

AAATA getDowntown Commuter and Employer Study

Executive Summary

The purpose of this study was to gain an understanding and measure of the impact of AAATA's getDowntown program.

In 2023 slightly more than half of employees travel downtown for work on any given weekday – a vast difference from 2018 when this was over 90%. As a result, traffic and parking congestion are less of a concern to employers and they are offering fewer alternative transportation options to their employees. Carpooling and Park and Ride have had the largest decline in alternative transportation methods since 2018.

61% of commuters now work from home at least occasionally, up from 21% in 2018, with 93% who wish to work from home at least once a week.

Awareness of go!pass has declined. In 2018 awareness was 81% and that fell to 56% in 2023. 30% of people who are willing to use go!pass for TheRide do not currently have access to one.

Overall satisfaction with the getDowntown program has grown more neutral among employers as fewer decision makers are using getDowntown as a resource compared to 2018.

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Part 1: Survey and Study Design

The Employer survey was distributed to various employers in downtown Ann Arbor via a survey link embedded in an email. The Commuter survey was open to anyone who commutes to Ann Arbor, with approximately 26% of responses from people outside of downtown. Employers then distributed it to their employees (commuters).

Sample:

<i>Employers</i>	<i>n = 97</i>
<i>Commuters</i>	<i>n = 199</i>

Field Dates:

<i>Employers</i>	<i>4/4/2023 - 4/24/2023</i>
<i>Commuters</i>	<i>4/10/2023 – 5/10/2023</i>

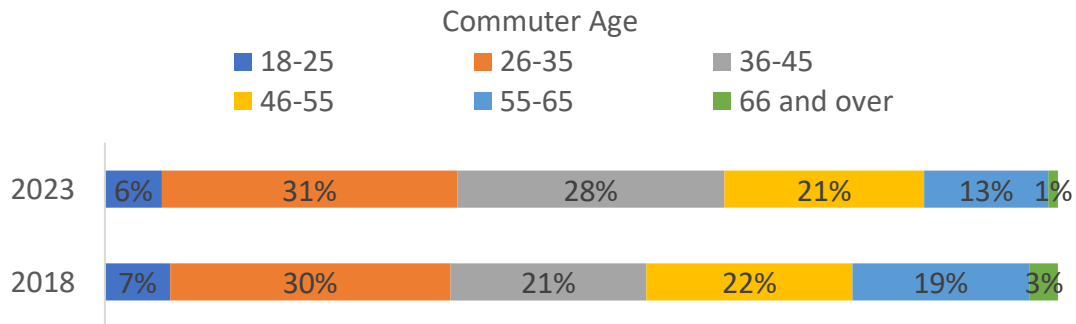
The data from the 2023 survey were compared to data previously collected in the 2018 survey when it was possible and relevant to do so. Wording differences in some of the questions from 2018 to 2023 meant that not every question was able to be compared.

Part 2: Demographics

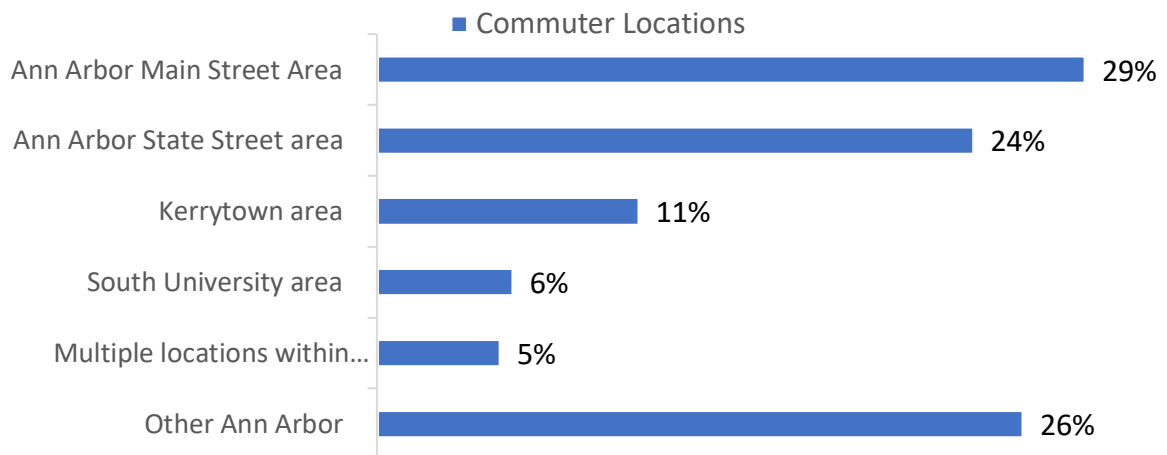
In 2023 more people reported their gender as female (61%) than in 2018 (52%). Note that 8% identified as non-binary, which was not an option in 2018.

Income among commuters was relatively stable in 2023, with a slight increase in the over \$50k+ income range.

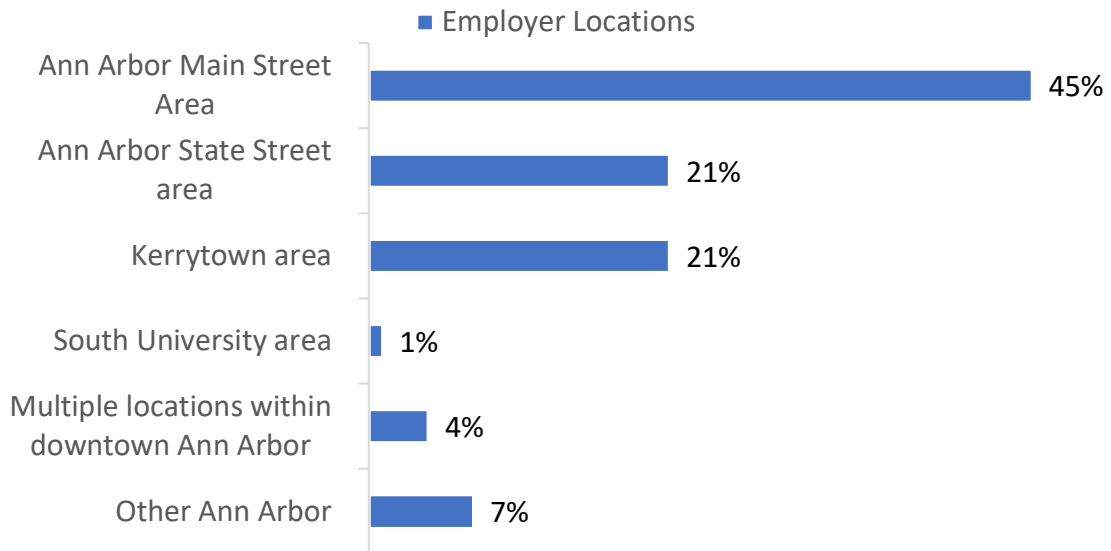
Age increased slightly in 2023 at the expense of the 36–45-year-old groups.



The areas in which people work in Ann Arbor cluster around two primary areas - Main and State Street, or a mix of Other areas. The remainder work in Kerrytown, the South University area or in multiple locations.

