

2022 Transportation Survey

December 2022





2022 Transportation Survey

In fall 2022, MassBio surveyed 1,338 professionals who work in or support the life sciences on the current state of transportation in Massachusetts and how it may be impacting the industry's ability to recruit and retain talent.

Overall, respondents are driving more and using public transportation less due to a lack of reliability and flexibility of the MBTA and Commuter Rail. Moreover, findings indicate that one-third of the life sciences workforce is in the office every day without the flexibility to work-from-home, while the impacts of long and stressful commutes could hurt the industry's growth in Massachusetts.

The survey serves as an update to [MassBio's 2019 Transportation Survey](#) conducted in July 2019. The 2019 survey serves as a critical resource in comparing how commuter behavior and employee satisfaction has changed since the COVID-19 pandemic.

The 2022 Transportation Survey was led by MassBio's Transportation Working Group. The Transportation Working Group is charged with identifying the key transportation-related challenges life sciences companies are facing, sharing what steps companies have taken or are considering to address these issues, and brainstorming internal policy and public policy changes that could help to alleviate some of these challenges.

In forming this working group, MassBio was intentional in including individuals with unique experiences and areas of expertise in order to foster creative solutions and innovative ideas.

The working group includes representatives from both large and small life sciences companies; individuals from the Boston/Cambridge cluster and growing clusters across the state including Worcester, South Coast, Route 128, and North Shore; and the voices of research and development, manufacturing, incubators, real estate, and non-profits.

"The Massachusetts economy faces competition from lower-cost states, and the results of this survey show that failing transportation infrastructure and fewer commuting options are impacting the life sciences industry.

"Much of our industry cannot work remotely and must commute to labs in urban centers. When there are more workers sitting in traffic, it creates an environment with unhappy, unproductive commuters and jeopardizes the state's goals of reducing emissions from the transportation sector. MassBio is working with our members to identify approaches to alleviating the commuting burdens on biotech workers.

"As an organization representing one of the largest and fastest growing industries in Massachusetts, we look forward to forming partnerships to develop and implement strategies that not only fix what is failing, but also plan for the future."

Kendalle Burlin O'Connell, President & incoming CEO of MassBio

About MassBio

MassBio's mission is to advance Massachusetts' leadership in the life sciences to grow the industry, add value to the healthcare system, and improve patient lives. MassBio represents the premier global life sciences and healthcare hub, with 1,600+ members dedicated to preventing, treating, and curing diseases through transformative science and technology that brings value and hope to patients. Founded in 1985, MassBio works to advance policy and promote education, while providing member programs, events, industry information, and services for the #1 life sciences cluster in the world.



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Key Findings

Commuters are driving alone to work more and using public transit less

- More than half of surveyed employees (57%) drive alone as their primary means of transportation; 44% of respondents to the 2019 survey said the same.
- Just 16% identified the bus/subway as their primary means of transportation with another 9% utilizing the Commuter Rail. In 2019, bus/subway was identified by 26% and the Commuter Rail by 15%.
- In explaining their choice to drive, 59% cite driving as faster than the alternatives, 40% say public transit is too unreliable, and 34% say public transit schedules do not work with their work schedule.

The performance of the MBTA continues to negatively impact those who rely on public transportation, though service has improved since 2019. In the past month:

- 61% of riders have been late for work due to delays on public transportation. This rate is 18% lower than it was in 2019, when 79% of respondents indicated they had been late to work due to public transportation delays.
- More than half of riders (57%) have been late for personal commitments after work, down from 69% in 2019.
- Over one-third of riders (36%) have been forced to spend money on out-of-pocket alternatives such as ridesharing, like Uber and Lyft.

One-third of workers in the life sciences do not work from home

- When asked how often they work from home, one-third of respondents (33%) said they do not work from home at all.
- Two-thirds of respondents (67%) work from home at least one day per week. In 2019, just 13% of surveyed employees worked from home one day per week and an additional 15% of respondents worked from home two or more days per week.
- 55% of respondents said they would consider changing jobs if it would provide a more flexible work-from-home policy.

