Commute Seattle

2021 Seattle Center City Commute Mode Split Survey

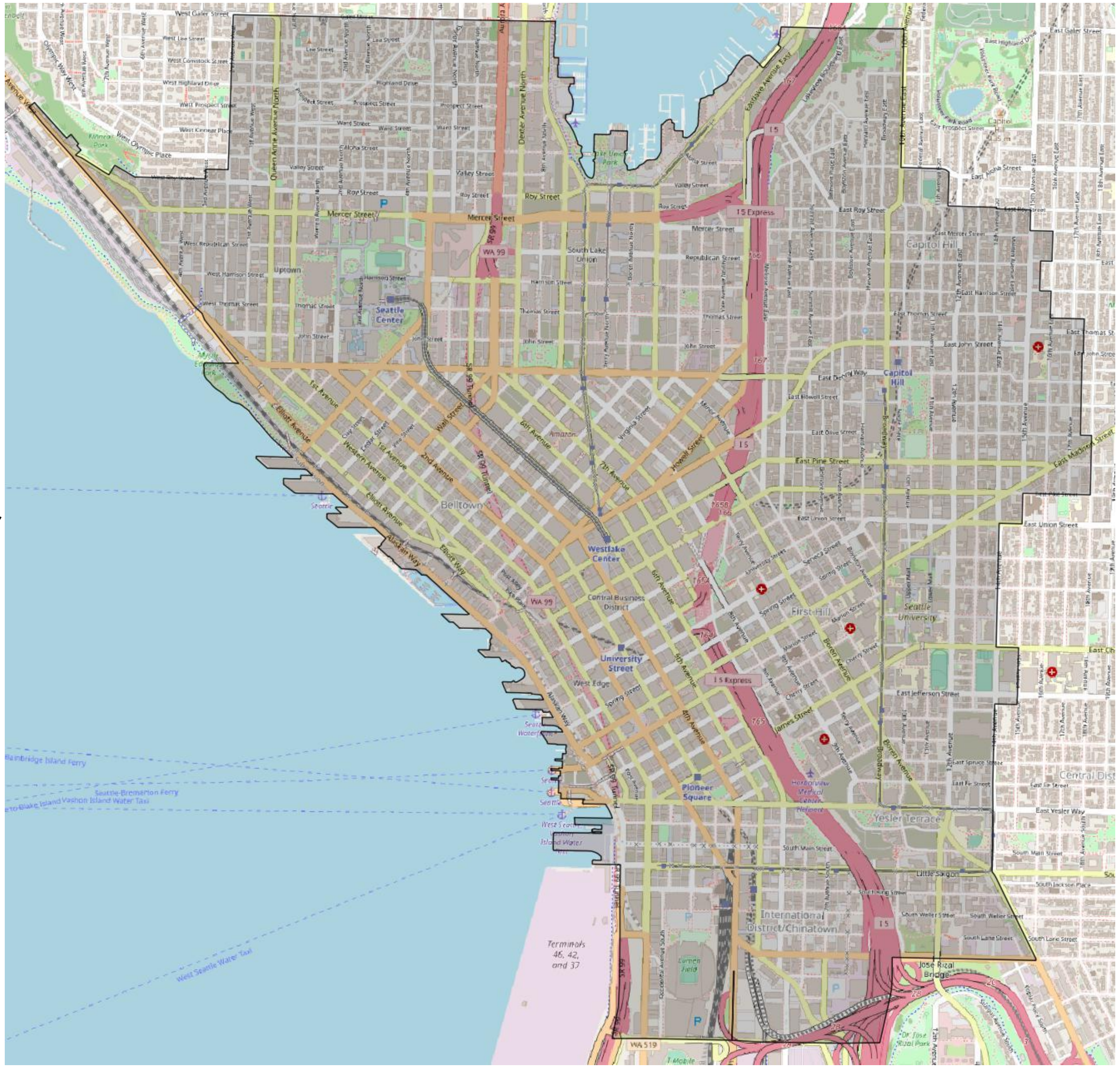
March 2022

EMC research

Overview

EMC research

- The purpose of this research is to track the travel behavior and attitudes of commuters to Seattle's Center City over time, including shifts in travel mode usage and non-commute trips.
- The 2021 survey was conducted amid the COVID-19 pandemic and its lingering impacts on commuting in Downtown Seattle and elsewhere. Commuter data collection took place between October 18th and November 28th, 2021.
- A total of 4,371 interviews were conducted from 263 participating worksites as part of the 2021 study.
  - 864 Non-affected employee interviews from 227 worksites
  - 3,387 CTR employee interviews from 32 participating worksites
  - 120 TMP employee interviews from 4 participating properties



Survey Topics

- In keeping with previous years, the study aims to identify the share of Downtown Seattle commuters who drive alone, ride transit, work remotely, carpool/rideshare, and take other forms of transportation which can be compared to years before the pandemic.
- The travel and mode split questions and codes have been revised to match similar changes in the upcoming version of WSDOT's Commute Trip Reduction (CTR) survey in 2022.
  - **Note:** the 2021 survey captured the *typical* modes used each day compared to previous years – 2019 and earlier – which captured the modes used each day of the preceding week from when respondents completed the survey. These differences should be noted for multi-year trend comparisons.
- Additionally, the 2021 Center City survey covered several new topics, including:
  - Availability, usage, and interest in transit subsidies, remote work benefits, flexible scheduling, and other benefits and incentives;
  - Perceptions of and interest in remote work and non-drive alone commute modes;
  - Reasons for driving alone and barriers to using non-drive alone commute modes.
- For the 2021 iteration, in addition to sampling and administering the survey among non-CTR-affected worksites traditionally included in this portion of the study, EMC also collected data from CTR worksites and TMP properties.

Methodology

Non-CTR affected worksites

- EMC worked with Data Axle USA (formerly InfoUSA) to acquire a full list of commercial worksites in the defined Center City area using pre-existing boundary definitions.
- After removing the worksites that were included in CTR and TMP programs, the non-affected sample list included 7,720 worksites, including 3,897 smaller workplaces with less than 5 employees.
- Through an 8-week recruitment period, all entries for worksites with 5 employees or more on the list were reached out to at least twice (excepting those who were successfully contacted on the first try).
- 286 were recruited as survey coordinators to distribute the survey.
- Of the 286 worksites recruited, we received completed surveys from 82 non-affected worksites with 5 employees or more, in addition to 154 smaller worksites where survey was administered via phone, yielding 864 completed non-affected surveys.

CTR-affected worksites and TMP properties

- EMC acquired a list of coordinators for CTR worksites and TMP properties from Commute Seattle.
- Coordinators were initially contacted via email for answering screening questions online, those who did not react to the email invite after a set of reminders were reached out to via phone.
- Of the 457 CTR worksites and 122 TMP properties included in the list, 48 and 10 agreed to participate in the study, respectively.
- We received completed surveys from 32 CTR worksites and 4 TMP properties, yielding 3,387 and 120 completed surveys, respectively.

Research Caveats

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Along with the more obvious challenges posed by the pandemic – including higher business and employee turnover – there are some additional research caveats for the 2022 study.

- **Worksite participation (NA):** As many worksites adopted work-from-home measures, and reduced office hours, contacting and recruiting coordinators to distribute the survey proved more challenging than previous years, resulting in fewer participating worksites of those that were sampled and contacted.
- **Worksite participation (CTR & TMP):** Many larger worksites affected by statewide Commute Trip Reduction and local Transportation Management Program efforts are traditionally required to participate in WSDOT's biennial CTR survey. Those worksites were sampled as part of the 2021 mode split survey. Given the voluntary nature of this research effort, a few dozen participated.
- **Employee survey participation:** Compared to previous iterations of the survey, response rates were lower among employees at larger worksites with 50 or more workers, especially among employees at CTR-affected worksites. The voluntary nature of the survey was also a factor the reduced response rates, as care was taken to avoid over-burdening respondents ahead of the next official CTR survey.
- **Employee subgroup size:** Due to the reduced participation rates in the 2021 survey; the overall, CTR, and non-affected results have higher margins of error compared to previous years where a larger breadth of data was collected for each worksite type.
- **Survey timing:** Conducted over several weeks in Fall 2022, the timing of the survey does not reflect the potential impact of the Omicron variant, as the spread of Omicron variant came to public attention shortly after the end of data collection.

Summary of Findings

- The COVID-19 pandemic has led to significant mode shifts among Downtown Seattle commuters, most importantly with a sizeable increase in remote work.
  - Despite making fewer physical commutes to Downtown Seattle worksites, the overall share of driving alone to work has remained comparable to previous years, reflecting a decrease among CTR-affected and an increase among non-affected commuters.
  - Transit usage saw the largest decline in mode share, while carpooling and vanpooling saw the largest relative percentage decline between 2019 and 2021.
- Employees at non-affected worksites are also making fewer commute trips than in 2019 but they commute far more often than their CTR counterparts. Many have gone from commuting daily to a few times a week rather than dropping their physical commutes altogether.
- CTR-affected employees in the survey have continued to make far fewer physical commute trips than before the pandemic as they generally have more remote work options available to them. About three-quarters expect to return to their commutes after the pandemic, and only a quarter expect to commute daily in the long run.
- Non-affected employees are also making fewer commute trips to Downtown compared to before the pandemic. However, the share of those commuting at least weekly is comparable to pre-pandemic levels; many have shifted from commuting every day to a few times a week.

Summary of Findings (Continued)

- The availability of and the unmet demand for commuter benefits differ between employees at CTR-affected and non-affected worksites, most notably around the availability of remote work options and employer-paid parking and transit.
- A vast majority of CTR-affected employees are currently offered remote work options and subsidies for public transit and most use them.
- About one-in-five CTR-affected and non-affected employees say public transit benefits are available but they do not currently use them. This will be a segment to monitor to see how many adopt transit as employers ramp up their in-office operations.
- Unmet interest in public transit benefits – that is, the concentration of those who are interested in using transit benefits but are not currently offered them – is greatest among small (1-9) and medium-size (10-49) non-affected worksites and retail workers.

