

2014 Center City Commuter Mode Split Survey Survey Results



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1 Project Overview

Commute Seattle is a not-for-profit Transportation Management Association (TMA) working to ensure commuters live more and drive less by improving access and ability to and within downtown. Founded in 2004, Commute Seattle is led by a partnership between the Downtown Seattle Association, King County Metro, and the Seattle Department of Transportation.

This study is conducted to understand how commuters travel to Downtown Seattle and how those behaviors shift over time. Commute Seattle has replicated this study every two years, with this 2014 study tracking the results from previous versions conducted in 2012 and 2010. These past iterations of the study were conducted by the Gilmore Research Group which was based in Seattle and ceased operations in 2013.

For the 2014 mode-split study, Commute Seattle hired EMC Research to conduct a survey of commuters to worksites located in Seattle's Center City neighborhoods and measure the mode share among employees who commute to work between morning peak hours (6 a.m. to 9 a.m.) on weekdays. This report combines the data from this 2014 mode-split study with data from Washington State Department of Transportation's (WSDOT's) survey of employees at larger Center City businesses affected by the State of Washington's Commute Trip Reduction (CTR) Efficiency Act. This report reflects the data collected from commuters to CTR-affected worksites throughout the 2013-2014 survey cycle.

For this report, the data from WSDOT's survey will be referred to as the CTR-affected commuter group while the data from Commute Seattle's mode-split study will be referred to as the Non-affected commuter group.

2 Summary of Methodology

2.1 Sampling

The 2014 mode-split survey data collected data from a total of 1,541 employees at non-affected worksites in Seattle's Center City neighborhoods. This sample is comprised mostly of small and medium-size worksites (1-99 employees) and some larger (100+ employee) worksites that are not affected by WSDOT's CTR program.

A full Center City business list and estimated worksite population counts were provided by Infogroup. This was a comprehensive list of businesses in each pre-defined Center City neighborhoods and included location and mailing address, manager name, phone number and the approximate number of employees at each worksite. A map of the Center City neighborhood boundaries is shown on page 25 of the appendix.

A random sample of worksites was pulled in the estimated proportions of commuter populations and worksite sizes in each neighborhood. The sample was stratified by neighborhood and business size category (1-4, 5-9, 10-19, 20-49, 50-99 and 100+) to approximate the estimated proportions of these groups in the final results.

2.2 Data Collection

EMC partnered with Burien-based Consumer Opinion Services and Boston-based Bernett Research for the data collection phase of the 2014 mode-split study.

Prior to fielding the study, EMC mailed each sampled worksite with 5 or more employees a pre-notification letter for the study. This letter was addressed from Commute Seattle and it notified businesses about the upcoming study and encouraged them to participate. The letter also included details about the survey objectives, timeline and participation incentives. The full text of the pre-notification letter is shown on page 30.

The following week, the sampled worksites were contacted by phone to confirm their business name, address and worksite size. This call also established the best employee to assist as the survey coordinator at each site. These employees were then screened and recruited to distribute the questionnaire to all employees at their respective worksites. The coordinator screening questionnaire is shown on page 31 and 32.

Survey coordinators were then given instructions for distributing the survey, and up to two subsequent reminders, to all employees at their worksite address in Downtown Seattle. Upon completion, coordinators at worksites with 50 or more employees were given a \$50 VISA gift card for their help. Coordinators at worksites with 10-49 employees were entered into a random drawing for one of 10 \$50 VISA gift cards while coordinators at worksites with fewer than 10 employees were entered into a separate drawing for one of 20 \$25 VISA gift cards. The prize drawings were held in late November.

Depending on each worksite's preference, the mode-split survey was administered as either an online or print survey among worksites with 5 or more employees. Survey coordinators who opted for the online version were sent an invitation email with a unique survey link for each worksite. Those requesting the print version of the survey were sent a packet with enough questionnaires for everyone at their worksite to complete plus a prepaid return envelope to send the completed surveys back for data entry.

2.2 Data Collection (Continued)

For worksites with 1 to 4 employees, live telephone interviews were conducted using a computer-assisted telephone interview (CATI) program. Quotas were set within neighborhood groupings and additional referral questions were asked to get as many employees available at each worksite to complete the survey. No incentives were offered to telephone survey participants.

The survey instrument covered six questions and asked respondents to recall their commute information for the prior week. These questions included the commute modes used each day, the number of people they typically carpool with, whether or not the week was a typical week for commuting, whether they commuted during weekday peak hours (6-9am, Monday through Friday), one-way commute length between home and work (in miles) and their home 5-digit zip code. The full survey text can be found on page 33.

The goal of the 2014 survey was to compare commute behavior to the 2012 mode-split data. EMC replicated the methodology, questionnaire formats and timing of the 2012 study as closely as possible. Accordingly, data was collected for both years' versions of the mode-split study during similar periods of the year. The 2014 study was fielded during the week of October 27th, 2014 to capture commute data for the week of October 20th, 2014, plus some additional clean-up interviewing the following week (which captured commute data for the week of the 27th). For reference, the 2012 study was conducted during the week of October 29th, 2012 and collected commute data about the week of October 22nd, 2012.

There were some notable weather and traffic-related factors which may have impacted commutes during the week of the mode-split data collection. During the week that mode-split data was collected for, the average daily highs were in the mid-60s and average lows in the mid-50s. Precipitation was heavy, with a daily average of 0.4 of an inch of rain and a total of 2.8 inches over the week. There were also two notable traffic incidents on Monday, October 20th, where a collision between two semi-trucks on southbound I-5 near Northgate and another collision that partially blocked the Mercer St. on-ramp to northbound I-5 resulted in extended backups during the early morning commutes into Seattle.

Lower gas prices are an additional factor with possible impacts on both the CTR-affected WSDOT data and the mode split data. In 2014, average gas prices in the Seattle area were about \$3.24 per gallon during the - October 2014 survey period, a decline from the \$3.80 average in October 2012, when the previous iteration of the mode-split survey was conducted. Gas prices fluctuated between \$3.30 and \$4.02 during the 2013-2014 survey period when the CTR-affected data was collected.

2.3 Weighting and Analysis

All completed mode-split surveys were reviewed for completeness and consistency. Once all of the data was entered and verified, data from the paper surveys was cleaned and merged with the phone and online data to create a full dataset for the Non-CTR affected worksites. Cases where survey coordinators completed the survey without distributing it to the other employees at their worksites were removed from the dataset. A total 1,541 interviews were included in the final non-affected dataset.

The Non-affected data was then merged with WSDOT's CTR-affected employee dataset, consisting of 49,975 total interviews among Center City employees, to create a combined dataset reflecting all commuters to Center City. The WSDOT data includes commuters from large CTR-affected worksites with 100 or more employees in the Center City and was collected throughout 2013 and 2014. The full WSDOT CTR-affected survey questions are shown on page 34 and 35 of the appendix. However, only a few of these variables were used for this analysis including commute mode share, commute distance and home zip code.

To better approximate the larger universe of Center City commuters, the final survey data was weighted to the reported WSDOT CTR employee counts and the estimated Infogroup counts of Non-affected commuters. The weighting and response rate tables for each neighborhood are on page 28 and 29 of the appendix.