More than a third of commuters say their commute is worse than pre-COVID

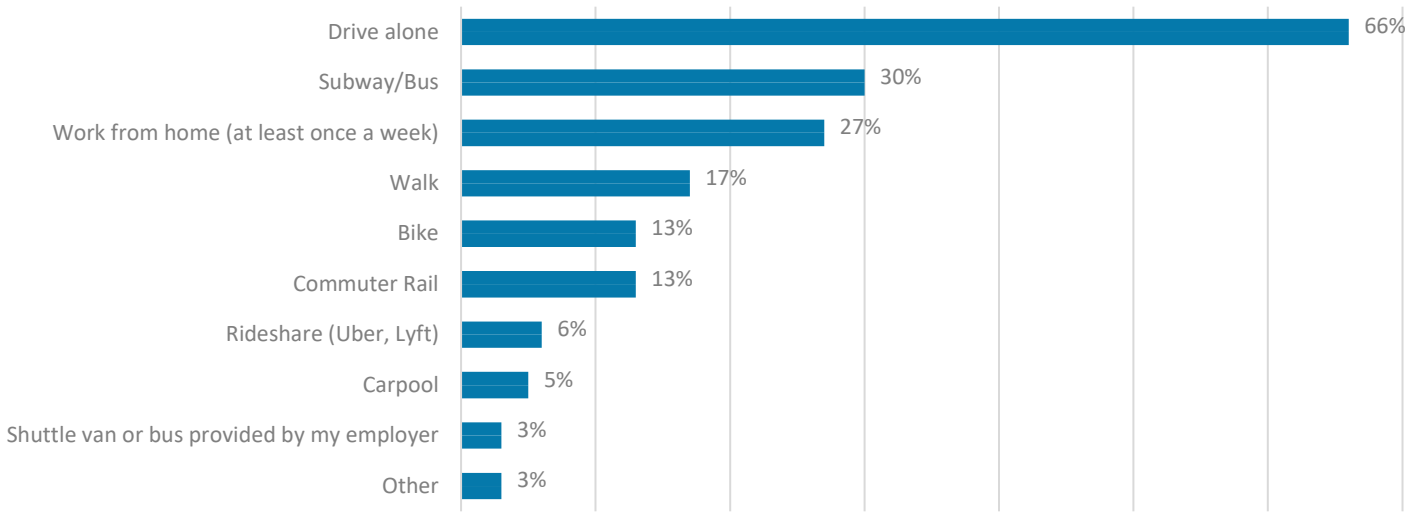
- When asked to compare their average commute today to their average commute before the COVID-19 pandemic, 35% describe it as worse.
- 49% report the same commute as before the pandemic, while 16% say their commute has improved.

Commutes are factoring into people's decision to change jobs, move out of state

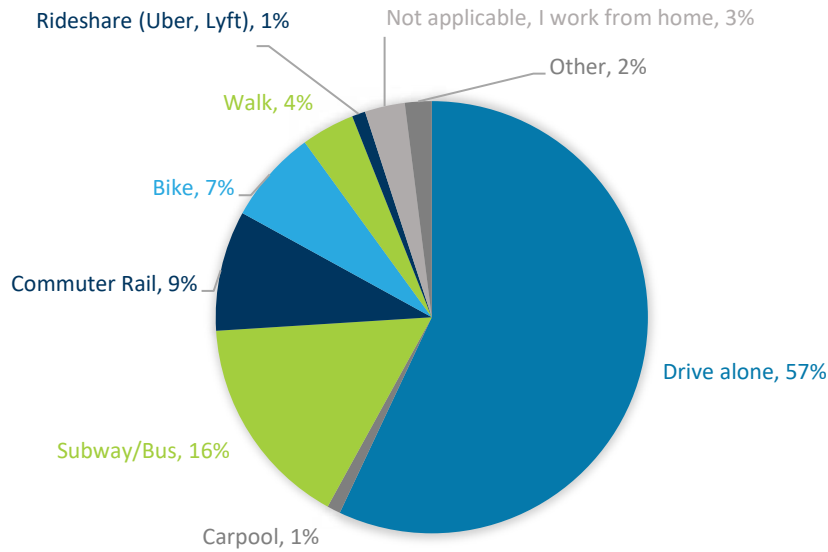
- 50% of respondents said they would consider changing jobs if it would provide a better commute, down from 60% in 2019.
- 16% of respondents have considered moving to a different state within the last year to obtain a better commute, down from 23% in 2019.

Appendix

Over the course of a week, which of the following means of transportation do you use to get to/from work? (Check all that apply.)



What is your primary means of transportation to/from work?