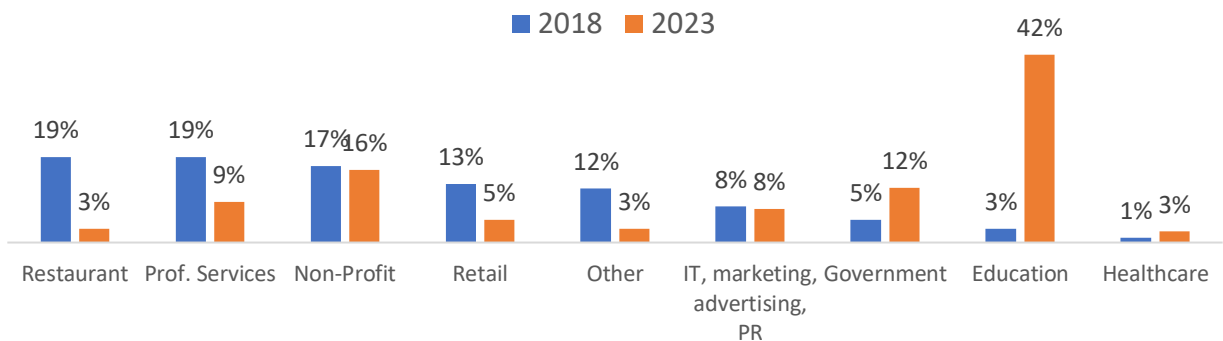


Nearly half of the employer sample comes from the Main Street area. Most of the remaining employers were from either the State Street Area or the Kerrytown area.

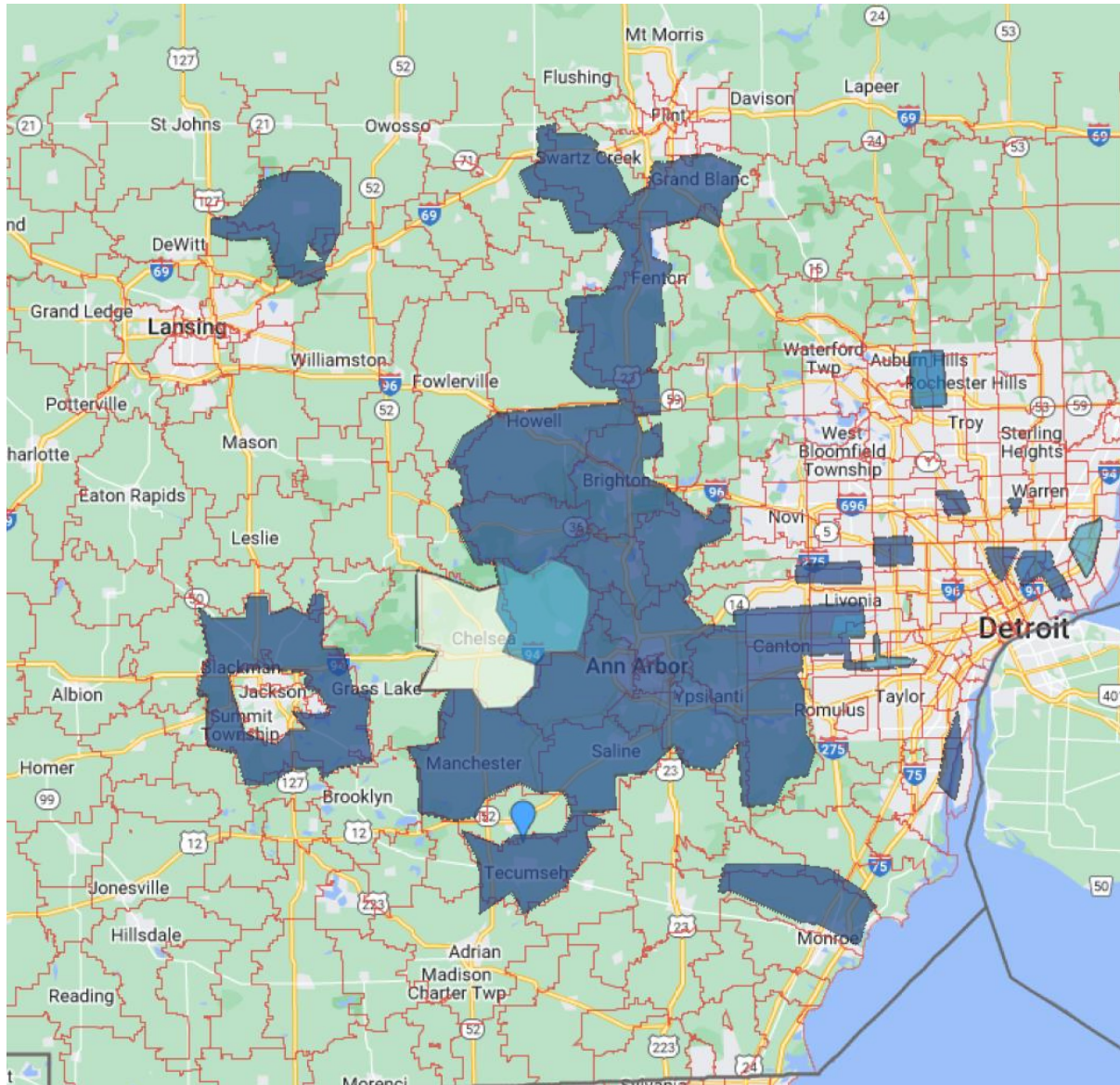


In the Employer study, we see increases in Retail and Food Service workers. And for Commuters, the education sector leads the way. It is important to note the significant increase of respondents who work in the education field.

What industries do commuters work in?



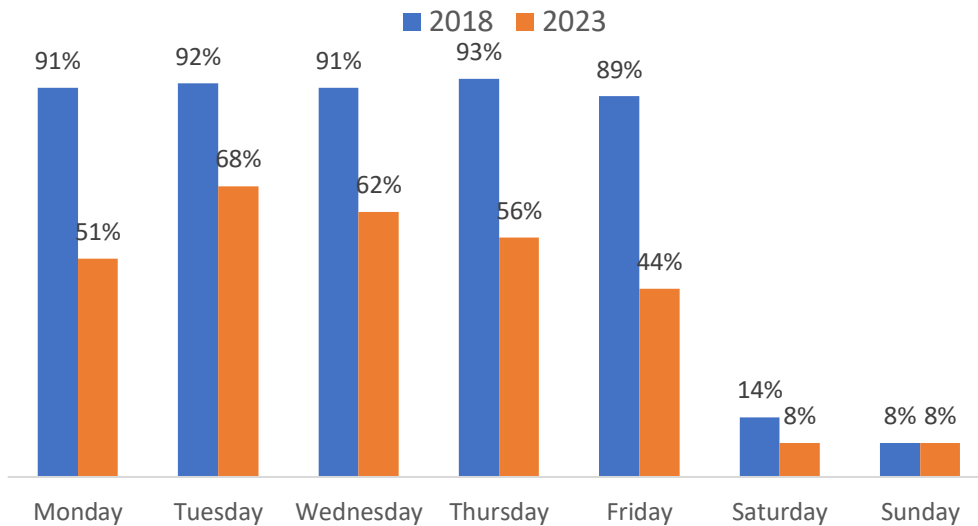
The largest number of respondents were from the Chelsea ZIP code (48103) at 52 completed surveys, followed by Ann Arbor (48104, 48105, and 48109) at 46, and Ypsilanti (48197) at 27.



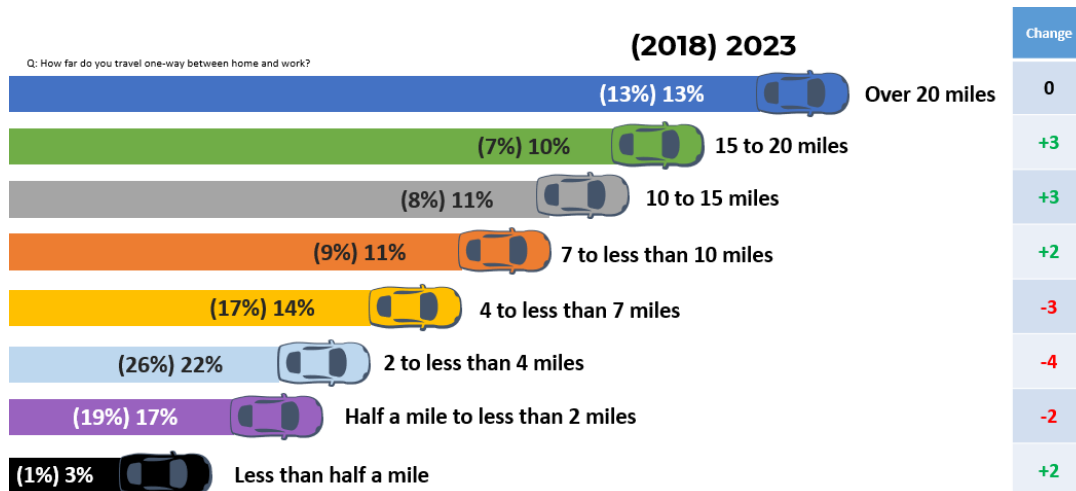
Part 3: Travel and Location

Commuters are traveling to Ann Arbor less often than in 2018 on a daily, weekday basis. There is also a 6% decrease on Saturdays. Sunday is the only day that is consistent with 2018 regarding commuters traveling to downtown Ann Arbor.

