

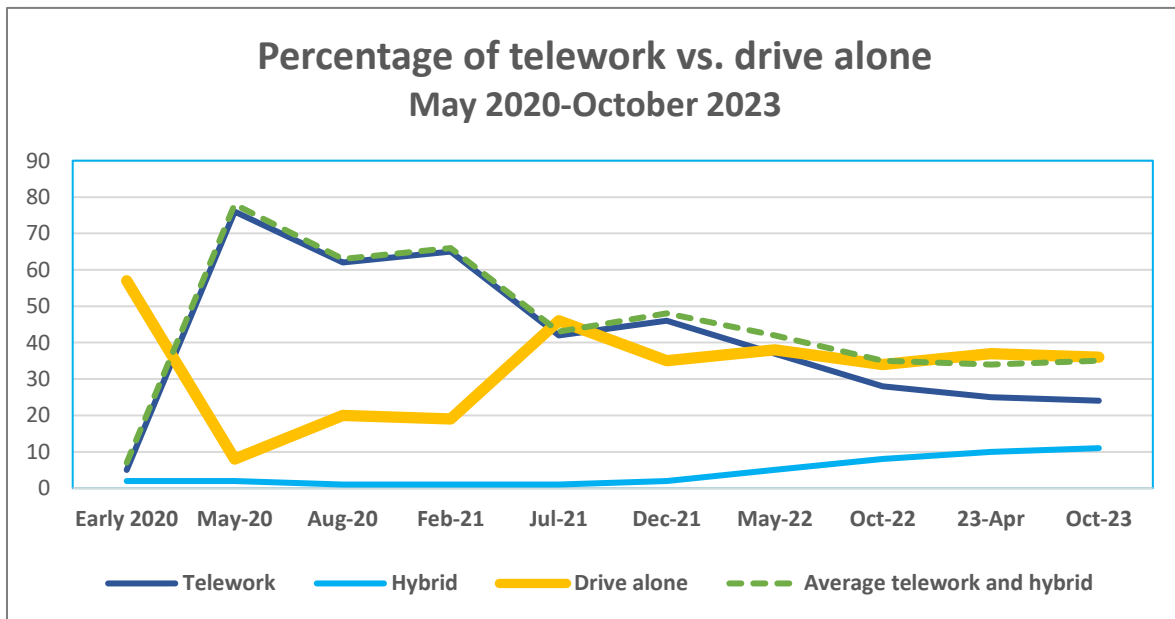


The new, “New Normal” commute of 2023

A compilation of results from 2023 Employer/Telework Surveys and 2023 Commuter/Telework Surveys

Introduction

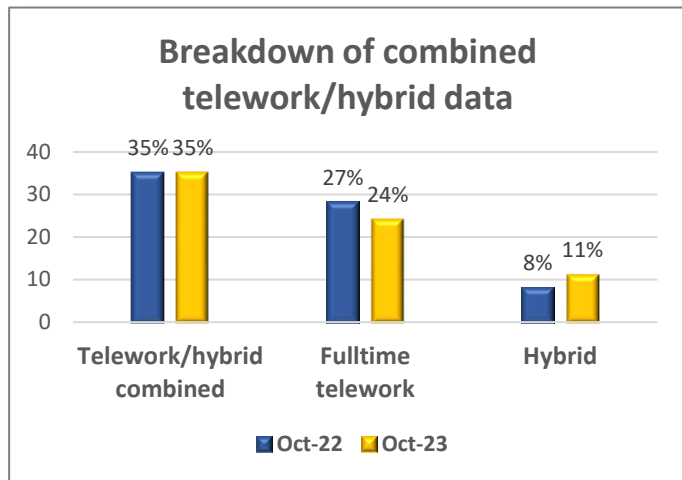
Surveys conducted in 2023 represent the first full year of commute patterns emerging since most area employers brought their staff back to the worksite. Previous employer survey data indicates that 80 percent of employers called telework staff back to the worksite one or more days per week by July 2022.



After a full year, the number of people who are working from home three or more days per week remains fairly consistent, accounting for about one-third of commuter survey respondents. At the same time, those who drive alone to the worksite three or more days per week likewise account for one-third of the commuter survey respondents.

In October 2022, commuters who teleworked fulltime or worked a hybrid schedule from home three or more days per week topped those who drove alone three or more days per week by just 1 percentage point. In October 2023, the reverse is true – **36 percent of commuter survey respondents say they drive alone three or more days per week, while 35 percent telework or work a hybrid schedule three or more days per week.**

While the telework/hybrid work versus drive alone data seems to remain consistent for the past year, a new data point has emerged: **the number of people who telework fulltime is declining, while the number of people who are working hybrid arrangements is on the rise.** With regional news coverage of more employers finetuning telework/hybrid arrangements, this new trend is something we will continue to watch in the coming year.



