

What do we know about Seattle Commuter Benefits?

Based on the 2021 Seattle Center City Mode Split Study &
2022 Seattle Commute Trip Reduction Employer Program Reports

June 2022

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Agenda

1. What are Commuter Benefits?
2. 2021 Seattle Center City Mode Split Topline Results
3. 2022 Seattle Commute Trip Reduction (CTR) Employer Program Reports



What are Commuter Benefits? Let's come to a common definition.



Commute Seattle sold 20,000 transit passes since 2018.



Commute Seattle offered over 1,600 consultations to businesses since 2018.

Retain the Region's Top Talent

Nearly 2/3 of workers have considered quitting if asked to return to the office full-time.¹



¹DiNizio, J. (2022, April 25). *ADP Research Institute® reveals pandemic-sparked shift in workers' priorities and expectations in New Global Study*. ADP Media Center. Retrieved May 16, 2022, from <https://mediacenter.adp.com/2022-04-25-ADP-Research-Institute-R-Reveals-Pandemic-Sparked-Shift-in-Workers-Priorities-and-Expectations-in-New-Global-Study>



Commuter Benefits Make it Easier for Workers

- 2/3 of major downtown Seattle employers plan to require employees to be at the office 3 or more days per week.²
- Over 2/3 of major Seattle employers offer employees an ORCA pass to ride transit
- 1/3 of major Seattle employers support their staff with an active transportation subsidy



Overview

What is Center City Mode Split?

The purpose of this research is to track the travel behavior and attitudes of commuters to Seattle's Center City over time, including shifts in travel mode usage and non-commute trips.

A total of 4,371 interviews were conducted from 263 participating worksites as part of the 2021 study.

Commuter data collection took place between October 18th and November 28th, 2021.



Summary of Findings

Digesting Mode Split Data

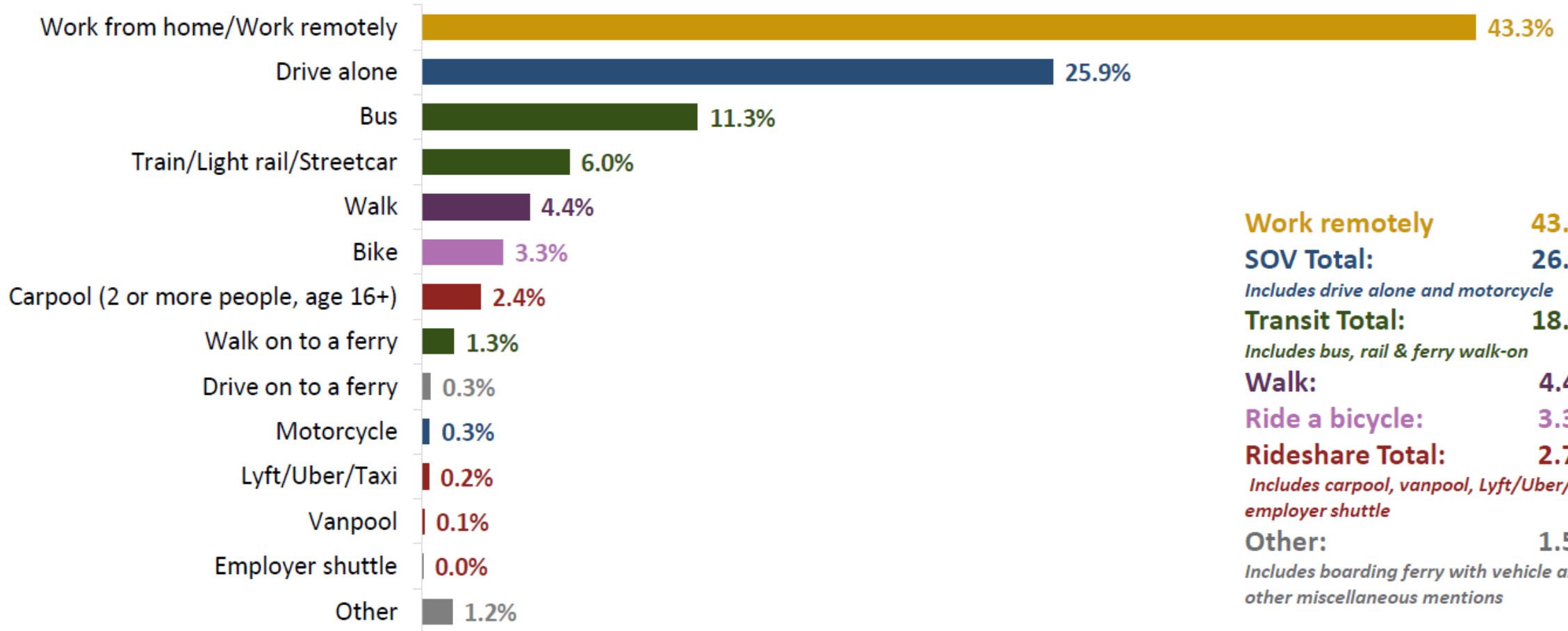
Who gets to enjoy the benefits of telework, and how does that impact those who don't?

Key Takeaways:

- The COVID 19 pandemic has led to significant mode shifts among Downtown Seattle commuters, most importantly with a sizeable increase in remote work.
- CTR affected employees have continued to make far fewer physical commute trips than before the pandemic as they generally have more remote work options available to them. About three quarters expect to return to their commutes after the pandemic, and only a quarter expect to commute daily in the long run.
- The availability of and the unmet demand for commuter benefits differ between employees at CTR affected and non affected worksites, most notably around the availability of remote work options and employer paid parking and transit.

