A BETTER CITY

REPORT | JUNE 2021

ANTICIPATING POST-PANDEMIC RETURN TO WORK TRENDS IN METRO-BOSTON

CITY of BOSTON

ACKNOWLEDGEMENTS

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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.

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EXECUTIVE SUMMARY

COVID-19 disrupted our lives and our regional economy in a way not seen in generations. The pandemic has also broadened our thinking about how we work and how we move around the region, highlighting the essential roles that public transit and public space play in the health of our citizens, vibrancy of our communities, and the strength our economy.

The pandemic has not been without its paradoxes. The MBTA served as a critical lifeline and moved hundreds of thousands of people on average—essential workers—during each day of the pandemic, yet officials used that number to justify deep cuts in service to save money, cuts which have proven difficult and expensive to restore.

For two years prior to the pandemic, metro-Boston was ranked 'worst in the nation' for traffic congestion. Even with increased telework opportunities, we expect substantial workplace return is likely and will require full service transit options that are safe, convenient, and affordable. High quality transit will remain essential to our quality of life, the health of our economy, our ambitious sustainability goals, and to addressing issues of equity.

A Better City conducted eleven interviews with member companies across six sectors in fall 2020 and winter 2021 to forecast, from the employer perspective, the 'future of work' and related commute patterns and to better understand how our individual and collective choices can shape the future. These interviews build upon the results of 'Anticipating Post-Pandemic Commute Trends in Metro-Boston'—an employee-based commuter survey completed in September 2020—and inform the key takeaways below.

Between these interviews and publication of this report, Governor Baker signed sweeping environmental legislation that puts further emphasis on net zero carbon targets and strengthens regulations regarding GhG emissions from the transportation sector. The governor also announced an accelerated timeline to reopen the state on May 29th and to lift the State of Emergency on June 15th. These are key triggers for most companies to return to the office and we offer the findings and recommendations below to help inform that process.

KEY FINDINGS

RETURN TO THE OFFICE WILL BE HYBRID TO START.

In a way that seemed unthinkable prior to COVID, employers have indicated a willingness to embrace a hybrid telework model that 65% of surveyed employees desire. Childcare was the top non-pandemic related factor that will shape telework policy moving forward.

DOWNTOWN OFFICES WILL REMAIN, AND BE RECONFIGURED.

Our interviewees acknowledged the value of teams working in the same space. Mentorship, onboarding, and teambuilding are muted in a remote environment and all expressed a desire for a thoughtful blend of office and home work moving forward. Given this variance of worker demand by day, expect office layouts to be more flexible — like co-working spaces — with common areas for collaborating, quiet spaces for thoughtful work, a mix of shared and dedicated desks, and more.

HYBRID WORK MODELS MAY FACILITATE DRIVE ALONE COMMUTES.

Many companies subsidized parking during the pandemic, citing safety concerns and employee comfort. If this continues, there is a real threat that a static amount of car parking can satisfy more drivers under a hybrid work model. If employers choose to incentivize driving once COVID is managed, the region could once again be crippled by congestion and harmful greenhouse gas and particulate emissions.

HYBRID WORK MODELS CHANGE THE VALUE PROPOSITION OF A MONTHLY T PASS.

A monthly MBTA pass for bus and subway costs $90, and for Commuter Rail ranges between $90 - $426 depending on zone of travel. Paying full price becomes difficult to justify for either the employer or the commuter if an employee will only come to the office a few times per week.

ACTIVE TRANSPORTATION IS POISED FOR BREAKOUT SEASON.

During the pandemic, Boston and surrounding cities opened miles of safe bicycling infrastructure to encourage outdoor activity. MassDOT created and then extended the Shared Streets grant program to support 'quick build' projects that promote bicycling and walking. BlueBikes have exceeded pre-pandemic ridership levels. More than half of employers we spoke with reported 'robust' or 'overcapacity' use of their bicycle parking. The pandemic is waning as the peak cycling season arrives, and two-thirds of employees surveyed live 10 miles or less from work. The stage is set for active transportation to emerge stronger post-pandemic.

RECOMMENDATIONS

These insights shed light on what could come next and the range of possibilities that may make up the "new normal." The choices we make right now – employers, municipal governments, the MBTA, and each one of us – will dictate the transportation future we move into as the pandemic subsides. If we are to emerge from this pandemic stronger – *to build back better* – we all have a role to play.

The Commonwealth's economy reopened over Memorial Day weekend—two months earlier than anticipated. As companies map out their workplace returns, A Better City offers a set of recommendations to address some of the pitfalls identified during the interview process, and to support actions to maintain and expand some of the positives.

1. *To avoid a return of crippling congestion and related GhG emissions, employers should reconsider pandemic related parking subsidies. Further, they should implement balanced commuter benefits that promote cleaner commutes, flexibility, and choice. Salient parking rates and flat rate transportation stipends are two ways that reduce driving and promote transit use.*

2. *The MBTA should pursue a targeted marketing and partnership strategy for employers, with a focus on tailored fare products that reflect a shift from traditional peak-based commutes to more flexible schedules. The T must actively court ridership through a robust public outreach campaign that highlights convenience and safety, and to ensure adequate service levels to accommodate commuters as they return.*

3. *In an effort to promote a vibrant recovery and encourage active and green mobility, Boston and other municipalities should accelerate the reconfiguration of roadways for the highest and best use of that public space. This includes expanding space for people to dine, to walk and bike, and to facilitate efficient and reliable public transit through bus priority lanes.*

ITEMS TO WATCH

Telemedicine: Forced by COVID and recognized by the Massachusetts legislature, telemedicine is here to stay. Combined with remote work, telemedicine allows our urban hospitals to shift precious space from clerical use to clinical for delivery of more onsite acute care. This has the potential to exacerbate campus related congestion and presents an opportunity for further study.