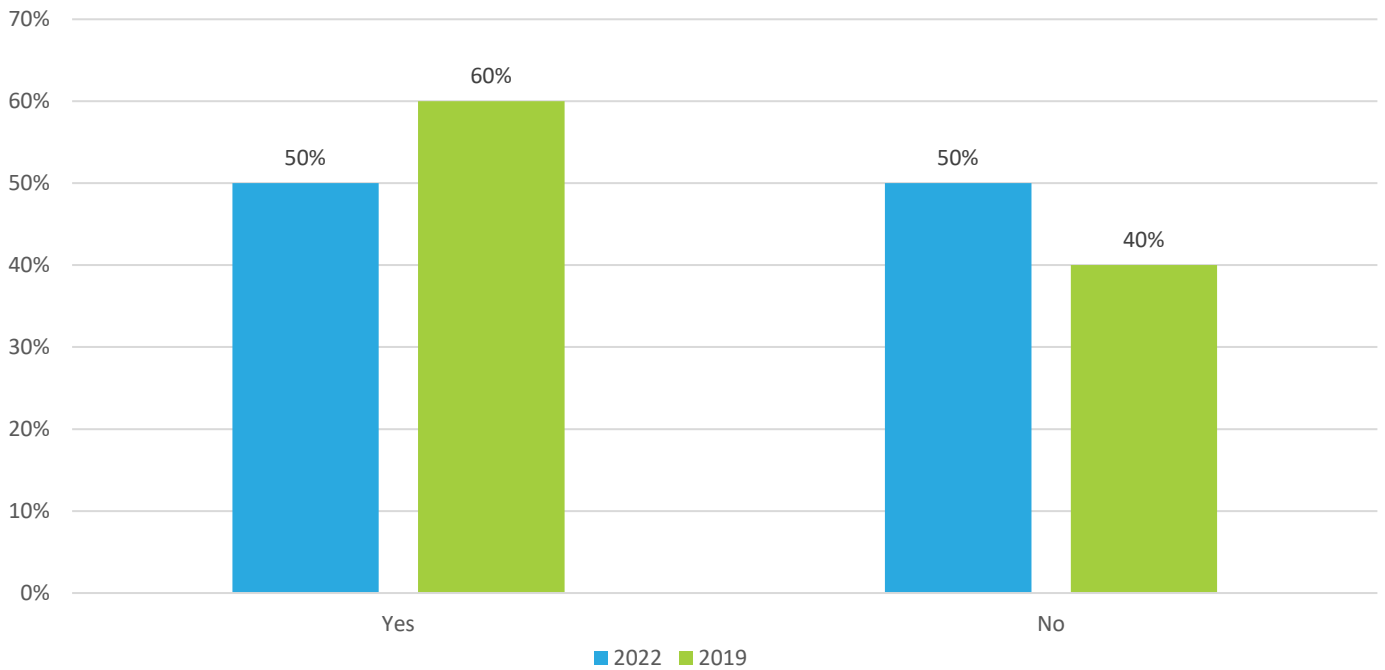
| 2022 | |
|------|------------------------|
| 57% | Drive alone |
| 16% | Bus/subway |
| 9% | Commuter rail |
| 7% | Bicycle |
| 4% | Walk |
| 1% | Carpool |
| 1% | Rideshare (Uber, Lyft) |

| Before COVID-19 pandemic (according to 2022 respondents) | |
|---|----------------|
| 48% | Drive alone |
| 21% | Bus/subway |
| 11% | Commuter rail |
| 5% | Bicycle |
| 5% | Walk |
| 2% | Carpool |
| 2% | Work from home |