2021 Mode Split

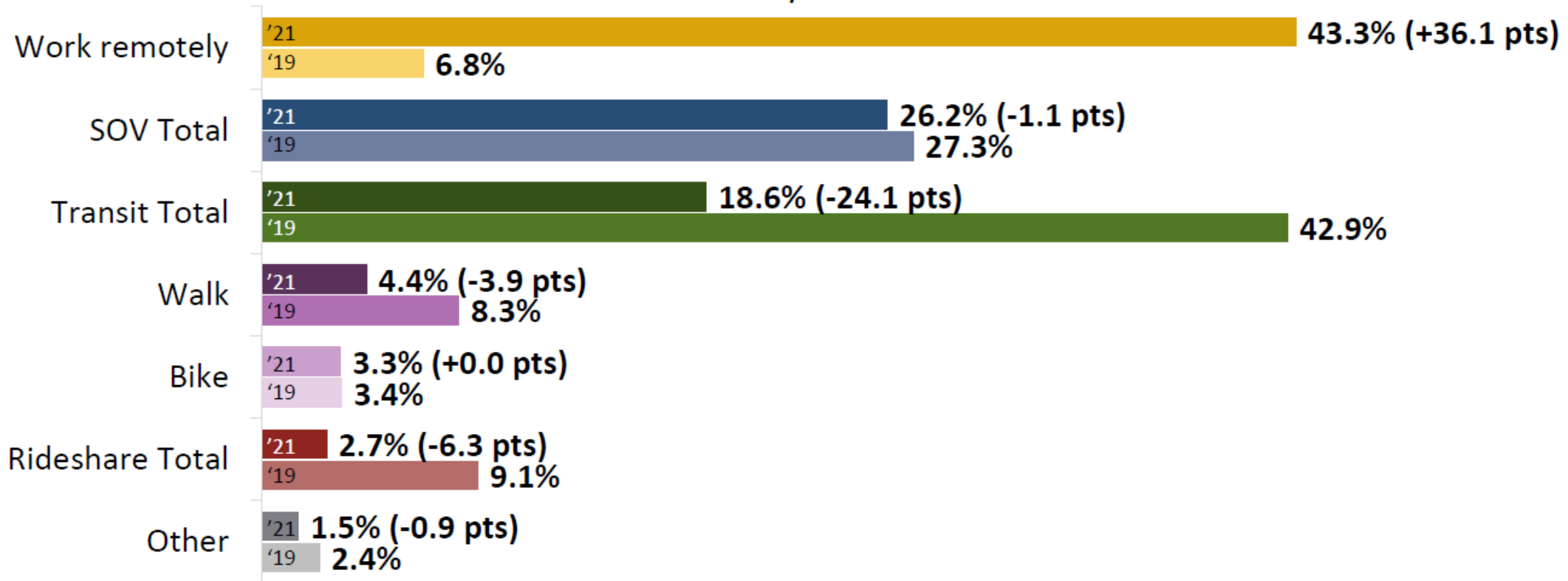
2021 Detailed Commute Mode Share – Overall Center City
All respondents



2019-2021 Mode Split

2019 – 2021 Commute Mode Share Change – Overall Center City
All Respondents

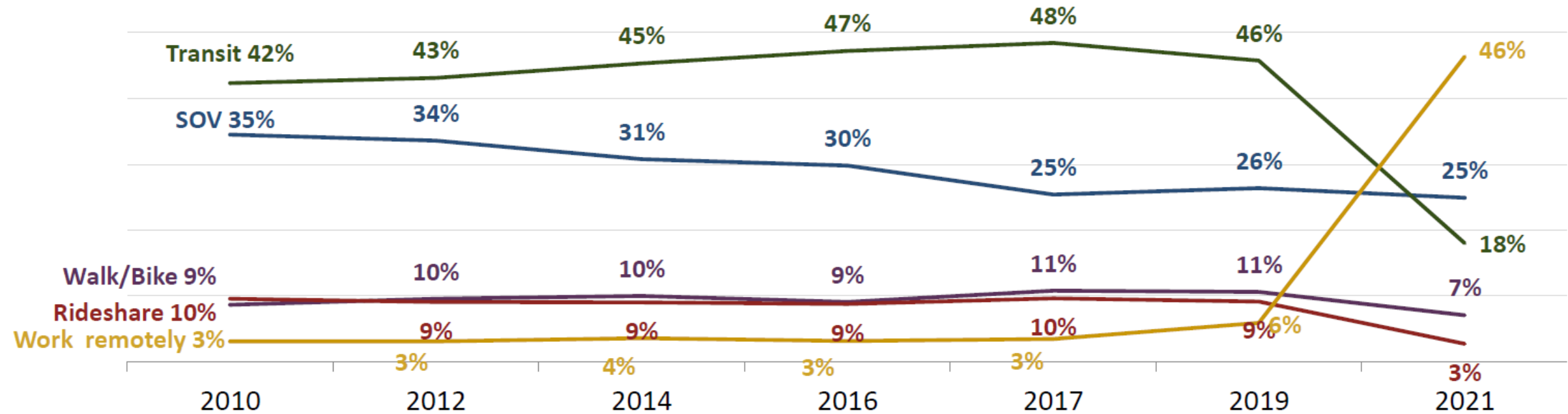
Weighted n=1,337
Weighted MoE=±2.7 pts



2010-2021 Peak Hour Mode Split

2010 – 2021 Weekday Peak Commute Mode Share Trend
Respondents who started work between 6 a.m. and 9 a.m. on weekdays