Income tax across state lines: In October 2020, New Hampshire filed a lawsuit against Massachusetts in the Supreme Court questioning the legality of levying Mass. income tax on someone working remotely from the Granite State. The outcome of this case could have ripple effects across the nation.

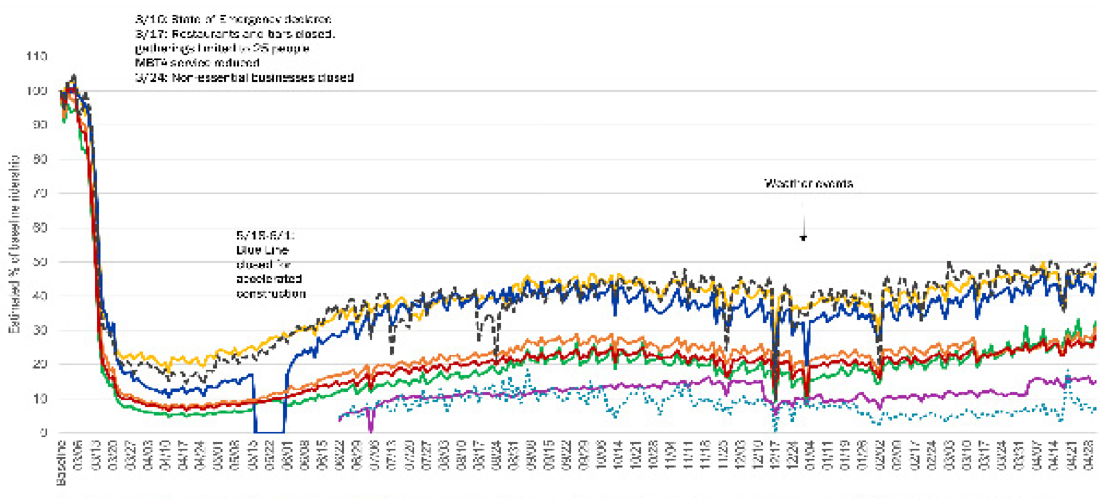
INTRODUCTION

In August and September of 2020, in partnership with the City of Boston's Transportation Department (BTD) and with support from The Energy Foundation, A Better City (ABC) conducted an employee-focused survey. The goal was to better understand commute patterns prior to COVID-19, how the pandemic had impacted commuter choices, and how commuter behavior might change in the anticipated future beyond the pandemic.

Under Governor Baker's order on March 10, 2020, Massachusetts entered a State of Emergency due to the threat of the COVID-19 virus. Many employers sent their workforces home by the end of that week and on March 23rd the Governor ordered all non-essential businesses closed. The Commonwealth economy paused, bringing drastic changes to work and life patterns overnight. Roadways emptied of traffic, skies were free of planes, and MBTA ridership plummeted to just one-tenth the daily average of 1.2M trips (see Figure 1). Through April and into May, when a cautious and phased reopening plan was laid out by the Governor, it became clear that these transportation disruptions could remain for some time.

FIGURE 1: COVID IMPACT ON MBTA RIDERSHIP

WEEKDAY RIDERSHIP BY LINE AND MODE - INDEXED TO WEEK OF 2/24



SOURCE: May 10, 2021 Report from the General Manager to Fiscal and Management Control Board

More than 4,200 commuters participated and ABC published the results in a November 2020 report entitled *'Anticipating Post-Pandemic Commute Trends in Metro-Boston'*. These results expanded the growing body of knowledge around remote work practices (telework), employee attitudes and desires, and how future commute patterns might emerge and be shaped.

The commuter-focused survey provided a clear picture of employee preferences for the future of work, but it did not capture the employer perspective. In Fall 2020 and Winter 2021, ABC conducted Phase Two of this survey effort, which focused on the plans, perspectives, and strategies of our employer partners.

Engaging organizations of various sizes and sectors, step one was to collect baseline data from each company. This included workforce size, telework prevalence before and during the pandemic, current transportation incentives offered, projected 'return to the office' plans, and more. ABC then performed a series of targeted, deep dive interviews with eleven of those companies, the results of which are compiled in this report. Our intent is to illuminate the macro trends around workplace return and explore how they might affect the metro-Boston region as we seek to *build back better* after the pandemic.

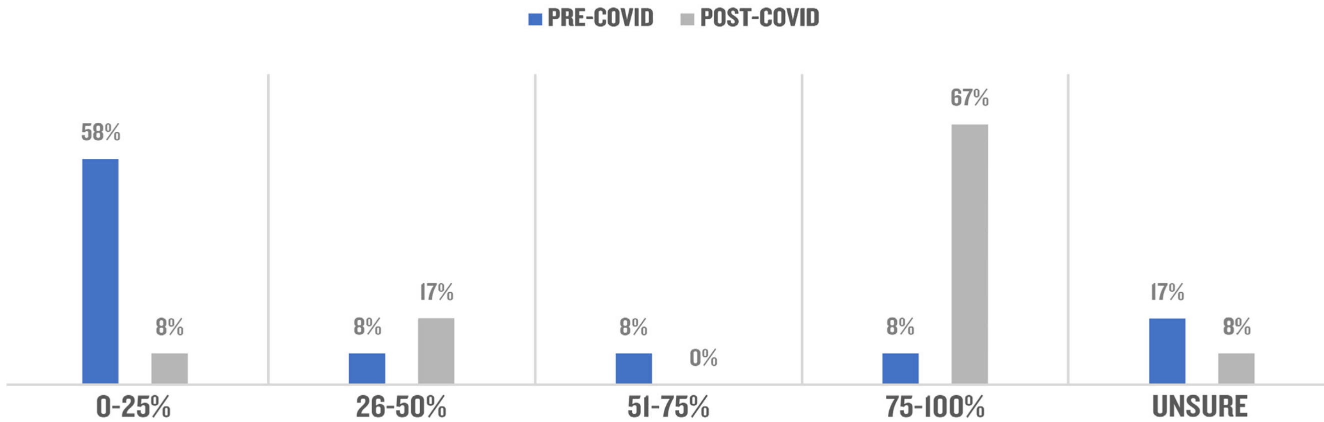
This report was finalized in the days after the Centers for Disease Control and Prevention announced a loosening of mask guidelines for those who have been vaccinated. Governor Baker subsequently announced an accelerated timeline of May 29th to lift most COVID-19 restrictions and June 15th to end the State of Emergency in Massachusetts.