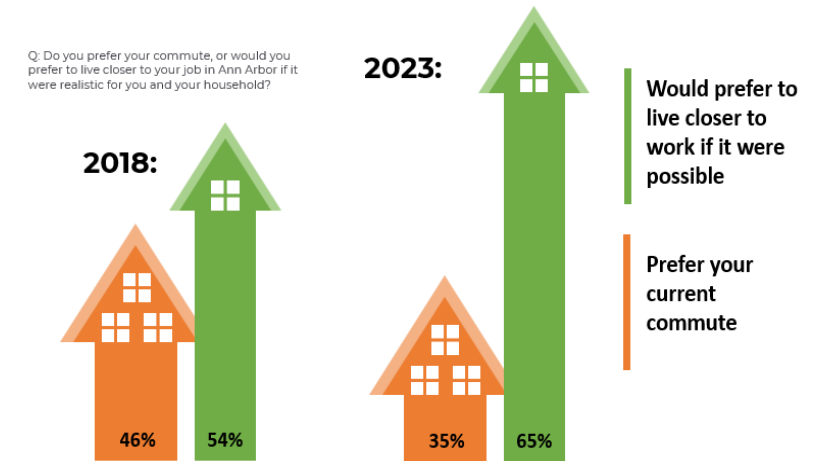
Days Commuters Travel Downtown



There were no drastic differences in the distances people travel for work. However, looking at an aggregate of 7+ miles, there is a 7% increase from 2018.

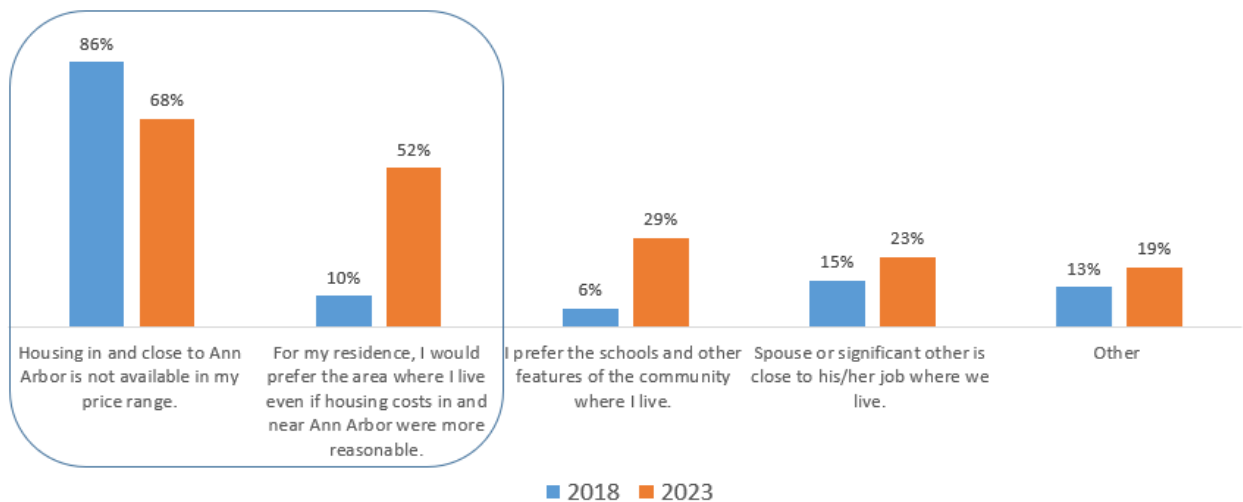


There is an 11% increase in people who say they would prefer to live closer to work if possible. As consumers who were working from home during COVID have gone back to their old commute, it may feel like more of a burden now than it did pre-COVID. In that way, COVID may have caused people to prefer to live closer to work.



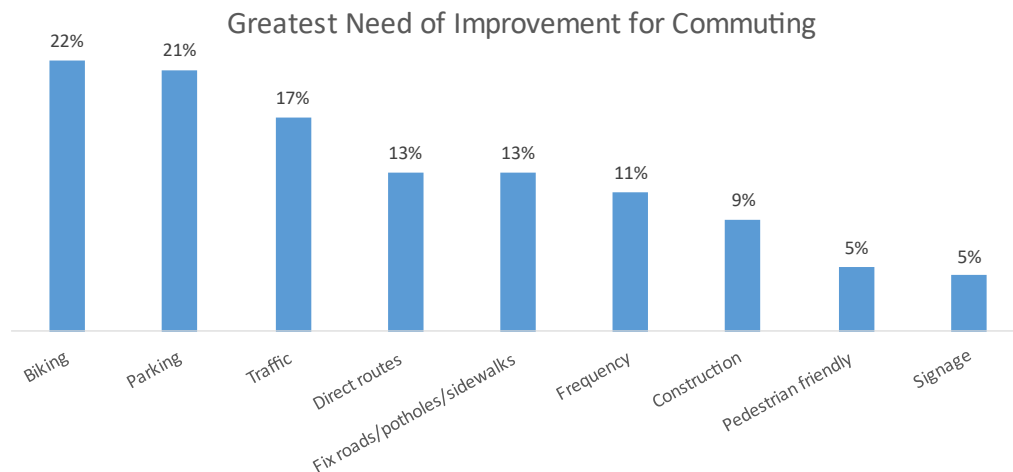
Among commuters who prefer where they currently live, price has become less of a factor than it was in 2018. However, 65% would prefer to live closer if it were realistic for their household and price may play a factor for them.

Reasons commuters prefer where they live



Commuters were asked what the greatest need for improvement was to improve the downtown commute. The most common comments were regarding safer bike paths (22%), better parking (21%), and less overall traffic (17%).

Respondents also wanted more direct routes, more frequent buses, less construction, and fixing potholes and sidewalks.



Biking

- Additional safe bike routes. The William bikeway is great!
- More protected bike lanes! Well, this has improved a lot in the downtown area so may be outside your zone of influence, but getting to that safe zone is still too hard.
- Safe streets for cyclists, more separate facilities and barriers for cars to improve safety.
- The potholes are dangerous for bikers. I choose my route not by the shortest distance but go a longer way to ride on roads that aren't falling apart.
- As a biker, Washington Street is in dire need of street repairs-- lots of potholes. I love the bike lane on Miller and go out of my way to take it.

