A BETTER CITY

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ANTICIPATING POST-PANDEMIC COMMUTE TRENDS IN METRO-BOSTON

SPRING 2021 UPDATE

CITY of BOSTON

REPORT TEAM

City of Boston Transportation

A BETTER CITY

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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

As Metro-Boston grappled with everyday uncertainty resulting from the COVID-19 pandemic over the course of 2020, residents and employees of the region watched bike lanes fill, highways empty, and transit services shift. With vaccination rates now steadily rising across the region, employers, developers, and city planners have begun laying the groundwork for the policies and objectives that will guide the next mobility trends in our region as we look toward a post-pandemic future. The choice between stifling traffic congestion and a robust transportation ecosystem with multiple options is a real one during this period of transition, and every Metro-Boston stakeholder has a role to play in influencing its outcome.

In comparing 2,650+ Spring 2021 survey responses from Metro-Boston commuters against 4,200+ responses from Summer 2020, A Better City identified the following key takeaways and actionable recommendations for employers, the City of Boston, and the MBTA as workplaces plan their post-pandemic workforce policies. These recommendations build upon and complement the findings of our recently released report *Anticipating Post-Pandemic Return to Work Trends in Metro-Boston*, which focuses on how large employers are planning to bring workers back after the pandemic.

TABLE 1: KEY TAKEAWAYS & RECOMMENDATIONS

KEY TAKEAWAY	RECOMMENDATION
Though projected drive-alone rates have dropped since Summer 2020, survey results continue to predict an increase in the number of single occupancy vehicle (SOV) commuters on the road as workplaces continue to reopen.	To influence a lower volume of SOV commuters going forward, employers should discontinue COVID parking policies and develop precise understandings of the relationship between their existing parking policies and employees' commuting choices.
Active modes such as cycling continue to attract new commuters. Additionally, survey respondents' levels of reported comfort with commuting by bicycle notably increased between Summer 2020 and Spring 2021.	To capitalize upon this momentum and continue encouraging new bicycle commuters, the City of Boston should continue its push to expand cycling infrastructure across neighborhoods.
The desire for hybrid work models, defined by part-time telework, remains strong.	To avoid incentivizing hybrid employees to choose SOV commuting on their in-office days, employers and the MBTA should work closely together to expand and deploy new flexible fare products that meet the new market promised by this shift in work arrangements.
Subsidized transit passes remain the top measure identified by SOV commuters that would incentivize a decrease in their drive-alone commuting.	In addition to working together on flexible fare products, employers and the MBTA should collaborate to expand subsidy programs and widen their availability to commuters across roles and industries.

INTRODUCTION

Over the course of late Summer 2020 into Winter 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 in order to understand how commute patterns and commuter choices have been shaped by the COVID-19 pandemic.

As COVID-19 restrictions began to significantly lift at the end of May 2021, we reached back out to the commuter survey respondents and employer distribution partners we have collaborated with over the past year to revisit the survey questions posed to commuters in late Summer 2020. Over 2,650 Metro-Boston commuters responded to share updated insights on how their approaches to commuting have continued to shift as the immediate impacts of the pandemic have begun to wane.

SURVEY STRUCTURE & DISTRIBUTION

Through its Transportation Management Associations (TMAs) and in partnership with Seaport TMA and the Alliance for Business Leadership, A Better City conducted direct outreach to over 150 medium- and large-sized Boston employers and property managers in May 2021. The City of Boston marketed the survey through its social media and communication channels. Through these efforts, the survey garnered more than 2,650 complete responses from employees primarily working in business professional, medical, and educational industries by the June 15th deadline.

In order to secure engagement from a wide variety of respondents, the survey 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.

