



**THE SOCIAL DISTANCE
COVID SHUTTLE BUSES
EMPLOYEE PARKING M
TRANSPORTATION CAR
PLAYBOOK E-SCOOTER
FACILITIES MANAGEM
BIKE SHARING - ACTIV
PUBLIC TRANSPORT -
COMMUTER BENEFITS
HR - REAL ESTATE MA**

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Overview

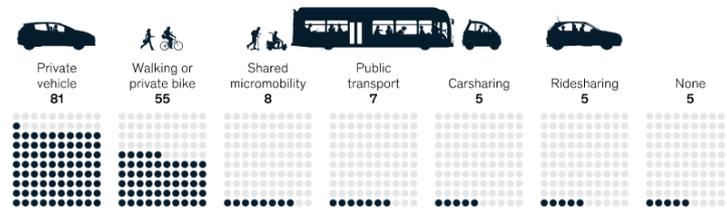
Most experts agree that in the medium term, employees will split their time working from offices and working from home. Leading global employers such as Netflix & Google are beginning to state their long-term support for offices. For many companies, offices are key to their long-term profitability and viability as businesses, this coupled with factors such as collaboration and cybersecurity are going to drive many companies back to offices.

Employee confidence is key to accelerating the return to the office. With staying at home now an option for many employees. COVID has proved to be a tipping point for the employee transportation industry as employers now realize the need to take a proactive approach in encouraging employees to return to the office in a safe & time efficient manner.

Like with many things, COVID has really turned this world upside down. A recent McKinsey report has shown that less than 10% of people believe that shared micro-mobility, public transport, carsharing or ridesharing are safe methods of transport in a world with COVID.

Less than 10 percent of survey respondents believe carsharing, ridesharing, or shared micromobility to be safe.

Perceived health safety of mobility modes, % of respondents



Source: McKinsey Global COVID-19 Automotive Consumer Survey (first 2 parts of ongoing survey conducted May 9–17 and May 23–31, 2020, respectively—each with >8,000 respondents across 7 countries)

McKinsey
& Company

Many employee transportation methods are struggling to gain public trust in a rapidly changing world. This is causing challenges for employers who need to figure out how to get a more fluid workforce to work safely and for mobility operators who need to demonstrate how they are part of the solution.

Solving the employee transportation challenge is uniquely different for each company based on their location, the demographic of their employees and their necessity to get back to the office. There are also so

many service offerings such as parking management, e-bikes, carsharing, e-scooters, public transport etc. who have roles to play for certain companies in streamlining employee transportation in the COVID era.

In this playbook, we've attempted to simplify things for employers. We've gone out and talked to industry experts from all the different mobility verticals to create a centralized resource which allows you to discover how each mobility mode supports employee transport as workers return to the office.

We've also talked to leaders from the world of real estate, property management and facilities management to discover what their key concerns are, as they look to chart a path back to offices for their clients, occupiers and staff.

We hope this playbook makes it safer and easier for employees to get back to work.

Safe travels.



Daithí de Buitléir
Chief Marketing Officer
ParkOffice



REAL ESTATE SOCIAL D

ADVISORS CARSHARIN

PARKING MANAGEMENT

CAR SHARING - E-BIKES

Understanding The Challenge For Real Estate Advisors

Past: Good public transport links and increasing consideration for clients as they choose office locations

Present: Helping tenants navigate increased demand for parking and cycling

Future: Supporting tenants to find the new real estate model which works for them

How were real estate advisors managing commuters pre-COVID?

Most commercial real estate advisors represent a broad base of clients with a broad range of interests. Pre-COVID the importance of employee transportation really varied from occupier to occupier.

However, there was a growing trend which saw employers place a premium on good public transport links as they looked to ensure their offices were accessible and attractive to employees and prospective hires.

"We were getting a lot of enquiries which would ask us to put forward options which prioritized access to public transport links"



James Mulhall,
Managing
Director,
Murphy Mulhall

Additionally real estate advisors would also be a first port of call for parking problems with occupiers often tasking their agents with sourcing additional parking spaces near their offices to help manage staff demand.

How are real estate advisors adapting to make it safer to travel to work?

Very few industries have been disrupted as heavily by the COVID pandemic as the commercial real estate sector.

Overnight offices have gone from being an everyday part of working life to an asset which needs to be re-evaluated.

The commercial real estate industry is now faced with the challenge of reimagining what their industry will look like bearing in mind the new challenges facing occupiers around the world.

This is leading to real estate advisors and occupiers placing an increased emphasis on employee transportation and it's supporting infrastructure as a means to enable employees to return to the office when it is safe to do so.

"Companies are open to investing in making it safer to get to the office, be that way of bikes, carpooling or driving but these come with add-ons for occupiers whether it means extra shower facilities or extra parking spaces, there is a need to improve real estate offerings."



James Mulhall,
Managing
Director,
Murphy Mulhall

What role do real estate advisors have in the future of commuting?

The future of commercial real estate is very much up in the air at present.

Most experts agree that while a return to office working is inevitable in many ways, we will never again see people working en masse in the office from 9-5, five days a week.

This will raise many interesting questions for real estate advisors and occupiers.