Parking

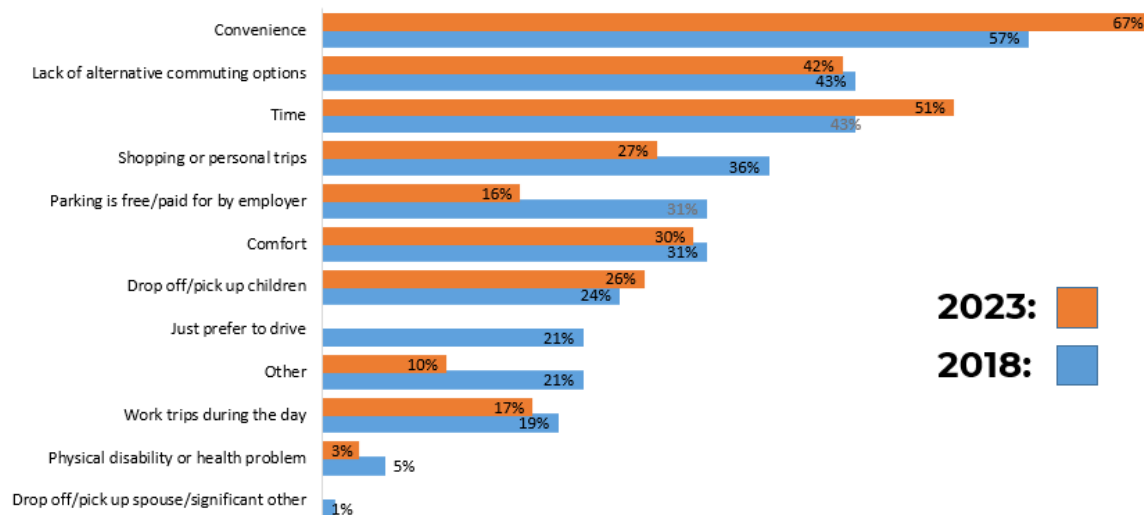
- I wish the city and my employer could provide some cheap/free parking options in a structure. There are currently no other options available to me besides driving.
- Parking needs to be free. Having to pay to park near my workplace is outrageous. If employers cannot offer free parking, then they need to reimburse their employees.
- The decline of street parking for cars in favor of other means of transportation that aren't practical on a daily basis for those of us that got priced out of town.
- There needs to be more surface lots and parking meters.
- Free parking for commuters.

Traffic

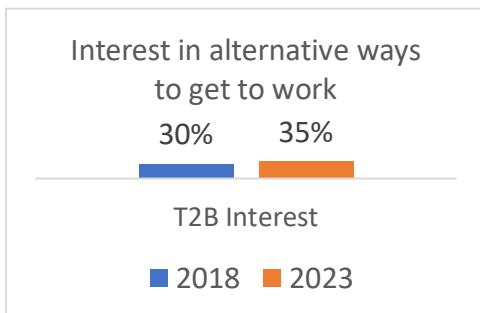
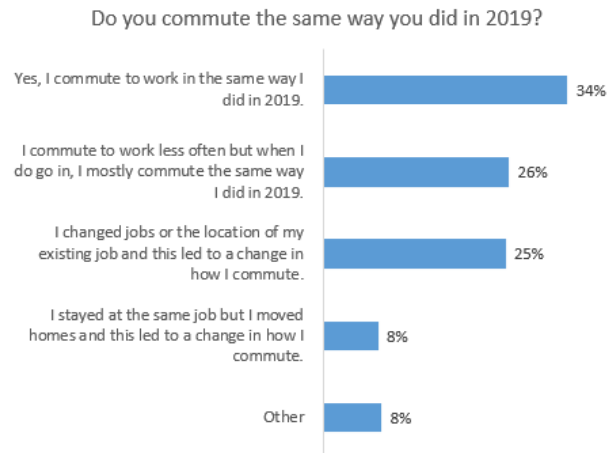
- Hospital traffic coming off or getting on M-14.
- Accessible parking for larger vehicles (like pickup trucks). Also, 90% of my commute time is getting in and out of Ann Arbor. Traffic and construction make it almost unbearable.
- I've noticed that during rush hour, most of the traffic is concentrated on the north-south streets and the east-west ones are comparatively empty.
- Lot of congestion on the roads.
- Need to fix rush hour traffic-- perhaps stop putting in bike lanes that only congest traffic more. Need to put up 'don't block the box' signs and cite anyone who blocks an intersection.

Part 4: Primary and Alternative Transportation Methods

Driving alone to work is still the most common method of transportation for commuters and employers alike. Commuters choose to drive to work alone due to time and convenience which have both increased since the 2018 study. Shopping and personal trips as well as paid parking have diminished in importance among commuters since 2018.

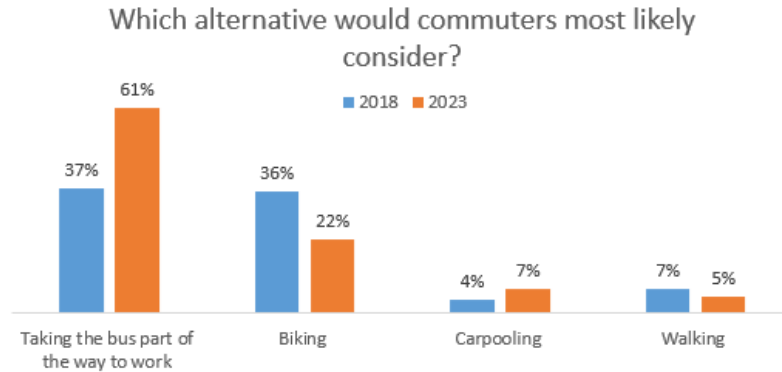


Although driving alone is still the most popular method of transportation to get to and from work, there have been changes in recent years. When commuters were asked if they commute the same way they did in 2019, only 60% stated that they do. The most common method used by those who switched was driving alone.

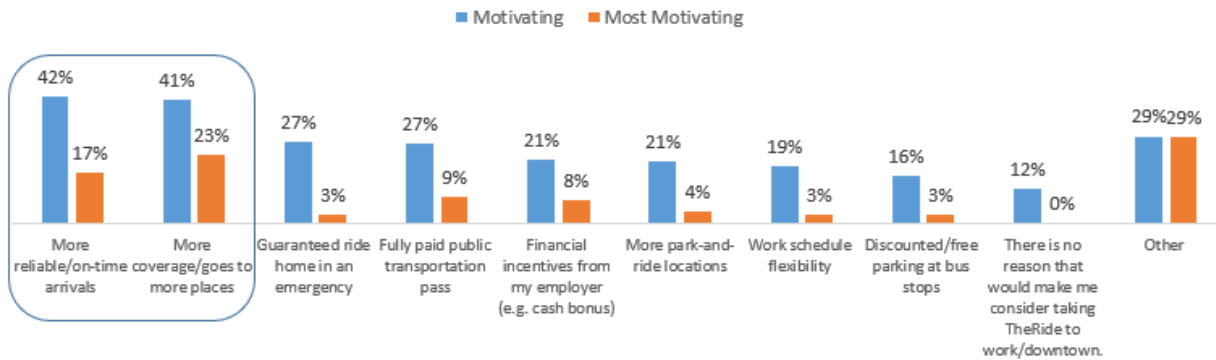


There has been an increased interest in considering alternative ways to get to work since 2018. Among commuters willing to make a change in the way they get to work, taking the bus at least part of the way is the most popular alternative.

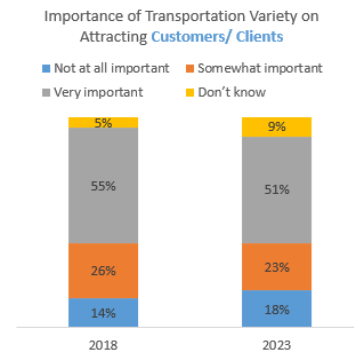
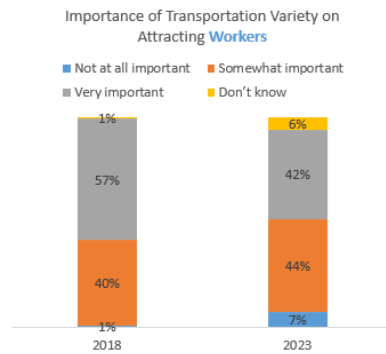
There are several motivating factors that commuters consider when thinking about taking the bus to and from work. Ultimately the most motivating factors include on-time, reliable service, and availability of various bus routes and route coverage.