DISCLAIMER

To preserve anonymity, the names of companies or organizations do not appear in the survey results. The participating companies represent the professional services, healthcare, education, financial services, consumer goods, and commercial real estate sectors. Organizational size broke down to roughly 25% fewer than 500 employees; 25% between 500-1000; and 50% more than 1000. All participating organizations operate within the City of Boston or inner suburbs. As with our original commuter focused survey, the retail and hospitality sectors did not participate in this effort.

2020 RECAP: TELEWORK STRESS TEST

FIGURE 2: RATES OF TELEWORK BEFORE AND DURING THE PANDEMIC



Based upon our Phase Two employer intake form and the results of our Phase One commuter survey, we know that prior to the pandemic roughly 85% of the workforce had little or no experience with telework. Despite advances in mobile technology, the rise of flexible workspaces, and collaboration tools, telework had a negative association with unproductivity.

Before the pandemic however, some organizations saw opportunity in flexibility and had a strong foundation in place to enable a seamless transition to remote work. Foundational elements included the use of portable laptops versus desktop machines, company-wide cloud storage and computing services, and HR support of flexible work situations. When COVID hit, organizations like this did not skip a beat because the systems and culture to support remote work were already in place.

Organizations that had to adjust on the fly needed rapid-response tactics to navigate the abrupt transition to remote work. In the early days of the pandemic lockdown, most employers utilized a simple strategy: they allowed employees to take chairs, monitors, and other desk items home – whatever might bring more order and comfort to their home work environment. This was done either on the day the workplace closed or during managed, staggered office visits in the days and weeks hence.

- Flat rate stipends directly to each employee to cover telework transition costs (example, $500)

- Reimbursements to staff for office supplies, receipt required, with hard cap on spend per employee

- Negotiated discounts with suppliers like WB Mason that enabled employees to shop online and have items shipped direct to them. In some instances, the company paid the bill, while in others the employee paid the discounted rate and was allowed to keep the item(s)

AFTER MORE THAN A YEAR, WE CAN DECLARE THAT THE FORCED TRANSITION TO TELEWORK HAS BEEN LARGELY SUCCESSFUL. THAT TEAMS AND ORGANIZATIONS HAVE NAVIGATED THE DISRUPTION WITHOUT THE EXPECTED DROP IN PRODUCTIVITY THUS FAR IS A CAUSE FOR CELEBRATION.

One large institution retained the services of an 'ergonomic consultant' who provided tailored advice during one-on-one sessions with individual employees. The goal was to ensure their remote setups were as healthy and conducive to productive work as possible.

After more than a year, we can declare that the forced transition to telework has been largely successful. That teams and organizations have navigated the disruption without the expected drop in productivity thus far is a cause for celebration.

Now, with more than 60% of adults* in the Commonwealth having received at least one vaccination shot, 'return to office' plans are beginning to form in earnest. But many questions remain.

For example, what sort of reimbursements might be appropriate for an employee that is allowed – or even required – to work remotely? Will internet and cell phones be reimbursed and, if not, should they be? Several respondents reported instances where employees asked for utility bills to be reimbursed. Full-time telework requires full-time climate control and there is a cost associated with that. These individual requests were rejected but the larger question is yet to be resolved.

New Hampshire has sued Massachusetts, questioning the legality of levying Mass. income tax on someone working remotely from the Granite State. The outcome of such a hearing could have ripple effects across the nation for those who have chosen to relocate their home to another state while retaining their job. These questions and more remain open. Further research is needed to fully understand the potential scope and solutions to them.

IS THE DOWNTOWN OFFICE DOOMED?

Pandemic media has tended to the negative, spotlighting empty downtowns and shuttered storefronts while pondering a future in which office downsizing would be widespread. With companies of all types and sizes now comfortable that productivity would not suffer with telework, the very existence of the downtown office model has seemed in jeopardy. Our conversations with commercial landlords and tenants alike have not supported that sentiment, at least for the office leasing market. While the future has been murky up to this point, the tenants included in this study do not plan major changes until the uncertainty of the present moment has passed.

In our conversation with one of the region's largest property managers, we learned that nearly 100% of their office leases are being paid each month despite actual daily occupancy averaging below 10% for most of the pandemic. This steadiness is due in part to the nature of business leases, which tend to be multi-year and are designed to provide business continuity, not necessarily support rapid change.

*As of 5/20/21

FIGURE 3: EMPTY STREETS IN BOSTON (STATE STREET)

SOURCE: Marissa Rivera, Fall 2020

Another organization, which is near the end of their lease, told us they recently opted for a one-year extension. The reason? To buy some time, gather more data points, and avoid making a stay-or-leave decision while the full scope and scale of the pandemic is still unknown.

