A BETTER CITY

REPORT | JULY 2022

ANTICIPATING POST-PANDEMIC COMMUTE TRENDS IN METRO-BOSTON

SPRING 2022 UPDATE

CITY of BOSTON

REPORT TEAM

City of Boston Transportation

A BETTER CITY

Written By:

- Marissa Rivera, Project Director of Transportation Management Association Innovation and Engagement

Data Analysis & Design Team:

- Scott Mullen, Transportation Demand Management Director
- Christine Yi, Transportation Management Association Marketing and Program Coordinator

TABLE OF CONTENTS

ACKNOWLEDGEMENTS

This collaborative effort of A Better City / City of Boston would not be possible without previous funding support from the Energy Foundation via the Bloomberg Philanthropies American Cities Climate Challenge.

A Better City is a diverse group of business leaders united around a common goal—to enhance Boston and the region's economic health, competitiveness, vibrancy, sustainability and quality of life. By amplifying the voice of the business community through collaboration and consensus across a broad range of stakeholders, A Better City develops solutions and influences policy in three critical areas central to the Boston region's economic competitiveness and growth: transportation and infrastructure, land use and development, and energy and environment.

EXECUTIVE SUMMARY

Over the course of the COVID-19 pandemic, Metro-Boston businesses have broadly embraced telework policies that will have profound effects on regional mobility. INRIX ranked the Boston region as having worst traffic congestion in the nation in 2019 and 2020, and then Massachusetts scored #1 in the 2022 Bicycle Friendly State Report Card by League of American Bicyclists. This roiling regional landscape presents a real opportunity to shape the future with deliberate policy decisions that foster the cleaner, more affordable and less gridlocked transportation future necessary to achieve our climate goals, while maintaining economic vibrancy.

In comparing nearly 1,400 Spring 2022 survey responses from Metro-Boston workers against 2,650+ Spring 2021 responses and 4,200+ Summer 2020 responses to the exact same survey, A Better City identified the following key takeaways and offers actionable recommendations for employers, the City of Boston, and the MBTA as workplaces continue to navigate impacts of the COVID-19 pandemic.

FIGURE I: CITY STREET IN DOWNTOWN BOSTON

TABLE I: KEY TAKEAWAYS & RECOMMENDATIONS

KEY TAKEAWAY	RECOMMENDATION
Compared to Spring 2021, the projected increase in drive-alone commuting from pre-pandemic habits has stayed the same at +5%. With more workplaces reopening over the past year and traffic outpacing public transit ridership, the metro-Boston region appears to be clearly trending toward an increased proportion of single occupancy vehicle (SOV) commuting compared to 2019 levels.	Employers play a critical role in influencing employees' commuting choices. To discourage SOV commutes going forward, it is crucial that employers recognize and optimize the relationship between parking, transit, cycling, walking, and telework employee benefits.
In our Spring 2021 update, we noted that survey respondents' levels of reported comfort with commuting by bicycle had markedly increased compared to Summer 2020. Spring 2022 response data now shows comfort levels declining compared to Spring 2021, although they are still above Summer 2020 levels.	The City of Boston's work to expand dedicated bicycle infrastructure in several key commuting corridors over 2020 – 2021 correlated with previously observed rising levels of bike commuting comfort. With perceived bike commuting comfort now declining, the City of Boston should refocus its efforts to create safe, comfortable cycling infrastructure as feasible connecting neighborhoods across the city to key employment centers.
The desire for hybrid work models, defined by part-time telework, remains strong across two years of surveying.	With traffic returning despite fewer in-office days across many industries, employers should work with the MBTA to expand, deploy, and promote new flexible fare products like the 10-ride commuter rail pass that meet the new market realities head on.
Subsidized transit passes remain the top measure identified by SOV commuters to incentivize a decrease in their drive-alone commuting. Concurrently, MBTA rider comfort is at its highest reported level in two years of surveying. Other employer-sponsored financial supports continue to follow as the next most popular measures to incentivize a decrease in drive-alone commuting.	Employers must continue to recognize their role in the mobility health of our region. They should explore and implement a variety of options available for subsidizing non-SOV commuting modes such as: transportation debit cards; subsidized or pre-tax flexible fare products through PERQ; parking cash-out programs; mode-based monthly subsidies and more.

