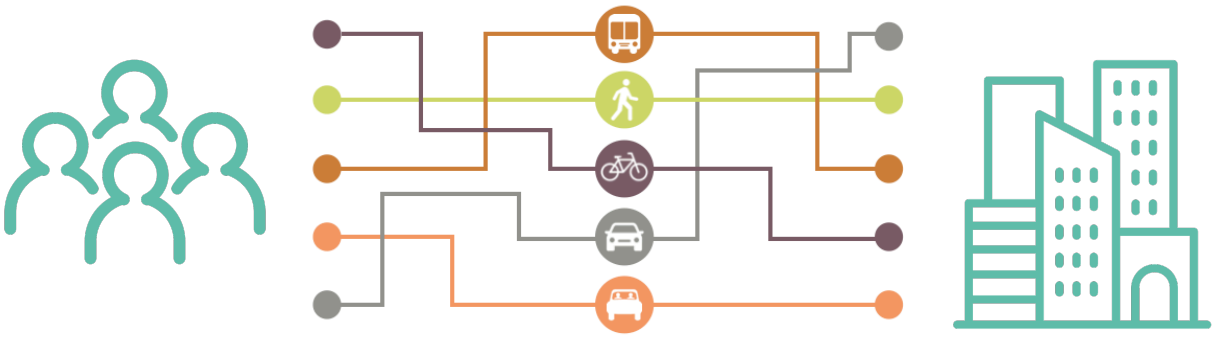
Close the Gap: Connecting Talent to Work through Mobility Choices in the Metro Area



Heartland 2050

CLOSE THE gap

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Executive Summary

Do you know how your employees get to work? Do you know how they would prefer to get to work?

A dominant narrative in the metro area is that everyone drives a car to work because there is no interest in and no way to actively commute. Eleven local employers were surveyed representing more than 57,000 employees and students to establish the current mode split, and seven of those institutions looked further, asking employees about how they would prefer to commute. The data shows a gap between the perceived notion about commuting, the idea everyone wants to drive a car to work alone, and actual notions about commuting, that people are interested in actively commuting but need structures and programs that both remove barriers and encourage them to do so.

In a city facing the realities of a rising population, brain drain, and competition in an international economy, the list of reasons why active transportation is important is anything but short.[1,2,3] Companies regularly spend hundreds of thousands of dollars each year subsidizing the hidden benefit of parking and road infrastructure for their employees.[4] Walking, bicycling, taking public transit, and sharing rides to work reduce pollution and keep our air clean. At its core, transportation is about connecting people to what matters most to them. The following data demonstrate an exciting opportunity for metro area organizations to empower employees to make transportation choices that are right for them while attracting top talent.

[1] Omaha, Nebraska Population 2018. World Population Review.
[2] Ruggles, Rick. 2018. Nebraska's brain drain problem: Why do young, educated workers leave the state? Omaha World Herald.
[3] Staff Reporters. 2018. Omaha not among the 20 cities Amazon is eyeing for second headquarters. Omaha World Herald.
[4] Cowen, Tyler. 2010. Free Parking Comes at a Price. The New York Times.

Survey Overview

From 2014-2018, Verdis Group administered eleven surveys to employers from across the metro area (Figure 1). This includes five educational institutions and four healthcare and public institutions. The majority of institutions surveyed are located in downtown, midtown, and along the Dodge St. corridor, a major east-west transportation corridor. These locations have access to transit lines and have more pedestrian infrastructure than other locations in Omaha.