Gone will be the days where there is a one size fits all approach to commercial real estate. The needs and cultures of workplaces will diverge even more now than ever.

Real estate advisors will need to embrace technologies like never before to help companies deliver the office experience that best fits their new culture.

What does this mean for employee transportation? We're moving away from an era of fixed return, the winners will be companies who embrace the newfound flexibility. For example, clients are going to start moving away from fixed parking leases and look for technology solutions which allows them to scale their parking bill up and down depending on employee usage.



TRANSPORT SOCIAL DI

PLANNERS CARSHARIN

PARKING MANAGEMENT

CAR SHARING - E-BIKES

Understanding The Challenge For Transport Planners

Past: Working with cities, employers and communities to provide infrastructure needed to get to work.

Present: Helping tenants navigate increased demand for parking and cycling

Future: Supporting tenants to find the new real estate model which works for them

How were transport planners managing commuters pre-COVID?

Transport planning has become an increasingly important societal function over the last few decades as congestion grows in cities and environmental concerns increase.

"The role of a transport planner is to identify the transport needs of a community and to develop plans to help them meet these demands usually with sustainability as the core concern."



Khaoula Morchid,
Transport Planner

Traditionally transport planners have worked closely with local governments and public bodies to help them develop blueprints for the transport infrastructures needed to service the social

and economic needs of their communities with a key focus on public transport.

In recent years, we have seen a growth in the application of the transport planning approach to large-scale corporates particularly in high-density areas in the US. This is referred to as Transport Demand Management and basically sees large employers create in-depth plans on how to get staff to and from the office and maps out additional infrastructure, software and services a company needs to provide in order to manage employee transportation.

How are transport planners adapting to make it safer to travel to work?

Safety, capacity and perception are three key areas of concern for transport planners at the moment.

A lot of commuters are understandably worried about the safety of various transport methods particularly public transport.

In the short-term transport planners are working with transport providers to manage capacity issues particularly as many services can only run with limited availability due to social distancing.

The second large question for a lot of transport planners at the moment is how to restore public confidence. Planners need to tackle perception around what is a risk and what is not when it comes to public transport.

"A lot of people are not using public transport at the moment which is a perception challenge. People are worried about risks of COVID and mask compliance is an issue"



**Khaoula Morchid,
Transport Planner**

Transport planners are faced with industry wide challenges to engage key stakeholders to resolve these issues which are only amplified as cities start to return to offices.

What role do transport planners have in the future of commuting?

Infrastructure has been a major positive in the world of transport throughout the pandemic. This will accelerate moving forward as transport planners work with authorities to identify road space which can be reassigned for cycling and other active travel methods.

Large scale repurposing projects and all other transport planning projects moving forward are going to be increasingly underpinned by data. There are a whole host of solutions and software out there now which can provide planners with the sort of datasets they would hardly have dreamed possible.

This will equip planners with the tools and insights they need to create sustainable and practical ways to get around.



PROPERTY SOCIAL DIST

MANAGERS CARSHAR

PARKING MANAGEMEN

CAR SHARING - E-BIKES

Understanding The Challenge For Property Managers

Past: Struggling to move the dial on sustainable commuting

Present: Ensuring offices cater for increased parking and cycling demand

Future: Increased flexibility for a fluid workforce

How were property managers managing commuters pre-COVID?

As technology and science improved, sustainability became front and centre for property managers. Commuter management was an area of key focus as offices began to provide the enhanced facilities needed to encourage people to leave the car at home.

Increased bicycle storage and improved shower facilities were just two key areas of focus for property managers looking to provide an improved tenant experience.

However, in spite of progress in relation to cycling to work and other forms of sustainable travel, for many property professionals, parking remained a constant source of stress. Tenants struggled to get large numbers of staff to leave their cars at home, particularly in suburban locations with poorer transport links. This resulted in

parking remaining as a constant bone of contention between many tenants and property managers.

How are property managers adapting to make it safer to travel to work?

Obviously the early focus for many property managers were areas such as sanitization and floor plans which ensured people could remain socially distant at the office.

Attention is now turning to getting people to work safely. Property managers are working closely with tenants to create the support system needed to empower employees to return to offices safely. Common requests include increasing the availability of car and bicycle parking facilities.

“We’re seeing clients requesting parking management software like

ParkOffice to increase availability. We're also seeing clients looking to place a very heavy emphasis on cycling to work when they return"



**Michael Farrell,
Estate Manager,
Aramark**

These bring about their own challenges, obviously parking spaces are at a premium at the best of times and are traditionally managed inflexibly. While providing extra bicycle storage in a car park seems straightforward, when every parking space is valuable, there can be a clear conflict in needs.

The increasing demands being placed on property managers will see many introduce new technology to manage parking and facility usage to ensure existing space is used safely and effectively.

What role do property managers have in the future of commuting?

As offices emerge from a world dominated by COVID, the green agenda will again dominate future planning for commuters. However, the world will be very different for many property managers.

A more fluid workforce which works from home more frequently will mean that commuter management will become more flexible. Property managers will move away from fixed allocations for tenants around parking and cycling facilities to a more variable pay by use model.