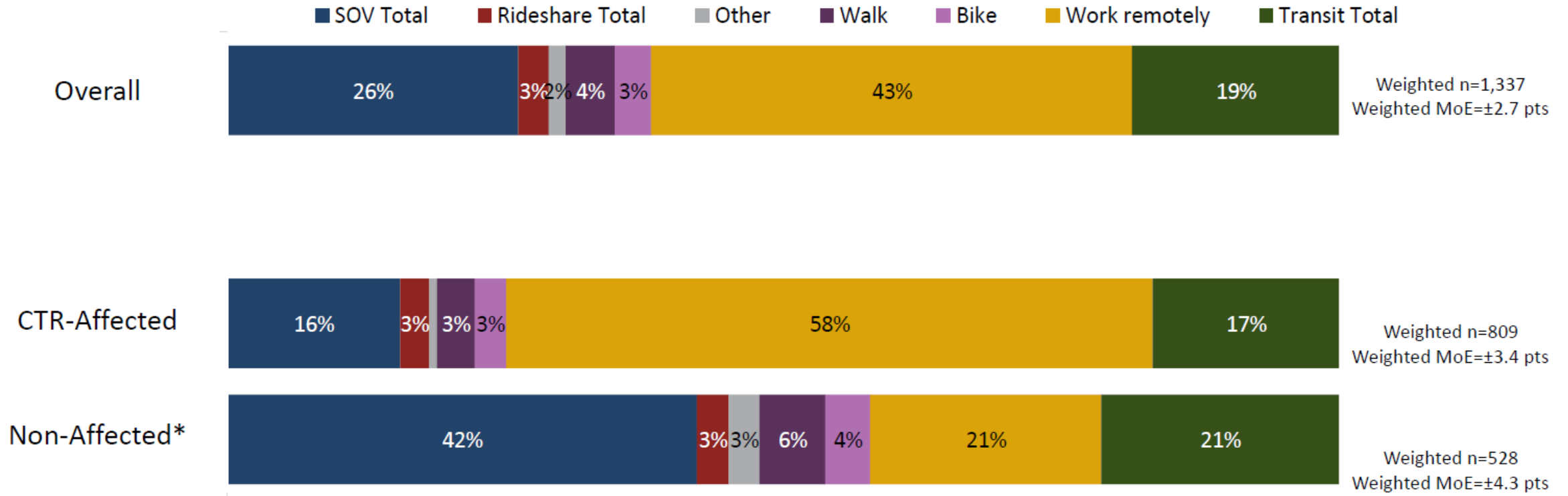
Weighted n=1,155
Weighted MoE=±2.9 pts



Access to Remote Work

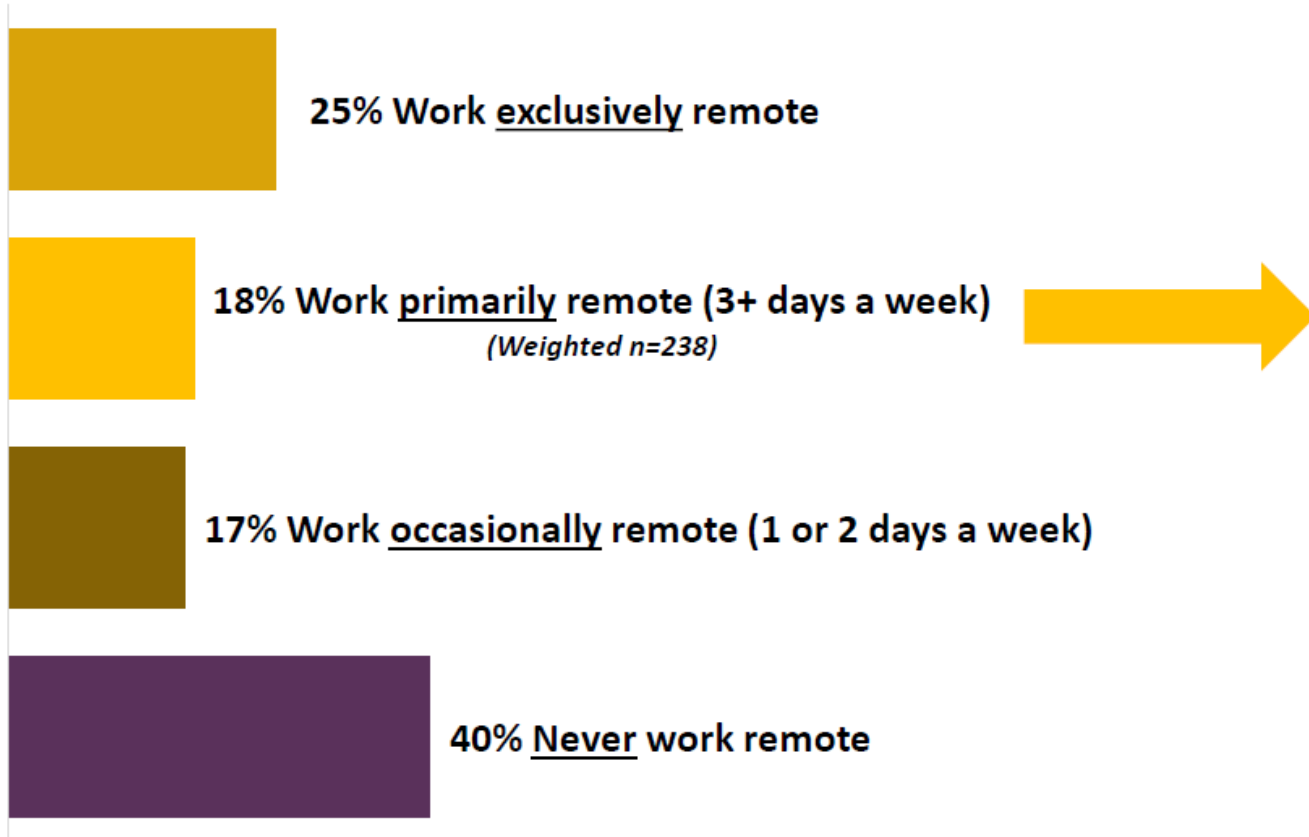
Mode Share by Survey Type

All respondents