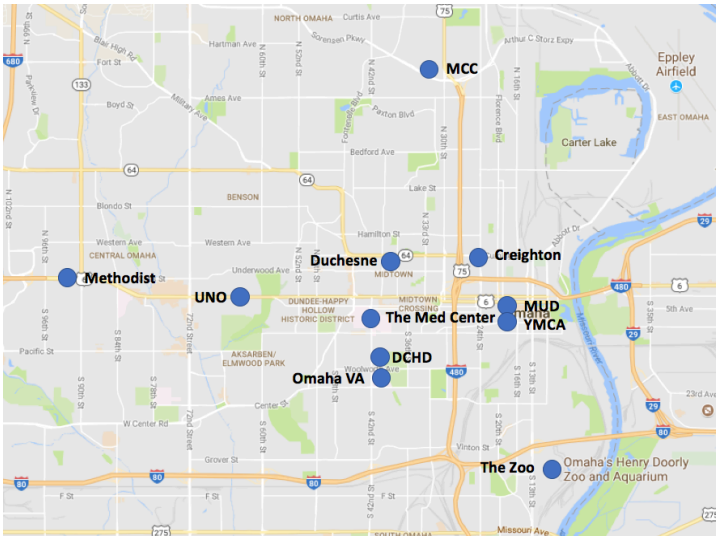

Figure 1: Dispersal of surveyed businesses in the Omaha Council Bluffs Metro area.

Over the course of four years, Verdis Group collected over 12,000 survey responses from these eleven institutions. With an overall response rate of just over 20%, this survey represents 57,000 total employees and students from across the metro area. Ages of respondents ranged from 14 years old to 65 and older, and about 50% of survey respondents were between ages 18 and 34. The data represent more women than men (67% of respondents were female), which can be attributed to the number of healthcare institutions and educational institutions surveyed, which are female-dominated fields.[5]

Respondents report that they, on average, make 10.7 one way trips (all trips referred to in this document represent one way trips) to work per week. Most go to work between 5 and 6 days a week. This survey encompasses over 30 million one-way trips from 57,000 employees and students going to and from work per year, and 14.7% of the metro's working and educational 2013-15 Metro Statistical Area population.

[5] Elkins, Kathleen. 2015. 20 jobs that are dominated by women. Business Insider.

How Surveyed Respondents Commute, and How Responses Compare to Census Data

Currently, 24% of trips recorded are made by actively commuting (See Figure 1). Broken down, 8% report that they carpool, 6% walk, 5% of trips avoided each week were by individuals able to work or study from home, fewer than 1% rode the bus, fewer than 1% bicycled, and 3% commuted by other means. The “other” section includes the mode of shuttle, which was popular on some college campuses, and motorcycle.

It is important to note that the percentage of surveyed individuals driving alone on their commute (76%) is lower than the Census reports for the Omaha Council Bluffs Metro Statistical Area (84%). This could be attributed to the importance of the location of a work place; almost all locations surveyed were in Omaha’s city center close to other major employers, transit routes and many in walkable locations. With the knowledge that surveyed employers were located in the city center, the population surveyed represents a comparable group to census data that can help confirm the validity of survey data collected. Furthermore, potential can be seen especially in the transit section, where metro area respondents and census respondents fall far under the national average.

These results debunk the myth that everyone in the metro area drives alone to work. In fact, one in four use other methods to get to work. These results establish that there is already a group of metro employees, a strong group, that is getting to work without driving alone each day.

