

# 2016 Employer Benchmarking Survey

**DECEMBER 2016**

CONDUCTED ON BEHALF OF  
**BEST WORKPLACES FOR COMMUTERS<sup>SM</sup>**  
AND  
**THE ASSOCIATION FOR COMMUTER TRANSPORTATION**

PHILIP L. WINTERS  
DIRECTOR, TDM PROGRAM  
CENTER FOR URBAN TRANSPORTATION RESEARCH  
UNIVERSITY OF SOUTH FLORIDA

AND

WENDY SCHOLTZ, CHAIR  
ACT EMPLOYER COUNCIL

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## Acknowledgments

First, we give special thanks to members of the Association for Commuter Transportation's Employer Council who assisted in the review and comment on the survey drafts: Wendy Scholtz (Chair), Tom Harrington, Joe Cox, Jude Miller, Ken Jarocki and Pinky Advani. Their feedback was very valuable in drafting the survey and reviewing the draft final report.

Next, we extend a big thanks the group of employers who responded to questions in the 2016 Employer Benchmarking Survey.

Finally, we thank Center for Urban Transportation Research's Austin Gible for compiling the draft results and to Sara Hendricks for assisting in the final report preparation. Their assistance would not have been possible without the financial support of the National Center for Transit Research at the University of South Florida.

## Introduction

The following pages illustrate the findings of the 2016 Employer Benchmarking Survey conducted and analyzed by the Center for Urban Transportation Research (CUTR) in the Spring/Summer of 2016. This 2016 Employer Benchmarking Survey is designed to gain an understanding of how employers view employee commute programs, how these programs are conducted and managed, and how employers view the future of employee commute programs and their impacts on their respective organizations. In the following pages, key findings are summarized and illustrated through the use of charts and graphs.

## Methodology

The 2016 Employer Benchmark Survey was conducted using a voluntary online survey developed by CUTR and representatives of the Association for Commuter Transportation (ACT) Employer Council. This survey was then emailed to organizations with 100+ employees. The survey also was distributed through the TRANSP-TDM listserv, Best Workplaces for Commuters<sup>SM</sup> (BWC), and ACT members. ACT also reached out to individual transportation management associations (TMAs) and ridesharing organizations around the United States and Canada. A total of 76 usable responses were received and were then stratified by the employee population size of each employer. Survey results have been disseminated by ACT and BWC. Through these results, employers can learn what other organizations are doing and where their organization's employee commuter program stands in relation to others. Employers also were able to request additional personalized analysis of their organization's data compared to other employers of similar size. All employer participants remained anonymous.

There are some limitations to the above methodology. The risk of self-selection bias is present. Disclosure concerns limited some participation, and confidentiality of response limited some analysis (e.g. by type of employer, location, etc.). Survey participants were not asked to provide program cost data to reduce a barrier of participation.

## Respondent Overview

Figures 1 and 2 categorize all 76 respondents by employee population size and industry type. There was a relatively even distribution of respondents by employee population size. The "Other" industry type included professional, scientific, and technical services, public administration, and educational services, and health care. Among the 76 respondents, three employers were from Canada, and the remaining employers were from the USA. It is important to note a distinction in the terminology used in this report. While the survey responses represent employers, and the data are presented as such, this survey focused on the workplace or multiple workplaces and not necessarily all locations of a particular employer. For example, Employer A may offer different TDM strategies in their workplace in Tampa versus their other operation in Atlanta. It also may be the case that managers of office parks may manage TDM programs for two or more employers located within the office park. Examples of this are the Best Sites honored by Best Workplaces for Commuters.

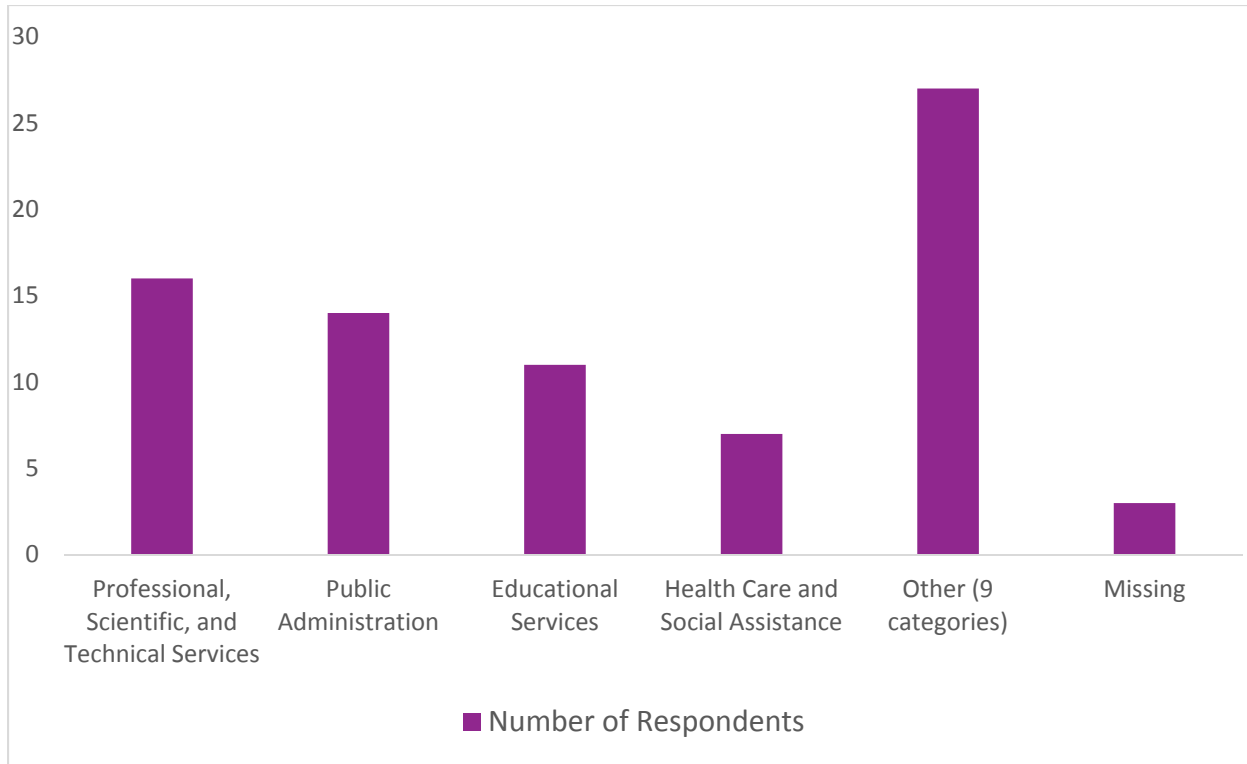


Figure 1 - Respondents by Industry Type

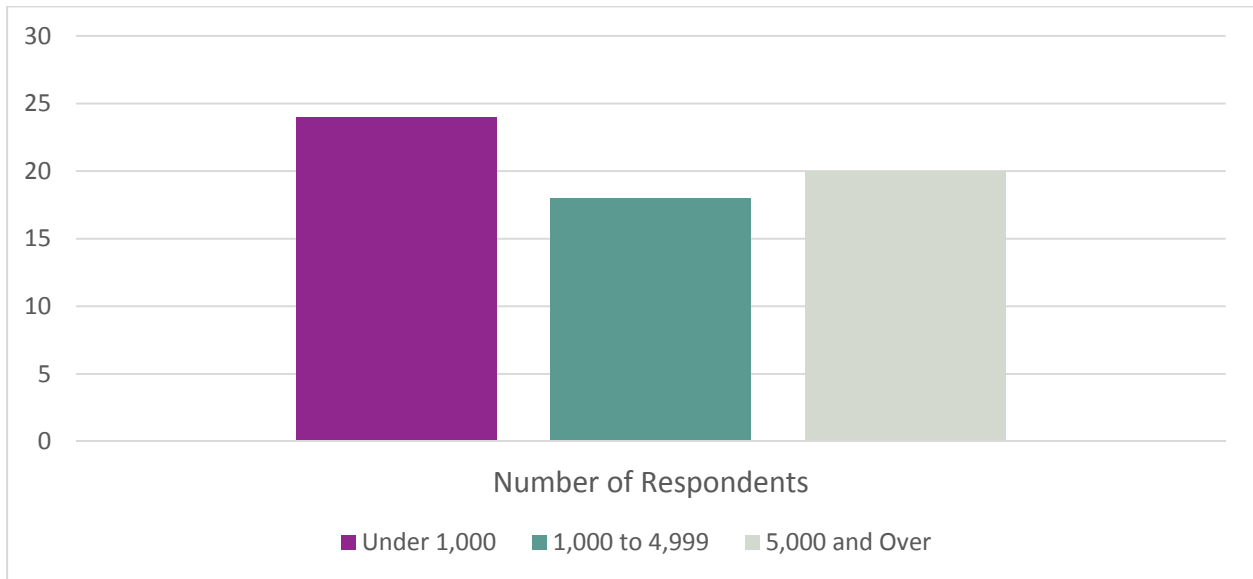


Figure 2 - Number of Respondents by Employee Population Size

## Program Management

### How Employee Commuter Services Programs are Structured

Overall, 50 percent of survey respondents reported that their TDM programs are managed in-house by Facilities Planning/Parking Departments. Figure 3 illustrates the distribution of TDM program management by different department types, according to employer size.

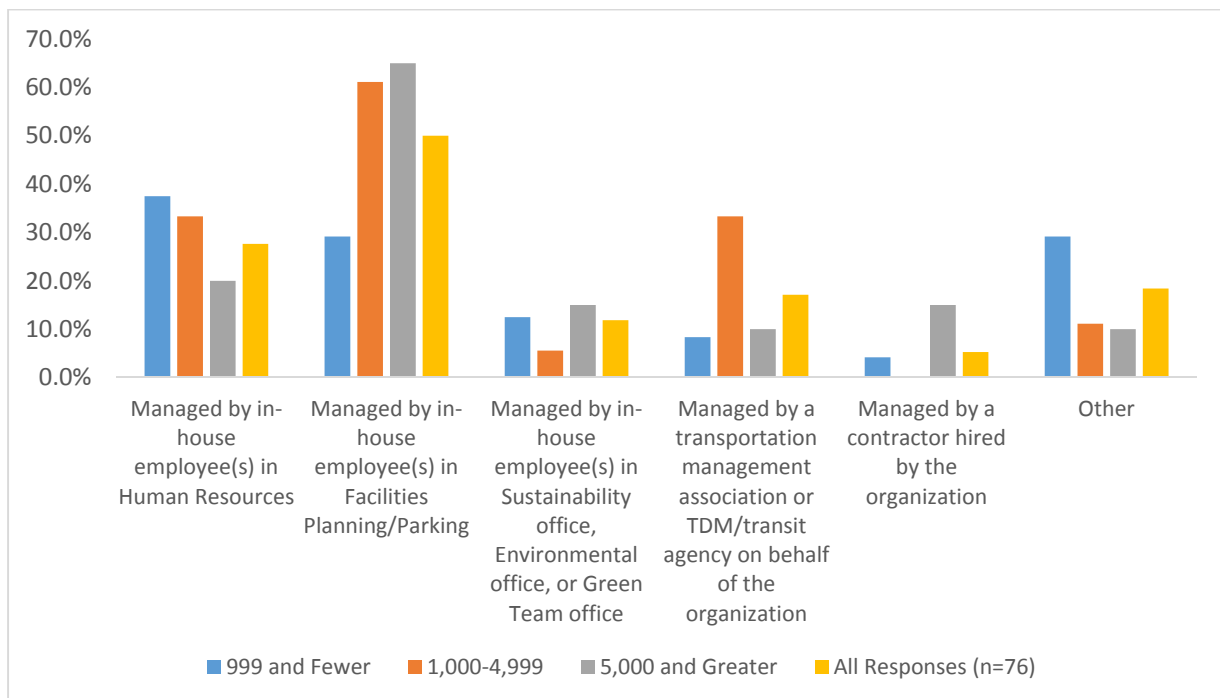


Figure 3 - How TDM Programs Are Managed

Approximately 70 percent of all survey respondents reported having a formal written policy for their commuter services programs.



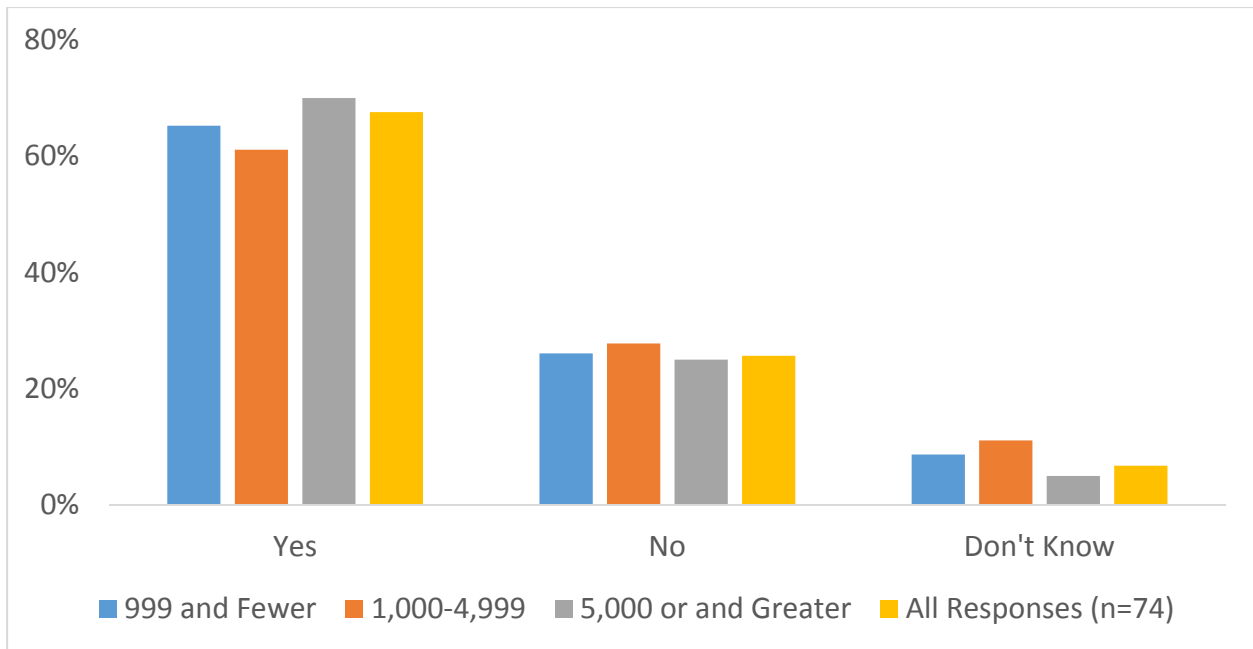


Figure 4 - Organizations with a Formal Written Policy on Commuter Services

With regard to the survey statement, “Our employees consider our commuter services and programs to be a valuable employee benefit”, 83 percent of smaller employers strongly agree/agree, 77 percent of medium size employers strongly agree/agree, and 88 percent of the largest employers strongly agree/agree. Overall, 81 percent of employers strongly agree/agree.

