ConnectGO

GETTING TO WORK FINAL REPORT

June 2021

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Executive Summary

The ConnectGO Getting to Work Survey is a collaboration between the Greater Omaha Chamber, Metropolitan Area Planning Agency (MAPA) and Verdis Group.

The survey asked employees across the metro area how they got to work before the pandemic, during the pandemic and how they would prefer to get to work in the future if provided a variety of programmatic interventions that support active commuting and working from home. Active commuting includes, but is not limited to, taking transit, bicycling, carpooling and walking.

Between November 2020 and June 2021, over 4,000 employees from over 20 organizations were surveyed via nine different surveys, representing an employee population of nearly 16,000 people in Omaha and Council Bluffs.

Overall results present an exciting opportunity: surveyed employers could shift 17% of pre-pandemic drive-alone trips to active commuting and working from home with supportive programming. Due to the COVID-19 pandemic and acceptance of a hybrid work from home culture, 9% of drive-alone trips could be avoided by working from home.

A major theme that emerged in survey responses is employees' desire for choices in how they commute throughout the week. Employees who actively commute to work may work from home for one day a week, ride transit another day and drive to work the day after that — depending on schedules, the weather, preferences and other factors. They may sometimes use multiple modes during one commute trip to work, such as taking a Heartland B-cycle to a bus stop, and walking the rest of the way. While reviewing survey results with employers, discussions repeatedly centered on how to support employees during the first and last miles of their trip, via a shuttle, bike rental system or walkable paths.

Transportation barriers are deterring job candidates from joining some of the surveyed organizations. Several organizations, including those with a number of vacant lower-wage positions, reported that potential job candidates have cited a lack of access to a car as a barrier. On average, surveyed employees working at an organization experiencing recruitment challenges reported they collectively knew 100 potential candidates who could not work at their organization due to a transportation barrier. These organizations have an opportunity to improve recruitment and retention by providing unique active commuting options such as vanpooling, shuttle programs and improved pedestrian pathways to their worksite.

By supporting the nearly 16,000 employees represented in the survey in getting to work in their preferred mode, employers could benefit our community in the following ways:

- **Reduce parking demand by 2,700 fewer parking stalls** needed in the Omaha-Council Bluffs metro area
- **Reduce traffic congestion on our roadways by nearly 5,400** fewer car trips each day
- **Improve air quality** through fewer vehicle tailpipe emissions
- **Eliminate over 5,000 tons of greenhouse gas emissions each year,** the equivalent of 611 homes' annual electricity use
- **Improve recruitment and retention of employees,** especially those for whom access to a car is a barrier to getting to work

Key Findings

Demand for work from home options from employees is higher than ever. Allowing employees to work from home could help these organizations avoid 9% of future drive-alone trips.

A wide variety of employers with differing work from home policies could, on average, offset 9% of future drive-alone trips by offering employees the option to work remotely. In the 2019 Close the Gap Report conducted by Verdis Group before the pandemic, only 5% of future drive-alone trips could be avoided due to working from home. [1] Of the surveyed employees who worked from home during the pandemic, 83% believe their employer should continue to support work from home practices.

There is demand for support of free transit passes provided by employers and access to transit routes.

If employers provide free bus passes to their employees, and if employees have access to a transit route, 5 percentage points of drive-alone trips could be replaced with transit trips. The use of Omaha's Bus Rapid Transit—known as ORBT—could offset 2 percentage points of this 5. Access to a transit route near their home or worksite was listed as a barrier to using this transportation mode for 19% of participants.

Biking demand doubled when employees were presented with options, including free Heartland B-cycle passes and appropriate infrastructure.

Potential future trips using a bicycle could increase from 1% to 2% of total trips. Of the employees interested in bicycling to work, 65% would like to do so one to two days per week, an example of the need for a suite of options allowing commuters to choose which modes work best for them on any given day.

Employers play a key role in supporting active commuting.

When asked about the importance of their employer supporting active commuting, 43% of employees surveyed believe it is important or very important, while 34% of employees neither agree nor disagree. Creating active commuting programs will be popular with employees.

When marketing active commuting programs, employers should focus on saving money, getting exercise and helping the environment.

These were the top benefits listed most often by active commuters. The American Heart Association recommends five 30-minute sessions of moderate physical activity per week. [2]

AAA estimates that the cost of owning a car is $9,500 annually, [3] and passenger vehicles and light-duty trucks account for the majority (52%) of all U.S. transportation-related emissions, according to the Environmental Protection Agency. [4]

Transit is a barrier to recruiting employees.

At organizations where multiple job positions remain open, some potential candidates' limited ability to get to work in a car creates a barrier to accessing the worksite. On average, employees at these organizations report they collectively know 100 potential recruits for whom transportation to their worksite is a present barrier.