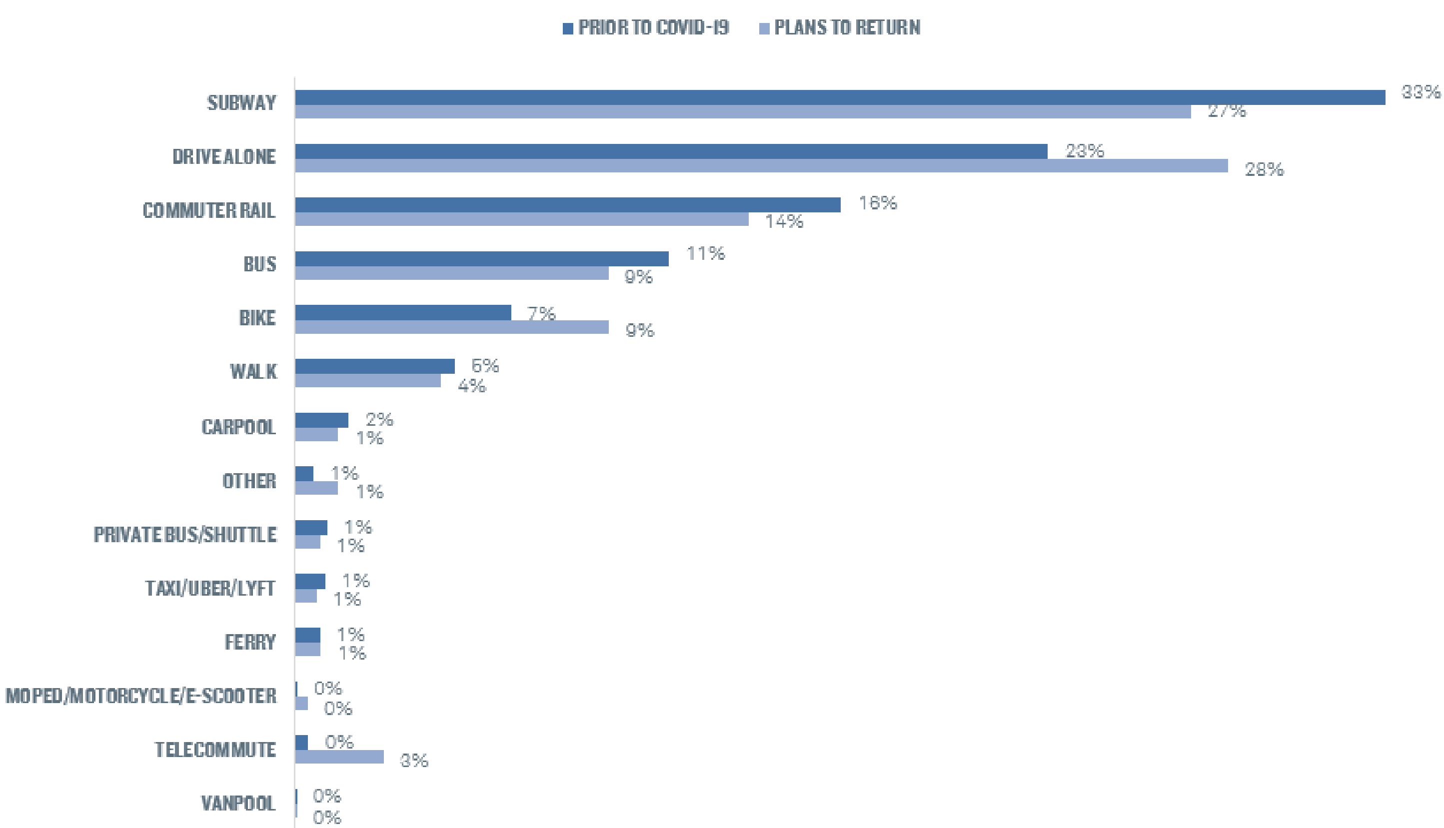
FIGURE 1: PEOPLE WALKING AND RIDING ON A BRIDGE

KEY TAKEAWAYS

CITYWIDE, PROJECTED POST-PANDEMIC SOV COMMUTING RATES HAVE DROPPED 10% SINCE OCTOBER 2020

In late Summer 2020, 23% of commuters reported that they habitually drove alone to their workplaces prior to the pandemic and a startling 38% reported that they expected to do so when welcomed back to the worksite. When surveyed in Spring 2021, an identical proportion of respondents report driving alone as their primary pre-pandemic commute mode – 23% – while a smaller group of 28% state that they plan to drive alone when their workplace fully reopens. Though this more modest projected increase of 5% represents a relatively positive shift in projected mode share, it bears remembering that Boston earned worst-in-the-nation traffic rankings in 2018 and 2019. Even a relatively small increase to the number of drive-alone commuters in the city carries the promise of increased GhG and particulate emissions along with productivity-sapping congestion.

