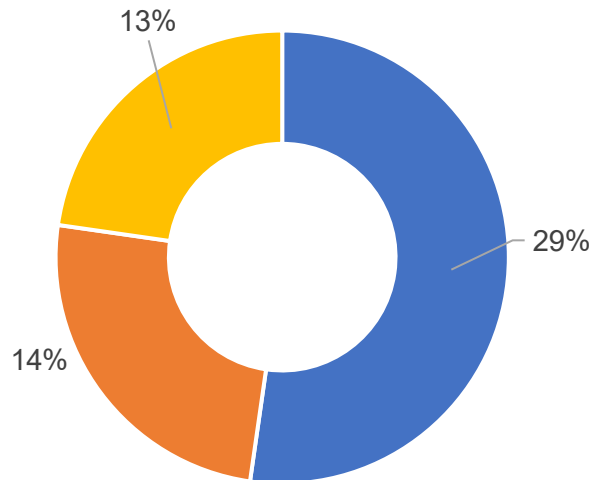


■ None ■ Some ■ All

Are you familiar with the WSDOT Small Business Incentive? **55% said no!**
Would financial subsidies make your business more likely to offer ORCA? **62% said yes!**

Subsidies & Support

What commute costs does your worksite allow employees to set aside a portion of their pre-tax income for?

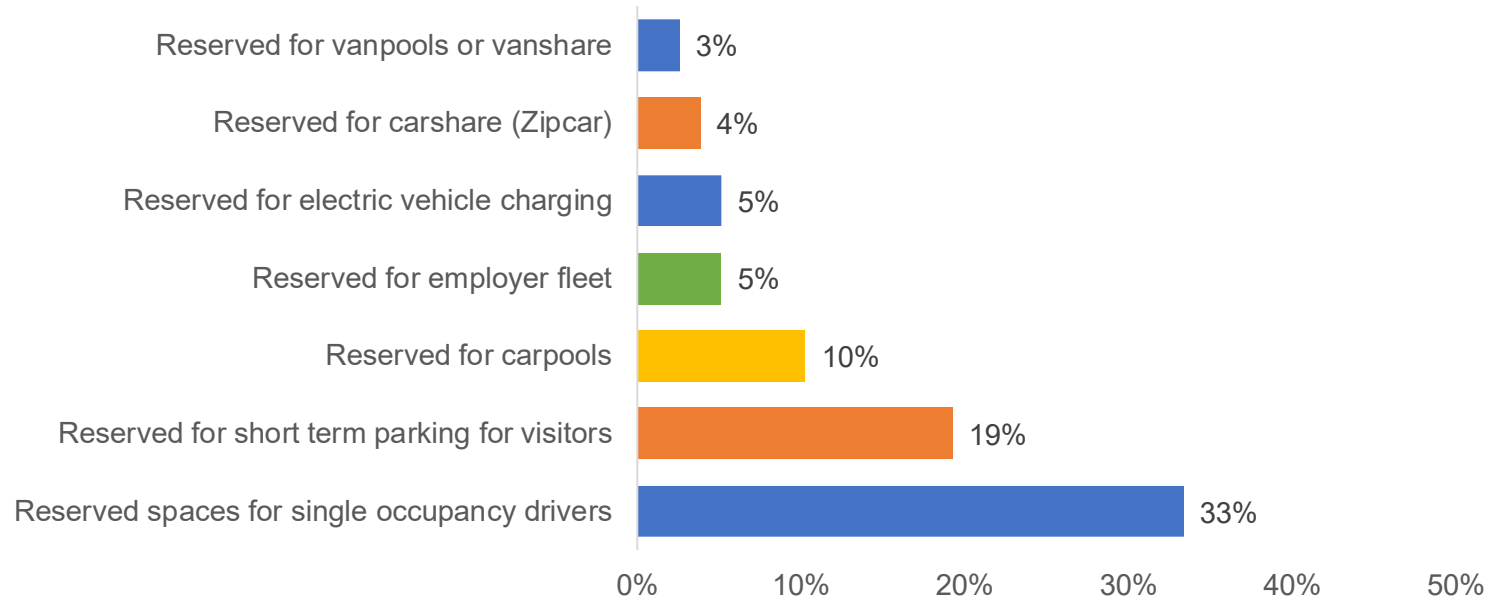


- ORCA, ferry, or other transit passes
- Vanpool/Vanshare services
- Parking

- **23%** offer a general transportation subsidy (e.g., cash)
- **5%** offer an active transportation subsidy for walking or biking
- **5% or less** offer vanpool or carpool support such as ride-matching, subsidies, or reserved parking
- **10%** offer free parking to carpools and vanpools
- **57%** have not heard of the Commuter Benefit Ordinance!