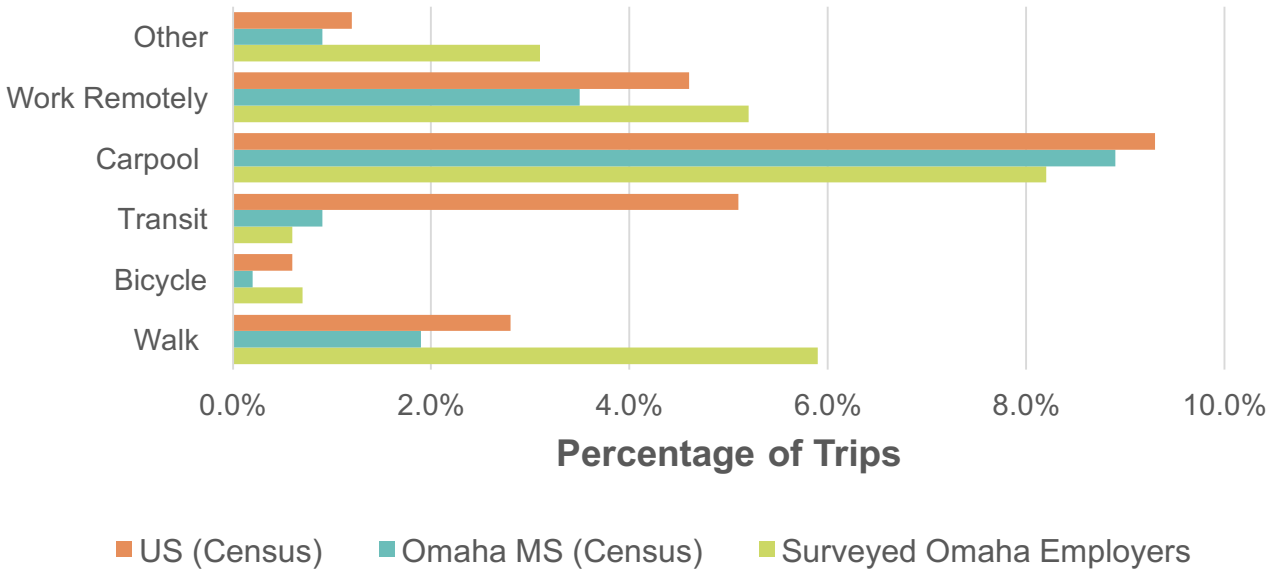

Figure 2: Percentage of trips taken by each mode from organizations surveyed, compared to the MSA for Omaha and the US in the 2013-15 census. See the appendix for raw data.

Breaking down the Metro Area

The survey data is comprised of results from residents that live in over thirty ZIP codes in the metro area. The most popular zip codes included 68131 (midtown along the Dodge street corridor) and 68102 (near Creighton, downtown and old market). The popularity in these zip codes again emphasizes why active commuting was more popular in this survey than in census data due to access to a strong transit corridor with walkable neighborhoods. These locations represent urban populations rather than suburban ones.

Figure 3 shows the breakdown of transportation modes for ZIP codes in the metro area from 2011-2016 five-year Census estimates. The map confirms that location matters; the denser urban locations with walkable development and neighborhoods have a higher percentage of residents who actively commute. Overall, there is a common myth that everyone drives alone in the metro when this map provides evidence that location matters for both employers and employees.

Case Study – *University of Nebraska at Omaha*

UNO implemented their active commuting program called MavRide in 2011. Students, faculty and staff are given a MavCARD that works as their transit pass, allowing them to take Metro Transit to and from campus. The program also includes bicycle parking, carpool permits, an emergency ride home program and ride matching for those interested in carpooling.

Transit ridership has increased 162% since the program began in its first year. In 2017, 124,000 rides were taken by UNO staff and students, a large increase from the 50,000 rides taken in 2012.