FIGURE 2: RETURN PLANS COMPARED TO PRIMARY COMMUTE MODE PRE-COVID-19



SPOTLIGHT ON KEY EMPLOYMENT CENTERS

Responses from commuters working in Back Bay, Downtown, and Longwood show similar percentage predicted increases in future drive-alone rates compared to the full set of responses. Responses from the Seaport district show a higher projected increase, rising to 29% up from 20% pre-COVID. Downtown shows the lowest overall drive-alone rate among respondents, with a projected increase from 9% pre-COVID up to14% when workplaces fully reopen.

ACTIVE TRANSPORTATION REMAINS A STRONG ALTERNATIVE TO SINGLE OCCUPANCY VEHICLE USAGE AMONG SURVEY RESPONDENTS

As with commuters surveyed last summer, most commuters recently surveyed live within cycling or e-biking distance of their workplace (10 miles or less). Among survey respondents predicting a change to their commute mode, cycling remains the most popular non-SOV option. As a group, respondents predicting a switch to cycling are both younger and less likely to care for children under 18 than respondents indicating that they plan to begin driving alone.

TABLE 2: DISTRIBUTION OF DISTANCE BETWEEN HOME & WORK ZIP CODES OF SURVEY RESPONDENTS

MILES BETWEEN HOME AND WORK ZIP	PERCENTAGE OF RESPONDENTS
0 - 5	48%
6 - 10	25%
11 - 25	19%
26 - 50	6%
51 - 100	1%
100 +	0%

TABLE 3: DISTRIBUTION OF AGE BY MODE PREDICTIONS OF SURVEY RESPONDENTS

AGE	ALL RESPONDENTS	RESPONDENTS SWITCHING TO DRIVING ALONE	RESPONDENTS SWITCHING TO CYCLING
18 - 24	6%	3%	10%
25 - 34	36%	35%	50%
35 - 44	24%	23%	22%
45 - 54	16%	19%	9%
55 - 64	11%	12%	8%
65 +	3%	3%	0%

TABLE 4: DISTRIBUTION OF PARENTAL STATUS BY MODE PREDICTIONS OF SURVEY RESPONDENTS

ARE YOU THE PARENT OR GUARDIAN OF ANY CHILDREN UNDER 18?

	ALL RESPONDENTS	RESPONDENTS SWITCHING TO DRIVING ALONE	RESPONDENTS SWITCHING TO CYCLING
YES	24%	32%	20%
NO	74%	65%	80%

After a year of the Boston bike boom and accompanying City Hall efforts to expand safe cycling infrastructure, commuters also express a higher willingness to consider bike commuting. Among commuters identifying cycling as a possible option for their commute, those surveyed in Spring 2021 express more comfort and less hesitancy around the idea of biking to work than did those surveyed in Summer 2020. Those who currently do not feel comfortable cycling to work continue to identify dedicated bike lanes, prioritized road space for bikes, and additional off-road bike paths as the top three measures that could make it easier for them to try. These support measures align well with the results of a recent MassINC survey indicating that 75% of Metro-Boston voters support the modification of streets to include separated bike lanes.