Parking & Driving

What types of reserved parking does your worksite (or your property manager) provide?



42% have reserved parking available for employees or customers.

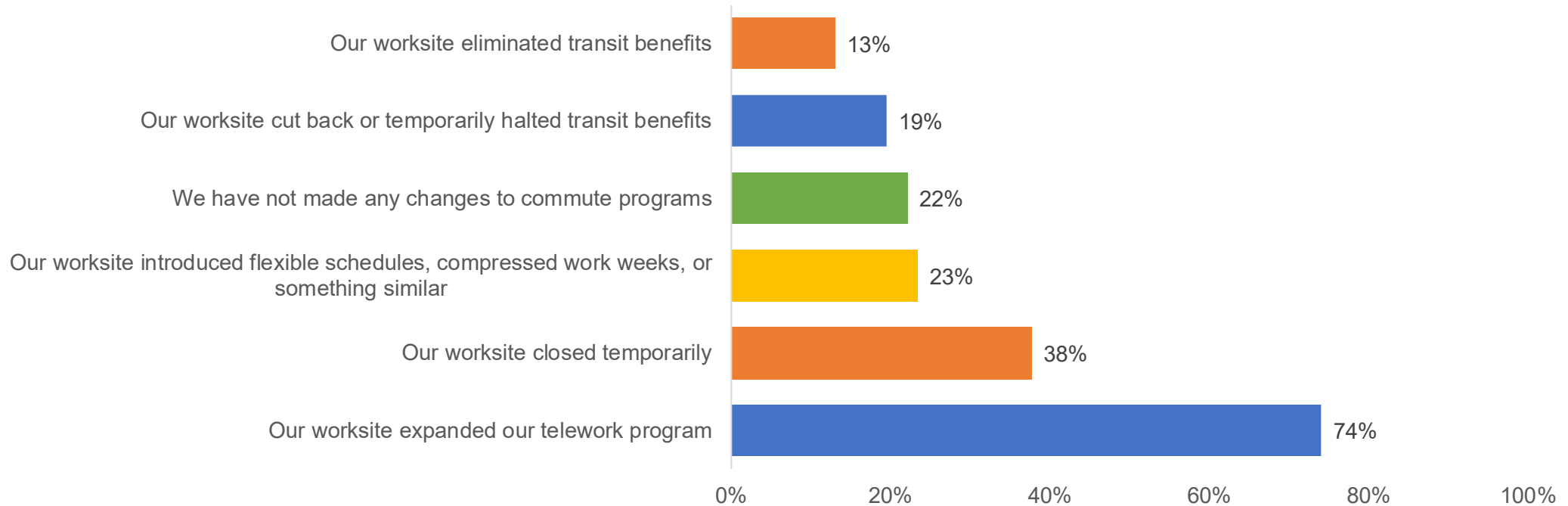
21% provide free parking to employees who drive alone.

15% offer a parking subsidy or reimbursement to employees who drive alone.