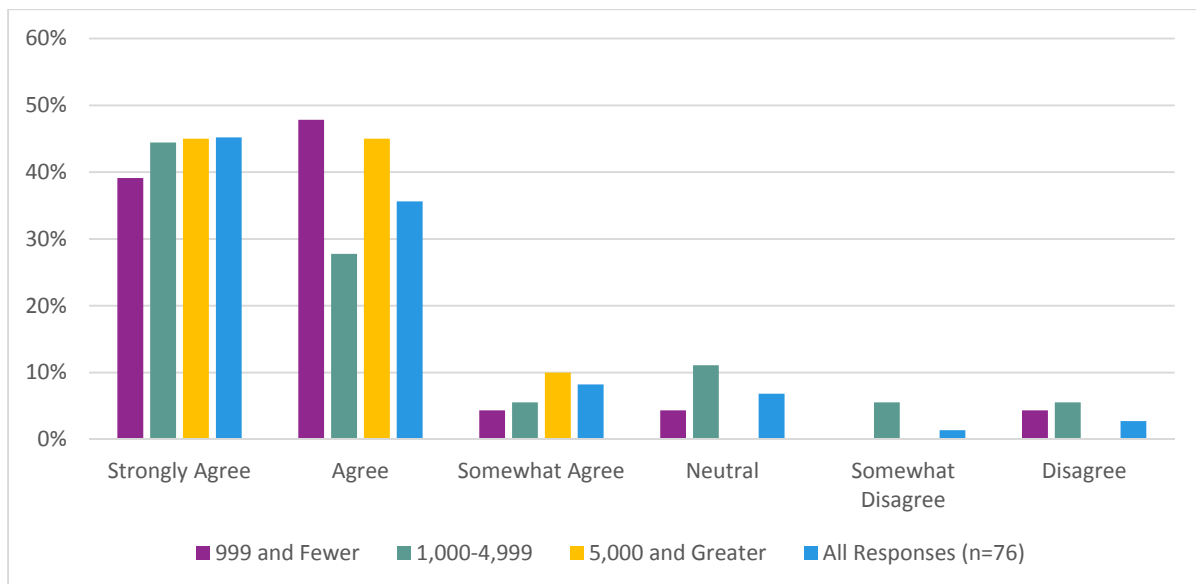


Figure 5 - "Our employees consider our commuter services and programs to be a valuable benefit"

## Motivations and Benefits Received

Overall, 60 percent of employers reported that decreasing traffic congestion motivated their commuter services programs, to a “very great extent”. In addition, over 50 percent of employers reported that meeting local and state regulations and reducing air pollution motivated their commuter services programs to a “very great extent.”

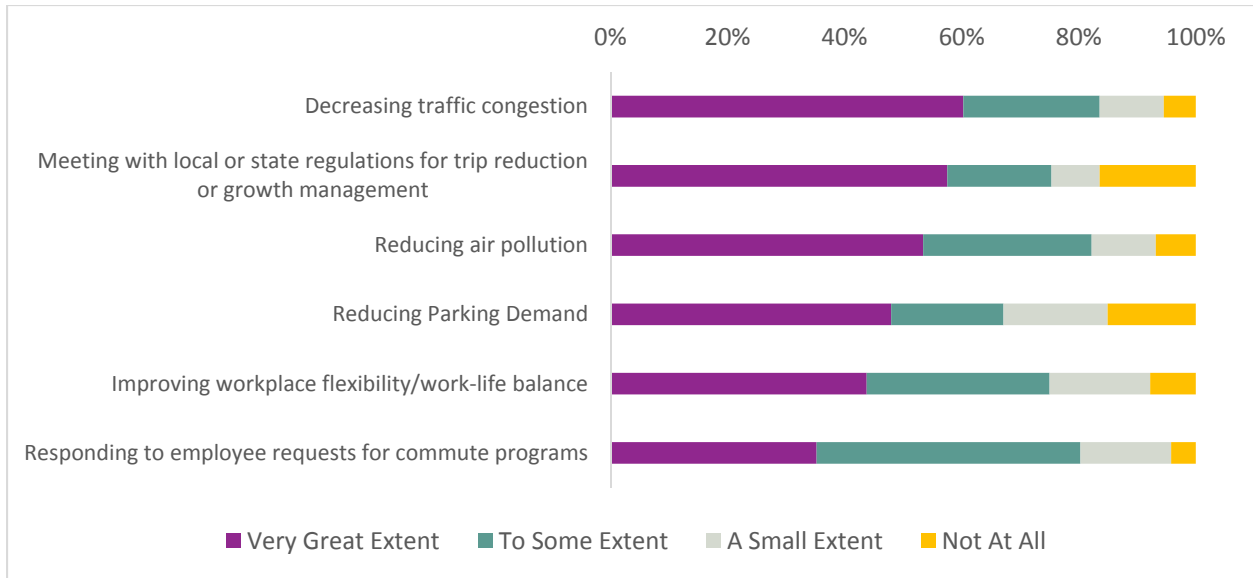


Figure 6 - Top Reasons for Operating an Employee Commute Program

Figure 7 below lists all the possible reasons for operating an employee commute program sorted by those topics receiving the largest share of “Very Great Extent” responses.

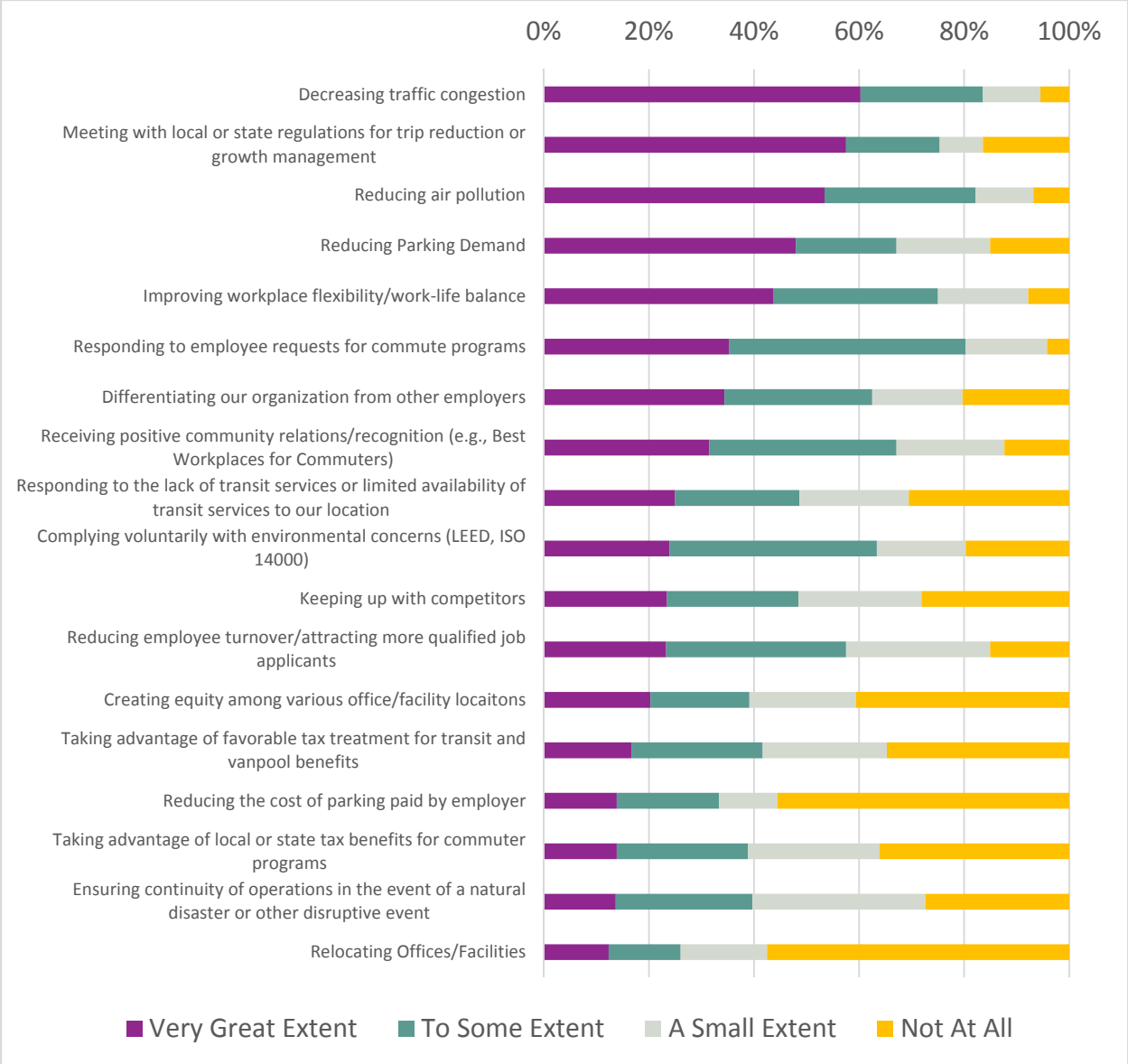


Figure 7 - Reasons for Operating Commute Program

With regard to organizational benefits derived from the commuter services programs, the majority of all employers reported a reduced demand for parking, an improved corporate image, and improved employee morale. These organizational benefits, as well as reduced onsite traffic congestion, appear to be derived somewhat more so by the largest employers.

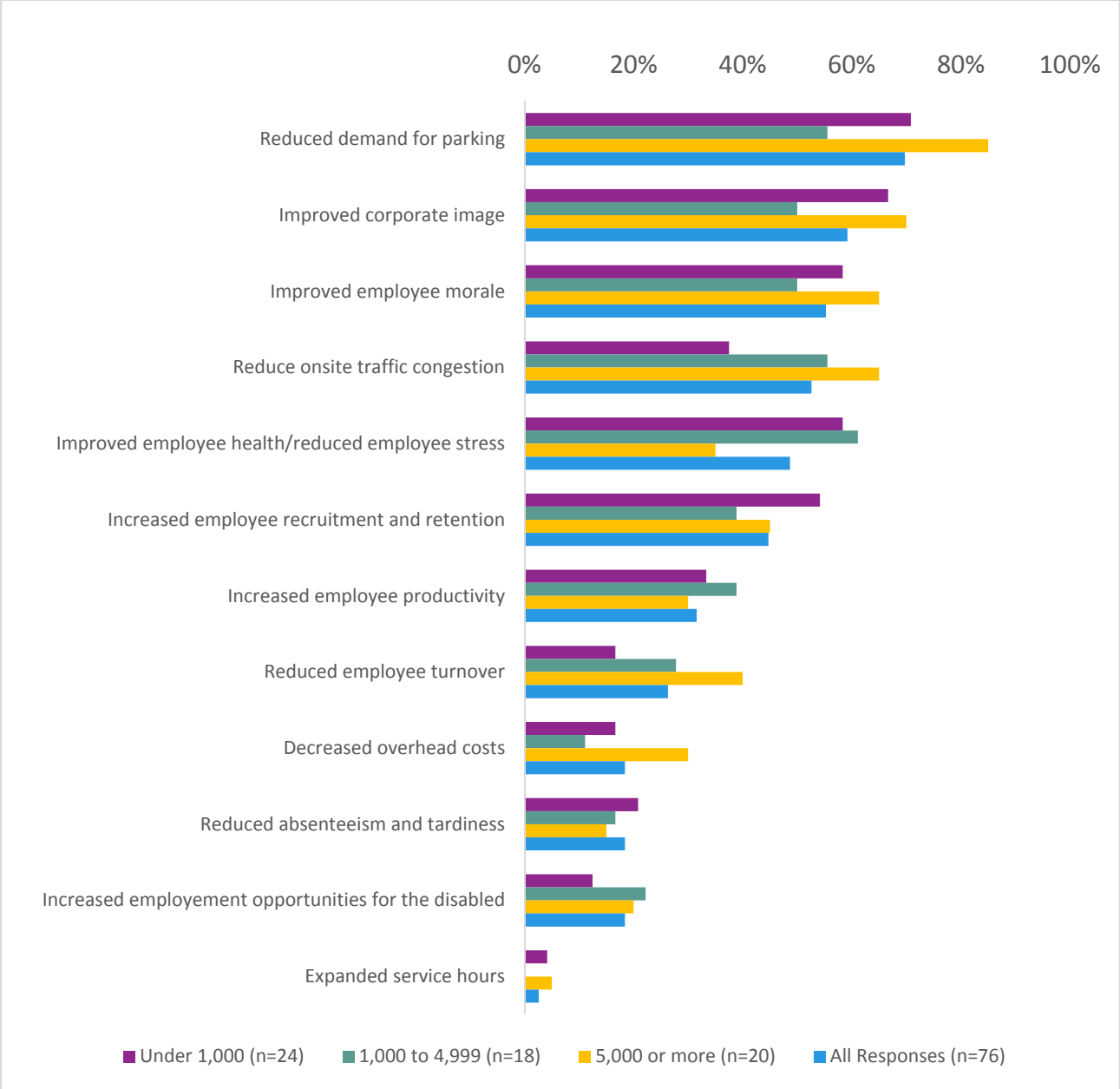


Figure 8 - Benefits Organizations Derive from Employee Commuter Services Programs

## Derived Benefits and Motivations

### Reducing Demand for Parking

The respondents' data revealed that motivations of employers to develop employee commuter services programs do not always align with the end results of their programs. Often employers recognized that they received more benefits beyond what they initially set out to achieve. For example, approximately 69 percent of the total survey respondents indicated that they derived benefits of reduced parking usage as a result of their employee commuter services programs. Employers accounting for 26 of these 69 percentage points were employers who enjoyed the benefit but were not initially motivated, motivated by a small extent or only motivated to some extent to provide an employee commuter program. Their programs were primarily motivated by other reasons.

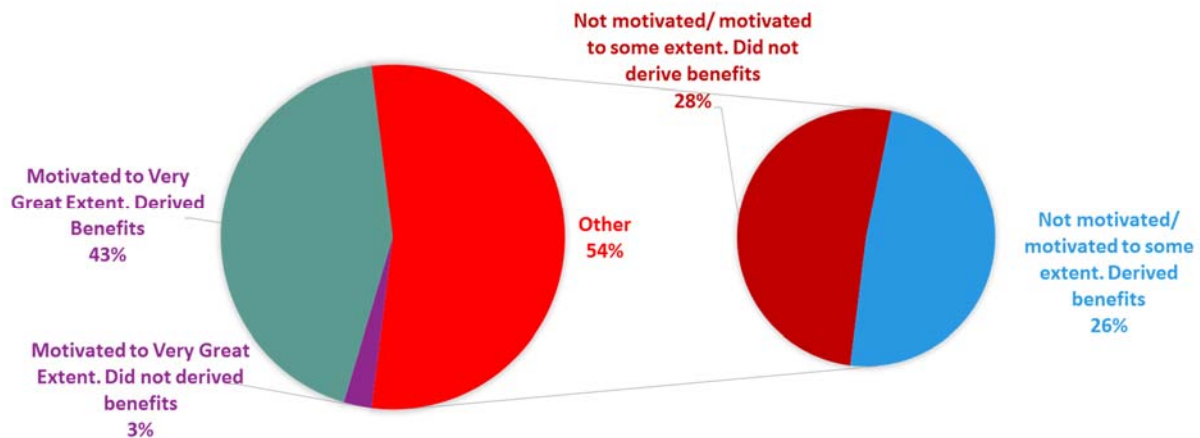


Figure 9 - Extent of Organization's Motivation for Employee Commute Program to Reduce Parking

### Decreasing Traffic Congestion

Likewise, for the benefit of decreased traffic congestion, 53 percent of employers indicated that they derived the benefit of decreased traffic congestion as a result of their employee commuter services program. However, as illustrated in Figure 37, 15 percent of these employers had not initially been motivated to create their program for this purpose.