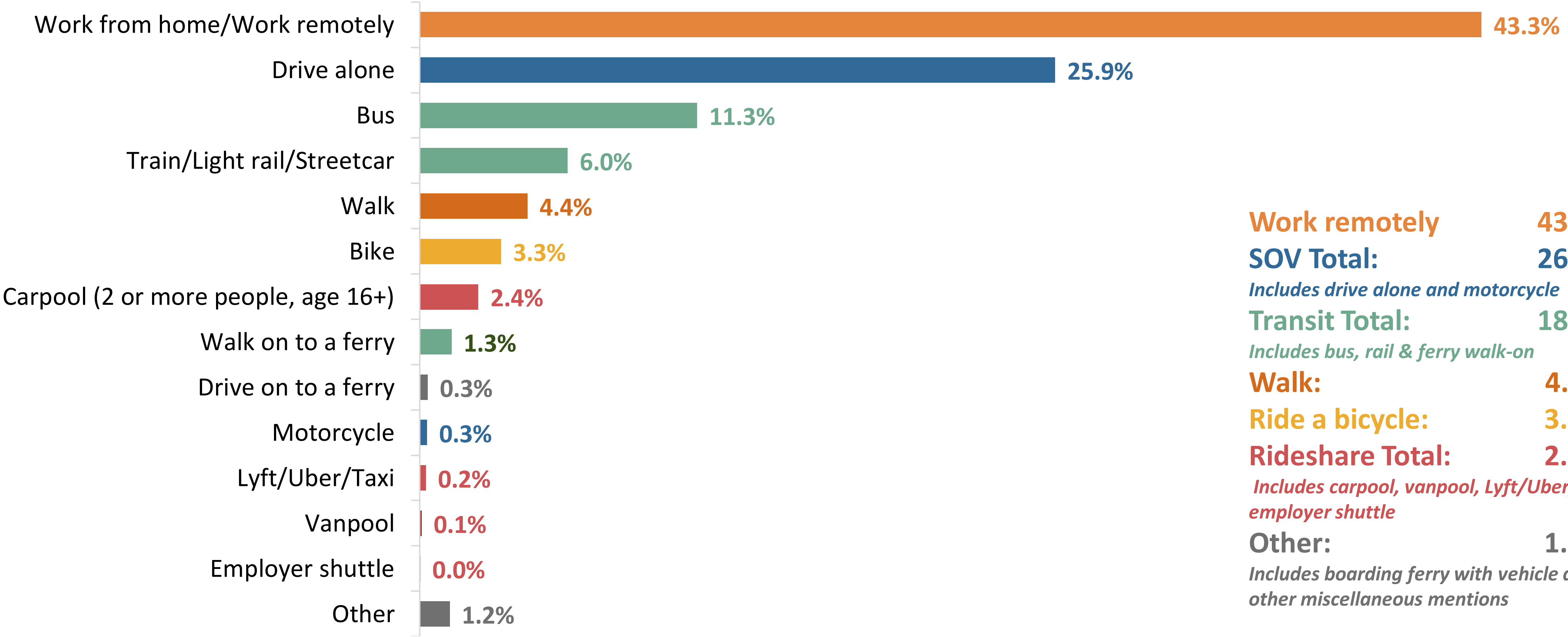
2021 All Commuters Mode Share Analysis (All Respondents)

Detailed Mode Share – 2021 Overall

Among all respondents commuting to Downtown Seattle worksites, more than two-in-five trips were replaced by remote work. One quarter of commute trips were drive alone, while nearly one-in-five were via public transit.

2021 Detailed Commute Mode Share – Overall Center City

All respondents



Work remotely	**43.3%**
SOV Total: *Includes drive alone and motorcycle*	**26.2%**
Transit Total: *Includes bus, rail & ferry walk-on*	**18.6%**
Walk:	**4.4%**
Ride a bicycle:	**3.3%**
Rideshare Total: *Includes carpool, vanpool, Lyft/Uber/taxi, employer shuttle*	**2.7%**
Other: *Includes boarding ferry with vehicle and other miscellaneous mentions*	**1.5%**

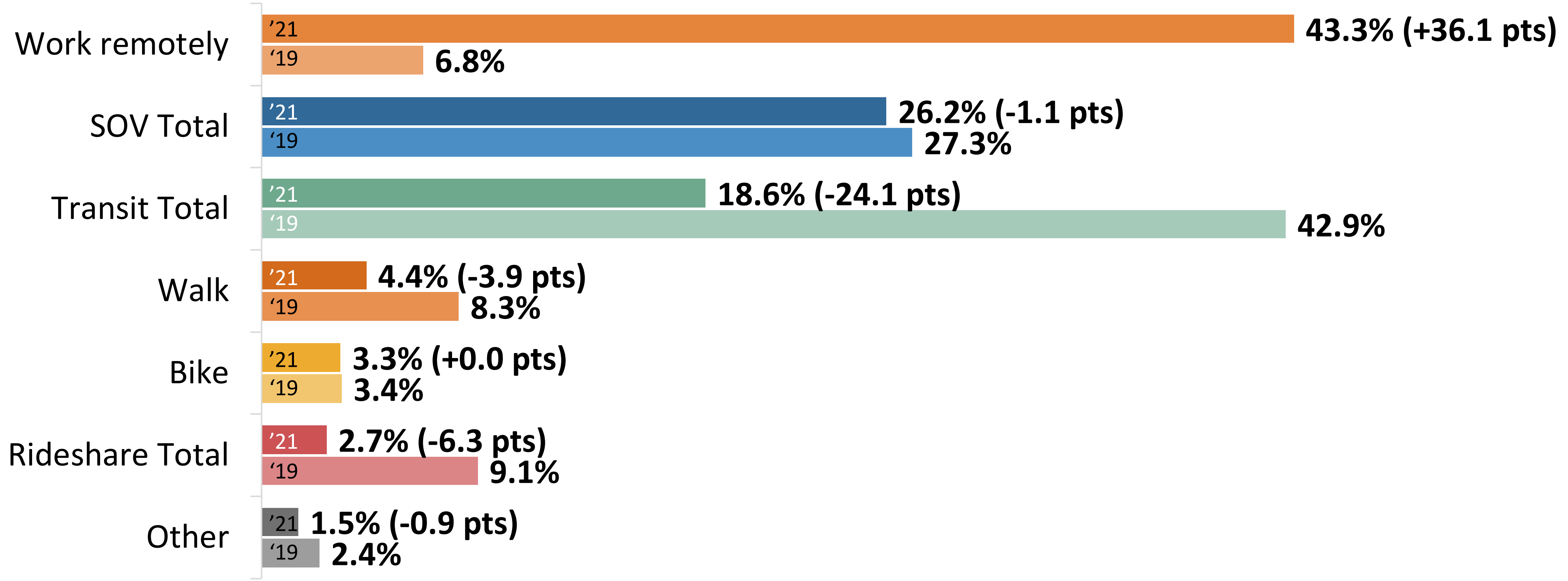
Q1. Currently, during a typical week, how do you get to work each day?

Overall Mode Share – 2019 & 2021

From 2019 to 2021, the share of remote work among all Downtown commuter modes increased by 36.5 points; while the shares of transit, walking and rideshare went down, and those of driving alone and biking remained flat.

Weighted n=1,337
Weighted MoE=±2.7 pts

2019 – 2021 Commute Mode Share Change – Overall Center City
All Respondents



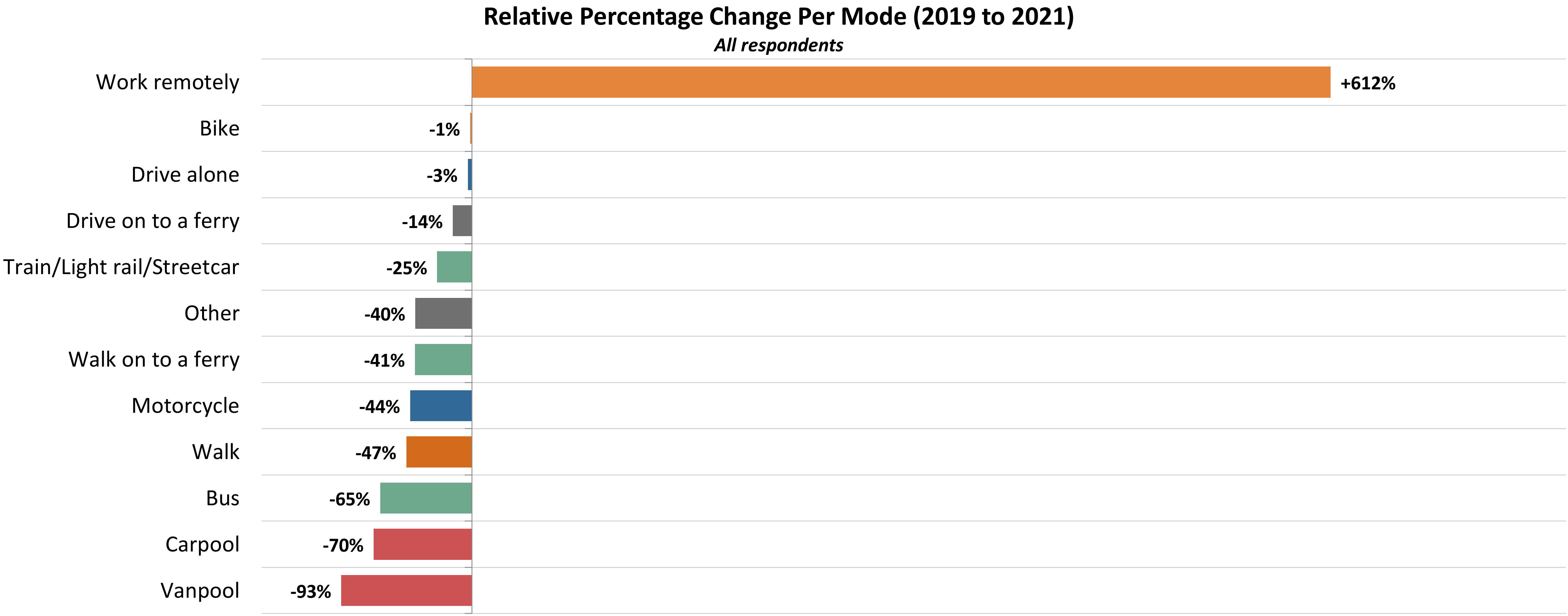
** **Note**: the 2021 survey captured respondents' <u>typical</u> modes used each day, compared to 2019, which captured the modes used each day of the preceding week from when respondents completed the survey. These differences should be noted for multi-year trend comparisons.*

Q1. Currently, during a typical week, how do you get to work each day?

**In previous iterations of the survey compressed workweek was combined with remote work*

Relative Change in Mode Share 2019-2021

The sharpest relative percentage decline happened in rideshare modes, carpooling and vanpooling.



* ***Note***: *the 2021 survey captured respondents' typical modes used each day, compared to 2019, which captured the modes used each day of the preceding week from when respondents completed the survey. These differences should be noted for multi-year trend comparisons.*

***In previous iterations of the survey compressed workweek and remote work were reported as a combined category*

Q1. Currently, during a typical week, how do you get to work each day?