[1] Daniel Lawse, Craig Moody, Grace Thomas, "Close the Gap: Connecting Talent to Work through Mobility Choices in the Metro Area," Heartland 2050, 2019

[2] "Recommendations for Physical Activity Infographic," American Heart Association, accessed June 22, 2021

[3] Andrew Sheldon, "It Now Costs More Than Ever to Own a Car," *YourAAA Daily*, December 23, 2020

[4] "Facts Facts: U.S. Transportation Sector Greenhouse Gas Emissions (1990–2019)," Environmental Protection Agency, June 2021

Who Took the Survey

From November 2020 to June 2021, over 4,000 (4,099) Omaha metro area employees took the ConnectGO Getting to Work Survey, representing almost 16,000 (15,857) employees at more than 20 organizations.

Nine surveys were distributed over this time period; two collaborative surveys included multiple organizations, while every other survey was distributed only to a single organization. Industries represented in this sample include but are not limited to healthcare, manufacturing, nonprofits, municipalities, business districts and entertainment.

Two organizations surveyed had locations in Council Bluffs, one was solely based in Council Bluffs, and the remaining organizations were located in Omaha. Surveys were distributed primarily via email but, based on the organization, other options included Spanish translations and printed surveys. Across all surveys, the total response rate was 26%. The average response rate of each organization was 31%.

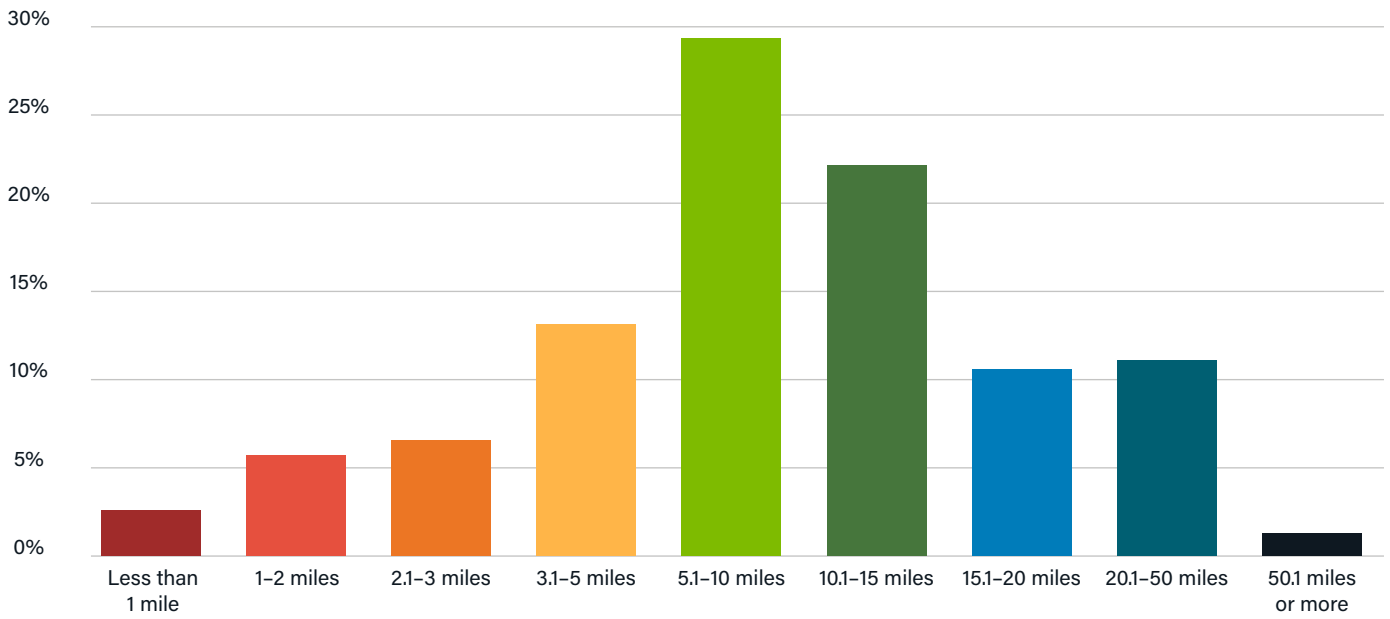
The average one-way length for a trip to work for a given respondent was 12.3 miles. Of the surveyed employees, 8% live within two miles of their worksite—making them great candidates for bicycling or walking to work—while 27% of employees surveyed live within five miles of their worksite, making them great candidates for using transit.

Out of the employees surveyed, 55% live within 10 miles of their worksite, which is lower than the Omaha-Council Bluffs metro average of 65%, indicating our sample size lives further from work than the average metro employee. [5]

All participants were asked to provide age and gender information in order to ensure that a representative sample was collected from each organization. The results showed that 63% of participants identified as female, which is likely due to the presence of two healthcare organizations with female-dominated fields.