Much of the technology employed during COVID to monitor occupancy to ensure safety will remain integral as companies look to manage flexibility and optimize efficiencies.



FACILITY SOCIAL DISTA

MANAGERS CARSHARI

PARKING MANAGEMEN

CAR SHARING - E-BIKE

Understanding The Challenge For Facilities Managers

Past: Commuting a low priority which wasn't getting enough attention

Present: Ensuring offices cater for increased parking and cycling demand

Future: Increased flexibility for a fluid workforce

How were facility managers managing commuters pre-COVID?

For a lot of businesses particularly those with headcounts in the hundreds, commuter management has loosely fallen under the remit of the facilities management teams.

Facilities management is an incredibly broad brief and in the eyes of many FMs commuting has not been seen as an essential problem to solve.

A school of thought has emerged that employees spend eight to ten hours a day in the office and only a matter of minutes availing of commuting facilities, so it's easier to focus on the office experience.

This attitude was slowly shifting as companies realized commuter management was shaping employee mood each day as they arrived at the office.

"With the pressure that FMs are under with everything else, it's easy to think that car parking is outside the four walls of the office building and can be worried about later"



Will Easton,
Head of
Workplace,
One Eighty Group

How are facilities managers adapting to make it safer to travel to work during COVID?

COVID has really driven employees and employers to reflect on the whole workplace experience.

As working from home becomes a real long-term alternative to the office, FMs are being pressed to come up with solutions to ensure that returning to the office is a safe, easy and fulfilling experience.

Providing certainty to employees is a key pillar here

for FMs.

In the same way that desk & meeting room booking software is becoming commonplace as staff look to figure out if they can access facilities safely. Solutions which can enable commuter certainty also has a massive role to play.

"Staff need to be given information of what's available. People don't want to be turning up and just hoping for the best."



**Will Easton,
Head of
Workplace,
One Eighty Group**

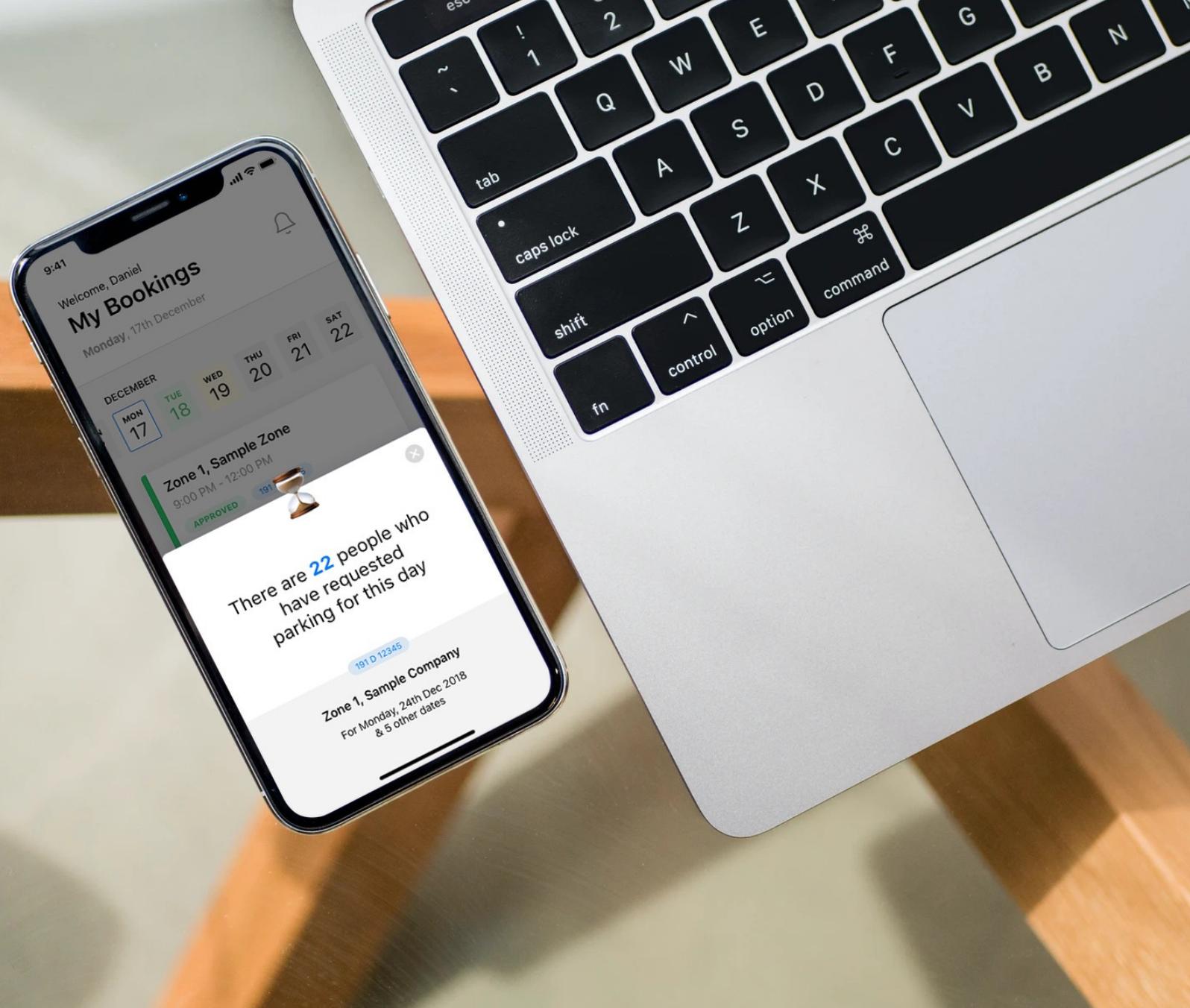
Gone will be a world dominated by spreadsheets and site visits, replaced by automated monitoring and powerful software.