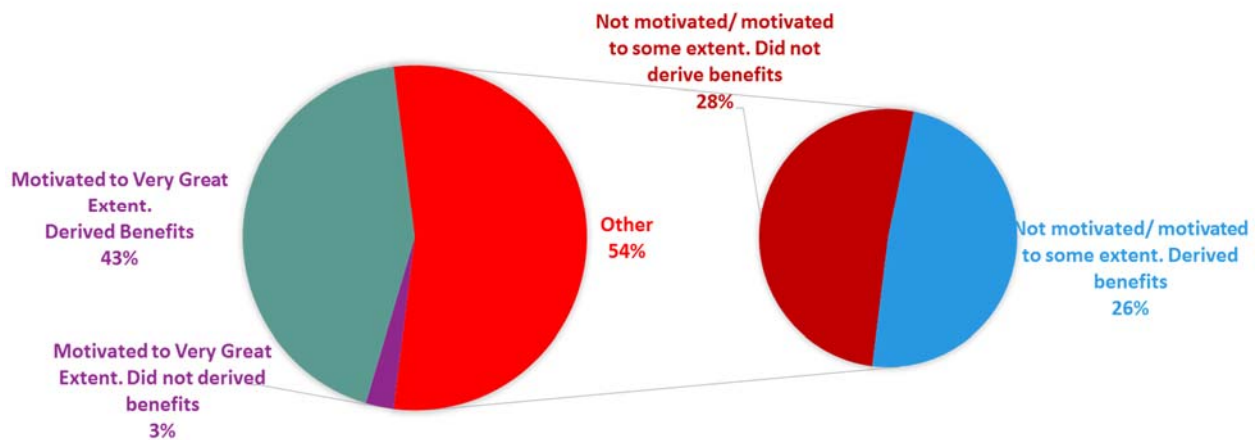


Figure 10 - Extent of Organization's Motivation for Employee Commute Program to Reduce Congestion

### Improving Community Relations

As a third example, for the benefit of improved community relations, 59 percent of employers indicated that they derived this benefit as a result of their employee commuter services program. However, as illustrated in Figure 10, 38 percent of these employers had not initially been motivated to create their program for this purpose.

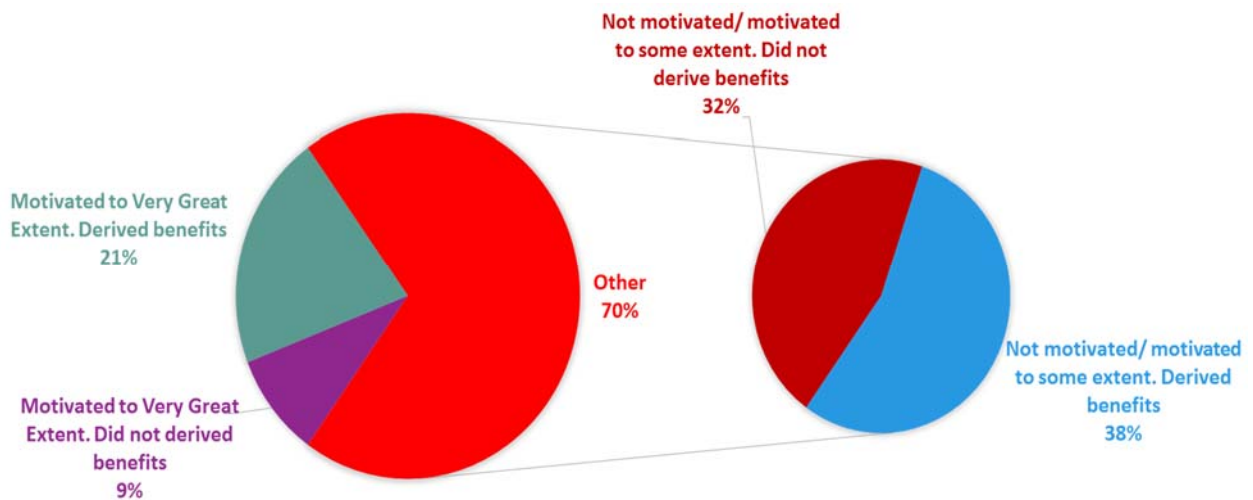


Figure 11- Extent of Organization's Motivation for Employee Commute Program to Improve Community Relations

What these three examples show is that in many cases, employers enjoy more benefits derived from their employee commuter services programs, than they had initially set out to achieve.

## Financial Incentives

Approximately 92 percent of survey respondents reported that their employers provide financial incentives/discounts and/or allow employees to use pre-tax income to pay for using an alternative to driving alone (i.e., bus, rail, vanpool, bicycle or walk). With regard to why organizations provide transit benefits for their employees, the top reasons are to comply with trip reduction ordinances, to satisfy requests of employees for transit benefits, and to recruit and retain employees. Medium size organizations were more likely to cite recruitment and retention as a top reason. The largest employers cited tax exemption for transit benefits and trip reduction ordinances as their top reasons.

As shown in Figure 12, overall about 13 percent of all survey respondents indicated that they provided transit benefits as the result of transit agency outreach. Over 50 percent of medium size organizations were motivated to provide transit benefits for recruitment and retention.

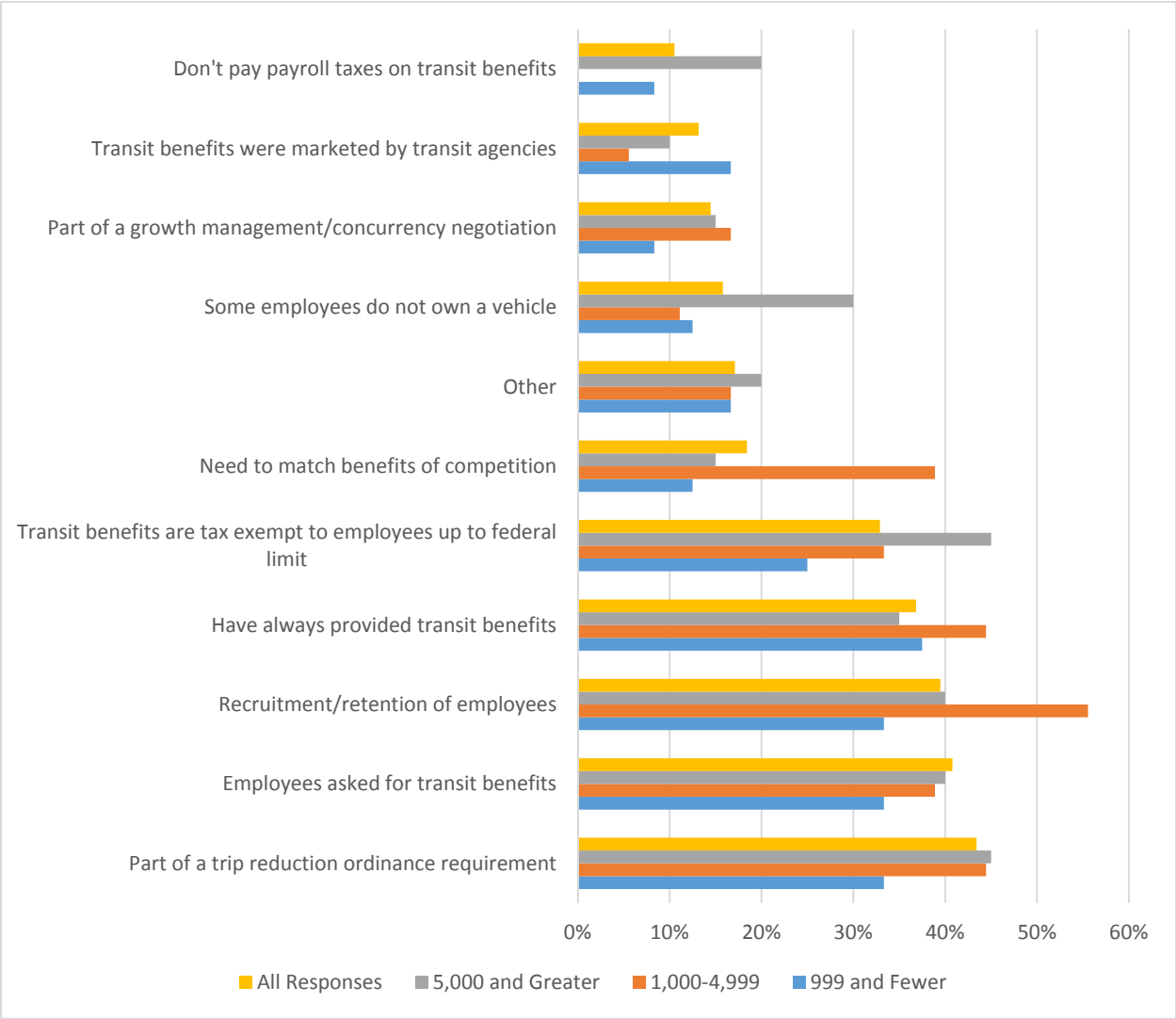


Figure 12 - Reasons for Providing Transit Benefits to Employees

Organizations use different policies with regard to delivering benefits that provide access to transit for their employees.

Figure 13 shows that large firms are more likely to allow employees to use pre-tax income to purchase their own transit passes. Medium sized organizations are more likely to purchase transit passes, tokens or cards and provide them to employees at no charge. Twenty percent of all employer respondents indicated that they are reimbursing employees for their transit expenses.

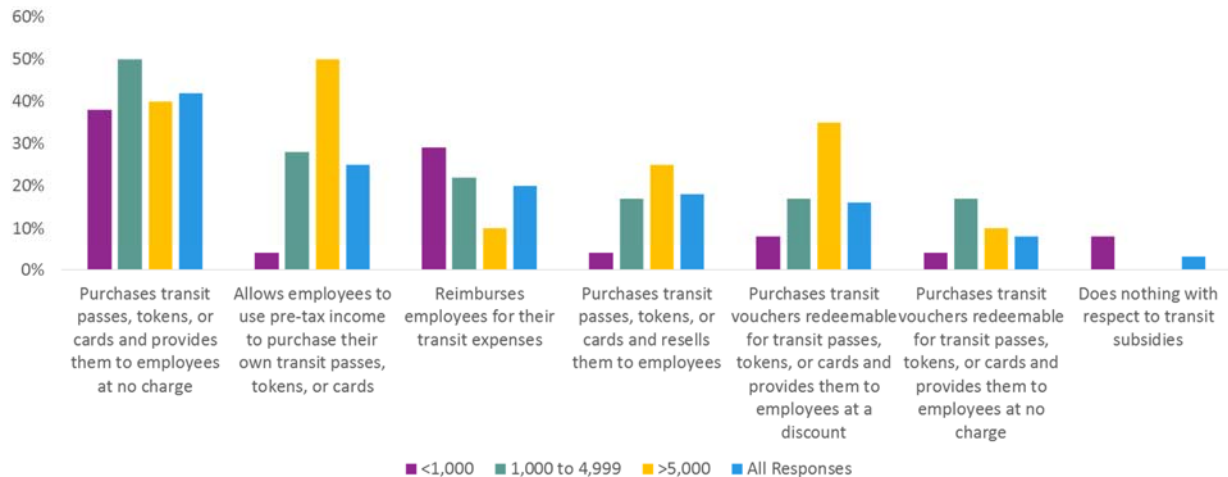


Figure 13 - How Organizations Provide Access to Transit Benefits

Nearly 73% of respondents offer vanpool financial incentives whereas only 51% provide these incentives for employee carpools. Under IRS’ Section 132(f) Qualified Transportation Fringe Benefits, most employers can offer employees who vanpool (referred to as commuter highway vehicles in the regulations) up to \$255 per month in tax-free subsidies. However, carpool financial incentives are treated as taxable income. (See Figure 14)



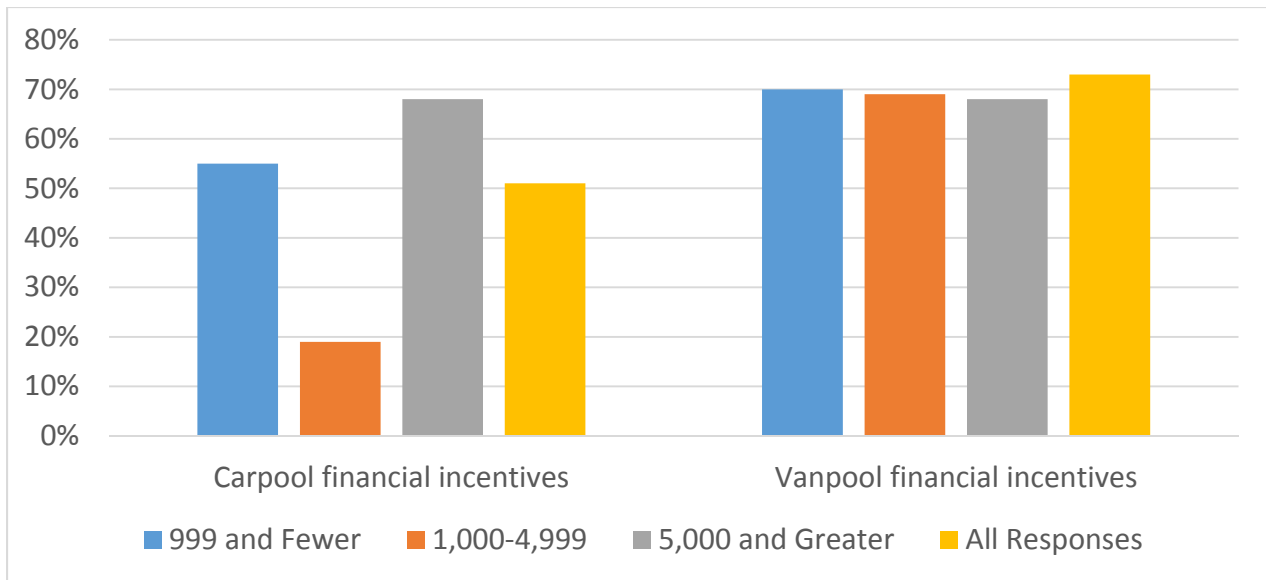


Figure 14 - Share of Employers Offering Carpool and/or Vanpool Financial Incentives

Employers also can provide financial incentives for bicycling and walking, including the following.

1. Bike-to-work subsidies/allowances/reimbursements
2. Walk-to-work subsidies/allowances
3. Bikeshare Memberships

Bike-to-work reimbursements are nontaxable. Only the largest employers offer bikeshare memberships.