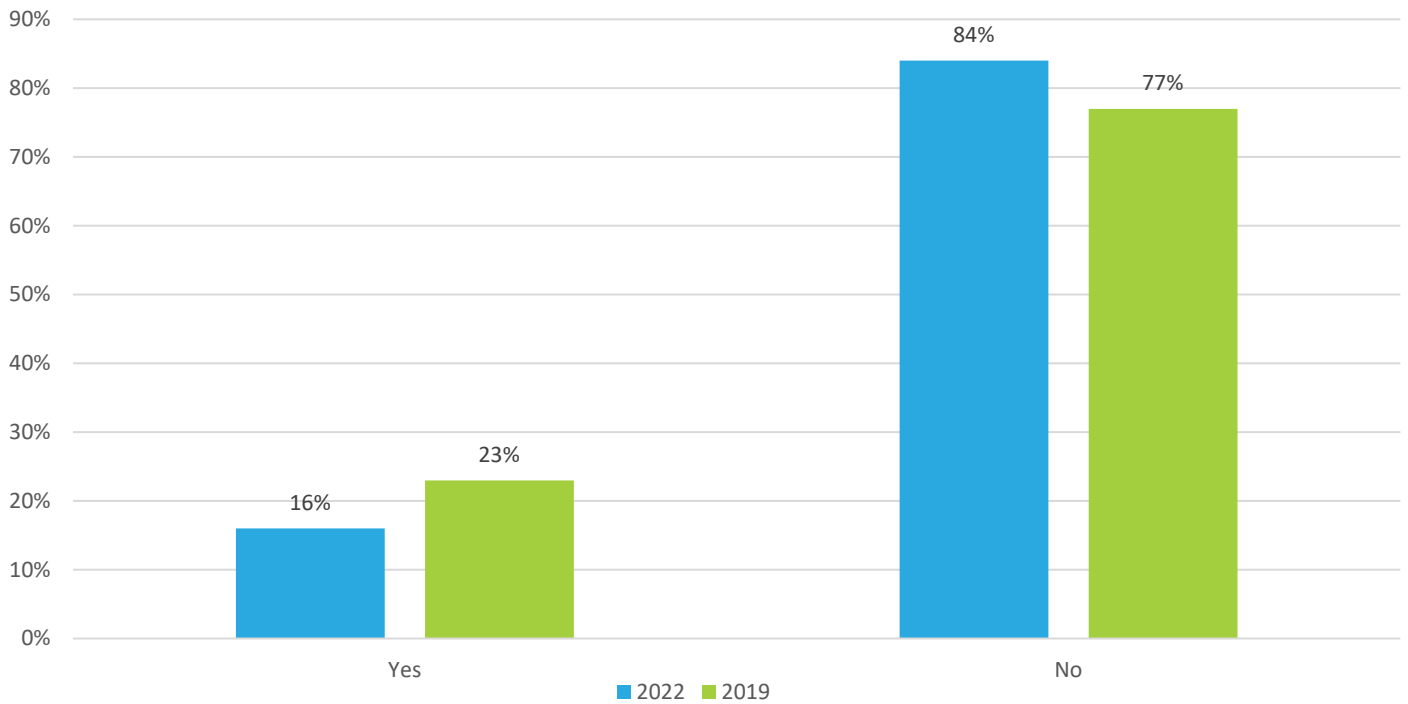
| 2019 | |
|------|--------------------------|
| 44% | Drive alone |
| 26% | Bus/subway |
| 15% | Commuter rail |
| 4% | Bicycle |
| 4% | Walk |
| 2% | Carpool |
| 2% | Employer shuttle van/bus |

All other options less than 1%

Would you consider changing jobs if it would provide you with a better commute?



Within the last year, have you considered moving to a different state to obtain a better commute?



For those who drive alone as their primary means of transportation to/from work

What are the reasons you choose to drive instead of choosing an alternative?
(Check all that apply.)

| | |
|---|-----|
| Driving is faster than the alternatives | 59% |
| Public transit is too unreliable | 40% |
| Public transit schedules do not work with my work schedule | 34% |
| Public transit is not available where I live/work | 32% |
| Personal commitments require a car before/during/after work | 30% |
| I need my car because I am a caregiver | 26% |
| Emergencies – if I need my car unexpectedly | 23% |

What incentive would be most likely to encourage you to use public transportation?

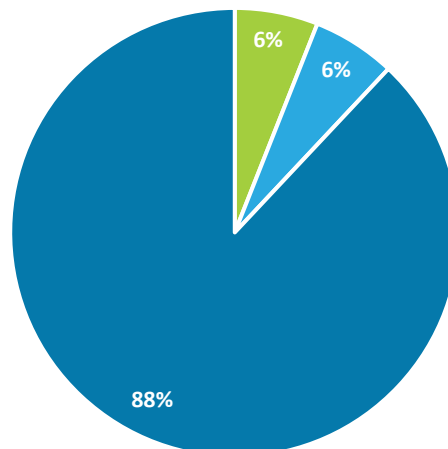
| | |
|--|-----|
| None | 35% |
| A free shuttle from the train station to work | 12% |
| Financial incentives from employer (e.g. cash bonus) | 9% |
| Work schedule flexibility | 8% |
| Fully paid public transportation pass | 6% |
| Discounted parking at commuter rail stations | 4% |
| Guaranteed ride home in an emergency | 3% |
| Other | 22% |



- "Better commuter rail timetable"
- "Improved safety on the T"
- "Reliability of service and staying on schedule"
- "Commuter rail should bring back express trains"
- "I only work 2 miles away from where I work; there currently are not sufficient sidewalks or paths that would enable me to ride my bike and/or walk"
- "A more direct MBTA route without transfers"
- "Commuter rail parking lots fill up too quickly"

Do you personally need electric-vehicle charging infrastructure at your workplace?