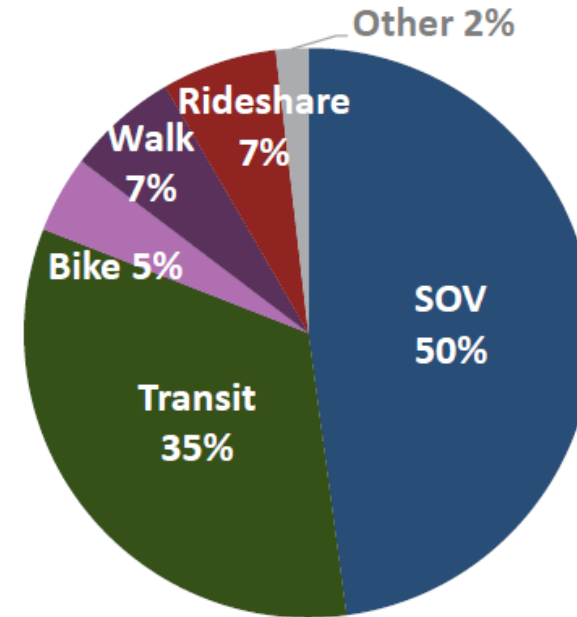
Remote Worker Trends

All respondents



Primary Remote Commuters

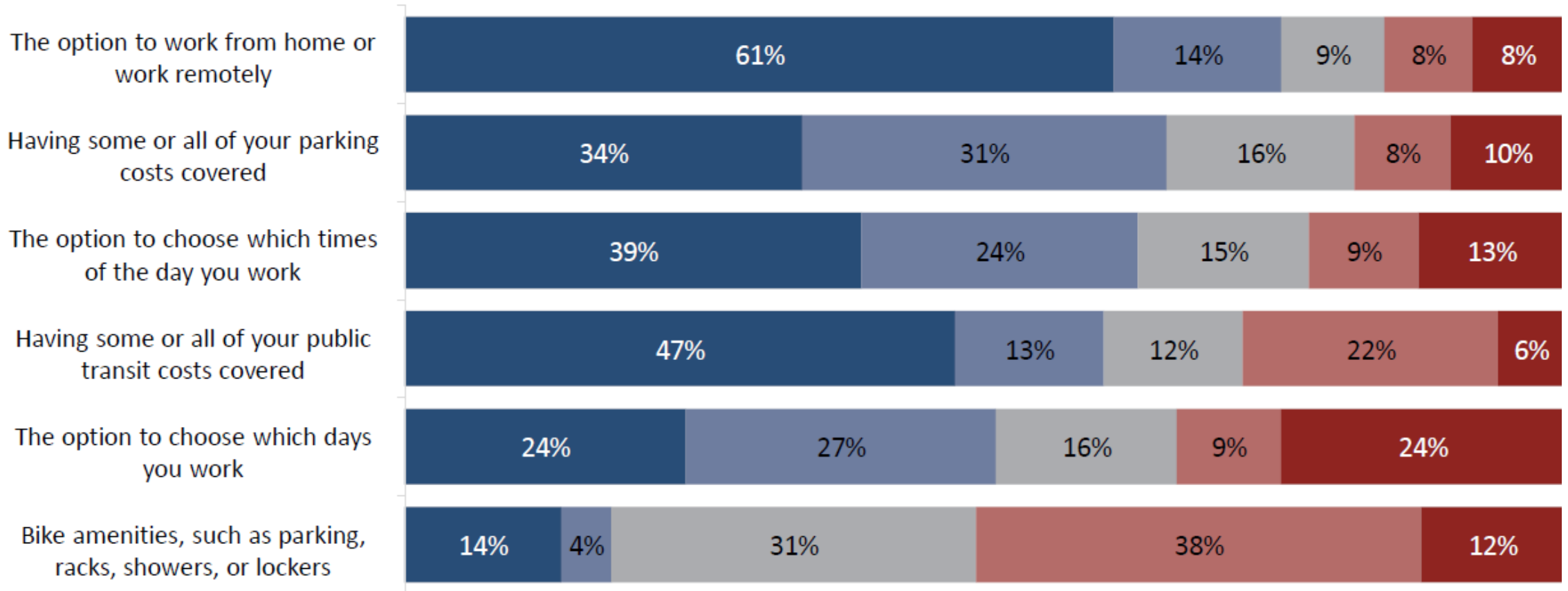
Other modes used by commuters who work remotely 3+ days per week