Because a significantly lower portion of Non-affected interviews (n=1,541) were collected compared to CTR-affected interviews (n=49,975), a traditional unweighted n and margin of error are not applicable for the combined results of both respondent groups. Instead, the effective n estimates the adjusted number of interviews as if the CTR-affected and Non-affected respondents were interviewed proportionally. The effective margin of error is based on this effective n and is reported for various respondent subgroups throughout this report.

3 Weekday Mode Share

The results in this report reflect the trips of CTR-affected and Non-affected respondents who started work between 6 a.m. and 9 a.m. on at least one weekday (Monday – Friday) during the survey period. Over four-fifths of Center City employees (85%) indicated they started work on at least one weekday between the morning peak hours. Those who did not start work during any morning peak period on a weekday (15%) have been omitted from the following results in sections 3 through 7. The commute mode share for each mode of transportation is calculated out of all commute trips made during the weekdays prior to the survey period.

3.1 Overall Weekday Mode Share

The overall weekday trip shares for each specific travel mode are shown in Figure 3-1 below. The category totals for aggregated SOV, transit and non-motorized modes are also shown on the right side of the chart. For the purposes of this report, the total Single Occupancy Vehicle (SOV) category includes the combined percentage of drive alone, motorcycle and ferry boardings with a vehicle. The transit category includes all trips made by bus, rail (including Sounder and Link Light Rail) and walk-on ferry boardings. The non-motorized total includes all trips made by walking and bicycling as well as commute trips avoided by telecommuting and having compressed workweek days off (i.e. four 10 hour days in lieu of five eight hour days). Finally, the rideshare total includes carpool and vanpool trips.

Of the specific travel modes, bus is the most-used (37.9%) followed by drive alone (30.1%). Carpool (8.3%), walking (6.9%) and rail (5.4%) also make up sizeable portions of overall weekday trips. Total SOV modes combine for nearly a third (31.2%) of all weekday trips, while public transit (bus, train, ferry walk-on) combine for just under half (45.3%) of weekday peak trips.

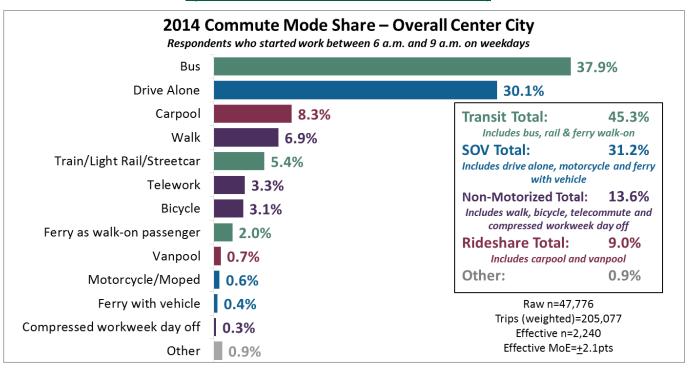


Figure 3-1 – 2014 Commute Mode Share – Overall Center City

^{*} Please note that due to rounding, some percentages may not add up to exactly 100%.

Q1. Last week, what type of transportation did you use each day to commute to your usual work location?

The aggregated SOV trip share dropped between 2012 and 2014 (34.2% to 31.2%; a 3.0% decrease). The overall share of transit trips grew between 2012 and 2014 (43.1% to 45.3%; a 2.2% increase) among Center City weekday peak commuters. The non-motorized total increased slightly (+0.9%) while there was no significant change for the total rideshare or other categories since 2012.

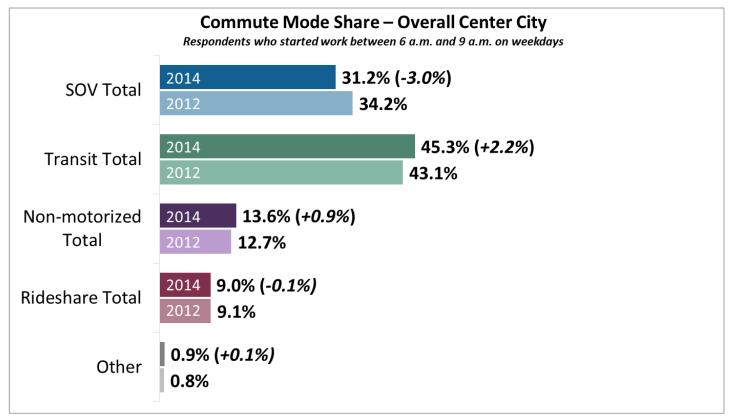


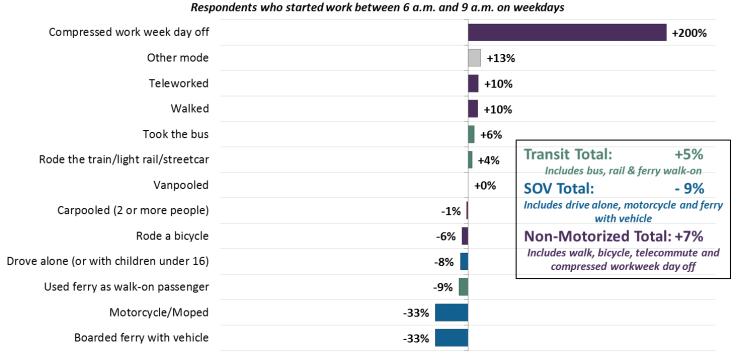
Figure 3-2 - Overall Mode Share (2012 to 2014)

3.2 Relative Shift from 2012 to 2014

While the overall share of trips *not* taken due to compressed work weeks is still very small (0.3%), the reported percentage has tripled (+200% since 2012). The reported shares of motorcycle/moped (0.6%) and drive-on ferry (0.4%) trips are also very small but each dropped by a third (-33%). The relative portion of carpool and vanpool trips remain virtually unchanged from two years ago.

Figure 3-3 - Relative Share Change Per Mode (2012 to 2014)

Relative Share Change Per Mode (2012 to 2014)



4 CTR-Affected & Non-Affected Mode Share

4.1 Comparing CTR-Affected to Non CTR-Affected Worksites

Table 4-1 below shows the absolute portion of weekday trips for each mode, overall and among commuters from CTR-affected and Non-affected worksites, with comparisons between 2012 and 2014. All mode share portions are reported based on the weighted number of total trips between Monday and Friday and are reported for commuters who started work during the morning peak period (between 6 a.m. and 9 a.m.) on at least one weekday.

Those commuting to smaller, non CTR-affected worksites are primarily responsible for the downward shift in the SOV total (41.2% -> 33.5%; a 7.7% decrease) and the increase in the transit total (36.7% -> 43.8%; a 7.1% increase).

Commuters to larger CTR-affected worksites in the Center City took SOV modes at a slightly increased rate between 2012 and 2014 (26.6% ->28.2%; a 1.6% increase). While the portion of transit trips remains the most frequently-used mode among this group, its share also dropped since 2012 (50.2% -> 47.2%, a 3.0% decrease).

Beyond the shifts in transit and SOV usage, the shares of other modes have not changed significantly since 2012. Walking (+0.6%) and telecommuting (+0.3%) saw slight upticks while the share of bicycle trips slightly declined (-0.2%). All of these variances are within the effective margin of error (+/- 2.1%) for Center City commuters.