- Yes, my employer provides this
- Yes, but it is not provided by my employer
- No, I do not use an electric vehicle



For those who identified subway/bus or Commuter Rail as their primary means of transportation to/from work

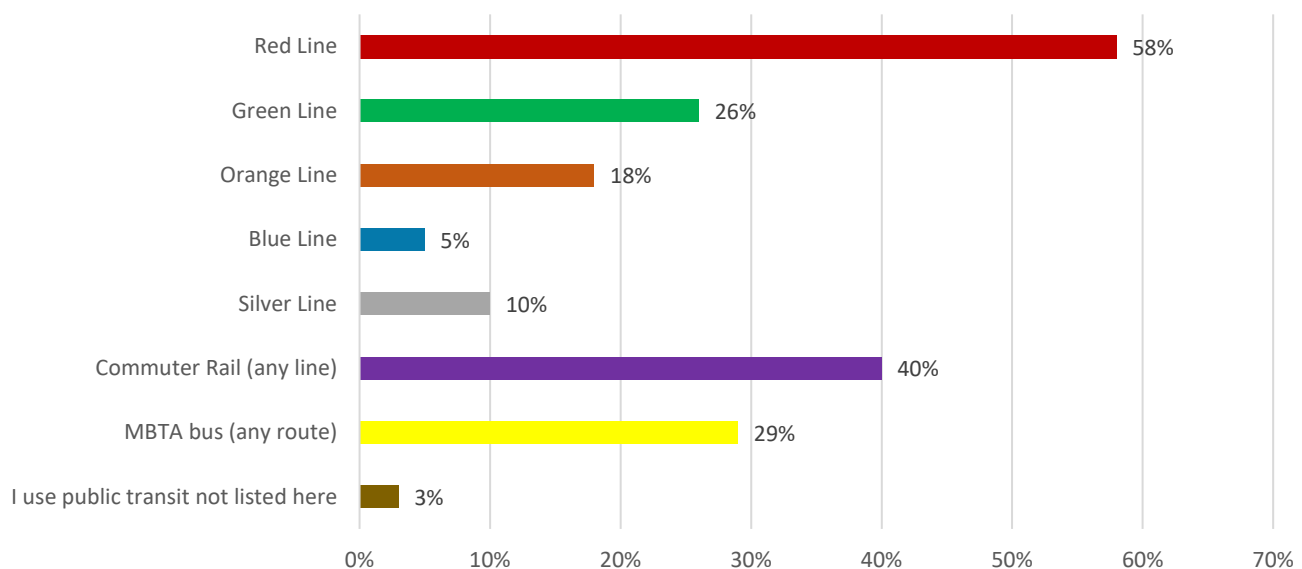
In the last month of taking public transportation, how many times has the following happened (if at all)?

| | Never | 1-2 times | 3-4 times | 5 or more times |
|---|-------|-----------|-----------|-----------------|
| Service 5 to 29 minutes late | 3% | 30% | 29% | 38% |
| Service more than 30 minutes late | 46% | 39% | 9% | 6% |
| Service cancelled | 70% | 21% | 4% | 4% |
| Service broke down while you were riding it | 68% | 25% | 6% | 1% |

In the past month, have delays on public transportation caused you any of the following? (Check all that apply.)

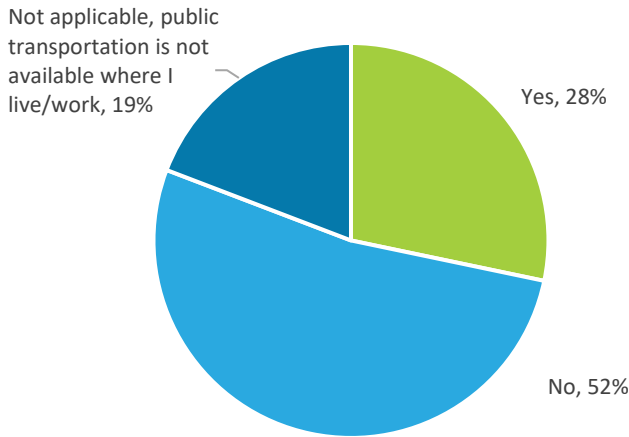
| | |
|--|-----|
| Become stressed, angry, or frustrated | 71% |
| Leave earlier to build in extra time | 71% |
| Be late for work | 61% |
| Be late for personal commitments after work | 57% |
| Be forced to spend money on out-of-pocket alternative transportation (e.g. Uber, Lyft) | 36% |
| Have lost wages | 1% |
| Other | 3% |

Which MBTA lines do you use most frequently? (Check all that apply. Include lines with suspended service that you would otherwise use.)