For a detailed map of the breakdown of starting zip codes for employees, please see Appendix Figure 2.

Miles to Work One Way



[5] U.S. Census Bureau, OnTheMap Application and LEHD Origin-Destination Employment Statistics (Beginning of Quarter Employment, 2nd Quarter of 2002-2018)

Methodology & Survey Results

All participants were asked to describe what their commute looked like in a seven-day week, in three different scenarios:

1. At the time of the survey
2. Prior to the COVID-19 pandemic (if it was different), and
3. What they would prefer their commute look like, either
   a. After the pandemic, or
   b. During the pandemic, depending on comfort

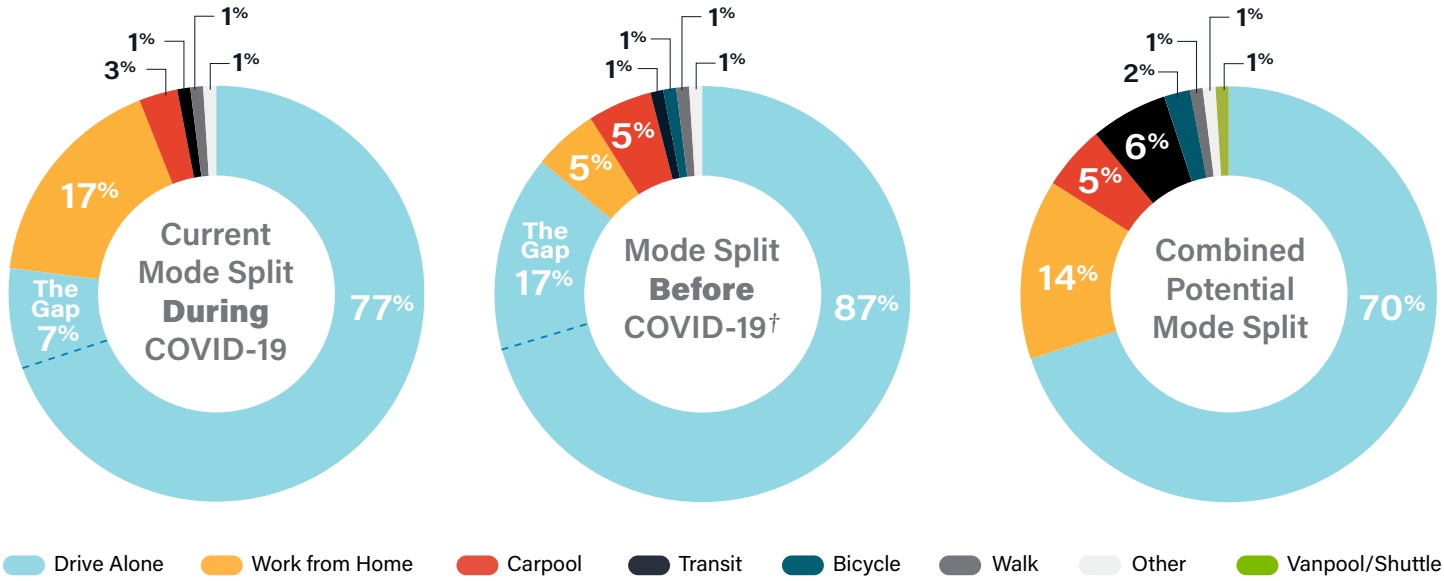
In this survey, active commuting is defined as:

- Carpooling with someone at your worksite
- Carpooling with someone from a different worksite
- Riding the bus
- Driving to a park-and-ride to ride the bus
- Riding a bicycle
- Riding a Heartland B-cycle
- Walking
- Taking a taxi
- Driving a motorcycle or scooter
- Vanpooling
- Taking a shuttle

These options were offered in addition to driving alone to work and working from home. Support programs for active commuting varied with each employer but generally included programs such as a carpool matching program, free transit passes and an emergency ride home program. The survey was reviewed with each employer before distribution to determine what support programs might be viable at their specific organization. For that reason, some employers offered a vanpooling option, whereas others offered discounted Heartland B-cycle passes.

Compared to pre-pandemic trips, future drive-alone trips could decrease by 17 percentage points (The Gap) if employers supported employees' preferred commute methods, including active commuting and working from home. There is a 7 percentage point potential decrease in drive-alone trips in favor of active commuting trips from the time of the survey to future trips, in large part because so many employees were working from home due to the pandemic. (At the time of the survey, 17% of drive-alone trips were avoided by working from home.)

The Gap represents the potential percentage difference in Drive Alone trips between the Pre-COVID-19 Mode Split and the Combined Potential Mode Split.