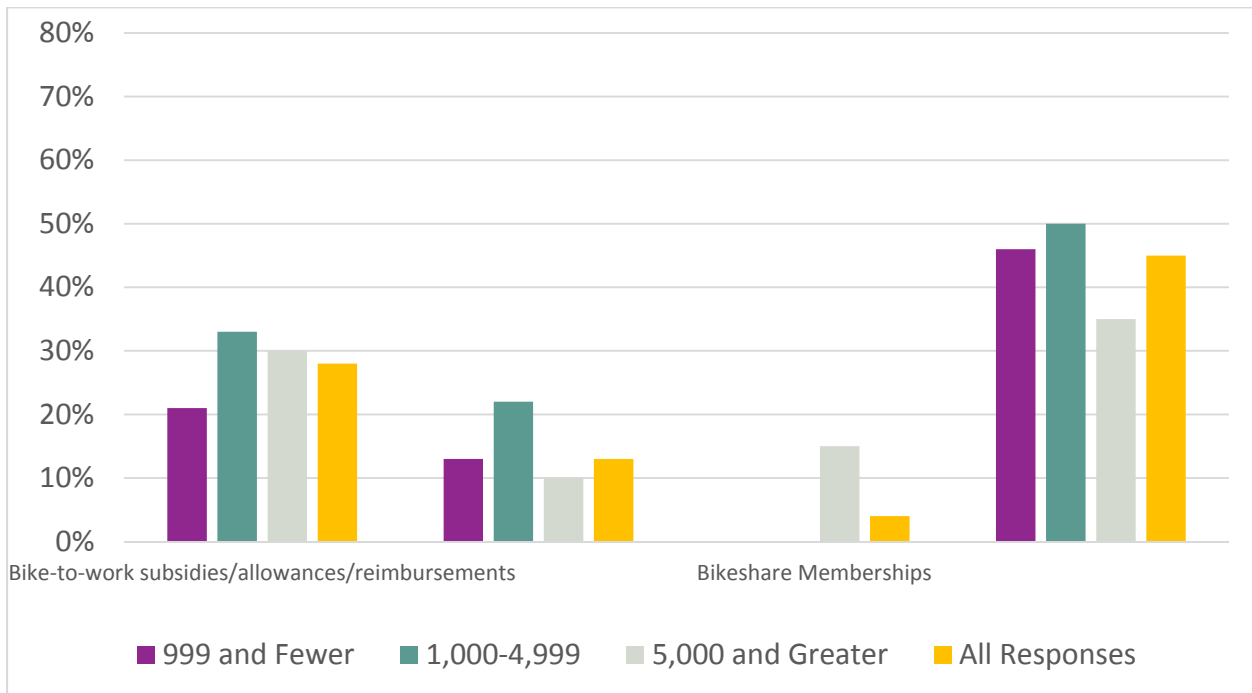


Figure 15 - Types of Bike or Walk Financial Incentives Provided by Employee Population

With regard to vanpool benefits, respondents as a whole were most likely to provide vanpool voucher or credits to employees at no charge. Allowing employees to use pre-tax income to pay their own vanpool fares is the arrangement most frequently mentioned for providing vanpool benefits. (Figure 16)

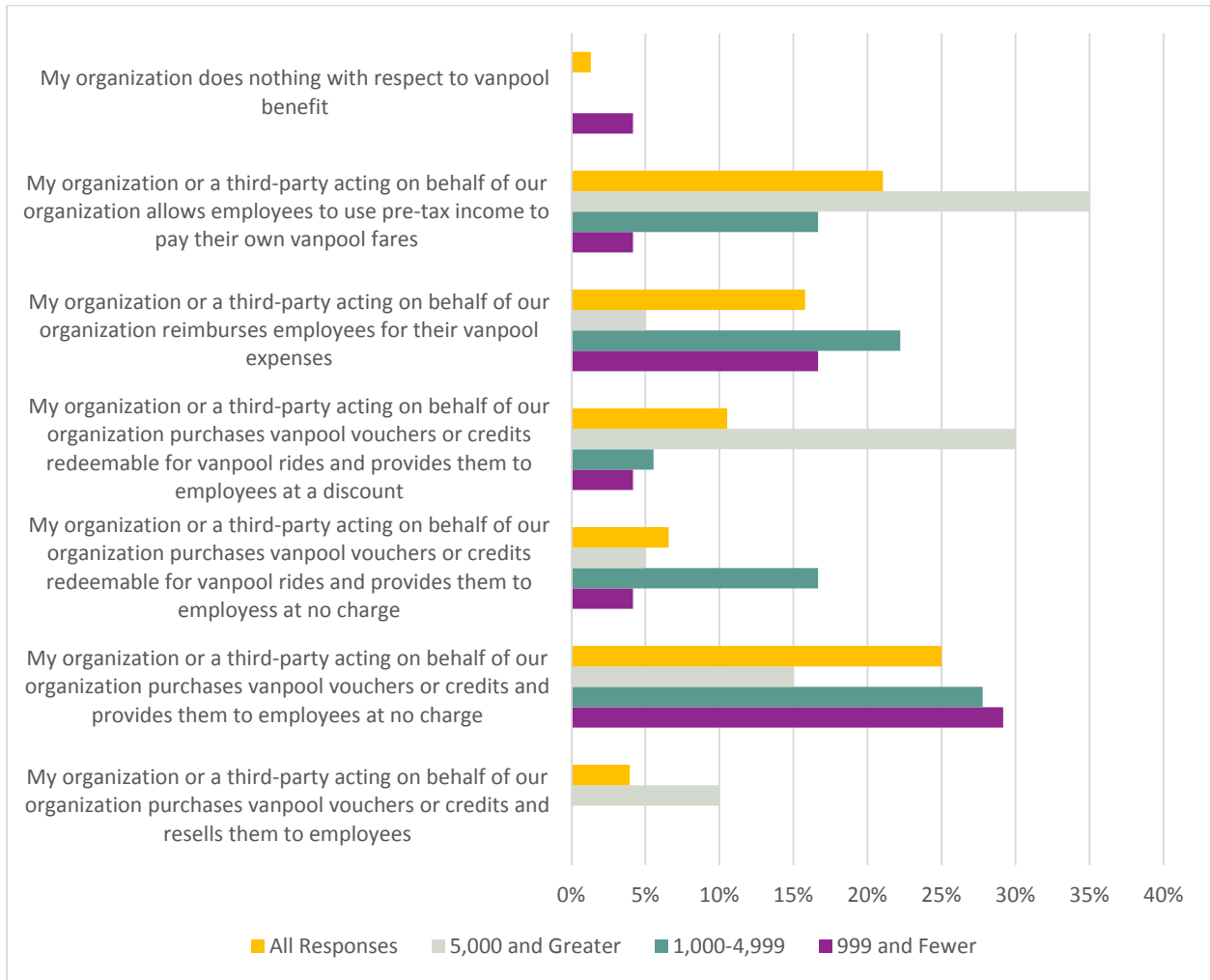


Figure 16 – How Organizations Provide Access to Vanpool Financial Benefits

More than 60 percent of employers provide parking spaces at no charge (See Figure 17).

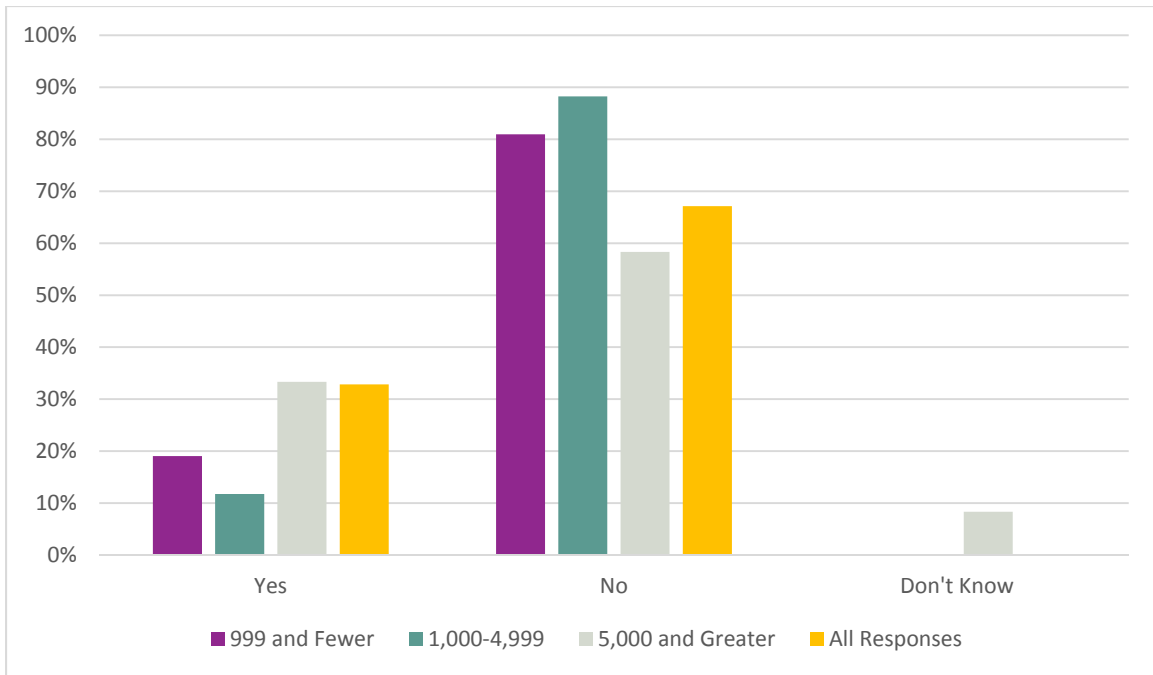


Figure 17 - Do Eligible Employees Pay Anything for Company-Owned or Leased Parking?

At over 50 percent of all organizations, not all employees pay the same amount per month for parking. (See Figure 18)

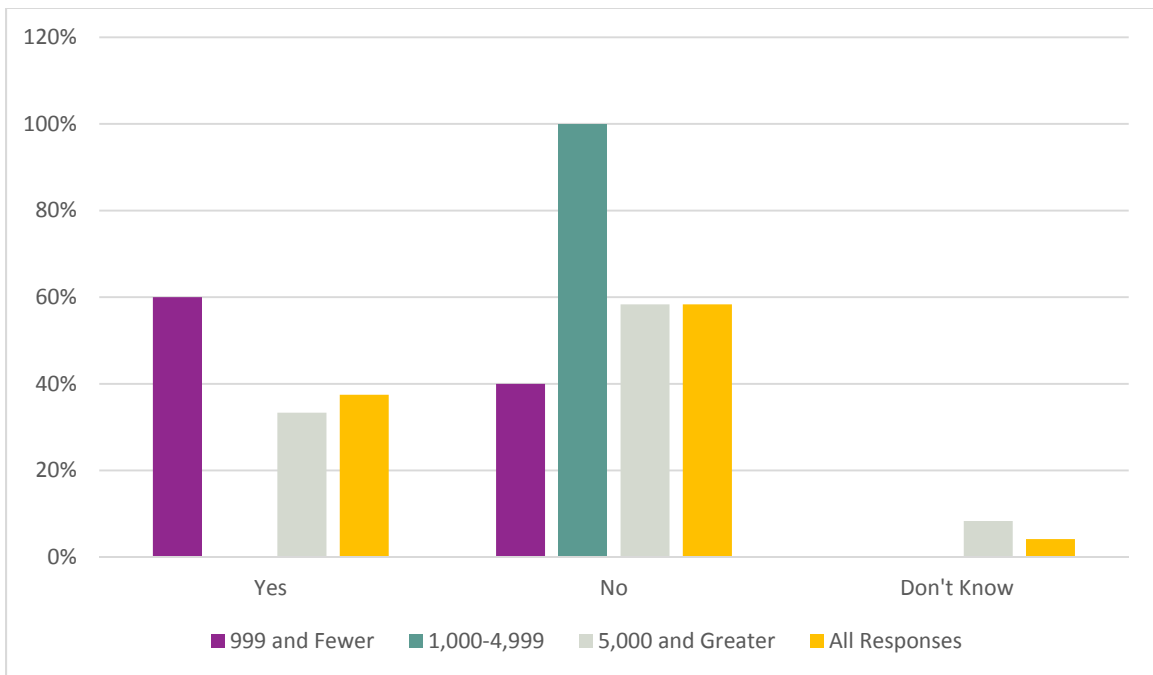


Figure 18 - For employee-paid parking, do all eligible employees pay the same amount per month for the parking spaces they use?

## Program Offerings

### Types of Transportation Infrastructure

Quality public transit services and premium transit services in the United States are often difficult to come by outside of major metropolitan areas, which is one of the many reasons employee commute programs are provided. Within the survey, respondents were asked to select one of four options that best describe public transit services available to employees at their facility. For all respondents, 49 percent attributed responding to the lack of transit service as one of the reasons for operating an employee commute program.

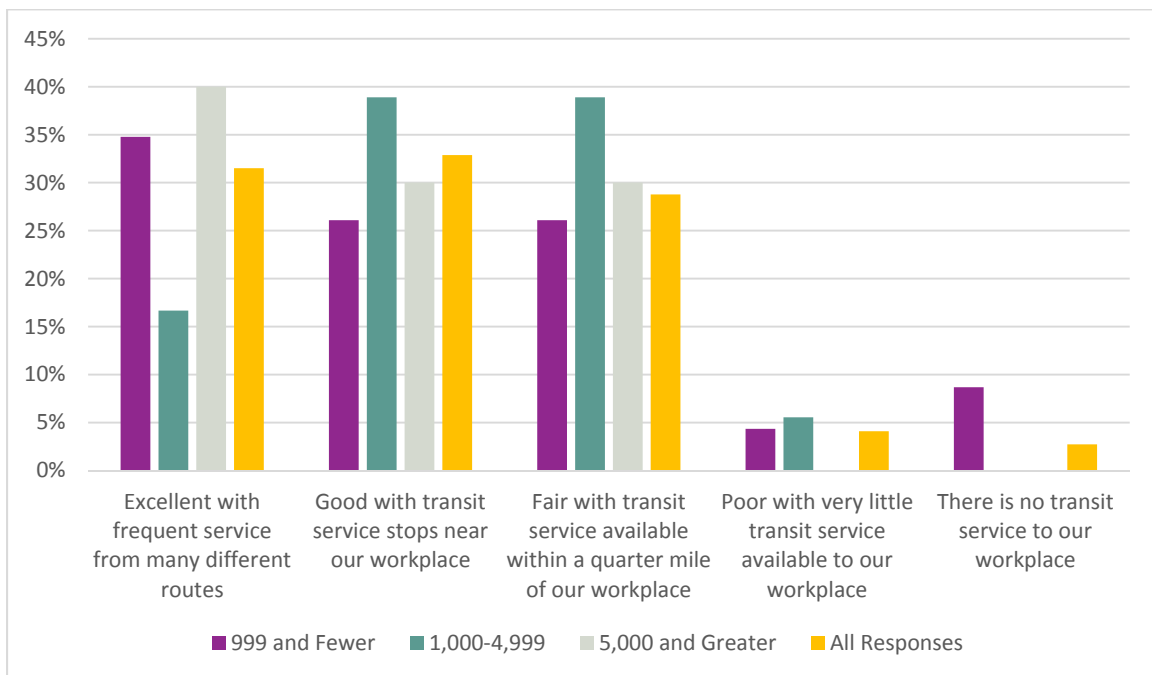


Figure 19 - Level of Public Transit Services Available to Employees

Interestingly, for employers overall, the top programs offered included infrastructure to support walking and bicycling. The top program offered by employers overall was on-site showers for cyclists, with 93 percent of respondents indicating that they provided on-site showers for employees. The second most offered program was flexible work hours, provided by 91 percent of employers. The least offered program was parking cash out, provided by 7.2 percent of respondents.