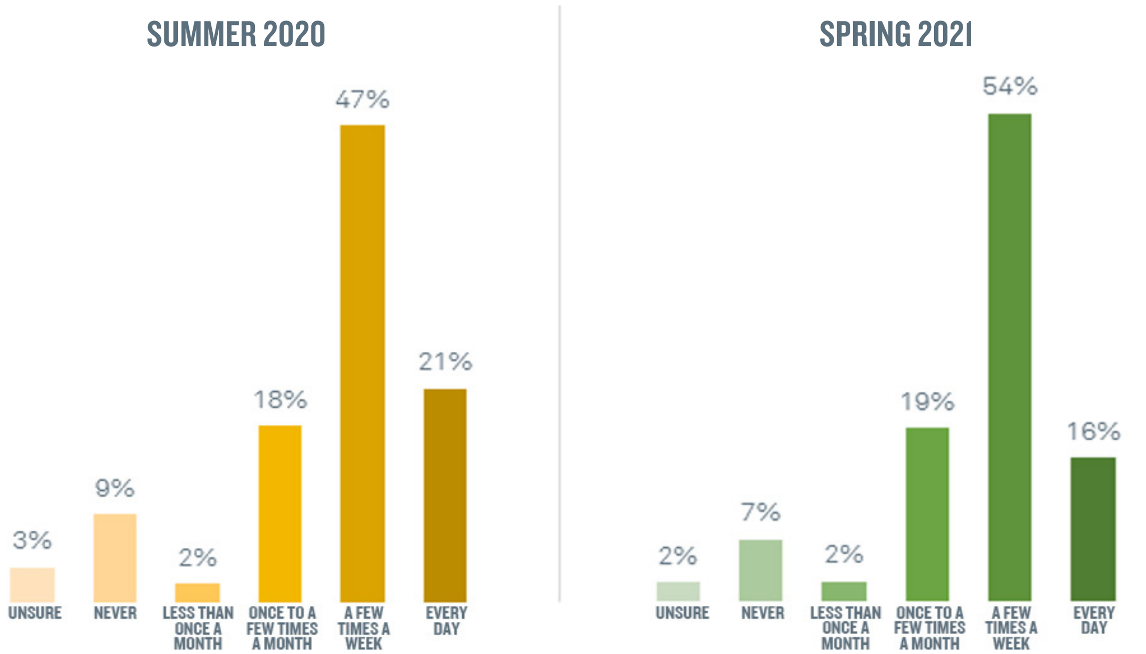
TABLE 5: ATTITUDES TOWARDS BIKE COMMUTING AMONG THOSE WHO SAY IT COULD BE AN OPTION FOR THEIR COMMUTE

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

COMMUTERS CONTINUE TO SEEK A BALANCE BETWEEN TELEWORK & IN-PERSON OFFICE TIME

As in Summer 2020, the majority of commuters surveyed in Spring 2021 indicate that their most preferred future frequency for telecommuting is a few times per week. Compared to Summer 2020, slightly lower percentages express preference for the extremes of teleworking either every day or never.

FIGURE 3: SHIFTS IN ATTITUDES TOWARDS RETURN PLANS BY SURVEY RESPONDENTS (SUMMER 2020 VS. SPRING 2021)