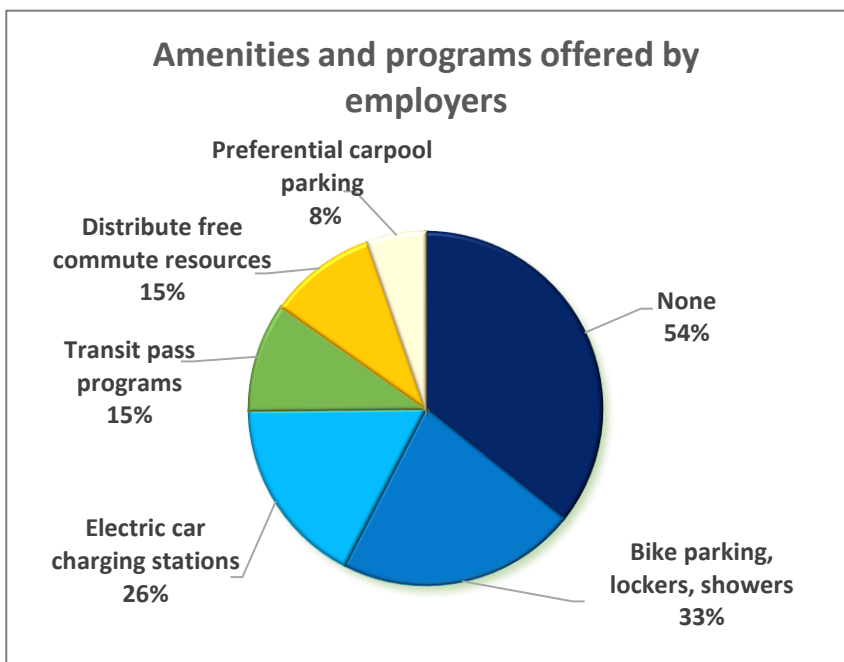
Employer data

Employer surveys were conducted in March 2023 and August 2023. The variations between fulltime telework and hybrid work cited in the previous graph are substantiated by responses from the two 2023 employer surveys. **In March, 59 percent of employers indicated their staff are at the worksite three to five days per week; by August, 72 percent of employers said the same.**

Organizations appear to be scaling back the flexibility component for hybrid schedules, as well. In March, 41 percent of employers said their hybrid work model varied weekly. Just 15 percent of respondents said their hybrid staff did not have a set schedule of at-home and in-office days by August.

Over the past year, many employers have adjusted their commute programs and amenities offered to try to meet the needs of staff. Some employers have not resumed programs they carried four years ago, and still others simply do not offer amenities for commuters.

In August, 46 percent of employers said they offer commute-based amenities. Of those, 33 percent have bicycle parking or storage, lockers and showers for bike commuters; 26 percent offer electric vehicle



charging stations. 15 percent have transit pass programs, 15 percent distribute free commute resources from Commuter Services, and 8 percent have a preferential carpool parking program.

Resources requested by employers

Commuter Services routinely asks employers what types of resources would help them execute their organization’s telework/hybrid work programs, and what resources they would find helpful for their company’s sustainable commute programs. Top responses are as follows.

Telework / Hybrid work resources

- Guidance on how to create connection on hybrid teams
- Guidance on developing telework and hybrid policies
- Employee training on best practices for the remote working environment
- Manager training on how to effectively supervise remote and hybrid workers

Sustainable commute resources

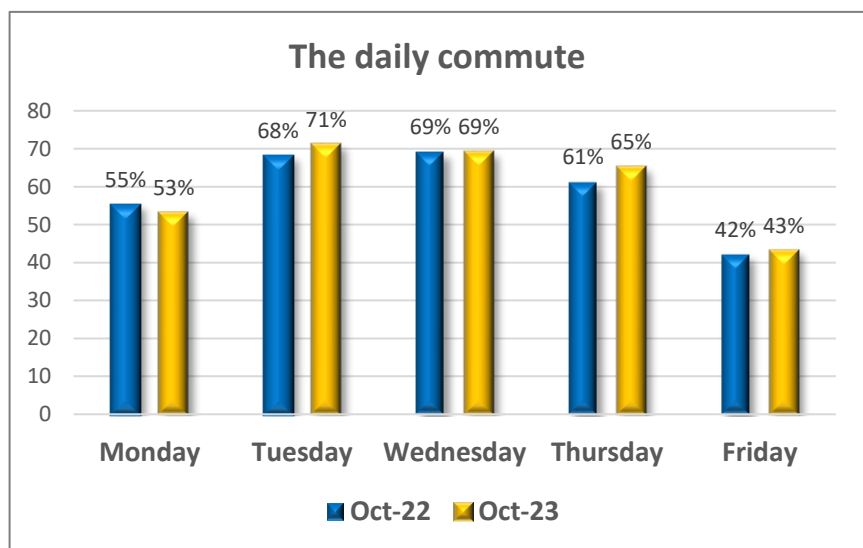
- Road construction updates – top request in both March and August surveys
- Environmental impacts of driving alone and benefits of sustainable commuting
 - This topic has received increased interest over the past year