There have been recent positive announcements from companies like Amazon, which is moving ahead with a 3,000-person office in Seaport, and Sasaki, which has chosen to move into downtown from its long-standing HQ in Watertown. Time will tell the full story, of course, but at least for now it seems the downtown office model will endure.

The forecast for commercial office tenants stands in stark contrast to the outlook for retail tenants, which have needed lease restructuring agreements to help weather the economic impacts of the pandemic. These retail tenants include national and international brands with large space commitments in prominent locations. As one property manager put it, “I don’t believe that it’s good to evict.”

The obvious caveat to this section is the large number of independent businesses, ‘Mom and Pop’ shops, and restaurants that have temporarily or permanently closed during the pandemic. It remains to be seen if new small businesses will backfill into now empty spaces as the pandemic subsides but new data released by the Downtown Boston Business Improvement District on May 1st gives reason for hope. They report that 85% of ground level retail and 60% of restaurants in their area have reopened, in addition to a 95% increase in foot traffic since December, as captured by passive sensors.

HERE TO STAY: THE SCOPE OF TELEWORK MOVING FORWARD

THE 'FUTURE OF WORK' IS A POPULAR TERM BUT ONE THAT DOES NOT YET HAVE A CLEAR DEFINITION. IT IS A PUZZLE THAT BUSINESS LEADERS, POLICY MAKERS, PROPERTY OWNERS, AND TRANSIT PROVIDERS ARE ALL TRYING TO SOLVE.

If we accept the above premise that downtown offices will remain viable and continue to host some number of workers, the question remains: how many? The consensus is that we have collectively passed the 'telework stress test' and have proven many types of jobs can function in a remote environment. Productivity has not suffered and attrition has been low. Some organizations reported expanding their staff during the pandemic. Where consensus has not yet emerged, however, is on exactly what proportion of the workforce will be remote in the future.

The 'future of work' is a popular term but one that does not yet have a clear definition. It is a puzzle that business leaders, policy makers, property owners, and transit providers are all trying to solve.

A portion of the 'non-essential' workforce has been back in the office nearly the entire pandemic. Most of our respondents indicated they have been operating reduced capacity environments with COVID protocols since last summer.

According to the organizations we interviewed, the reason workers have come in varies by employee. Some rely on heavy computing power that is not available at home. Others perform work in environments - like test labs - that cannot be replicated at home. Still others simply prefer their office work environment as superior or more conducive to productivity. For these use cases, managed access to their workplace with strict COVID protocols in place has been effective.

The companies that made their offices safe and accessible report that they have let employees make the decision about when and if to work from the office. Their managers acknowledge that productive work is getting done remotely and their paramount consideration is the safety and comfort of the employees. And so, at least until large-scale vaccination is achieved, the choice is between staff and direct managers, not mandated from the leadership suite.

One interesting data point we uncovered in these interviews is that regular daily occupancy in many offices was far below capacity **prior to the pandemic**. One firm noted that only 65% of their team was 'at their desks' on any given workday, with that average dropping to 60% for Mondays and as low as 45% on Fridays. There are many factors at play beyond telework in the calculation of this average, including the regular cadence of vacation and personal time, business travel, childcare considerations, offsite local meetings, and more. All of these factors affect office occupancy and suggest a future that relies more on telework may not change working patterns to the extreme levels currently being pondered.

In our conversations, just one organization indicated they plan to be entirely back in the office, full-time. “We are not a work from home company,” the CEO reportedly communicated to their staff. “We will definitely be back.”

But the above statement was an outlier in our conversations. The prevailing sentiment from the other participants is that flexible scheduling and remote work options are now expected by employees, whether seen as a perk or part of compensation, and will be part of the ‘future of work’ mix. To not offer such flexibility would put employers at a competitive disadvantage for talent in an already competitive market.

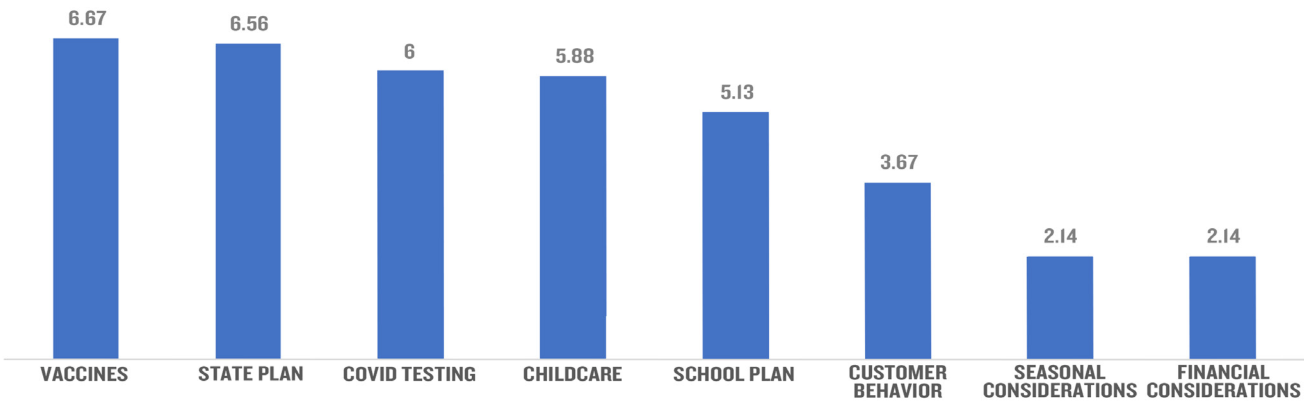
THE PREVAILING SENTIMENT FROM THE OTHER PARTICIPANTS IS THAT FLEXIBLE SCHEDULING AND REMOTE WORK OPTIONS ARE NOW EXPECTED BY EMPLOYEES, WHETHER SEEN AS A PERK OR PART OF COMPENSATION, AND WILL BE PART OF THE ‘FUTURE OF WORK’ MIX. TO NOT OFFER SUCH FLEXIBILITY WOULD PUT EMPLOYERS AT A COMPETITIVE DISADVANTAGE FOR TALENT IN AN ALREADY COMPETITIVE MARKET.