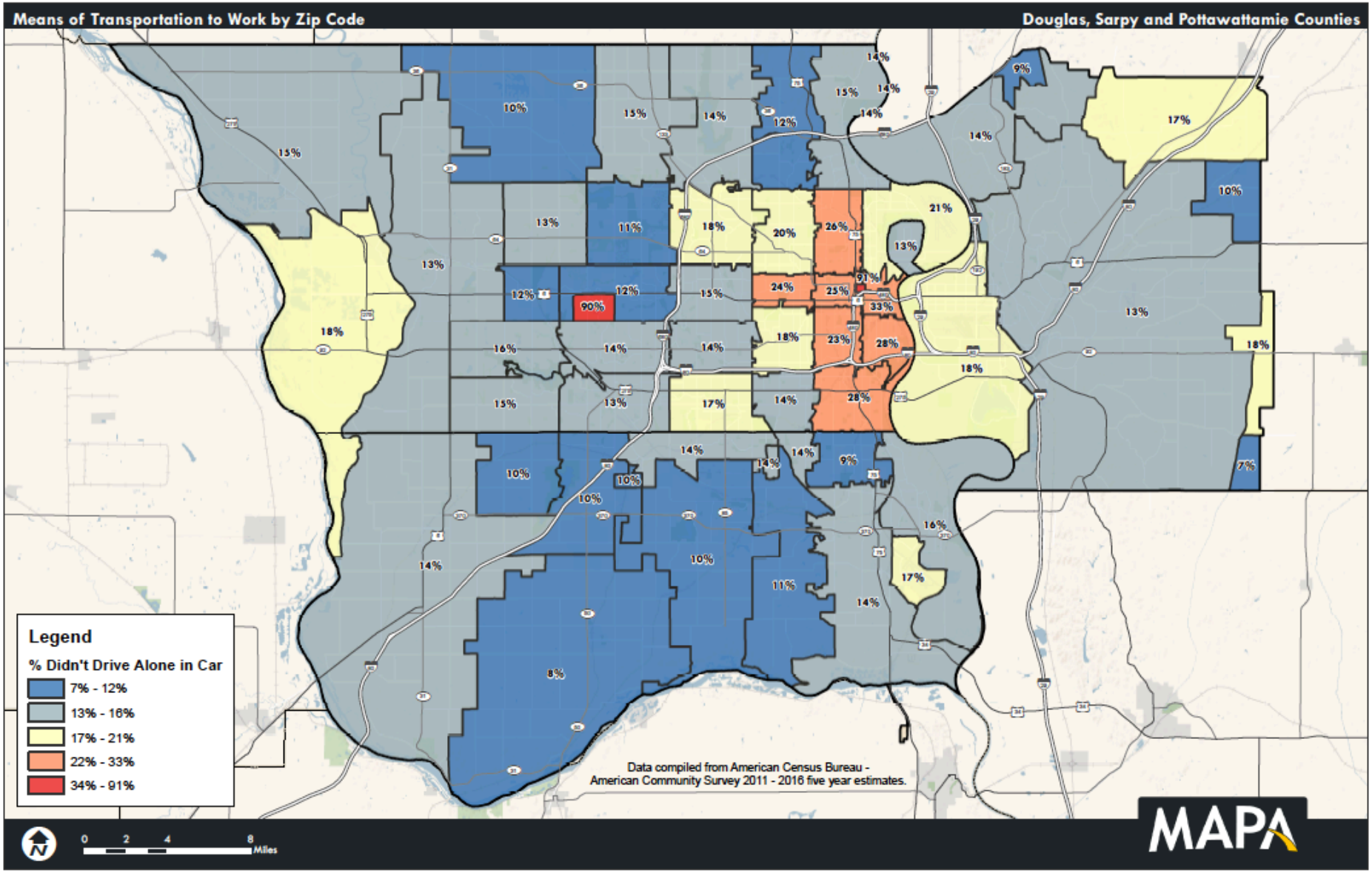

Figure 3: Means of transportation to work by ZIP code in the metro area. The two zip codes with over 90% represent Boys Town where the majority of residents are under 20 years old, and Creighton University where the majority of students walk to work or class.

Identifying the Gap

Of the eleven employers surveyed, seven collected data on both the current mode split at their organization *and* the potential mode split. Participants were asked, if provided support systems such as subsidized transit passes, emergency rides home, and bicycle storage, would they commute to work the majority of time by an active mode of transportation. Overall, raw data was collected from a subset of seven employers and 7,000 individuals representing a population of over 25,000 individuals.

Based on survey results, 18% of current one-way drive-alone car trips may be avoided by strategically deploying support programs at places of work in the metro area (Table 2). Extrapolated to the entire employee population of all eleven organizations surveyed, this reduces 2.2 million one way trips each year. On average, the population surveyed commutes 9.6 miles to work one way. By offsetting 18% of trips, 1.7 million gallons of gasoline would be saved each year. Offsetting 18% of trips would avoid over 6,000 car trips on the road each day, and over 3,000 parking stalls not needed each day.