Commuter data

Commuters were likewise surveyed twice this year. The April 2023 Commuter/Telework Survey and the October 2023 Commuter/Telework Survey affirm that telework and hybrid work still influence the drive alone commute.

As with other data points, the days of the week most commuters travel to the worksite remains consistent between October 2022 and October 2023; though there is a slight increase of travel on Tuesdays, Thursdays, and Fridays.

The October 2023 Commuter/Telework Survey pinpoints data specifically related to drive alone commuters:

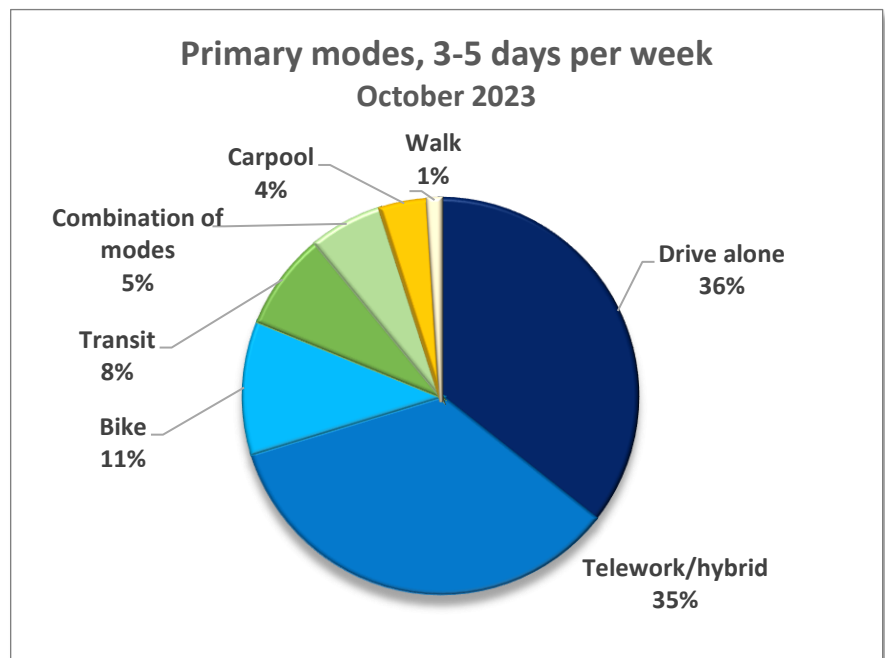


- 69 percent live 15 miles or less from their brick-and-mortar worksite. Of that group, **21 percent of drive alone commuters say they live within five miles of where they work.**
- 42 percent are going to the workplace five days per week; another 26 percent are traveling to the worksite three days per week.
- If they were to try a sustainable commute, 37 percent of drive alone commuters say they would try bike commuting, 29 percent would take the bus, 20 percent would try carpooling.

30 percent of drive alone commuters say they do so because their work requires them to drive in some capacity. 27 percent drive alone because transit schedules are inconvenient or there are no routes near their home or work.

“I have looked into bus/light rail transit, but it requires two transfers and triples my commute time,” one drive alone commuter wrote. Another simply left the comment, “Car = 7 minutes, bus = 1 hour 31 minutes.”

In addition to driving alone or working from home three or more days per week, 11 percent of respondents say they bike to work; 8 percent take transit; 5 percent take a combination of modes; 4 percent indicated they carpool; and 1 percent walk to work.



What commuters want

The October survey asked a series of questions to learn what Commuter Services and communities could do to make it easier for commuters to incorporate sustainable trips to work, and into their daily routines.