Overall Mode Share by Worksite Type

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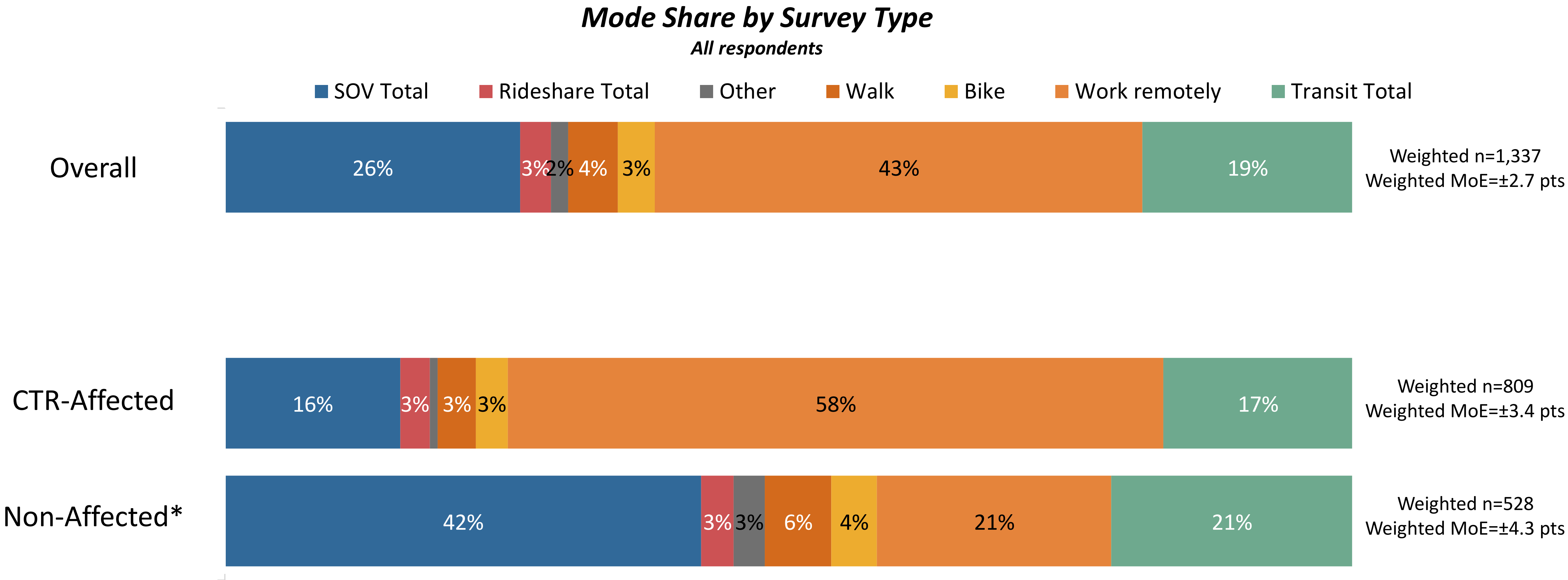
Remote work has a considerably higher mode share among employees at CTR-affected worksites (58%) than non-affected worksites (21%). Driving alone now makes up the plurality non-affected commuter mode split.



* *Worksites on TMP properties are reported combined with non-affected category.*

Q1. Currently, during a typical week, how do you get to work each day?

Commute Mode Share by Worksite Size/Category

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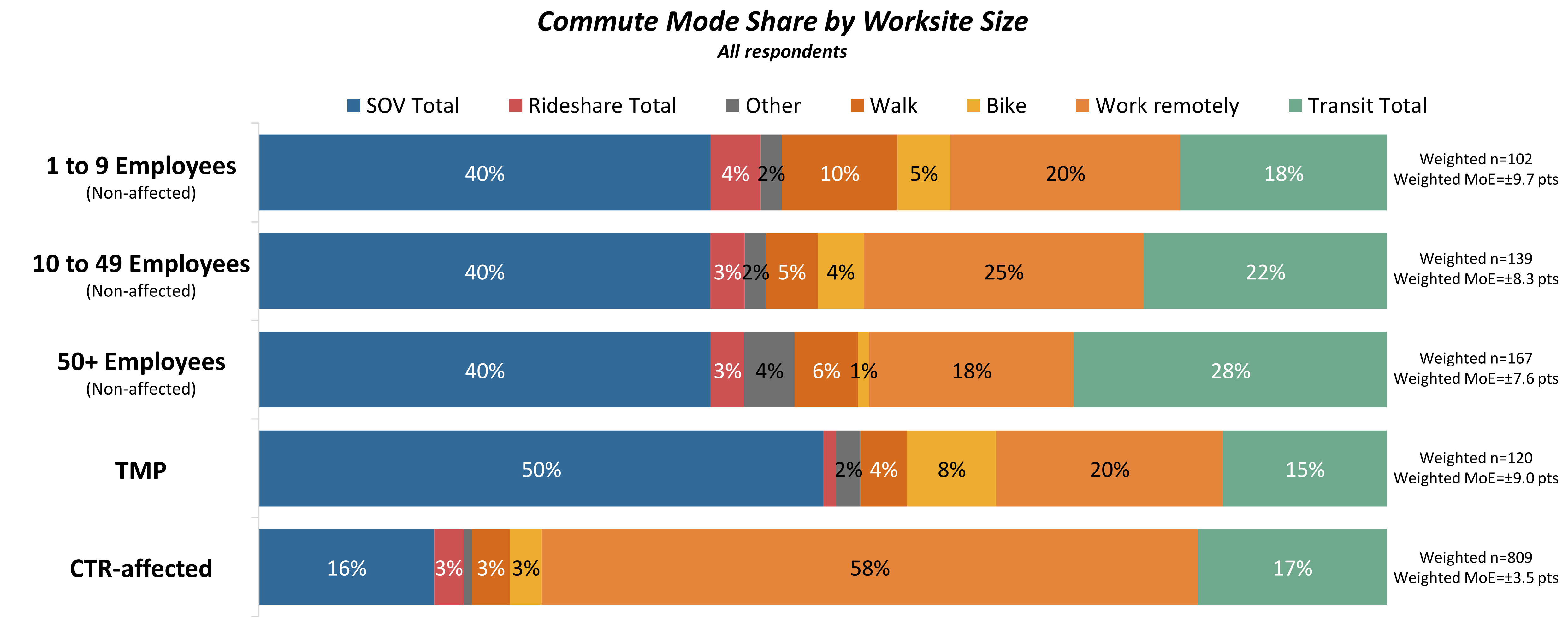
Remote work is significantly more common among employees at CTR-affected worksites, and driving alone to work has the highest mode share among other employees regardless of worksite size.

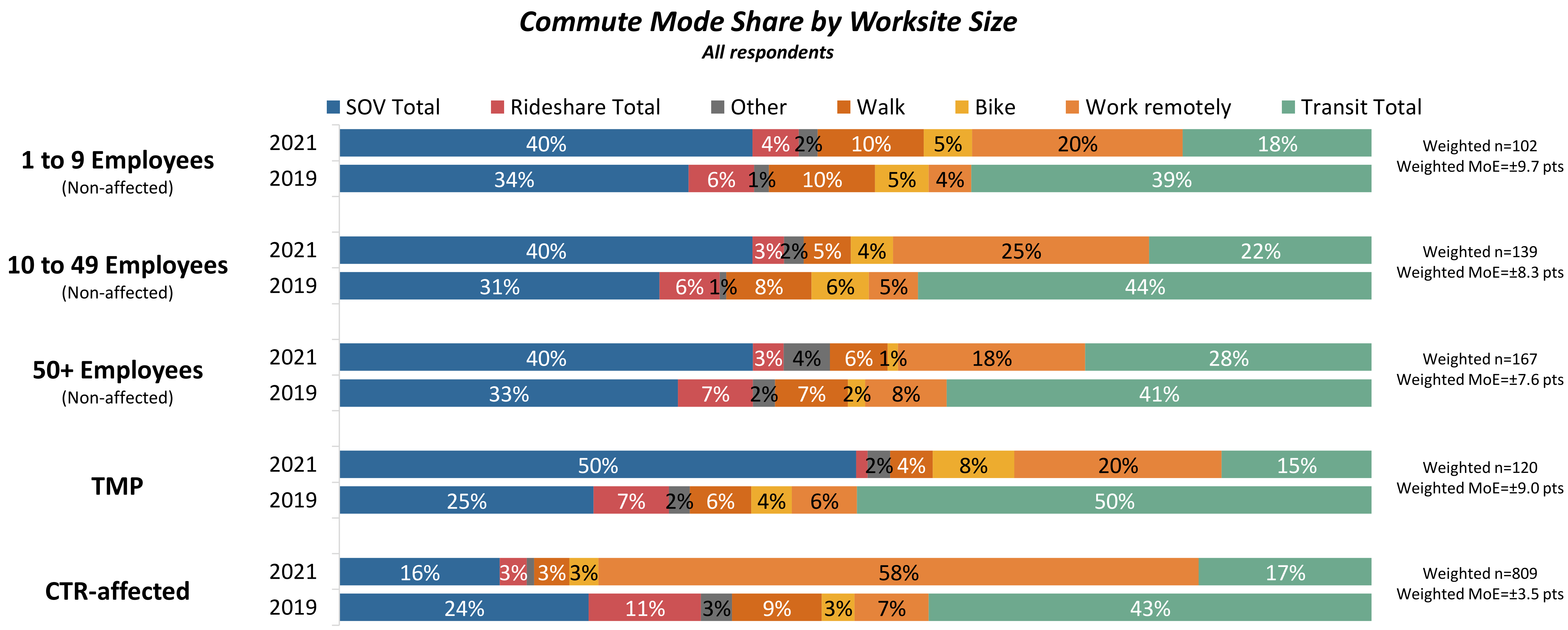


In previous iterations of the survey compressed workweek was combined with remote work

Q1. Currently, during a typical week, how do you get to work each day?

Mode Share by Worksite Size 2021 & 2019

SOV share increased the most among commuters to larger worksites that employees 50 or more employees.

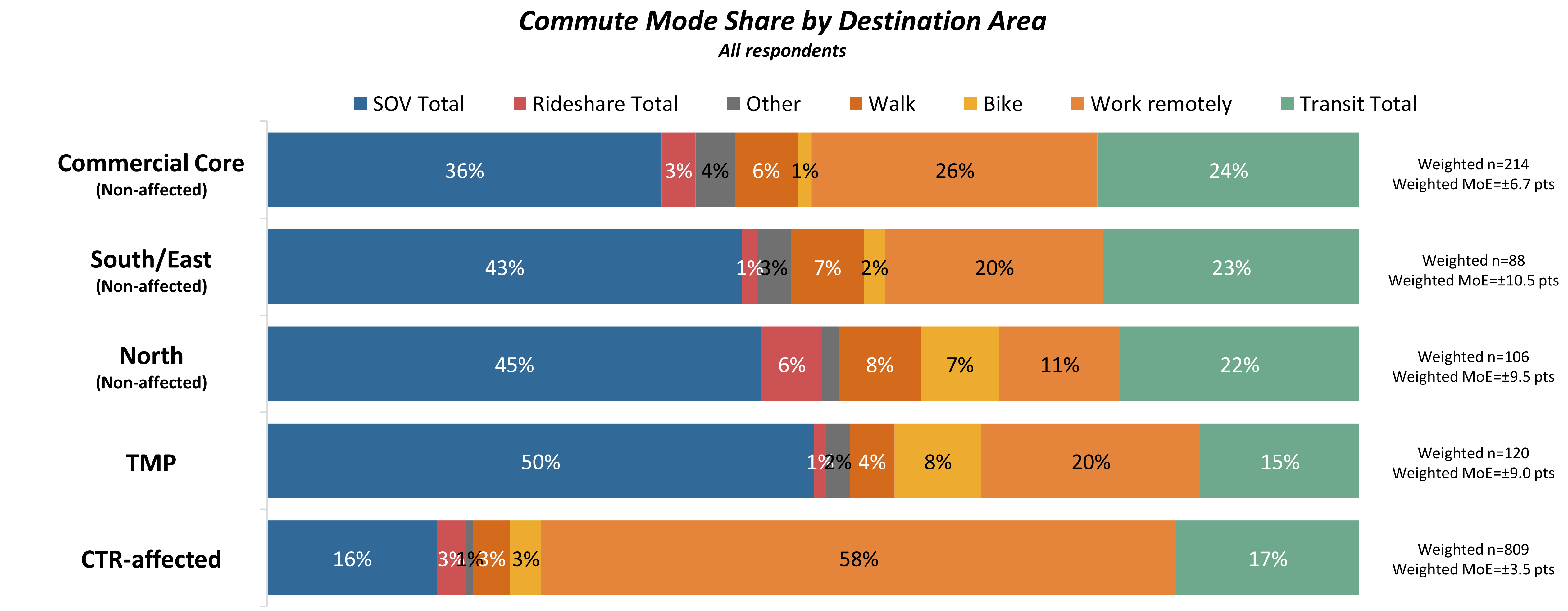


**In previous iterations of the survey compressed workweek was combined with remote work*

Q1. Currently, during a typical week, how do you get to work each day?