Commute Mode Share - Weekday Trips by CTR-affected/Non-affected Respondents who started work between 6 a.m. and 9 a.m. on weekdays Overall CTR-affected Non-affected 2014 2012 2014 2012 2014 2012 Non-CTR-affected Overall 182.057 113.642 Weighted Approx. # of Trips (Trips_w) 205,077 85,970 96,087 affected

Table 4-1 – Weekday Trip Mode Share by Overall, CTR-affected and Non-affected Commuters (2012 to 2014)

Raw n	47,776	48,221	from 2012	46,527	46,672	Change from 2012	1,249	1,549	Change from
Effective Margin of Error (MoE)	<u>+</u> 2.1 pts		7101112012	<u>+</u> 0.5 pts	<u>+</u> 0.5 pts	2012	<u>+</u> 2.8 pts	<u>+</u> 2.5 pts	2012
SOV Total	31.2%	34.2%	-3.0%	28.2%	26.6%	+1.6%	33.5%	41.2%	-7.7%
Transit Total	45.3%	43.1%	+2.2%	47.2%	50.2%	-3.0%	43.8%	36.7%	+7.1%
Non-motorized Total	13.6%	12.7%	+0.9%	12.9%	11.2%	+1.7%	14.1%	14.0%	+0.1%
Bus	37.9%	35.7%	+2.2%	39.3%	42.1%	-2.8%	36.9%	29.9%	+7.0%
Drive alone	30.1%	32.7%	-2.6%	27.1%	25.4%	+1.7%	32.5%	39.3%	-6.8%
Carpool	8.3%	8.4%	-0.1%	9.2%	9.6%	-0.4%	7.5%	7.3%	+0.2%
Walk	6.9%	6.3%	+0.6%	5.7%	5.0%	+0.7%	7.8%	7.5%	+0.3%
Train/Light rail/Streetcar	5.4%	5.2%	+0.2%	5.8%	5.6%	+0.2%	5.0%	4.8%	+0.2%
Telework	3.3%	3.0%	+0.3%	3.9%	3.4%	+0.5%	2.8%	2.6%	+0.2%
Bicycle	3.1%	3.3%	-0.2%	3.0%	2.7%	+0.3%	3.2%	3.8%	-0.6%
Ferry as walk-on passenger	2.0%	2.2%	-0.2%	2.1%	2.5%	-0.4%	1.9%	2.0%	-0.1%
Vanpool	0.7%	0.7%	0.0%	1.4%	1.2%	+0.2%	0.2%	0.3%	-0.1%
Motorcycle/Moped	0.6%	0.9%	-0.3%	0.7%	0.8%	-0.1%	0.6%	1.0%	-0.4%
Ferry with vehicle	0.4%	0.6%	-0.2%	0.4%	0.4%	0.0%	0.5%	0.9%	-0.4%
Compressed workweek day off	0.3%	0.1%	+0.2%	0.2%	0.1%	+0.1%	0.3%	0.1%	+0.2%
Other	0.9%	0.8%	+0.1%	1.0%	1.2%	-0.2%	0.8%	0.5%	+0.3%

4.2 2012 to 2014 Mode Share Shifts

The chart below summarizes the absolute shifts in the total commute mode categories from the previous table in Table 4-1. Commuters to smaller, non CTR-affected worksites showed a 7.7% decrease in SOV Total (41.2% to 33.5%) and a 7.1% increase in Transit Total (36.7% to 43.8%). Commuters to larger, CTR-affected worksites showed a 1.6% increase in SOV Total (26.6% to 28.2%) and a 3-point drop in Transit Total (50.2% to 47.2%).

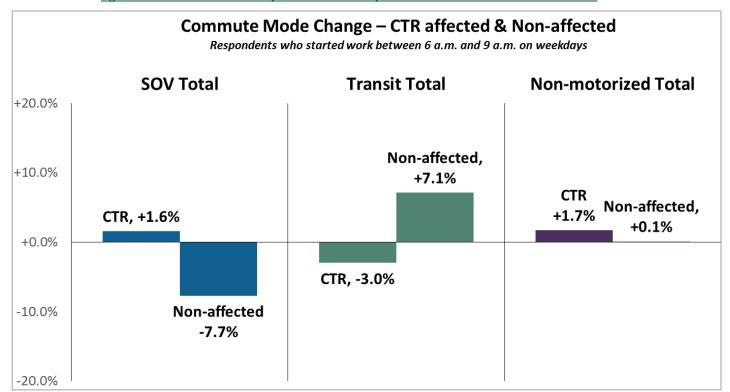


Figure 4-1 – 2012 to 2014 Weekday Mode Share Shift by CTR-affected and Non-affected Commuters

5 Subgroup Comparisons of Mode Share

5.1 Mode Share by Worksite Size

The figure below shows the weekday mode share by worksite size, which is split into small (1-19 employees), medium (20-99) and large (100+) categories for comparison. There are notable differences in mode usage based on employee worksite size.

Generally, commuters to mid-size (20-99 employee) worksites have similar mode preferences to those going to larger, 100+ employee worksites; nearly half (48-49%) of both groups use transit and just over a quarter (27-30%) use an SOV mode. A point of differentiation for those commuting to large worksites is they are the most likely to use rideshare modes like carpool or vanpool.

Commuters to small (<20 employee) worksites are far more likely to take SOV (41%) but less likely to use transit (32.5%) compared to employees at medium and large worksites. Small worksite commuters are also more likely to walk (9%) or ride a bike (4%) modes (17%).

Respondents who started work between 6 a.m. and 9 a.m. on weekdays Overall 1 to 19 Employees 20 to 99 Employees 100+ Employees **SOV Total: 31.2%** 41.4% 30.4% 27.3% Transit Total: 45.3% 32.5% 48.2% 49.2% Non-motorized Total: 13.6% 17.4% 12.8% 12.4% 37.9% Drove alone 40.1% Bus 41.3% 41.2% Drove alone 30.1% Bus 26.1% Drove alone 29.6% Drove alone 26.2% 8.7% Walk 8.3% Walk Carpool Carpool 8.9% Walk 6.9% Carpool 8.0% Carpool 7.3% Rail 6.0% Rail Telework 5.0% Rail 5.4% Walk 5.6% 5.4% 3.3% Rail 4.0% Telework Bicycle 3.3% Telework 3.7% Bicycle Ferry passenger Bicycle 3.1% 3.6% 1.5% Bicycle 2.8% Ferry passenger 2.4% Telework 1.2% 2.1% Ferry Passenger 2.0% Ferry passenger Vanpool 0.7% Motorcycle 0.7% Cmp. day off 0.5% Vanpool 1.2% Ferry with vehicle Motorcycle Motorcycle 0.6% 0.6% 0.4% Motorcycle 0.7% Ferry with Vehicle Cmp. day off 0.1% Ferry with vehicle 0.4% Ferry with vehicle 0.4% 0.3% Cmp. day off 0.3% Vanpool 0.0% Vanpool 0.4% Cmp. day off 0.2% Other Other Other 0.9% 0.6% 0.8% Other 1.0% Effective n=2,240 n=419 n=626 Effective n=1,395 Effective MoE=+2.1 pts MoE = +4.8MoE = +3.9Effective MoE=+2.6

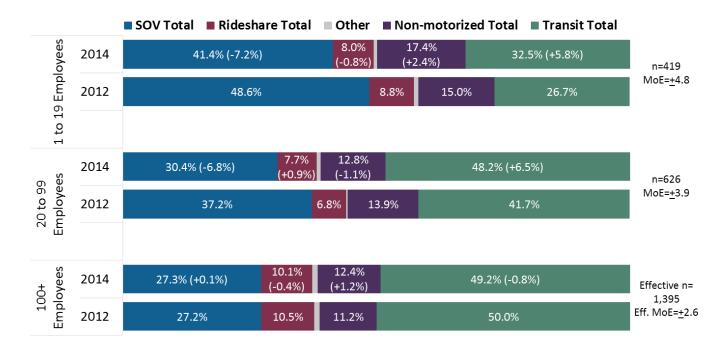
Figure 5-1 – Weekday Mode Share by Worksite Size

5.2 2012 to 2014 Comparison by Worksite Size

The following table shows how the weekday mode shares between small (<19 employees), medium (20-99) and large (100+) worksites have changed since 2012. There was significant growth in transit usage among commuters to both small (+6%) and medium (+6.5%) size worksites while their share of SOV trips (-7%) has dropped since 2012. There has been little shift in weekday mode share among employees to large (100+) worksites since 2012. Finally, the Rideshare category is comprised of total carpool and vanpool trips and did not change significantly among any of the worksite commuter groups.