This shift to a blended model is not confined to the private sector. In March of this year, Governor Baker announced that 20,000 state workers will transition to a more permanent hybrid work model. This cohort represents roughly 40% of state employees and is expected to spend part of the week at home and part in the office. “The combination of telework and in-office work will allow for a flexible and resilient workforce,” Baker wrote.

TIMING & TRIGGERS FOR WORKPLACE RETURN

So, when will the shift back into the office start? Most companies interviewed tied it to widespread availability of vaccinations and will track closely with the lifting of the State of Emergency and other government guidance. Forty five percent targeted July, 22% were unsure, and the rest indicated their workplaces were already open. Most employers expect to return gradually and plan to utilize occupancy caps, lunchroom restrictions, and protocols like distancing and mask mandates for the foreseeable future. Forty two percent reported they will adopt a ‘phased’ approach to office return, which could mean phased by number of employees or phased by number of days per week. The remaining 58% said they were still unsure.

FIGURE 4: FACTORS SHAPING TELEWORK POLICIES



It is important to note the ranking of triggers here. The three highest scores went to health factors that are external to these organizations: state guidance, vaccines, COVID testing. The next two highest scores went to childcare availability and school plans, indicating that employers are highly sensitive to the disruption caused by uncertainty with childcare.

"The exit [from the office] was fast and furious," one participant remembered. "Re-entry will be slow, thoughtful, and focused on safety."

WHY THE OFFICE STILL MATTERS

Several common themes emerged in our conversations that inform why a return to the office is desirable, and to some degree perhaps inevitable. As noted in the 'Here to Stay' section above, there was near universal consensus that telework can be successful and will be incorporated at some level into the future of work. However, full-time remote work for all is not a likely outcome for any company we spoke with.

WHILE ALL COMPANIES ARE RELIEVED TO MAINTAIN THEIR WAY THROUGH THE PANDEMIC, THERE IS ACKNOWLEDGEMENT OF THE SUBTLER DIMENSIONS OF WORK THAT ARE HARD TO REPLICATE WITHOUT PHYSICAL PROXIMITY.

Under pandemic restrictions, the ability for teams to interact remotely and produce quality work proved sufficient to keep things moving. The key word here is 'sufficient.' While all companies interviewed are relieved to maintain their way through the pandemic, there is acknowledgement of the subtler dimensions of work that are hard to replicate without physical proximity.

Our participants shared a lot about how teams are unique organisms, and that culture and camaraderie matter. They note that proximity facilitates bonding and enables chance encounters and serendipitous sidebars, and how these in turn can generate new ideas and enhance productivity. As one company condensed it, "Elbow to elbow is how the best work gets done."

More pragmatically, the functions of mentorship, coaching and onboarding new employees are muted in a virtual format. We heard specific concern about disconnection regarding new hires, who may have difficulty tapping into the 'company vibe' remotely, and thus be more susceptible to burnout and turnover.

While no specific research has been done, several companies acknowledged the greater desire of younger workers to come into the office and the contrasting ease with which older employees were able and willing to work remotely. Maintaining effective cross-pollination between those levels of experience and energy will be important for team cohesion, we were told.

Several of our conversations touched on [the effects of pandemic fatigue and the real sense of loss due to remote work](). For many companies, 2020 was the first year without a holiday party, something felt more acutely than other COVID disruptions. Just because telework has performed well so far in this crisis does not ensure teams can sustain this level of productivity in perpetuity.

There are of course the bottom-line reasons to come back. As one company flatly stated, "Downtown is where our clients are."

The Roaring Twenties were the last post-pandemic period in our history. If those years are any guide, people's desire to be connected physically and culturally in dense urban areas will return. A more contemporary comparison might be the strong rebound of Manhattan office space after the terrorist attacks on 9/11. The when and how of return to the office still need to be clarified, but every single company we spoke with is looking in that direction for some portion of their workforce.

OFFICE LOGISTICS IN THE NEW NORMAL

'DE-DENSIFICATION' AND OTHER NEW TERMS

In this report, we have described two likely future trends based on our conversations: one where commercial leases are largely maintained; and the other whereby office occupancy will be reduced in the future through greater adoption of telework policies. Combine those trends and you have a new concept called 'de-densification.'

One of our respondents coined the term, which means the overall footprint of the workplace stays roughly the same but the amount of square footage dedicated to each employee increases. Rather than following a 'one employee, one desk' approach, a de-densified workplace will have a mix of open and private areas, including some for collaboration and others for heads down work, with a mix of dedicated and shared spaces.

Complementing this new approach is the idea of employee classification by 'persona' to help plan future capacity needs. For example, IT and data center folks might be classified as 'essential persona' and expected to be in the office full-time. Field-based teams that visit the office just a few times per month could be considered 'transient persona.' Some clerical staff might be designated 'fully remote persona,' as indicated by our respondents in the healthcare industry (see 'Clerical to Clinical' section below).

The number and breakdown of personas will vary by company, of course. Each persona will have a different demand for office time and require a different type of environment when there. Implementing such classification strategies ensures future planning for daily staff levels and, by extension, the furniture and layouts required to host them productively, will be much more effective.

FIGURE 5: WILL PRIVATE OFFICES RESEMBLE CO-WORKING SPACES?