INTRODUCTION

Over the course of late Summer 2020 into Spring 2021, A Better City (ABC) partnered with the City of Boston's Transportation Department (BTD) and The Energy Foundation to broadly survey Boston commuters and engage in deep-dive interviews with Boston employers to understand how commute patterns and commuter choices have been shaped by the COVID-19 pandemic and its after effects.

A year after widespread vaccine availability yielded the first significant reduction of many COVID-19 restrictions, we reengaged our commuter survey respondents and employer distribution partners to collect another round of data in this evolving reality. In this round, nearly 1,400 Metro-Boston commuters shared insights on how their approaches to commuting have continued to shift as activity levels in the region rebound.

SURVEY STRUCTURE & DISTRIBUTION

Through its Transportation Management Associations (TMAs) and core membership, A Better City conducted direct outreach to over 100 medium- and large-sized Boston employers and property managers for six weeks beginning in March 2022. The City of Boston marketed the survey through its social media and communication channels. Through these efforts, the survey garnered 1,399 complete responses from employees working primarily in the business professional, medical, and educational
industries.

In order to secure engagement from a wide variety of respondents, the survey once again made use of skip logic to move survey takers efficiently through questions most relevant to them. Depending upon their commute mode prior to the pandemic and their indicated level of commitment to either commuting sustainably or driving alone, respondents saw between 20 and 30 questions in the survey.