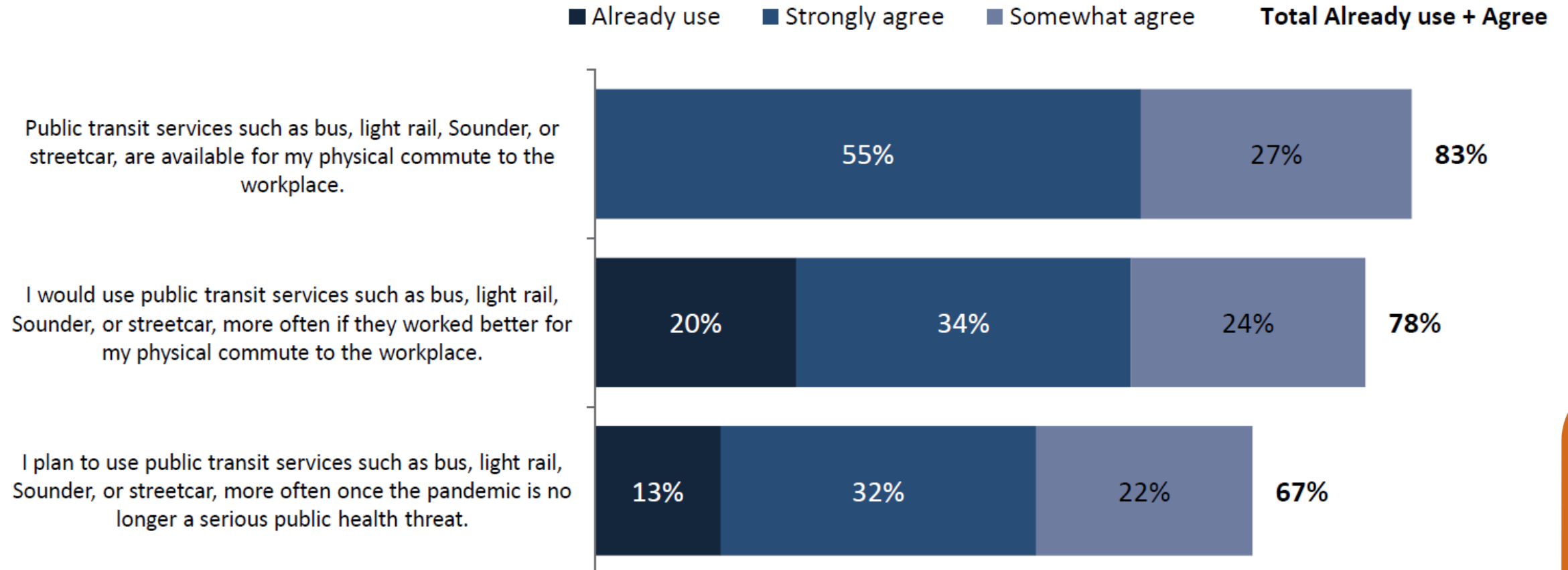
Benefit Availability and Use

All respondents

■ Available and use ■ Not available but would use it ■ Don't know/Not applicable ■ Available but don't use it ■ Not available and would not use it



Benefit Availability and Use



Overview

What are Employer Program Reports?

Employers are required to submit a regular Commute Trip Reduction (CTR) program report biennially to the City of Seattle that describes the actions it has taken during the preceding year and the actions it will take in the coming year. Program Reports include information like facilities, benefits, and communication.

A total of 234 worksites completed their CTR Program Report requirement between January and February 2022.



Top 5 Key Takeaways

Digesting Employer Program Report Data

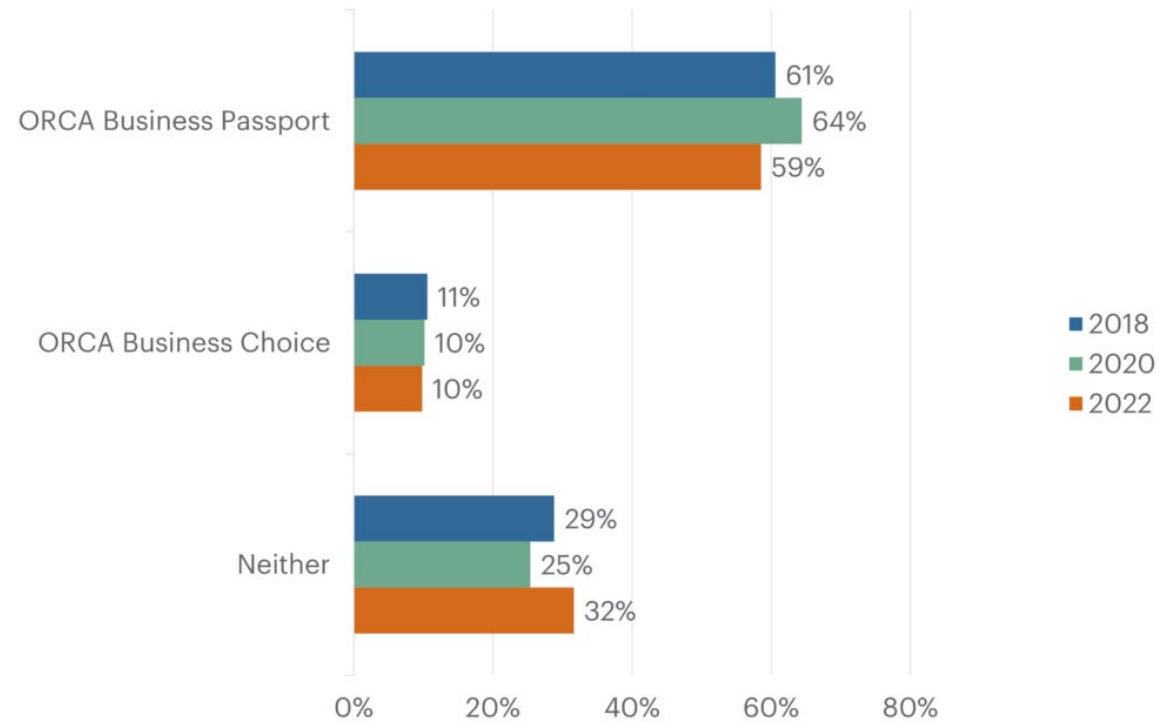
**\$48 million
invested by
CTR worksites
in employee
commuter
benefits**

Key Takeaways:

1. Businesses are still investing in transit
2. More employers support healthy, active commutes
3. Workplaces are encouraging shared rides using Vanpool
4. Some employers have opted to alter parking to meet the needs of their staff
5. 95% of all workplaces now offer remote work; an 8% increase from 2020.