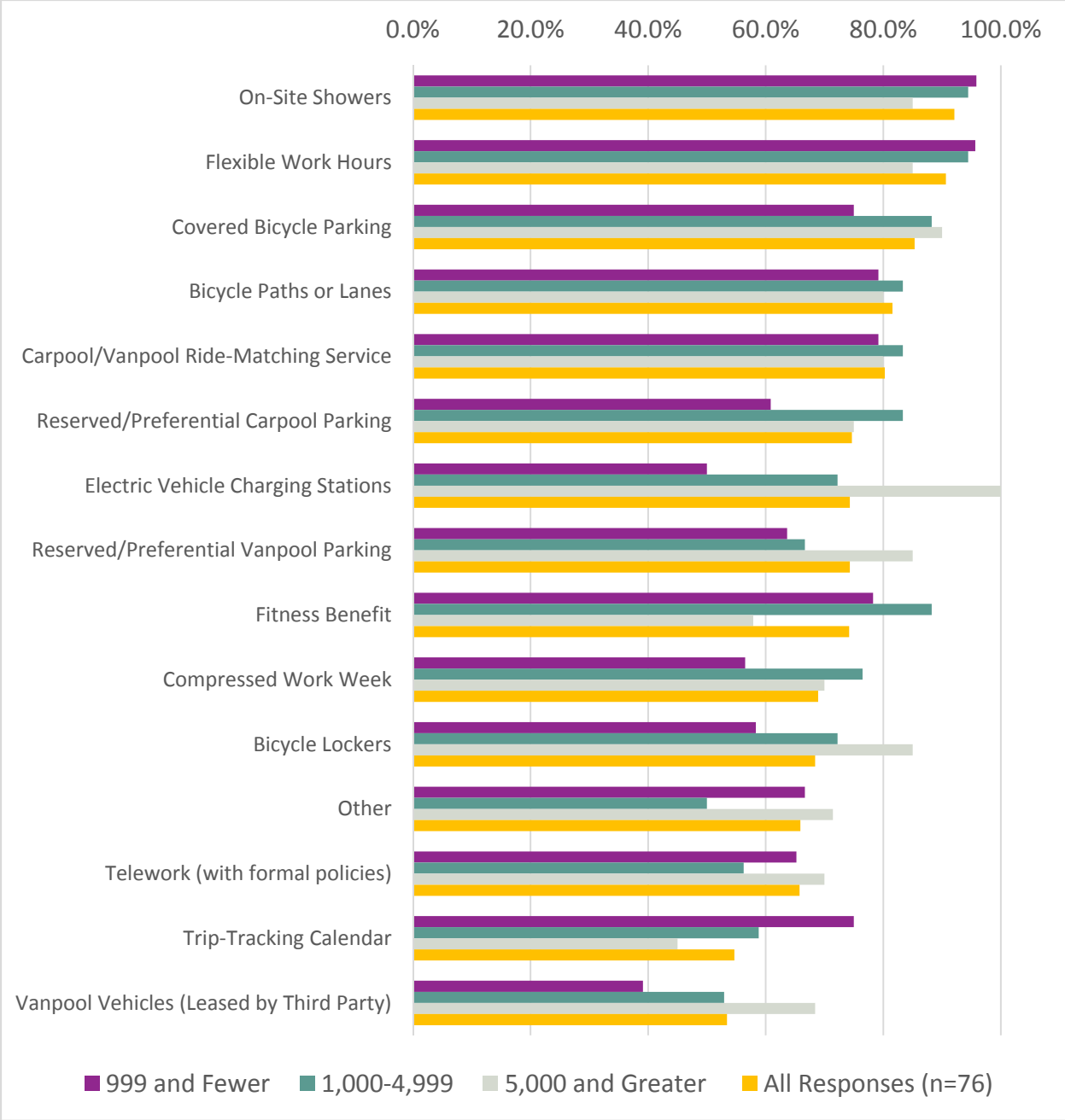


Figure 20 - Top TDM-Related Programs Offered by Employers

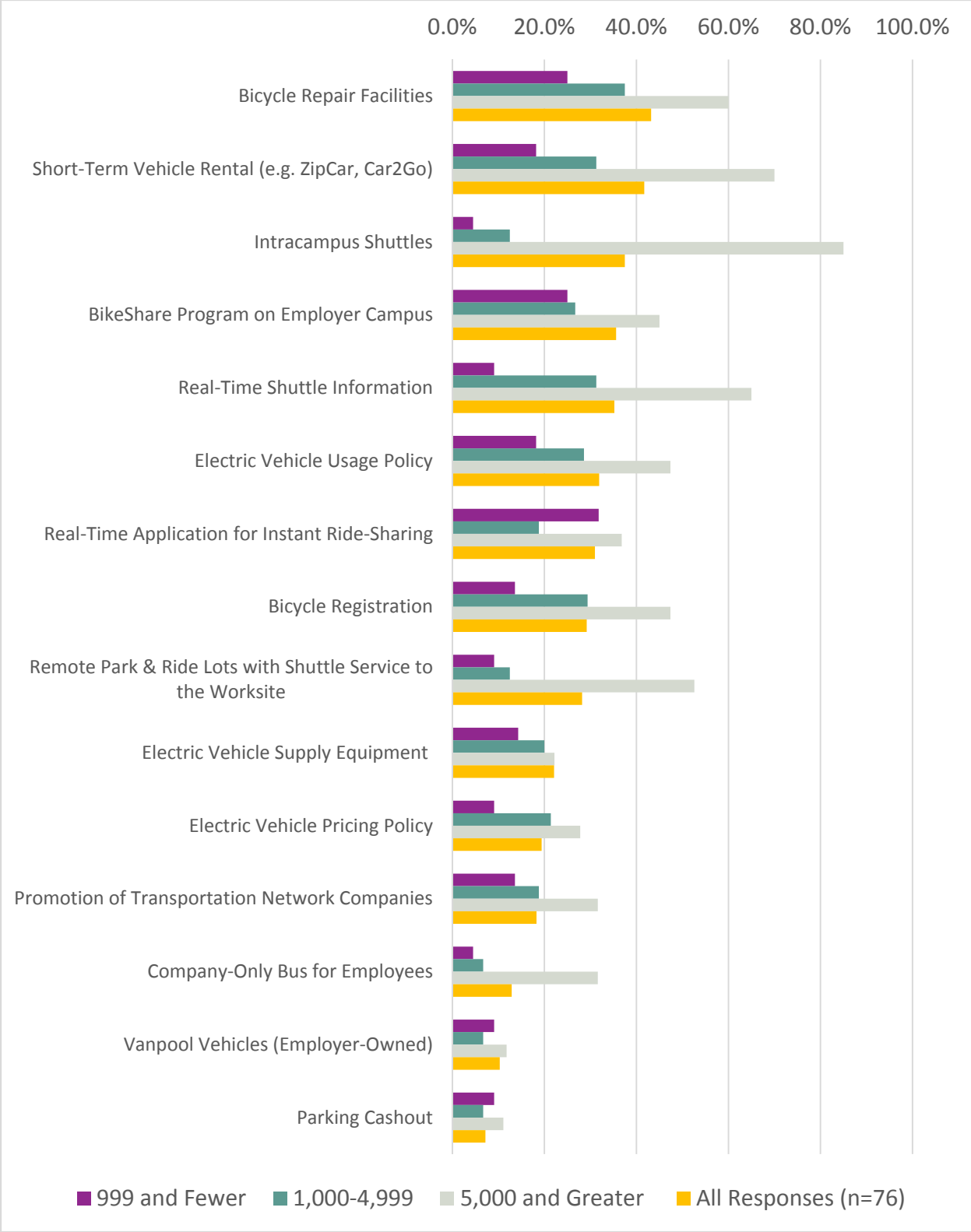


Figure 21 - Additional TDM-Related Programs Offered by Employers

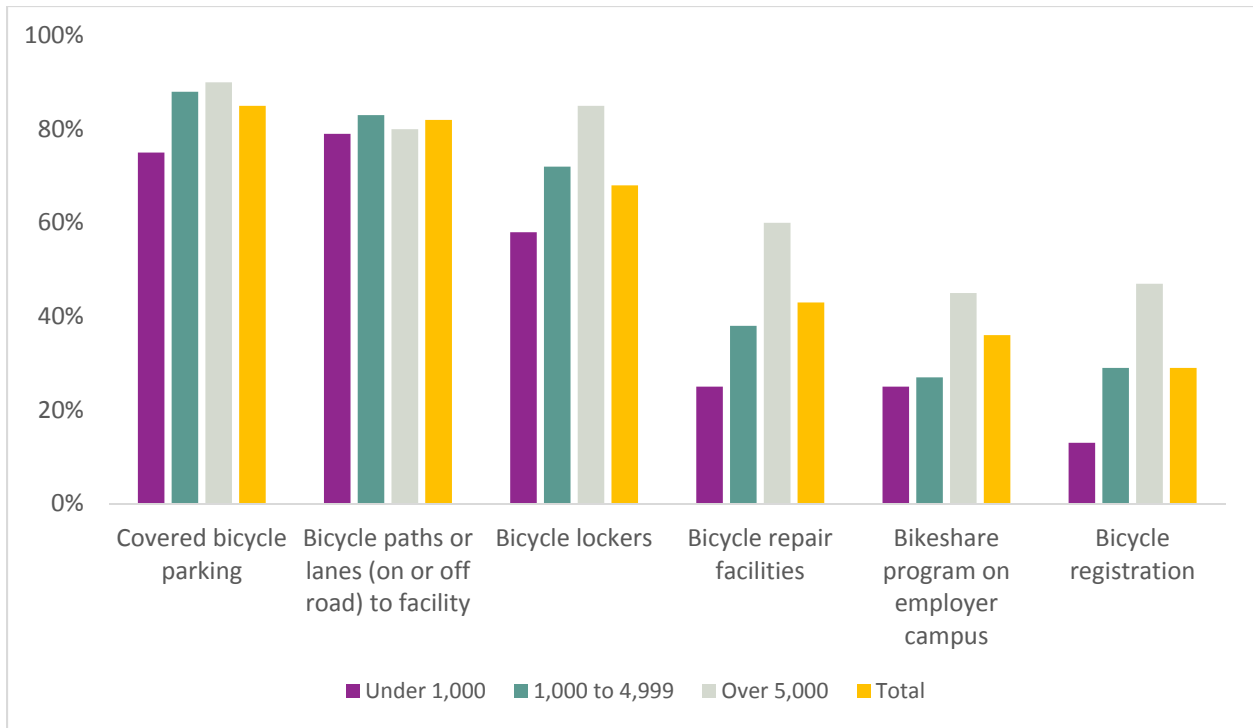


Figure 22 - Bicycle Programs and Infrastructure at Employers

The majority of employers offer bicycle infrastructure with the largest employers offering the full range of bicycle infrastructure and services.

Approximately 74 percent of employers offer electric vehicle charging stations. All of the respondents with employee populations of 5,000 or greater indicated that they provided electric vehicle charging stations for their employees.



Figure 23 - Share of Employers with Electric Vehicle Charging Stations

Parking policies play an important role in how organizations manage their limited supply of parking as well as encourage employees to use alternative modes. Figure 24 shows the range of policies in place among the surveyed organizations regarding the provision of employee parking. Overall 71 percent of employers own their parking facilities.

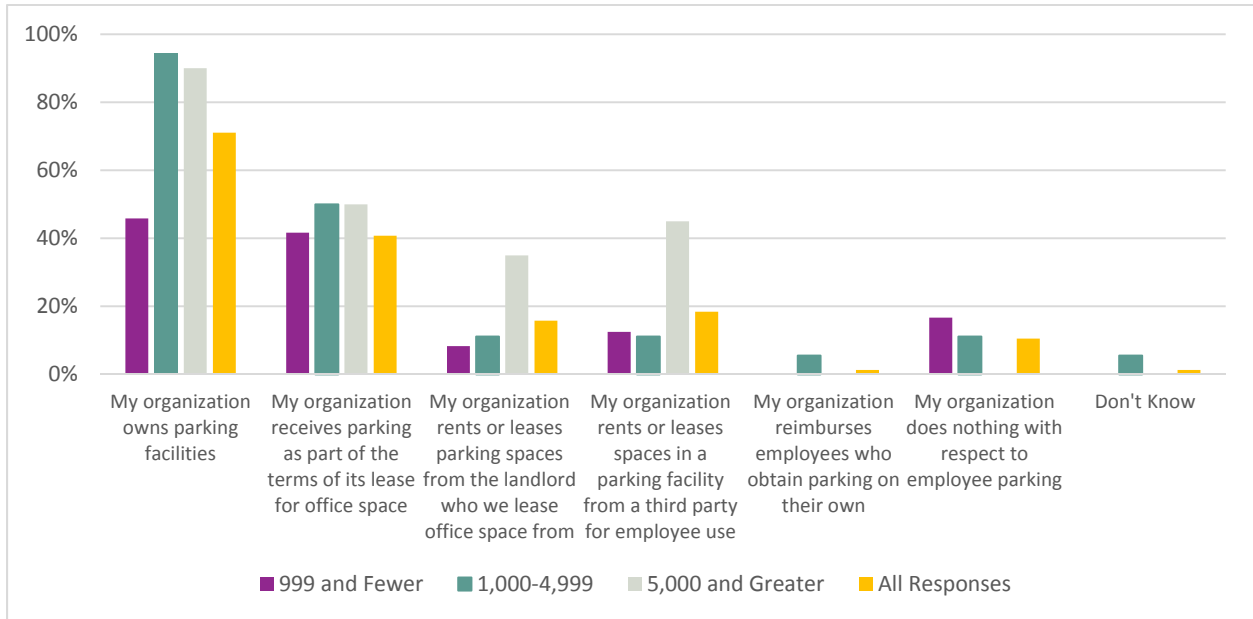


Figure 24 - Employer Policies Regarding Employee Parking

While the majority of employers allot parking on a first come/first served basis, Figure 25 shows that 35 percent of the largest organizations indicated that eligibility for parking space use is based on seniority and 50 percent is based on job classification.



Figure 25 - Eligibility to Use Company-Owned or Leased Parking Spaces



Employers offer a wide range of TDM-supporting amenities, including company fleet cars for employees to utilize for work purposes (as opposed to being reimbursed for an employee’s use of a personal vehicle), on-site lockers and showers to support walking and bicycling, on-site dining, on-site banking, and so forth. On-site showers were the amenity most offered by employers. As could be expected, the largest employers are more likely to offer the amenities. However, fitness centers and on-site showers are offered consistently without regard to employer size. (Figure 26)

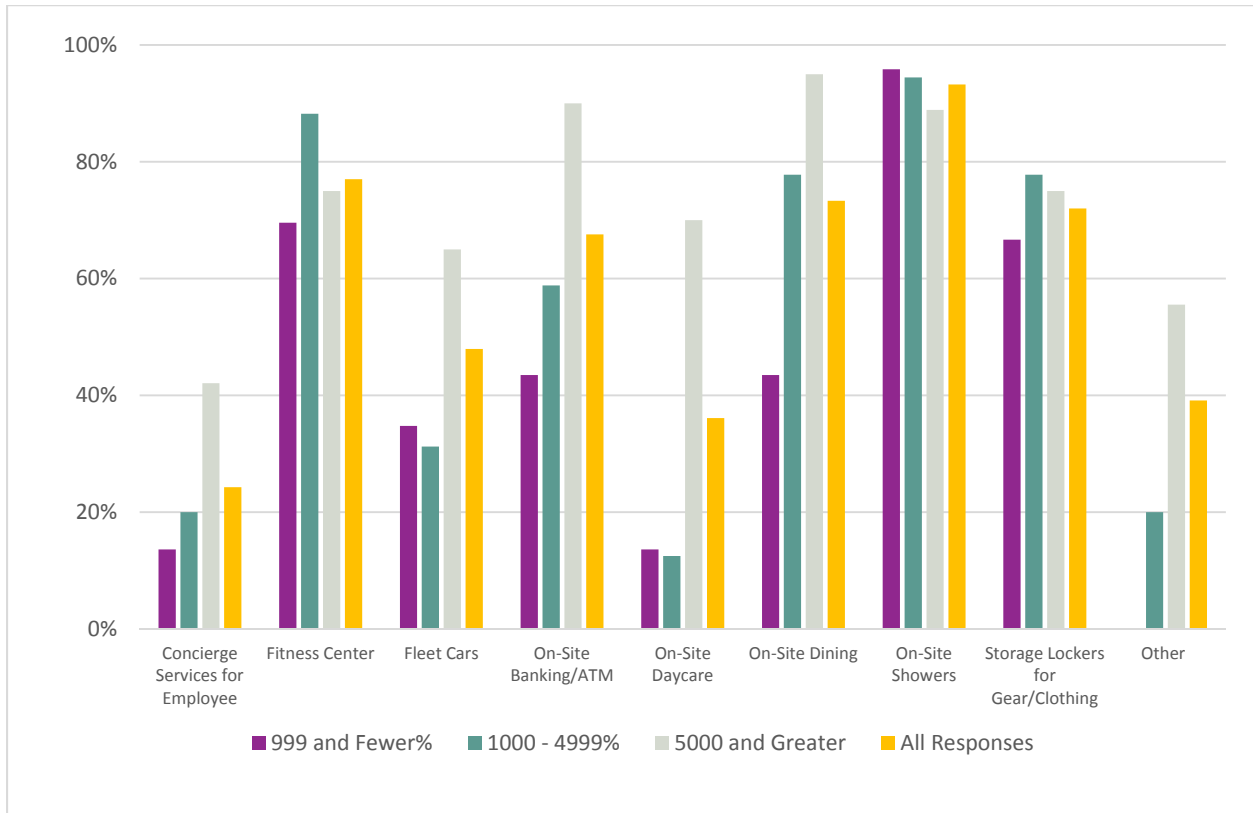


Figure 26 - Supporting Amenities Offered by Employers

## Current Outreach Methods

Respondents were asked about their methods of outreach to inform employees about their commute options that are supported by their employer programs, incentives, and infrastructure. Respondents indicated their top ten outreach methods are the following, listed below starting with the method used the most. Survey responses indicated that these methods are used without difference to size of organization. The use of social media was reported as one of the least used methods by employers.