Figure 5-2 – Mode Share by Worksite Size – 2012 and 2014 Comparison

Respondents who started work between 6 a.m. and 9 a.m. on weekdays



5.3 Individual Mode Share by Destination Neighborhood

The table below shows a comparison of weekday mode share of trips by commute destination neighborhood. The leading commute preferences – bus and driving alone – vary significantly by destination neighborhood. Commuters predominantly take the bus for their weekday trips to Belltown (43%), the Commercial Core (47%), Denny Triangle (36%) and Pioneer Square (42%) worksites. These also tend to be neighborhoods located along the arterial pathways of many transit routes that run through Downtown Seattle and are more likely to have more frequent, direct services to other areas in and outside of the city.

Employees commuting to areas where parking may be cheaper/less scarce or areas with less direct transit access from outside of Downtown – including Chinatown/International District (45% SOV), First Hill (39%), South Lake Union (45%) and Uptown (53%) -- are more likely to drive alone; commuters are also most likely to carpool (10.0% or higher) to these neighborhoods. Train usage – including Sounder and Link Light Rail – is most common for those making trips to Pioneer Square (11%) and International District (9%), the neighborhoods closest to King Street Station.

Please note that, due to varied number of interviews (n) in each subgroup, the effective margin of error varies between neighborhoods and is highest for Uptown (MoE= \pm 12.3 percentage points) and Pioneer Square (MoE= \pm 9.1 pts).

Table 5-1 – Individual Mode Share by Center City Neighborhood

ı	Weekday Mode Share by Destination Neighborhood Respondents who started work between 6 a.m. and 9 a.m. on weekdays								
	Overall	Belltown	Chinatown ID	Commercial Core	Denny Triangle	First Hill	Pioneer Square	South Lake Union	Uptown
Effective n	2,240	252	202	627	241	336	116	401	64
Effective MoE	<u>+</u> 2.1%	<u>+</u> 6.2%	<u>+</u> 6.9%	<u>+</u> 3.9%	<u>+</u> 6.3%	<u>+</u> 5.3%	<u>+</u> 9.1%	<u>+</u> 4.9%	<u>+</u> 12.3%
SOV Total	31.2%	25.4%	45.5%	22.5%	28.9%	40.1%	27.3%	45.9%	53.2%
Transit Total	45.3%	51.0%	38.5%	56.0%	41.8%	38.1%	57.5%	27.6%	16.9%
Non-motorized Total	13.6%	17.6%	5.3%	13.2%	18.6%	7.2%	10.6%	13.5%	14.6%
Took the bus	37.9%	42.9%	27.5%	47.2%	35.9%	32.3%	41.9%	24.0%	15.5%
Drove alone	30.1%	25.0%	44.7%	21.3%	27.7%	38.7%	25.9%	44.7%	52.7%
Carpooled	8.3%	5.3%	10.0%	6.7%	9.3%	11.8%	4.0%	10.5%	13.9%
Walked	6.9%	10.5%	2.6%	6.7%	9.2%	4.3%	3.3%	6.6%	6.9%
Rode the train/light rail/streetcar	5.4%	5.9%	8.8%	6.4%	4.8%	4.3%	10.7%	2.8%	0.9%
Teleworked	3.3%	3.1%	1.0%	3.3%	4.5%	1.4%	1.8%	2.3%	5.8%
Rode a bicycle	3.1%	3.8%	1.3%	3.0%	4.6%	1.3%	4.6%	4.3%	1.8%
Used ferry as walk-on passenger	2.0%	2.2%	2.2%	2.4%	1.1%	1.4%	4.9%	0.8%	0.5%
Vanpooled	0.7%	0.2%	0.2%	0.5%	0.8%	1.7%	0.1%	1.8%	0.9%
Motorcycle/Moped	0.6%	0.2%	0.6%	0.8%	0.5%	0.7%	0.1%	0.7%	0.4%
Boarded ferry with vehicle	0.4%	0.1%	0.1%	0.4%	0.6%	0.7%	1.3%	0.4%	0.2%
Compressed work week day off	0.3%	0.3%	0.5%	0.2%	0.2%	0.2%	1.0%	0.3%	0.1%
Other	0.9%	0.5%	0.5%	1.2%	0.7%	1.2%	0.4%	0.8%	0.5%

5.4 Aggregated Mode Share by Destination Neighborhood

To complement the previous table in section 5.3, the figure below shows the aggregated mode categories within each Center City destination neighborhood. The neighborhoods in the top half of the graph are where SOV modes make up a plurality of weekday trips while the neighborhoods in the lower half primarily commute by transit.

Respondents who started work between 6 a.m. and 9 a.m. on weekdays ■ SOV Total
■ Rideshare Total
■ Other
■ Non-motorized Total
■ Transit Total Effective MoE Uptown 53% 15% 15% <u>+</u>12.3% South Lake Union 46% 12% 14% <u>+</u>4.9% Int. District 45% 10% <u>+</u>6.9% 5% First Hill 40% 13% 7% ±5.3% <u>+</u>2.1% Overall 14% Denny Triangle 29% 10% <u>+</u>6.3% 19% Pioneer Square 11% 27% <u>+</u>9.1% Belltown 25% 5% 18% +6.2% Commercial Core 23% 7% 13% <u>+</u>3.9%

Figure 5-3 - Aggregated Mode Share by Center City Neighborhood

5.5 Individual Mode Share by Home Geography

A plurality of commuters from all home areas (39% or higher) commute by bus except for those commuting from South King/Pierce – who are more likely to use light rail and Sounder (19%) – and those in Kitsap/Island Counties, who are most likely to ride the ferry (73%). Walking (12%) and biking (5%) are particular stand-outs among those commuting from within Seattle.

The share of drive alone trips is highest in the Eastside areas (37% or higher in Bellevue, Northeast and East King) though it does not reach a plurality of trips any home area. Carpooling also makes up a significant share of trips (10% or higher) in these areas.

Because the number of interviews (n) varies between the geographic areas below, the effective margin of error is larger for some subgroups. The effective margin of error is highest for the West ($MoE=\pm 12.0$ percentage points), Bellevue ($MoE=\pm 11.9$ pts) Northeast ($MoE=\pm 11.2$ pts) and East ($MoE=\pm 10.0$ pts) areas.