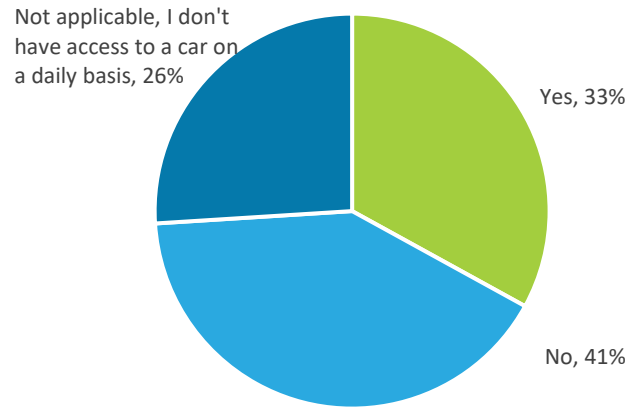


Comparing commutes by car and by public transit

In the last year, have you considered switching from driving to taking public transportation?



In the last year, have you considered switching from taking public transportation to driving to work?



Commuting patterns

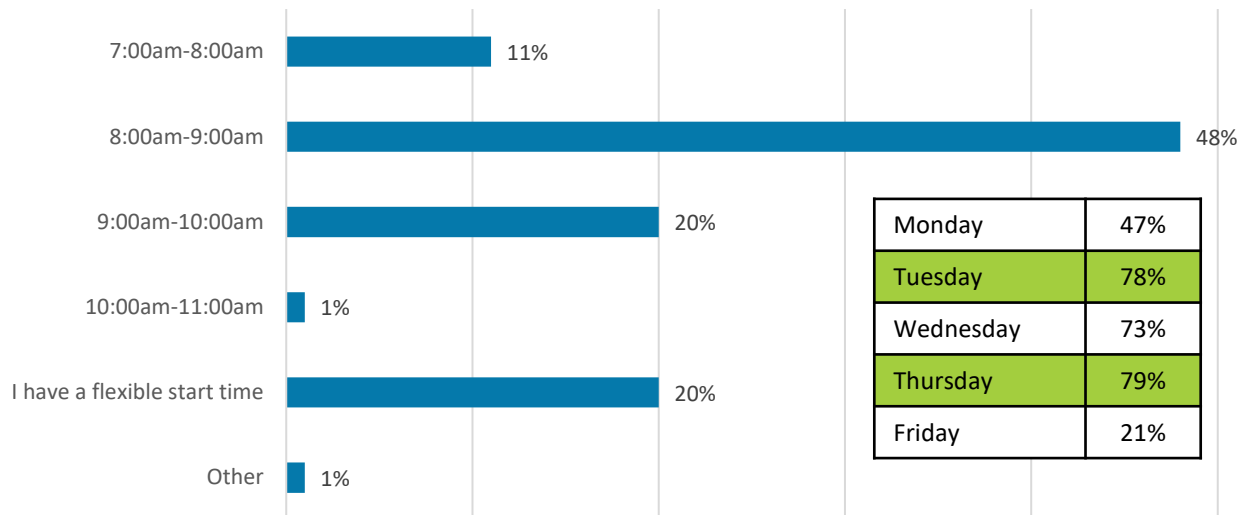
How long does your typical commute take, door to door?

| Time | 2022 | 2019 |
|--------------------|------|------|
| 15 minutes or less | 6% | 4% |
| 16-30 minutes | 17% | 15% |
| 31-45 minutes | 21% | 20% |
| 45-60 minutes | 24% | 22% |
| 61-90 minutes | 23% | 27% |
| Over 90 minutes | 8% | 12% |

How would you describe your commute?