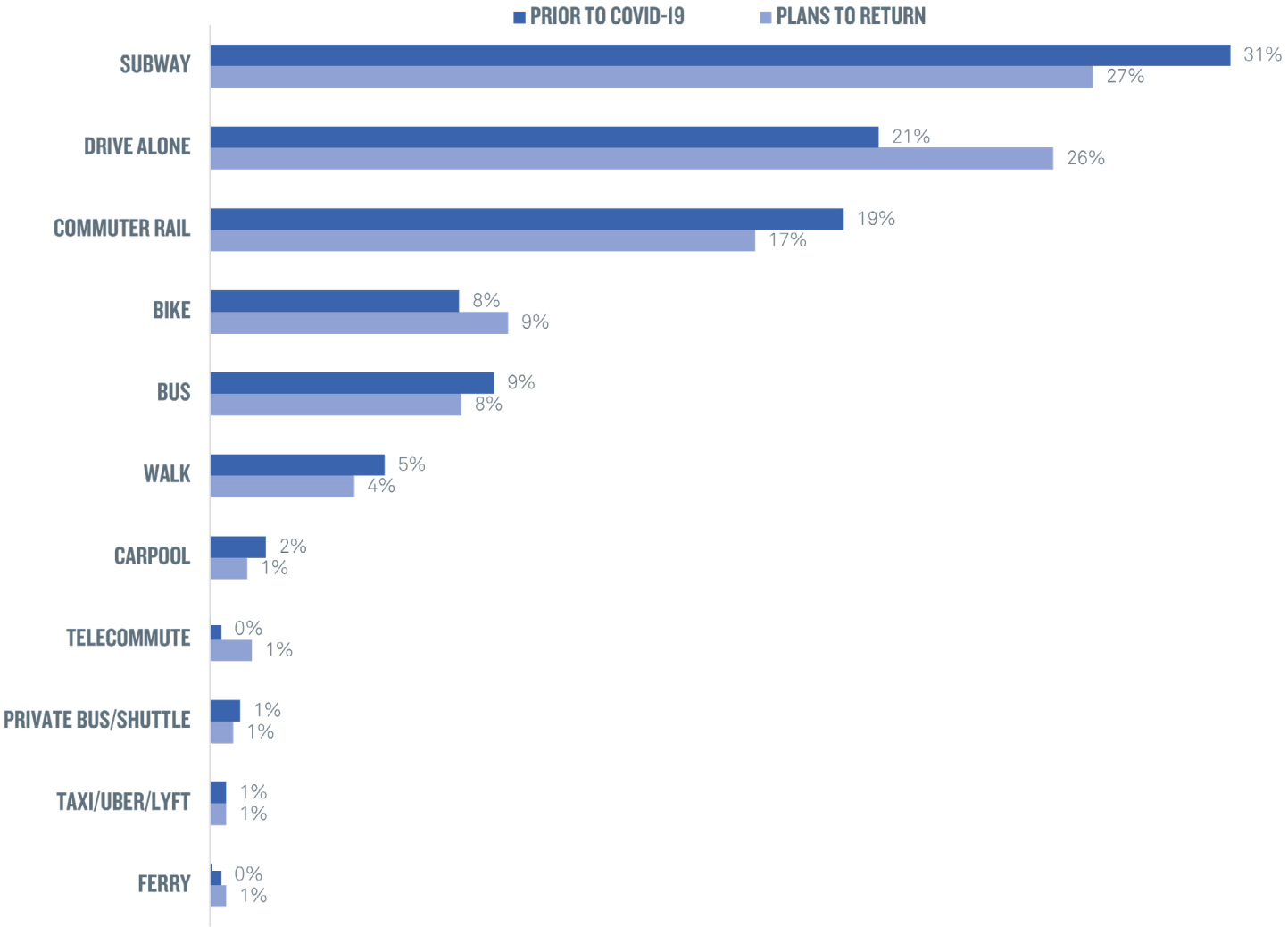
FIGURE 2: PEOPLE WAITING TO BOARD A BUS

KEY TAKEAWAYS

CITYWIDE, PROJECTED POST-PANDEMIC SINGLE-OCCUPANCY VEHICLE (SOV) COMMUTING RATES CONTINUE TO EXCEED THE PRE-PANDEMIC BASELINE

While 21% of Spring 2022 survey respondents indicate that they habitually commuted by driving alone prior to the pandemic, 26% state that they plan to do so going forward. This +5% increase holds steady from Spring 2021, which marked a sharp decrease from the massive +15% predicted increase in drive-alone commuting rates from Summer 2020 respondents. The initial sharp decrease in projected drive-alone rates followed by this yearlong plateau speaks to waning initial reactivity to the disruption of the early pandemic. It also reflects recent data showing that vehicle traffic is rebounding at a rate outpacing transit ridership despite increased telework in many industries. Taken within this context, multiple indicators are pointing to a drive-alone commuting increase our region cannot afford to accommodate from the perspectives of both environmental sustainability and workforce retention.

FIGURE 3: RETURN PLANS COMPARED TO PRIMARY COMMUTE MODE PRE-COVID-19



CYCLING COMFORT LEVELS ARE DROPPING, BUT MOST METRO-BOSTON WORKERS LIVE WITHIN BIKING DISTANCE OF THEIR WORKPLACES

The widely noted pandemic bike boom was reflected in our first two rounds of survey data, with rising levels of respondents expressing willingness to try bike commuting between Summer 2020 and Spring 2021. In the Spring 2022 data, respondents now indicate that their comfort levels with cycling are decreasing. Context for this decrease may include the completion of Phase 1 and 2 of the City of Boston's high-profile Healthy Streets initiative and national record-high levels of pedestrian and cyclist vehicle crash rates over 2021.

Survey data across all three rounds has shown that a strong majority of respondents live fewer than 10 miles from their workplaces, a distance generally acknowledged as accessible by bike or e-bike. As an emissions-free transportation mode that makes highly efficient use of roadway space, cycling is a key mobility tool for cities. Investing in infrastructure that protects those traveling by bicycle from vehicle impacts and connects underserved neighborhoods to employment centers is a crucial, low-cost strategy to improve mobility and economic vibrancy in Metro-Boston.