Short-Term Impacts

Of COVID-19

Impacts of COVID-19 on transportation benefits **over the last six months:**

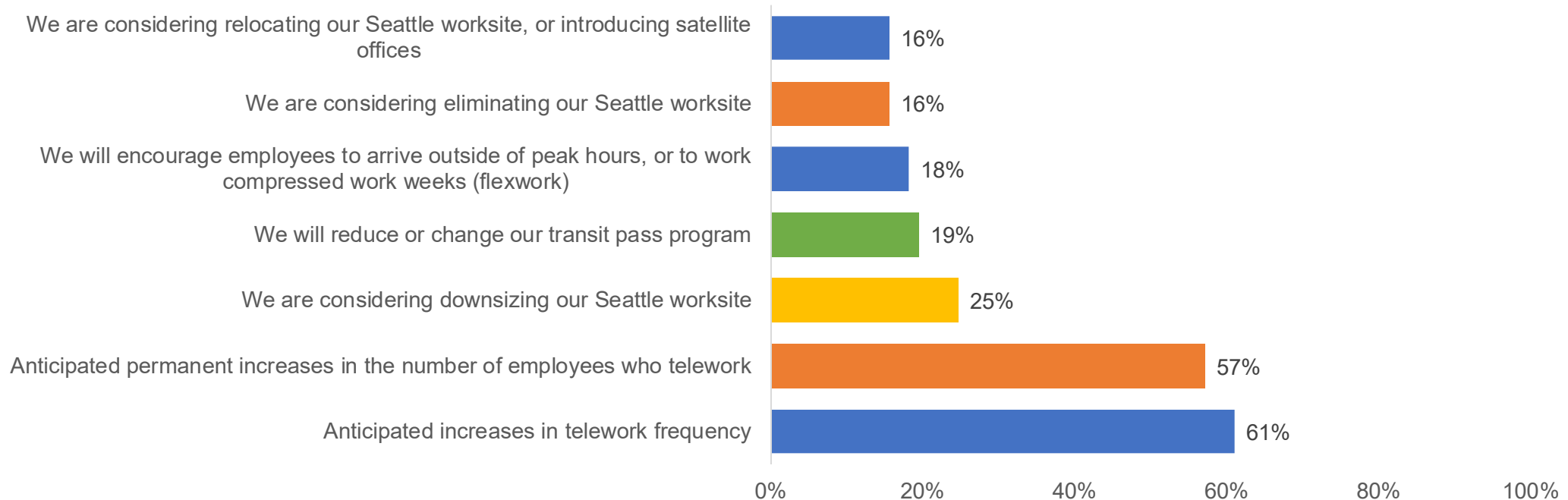


Less than 10% reported permanently closing their office, eliminating or cutting back multiple commute benefits, or adding new benefits.

Anticipated Long-Term Impacts

Of COVID-19

Anticipated long-term impacts of COVID-19 on transportation benefits:

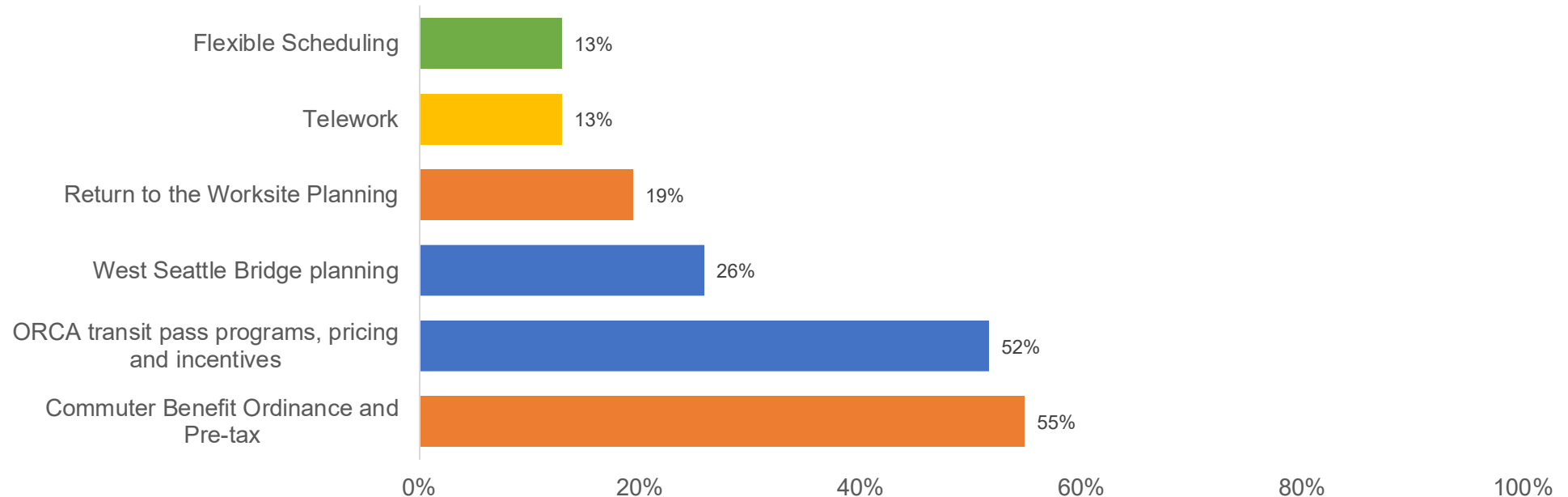


Less than 10% reported intent to expand parking benefits for SOV drivers, eliminate transit pass programs, decrease commute benefits, lease additional parking or expand parking benefits.

Requests for Help

Topics for customer follow up

Customers interested in follow up asked about the following topics:



37% of respondents asked for additional help from a Commute Seattle specialist.