This will lead to increased data fuelled insights which allow FMs to deliver on diversified transport options for employees. In turn, ensuring that companies are able to reduce congestion and lower emissions to tackle the world's growing climate crisis.

What role do facilities managers have in the future of commuting?

Like many verticals, the Coronavirus crisis looks to prove a watershed moment for facilities managers. Technology has gone from a nice extra to an absolute necessity.

The complexity of managing buildings and travel to and from them has increased dramatically in a matter of months. With fluid work patterns here to stay, it's safe to predict that the future role of FMs in relation to commuter management will be technology driven.



OFFICE PARKING TAXIS

CARPOOLING - BIKESH

FACILITIES MANAGEM

CAR SHARING - E-BIKE

How Can Office Parking Help?

Past: Massive pain point for companies, draw on resources with a negative environmental impact

Present: Vital to adopt technology to optimize space for the changing world of work

Future: The focal point for diversified employee mobility

How did office parking help commuters pre-COVID?

For a long time office parking policies have been the pillar of employee transport management. Companies provided parking for some employees and didn't provide parking for others.

For a long time managing parking has been a challenge for employers. Sourcing parking spaces, ensuring that space is being fully utilized, dealing with violations and managing parking privileges are just some of the time-consuming and thankless tasks associated with managing employee car parks.

"Office parking management has had no uniform approach for a long time. Parking management software is creating a new gold standard for employers"



Garret Flower,
CEO & Co-
Founder,
ParkOffice.io

Parking management software had been growing in popularity over recent years resulting in greatly improved employee parking experiences for commuters across the globe. Key benefits include:

- Increasing parking availability by up to 40%.
- Reduced carbon footprint.
- Automated allocation of parking spaces.
- Real-time availability trackers.

How can office parking help your staff get back to work?

The onset of COVID saw many companies accelerate their digital transformation, introducing new tools for video conferencing and internal communications.

The return to the office is going to have a similar effect and parking management software will be one of the key solutions which will be rolled out by companies around the world. As companies return to their

offices. New work patterns are here to stay. Many companies will now be dealing with fluid workforces, with employees in the office for a few days and working from home for the remainder of the week.

Couple this change in ways of working with a surging demand for employee parking as companies look to socially distance during their commutes and employers are faced with a whole new host of variables when it comes to managing parking.

Parking management software will simplify this transition for businesses. In milliseconds, technology can track who needs parking and when, notify staff where to park and advise other staff how to get to work safely. This would be work that would take hours if not days for companies to do manually.

“Parking management software is a must-have for most offices as they look to return. With the rise in flexible working and growth in parking demand, there are just too many variables to manage manually. Software can do the job in a fraction of the time for a fraction of the cost”.



Garret Flower,
CEO & Co-
Founder,
ParkOffice.io

How will office parking help staff commute in the future?

In the near future, parking management software will provide businesses with much needed data points, required in helping them reduce real estate costs. As flexible working increases and office space decreases, it will be important for employers to base reductions on clear and actionable data points.

In the medium term parking management software will become the focal point for many mobility initiatives. Carpooling, EVs and micromobility all share one thing in common. The need for parking spaces. Parking software will allow companies to manage these broader commuter changes.



CARPOOLING SOCIAL D

SHUTTLE BUSES - CARS

PARKING MANAGEMENT

CAR SHARING - E-BIKE

How Can Carpooling Help?

Past: Age old way of getting to work which was making a comeback

Present: Potential method to limit close contacts as staff return to work

Future: Technology will improve to thrive in more fluid environments

How did carpooling help commuters pre-COVID?

Carpooling has clear financial and environmental benefits. Therefore it's somewhat surprising that it has massively declined as a commuter option over the last 50 years.

Back in the 1970s, as many as 20% of Americans carpooled to work. That has dropped to as low as 7% in the modern era.

The growth of technology had started to reverse this trend as apps started to seamlessly link drivers and passengers.

In a break from the tradition of discovering potential carpool companions in the canteen, commuters were benefitting from business to business propositions like Scoop which were rolled out through employers and B2C propositions which focused on building communities based around geography.

"A lot of professionals prefer to travel to work by car.

Carpooling connects these people, ensuring that they can still travel in comfort but with much less carbon footprint"



Priyadarshi Singh,
Director of Sales
& Marketing,
Quick Ride

How can carpooling help your staff get back to work?

Not surprisingly carpooling has taken a severe hit. Like a lot of shared mobility solutions, carpooling has fallen victim of the new world order where social distancing is paramount.