Table 5-2 – Individual Mode Share by Home Geography Area

Ri		•		•	eography	ekdays		
	Overall	Seattle	Bellevue	North	Northeast	East	South	West
Effective n	2,240	1,223	68	270	77	97	430	67
Effective MoE	<u>+</u> 2.1%	<u>+</u> 2.8%	<u>+</u> 11.9%	<u>+</u> 6.0%	<u>+</u> 11.2%	<u>+</u> 10.0%	<u>+</u> 4.7%	<u>+</u> 12.0%
SOV Total	31.2%	29.9%	39.9%	30.0%	38.2%	38.1%	34.7%	13.4%
Transit Total	45.3%	41.7%	42.7%	51.7%	41.7%	43.0%	50.6%	68.5%
Non-motorized Total	13.6%	19.8%	5.2%	4.8%	7.4%	4.4%	3.9%	13.4%
Took the bus	37.9%	39.2%	42.4%	47.2%	40.5%	42.9%	31.4%	5.7%
Drove alone (or with children under 16)	30.1%	29.2%	39.0%	28.6%	37.8%	37.7%	34.4%	3.0%
Carpooled (2 or more people)	8.3%	7.4%	10.8%	11.4%	10.9%	12.2%	8.6%	1.3%
Walked	6.9%	11.9%	0.6%	0.2%	0.1%	0.1%	0.1%	0.2%
Rode the train/light rail/streetcar	5.4%	2.5%	0.2%	4.4%	1.1%	0.1%	19.1%	0.4%
Teleworked	3.3%	2.7%	3.7%	3.8%	6.6%	3.8%	3.1%	7.4%
Rode a bicycle	3.1%	5.0%	0.8%	0.3%	0.2%	0.4%	0.4%	5.3%
Used ferry as walk-on passenger	2.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	62.5%
Vanpooled	0.7%	0.2%	1.2%	1.8%	1.6%	1.8%	1.1%	1.5%
Motorcycle/Moped	0.6%	0.6%	0.9%	1.3%	0.4%	0.3%	0.3%	0.5%
Boarded ferry with vehicle	0.4%	0.1%	0.0%	0.1%	0.0%	0.1%	0.1%	10.0%
Compressed work week day off	0.3%	0.2%	0.1%	0.5%	0.5%	0.1%	0.3%	0.5%
Other	0.9%	1.0%	0.3%	0.4%	0.3%	0.5%	1.0%	2.0%

5.6 Aggregated Mode Share by Home Geography

Figure 5-4 focuses on the aggregated mode categories and how they vary by commute origin. A plurality of commuters from all areas (42% or higher) use transit modes for their weekday trips. Total SOV trip share is highest in East King and Southcentral Snohomish (38% or higher in Bellevue, East or Northeast areas). The use of non-motorized travel modes is highest in Seattle (20%).

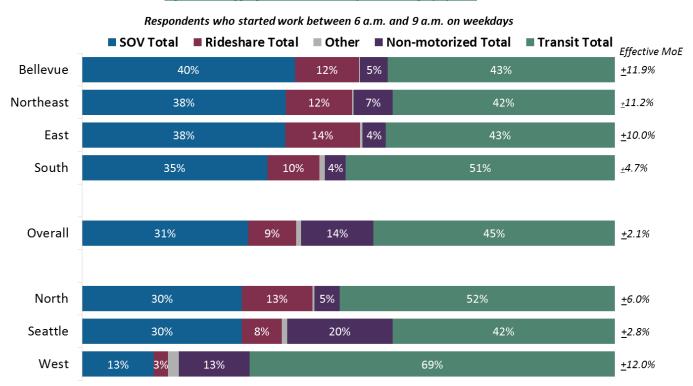


Figure 5-4 - Aggregated Mode Share by Home Geography Area

6 Home Geography

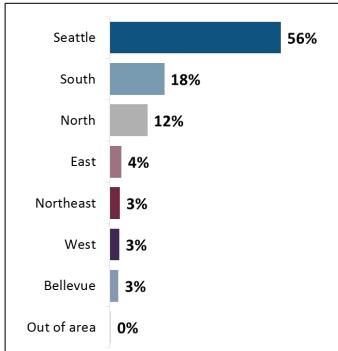
6.1 Overall Home Geography Breakdown

The map below shows the boundaries of each home geography region analyzed in this report. It provides a description of the particular cities and counties located within each area as well as the short-hand term used to refer to each area throughout this report. These geographic boundaries are based on zip code and are defined as they were in the 2012 study. A full list of the zip codes used to define each area is on page 27 of the appendix.

The chart on the right shows the overall breakdown of Center City weekday peak commuters coming from each home geographic area. Just over half (56%) of commuters come from within Seattle and the rest (44%) from outside the City, particularly South King/Pierce (18%) and North King/Snohomish (15%).



Figure 6-1 – Home Geography Area Map and Overall Commute Origin



Q6. What is the 5-digit zip code where you live? (RECORD 5-DIGIT ZIP CODE)

6.2 Home Geography by CTR-Affected and Non-Affected

The chart below compares the trip origins of commuters to both CTR-affected and Non-affected worksites. While the geographic distribution of both commuter groups is roughly similar, Non-affected commuters are more likely to come from within Seattle while larger portions of CTR-affected commuters travel from other areas outside the City.

Respondents who started work between 6 a.m. and 9 a.m. on weekdays **CTR-affected** Non-affected Overall 62% Seattle Seattle Seattle 49% 56% South 17% South 18% South 19% 10% North North 15% North 12% East 5% East East Northeast Northeast Northeast West West Bellevue Bellevue Bellevue Out of Out of Out of 0% 0% 0% Area Area Area Effective n=2,240 n=46,527 n= 1,249 Effective MoE=±2.1% MoE=±0.5% MoE=<u>+</u>2.8%

Figure 6-2 - Commute Origin of Overall, CTR-affected and Non-affected Commuters

Q6. What is the 5-digit zip code where you live? (RECORD 5-DIGIT ZIP CODE)

6.3 Home Geography by Center City Neighborhood

Table 6-1 shows commuters trip origins within each destination neighborhood. Nearly two-thirds of commuters to boutique neighborhoods including Belltown (67%), Uptown (64%) and Pioneer Square (62%) live within Seattle. By contrast, less than half (46% or lower) of those commuting to Center City's Southeast neighborhoods (International District and First Hill) live in the City. These two neighborhoods also have the highest portions of commuters (25% or higher) coming from areas south of Seattle.

Table 6-1- Commute Origin Within Center City Neighborhood

Home Geography By Center City Neighborhood Respondents that started work between 6 a.m. and 9 a.m. on weekdays Commercial Chinatown South Lake Denny **Pioneer** Belltown Triangle First Hill Overall ID Union Uptown Core Square Effective n 2,240 64 Effective MoE <u>+</u>2.1% <u>+</u>6.2% <u>+</u>6.9% <u>+</u>6.3% <u>+</u>5.3% <u>+</u>4.9% <u>+</u>12.3% 56% 67% 46% 53% 58% 44% 62% 57% 64% Seattle 3% 2% 5% 3% 3% 3% 1% 3% 1% Bellevue 12% 12% 14% 11% 16% 5% 12% 12% 12% North 3% 3% 4% 3% 5% 1% Northeast 1% 2% 3% 4% 3% 5% 4% 4% 4% 5% 4% 2% East 18% 12% 26% 17% 18% 25% 19% 17% 18% South 1% 3% 3% 3% 4% 2% 3% 7% 2% West 0% 0% 0% 0% 0% 0% 0% 1% 0% Out of Area Unknown/ 1% 0% 0% 1% 1% 0% 0% 1% 0% Ref

7 Commute Distance

7.1 Average Overall Commute Distance

Figure 7-1 below shows the average one-way commute distance for overall, CTR-affected and Non-affected commuters. Non-affected commuters tend to live closer to Downtown (11.8 average miles) than those who are CTR-affected (15.1). A majority of Non-affected commuters (56%) commute less than 10 miles while only two-fifths (43%) of CTR-affected commuters have short-distance commutes.