From Commuter Services

- 44 percent of respondents would like to see more employer-sponsored amenities like transit passes, preferred carpool parking, etc.
- 28 percent turn to Commuter Services for bike commuting resources
- 20 percent would like to have bikes racks at the workplace
- 15 percent of respondents would like help finding carpool partners; another 15 percent would use help with transit route planning
- 6 percent said they would be interested to learn how to start a vanpool

From communities

- 61 percent of survey respondents said they would like to see more marked, safe bicycle lanes in their communities
- 49 percent said they would appreciate more walking trails and sidewalks
- 46 percent said it would be helpful for cities to clear snow and debris at bus stops and shelters
- 24 percent said more bike repair stations for public use would be appreciated
- 22 percent indicated they would like to see more electric vehicle charging stations; another 22 percent said more park and ride lots
- 17 percent said they would use micromobility options like e-bikes or e-scooter sharing

Several respondents also wrote comments calling for cities to clear snow from bike lanes in a timely fashion after snowstorms. Two respondents added that there should be education and enforcement to stop snowmobiles from using bike lanes in the winter.

Telework resources

In both 2023 surveys, the resources most requested by teleworkers are actually commute resources.

An average of 18 percent of respondents from April and October would like information on everything from carpool matching to transit pass programs.

Teleworkers and hybrid workers who took the October survey also asked for resources on work from home best practices (7 percent), networking opportunities for teleworkers (6 percent), ergonomics (5 percent), resources to help employers understand the value of allowing staff to work from home (4 percent) and mental health tips (3 percent).

Climate and sustainable commuting

In the April 2023 Commuter/Telework Survey, Commuter Services asked a handful of climate-based questions to understand the mindset of commuters when it comes to their own carbon footprint.

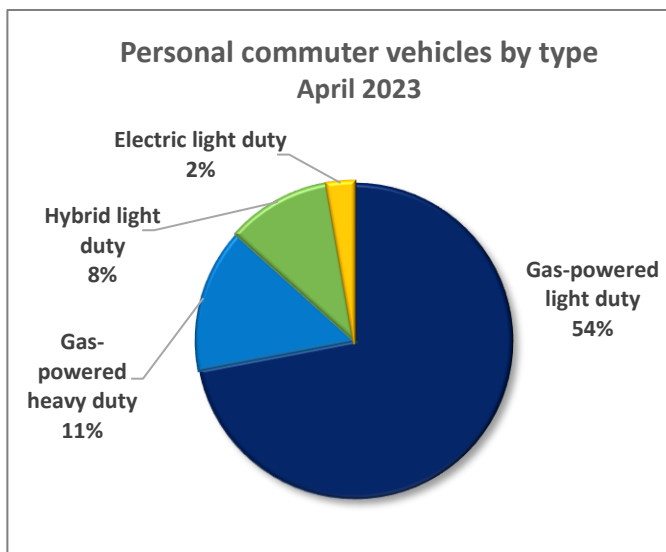
When asked to rate concern about climate change and/or global warming on a scale of 1-10, 35 percent of question respondents gave a score of 10. Overall, the average score was 8. **But, when asked to rate concern over their own personal contribution to greenhouse gas emissions on a scale of 1-10, only 11 percent of respondents gave a score of 10. The overall average score to this question was 6.**

In April, responses indicated that EVs have yet to make an impact on the types of vehicles currently driven by commuters.

The survey defined “light duty vehicles” as coupe, sedan, and mini-SUV automobiles. “Heavy duty vehicles” were defined as SUVs, pickup trucks, and other large, personal vehicles.

When asked what type of personal commuter vehicle they used most often, 54 percent of respondents said they use a gas-powered light duty vehicle. Another 11 percent said they drove a gas-powered heavy duty vehicle.

8 percent reported they drive a hybrid light duty vehicle; less than 1 percent said they drive a hybrid heavy duty vehicle.



Only 2 percent of respondents said they use an electric light duty vehicle; less than 1 percent reported driving an electric heavy duty vehicle. And, just over 1 percent said they drive another eco-friendly vehicle, such as a natural gas vehicle, flexible fuel vehicle or gasoline hybrid.