Commute Mode Share by Destination/Category

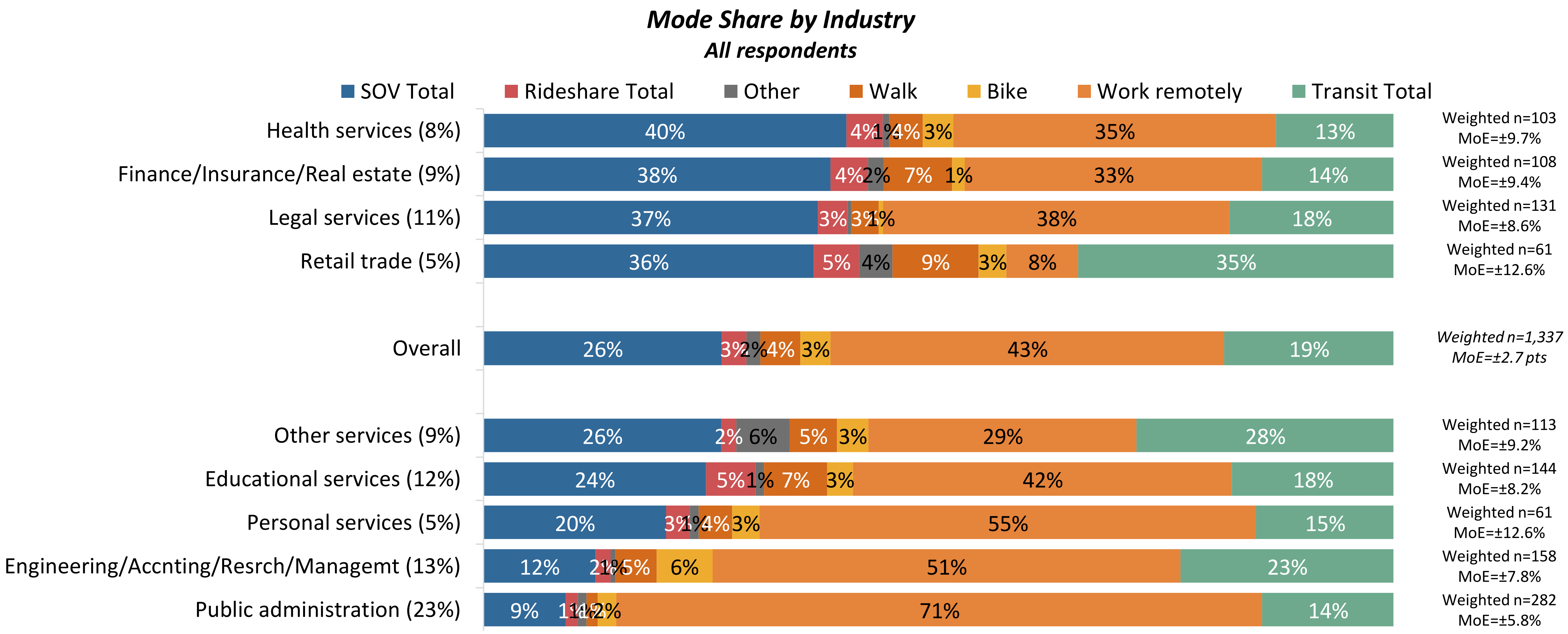
Transit usage rates are similar across destination areas among non-TMP and non-CTR-affected employees.



Q1. Currently, during a typical week, how do you get to work each day?

Mode Share by Industry

Retail employees work remote at lower rates and use public transit at higher rates than other employees. Remote work is the most common among public administration employees.

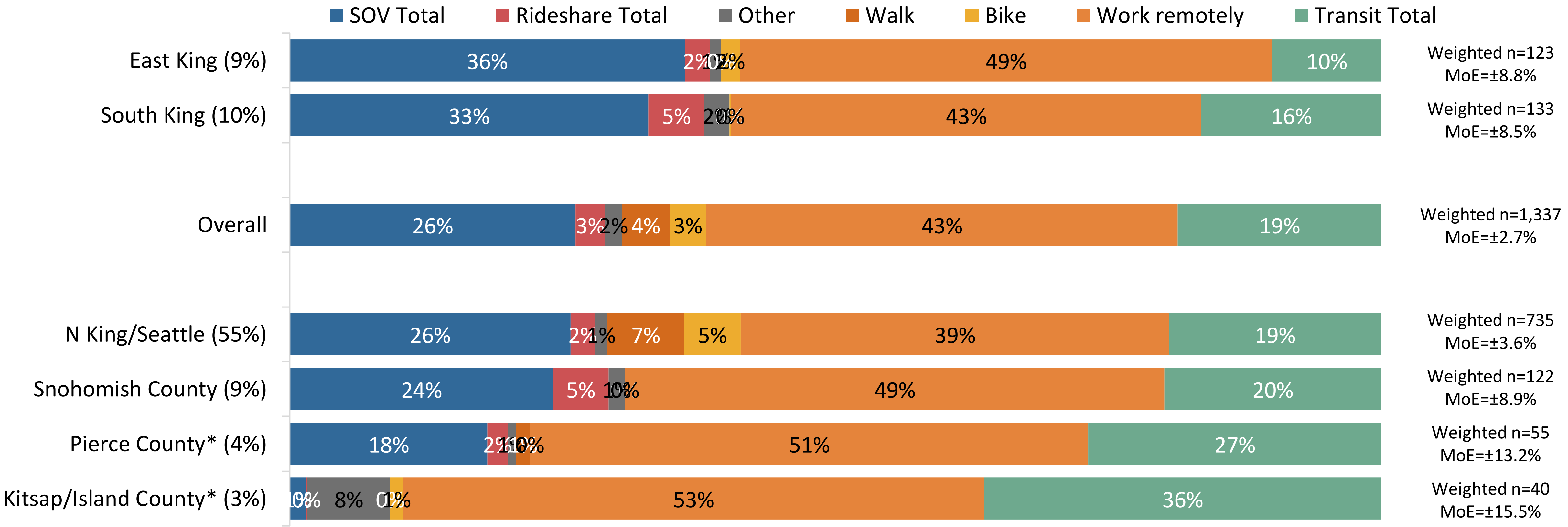


Q1. Currently, during a typical week, how do you get to work each day?

Mode Share by Commute Origin

Those who commute to Downtown from East and South King County are more likely to use SOV than those who commute from within the City of Seattle.

Mode Share by Commute Origin
All respondents



** The small sample sizes compute for a higher margin of error for these geographies.*

Q1. Currently, during a typical week, how do you get to work each day?

Multi-modal Commuter Segmentation

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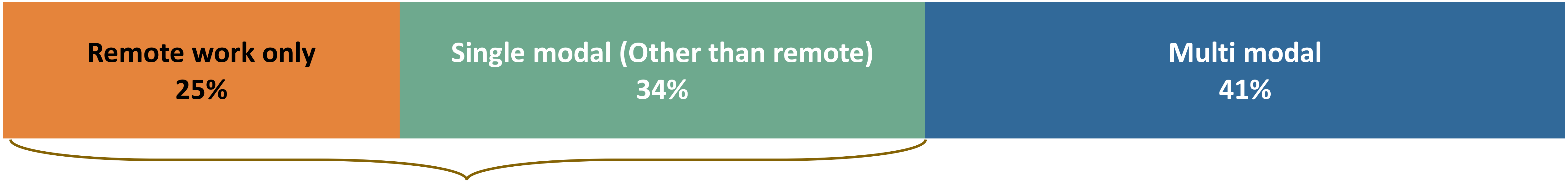
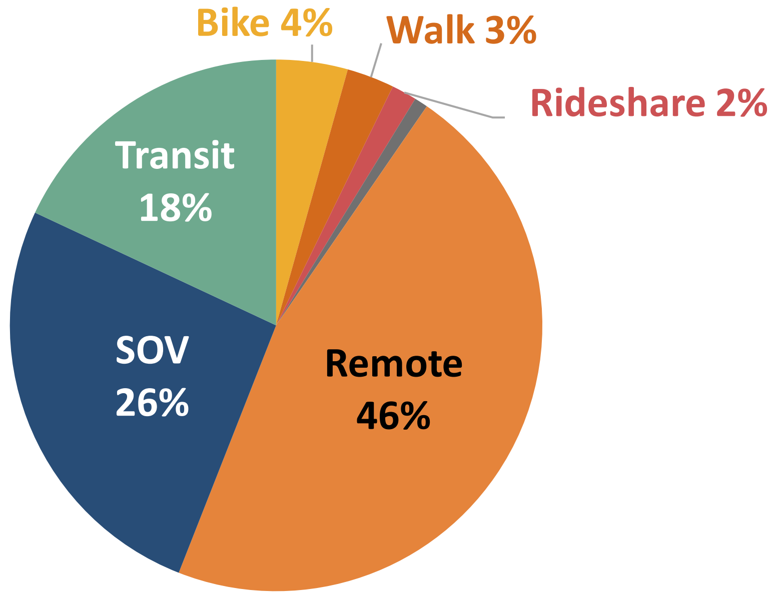
4-in-10 commuters alternate between multiple commute modes throughout the week, and a majority of those multi-modal commuters mix remote work with other modes.