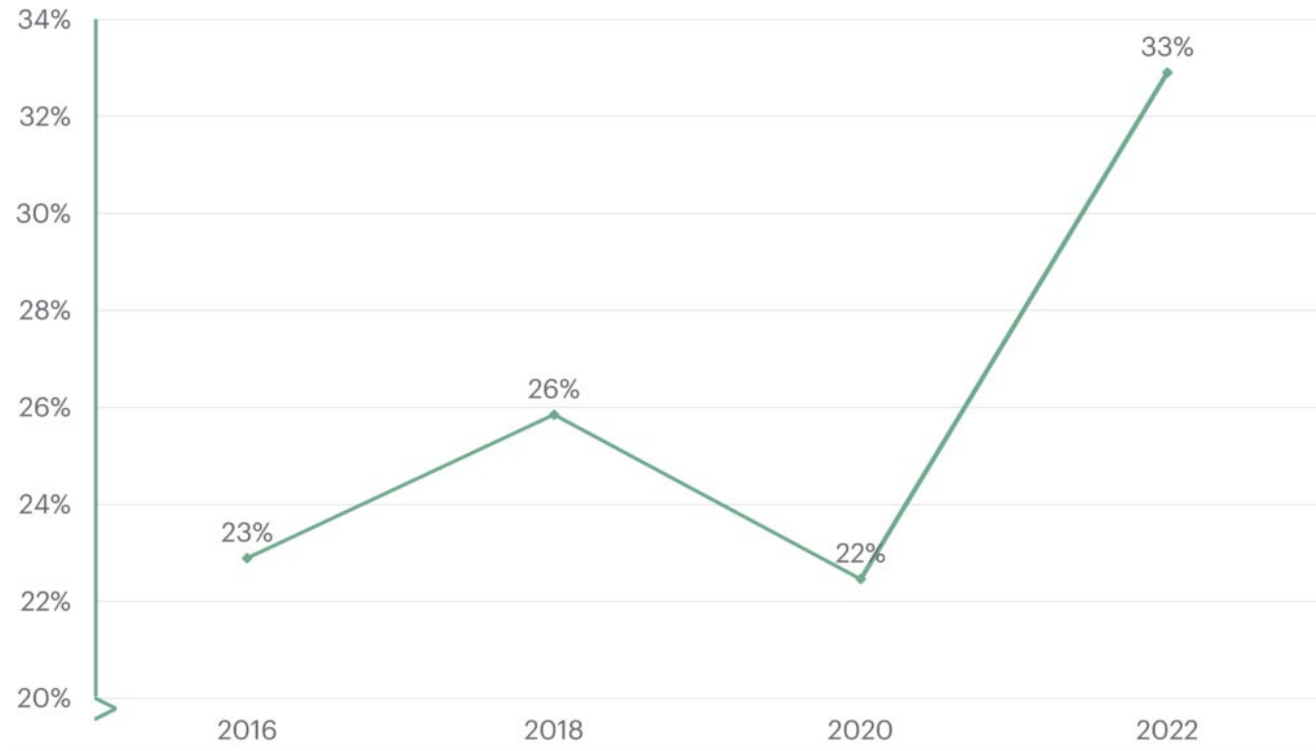
1) Businesses are still investing in transit

Which King County Metro Business ORCA Programs does your workplace offer your employees?



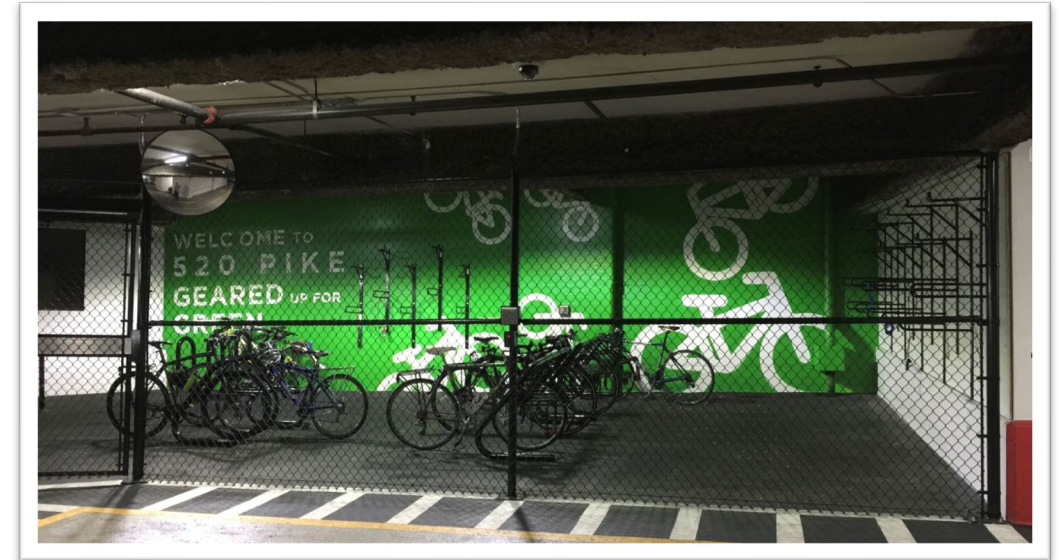
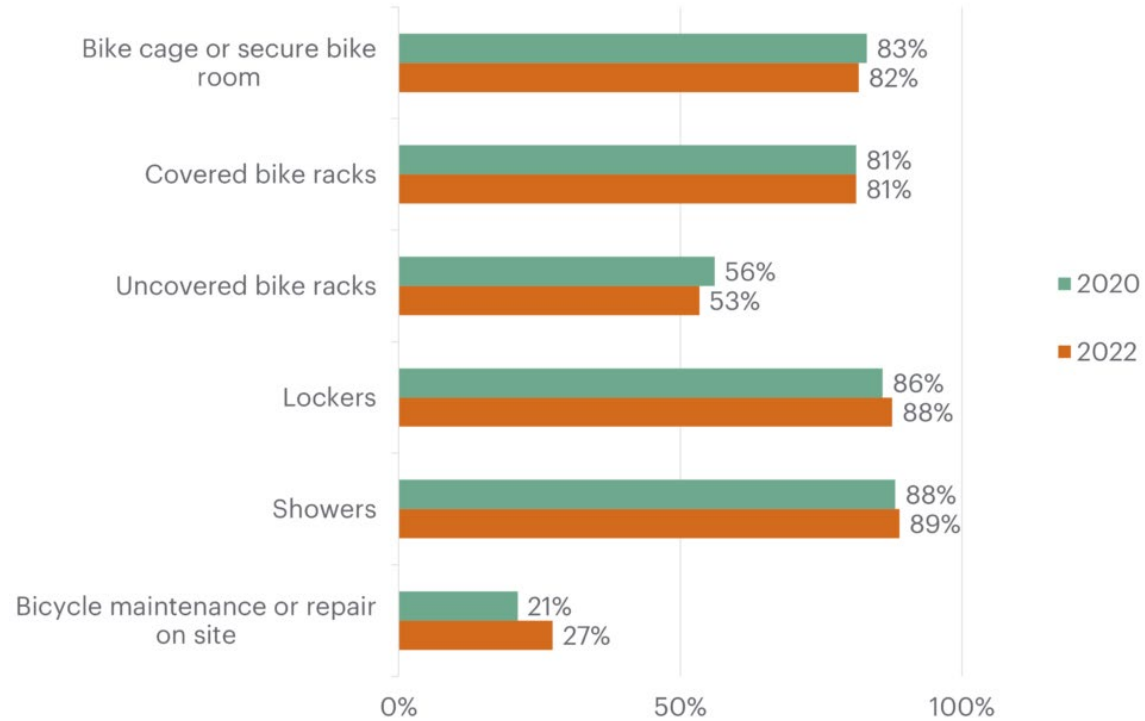
2) More employers support healthy, active commutes