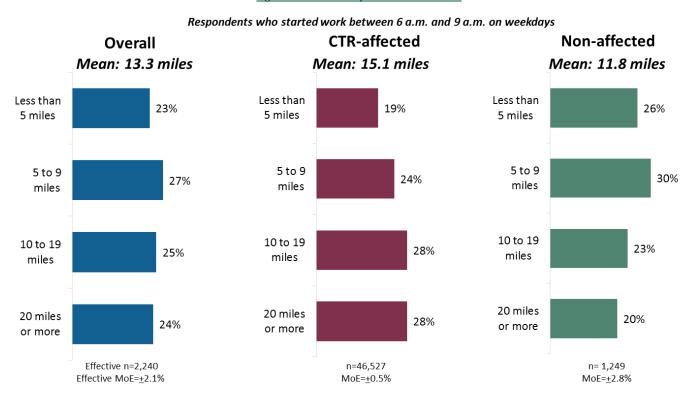


Figure 7-1 – One-Way Commute Distance

7.2 Commute Distance by Travel Mode

The chart below shows a comparison of the average number of one-way commute miles by travel mode. There is little difference between the commute distances of those who drive alone (13.3 average miles/one-way commute) and those who ride the bus (12.7). Commuters who use Sounder/Link (22.7) or telecommute (16.8) generally have the longest commutes to Downtown Seattle.

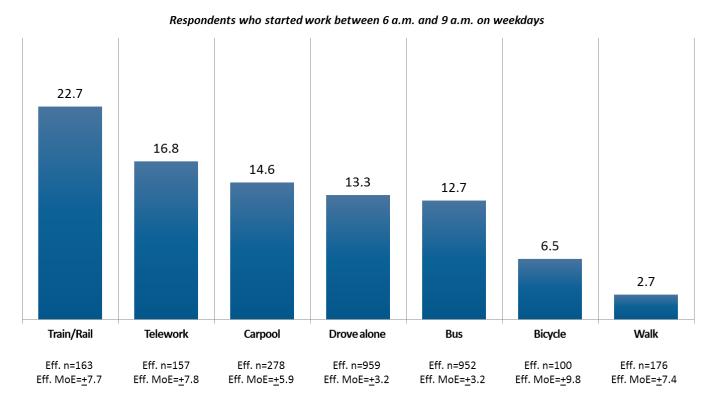


Figure 7-2 - Average One-Way Commute Miles by Commute Mode

The next chart shows the average one way commute miles to each Center City destination neighborhood. Commuters to the International District (15.7 average miles), First Hill (15.5) and Commercial Core (13.7) are generally coming from the furthest out while those in more residential-heavy neighborhoods — Belltown and Uptown (both 11.9) — have the shortest commutes.

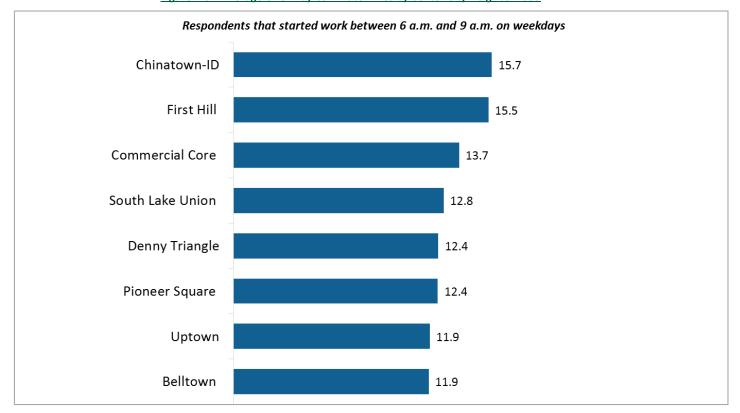


Figure 7-3 – Average One-Way Commute Miles by Center City Neighborhood

8 Appendix

8.1 Center City Neighborhoods

A map of the overall Center City boundary and its neighborhood subareas are shown in the map below:

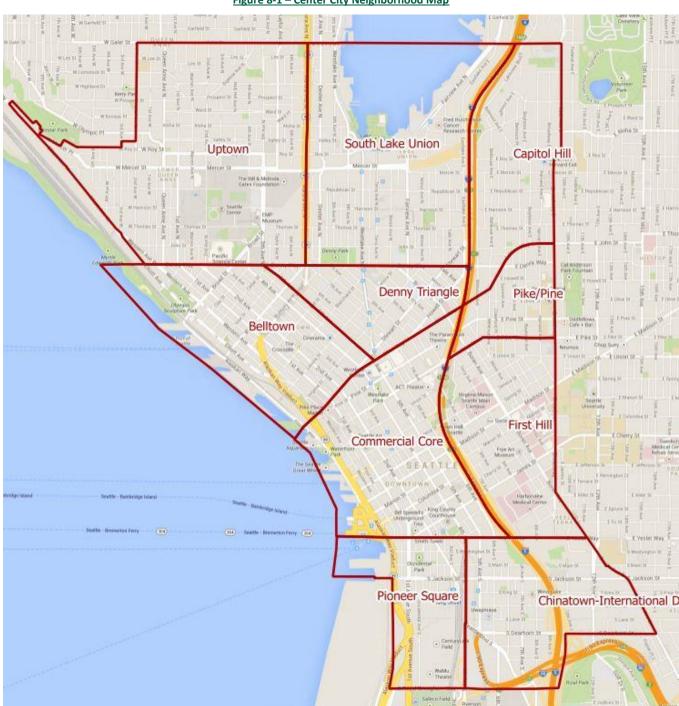


Figure 8-1 – Center City Neighborhood Map

8.2 Home Geography Zip Code Definitions

A map with descriptions of commuters' home geographic areas is shown in Figure 8-2 below and the zip code definitions of each area are listed in Table 8-1 on the next page.