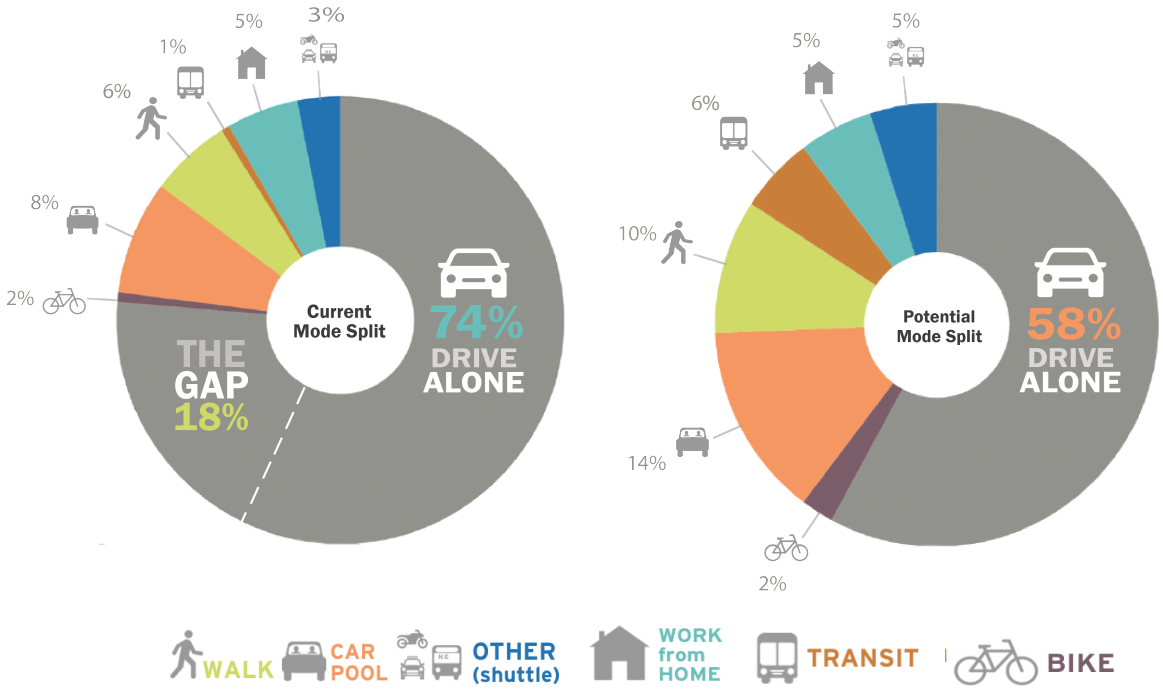

Figure 4: Difference between current and potential mode splits from survey data.

	Original %	Potential %	Difference in Number of Trips Per Year from all Represented Employees/Students
Drive Alone	76.3%	57.9%	- 374,000
Carpool	8.2%	14.1%	+ 121,000
Walk	5.9%	9.8%	+ 79,000
Transit	0.6%	5.5%	+ 100,000
Bicycle	0.7%	2.4%	+ 33,000
Work Remotely	5.2%	5.4%	+ 5,000
Other	3.1%	4.9%	+ 37,000

Table 1: Difference between current and potential mode splits by mode. The number of potential trips added or reduced per year is included in the farthest column to the right.

Case Study - *University of Nebraska Medical Center/Nebraska Medicine*

Implementing an active transportation program was a no brainer for one of Omaha's largest employers. In the fall of 2014 UNMC/Nebraska Medicine was low on parking with an initial 88% of employees and students driving alone to work. Wanting to avoid building expensive and land-intensive parking garages, the medical center surveyed employees for the potential to create a shift to multiple modes of transportation. TravelSmart, an active commuting program, was implemented to engage employees and continue growth without adding parking.

TravelSmart participants receive free transit passes, free parking for carpoolers, secure indoor bicycle parking, and access to a free emergency ride home. Participants who choose to give up their parking passes (typically those who use an alternative mode at least three days a week) have access to daily parking. From 2014 to 2017, the percentage of employees actively commuting rose from 12% to 22%. Several hundred carpools have been set up and they are on pace to have more than 60,000 transit trips made this year. The transit program has been popular among employees, as they account for 89% of all transit commutes with the remaining 11% of transit trips from students. Importantly, the organization has been able to avoid adding parking, and along with a variety of other factors, the organization's engagement score continues to increase.