TABLE 2: ATTITUDES TOWARDS BIKE COMMUTING AMONG THOSE WHO SAY IT COULD BE AN OPTION FOR THEIR COMMUTE

	SUMMER 2020	SPRING 2021	SPRING 2022
COMFORTABLE OVER NEXT 2-3 MONTHS	42%	57%	50%
NOT COMFORTABLE OVER NEXT 2-3 MONTHS	40%	28%	37%
NOT SURE	17%	15%	13%

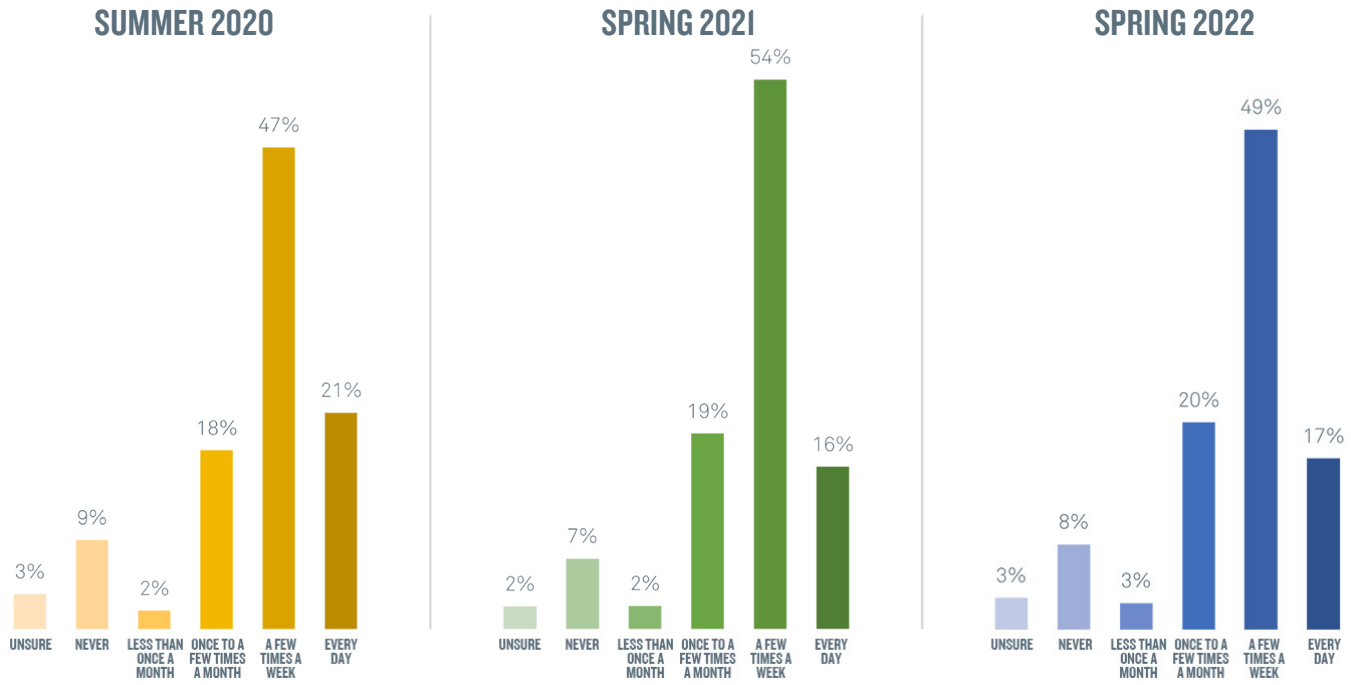
TABLE 3: DISTRIBUTION OF DISTANCE BETWEEN HOME & WORK ZIP CODES OF SURVEY RESPONDENTS

MILES BETWEEN HOME AND WORK ZIP	PERCENTAGE OF RESPONDENTS
0 - 5	44%
6 - 10	25%
11 - 25	21%
26 - 50	9%
50 +	1%

COMMUTERS' PREFERENCE FOR FLEXIBLE WORK ARRANGEMENTS REMAINS STRONG ACROSS TWO YEARS OF SURVEYING

Most commuters surveyed in Spring 2022 indicate that their preferred future frequency for telecommuting is a few times per week, which is consistent with Summer 2020 and Spring 2021 results. Taken alongside widespread hybrid work arrangements adopted by a variety of employers across industries, this sustained expression of employee preference continues to point to a permanent increase in telecommuting as a percentage of commute "trips" going forward.