Carpooling operators are recording a drop off of up to 85% in activities, but as economies restart, consumer confidence is slowly returning.

Many in the carpooling industry feel that they have been somewhat adversely affected by COVID in comparison to other shared mobility options, arguing that carpooling limits your pool of close contacts in

comparison to public transport or taxi.

“Commuters need to realize that when you travel in a cab you have no idea who the driver has been in contact with. On the other hand when you carpool you will have a much better idea of who your companion has been interacting with and their risk profile.”



Priyadarshi Singh,
Director of Sales
& Marketing,
Quick Ride

How will carpooling help staff commute in the future?

Pre-COVID it would have generally been accepted that the world needed carpooling to keep growing.

When it works well it has clear social, environmental and financial benefits for both employers and employees.

Widespread adoption has generally been plagued by an inability of technology to create a seamless experience at scale. Essentially how could companies roll-out carpooling in a way which ensured their staff could always get a ride when they needed one.

This challenge is only going to be amplified by changes to the way people work post-COVID.

Employees will be coming to the office in lower volumes with less frequency. This will make it harder for companies to create those valuable & predictable long lasting relationships which form the backbone of a strong carpooling programme.

Technology is going to play a more important role than ever. Companies & landlords will need to begin working at cross-building and cross-campus level to start widening the pool for relationships.

On the plus side, a lot of governments are subsidizing and supporting carpooling. This means that as it becomes more difficult to drive to work, employees might become more open to swallowing less pain by carpooling.



COMMUTER SOCIAL DISTANCING
ENGAGEMENT SHUTTLE SERVICE
PARKING MANAGEMENT
CAR SHARING - E-BIKE

How Can Commuter Engagement Help?

Past: A growing approach to changing the dial on employee transport choices

Present: A way to track and gamify particular behaviours as employees return to the workplace

Future: A key pillar to help companies develop insights and data on commuter habits & preferences

How did commuter engagement help commuters pre-COVID?

Commuter engagement is the process of making employees feel good about adapting their mobility habits in favor of more sustainable options.

Commuter engagement has happened informally for decades with companies rolling out ad-hoc incentives and challenges to try and stimulate behavioural change.

In recent years, technology has started to disrupt this space. Making it easy for companies to roll-out commuter gamification at scale in the click of a button.

Particularly popular on the densely populated west coast of America with global tech giants, commuter engagement softwares like Ride Amigos support companies to roll-out initiatives like:

- Mobility challenges (e.g. bike

to work week).

- Rewards schemes (e.g. leave your car at home to win vouchers)
- Parking cash-out programs

"More employers have been investing in commuter engagement programs to address business concerns from facilities and compliance issues to recruitment and retention to sustainability"



Kathryn Hagerman,
Director of
Marketing & CS,
Ride Amigos

How can commuter engagement help your staff get back to work?

The role of commuter engagement platforms has evolved in response to the COVID challenge.

While an emphasis on getting people to travel responsibly is still key, commuter engagement software's primary role at the

moment is incentivising people back to the office, particularly in markets where restrictions are allowing for workplaces to reopen.

“Business are using enterprise commuter engagement apps like RideAmigos to provide safe commuting information or offering gamification and rewards to make commuters feel appreciated even if they have chosen to use a single-occupancy vehicle”



**Kathryn Hagerman,
Director of Marketing & CS,
Ride Amigos**

How will commuter engagement help staff commute in the future?

Pre-COVID making changes to commuter management could be a tedious process often fraught with tension. Ultimately employees like their perks and anything which potentially changes ways in which people can travel to work has the potential to cause upset.

Since the beginning of the pandemic, employees have shown remarkable flexibility to adapt to and adopt new ways of working which are needed to thrive in the new era of work.

People recognize that the way we travel to work needs to

change both in the medium-term and long-term.

“While the future is still uncertain, many employers are seizing the opportunity to reimagine the way they support commuters as more people return to offices”



**Kathryn Hagerman,
Director of Marketing & CS,
Ride Amigos**

Placing a commuter engagement solution at the core of this process can bear fruits in the long-term.

Commuter engagement software allows companies to build an in-depth understanding of commuter behavioural changes and preferences, allowing companies to underpin all their key decisions with data & insight.



PUBLIC PARKING SOCIAL

SHUTTLE BUSES - CARS

PARKING MANAGEMENT

CAR SHARING - E-BIKE

How Can Public Parking Help?

Past: A sector in transition, struggling to define its offering in a more environmentally friendly world

Present: A safe option if the employee car park is full

Future: Flexible, smaller spaces, parking more cars, more efficiently

How did public parking help commuters pre-COVID?

Public car parks have played a key role in commuter management for a long-time. Traditionally, companies or commuters in need of parking spaces which weren't available at the office, looked to the nearest public car park.

However, in recent years this trend was starting to change. Environmental, financial and ease of use factors were seeing younger commuters choose alternative commuting options.

"Pre-COVID we were seeing more and more of the younger generation walk away from their cars, use scooters and bikes to get from their homes to the nearest transport hub, and give up their single occupancy car"



Jeff Okyle,
Principal,
OKyle Parking
Consultancy

Changing habits along with the rise of technology were driving changes in the parking sphere.