Benefits to Active Commuting

A reduction in 18% of trips to and from work or school results in significant environmental and financial benefits. Parking is often viewed as a free or low-cost amenity, when in fact parking can be a large cost to an organization. According to a 2013 report, surface parking in Omaha costs between $73 - $163 per month, while garage parking costs between $199 - $224 per month.[6] Owning a car is also a large expense for an employee, with AAA estimating in 2017 it costs $709 a month—over $8,500 a year—to own, operate, and maintain a car.[7]

Employees understand the myriad benefits of actively commuting. Of the employees surveyed, the top reasons for bicycling, walking, carpooling or busing are to avoid parking, save money, exercise and gain health benefits, and help the environment (Figure 5). Other popular reasons are to avoid wear and tear on vehicles, reduce greenhouse gases, and have companionship when traveling. Commuters who take transit or are carpool passengers also have the added benefit of being able to be productive during their commute by reading for leisure, catching up on important communications, and safely use their smart phones.

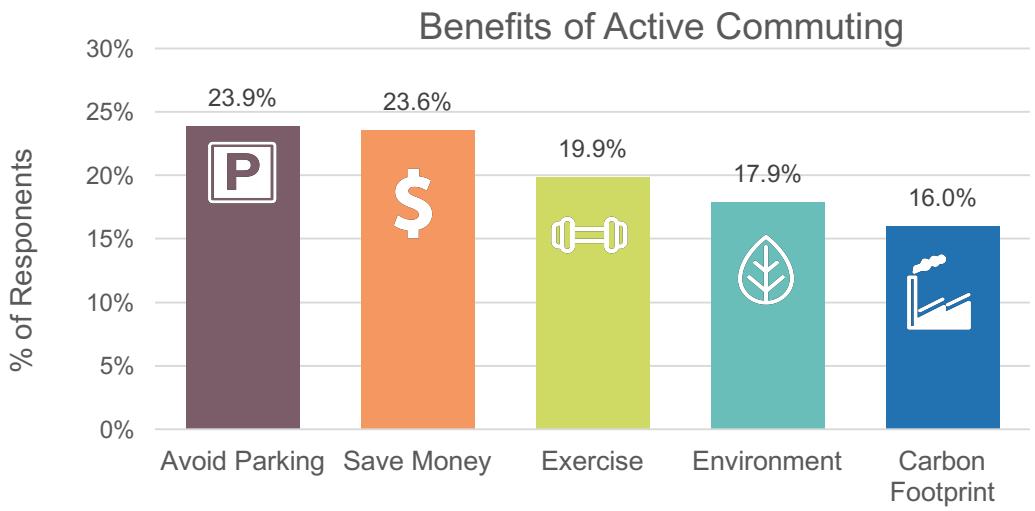

Figure 5: The top five benefits of active commuting are seen above. Survey participants were asked to select the benefits associated with their active commute to work. Because participants could select more than one benefit, the percentages add up to over 100.

[6] Omaha Metro. 2013. Parking Problems? Transit Programs as a Cost-Effective Solution.
[7] Stepp, Erin. 2017. AAA Reveals True Cost of Vehicle Ownership. AAA Newsroom.

Active commuting not only benefits individual employees and organizations, but the city as a whole. Active commuting reduces parking demand, which allows that land to be used for other purposes like green space, more buildings, business, apartments and other recreational purposes (Figure 6). Dense, interesting and well-designed cities are more likely to attract tourists and talent, which brings in revenue for the entire area. Cities that invest in more parking like New Haven and Hartford have seen a reduction in people and jobs within the city, and are less enticing for tourists than cities like Cambridge and Arlington that have reduced investment in parking.[8]

Due to the employer's preferences of the distributed surveys, there was not enough information to draw conclusions about the gender and age of those who would want to switch trips. Benefits will vary for employees depending on the organizations, but across all organizations, active commuting can help create healthy lifestyles, keep our air clean and our city vibrant and create financial savings for both employee and employer.

Figure 6: When the number of people actively commuting increases, cities benefit in a myriad of ways from reducing parking demand to allowing for more creative land use.

[8] Garrick, Norman and McCahill, Chris. 2013. Cars and Robust Cities are Fundamentally Incompatible. City Lab.

How to Fill the Gap

Once the gap between how employees currently commute and how they would prefer to commute is identified, it is important to understand key barriers that prevent the potential from becoming reality. Surveys over the course of the last four years have established a series of top barriers for active commuting (seen in Table 3). There are several barriers that employers have direct control over, and when removed, can effectively help commuters change modes from driving alone to the mode of their choice. Having the freedom to make commuting choices can increase employee engagement and well-being.