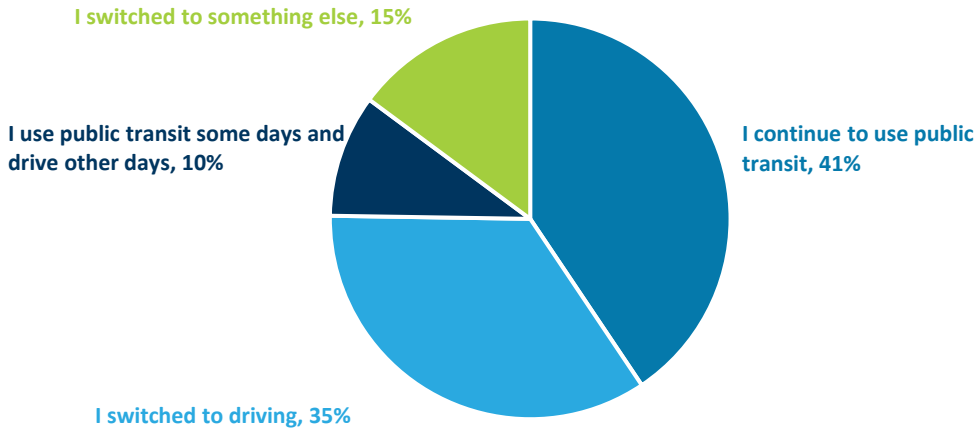
| | 2022 | 2019 |
|----------------------------|------|------|
| Very easy | 6% | 4% |
| Easy | 21% | 15% |
| Neither easy nor difficult | 38% | 34% |
| Difficult | 25% | 34% |
| Very difficult | 10% | 12% |

What time of day are you expected to begin work (either in the office or from home)? Which days are you typically in the office?

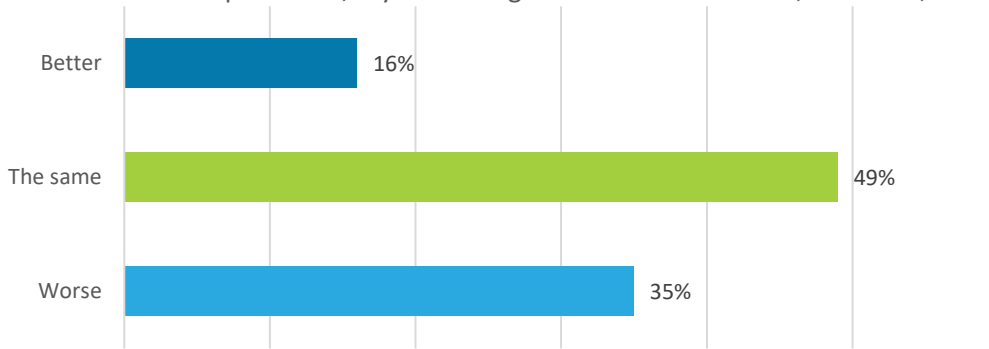


Impacts of COVID-19

If you used public transit BEFORE the COVID-19 pandemic, did you continue using public transit or did you switch to driving?



Compared to BEFORE the COVID-19 pandemic, is your average commute now better, the same, or worse?



Employer subsidies

Does your employer subsidize parking at your place of work? Does your employer subsidize your public transportation costs?

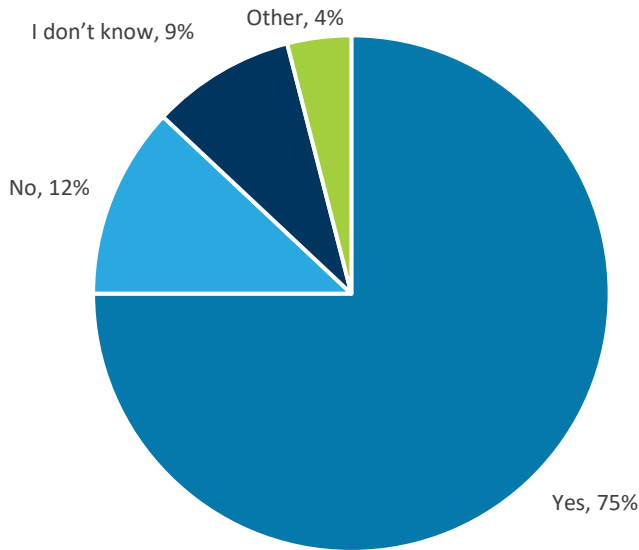
| Subsidy | Parking | Public Transportation |
|------------------------------|---------|-----------------------|
| Yes, they pay for all of it | 40% | 65% |
| Yes, they pay part of it | 26% | 23% |
| No | 8% | 9% |
| I don't know | 1% | 2% |
| Parking is free where I work | 25% | |

Within the last year, has your employer instituted any new policies that have the potential to ease employees' commuting burden? (Check all that apply.)