The global growth in parking marketplaces was opening up new opportunities for companies to identify vacant parking spaces in nearby residential complexes which was further reducing the demand for traditional public car parks.

How can public parking help your staff get back to work?

Car park operators realize that they have an important role to play in facilitating the return to offices.

"The parking industry has taken very aggressive steps to make sure sanitization is being utilized."



Jeff Okyle,
Principal,
OKyle Parking
Consultancy

Sanization has come front and centre as car park operators try to demonstrate to commuters that they can use their facilities safely.

Most operators are regularly wiping down any surfaces which are touched by humans. While there is a growing drive towards contactless parking solutions.

This is all with the aim of creating a safe environment to cater for any spike in employee parking demand which occurs when offices begin to reopen around the world.

How will public parking help staff commute in the future?

Car parks are set to change dramatically in the future.

The medium-term will see car parks become focal points for multiple forms of mobility. EV charging points, bike & scooter storage will become commonplace in car parks facilitating a broader range of commuting.

Although private car ownership is predicted to decline as a percentage of population, population growth means that overall car ownership is still expected to grow.

In the longer-term as society moves towards autonomous vehicles, parking efficiency will massively increase. Research from the University of Toronto shows that autonomous car parks will be able to park 62% - 87% more cars in an average car park.

The increase in parking efficiency will pose challenges for public car parks relationships with local employers, many of whom will be able to streamline their own car parks to manage all their parking needs on-site.

It will also lead to the growth of multi-purpose spaces which can be used for parking at peak times but can repurposed as recreational or public spaces at times when parking demand is low.



PUBLIC TRANSPORT SOLUTIONS
SHUTTLE BUSES - CARS
PARKING MANAGEMENT
CAR SHARING - E-BIKE

How Can Public Transport Help?

Past: The default primary commuter method for a growing cohort of urban commuters

Present: Getting millions of front-line employees to work across the world

Future: Increased adoption of technology restores commuter confidence

How did public transport help commuters pre-COVID?

Public transport has been undergoing a visible explosion in popularity across the world. In 2017, public transport systems around the world carried 53bn passengers, an increase of 9bn journeys from 2012.

This was having a massive impact on how commuters were getting to work particularly in Central Business Districts. As countries looked to decarbonise travel, investment in public transport was growing across the world.

The increasing availability of public transport complimented with the growth of micro-mobility was making it easier and more practical for employees to take mass transit to work as opposed to a single occupancy car.

The increasing prevalence of public transport was making quality transit links a key factor

for employers when considering office locations.

How can public transport help your staff get back to work?

In most countries public transport has never stopped. Day after day during the pandemic mass transit operators have been getting front line workers to their places of work ensuring that key services remained unaffected during the crisis.

However, there has been considerable challenges. As social distancing became prevalent across the world, a hesitancy emerged for many people about using shared transport. In 2020 alone, EU public transport operators forecast a €40bn drop in revenues.

"Public transport networks should be seen as part of society's plumbing, something you need if the rest of society

is going to function. We must restore passengers' faith and protect these networks for the short, medium and long-term."



James McCarthy
Head of
Operations,
Cityswift

Public transport operators are responding to this uncertainty with increased investment in sanitization and technologies which improve the public experience.

Learnings from Asia show that as the world emerges from lockdowns, cities can expect public transport demand to return to 60%-80% of pre-lockdown volumes in the short-term.

This remains to be seen in Europe as we get to grips with the impact working from home as a long-term option has on long term journey demand.

How will public transport help staff commute in the future?

Public transport will return and eventually in most cities across the world will grow to become the primary commuter method for workers. The question is how this will look.

Most experts agree that in the medium-term with social distancing still a concern that

staggered commuting will become more widespread. This will see society move away from ubiquitous 9-5 working hours and spread peak transport times more evenly across the day.

Increased focus on responsive timetables which alter based on demand, real-time arrival data and integrated fares across multiple mobility services will help drive increased demand.

While an overarching increase in the green consciousness will ensure that public transport will return as a staple for commuters across the world.

"COVID-19 may have put public transport into a state of crisis, but strategic investment that enable our industry to become increasingly dynamic and adaptable will ensure that public transport returns as the first choice for passengers"



Sarah McCartan,
Head of Insights,
Cityswift



CARSHARING SOCIAL D

SHUTTLE BUSES - CARS

PARKING MANAGEMENT

CAR SHARING - E-BIKE

How Can Carsharing Help?

Past: A growing way for people to get about during their working day

Present: A transport mode for people who are beginning to return to business as normal

Future: Taxi apps as the focal point for multi-modal journeys

How did carsharing help commuters pre-COVID?

The majority of carsharing operations around the world are two-way. This means that the car needs to be returned to its place of collection or at least to the general area. This has limited the growth of carsharing as a primary commute mode.

A growing realization among employers that many people were driving to work because they needed their car for work reasons during the day, had been leading to strong growth in the corporate space.

Many employers were contracting carsharing companies to provide pool cars on-site enabling people to leave their cars at home and share vehicles for getting out and about. This was also helping to reduce taxi spend and had clear environmental benefits.