IMAGE COURTESY OF: Workbar

ACCESS PROTOCOLS, CONTACT TRACING, & COVID KEYS

For most companies dealing with the sudden lockdown last March, managing employee access to the office was a manual process. Typical protocols required the employee to send an email declaration to a designated office coordinator who approved or denied each request. Employees had to report body temperature, lack of COVID-19 symptoms, any recent travel, and agree to the stated rules of the office environment. For reasons of scale and sanity, that rudimentary system evolved rapidly.

Digital tools like centralized smartphone apps and online forms were developed to gather the same information and also offer simplified contract tracing if required. Some companies went further still, launching systems to track employee headcount and movement while in the office. These systems range from simple badge swipe trackers to complex passive tracking sensors mounted all around the workplace. In both cases, the goal was to monitor crowding and have robust information for contact tracing should that be necessary.

Property managers also played a role here. Building access and lobby traffic management became very detailed logistical operations. Hand sanitizer stations became ubiquitous. Temperature checks in lobbies were common, performed either by a technician or through passive infrared detection. High-rise buildings used elevator assignment, capacity limits, and even separate entrances for different elevator banks to help minimize crowding at pinch points and keep different teams separate.

SAFETY- AND ALSO THE PERCEPTION OF SAFETY - HAS BEEN THE FOCUS OF EMPLOYERS AND PROPERTY MANAGERS ALIKE WHO WANT THEIR WORKFORCE AND GENERAL PUBLIC TO FEEL SAFE.

'COVID Keys,' those small brass items that allow you a 'touchless' way to push buttons or pull open drawers, became popular. One company we spoke with purchased thousands of them for distribution with wipes, masks, and sanitizer in employee 'COVID Kits.'

Safety – and also the perception of safety – has been the focus of employers and property managers alike who want their workforce and general public to feel safe. Some manage implementation of standard protocols themselves, while others rely on third-party certification companies, like Fitwel and Medcore. The question is, how much of this will stick? Just like how 9/11 permanently changed airport security and travel protocols, we can expect some of these safety and surveillance practices to last beyond the pandemic and be part of the 'new normal.' Time will tell which ones.

> Regarding Vaccines: No organization we interviewed indicated they will require proof of vaccination from their workers, but that may change as time goes on. News media are already reporting large universities saying they will require vaccination proof from on-campus students this autumn, and the discussion around COVID-passports continues. We should consider this question unresolved.

CASE STUDY FOR FURTHER RESEARCH: 'CLERICAL TO CLINICAL' SHIFT AND HOSPITAL RELATED TRAFFIC

Areas surrounding our medical centers are some of the most congested in the region and most urban hospitals are already built out nearly to their lot lines. When the lockdown started and forced a shift to 'telemedicine' for regular check-ups and routine non-emergency items, there was some hope that transient parking demand – and associated roadway congestion – might abate. This did not materialize. In fact, trends seem to be moving in the opposite direction.

The one-two punch of telemedicine for outpatient care and telework for clerical staff has created an opportunity for hospitals to repurpose precious space used for administrative functions into acute care delivery spaces. This 'clerical to clinical' shift will ensure continued high demand on a static number of parking spaces.

The relationship between hospitals and their parking is a complex one. Parking is simultaneously a revenue stream, a necessity to enable 24/7 operations, and also a source of congestion and delay for emergency vehicles needing quick access to their trauma centers. Further study of the impact of parking and transportation policy on this particular sector is needed.

MODE MATTERS IN THE POST-COVID COMMUTE

THE DRIVING DILEMMA

Free or subsidized parking was a large part of pandemic commuter support plans for companies of all sectors and size. In our attempt to uncover what a post-COVID commute might look like, we came away with a real concern that the pandemic shift to driving alone might persist. Once an employee has a 'sunk cost' in a car and easy access to parking, it becomes much more difficult to get them onto a different mode, like transit. Consider the following example:

> Company X has 100 parking spaces and 200 employees. This ratio previously meant stiff competition for a limited resource. But if employees start alternating days of remote and office work, this could be a 'sweet spot' of balanced demand that would facilitate driving. While Company X might view this as a singular positive, the region will continue to suffer from pollution and roadway congestion if Companies Y, Z, et cetera follow suit.

What might keep this from happening? First, it is unlikely that workforces will divide neatly into cohorts by the same days each week, whether due to the uneven scheduling of meeting times, childcare concerns, or the popularity of Friday and Monday remote days. One respondent conducted a 'staggered start' pilot where employees were assigned specific arrival windows to help promote orderly and distanced rush hours. The failure rate was high and the pilot quickly ended, suggesting flexibility is superior to rigidity when it comes to employee schedules.

Second, nearly two-thirds of responding organizations have formal sustainability goals currently in place or under development. With transportation accounting for 29% of GHG emissions in the region, companies should lean into those goals as they develop commute strategies post-COVID.

Finally, the largest potential mitigating factor is cost. One mid-sized company we spoke with spends $500k annually to provide parking to roughly 100 employees – just one quarter of their local workforce. That cost is currently under formal review, along with all other commute subsidies, including transit passes.