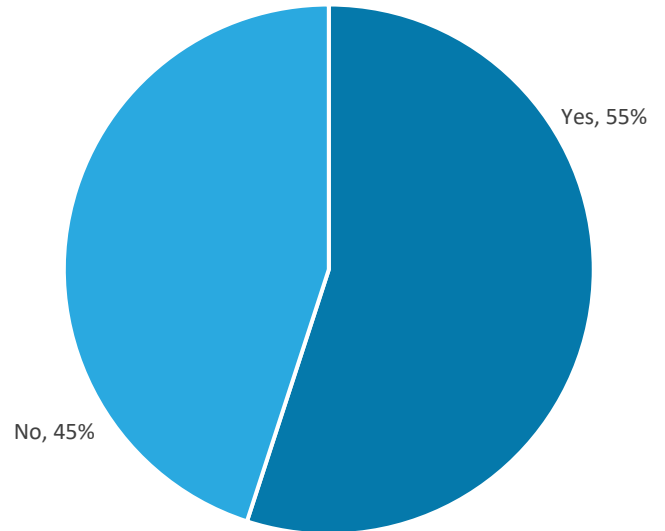
| | |
|---|-----|
| Allowed for flexible work hours | 34% |
| Instituted a work-from-home policy | 29% |
| Incentivized the use of public transportation | 11% |
| No | 26% |
| Policies like these have existed at my company for more than a year | 40% |
| Other | 5% |

Work-from-home policies and preferences

Does your employer offer flexible hours?



Would you consider changing jobs if it would provide a more flexible work-from-home policy?



Does your employer have a work-from-home policy?

| | |
|--|-----|
| No, employees are required to be in the office full-time | 9% |
| Yes, employees are allowed to work-from-home up to 1 day per week | 7% |
| Yes, employees are allowed to work-from-home up to 2 days per week | 19% |
| Yes, employees are allowed to work-from-home up to 3 days per week | 16% |
| Yes, employees are allowed to work from home up to 4 days per week | 9% |
| Yes, employees are allowed to work-from-home full-time | 17% |
| Other | 23% |

How many days per week would you ideally like to work in the office?

| | |
|---|-----|
| Not applicable, my role requires me to be in the office full-time | 12% |
| I would like to work in the office 5 days per week | 7% |
| I would like to work in the office 4 days per week | 14% |
| I would like to work in the office 3 days per week | 25% |
| I would like to work in the office 2 days per week | 20% |
| I would like to work in the office 1 day per week | 10% |
| I would like to work-from-home full-time | 9% |
| Other | 3% |

How many days do you typically work from home?

| | |
|-------------------------|-----|
| I do not work from home | 33% |
| 1 day | 17% |
| 2 days | 20% |
| 3 days | 18% |
| 4 days | 7% |
| 5 days | 4% |

Demographics of respondents

| Zip Code | Rate | Municipality/Neighborhood |
|----------|------|-------------------------------|
| 02139 | 20% | Kendall Square, Cambridgeport |
| 02142 | 14% | MIT (Boston) |
| 02210 | 11% | Seaport (Boston) |
| 02115 | 8% | Longwood (Boston) |
| 02140 | 4% | North Cambridge |
| 02141 | 4% | East Cambridge |
| 02472 | 3% | Watertown |
| 02421 | 3% | Lexington |
| 02451 | 3% | Waltham |
| 01730 | 3% | Bedford |

The chart to the left shows the top 10 zip codes where respondents to the 2022 survey work

- 20% of those who completed the survey work in Kendall Square and Cambridgeport in Cambridge.
- 74% of those who completed the survey work in the top 10 municipalities. In 2019, 77% of those who completed the survey worked in the top 10 municipalities.
- 82 zip codes were represented across the 1,338 individuals who completed the survey.

| Zip Code | Municipality/Neighborhood |
|----------|-------------------------------|
| 02144 | Tufts (Somerville) |
| 02155 | Medford |
| 02139 | Kendall Square, Cambridgeport |
| 02472 | Watertown |
| 02143 | Prospect Hill (Somerville) |
| 02135 | Brighton (Boston) |
| 02474 | Arlington |
| 02140 | North Cambridge |
| 01760 | Natick |
| 02145 | Winter Hill (Somerville) |

The chart to the left shows the top 10 zip codes where respondents to the 2022 survey live

- The top 10 zip codes are home to 18% of those who completed the survey. In 2019, this rate was almost the same with 19% of those who completed the survey living in the top 10 zip codes.
- Over 250 unique zip codes were represented among the 1,338 individuals who completed the survey.

Age distributions of respondents to the 2022 survey (in blue) and the 2019 survey (in green).