How to get Commuters to Switch to the Bus for Work

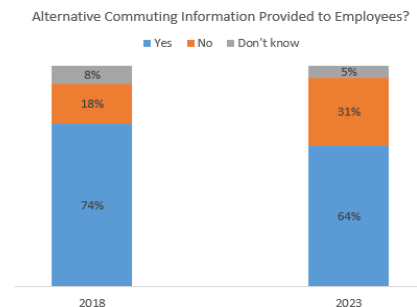


Employers think that offering a variety of transportation methods is less important in terms of attracting employees as well as customers/clients compared to 2018. According to employers, giving employees a choice of

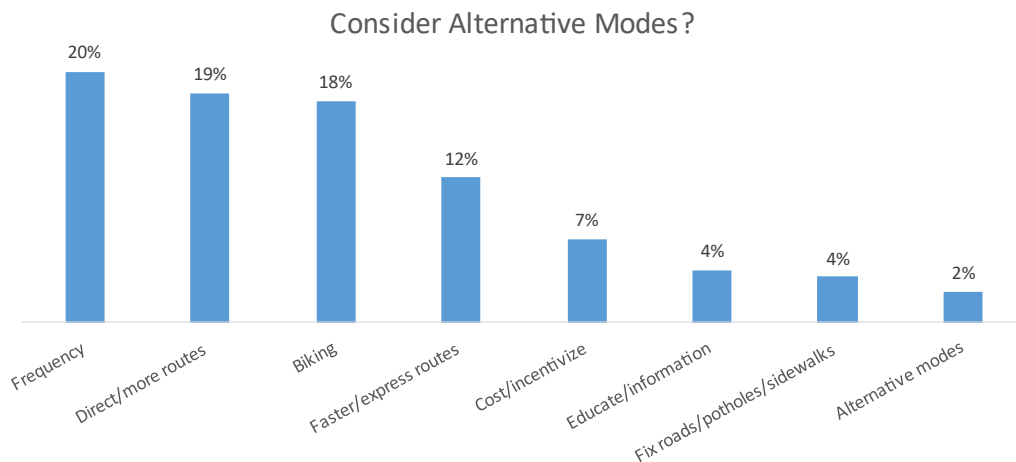


transportation variety has gone down significantly in terms of the importance of attracting top employees. This is in line with what we would expect with an increase in remote work. In terms of attracting customers and clients the numbers are more stable, however there is still a slight decline in importance compared to 2018.

This can also be seen in the decrease in alternative transportation information being provided to commuters from their employers.



Commuters were asked what it would take for them to consider alternative modes of commuting. Similar to what they felt the city could do to improve downtown commuting, many noted more frequent buses (especially to their neighborhoods), a larger variety of routes, and biking options.



Others noted incentivizing commuters with making the buses free or some other monetary incentive to not drive downtown.

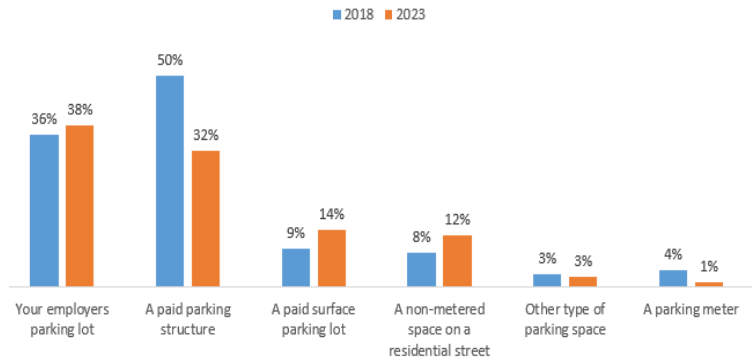
Many simply wouldn't consider it at all. Often it was a question of taking too much time or they simply didn't see it as a convenient option.

- It comes down to travel time. I can get from my front door to my desk in roughly 18-25 minutes by car, or 45+ minutes if I take the bus. I'd LOVE to use public transit more often if it didn't take literally twice as long to get where I'm going.
- I don't think I could be convinced right now.
- Sadly, I really am my own limitation here- it's just time and preparation, so the car wins out most of the time. These challenges are really helpful, actually, to get the conversation going and to create a little social reward to offset the (embarrassingly minor but apparently real!) inconvenience.
- None of those options would work for me.
- Taking a bus would simply take up too much of my time. I spend over an hour driving every day even when there isn't traffic. It is a draining commute, and I do not want to see that become even longer.

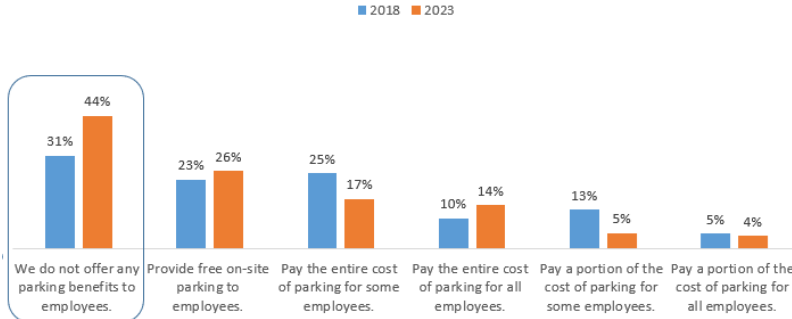
Part 5: Parking

There have been some changes in commuter parking behaviors since the 2018 study was conducted. The first one being a significant decrease in commuters parking in paid parking structures. There has also been a slight lift in commuters parking in non-metered residential streets.

Where Commuters are Parking

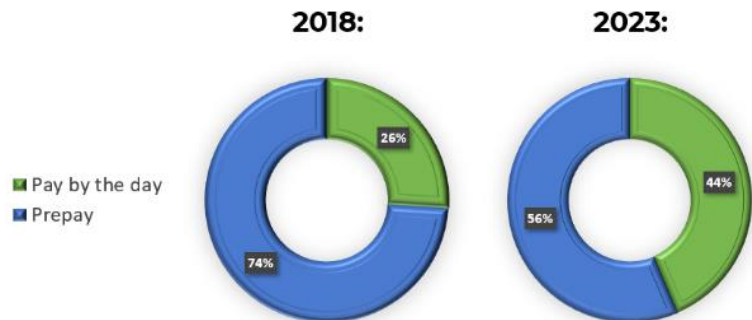


Parking benefits offered to employees



Parking benefits have gone down since 2018 likely as a result of the rise of remote work and sustainability initiatives. A 13-percentage point increase in employers not offering any parking benefits to employees may indicate that the increase in remote work has made parking benefits less of a priority than it once was.