"It's not efficient use of road space for people to be driving individual vehicles to

and from work. No city now really could sustain this growth moving forward"



Carl Pittam
Director of
Development
UbeeQo

How can carsharing help your staff get back to work?

Carsharing has seen significant reductions in amount of corporate users using pool cars as offices across the world have been shuttered by lockdowns.

As people begin to return to offices, they were doing so in a world where limiting social contacts is advised. As a result, employees are very conscious of only taking necessary work journeys.

Now as employees understand better how to live safer alongside the virus they are starting to restart important business activities which had potentially been postponed. This is leading to an increase in carsharing numbers from

corporate audiences.

How will carsharing help staff commute in the future?

There is a long term trend of people moving away of private ownership of vehicles in developed economies.

This is something which can be expected to continue in a post-COVID world particularly in urban centres. As public transport continues to improve the necessity to own a car as a primary commute method will reduce.

"I think road space will continue to be reprioritized which will lead to less private vehicles parked on our streets"



Carl Pittam
Director of
Development
Ubeeqo

People will continue to decide to get rid of their cars and to use carsharing schemes when they really need a vehicle.

In turn carsharing schemes will embrace electrification and continue to aggressively roll-out modern fleets which reduce the carbon footprint of car usage.



TAXIS SOCIAL DISTANCING

SHUTTLE BUSES - CAR

PARKING MANAGEMEN

CAR SHARING - E-BIK

How Can Taxis Help?

Past: A luxury or emergency way to get to work faster

Present: An alternative to public transport for infrequent commuters

Future: Taxi apps as the focal point for multi-modal journeys

How did taxis help commuters pre-COVID?

Taking a taxi to work would have been a regular occurrence for a small number of affluent commuters. However, a much larger cohort of commuters would have taken a cab to work infrequently e.g. poor weather or when running late.

Traditionally taxis would have been used quite heavily by professionals during the working day as they looked to move from meeting to meeting. This trend would have been changing slowly as workers started to make shorter journeys via shared bikes and e-scooters for environmental, health and time management reasons.

From a commuter management perspective the biggest formal role taxi's played for many companies was out of hours commuting and emergency ride homes schemes.

Basically employees who were working at times when public transport were not available were provided with taxis to support their commute.

This was particularly useful for companies who wanted to reduce driving to work. By guaranteeing staff a ride home if they were too late for public transport they removed a major barrier for staff reluctant to leave the car at home.

How can taxis help your staff get back to work?

The taxi industry has been very quick to assuage concerns around safety within the industry. Most large-scale taxi companies are insisting that all drivers wear masks, cars are sanitized between each usage and screens are erected between driver and passengers.

As cities try to get back to work, commuters are slowly starting to get back into taxis.

“Commuter business was non-existent for the first three or four months of COVID. However, as companies start to return of offices we are starting to see a surge in demand”



**Luke Mackey,
Country Manager,
Bolt**

The world of work has changed, many argue forever. It is hard to see companies rushing back to five days a week in the office for all staff. While swallowing the cost of transporting staff to work everyday might be eye-watering for many businesses. The prospect of paying for, or subsidizing taxis for staff to come to the office once or twice a week may seem more manageable.

“People are worried about getting back on public transport, this is where taxis and other solutions are going to start becoming more popular. With less people on the roads and people hesitant to take public transport, we’re going to see an increase in people driving to work or taking taxis on the days they need to go”



**Luke Mackey,
Country Manager,
Bolt**

How will taxi’s help staff commute in the future?

The world’s largest taxi apps like Uber and Bolt recognize that mobility is going to change moving forward. They are not simply content with being taxi companies. They are looking to become multi-modal focal points.

By rolling out e-bikes and e-scooters, taxi apps are looking to become your go to app when you need to go anywhere. For short journeys you grab an e-scooter or e-bike while for longer journeys you can grab a cab.



E-SCOOTERS SOCIAL D

SHUTTLE BUSES - CAR

PARKING MANAGEME

CAR SHARING - E-BIK

How Can E-Scooters Help?

Past: An emerging transport mode for short journeys in urban centres

Present: Substitute for shuttle buses for short journeys

Future: A mainstream way for commuters to finish multimodal journeys

How did e-scooters help commuters pre-COVID?

Most city centre workers will have spotted a high-tech commuter whizzing to work over the last few years on an e-scooter. In spite of some much publicised regulatory difficulties, e-scooters have been heralded in recent years as a missing piece in the mobility puzzle.

“E-scooters have emerged as a last-mile solution which can connect people between public transport links and their destinations”



Will O'Brien,
Head of Growth,
Zipp Mobility

With an average journey length of 0.75km - 2km, e-scooters had emerged as a last-mile solution which made the final stages of a commute quicker for public transport users. E-scooter advocates point to ease of use and speed as two key benefits. While the ability to hop on an e-scooter without

working up a sweat was highlighted as a clear benefit by many. As regulation differs from city to city, early e-scooter adoption would have been heaviest among private users. However, as cities began to embrace the potential of e-scooters, many companies started to do direct deals with suppliers to provide and maintain private fleets.