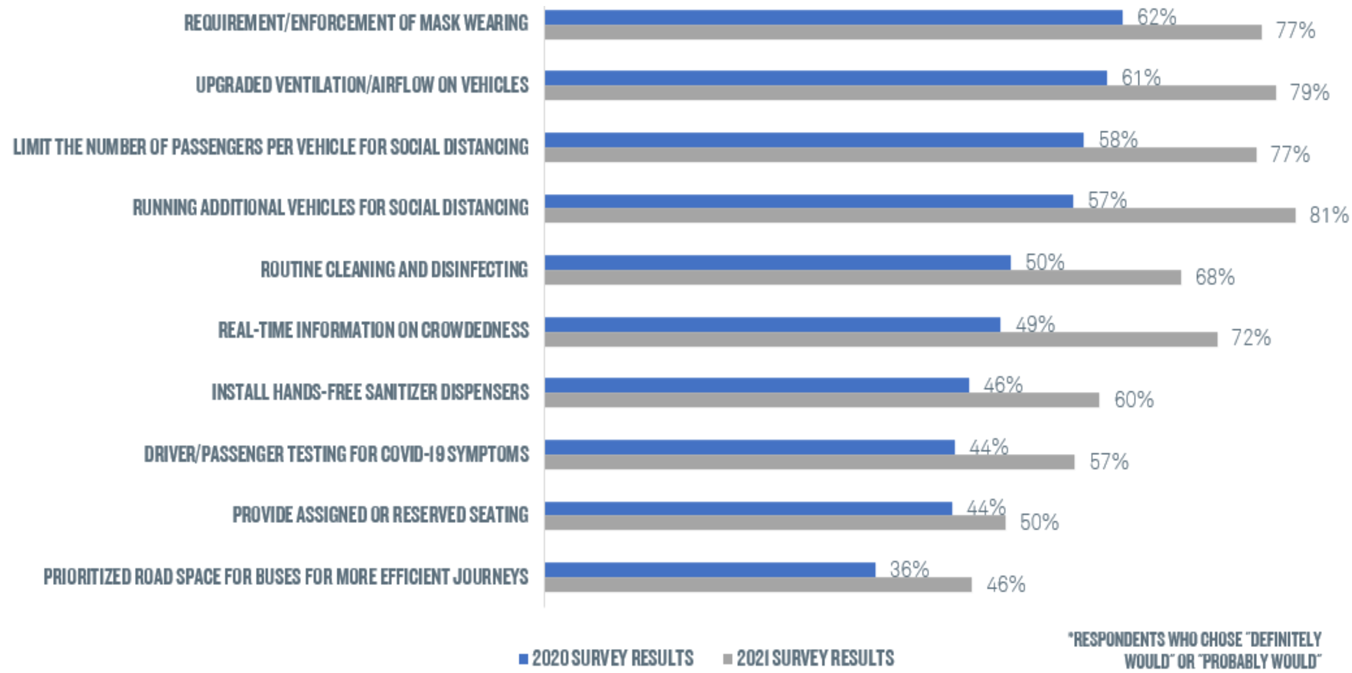
SOURCE: Anticipating Post-Pandemic Commute Trends in Metro-Boston

Taken together with recent employer survey data released by the Mass Competitive Partnership, this sustained expression of employee preference suggests that the success of widespread telework over the pandemic is poised to drive increased utilization of this work arrangement into the future.

COMMUTERS ARE MUCH MORE COMFORTABLE CONSIDERING THE MBTA, THOUGH THERE REMAINS A DISCONNECT BETWEEN THE EFFORTS THE MBTA IS MAKING TO INCREASE RIDERSHIP AND THE PERCEPTIONS OF RIDERS

Of commuters who in Summer 2020 expressed either uncertainty or the intention to switch their future commute mode, only 12% thought that they would feel comfortable riding the MBTA over the course of the ensuing 2-3 months. In the latest set of responses, that proportion has increased over fourfold, with 53% of commuters who indicate uncertainty or a predicted change to their commute mode stating that they would feel comfortable riding the MBTA this summer. For those who do not yet feel comfortable, many of the same measures indicated in Summer 2020 remain desirable: upgraded ventilation, additional vehicles to allow for social distancing, limiting the number of passengers in vehicles, real-time crowding information, and enforcing a mask requirement.

FIGURE 4: SHIFTS IN ATTITUDES TOWARDS EFFORTS TO INCREASE COMFORT ON TRANSIT



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

Drive-alone commuters continue to identify a free or reduced cost MBTA pass as the single most effective measure to encourage them to more frequently use a sustainable commuting option, with 49% of recent respondents selecting it as a top incentive. For those who say they plan to switch from formerly using commuter rail to driving alone in the future, that figure rises to 69%. As described in the section titled "The Shifting Value of a T Pass" in ABC's recent report of employer interviews, however, employers' abilities to offer subsidized T passes in a hybrid work environment currently appear uncertain. With the MBTA recently announcing an end to its only hybrid-friendly fare product, the 5-day Flex Pass for the commuter rail, it is clear that additional collaboration with employers and flexibility in innovating new pass products will be necessary to incentivize drive-alone commuters to use transit going forward.