1. New hire orientation
2. National Bike to Work Day
3. Commuter fairs
4. Bulletin boards
5. Intranet website
6. E-newsletter
7. Earth Day
8. Company website accessible by the public
9. Award Recognition
10. Low Cost giveaways

## Emergency Ride Home (ERH) Offerings

Emergency Ride Home (ERH) services are designed to help employees feel confident using different modes of transportation (carpooling, vanpooling, bicycling, public transportation) other than driving alone. ERH provides a safety net in the event that a situation arises in which the user needs back-up transportation. Often times, this emergency ride comes in the form of a taxi voucher, but there are other forms, such as a rental car or company fleet car, that are utilized. Approximately 11 percent of employers offer Emergency Ride Home service by Transportation Network Company (such as Lyft or Uber). (Figure 27)

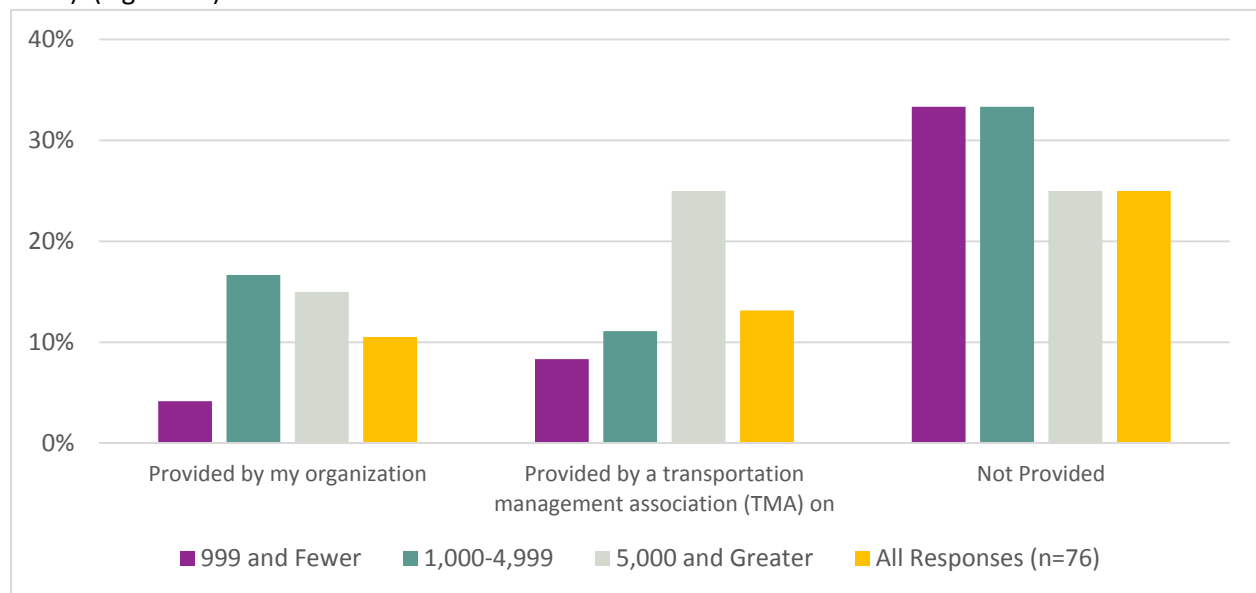


Figure 27 - Emergency Ride Home by Transportation Network Company

Figure 28 through Figure 31 illustrate the method(s) of providing ERH by various means taxi, rental car, public transit or other mode. Taxi is the most common means to provide the ERH service regardless of employer size whether provided by their organization or a transportation management association.

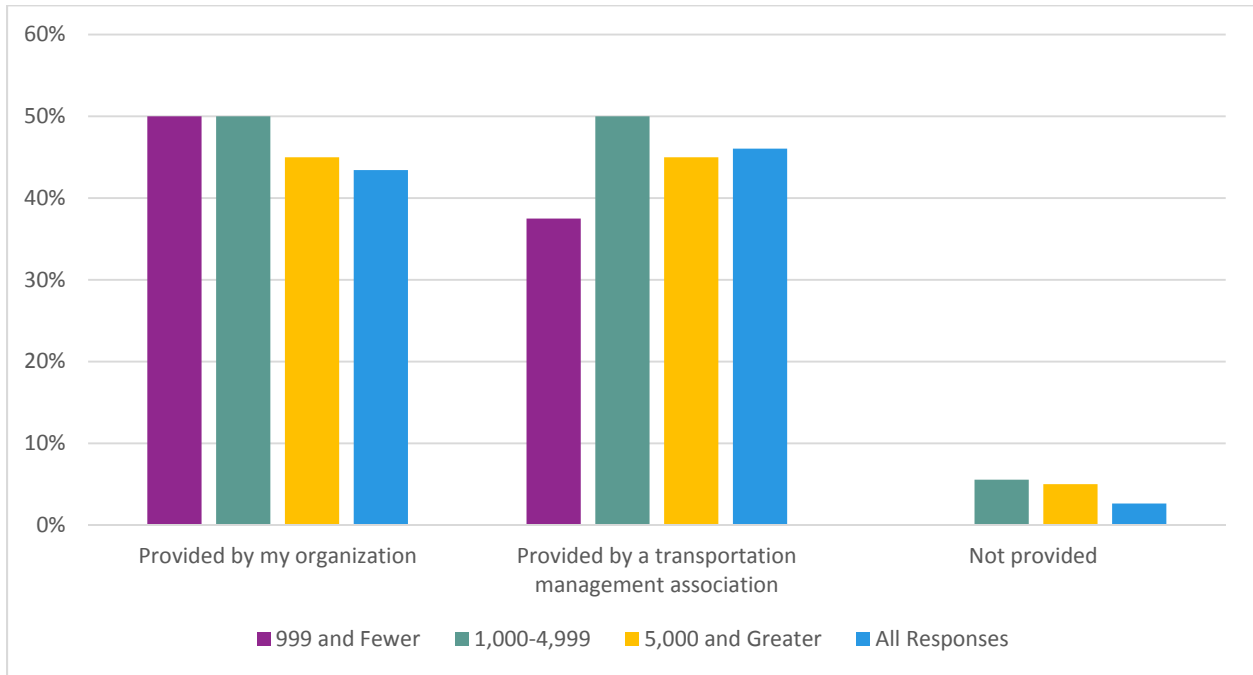


Figure 28 - Share of Employers Offering Emergency Ride Home by Taxi by Employer Size

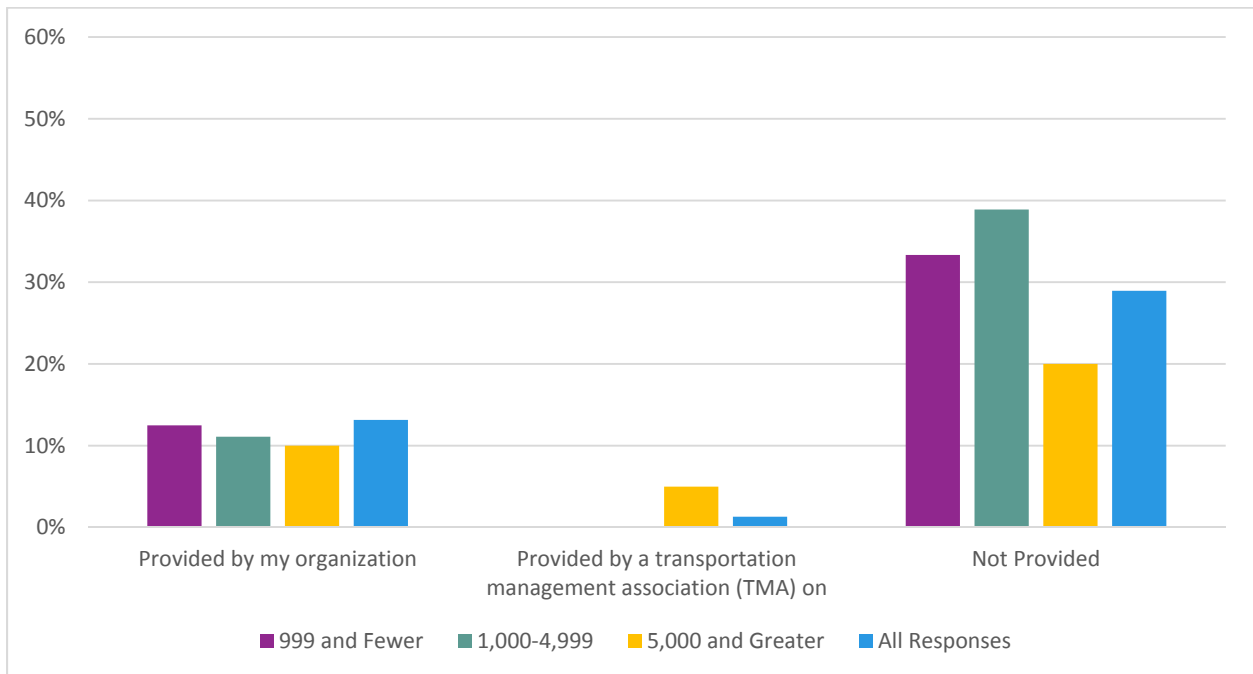


Figure 29 -Share of Employers Offering Emergency Ride Home by Rental Car by Employer Size



Figure 30 - Share of Employers Offering Emergency Ride Home by Transit by Employer Size



Figure 31 - Share of Employers Offering Emergency Ride Home by Other Mode by Employer Size

While Emergency Ride Home services are offered by 92 percent of employers who responded to the survey, 75 percent of these employers place a limit on how many times these services can be utilized in a given year. (Figure 32)

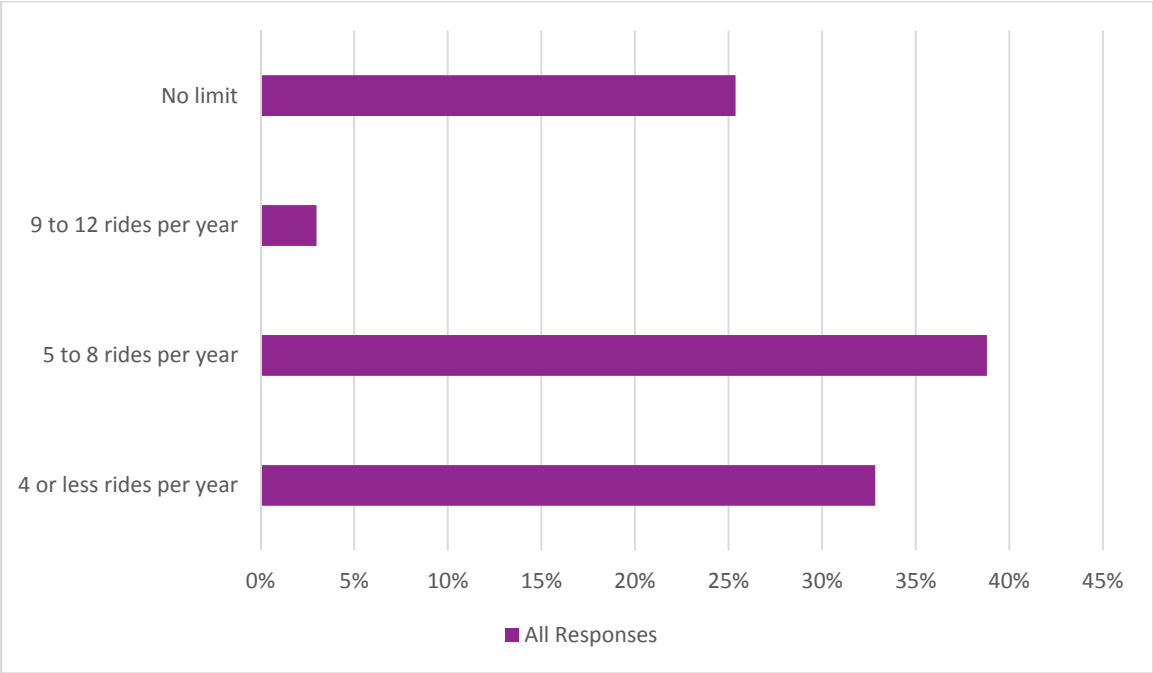


Figure 32 - Number of Annual Emergency Ride Home Trips Offered per Eligible Employee

## Measuring Performance

Performance measurements taken by employers are utilized to determine the effectiveness of their commute programs and financial incentives. The majority of respondents indicated that the measurement of the number of drive-alone commuters was at least one of their methods of measurement. (Figure 33). Other top measurements included the number of bicyclists, carpoolers, and the share of commuters commuting by means other than driving alone. Of the ten most frequently used performance measures, the largest employers have higher rates of using all of these performance measures than the medium sized and smaller employers, except for employee satisfaction. The complete list of performance measure option is shown in Figure 34.