FIGURE 4: SHIFTS IN ATTITUDES TOWARDS RETURN PLANS BY SURVEY RESPONDENTS (SUMMER 2020, SPRING 2021, SUMMER 2022)



SOURCE: Anticipating Post-Pandemic Commute Trends in Metro-Boston

COMMUTERS ARE COMFORTABLE CONSIDERING THE MBTA, BUT WANT BETTER FINANCIAL INCENTIVES FOR DOING SO

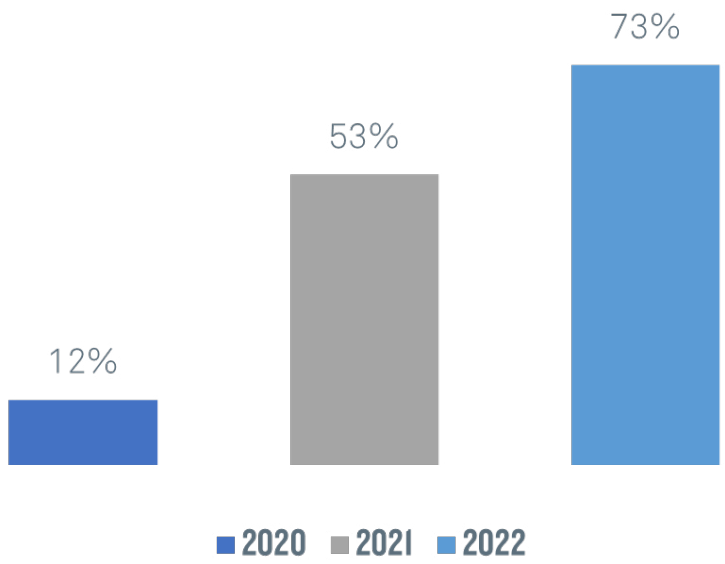
Across three rounds of surveying, self-identified drive-alone commuters have consistently identified a free or reduced-cost MBTA pass as the single most impactful measure to reduce drive-alone behavior. Other financial incentives such as carpool incentives, parking cash-out programs, and pre-tax deduction of commute costs have been consistent runners-up. Employers have a critical role to play in ensuring that the transportation benefits they offer adequately incentivize sustainable transportation modes and discourage drive-alone commuting.

TABLE 4: INCENTIVES FOR DRIVE-ALONE RESPONDENTS TO CHANGE COMMUTE MODE

INCENTIVES	
FREE/REDUCED COST MBTA PASS	53%
PARKING CASH-OUT	27%
PRE-TAX DEDUCTION OF COMMUTE COSTS	24%
CARPOOL INCENTIVES	20%

In addition to clearly showing a willingness to change behavior with the right financial incentives, Spring 2022 data also indicates the highest level of rider comfort on the MBTA over three rounds of surveying. While only 12% of behavior-changing commuters said they would feel comfortable riding the MBTA in 2020 and 53% felt the same in 2021, 73% now say they would be comfortable using the system in 2022. Notably, this number did not shift meaningfully over the response collection period despite several high-profile headlines around MBTA safety and the discontinuation of its masking policy during that time.

FIGURE 5: BEHAVIOR-CHANGING COMMUTERS WHO WOULD FEEL COMFORTABLE RIDING THE MBTA IN THE NEXT 2-3 MONTHS



Learn more about the Anticipating Post-Pandemic Commute Trends series at:
bit.ly/commutesurvey2022-learn


A
BETTER
CITY