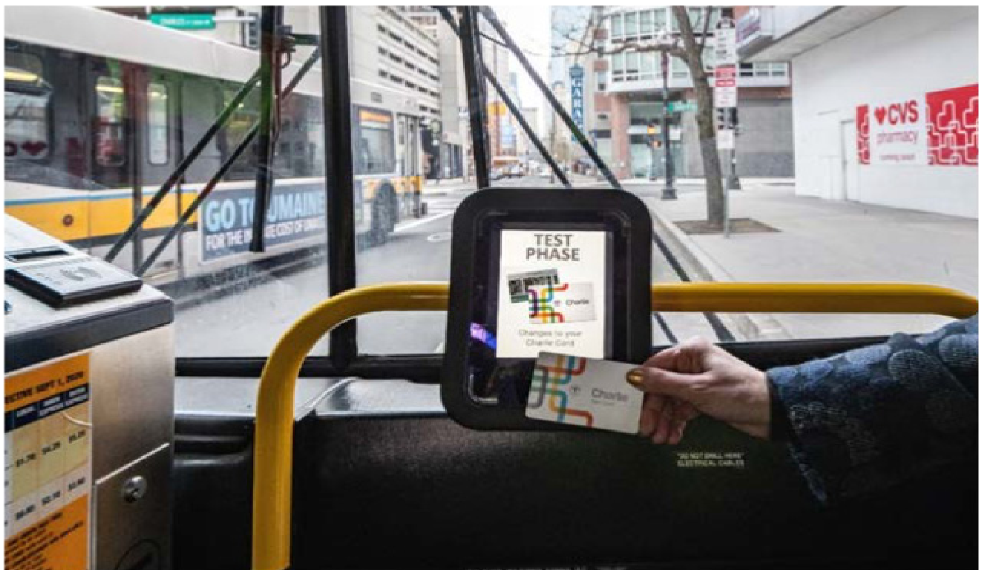
THE SHIFTING VALUE OF A T-PASS

In a future where employees will spend less time in the office, does a monthly MBTA pass still make sense? This is a simple question with profound implications. If benefits administrators decide the value of a monthly transit pass is no longer worth the cost, the ramifications could be severe, in particular for Commuter Rail riders. As our August/ September 2020 commuter survey results showed, Commuter Rail riders had two alternatives only: work remotely or drive.

One HR representative we interviewed recounted a personal commute story of particular relevance. They had a company-paid Commuter Rail pass but had to cover the monthly parking fee at the suburban station. At five days per week in the office, that made financial sense for both parties. Now that they plan to be in the office only two days per week, the pass loses value for their company and the parking fee is too expensive for them to justify. As companies look hard at commute benefits packages, a shift to flexible stipends and flat rates for all modes is one way to meet the varying needs of their workforce and avoid incentivizing driving.

Luckily there are innovative examples to cite, like the 2016 pilot MIT implemented in conjunction with the MBTA. MIT shifted all employee parking fees to be assessed daily, not monthly, which makes the cost of driving more salient. MIT also provided employees with a monthly LINK pass for unlimited MBTA bus and subway trips. The MBTA then billed MIT for *actual ridership* in a given month, not the typical flat rate per pass. Important to note here is that the daily parking fees were capped each month so that an employee would not pay more than the original monthly fee. Overall, four in five transit users billed less than (the full monthly pass cost) on any given month, meaning that the pay-per-use agreement helped MIT save a significant amount of money. If the institute were to have purchased LinkPasses for all active users, the cost would have been 72% higher.* Not only has this balanced risk for both the institute and the employee, this program enables employees to customize their commutes on a day-to-day basis without feeling pressured to fully utilize a monthly 'sunk cost'. This new, flexible approach has increased transit ridership among MIT's workforce while balancing cost for the institution.

FIGURE 6: TAPPING A TEST CARD ON MBTA BUS



SOURCE: MBTA

PERQ, which is the MBTA's corporate pass program, accounts for roughly one-third of annual fare revenue. Rapid development and deployment of additional options beyond the monthly fare products will be critical to public transit's value proposition moving forward.

In July 2020, the MBTA launched the 5-Day Flex-Pass for riders of the Commuter Rail. Available through the mTicket smartphone app, the pass included five single days of unlimited travel at a discounted rate of 10% off the regular fare. Current plans are to offer this pass until 90-days after the State of Emergency is lifted in the Commonwealth, which happened on June 15th.

***SOURCE:** Driving Change: How Workplace Benefits Can Nudge Solo Car Commuters Toward Sustainable Modes, By Adam Rosenfield (© 2018 Massachusetts Institute of Technology). Note that this paragraph has been updated to more accurately reflect the results of the MIT pilot.