† *The data has been rounded to the nearest percent.*

Methodology & Survey Results

Pre-Pandemic Commuting Trends vs. Potential Mode Split

The 17 percentage point difference in pre-pandemic drive-alone trips to potential future drive-alone trips comes in large part from a 9 percentage point increase in working from home. Due to the COVID-19 pandemic, organizations across the metro have adapted to allow non-essential employees to work from home. Many of the organizations surveyed have embraced working from home and are considering or planning to offer this option to their employees in some capacity post-pandemic.

Transit could offset 5 percentage points of drive-alone trips, making it the second-largest opportunity to shift to active commuting. All surveys propose that transit passes would be at no cost to the employee. In some cases, a map of the approximate bus route was provided to employees.

At applicable locations, using ORBT was offered as a separate option to best understand both current and potential ridership. ORBT launched in November 2020, so for locations with ORBT access, information was provided about the route. **Of the 5 percentage point increase in potential future trips made by transit, 2 percentage points are from ORBT** — a potential 450 additional trips each week from the represented employees.

Carpooling was likely less popular (3% of trips) at the time of the survey due to pandemic concerns or typical carpool partners working from home temporarily. A larger percentage of trips could be made by carpooling in the future, but not more than the percentage before the pandemic (5% of trips). Two options were offered to survey takers: use a carpool matching program at work to find a partner or carpool with an individual not at their organization. One employer offered the option of preferred carpool parking. A carpool matching program would account for 3% of future carpooling trips (out of 5% in total), which is free to employers in the Omaha-Council Bluffs metro area.

Finally, **2% of potential future trips could be made riding a bicycle, a 1 percentage point increase from before the pandemic.** Applicable locations that offered free Heartland B-cycle passes make up a potential 0.3% of these potential future trips. Of the employees interested in riding a bicycle in the future (including Heartland B-cycle), 65% are only interested in riding one to two days a week, which demonstrates an interest in combining bicycle commuting with other forms of commuting on different days of the week.

Read more about the impact of working from home on page 10.

Methodology & Survey Results

Impacts from Realizing the Potential

If employers support their employees in commuting to work in the way that they prefer, there could be major impacts for the Omaha-Council Bluffs metro area. Realizing the 17% gap in pre-pandemic to future active commuting trips and working from home at just the organizations surveyed would result in 5,390 fewer one-way trips to worksites each day.

Around 2,700 parking stalls could be avoided each day, **with a cumulative parking savings of $3.8 million based on the cost to build and maintain a surface lot parking stall in the metro area.** (The cost for a parking garage stall can be up to twice as much.) Almost 571,000 gallons of gasoline could be avoided each year, which is equivalent to the electricity use of 922 homes in one year.

Not only would reducing drive-alone trips decrease pollution, reduce traffic and congestion and provide savings to the employer by utilizing less parking, but it would also benefit employees. **At the standard mileage reimbursement rate in 2020, the total employee survey population could save over $8.3 million dollars per year.** When the disposable income of metro-area employees is increased by this amount, there is great potential for a substantial boost to our local economy.

Expanding transportation options and subsidizing active commuting methods (for example, the way driving is subsidized via free parking) can not only help retain employees but attract future employees for whom transportation is a barrier. At three organizations, employees were asked how many people they knew that would be interested in working at their organization if transportation were not a barrier. On average, employees surveyed collectively reported knowing 100 potential candidates who could not work at their organization due to a transportation barrier.

Realizing the potential would result in

5,390 fewer one-way trips to worksites every day:

Almost 571,000 gallons of gas could be avoided each year

Around 2,700 parking stalls could be avoided each day

The total employee survey population could save $8.3 million each year at the 2020 standard mileage reiumbursement rate

Methodology & Survey Results

Vanpool, Shuttle & Transit + Shuttle

Three organizations are located in industrial areas of the metro with transit access typically located half to one mile away from their worksite. These employers have retention and recruitment challenges and offered the following unique commuting support programs.

Vanpooling. Described to survey takers as a program in which four to 10 employees share a rented van for a weekly fee of $10-$15 per person.

Shuttle Program. Inspired by Iowa's IDOT shuttle program, an option was offered in some cases to take a shuttle from a key pickup location to the employee's worksite for a trip fee of $2-$5 per trip.

Shuttle Program from Transit Stop. In cases where the transit stop is far away from the worksite, employers offered free transit passes, as well as a shuttle from the bus stop to the worksite.

Vanpooling was the most popular of these three options at locations where it was offered. There is exciting potential for vanpooling — not only because there is interest at each unique location but, in some cases, there may be opportunities for multiple employers to partner together to coordinate these programs.

Some employers may pilot a program by allowing employees to self-organize either using a manual sign-up program or via an employee portal. Once employees form a vanpooling group, it is the employee's responsibility and liability to safely operate the van each week.

Commuting Barriers, Benefits & Support

Support for active transportation

Respondents were asked how important it was to them that their employer supports active commuting. When asked about the importance of their employer supporting different types of commuting, 43% of employees surveyed believe it is very or somewhat important, while 34% of employees believe it is neither important nor unimportant.