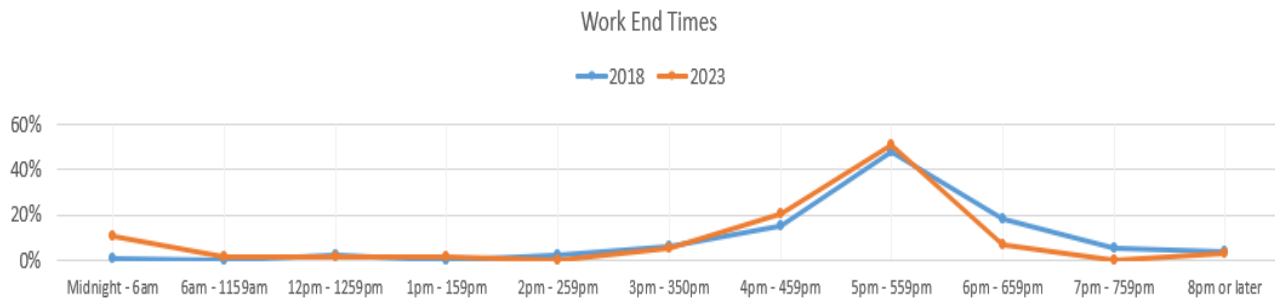
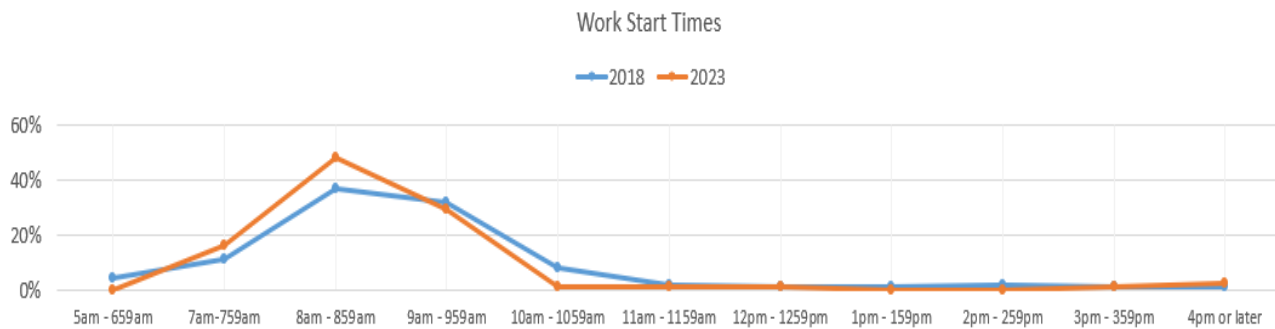
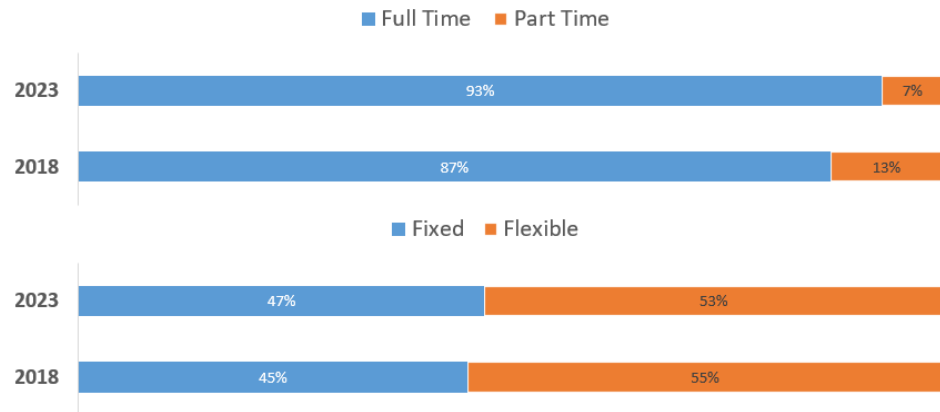
Additionally, there has been an increase in the percentage of consumers who state that they choose to do “pay by the day” parking rather than using a prepaid method.



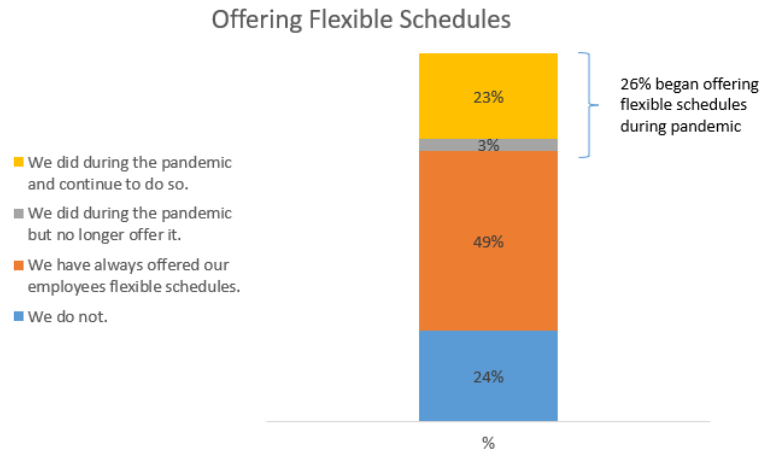
Part 6: Companies and Organizations

The companies that participated in the 2023 study are relatively consistent with what we had in 2018 in terms of full-time vs part-time staff and the percentage of fixed or flexible schedules. With the increase in remote

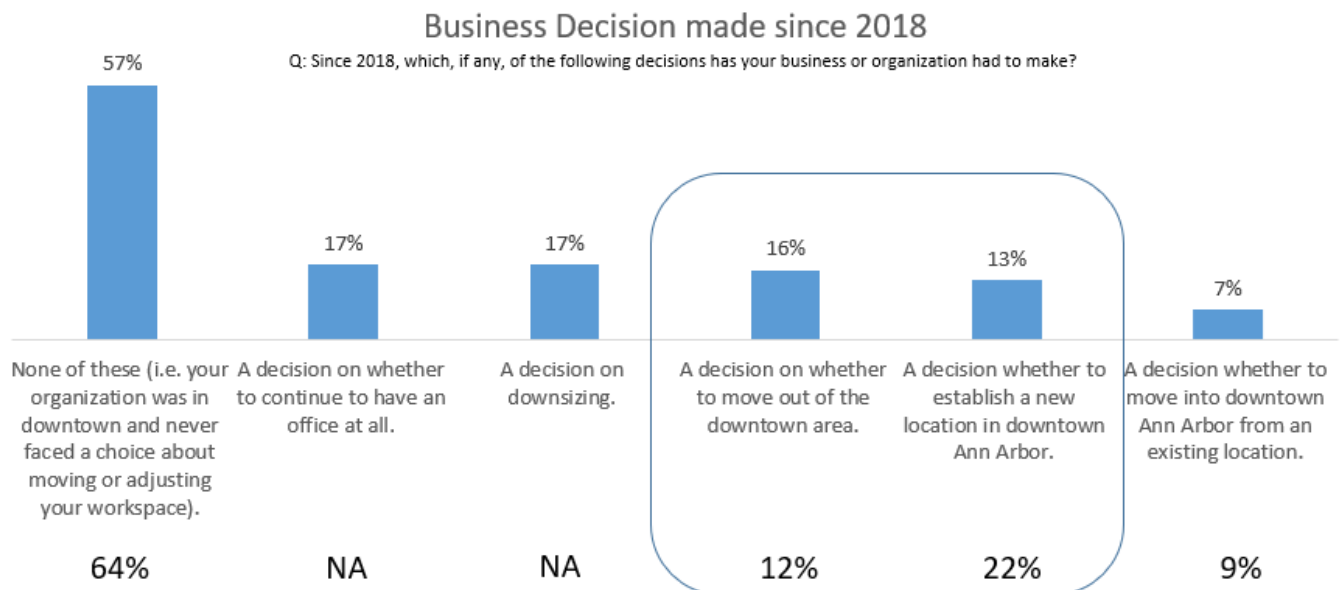
work, we would expect to see an increase in flexible schedules, however given that our sample of commuters is largely affiliated with educational institutions, we acknowledge that they are bound by a stricter school schedule. One finding we observed, however, is that there have been changes in commuters' start and end times. In 2023 more commuters will start their days earlier and finish earlier compared to 2018.