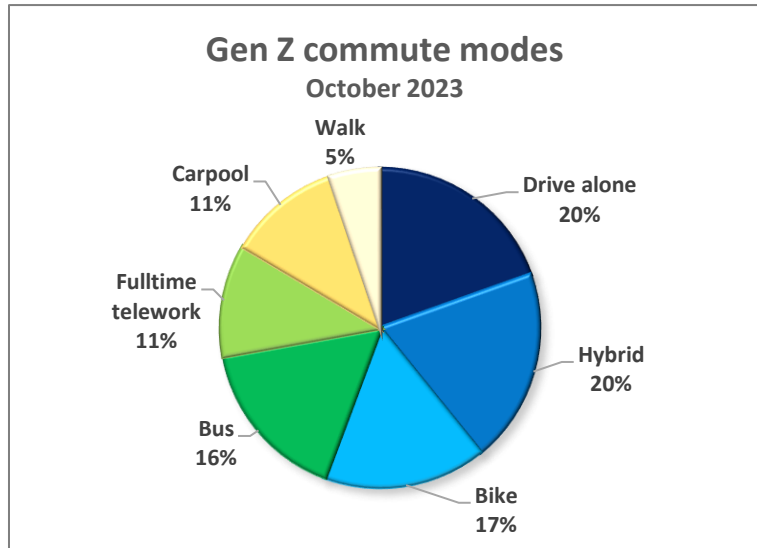
Commuter Services will track this data on an annual basis going forward.

Focusing on the future

At 26 or younger, Generation Z workers provide a snapshot of what commute trends may look like in the future. While they currently make up only a small percentage of survey respondents – 5 percent in the April 2023 survey, 6 percent in the October survey – Gen Z tends to be less reliant on drive alone commutes.

Of all the generations/age ranges, Gen Z has the lowest percentage of respondents who drive alone, and the highest percentage to take other modes like bike commuting, transit and carpooling.

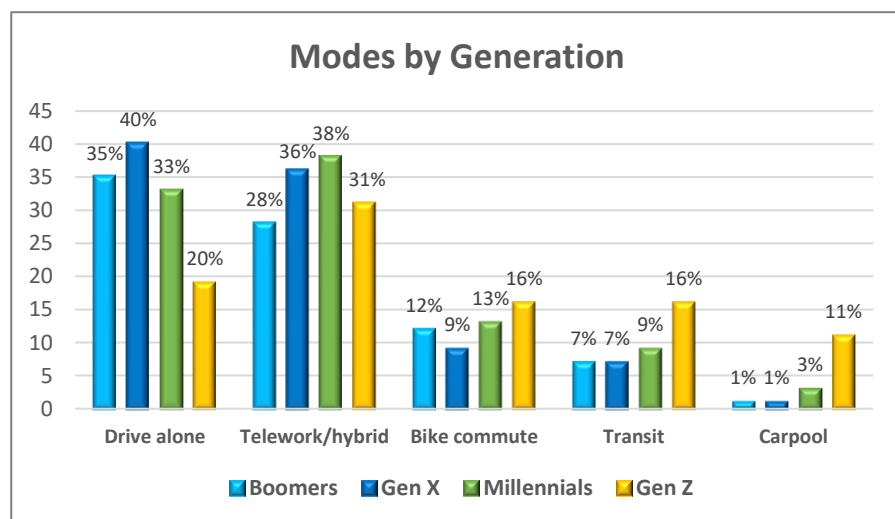
In October, only 20 percent of Gen Z respondents said they currently drive alone to work three or more days per week. By comparison, 40 percent of Gen Xers say they drive alone. And, Gen Z is twice as likely to take transit as either Baby Boomers or Gen Xers.



Generation Z respondents also tend to live close to their worksite. An average of 42 percent of Gen Z commuters live within five miles or less from their workplace; 26 percent live within 10 miles of work.

Gen Z is the demographic most open to using or trying transit. In October, 52 percent of Gen Z

respondents who currently drive alone said they would like to try bus transit, compared to 34 percent of Millennials and 23 percent of Gen Xers.



Demographics

Commuter Services asks a series of demographic questions in each survey to better understand our commuters. From the October 2023 Commuter/Telework Survey:

- Millennials (age 27-42) account for 38 percent of commuters, followed by Gen X (age 43-58) at 37 percent, Baby Boomers (age 59-68) at 17 percent and Gen Z at 6 percent.

- 52 percent of respondents are women, 44 percent are men, 2 percent are nonbinary, and 1 percent are transgender.
- 85 percent of respondents are white, 6 percent are Asian/Pacific Islander, 3 percent are Hispanic or Latino, 2 percent are Black/African American, and 2 percent are multiracial.
- 30 percent of respondents work in an office setting, 15 percent work in healthcare, 14 percent work in government or public safety, 11 percent work in education, 7 percent work in manufacturing or industrial positions, and 7 percent are employed in retail or the restaurant/food service industry.
- 49 percent of commuters to respond have earned a bachelor's degree, 24 percent have a master's degree, 9 percent have some college credit but no degree, 7 percent have associate degrees.
- 64 percent are married, 26 percent are single and never married, 8 percent are divorced.