How important is it to you that your employer supports active commuting? †

† The data has been rounded to the nearest percent.

Barriers to active commuting

At almost every organization surveyed, the most common barriers to active commuting include distance, time needed to use a different mode and concerns about getting around in case of an emergency. These results emphasize that active commuting will not work for everyone (for example, those who live too far away from their worksite). However, employer-provided programming, such as an emergency ride home program, can address some of these concerns.

Some of these barriers, like sidewalks, bicycle lanes and transit service close to work and home, require infrastructure investment from our community. There are also low-cost or cost-free ways to address these barriers, including educating employees about where bus routes run in proximity to their home or worksite. Additionally, employers in the metro can use a no-cost online portal for their employees to identify potential carpool matches that align with their commute.

Participants listed the following as their barriers to active commuting:

19%

Not knowing someone with the same schedule as me to carpool with

19%

Lack of bus service near my home and work

17%

Lack of sufficient sidewalks, bicycle lanes or paths on my route

Benefits of active commuting

When asked why employees actively commute, those who do so listed financial savings as the top benefit. Of those surveyed, 14% of employees listed this as a benefit, a small percentage because 72% of employees do not actively commute.

Other popular benefits include exercise and health benefits (13%) and helping the environment (11%).

Participants listed the following as their top three benefits from active commuting:

14%

Save money

13%

Get exercise, health benefits

11%

Help the environment

Work from Home Findings

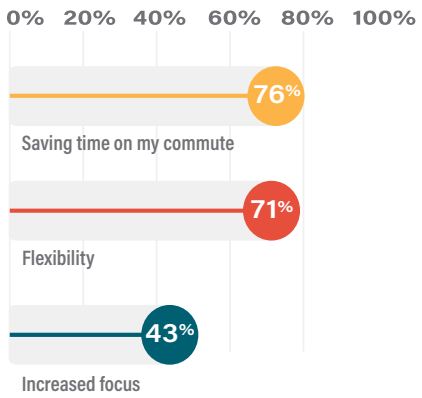
Of the nine surveys, seven asked employees about their experience working from home during the pandemic. Two organizations opted not to ask employees about their work from home experience, typically because their employees cannot work from home in the future or because the majority of employees are considered essential workers who cannot work from home.

Overall, **38% of employees surveyed worked from home at some point during the pandemic.**

Employers who opted not to ask employees about working from home were all factored into this percentage as having not worked from home during the pandemic. Respondents who reported working from home at some point during the pandemic were asked a series of questions about their experience.

Of the respondents who worked from home during the pandemic, 78% were very satisfied or satisfied with their experience.

Participants listed the following as the top three benefits of working from home:



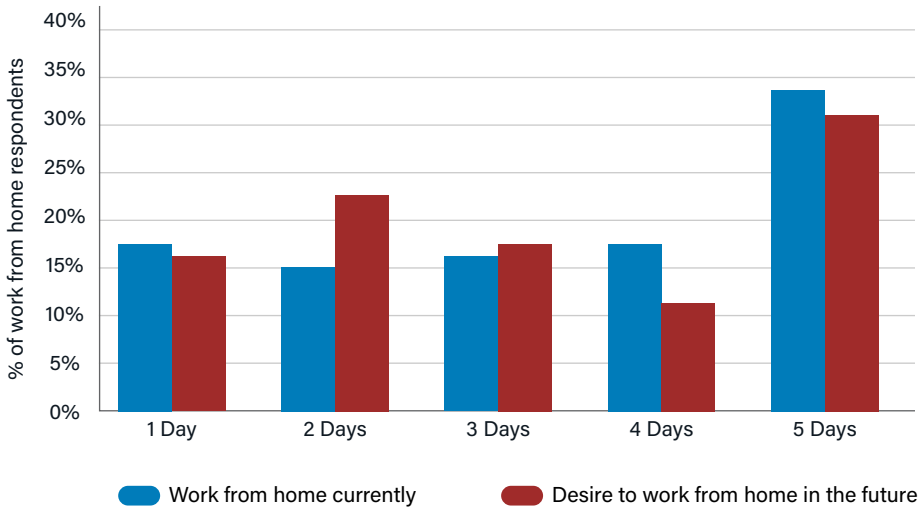
Participants listed the following as their top three barriers to a successful work from home experience:

Can you excel at your job while working from home?

How satisfied are you with your work from home experience?

At the time of the survey, 17% of total drive-alone trips across all organizations surveyed were eliminated by working from home. Only 5% of trips were avoided by working from home prior to the COVID-19 pandemic, a 12 percentage point difference from the time of the survey completed during the COVID-19 pandemic. When asked about commuting in the future, 14% of drive-alone trips could be avoided if employers continue to support the practice with guidelines, a 9 percentage point increase from before the pandemic.