TABLE 6: INCENTIVES FOR DRIVE-ALONE RESPONDENTS TO CHANGE COMMUTE MODE

INCENTIVES	
FREE/REDUCED COST MBTA PASS	49%
SHUTTLE TO TRANSIT STATION	20%
CARPOOL INCENTIVES	17%
PARKING CASH-OUT	17%

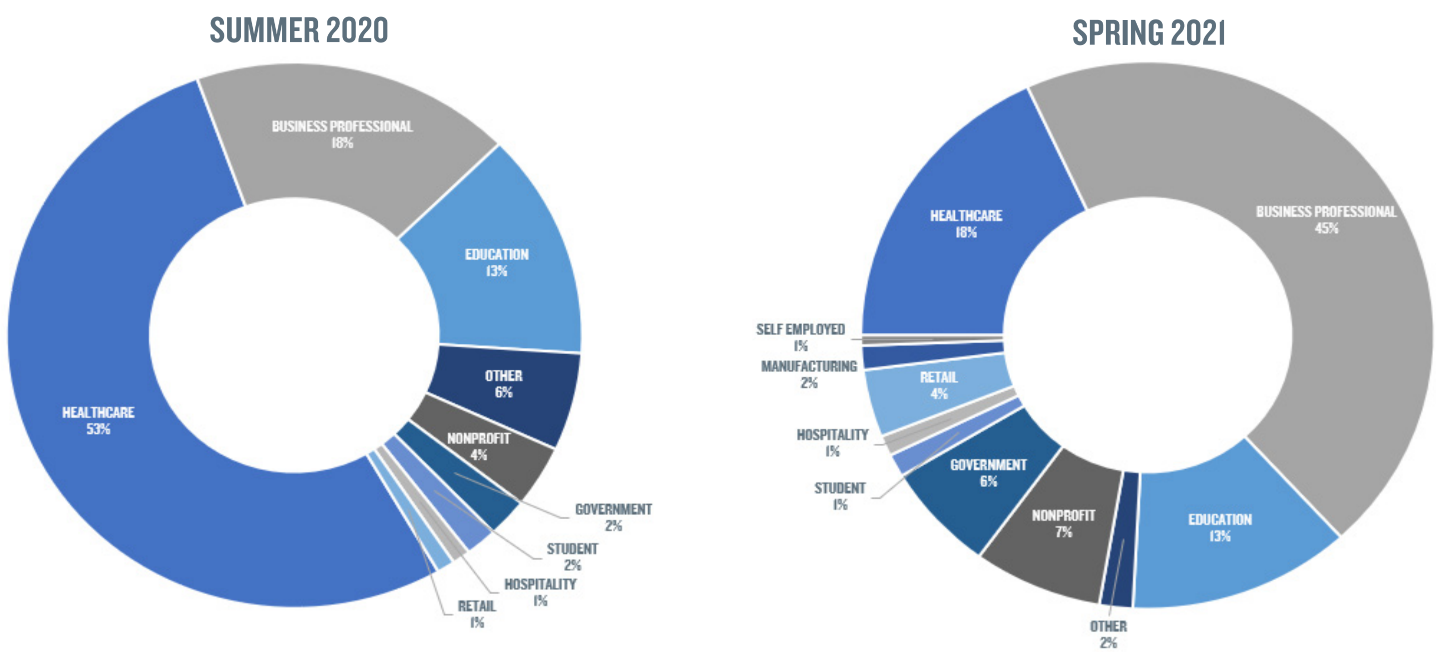
TABLE 7: DISINCENTIVES FOR DRIVE-ALONE RESPONDENTS TO CHANGE COMMUTE MODE

DISINCENTIVES	
CONGESTION PRICING/TOLLING FOR SOVs	41%
INCREASED PARKING FEES	35%

NOTE ON DEMOGRAPHICS

Compared to the pool of respondents who completed this survey in Summer 2020, the most recent group of respondents includes fewer healthcare workers and more business professional employees. The top three industries represented remain Education, Healthcare, and Business Professional. This group of respondents is also split slightly more proportionately across genders, with the percentage of male-identifying respondents rising from 24% in Summer 2020 to 35% in Spring 2021.

FIGURE 5: INDUSTRY DISTRIBUTION OF SURVEY RESPONDENTS



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

Despite these shifts in demographics, reported pre-pandemic commute modes remain fairly steady across the two survey groups with the exceptions of the Spring 2021 group self-reporting slightly lower commuter rail utilization and slightly higher cycling rates.

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