These e-scooter fleets would generally have been used to enhance workday mobility as opposed to commuting.

Replacing taxis as a method of employees getting out and about to meetings in urban centres.

How can e-scooters help your staff get back to work?

As with many micro-mobility solutions, e-scooter adoption is closely linked to public transport usage. However, e-scooter may still play a role for companies who are looking at alternatives to shuttle buses.

Shuttle buses have grown in popularity over recent years for companies. However, with certain employees having concerns around communal transport, e-scooters could be primed to help them complete the final leg of their journey.

“Since the outbreak of COVID, e-scooters are proving to be of real value to employers. Where traditionally an out of town employer might have run a shuttle bus, they now realize that a bespoke fleet of scooters can be a safer and more efficient way to transport people when the infrastructure is right”



**Will O'Brien,
Head of Growth,
Zipp Mobility**

Companies can engage directly with e-scooter companies for a bespoke service. Key benefits of a direct relationship with a company include increased control over availability of vehicles for employees and maintenance.

How will e-scooters help staff commute in the future?

There is an image of e-scooter users as young, hip commuters who work in cutting edge technology firms. This is

changing rapidly. Moving forward e-scooters are going to become a commuter staple for all employees.

While urban dwellers will invest in e-scooters for their regular commutes, suburban commuters will embrace e-scooter sharing companies to get to offices faster and easier at the end of their public transport journeys.

“In the long-term, confidence in public transport will return. This will see e-scooters evolve as a key last mile solution with less of a focus on replacing other transport modes and more of a focus on increasing speed and efficiency”



**Will O'Brien,
Head of Growth,
Zipp Mobility**



BIKES, E-BIKES

BIKE SHARING

PARKING MANAGEME

CAR SHARING - E-BIK

SOCIAL

CARSHA

How Can Bikes, E-Bikes & Bike Sharing Help?

Past: An increasing popular way to get to work in urban centres

Present: Substitute for carpooling and public transport for shorter journeys

Future: A healthy and accessible way to commute longer distances

How did bikes, e-bikes and bike sharing help commuters pre-COVID?

Bike sharing has caught on rapidly in most cities over the last 10 years. Being able to easily pick up and jump on a bike has made a lot of journeys quicker and easier.

In a workplace context, like most micro mobility solutions, bike sharing had traditionally supported the last-mile of commutes and workday journeys.

“Pre-COVID, our average trip time was 15 minutes, people who were primarily moving in and around city centres. Heading from public transport to their final destination or going to and from meetings”



Hugh Cooney
CEO,
BleeperBike

In a lot of cities, docked bike sharing schemes were adopted quickest. This greatly limited the range of journeys for commuters as bikes needed to be returned to stations which were generally located centrally.

Likewise, the style of bike tended to be quite robust which made them challenging to cycle longer distances.

How can bikes, e-bikes and bike sharing help your staff get back to the office?

Many major cities like Vancouver and Berlin took the opportunity over lockdown to invest heavily in cycling infrastructure. This has made a massive difference to cyclist safety, and getting on your bike to work is now a lot more appealing.

Most companies can expect to see significant bumps in the numbers of staff cycling to

work and should invest in upgrading cycle storage and changing facilities accordingly.

“Since COVID we’ve seen the market widen. People who weren’t previously cycling have now taken up cycling as they’ve seen the risks of being on crowded buses & trains”



Hugh Cooney
CEO,
BleeperBike

Bike sharing schemes aren’t currently set up to cater for large-scale commuting. Obviously docked bike sharing users are geographically restricted but dock-less providers also discourage cycling over 4km or so.

Introducing internal bike sharing schemes can definitely help staff get around easier during the workday, particularly on bigger campuses. However, the role of bike sharing in the short-term is likely to remain quite similar to its role pre-COVID, as a potential replacement for shorter carpool and public transport journeys.

How will bikes, e-bikes & bike sharing help staff commute in the future?

The next big progression for biking to work is e-bikes. Currently a major drawback for many commuters who’d like to cycle to work is distance and fitness.

However, e-bikes are going to change this for a lot of people. They go further and faster. E-bikes are quite easy to charge and can be done by individual users without the need for large infrastructural investment like that needed for e-cars.

E-bikes will also bring a new dimension to bike sharing schemes by opening up the suburbs to commuters.

“E-bikes will definitely help with commutes of 8km and downwards, going forward I see sharing schemes containing a lot more electric bikes”



Hugh Cooney
CEO,
BleeperBike



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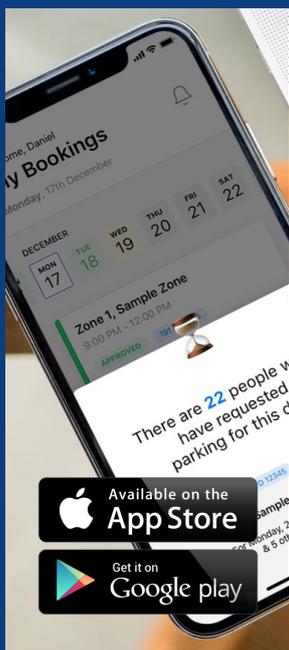
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