All respondents



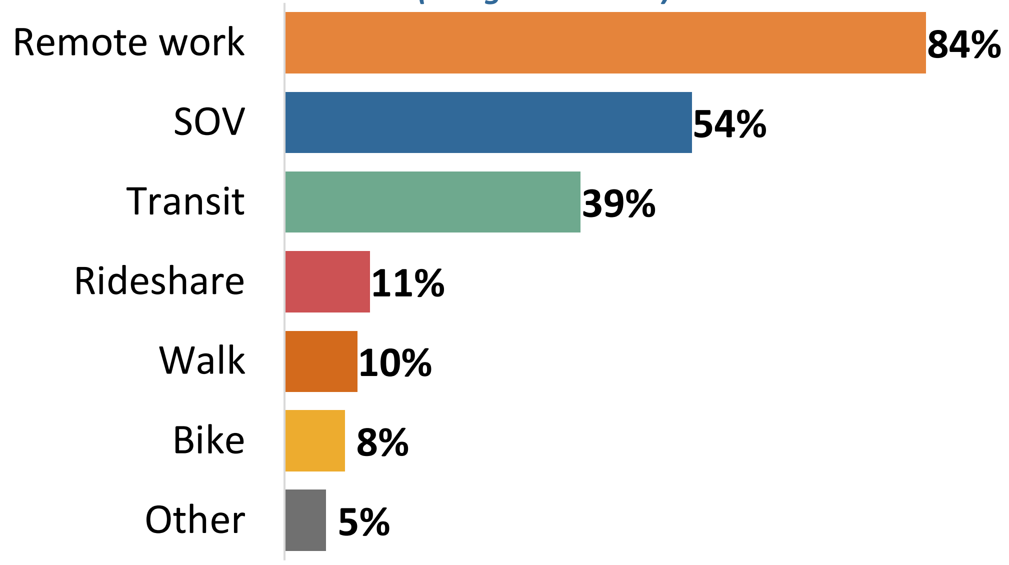
Single-Modal Commuters (Including remote, 59%)

Modes used by single-modal commuters (Weighted n=789)



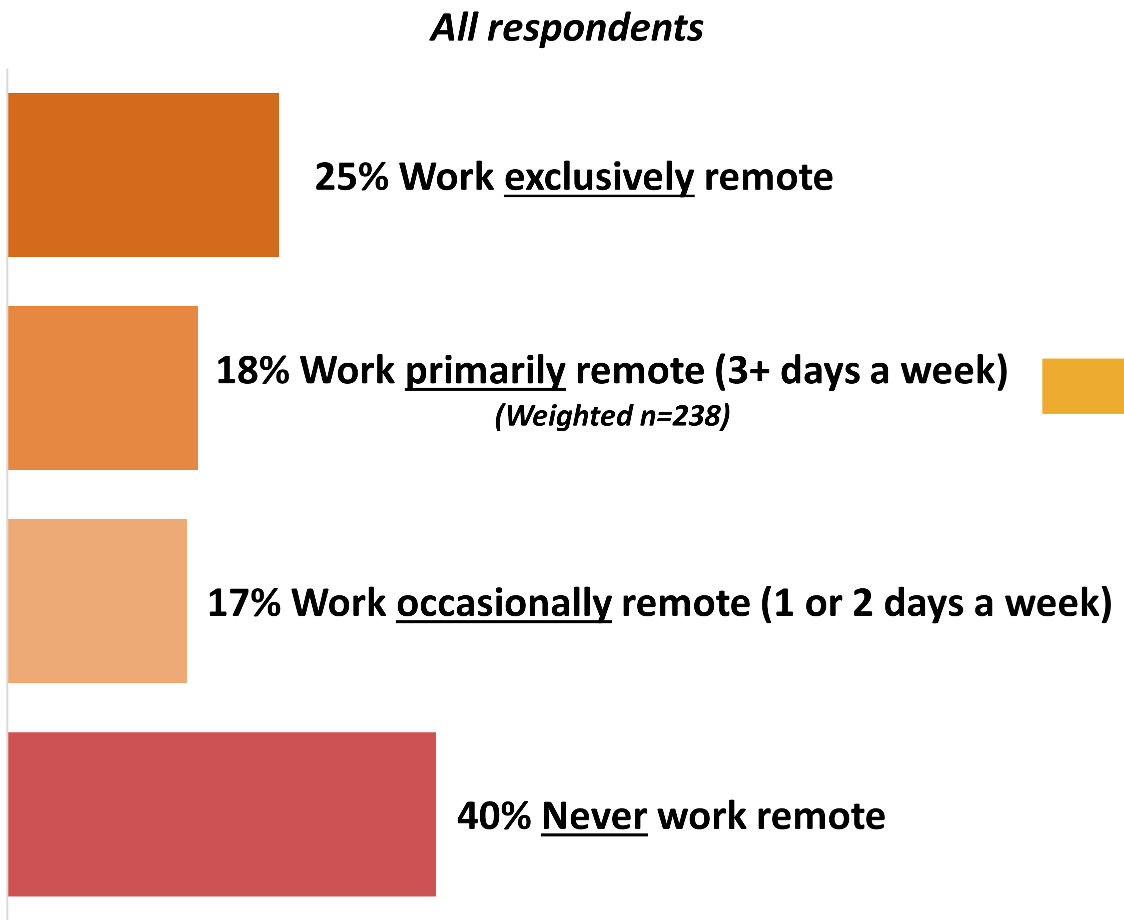
Multi-Modal Commuters

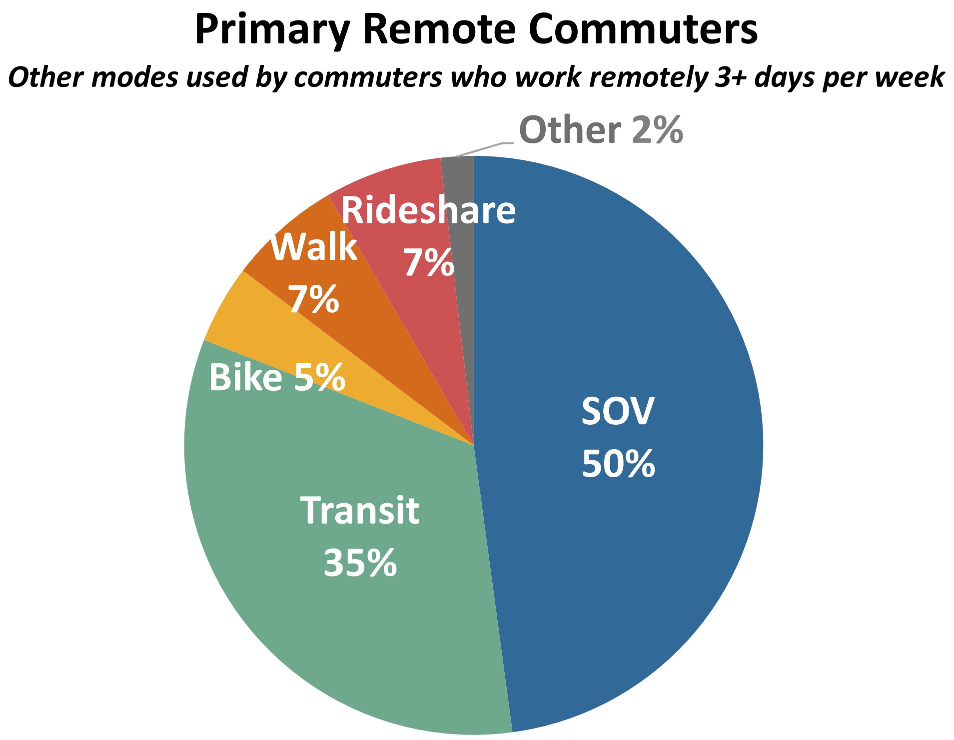
Modes used by multi-modal commuters at least once a week (Weighted n=548)



Remote Commuters

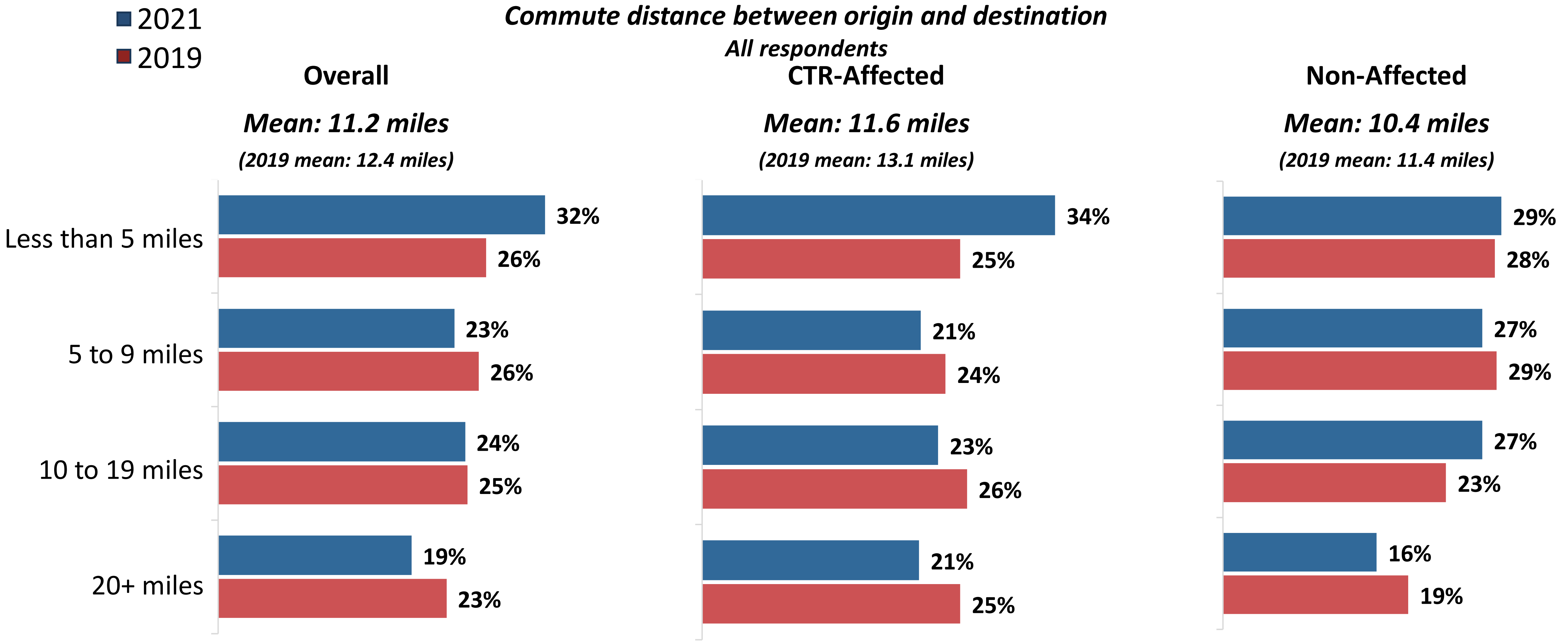
One quarter of Downtown commuters are working exclusively remote, and another 1-in-5 do so 3 or more days a week. Among those primarily remote commuters, half drive alone to work on the days that they take physical trips, and one third take transit.