There are also barriers that employers cannot directly affect such as public bicycle infrastructure connecting to their place of business. Infrastructure barriers can be addressed by working with the local municipality, neighboring businesses, chamber of commerce, and community groups. Barriers that employers have little or no influence over, such as an employee's before and after work schedules, highlight the fact that active commuting isn't for everyone. It will work for some, as indicated by the opportunity gap in the survey, but for others the barriers are too high to overcome. The purpose of active commuting programs is to achieve the potential in each organization.

	Walk 	Bicycle 	Transit 	Carpool 
1	**Distance.** Individual lives too far.	**Distance.** Individual lives too far.	**Scheduling.** Car needed before or after work/class.	**Stranded**. Fear of being left at work.
2	**Time.** Mode takes too long.	**Scheduling.** Car needed before or after work/class.	**Time.** Mode takes too long.	**Partner**. Had a carpooling partner.
3	**Emergencies**. There was a way to get around during the day or when needed in case of an emergency.	**Time.** Mode takes too long.	**Infrastructure.** Service provided near home.	**Emergencies**. There was a way to get around during the day or when needed in case of an emergency.
4	**Scheduling.** Car needed before or after work/class.	**Infrastructure.** There were sufficient bicycle lanes or paths.	**Emergencies**. There was a way to get around during the day or when needed in case of an emergency.	**Time.** Mode takes too long.

Table 2: The top four barriers for each commute mode listed in order from number 1 at the top to number 4 at the bottom.

Recommendations for Action

The local metro data in this report shows a gap between how metro employees currently commute and how they would like to. A significant number of employees are interested in using active transportation but need infrastructure and programs that both remove barriers and support them, much like businesses provide parking to support employees who drive to work. Providing support for employees who would like to actively commute has financial benefits for both organizations and their employees and students, employee engagement and health, and for our environment.

Below are strategies for organizations that are ready to meet their employees' desire for more mobility choices.

1. **Collect data.** Having specific data from your employees informs decisions about implementing a program that will be more successful. Conducting a transportation and parking survey has proven to be a successful way to collect this key data. Another helpful means to collect data is to discuss active transportation possibilities with interested employees from all levels in the organization. Third party resources are available to provide support during this phase, including conducting a transportation and parking survey catered to your organization's specific needs.

2. **Implementation**. Strategies should be chosen based on an organization's potential mode split and the motivations and barriers employees face, as gathered in step one. There are many resources available to help plan and implement an active transportation program, including the Active Commuting Toolkit, available for WELLCOM members. Designing and implementing an active transportation program includes communication and outreach, strategy implementation, cost analysis and program development among other services. Below are five ways to begin implementation of a program.

    - **Join Metro Rideshare**. Encourage employees to join Omaha Metro's ridesharing program to help facilitate carpooling.
    - **Join Metro Transit's Commuter Pass Program**. Purchasing tickets from Metro in bulk can qualify your organization for reduced rates.
    - **Partner with Heartland B-Cycle**. Work with Heartland B-Cycle to provide memberships to employees for access to the B-Cycles around the city.
    - **Support employees in using NDOT Vanpools**. Encourage employees to take part in the state's Vanpool initiative.
    - **Share Online or Printed Bicycle Maps & Install Bicycle Parking.** Empower employees with information on where active transportation infrastructure exists near your organization and add bicycle parking.

It is important to note that the most effective and successful active transportation programs are cohesive, well informed by employees, and well communicated across the organization. For more information please visit: www.heartland2050.org/tdmwhitepaper

Appendix

Transportation Method	% of Trips from Surveys	% of Trips from Omaha MSA Census	% of Trips from USA Census
Drive Alone	76.3%	83.7%	76.4%
Carpool	8.2%	8.9%	9.3%
Walk	5.9%	1.9%	2.8%
Transit	0.6%	0.9%	5.1%
Bicycle	0.7%	0.2%	0.6%
Work Remotely	5.2%	3.5%	4.6%
Other	3.1%	0.9%	1.2%

Percentage of trips taken by each mode from organizations surveyed, compared to the MSA for Omaha and the US in the 2013-15 census.