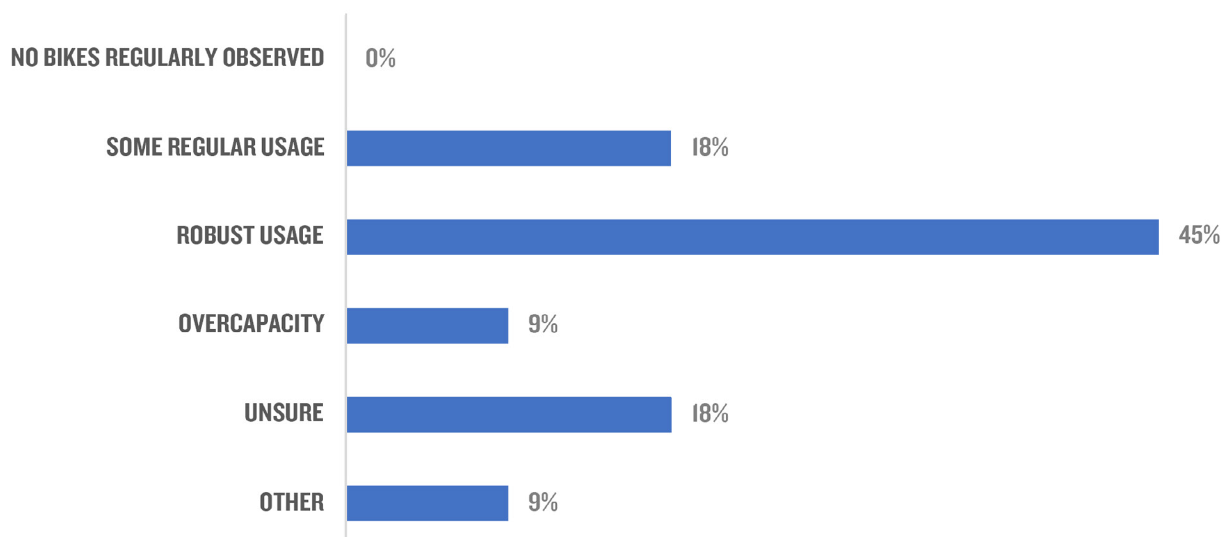
BRIDGING THE GAP WITH ACTIVE TRANSPORTATION

One of the brightest spots of the pandemic has been the 'Bike Boom,' a spike in the number of people riding bicycles. Some started riding as a way to stay fit in a socially distant way. Others chose the bicycle over the perceived risks of contracting COVID on public transportation. Bike shops have faced a surge in demand coupled with simultaneous supply constraints. Ridership on the public bikeshare system, BlueBikes, has exceeded pre-COVID levels and continues to rise. Suppressed levels of motor vehicle traffic and expansion of safe cycling infrastructure in the region have created an inviting environment and bicycling is thriving and poised for more growth.

In summer 2020, the City of Boston launched the Healthy Streets Initiative to focus on safe streets, connected bike routes, reliable transit, and resilient small business districts. The City expanded bus priority lanes on key corridors in four neighborhoods, enabling MBTA buses to run more quickly and reduce trip times and crowding for essential riders. The program installed pop-up bike lanes to enable more active transportation and has since made 6.5 miles of those lanes permanent. Healthy Streets expanded outdoor dining options as well as curbside pickup zones to help accommodate the increase in food delivery during the pandemic. All of these represent a rethink of what public space can be and how it can serve the public's interest. Phase two of this effort cemented – literally – many of these interventions into the hardscaped, separated physical infrastructure that is critical to a rider's perception of safety and comfort, and to enticing new people to ride.

Communities throughout the metro-region implemented similar initiatives and the safe cycling network continues to grow. Enabled by MassDOT's Shared Streets program, communities across the Commonwealth have implemented quick-build projects since summer 2020 and the program has been renewed in 2021. Offering grants of $5,000 to $500,000, the program prioritizes speed of implementation with a clear understanding of the imperative to take advantage of reduced pandemic roadway congestion.

FIGURE 7: REPORTED BICYCLE RACK USAGE



In our conversations, we learned the demand for bicycle parking has been strong, with 54% of organizations reporting their bike rack usage as 'robust' or 'overcapacity' (see Figure 7). As our 2020 commuter survey showed, the majority of respondents – a full two-thirds – live within ten miles of their workplace and 41% live within five miles. These are proven, viable distances to commute by bicycle, e-bike, or other forms of micromobility. In the same survey, bicycling emerged as the most attractive alternative mode for commuters (see Figure 8). Our conversations with employers uncovered similar strong interest and support for bicycling as well.

FIGURE 8: TOP NON-SOV ALTERNATIVES TO BUS AND SUBWAY (FROM AUGUST/ SEPTEMBER 2020 COMMUTER SURVEY)

NON-SOV ALTERNATIVES FOR:	BUS RIDERS	SUBWAY RIDERS
BIKE	8.5%	8.1%
WALK	5.4%	5.9%
TELEWORK	4.5%	4.1%
TOTAL	18.4%	18.1%

All news is not positive, however. Despite a sharp decline in vehicle traffic in 2020, roadway deaths remained static. In 2020, 327 people were killed in automobile crashes on Massachusetts roadways, compared to 324 in 2019. This is remarkable since there were 40,000 fewer crashes in total. Less congested roads have led to higher speeds and increased lethality when crashes occur. This is one more argument in support of the hardscaped, separated infrastructure for biking and walking that will protect vulnerable road users.

Boston Transportation Department recently released a Bicycle Level of Stress map that classifies every street in the city by its relative safety and friendliness for active modes. It is a tremendous resource to help prioritize improvements where they are most needed and to help coordinate with other construction and new development. It is first of its kind and a model for other cities to learn from.

CONCLUSION

COVID-19 has disrupted our lives and our economy in a way not seen in generations. It has also opened up new ways of thinking about how we work, why and how we move around the region, and the critical role our public spaces play in the health of our citizens and our economy. If we are to emerge from this pandemic stronger – to build back better - we all have a role to play.

Employers: To avoid a return of crippling congestion and related GhG emissions, employers should reconsider pandemic related parking subsidies. Further, they should implement balanced commuter benefits that promote cleaner commutes, flexibility, and choice. Salient parking rates and flat rate transportation stipends are two ways that reduce driving and promote transit use.

MBTA: The MBTA should pursue a targeted marketing and partnership strategy for employers, with a focus on tailored fare products that reflect a shift from traditional peak-based commutes to more flexible schedules. The T must actively court ridership through a robust public outreach campaign that highlights convenience and safety, and to ensure adequate service levels to accommodate commuters as they return.

Municipalities: In an effort to promote a vibrant recovery and encourage active and green mobility, Boston and other municipalities should accelerate the reconfiguration of roadways for the highest and best use of that public space. This includes expanding space for people to dine, to walk and bike, and to facilitate efficient and reliable public transit through bus priority lanes.

All of us: And we, the citizens of the region, have to remember that for two years in a row prior to the pandemic we had the worst congestion in the nation. Traffic was fraying our sanity, choking our most vulnerable communities, and threatening our economy. We can't go back to that.

Boston is known for rising above adversity and coming back stronger. As our state reopens, the collective decisions we make in the next few months will set the trajectory for the next few decades. Let us seize this opportunity.

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