Commute Distance by Worksite Type

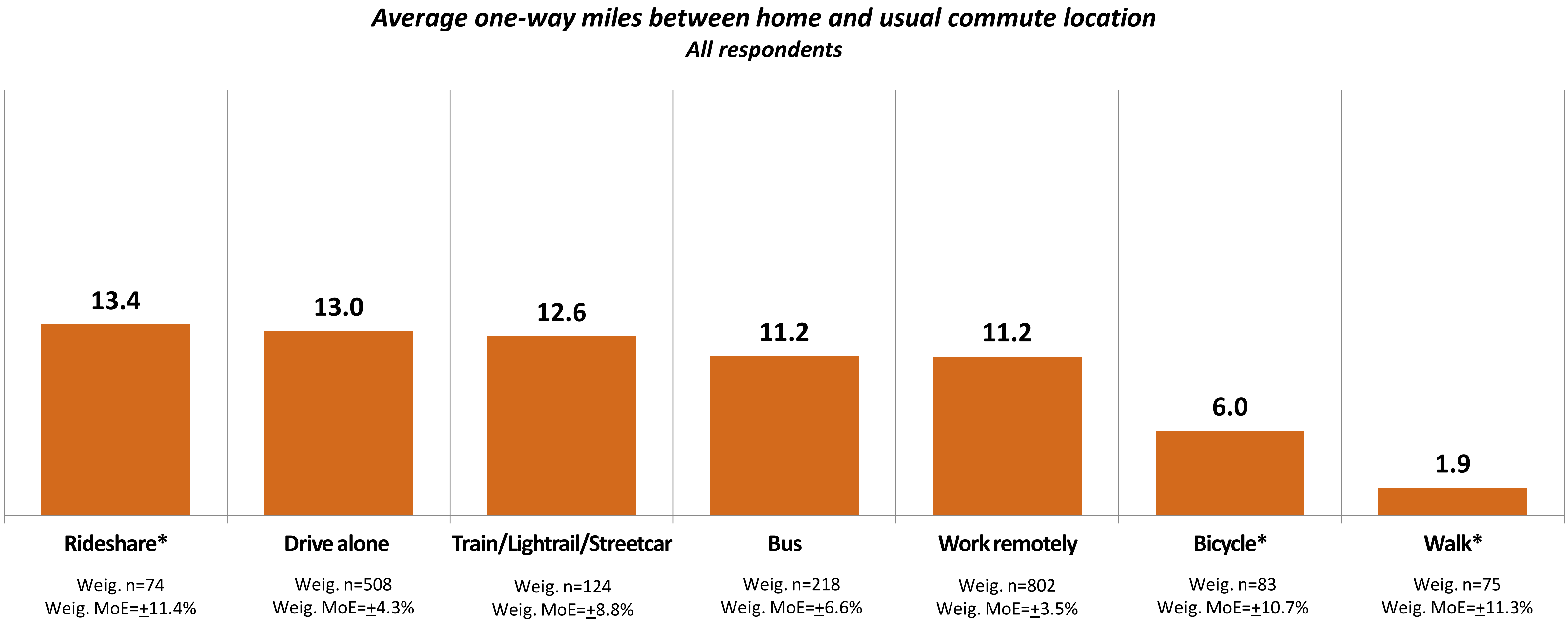
Reported commute distance remained by and large consistent since 2019 across worksite types, with reported commutes being slightly shorter, especially among CTR-effected employees.



Q2. Thinking about your one-way commute from home to your usual work location, including miles for errands or stops made on the way to work, how many miles do you commute?

Average Miles by Commute Mode

Those who commute by SOV report similar commute distances to those who use transit.



** The small sample sizes compute for a higher margin of error for these subgroups.*

Q2. Thinking about your one-way commute from home to your usual work location, including miles for errands or stops made on the way to work, how many miles do you commute?

2010–2021 Mode Share Trends Weekday Peak Commute Trips

The following results reflect the 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. Those who did not start work between 6 a.m. and 9 a.m. on a weekday have been omitted.

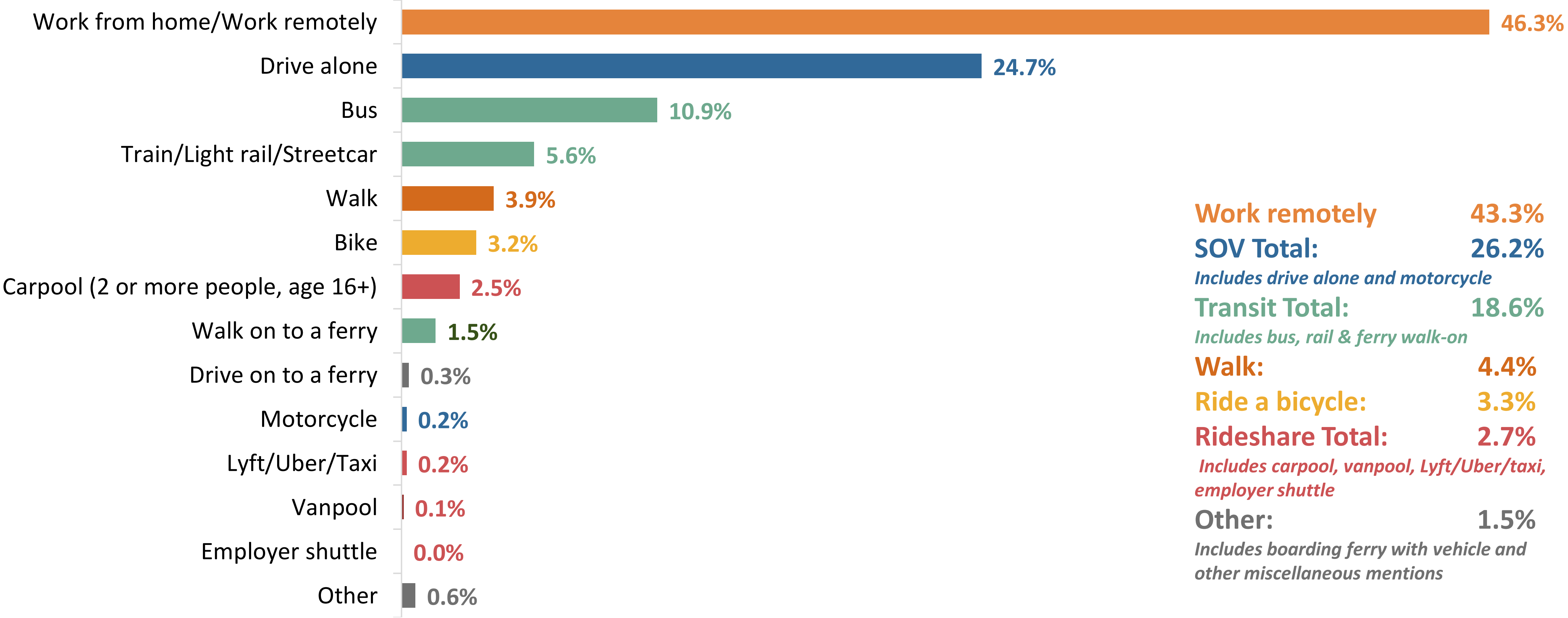
** **Note**: the 2021 survey captured respondents' <u>typical</u> commute modes used each day, compared to 2019 and earlier, which captured the modes used each day of the preceding week from when respondents completed the survey. These differences should be noted for multi-year trend comparisons.*

Weekday Peak Mode Share – 2021 Overall

Remote work accounts for close to one half (46.3%) of weekday peak-period commute trips to Downtown worksites.

2021 Detailed Mode Share of Weekday Peak Commute Trips
Respondents who started work between 6 a.m. and 9 a.m. on weekdays

Weighted n=1,155
Weighted MoE=±2.9 pts



Work remotely	**43.3%**
SOV Total:	**26.2%**
Includes drive alone and motorcycle	
Transit Total:	**18.6%**
Includes bus, rail & ferry walk-on	
Walk:	**4.4%**
Ride a bicycle:	**3.3%**
Rideshare Total:	**2.7%**
Includes carpool, vanpool, Lyft/Uber/taxi, employer shuttle	
Other:	1.5%
Includes boarding ferry with vehicle and other miscellaneous mentions	

Q1. Currently, during a typical week, how do you get to work each day?

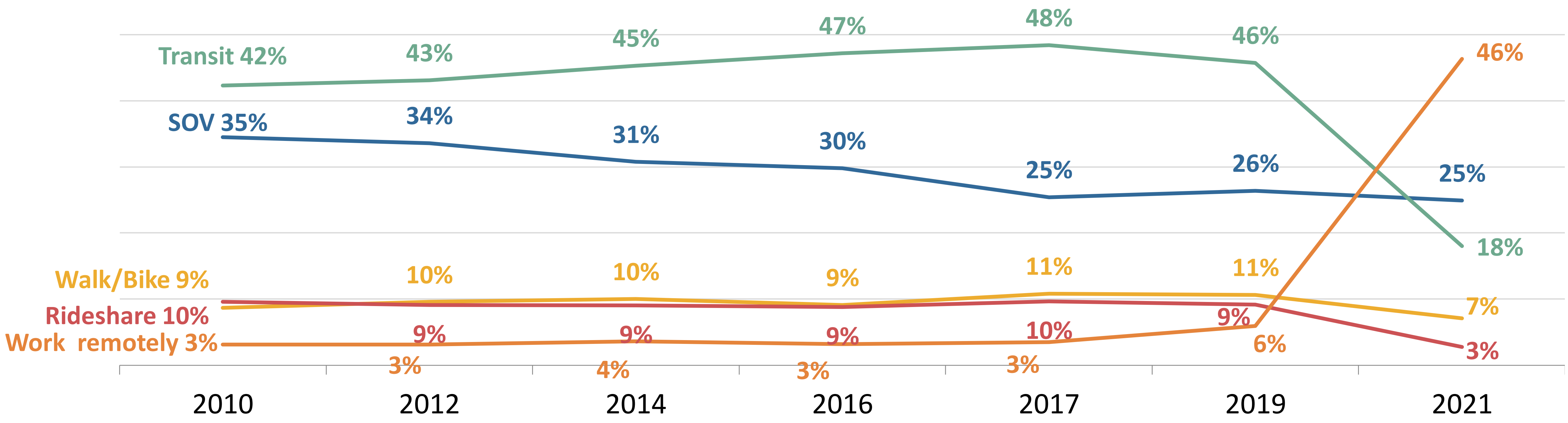
Weekday Peak Mode Share – Trend

As the overall share of telecommutes soared, the reported share of transit trips took the severest hit (18% in 2021 down from 46% in 2019), while the reported share of SOV (single-occupancy vehicle) usage remained by and large unchanged.