Current vs. desire to work from home



The potential decrease in trips due to working from home, from the time of the survey to the future, represents an interest in a hybrid work from home scenario, with some time in the office and some time working from home. When asked how many days per week respondents would prefer to work from home, the most popular response was to continue working from home full-time or five days per week (31%). **However, preferences for working from home two or three times per week increased by 10 percentage points, reflecting an interest in a hybrid work from home scenario.**

Employees cite the opportunity to avoid 9% of potential future drive-alone trips by working from home. Extrapolated to the total survey representation of almost 16,000 employees, this could mean a savings of over 1,400 parking stalls each work day, equivalent to about four and a half average city blocks, and 2,800 one-way trips to work and back each day. **The parking costs alone could save the metro over $2 million in expenses, based on the average cost to own and maintain a parking stall.** Each year, over 300,000 gallons of gas could be avoided if 9% of employees' drive-alone trips were offset by working from home.

Should your employer allow employees to work from home? †

† The data has been rounded to the nearest percent.

COVID-19 Pandemic Impact

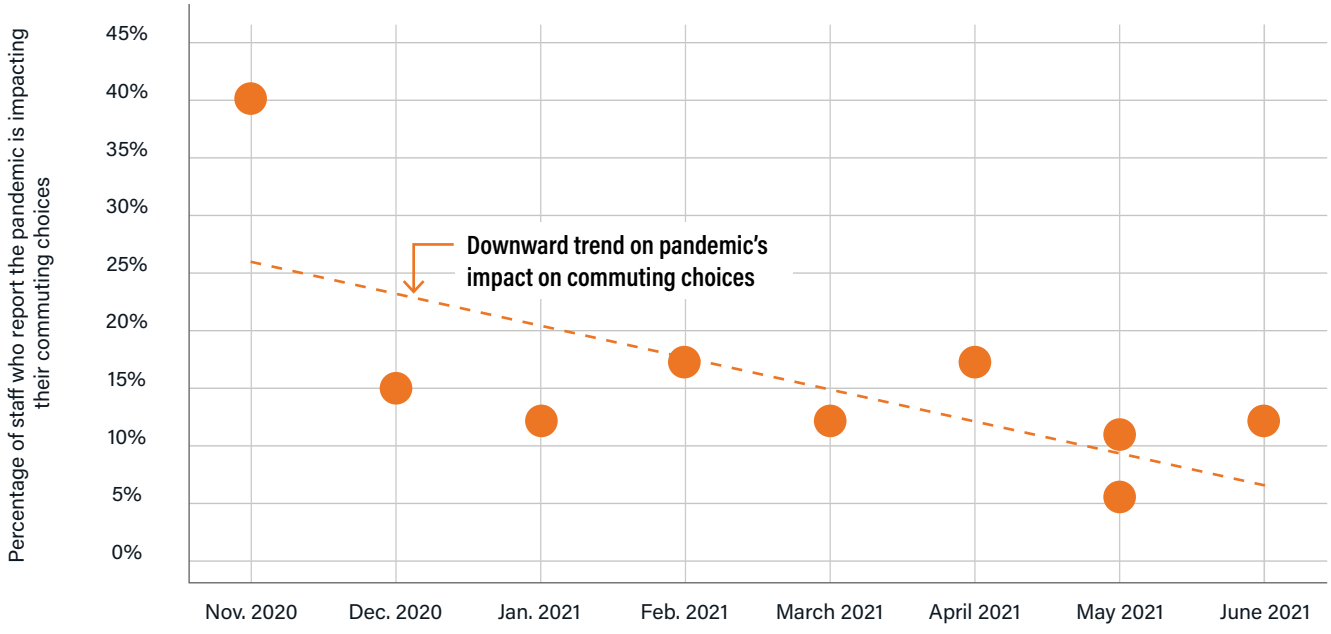
At the time of the first ConnectGO Getting to Work Survey (November 2020), the COVID-19 pandemic was at its height in Omaha, Nebraska, with 987 hospitalizations due to COVID-19 on Nov. 20, 2020, according to the Nebraska Department of Health and Human Services. [6] (Please note this does not include Council Bluffs but, due to the close geographic proximity to Omaha, it can be assumed that trends were similar.)

When the first survey was distributed, 63% of employees at that organization said their commute was different prior to the COVID-19 pandemic. As time continued on, it is possible that some employees who responded that their commute was different before the pandemic did so because they were at a different location or had a different employment status, not necessarily that their commuting patterns changed because of the pandemic.

Respondents were also asked to report if the pandemic was impacting their comfort with or ability to use active commuting. **In the graph below, you can see that as time continues on, fewer employees report the pandemic is impacting their comfort level.** In the first survey, 40% of employees reported that they were uncomfortable considering these options given the pandemic, compared to the final survey in which 13% of employees reported the same.