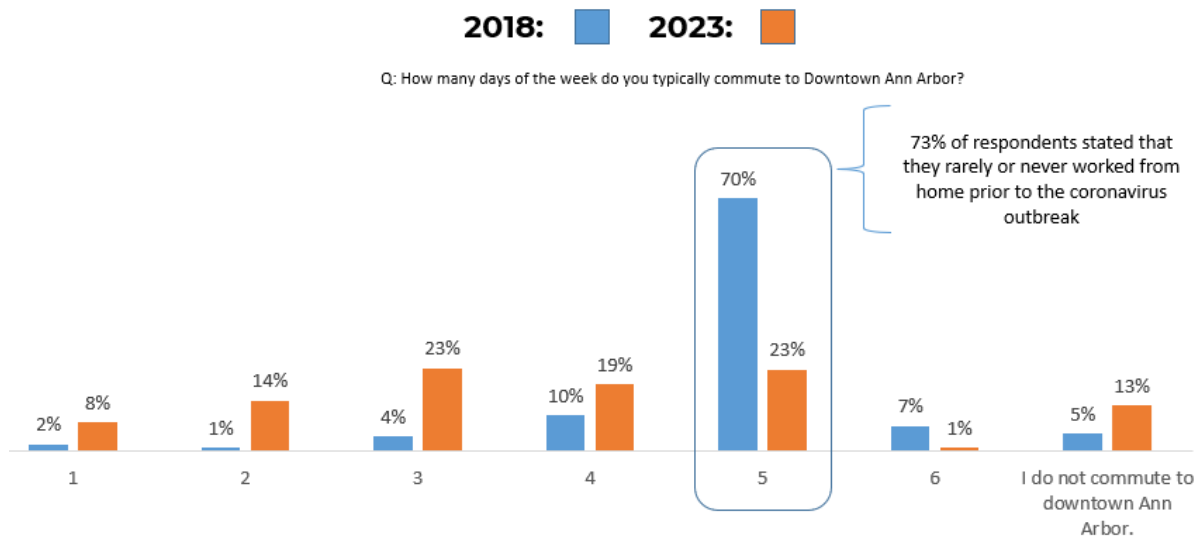
The pandemic is having a lasting effect on flexible work schedules. Of the 26% that started to offer flexibility during the pandemic, 23% continue to do so.



The data in the study suggests that more employers are considering moving from downtown, and fewer businesses are considering opening a second location. The question we asked employers is “Since 2018, which, if any, of the following decisions has your business or organization had to make?”. Our comparison metric was the same question asked in 2018 but asked about what decisions they have had to make since 2013.



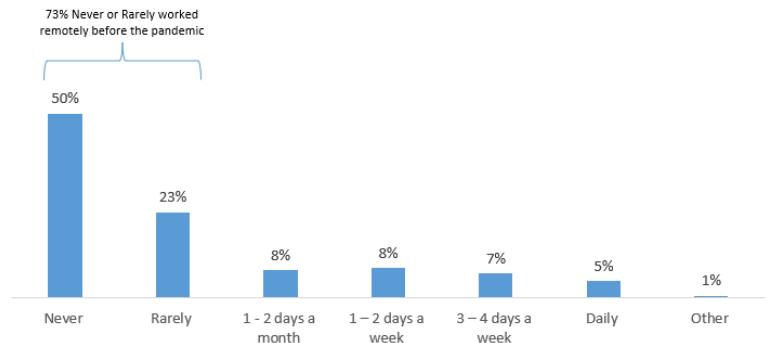
The COVID-19 pandemic has caused a large shift in the number of days commuters travel downtown for work. Before the pandemic commuting to downtown Ann Arbor 5 days per week was the norm by far, with 70% of commuters doing it. In 2023 however, this has changed quite a bit with less than 1/4th of commuters traveling downtown for work daily.



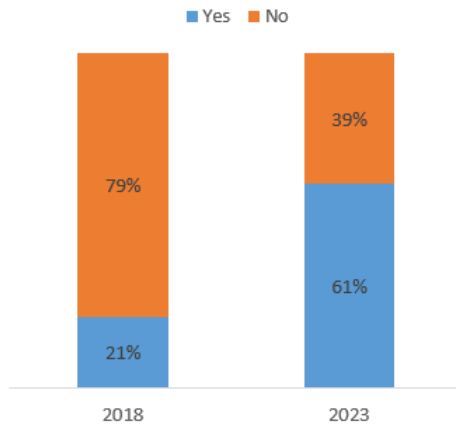
Part 7: Working Remotely

Remote work has seen a rapid rise in light of the COVID-19 pandemic. 73% of respondents stated that they never or rarely worked remotely prior to the pandemic. Now 61% of commuters in our study work remotely, at least occasionally. Among those who occasionally work remotely 42% do so 3 days or more a week, up from 12% in 2018.

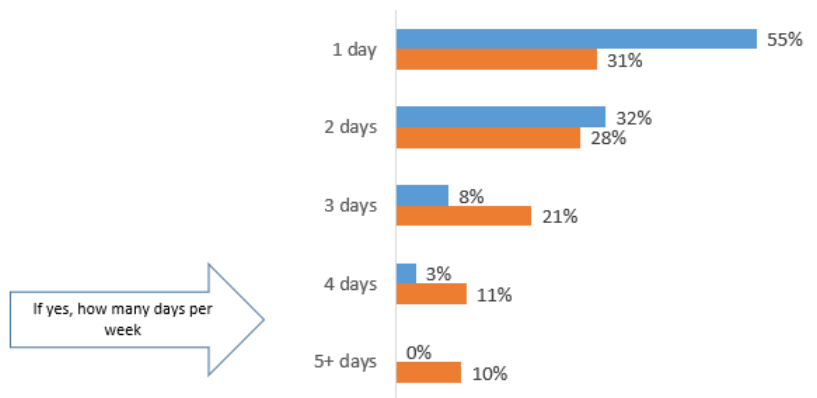
Working Remotely Frequency Prior to Pandemic



% of People who Work Remotely at Least Occasionally

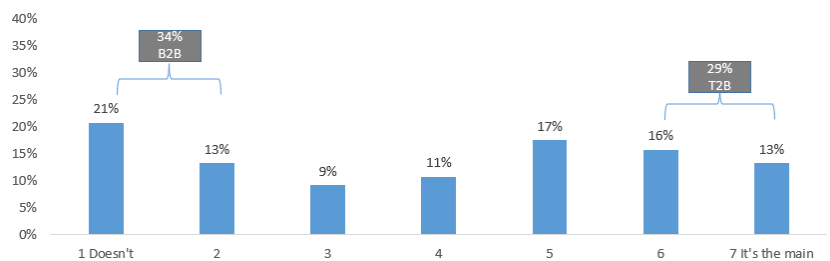


Among those who do Work Remotely, how Often?

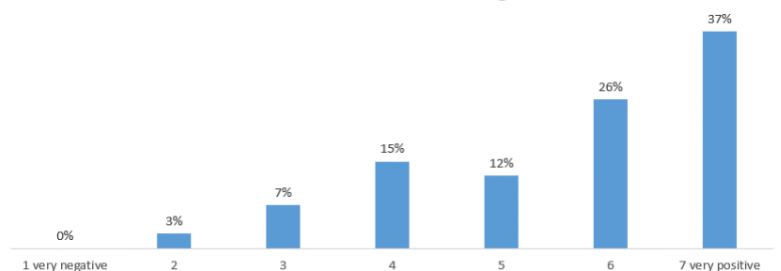


Commuters are evenly distributed in terms of how much their commute influences them to work from home with slight polarization at each end of the scale. Only 29% of respondents have commuting as a top 2 box reason why they work from home while 34% say it does not really impact their decision at all. Overall, commuters feel very positive towards the notion of remote work. In fact, 93% of consumers state that, if possible, they would like to work remotely at least once per week.

How much does commute influence working from home?



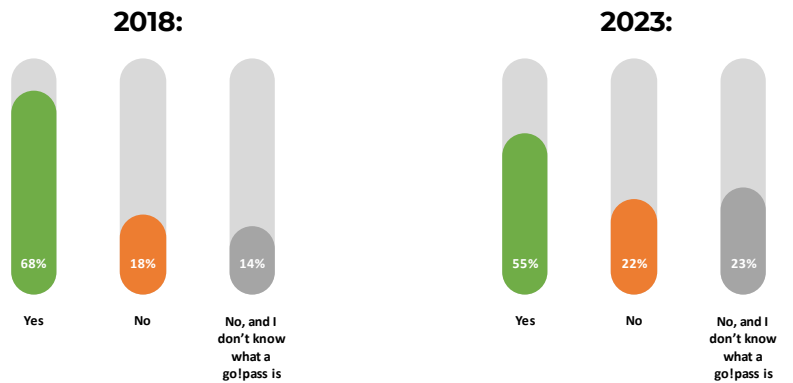
How do Commuters feel about Working from Home?