Figure 8-2 – Home Geography Area map

Table 8-1 - Home Geography Zip Code List

Sea	ttle	Bellevue	No	rth	Northeast	East		South		West
98101	98125	98004	98011	98229	98014	98024	98001	98327	98445	98013
98102	98126	98005	98012	98230	98019	98027	98002	98328	98446	98070
98103	98129	98006	98020	98233	98052	98029	98003	98333	98465	98110
98104	98131	98007	98021	98236	98053	98040	98010	98338	98466	98310
98105	98133	98008	98026	98239	98072	98045	98022	98354	98467	98311
98106	98134	98009	98028	98247	98074	98050	98023	98360	98496	98312
98107	98136	98015	98033	98248	98077	98065	98025	98371	98498	98329
98108	98138	98039	98034	98249	98272	98075	98030	98372	98499	98332
98109	98139		98036	98251	98290	98802	98031	98373	98501	98335
98111	98144		98037	98252	98294	98815	98032	98374	98502	98337
98112	98145		98041	98253	98296	98826	98038	98375	98503	98339
98113	98154		98043	98257		98902	98042	98387	98506	98340
98114	98155		98046	98258		98926	98047	98388	98512	98342
98115	98164		98082	98260		98941	98051	98390	98513	98346
98116	98175		98083	98264		99003	98055	98391	98516	98353
98117	98177		98087	98270		99019	98056	98396	98532	98359
98118	98189		98201	98271		99026	98057	98401	98550	98363
98119	98195		98203	98273		99136	98058	98402	98558	98365
98121	98199		98204	98274		99163	98059	98403	98579	98366
98122			98208	98275		99204	98063	98404	98580	98367
			98221	98277		99205	98064	98405	98584	98368
			98223	98282		99206	98071	98406	98597	98370
			98225	98284		99216	98092	98407	98604	98376
			98226	98286		99224	98093	98408	98607	98380
				98292		99401	98146	98409	98662	98382
						99403	98148	98418	98682	98383
							98166	98422	98683	98384
							98168	98424	98718	98386
							98178	98433	98903	98392
							98188	98439	98922	98394
							98198	98443	98935	98395
							98321	98444	98938	98528
									98951	98588

8.3 Weighting

The estimated proportions of CTR-affected and Non-affected commuters were weighted within each Center City neighborhood, individually. Each neighborhood was also weighted to its total estimated proportion of the Center City universe. To minimize the effect that differences in these proportions between 2012 and 2014 may have on any observed differences in the survey results, the overall CTR-affected and Non-affected proportions were also adjusted -- from 46% CTR/54% NA to 40.5% CTR/59.5% NA – to match the overall proportions of these groups in the 2012 results.

Table 8-2 – CTR-affected and Non-affected Weighting Proportions

	Weighting – All Respondents											
			CTR-af	fected					Non-at	7,244 14.8% 4,284 14.0% 710 3.4% 973 3.2% 329 4.8% 1,449 4.7% ,216 42.0% 13,056 42.6% 165 6.5% 2,055 6.7% 464 5.0% 1,601 5.2% 749 8.0% 2,305 7.5% 696 7.9% 2,586 8.4% 445 7.7% 2,362 7.7%		
Neighborhood	Unwe	ighted	CTR C	ounts	Weig	hted	Unwe	ighted		•		
	n	%	N	%	n	%	n	%	N	%	n	%
Belltown	3,044	6.1%	3,800	4.0%	781	3.7%	267	17.3%	16,244	14.8%	4,284	14.0%
Capitol Hill/Pike-Pine	174	0.3%	842	0.9%	177	0.9%	32	2.1%	3,710	3.4%	973	3.2%
Chinatown ID	2,313	4.6%	2,513	2.7%	532	2.6%	167	10.8%	5,329	4.8%	1,449	4.7%
Commercial Core	23,976	48.0%	42,228	45.0%	9,292	44.6%	430	27.9%	46,216	42.0%	13,056	42.6%
Denny Triangle	5,853	11.7%	8,376	8.9%	1,872	9.0%	137	8.9%	7,165	6.5%	2,055	6.7%
First Hill	4,449	8.9%	9,051	9.6%	2,066	9.9%	165	10.7%	5,464	5.0%	1,601	5.2%
Pioneer Square	1,489	3.0%	1,979	2.1%	406	1.9%	119	7.7%	8,749	8.0%	2,305	7.5%
South Lake Union	5,560	11.1%	18,517	19.7%	4,290	20.6%	174	11.3%	8,696	7.9%	2,586	8.4%
Uptown	3,117	6.2%	6,550	7.0%	1,427	6.8%	50	3.2%	8,445	7.7%	2,362	7.7%
Overall	49,975	100%	93,856	46.0%	20,843	40.5%	1,541	100%	110,018	54.0%	30,673	59.5%

8.4 Non-CTR Affected Response Rates

Response rates for the non-affected Mode Split data were calculated based on the number of completed, usable surveys out of the total distributed. The overall response rate was 61% for non-affected worksites while minimum target response rate was 50%.

<u>Table 8-3 – Non-affected Worksite Response Rates by Neighborhood and Business Size</u>

Non-affected Worksite Response Rates						
	Surveys Distributed	Surveys Completed (n)	Response Rate %			
Overall Non-affected	2,520	1,541	61%			
Neighborhood						
Belltown	442	267	60%			
Capitol Hill/Pike-Pine	61	32	53%			
Chinatown ID	253	167	66%			
Commercial Core	689	430	62%			
Denny Triangle	274	137	50%			
First Hill	295	165	56%			
Pioneer Square	162	119	73%			
South Lake Union	278	174	63%			
Uptown	66	50	76%			
Business Size						
1 to 4	395*	236	60%			
5 to 9	189	136	72%			
10 to 19	291	207	71%			
20 to 49	456	324	71%			
50 to 99	744	410	55%			
100+ Not-Affected	474	227	48%			

^{*} Number of total reported employees at 1-4 worksites.

8.5 Pre-Notification Letter

COMMUTE SEATTLE







To whom it may concern:

Within the next week, an interviewer from Consumer Opinion Services and EMC Research, two experienced professional research firms in Seattle, Washington, will be calling your worksite and asking you to allow your employees to participate in a brief survey about how they commute to work. They will ask for help from you or someone who can distribute the survey to the employees at your worksite. Your participation will help support our continuing efforts to improve commuter options and access to downtown Seattle.

The survey will only take 2-3 minutes of each employee's time. It will ask what method of transportation employees used to get to work each day of the preceding week and the zip code they are traveling from.

This information will help Commute Seattle better understand trip behavior, and the effects of policies and investments which will lead to improved services for your employees, as well as reduce congestion on the roadways that provide access to downtown.

Participation in this survey is completely voluntary. Responses from your employees will be combined with those from other organizations to give us a complete picture of commute travel to downtown Seattle that will inform decisions about alternative forms of transportation, parking and other travel-related issues.

All survey responses are confidential and your employees' answers will not be associated with your company. If you have any questions you may contact the project manager Brian Vines at (206) 652-2454, ext. 4.

Thank you in advance for taking part in this research effort.

Sincerely,

Jessica Szelag Executive Director

www.CommuteSeattle.com

Commute Seattle is a not-for-profit commuter service organization working to reduce drive-alone commute trips and ensure commuters are knowledgeable about the variety of transportation options they have for getting to work in downtown Seattle. Commute Seattle is an alliance between the Downtown Seattle Association, King County Metro and the City of Seattle.