2010 – 2021 Weekday Peak Commute Mode Share Trend

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

Weighted n=1,155
Weighted MoE=±2.9 pts



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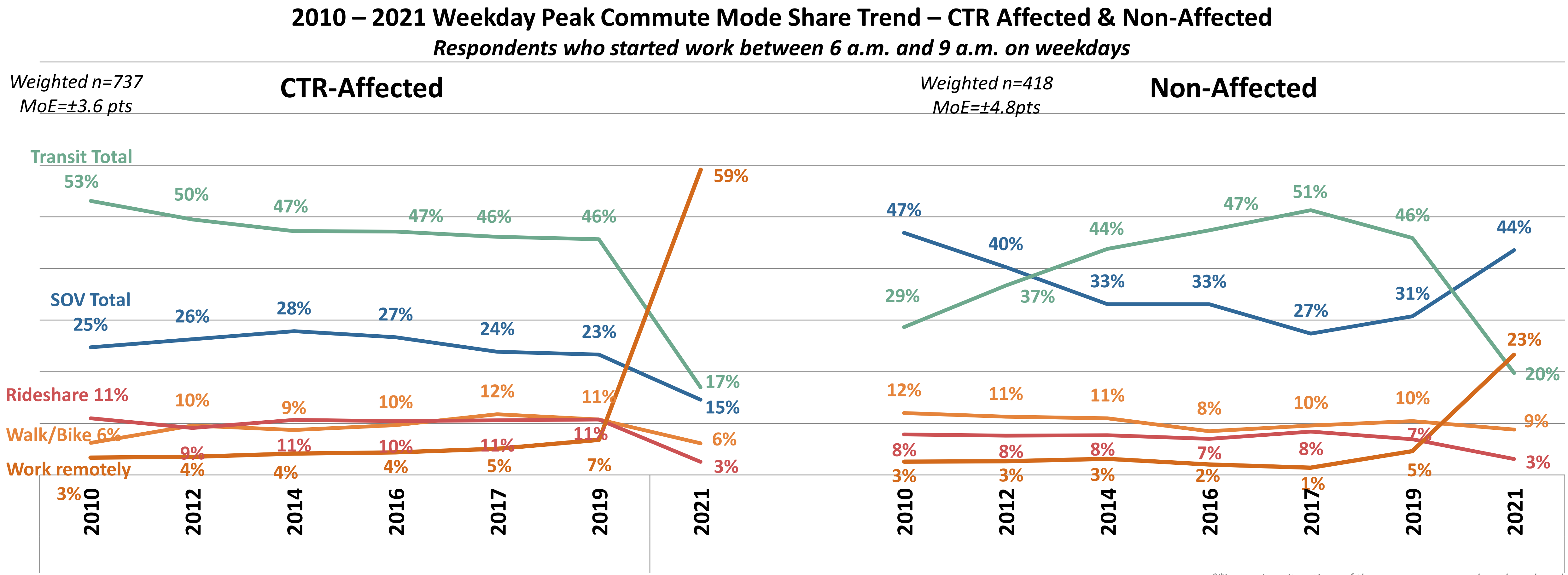
**In previous iterations of the survey compressed workweek and remote work were reported as a combined category

Q1. Currently, during a typical week, how do you get to work each day?

Weekday Peak Mode Share – Trend by Worksite Type

The shift from all other modes to remote work is apparent among CTR-affected commuters. Among non-affected commuters, the share of both remote work and SOV usage increased. The share of public transit trips is comparable between the two commuter groups.



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Q1. Currently, during a typical week, how do you get to work each day?

Detailed Mode Share – Multi-Year Trend

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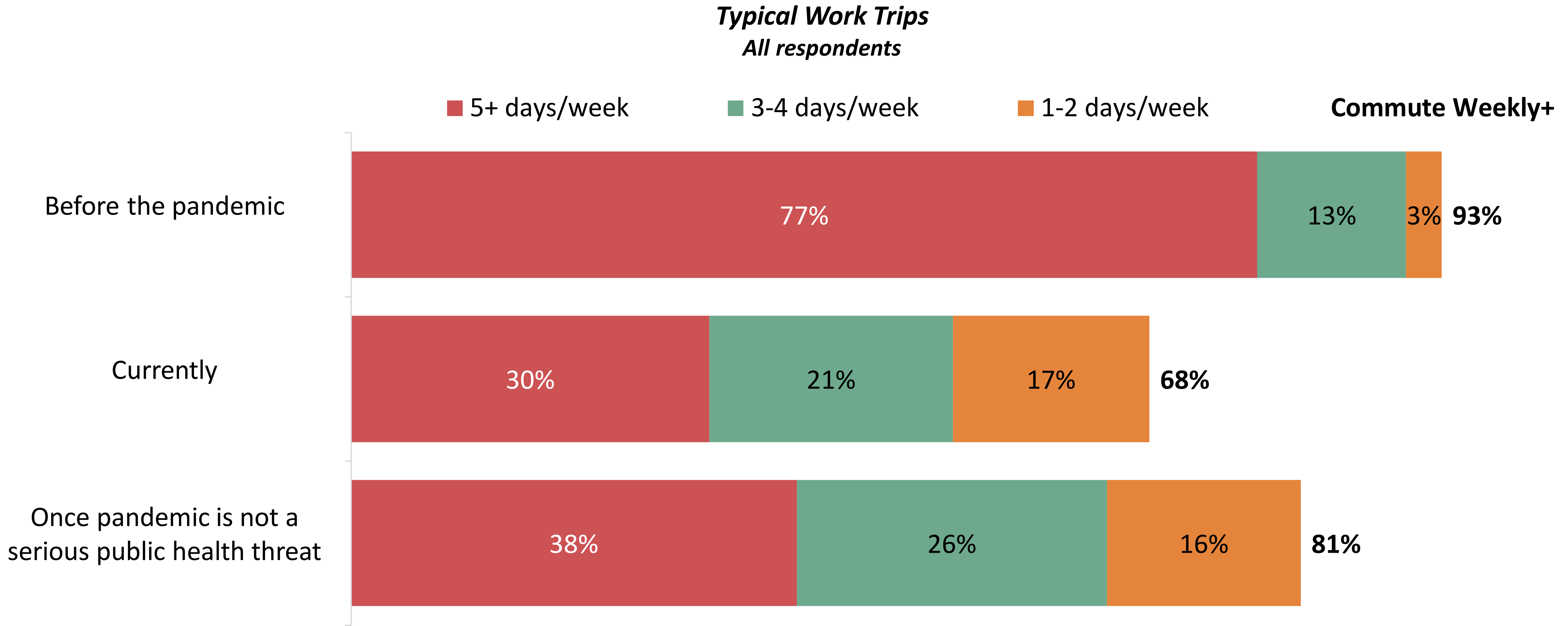
Weekday Peak Commute Mode Share – Weekday Trips by CTR-affected/Non-affected Respondents who started work between 6 a.m. and 9 a.m. on weekdays									
	Overall			CTR-affected			Non-affected (Including TMP)		
	2021	2019	*Overall Change from 2019*	2021	2019	*CTR-affected Change from 2019*	2021	2019	*Non-affected Change from 2019*
Weighted n	1,155	2,051		737	54,063		418	5,858	
Weighted Margin of Error (MoE)	±2.9%	±2.2%		±3.6%	±0.4%		±4.8%	±1.3%	
Work remotely	46.3%	5.7%	*+40.6 pts*	59.2%	6.6%	*+52.6 pts*	23.2%	4.5%	*+18.7 pts*
SOV Total	24.9%	26.4%	*-1.5 pts*	14.6%	23.3%	*-8.7 pts*	43.5%	30.7%	*+13.0 pts*
Transit Total	18.0%	45.8%	*-27.8 pts*	17.0%	45.7%	*-28.7 pts*	19.8%	45.9%	*-26.1 pts*
Rideshare Total	2.8%	9.2%	*-6.4 pts*	2.6%	10.7%	*-8.1 pts*	3.1%	7.0%	*-3.9 pts*
Work remotely	46.3%	5.7%	*+40.6%*	59.2%	6.6%	*+52.6%*	23.2%	4.5%	*+18.7%*
Drive alone	24.7%	25.9%	*-1.2%*	14.3%	22.7%	*-8.4%*	43.4%	30.4%	*+13.0%*
Bus	10.9%	34.9%	*-24.0%*	10.0%	34.7%	*-24.7%*	12.5%	35.1%	*-22.6%*
Train/Light rail/Streetcar	5.6%	8.5%	*-2.9%*	5.5%	8.9%	*-3.4%*	6.0%	8.0%	*-2.0%*
Walk	3.9%	7.3%	*-3.4%*	3.2%	7.6%	*-4.4%*	5.2%	6.8%	*-1.6%*
Bicycle	3.2%	3.4%	*-0.2%*	2.9%	3.1%	*-0.2%*	3.6%	3.7%	*-0.1%*
Carpool	2.5%	8.1%	*-5.6%*	2.2%	9.0%	*-6.8%*	2.9%	6.9%	*-4.0%*
Ferry as walk-on passenger	1.5%	2.4%	*-0.9%*	1.5%	2.1%	*-0.6%*	1.3%	2.8%	*-1.5%*
Other	0.6%	1.8%	*-1.2%*	0.3%	2.4%	*-2.1%*	1.2%	1.0%	*+0.2%*
Ferry with vehicle	0.3%	0.3%	*+/-0.0%*	0.3%	0.3%	*+/-0.0%*	0.4%	0.3%	*+0.1%*
Motorcycle/Moped	0.2%	0.5%	*-0.3%*	0.2%	0.6%	*-0.4%*	0.2%	0.4%	*-0.2%*
Vanpool	0.1%	1.1%	*-1.0%*	0.1%	1.8%	*-1.7%*	-	0.1%	*-0.1%*

Q1. Currently, during a typical week, how do you get to work each day?

Physical Commute Trips (All Respondents)

Typical Workweek Trips – Overall

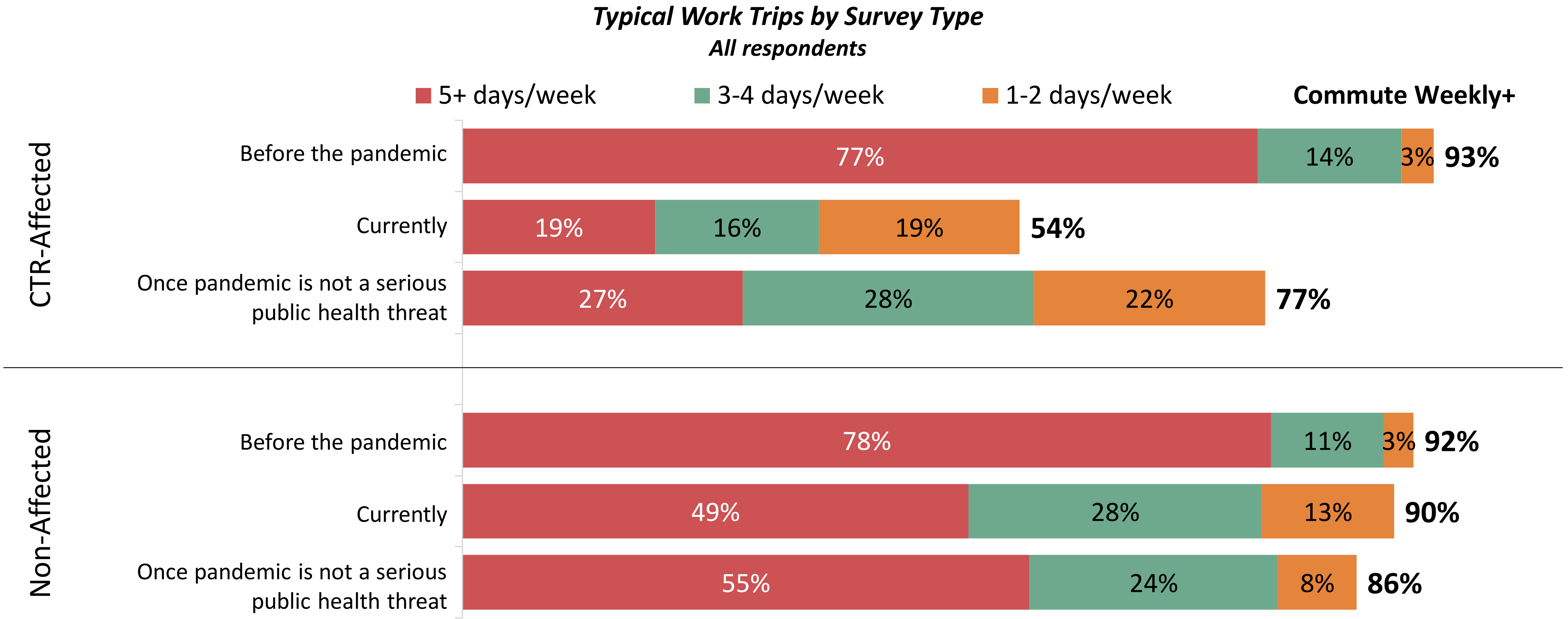
Pandemic has led to significant shifts in the number of days downtown employees physically commute to their workplace, and many expect these shifts to be somewhat permanent with only 35% anticipating going back to their physical office 5 days a week in the future, compared to 73% who did so before the COVID-19 pandemic.