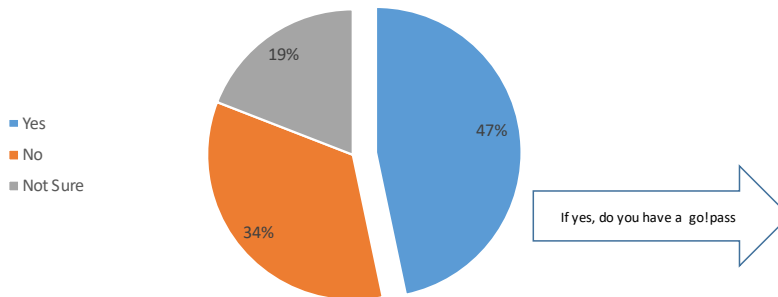
Part 8: go!pass and getDowntown

Fewer employers have offered a go!pass in 2023 compared to 2018, according to commuters who were asked 'Has your employer offered you a go!Pass?'.

There is demand for go!pass, as 30% of people willing to use go!pass for TheRide do not currently have access to one.

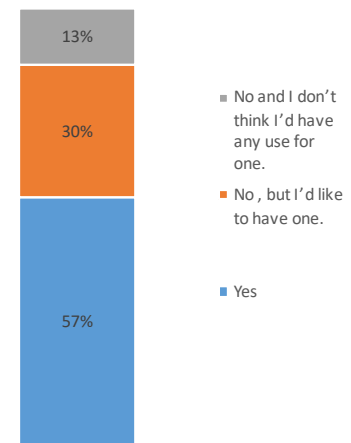


If you had a go!pass, would you use it for TheRide?

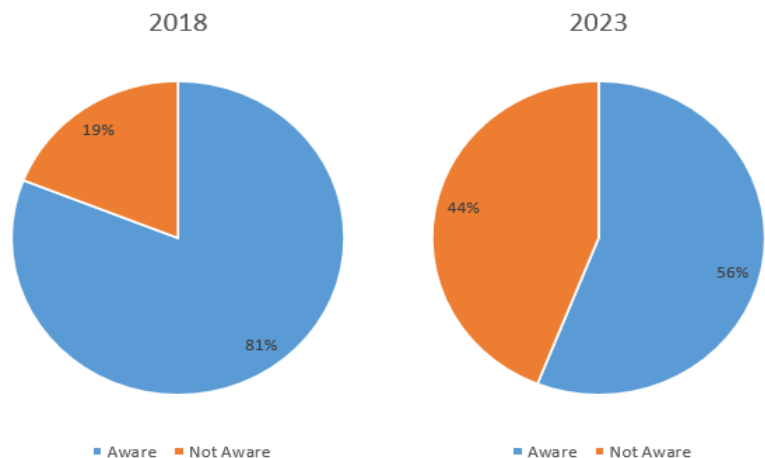


If yes, do you have a go!pass

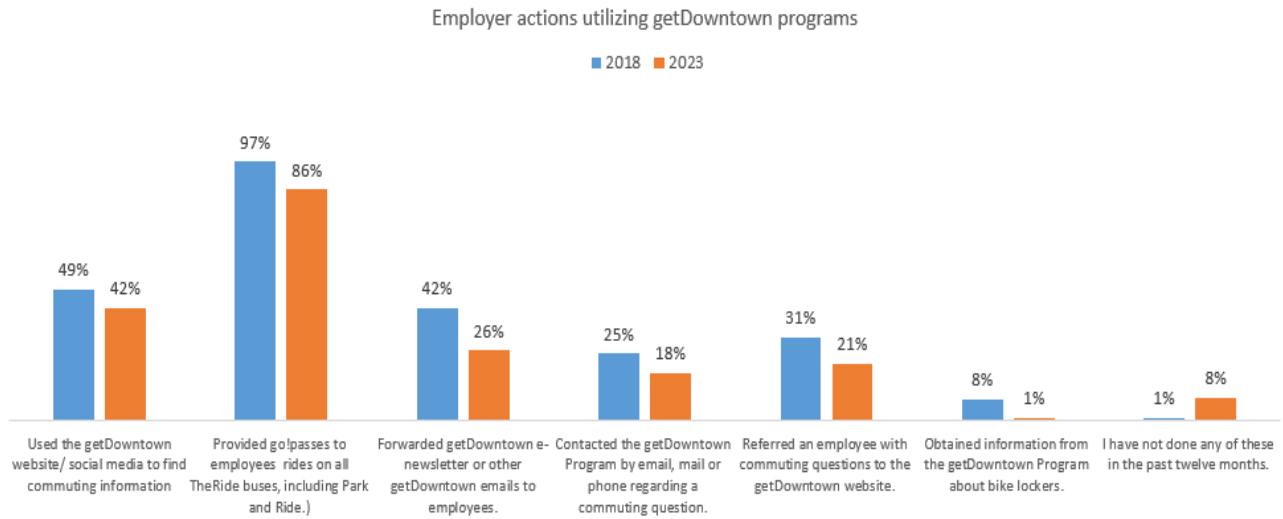
Do you have a go!pass?



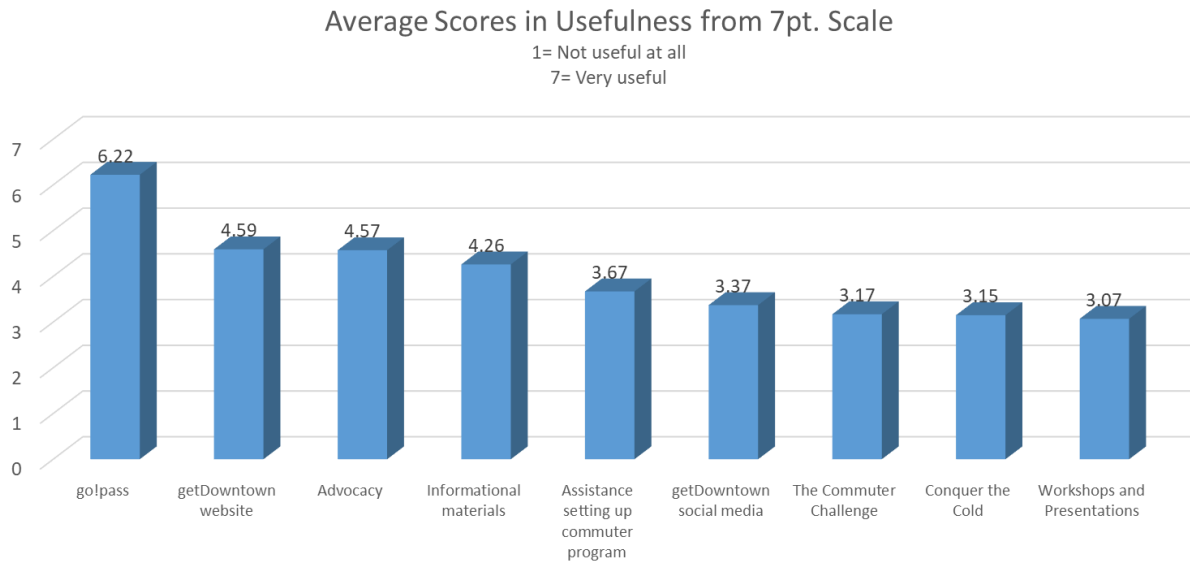
There has been a decrease in awareness of getDowntown since 2018. It dropped from 81% in 2018 to just 56% in 2023.



Decision makers are using getDowntown as a resource less than they were in 2018.



go!pass is the most notable program for companies in terms of usefulness.



Satisfaction with getDowntown services is still high, although down compared to 2018.