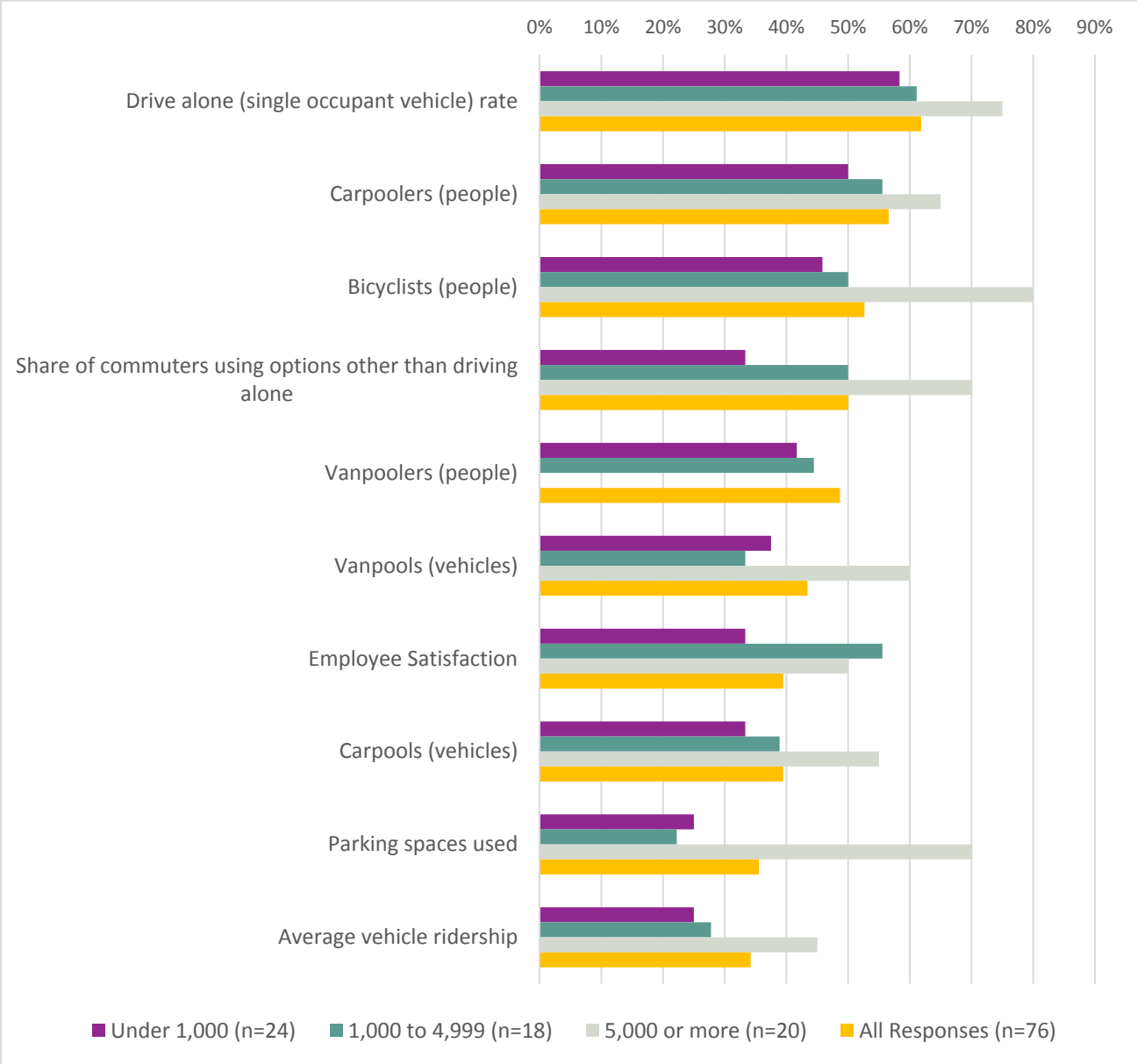


Figure 33 - Top 10 Performance Measures Used by Employers by Size

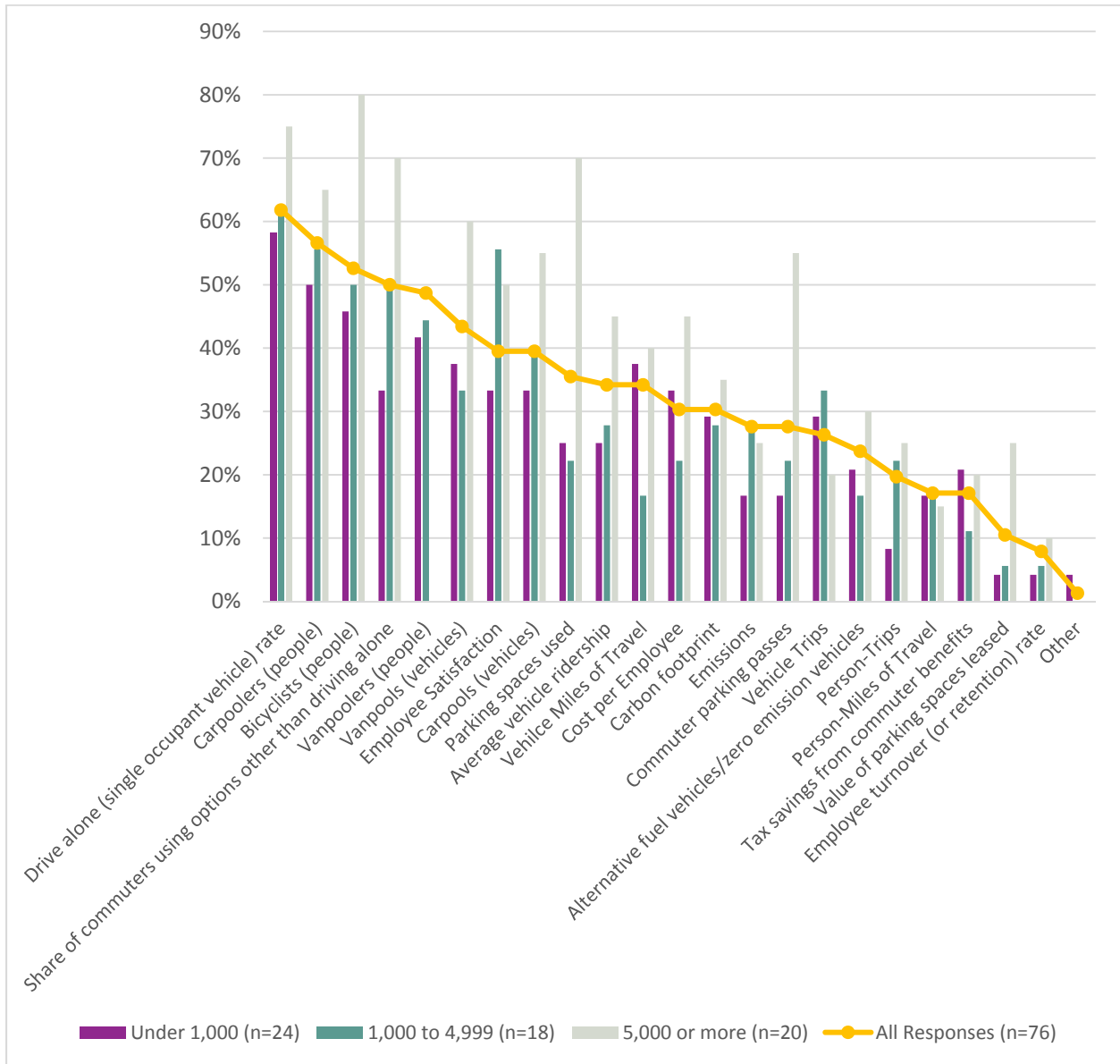


Figure 34 - Performance Measures by Size

Many employers choose to track employee travel behaviors to gain a better understanding of how their employees are utilizing the programs. For those employers who track travel behavior, Figure 34 illustrates what is monitored. For all organizations, tracking ERH vouchers received or used is most commonly monitored.

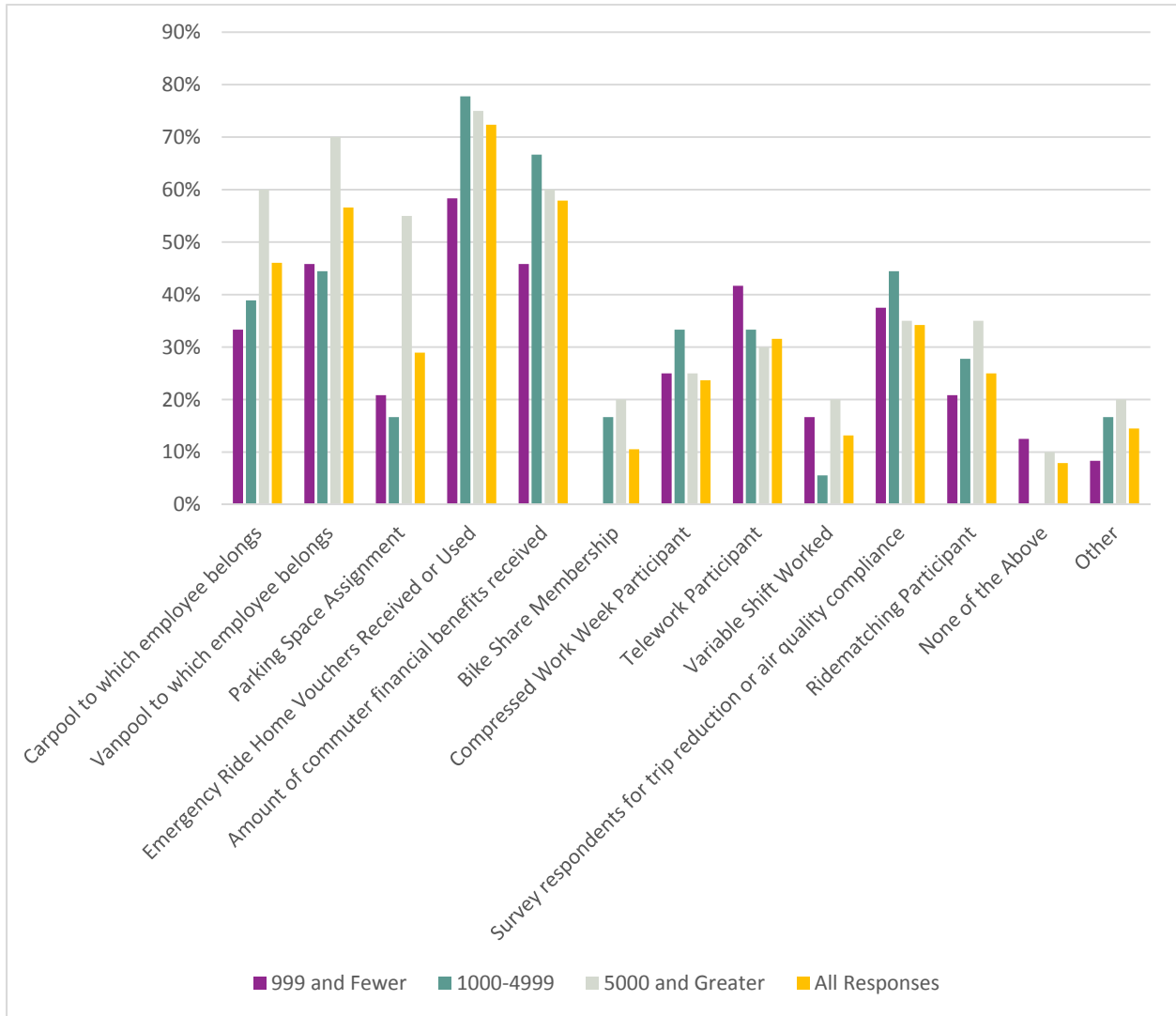


Figure 35 - Commute Information Tracked by Employer by Individual Employee by Employer Size



In order to track employee travel behavior, employers utilize a number of different approaches to collecting such information (Figure 36). Many employers use in-house methods or a resource from a transportation demand management agency or transit agency to collect the information. However, a few employers utilize systems purchased from a vendor.



Figure 36 - Methods Used to Track Individual Employee Behavior

## Future Outlook

### How Employers View the Challenges and Opportunities Ahead

Within the survey, employers were asked about their views on the future regarding commuter services programs, regulations, tax incentives, parking, and automated vehicles. These questions were answered on a scale from “Strongly Agree” to “Strongly Disagree,” with the option of “Neutral” and “No Opinion.” Surprisingly, despite some of the recent discussion about predictions that autonomous vehicles will reduce the need for parking, many respondents indicated that parking will continue to be a major problem for their organizations in the future and rejected the notion that autonomous vehicles will reduce the need for commuter programs. The following charts (Figure 37 to Figure 44) provide the responses in greater detail.

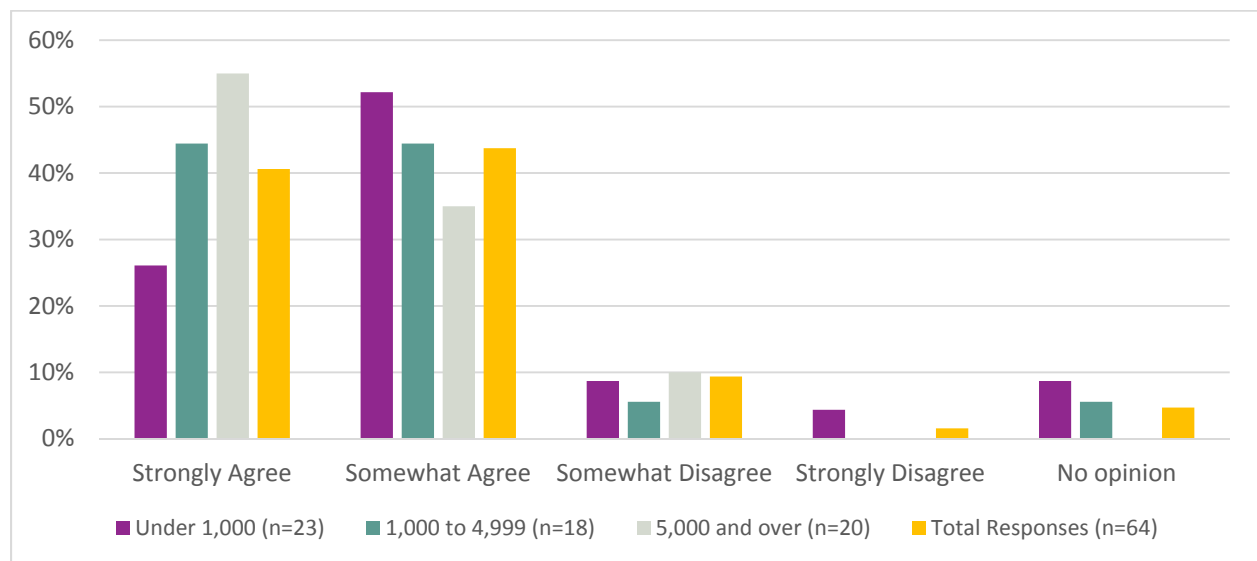


Figure 37 - Extent of Agreement on "Workforce will demand employers provide commuter programs"



Figure 38 - Extent of Agreement on "Government regulations will require us to assume more responsibility for employee commute choices."

Over 30 percent of employers overall indicated that in the future, they will have a better handle on the return on investment of their employee commute programs, as shown in Figure 39. Employers likely know the dollar value of some elements of their employee commute programs. For employers of 5000 and greater, for example, some employers track dollar amounts for ERH vouchers used, parking cash out, and amount of commuter financial benefits received. While 30 percent cited decreased overhead costs as a benefit derived from their employee commute program, it is not known if these employers track actual costs. Employers recognize the many benefits of employee commute programs, which also may save an employer money. However, the survey did not request data from survey participants with regard to actual dollar costs and savings. It is not known whether employers actually attempt to quantify the dollar value of employee commute benefits. For example, 40 percent of employers with 5,000 or more employees cited reduced employee turnover, 45 percent cited increased employee recruitment and retention, 65 percent cited reduced onsite traffic congestion, 15 percent cited reduced absenteeism and tardiness, 35 percent cited improved employee health/reduced employee stress, 30

percent cited increased employee productivity, and 85 percent cited reduced demand for parking. All of these elements can translate to dollar savings that might constitute a return on investment.

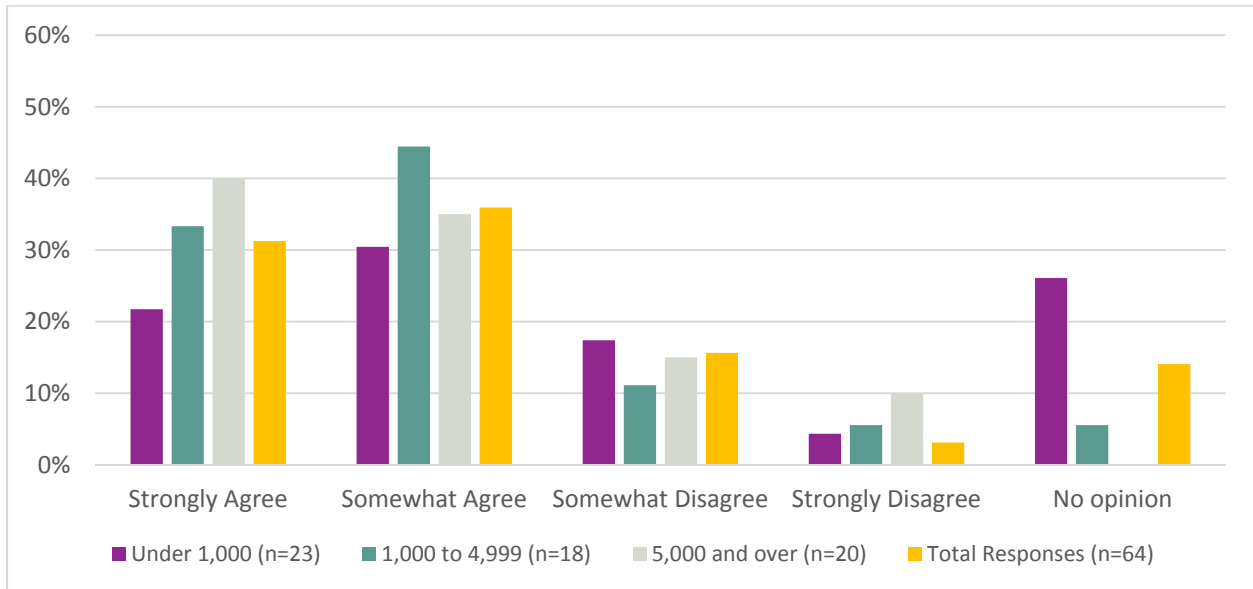


Figure 39 - Extent of Agreement on "We will have a better handle on the return on investment of our employee commute program."