8.6 Survey Coordinator Screener

Survey Coordinator Screener Survey Worksite Employers Downtown Seattle

Hello, may I speak to [NAME ON LIST] or the manager at your worksite?
This is with Consumer Opinion Services in Seattle. I am calling on behalf of Commute Seattle and the Downtown Seattle Association. We are asking employers to help with a very short survey on how employees commute to work in the downtown area to support continuing efforts to improve commuter options and access to downtown Seattle. The survey involves having each employee from selected businesses fill out a short form about how they commute to work. Your employee can complete the forms online or can fill out a paper version. It should only take a minute or two for each person to do it. What we need is a contact person at your business who is willing to distribute and collect the surveys. For helping with this task, that person will also be entered in a drawing for one of several VISA gift cards. Are you the best person or would you recommend we talk with someone else?
[IF NEEDED: Your business was selected at random to represent other businesses of the same size, and it is very important that we ensure the employees at your worksite are represented in the data we're collecting]
Same person New person (reintroduce)
1) First, I just need to verify some information about your worksite.
Is your worksite name? (COMPANY NAME FROM SAMPLE)
And is your worksite located at
2) How many employees commute to this worksite? #
$\begin{array}{c ccccccccccccccccccccccccccccccccccc$
We have a very brief survey that we would like every employee at your specific worksite at [READ BACK ADDRESSS FROM Q1] to complete either online or on paper. The survey will only take a couple of minutes to complete and will as about their commute method each day last week. The actual survey distribution is taking place this week and we would send you the survey to distribute within the next day or so. Since this involves some effort to distribute the web survey or distribute the paper surveys to each employee and collect them again (READ APPROPRIATE ONE)
IF 49 OR FEWER EMPLOYEES:we are having a drawing that the people who helps distribute surveys at your worksite will be entered into. The drawing will be for: (READ APPROPRIATE ONE)
IF Q2=LESS THAN 10 EMPLOYEES: One of 20 VISA gift certificates valued at \$25
IF Q2=TEN OR MORE EMPLOYEES: One of 10 VISA gift certificates valued at \$50
Since we are only interviewing a sample of a few dozen local businesses, your odds of winning will be about one in five

IF 50 OR MORE EMPLOYEES: ...we will give the person who distributes surveys at your worksite a \$50 VISA gift card.

4)	emailing a link to the web version of the survey or distributing and collecting the paper version of the survey.
	Yes -> GO TO Q5 No - Is there someone else in your business that might be willing to do it? Yes => GET REFERRAL AND REINTRODUCE, THEN SKIP TO Q3 No => THANK AND TERMINATE
5)	Great! And to confirm, what is your major business activity? (READ LIST IF NEEDED)
	Retail Restaurant/Food Service Medical office Commercial office Government Personal service (i.e. beauty salon) Banking Childcare/daycare Other
6)	Would you prefer that we
	Send you a link to an online survey to send to each employee via email or
	IF ONLINE: We will need to distribute the online survey links when you receive them in the next day or so. We'll send you the survey link that morning as well as directions for distributing the surveys by email.
	Mail them to you?
	IF MAIL: We will need to distribute the paper surveys as soon as you receive them in the next day or so. We'll send you a postage paid self-addressed envelope for you to mail everyone's forms back to us.
	And should we send the survey packet to the same address you confirmed earlier or is there different address we should send them to? Yes, same address No, different address (FILL IN BELOW)
Thank y	ou so much for agreeing to do this. Is there anything else that we can do to make this easier for you?
Record	comment:
Let me	make sure I have your correct name and phone number:
Name	(VERIFY CORRECT SPELLING)
Phone_	
Fax	
Email We will	get this information out to you soon with detailed instructions and contact information in case you have questions.

8.7 Full Non-Affected Questionnaire - Print Version

6) What is the 5-digit zip code where you live?

Downtown Seattle Commuter Survey

Downtown	beattle Ct	minut	ei Suiv	еу				
DEAR DOWNTOWN SEATTLE EMPLOYEE: Commute Sea and the City of Seattle, is working with EMC Research and Conseattle to understand how you commute to work. Your particular and access to downtown Seattle. Please take a few minutes boxes like this: (Yes No)	onsumer Opi	inion Servelp suppo	vices to co	onduct a s	survey of fforts to in	employee mprove co	s in down	town ptions
1) Last week, what type of transportation did you use each Fill in ONLY ONE type of transportation per day If you used more than one type, fill in the type used Fill in "Carpooled" only if at least one other person as Fill in "Teleworked" if you eliminated a commute trip one-half as far from home as your usual work location, fill in how you got to your usual work location.	for the LON age 16 or old by working ton. If you te	GEST DI der was in at home,	STANCE the vehic at a Tele	cle work Cent	ter or at a	a Satellite		
	Mon	Tue	Wed	Thur	Fri	Sat	Sun	
	10/20	10/21	10/22	10/23	10/24	10/25	10/26	
	$\hat{\mathbb{T}}$	Ω	$\hat{\mathbb{T}}$	Ω	Ω	$\hat{\mathbb{T}}$	Ω	
Drove alone (or with children under 16)								
Carpooled (2 or more people)								
Vanpooled								
Motorcycle/Moped								
Took the bus								
Rode the train/light rail/streetcar								
Rode a bicycle								
Walked								
Teleworked								
Compressed workweek day off								
Overnight business trip								
Did not work (day off, sick, etc.)								
Boarded ferry with car/van/bus								
Used ferry as walk-on passenger								
Other:								
If you used a carpool or vanpool as part of your commusually in the vehicle, including yourself? Number of people in carpool/vanpool or on motor.	-	ou ride a	motorcy	cle, how ı	many pe	ople (age	16 or old	er) are
3) Was last week a typical week for commuting?	s □ No							
4) Last week, which days were you scheduled to begin w	ork betwee Mon	n 6 a.m. Tue	and 9 a.r Wed	-		it apply) Sat	Sun	None
	10/20	10/21	10/22	2 10/23	3 10/24	10/25	10/26	None
5) ONE WAY, how many miles do you commute from how > DO NOT use roundtrip or weekly distance > Include miles for errands or stops made daily on the > If you telework, report the miles from your residence > Round off the distance traveled to the nearest mile Miles you commute one way	e way to work	k	ork locati	ion?				

8.8 Full 2013-2014 CTR-affected Questionnaire

Trip Reduction	Employee Questionnaire
Reduction All questions refer to work for this employer only. Use a No. 2 pencil. Fill in the circles completely. Erase cleanly any marks you wish to change. Do not make any stray marks on the form. 1. Which of the following best describes your employment status? Full-time (35 hours or more each week) Part-time (20 to 34 hours each week) Part-time (less than 20 hours each week) 2. What days do you typically begin work between 6 and 9 a.m.? (Mark all that apply) Monday Tuesday Wednesday Thursday Friday Saturday Sounday None 3. ONE WAY, how many miles do you commute from home TO your usual work location? DO NOT use roundtrip or weekly distance. Include miles for errands or stops made daily on the way to work. If you telework, report the miles from your residence to your work location. Round off the distance traveled to the nearest mile. Write numbers in the boxes and fill in the corresponding circles.	4. Last week, what type of transportation did you use each day to commute TO your usual work location? If you used more than one type, fill in the type used for the LONGEST DISTANCE. Fill in ONLY ONE type of transportation per day. Fill in "Carpooled" only if at least one other person age 16 or older was in the vehicle. Fill in "Teleworked" if you eliminated a commute trip by working at a location less than half the distance from your usual work location. If you teleworked part of the day then went to your usual work location, fill in how you get to your usual work location. M T W Th F SoSu Drove alone (or with children under 16) Carpooled (2 or more people) Vanpooled Rade a motorcycle Rode a bicycle Walked Compressed workweek day off Overnight business trip Did not work (day off, sick, etc.) Boarded ferry as walk-on passenger Other: St you carpooled or vanpooled as part of your commute, or if you rode a motorcycle, how many people (age 16 or older) were usually in the vehicle including yourself? One person Nine people Three people Four people Five people Five people Five people Five people Five people Fitteen ar more people Fitteen or more people Fitteen or more people
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