Percentage of worksites that offer active transportation subsidies over time

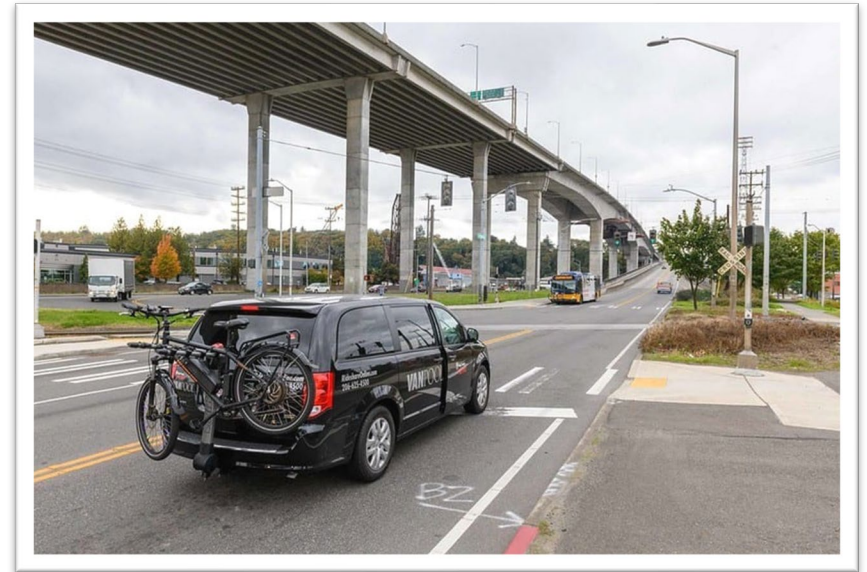
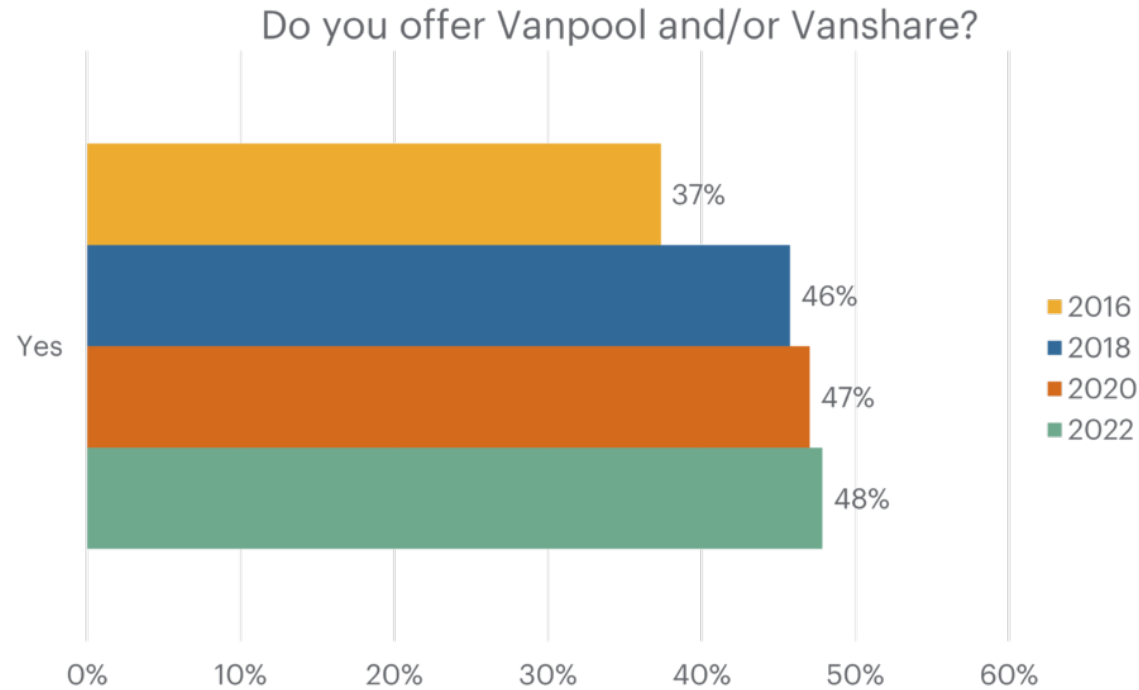