It should also be noted that the type of organization likely influenced this metric; employees who were essential service workers may have been more likely to consider active commuting given their vaccination status or a variety of other factors.

COVID-19 Impact on Commuting Choices



[6] "Daily Active Hospitalizations," Nebraska COVID-19 Dashboard, Nebraska Department of Health and Human Services, accessed June 22, 2021

Council Bluffs Analysis

Three organizations with five locations in Council Bluffs were surveyed in the healthcare, manufacturing and entertainment industries. In total, 430 employees who work in Council Bluffs responded to the survey, representing a total of 1,963 employees aggregated at all five locations, a 22% response rate over all three employers.

Active commuting data at the time of the survey, as well as potential commuting modes both during and after the pandemic, have been aggregated across all five locations. **At the time of each respective survey, 89% of employees commuted to work by driving alone in a car. The most popular form of active commuting was carpooling**, with 7% of trips being made by carpooling with someone at the same location (4%) or by being dropped off by a carpool partner at a different location (3%).

If provided a variety of supporting elements, as many as 9% of drive-alone trips made by employees in Council Bluffs could be avoided in the future. The largest potential decrease (5 percentage points) in drive-alone trips comes from an increase in carpooling. One-third of these potential carpool trips could be made by vanpooling, offered as an option at four of the five worksites. Vanpooling involves four to 10 employees sharing a rented van for a weekly fare of $10-$15 per person. Several of these locations, even with different employers, could participate in a shared vanpooling program to increase potential use. Two percentage points of trips could be made via carpooling if employees have access to a carpool matching program.

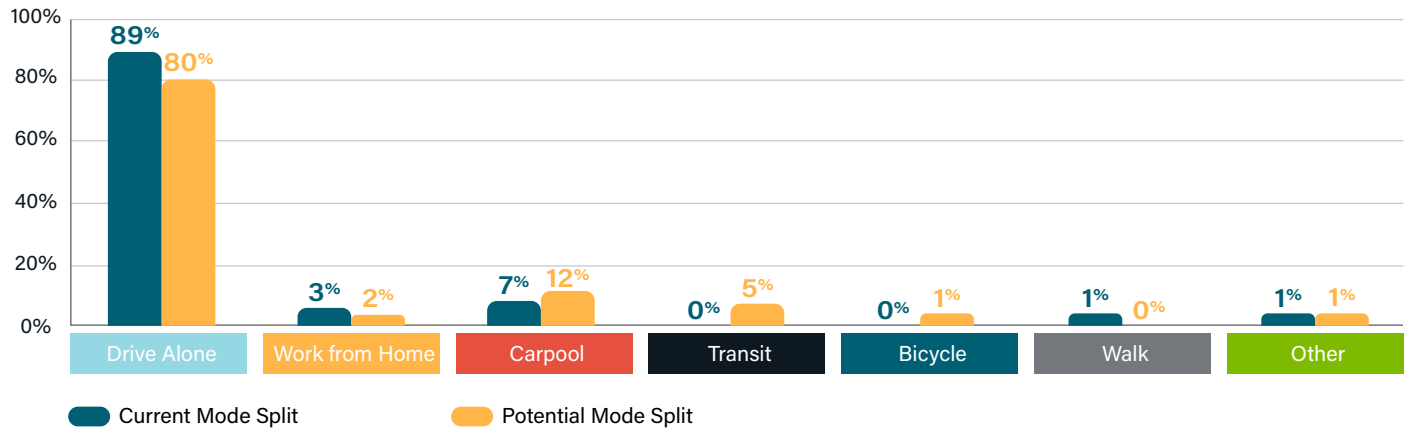
Employers have access to a no-cost portal to assist their employees in carpool matching via the Iowa Department of Transportation.

Transit trips (which, in this case, includes metro transit and employer-sponsored shuttle services) could potentially increase by 4 percentage points with a variety of supporting programs. At four of the five locations (representing 78% of survey takers), an option to pay a shuttle trip fee of $2-$5 was offered, which could offset as many as 2% of drive-alone trips. Of those who are interested in a shuttle program to work, the majority (a total of 27 interested survey takers) at the four locations surveyed were most interested in a pickup from Broadway in Council Bluffs. These findings provide a case for a shuttle program pickup on Broadway, even between different employers at different locations. Metro Transit accounts for the other 2% — a gap that could be filled by providing a no-cost bus pass to employees.

Of Council Bluffs employees surveyed, only 10% report that their commute was different prior to the COVID-19 pandemic, compared to 23% of total survey respondents. This is likely because most of the employees surveyed in Council Bluffs are essential workers who continued to commute to work despite the pandemic.

All survey respondents were asked how important it is to them that their employer supports active commuting. This topic was very or somewhat important to 42% of Council Bluffs employees — an identical rate as the overall survey population.