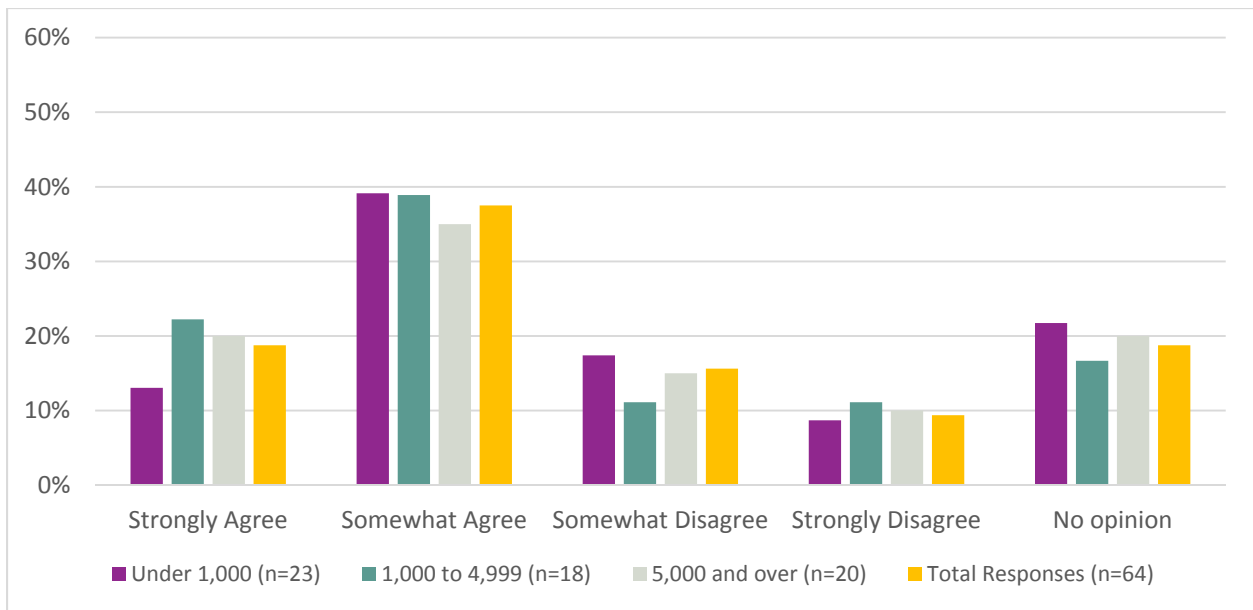


Figure 40 - Extent of Agreement on: "Tax incentives will lead my employer to expand the employee commute program."

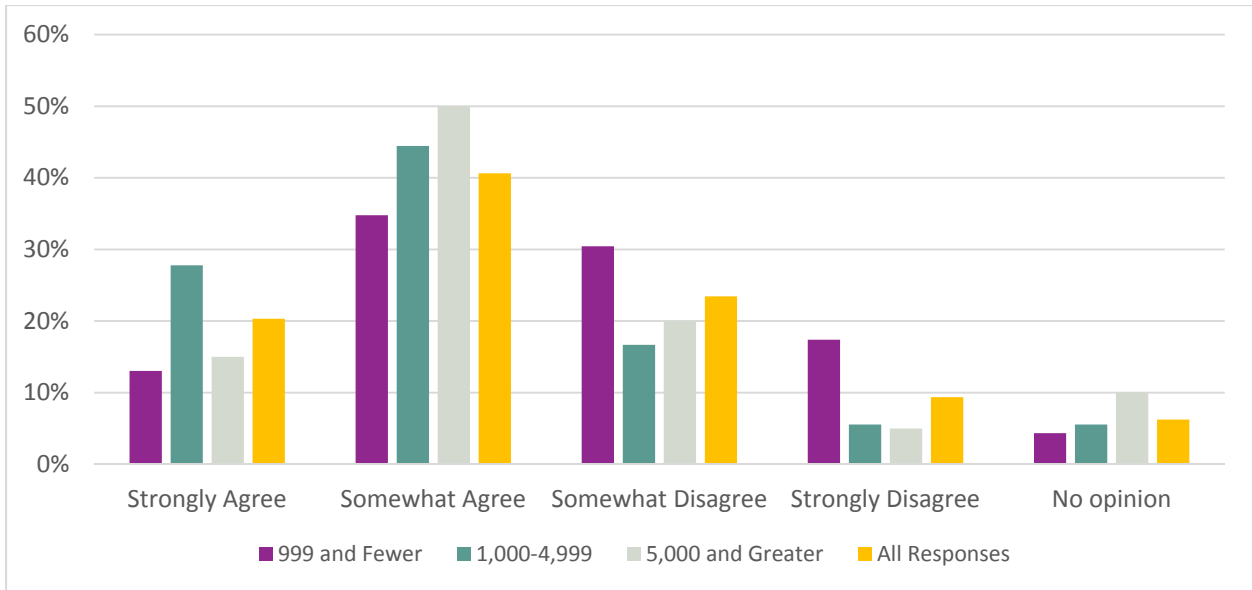


Figure 41 - Extent of Agreement on: "Hiring and retaining employees due to transportation problems will get more difficult."

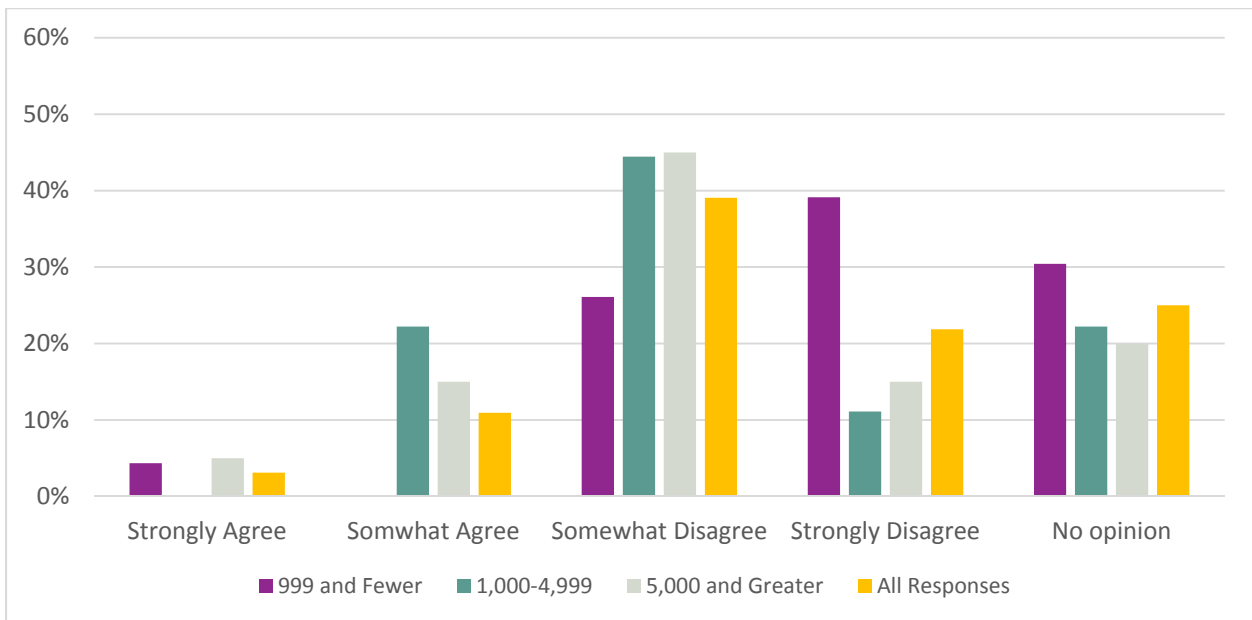


Figure 42 - Extent of Agreement on: "Automated vehicles will reduce the need to have employee commute programs."

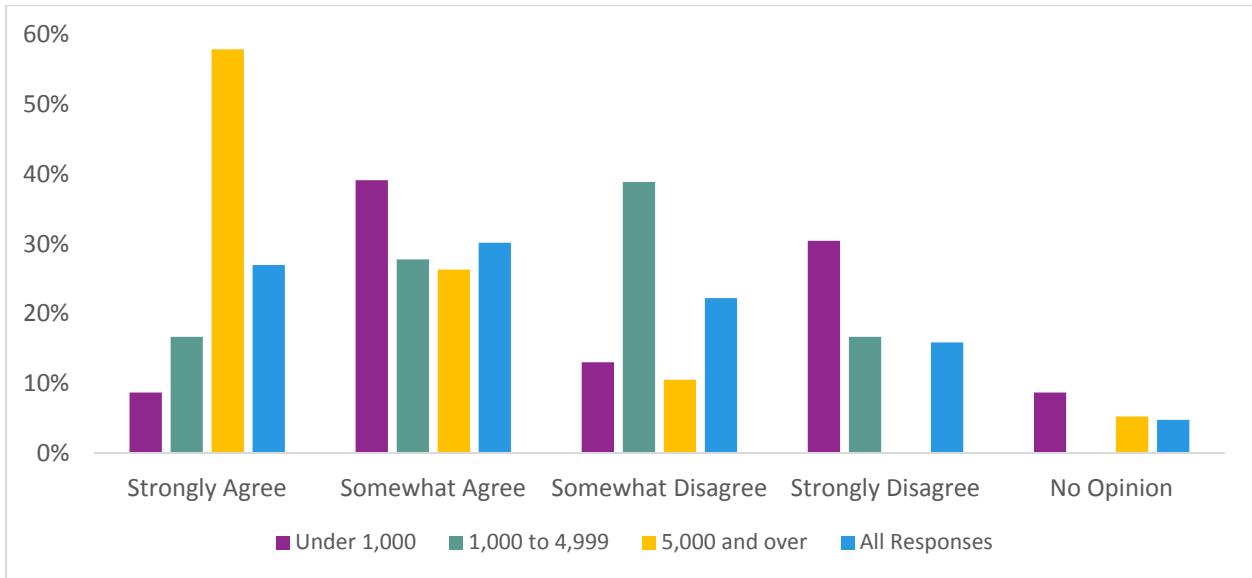


Figure 43 - Extent of Agreement on: "Parking will continue to be a major problem for our organization."

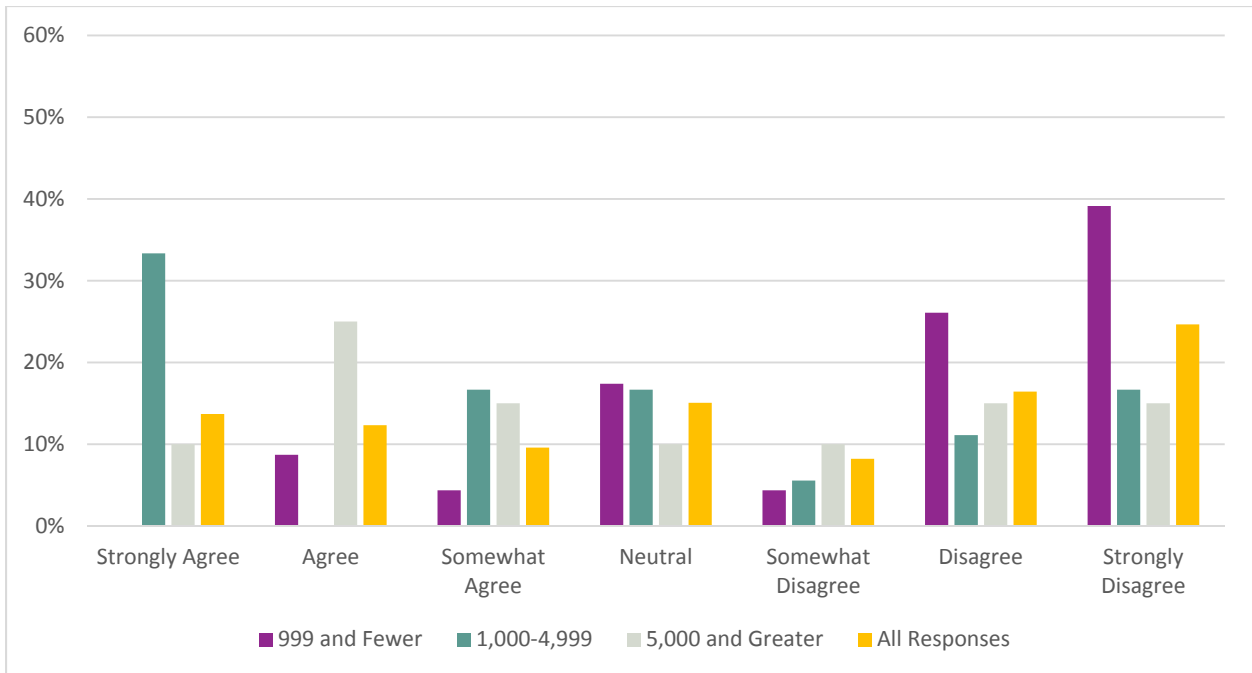


Figure 44 - Extent of Agreement on: "Our organization has plans for making future parking investments such as garage construction, leasing, or valet costs AT THIS LOCATION."

## Conclusion

This document has highlighted key findings from the Employer Benchmark Survey. There are known limitations to the above methodology that limits our ability to declare the results as being representative to employers with employee commute programs. The risk of self-selection bias is also present. Disclosure concerns limited some participation, and confidentiality of response limited some analysis (e.g. by type of employer, location, etc.). To reduce a potential barrier to participation, survey participants were not asked to provide program cost data.

The findings indicate that employers consider employee commute programs to be a valuable asset to their organization, providing a multitude of benefits. In some cases, additional benefits are enjoyed beyond those that provided the original motivation for the employee commute services programs. The survey results indicated that while employers are motivated to achieve certain benefits, they recognize that they are receiving additional “bonus” benefits from their employee commute programs. Many employers also expressed the belief that employee commute programs will continue to be necessary and demanded by the workforce despite the anticipated arrival of autonomous vehicles.

Regarding financial incentives, twenty percent of all employer respondents indicated that they are reimbursing employees for their transit expenses. In these cases, TDM professionals or the employee transportation coordinator should make sure that those employers that offer cash reimbursement for transit passes are making the reimbursements under a bona fide reimbursement arrangement in accordance with section 132(f)(3) of the IRS Code.

Future surveys should consider narrowing the scope to cover topics of particular importance to employers rather than the full spectrum of offerings. Ultimately, the topics selected (e.g., staffing needs, alternative work, improving community relations, incentives/disincentives) should help identify the components of effective employee commute programs at the employer level. While this special topics focus could reduce the opportunity to monitor trends across a wide range of commute programs and employer attitudes, the more focused survey topics could increase participation and understanding. Issues to monitor going forward are the extent of the adoption of transportation network company (TNC) services as part of employee commute programs and the integration of autonomous vehicles into the transportation system.