2) More employers support healthy, active commutes

Do you offer the following active transportation amenities at your worksite? (check all that apply)

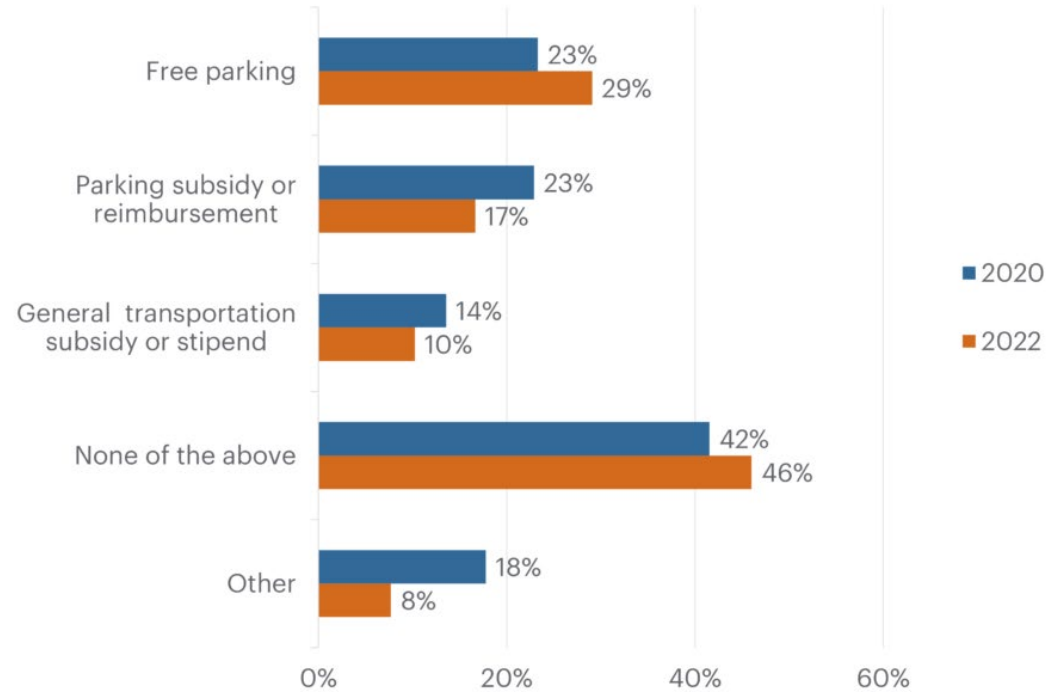


3) Workplaces are encouraging shared rides using Vanpool



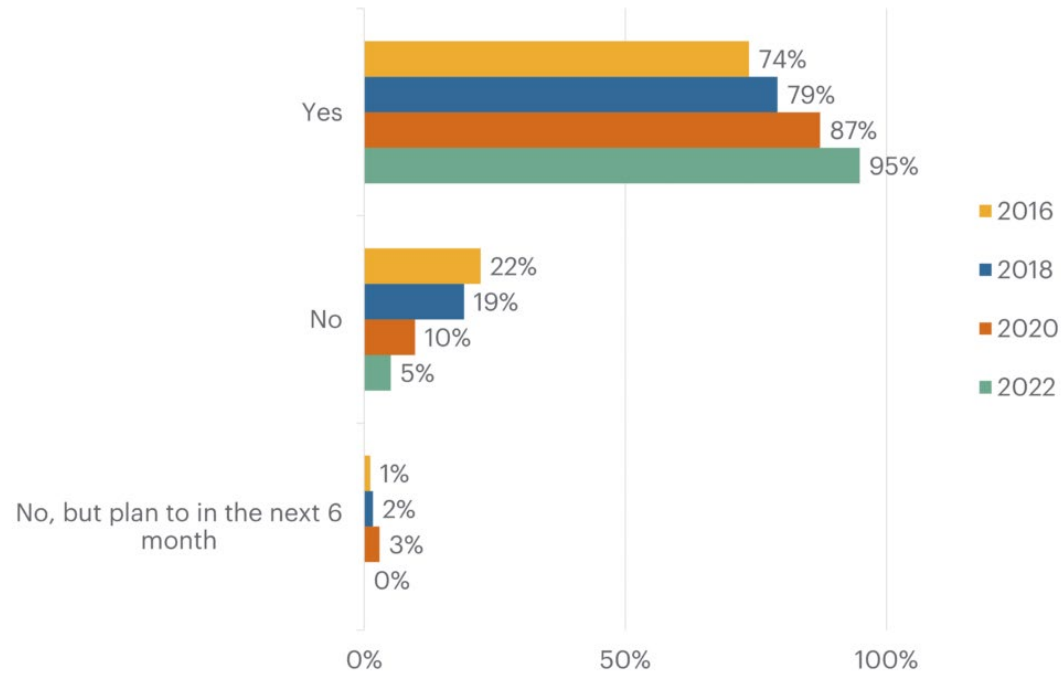
4) Some employers have opted to alter parking to meet the needs of their staff

Which of the following benefits do you offer to employees who drive alone? (check all that apply)



5) 95% of workplaces now offer remote work

Do you offer telework or remote work options to avoid or shift time of a commute trip?



Questions?

Contact Commute Seattle!

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