Current Mode Split vs. Potential Mode Split in Council Bluffs



APPENDIX

Figure 1

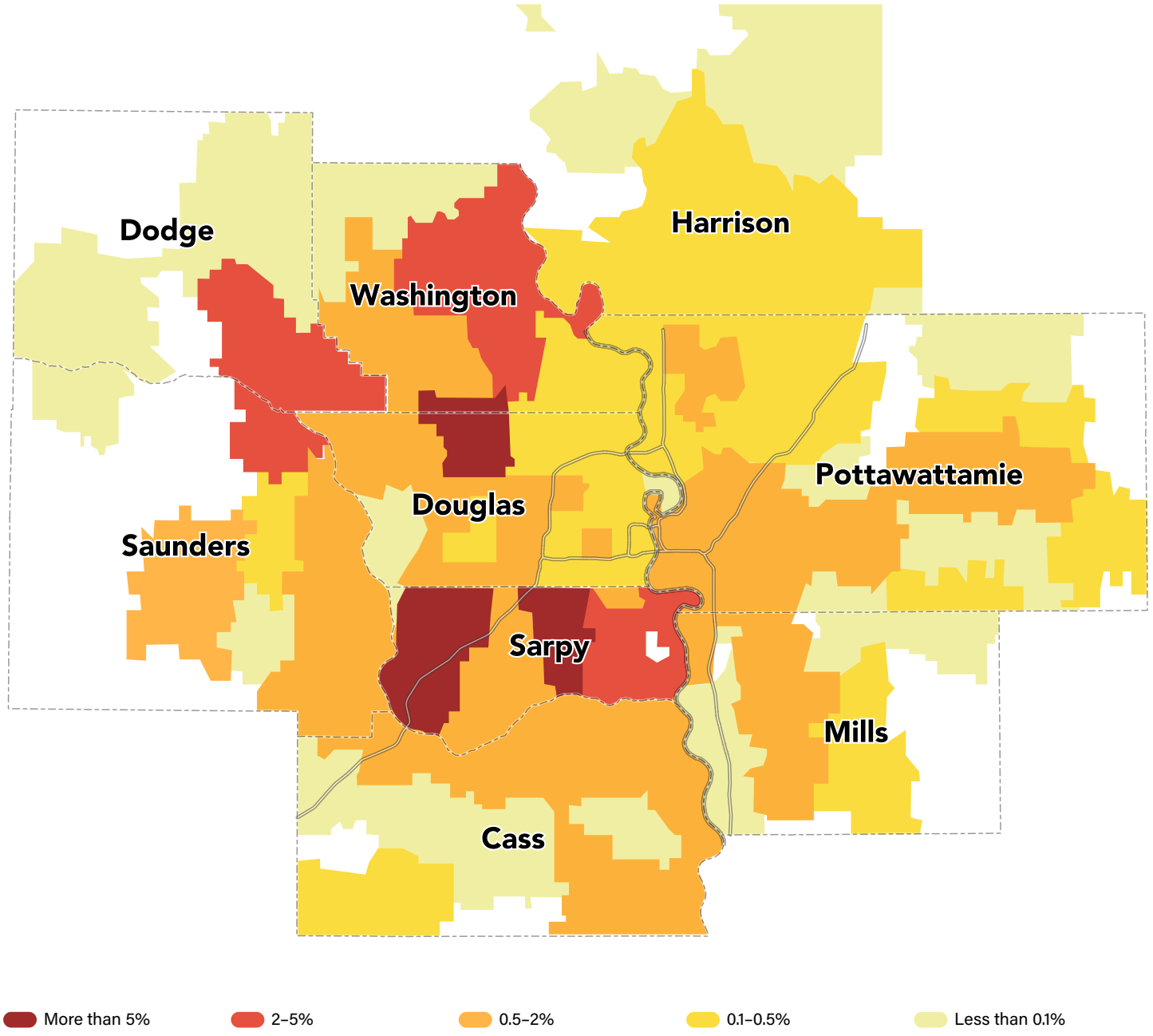
	Current Mode Split During COVID-19	Mode Split Before COVID-19†	Combined Potential Mode Split
Drive Alone	77%	87%	70%
The Gap	7%	17%	-
Work from Home	17%	5%	14%
Carpool	3%	5%	5%
Transit	1%	1%	6%
Bicycle	0%	1%	2%
Walk	1%	1%	1%
Other	1%	1%	1%
Vanpool/ Shuttle	-	-	1%

† The data has been rounded to the nearest percent.

Raw data has been provided to reflect the information provided in the graphs on page 5. Some columns may not add up to 100% due to rounding.

Figure 2

Heat map representing the zip codes employees commuted from to get to work.



The project was funded by the US Department of Transportation, Federal Highway Administration, the Iowa West Foundation and the Nebraska Environmental Trust

U.S.Department of Transportation
Federal Highway Administration

IOWA WEST FOUNDATION

The Nebraska Environmental Trust