Q5-7. During a typical workweek, about how many days would you make physical commute trips to your worksite…?

Typical Workweek Trips by Worksite Type

CTR-affected commuters report fewer physical trips to their worksites currently, and more CTR-affected commuters expect to continue doing so in the future. Commuters at non-affected businesses make at least once-weekly physical trips at the same level that they report doing before the pandemic, although a considerable portion expect to go to the physical work location less than 5 days a week in the future.

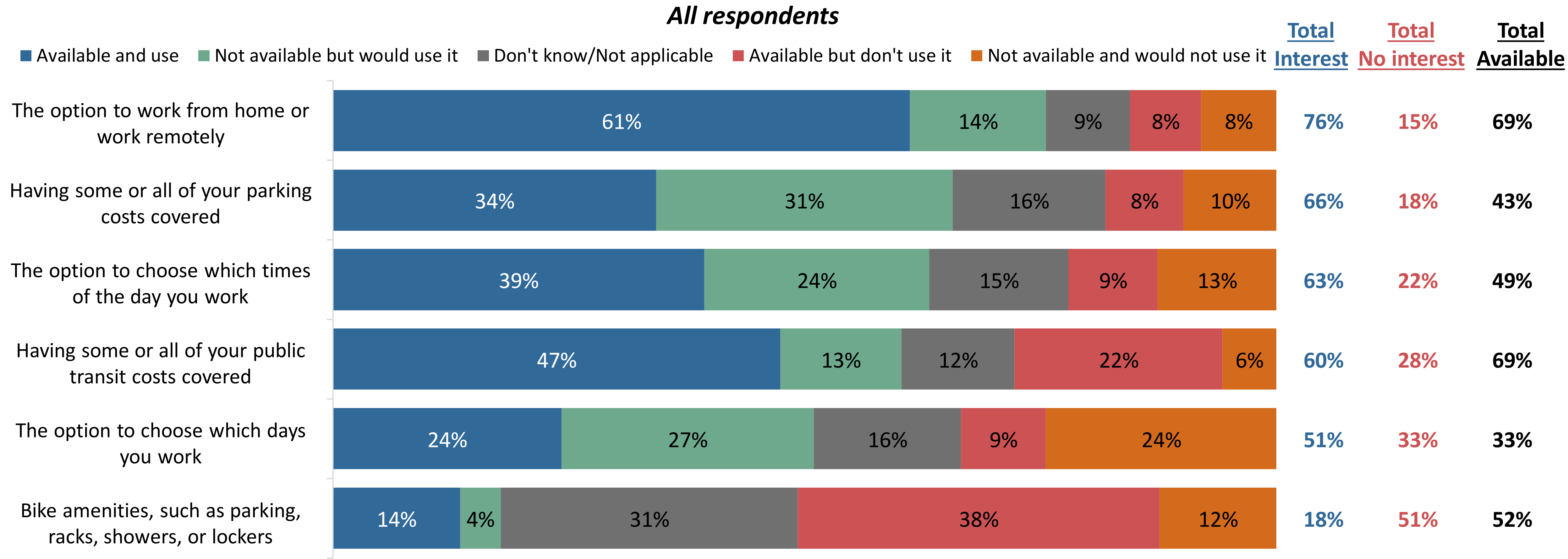


Q5-7. During a typical workweek, about how many days would you make physical commute trips to your worksite...?

Transit & Commuter Benefits (All Respondents)

Benefit Availability and Use – Overall

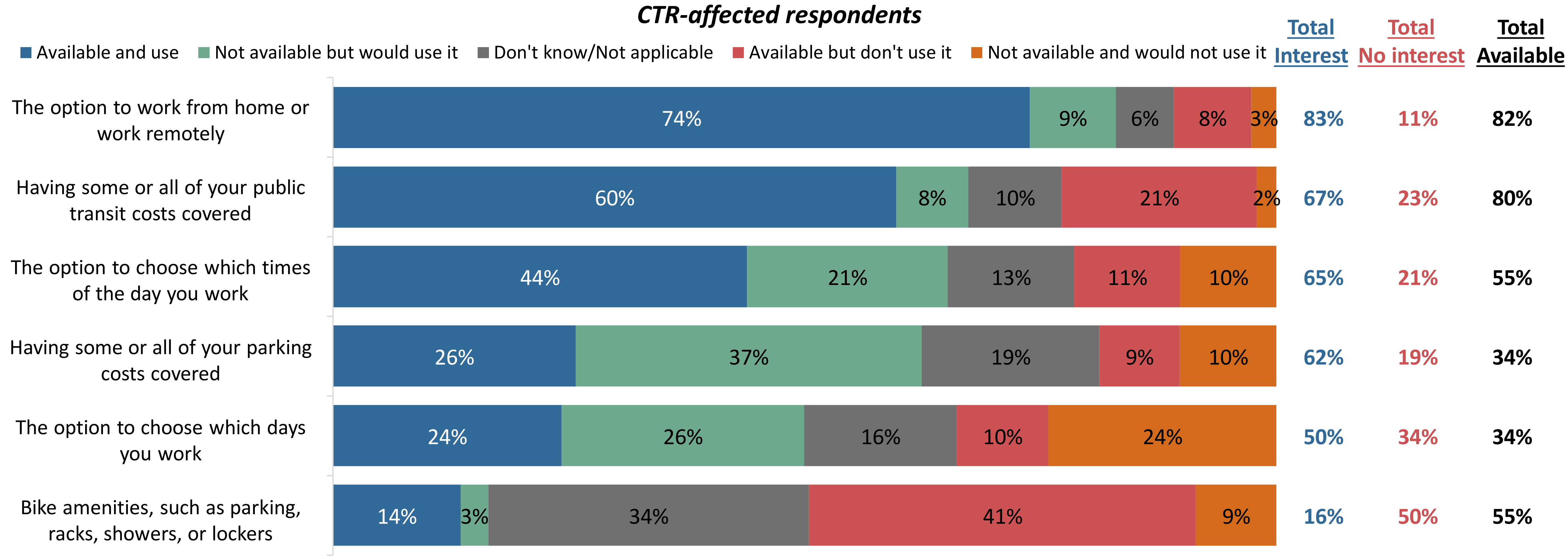
61% of Downtown Seattle commuters report using the remote work options currently available to them, and another 14% say they are unavailable but would be interested if in working remotely if offered. The largest unmet interest is in having parking costs covered (31% not available but would use), followed by flexible scheduling options (24-27%).



Q8-13. To the best of your knowledge, please indicate whether each of the following amenities and benefits are currently offered for your commute, and whether you use it or would use it if it were available for your commute.

Benefit Availability and Use – CTR-Affected

Remote work and transit cost coverage options are more accessible to, and are used more widely by, CTR-affected employees compared to overall. Interest among CTR-affected commuters is higher than availability for having parking costs covered and for the options to choose working days/times.



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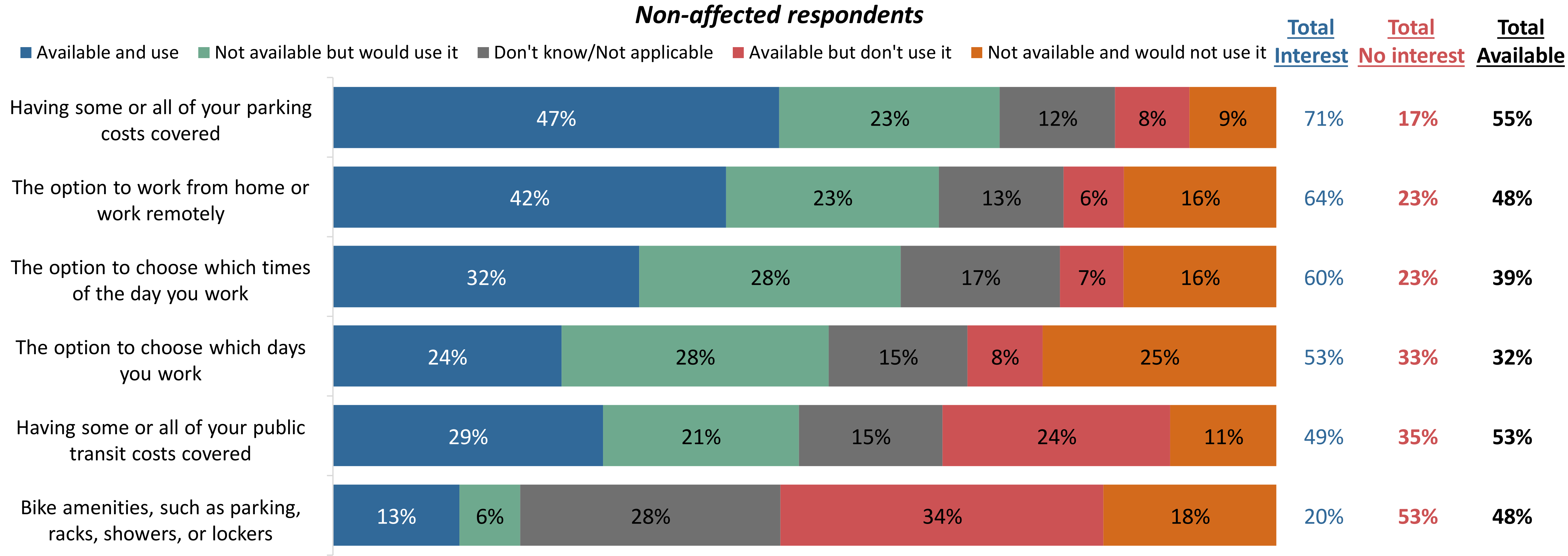
Benefit Availability and Use – Non-Affected

Employer-paid parking rises to the top in interest among non-CTR affected employees. There is higher unmet interest in remote work options and in the options to choose working days/times than in other benefits.



Q8-13. To the best of your knowledge, please indicate whether each of the following amenities and benefits are currently offered for your commute, and whether you use it or would use it if it were available for your commute.

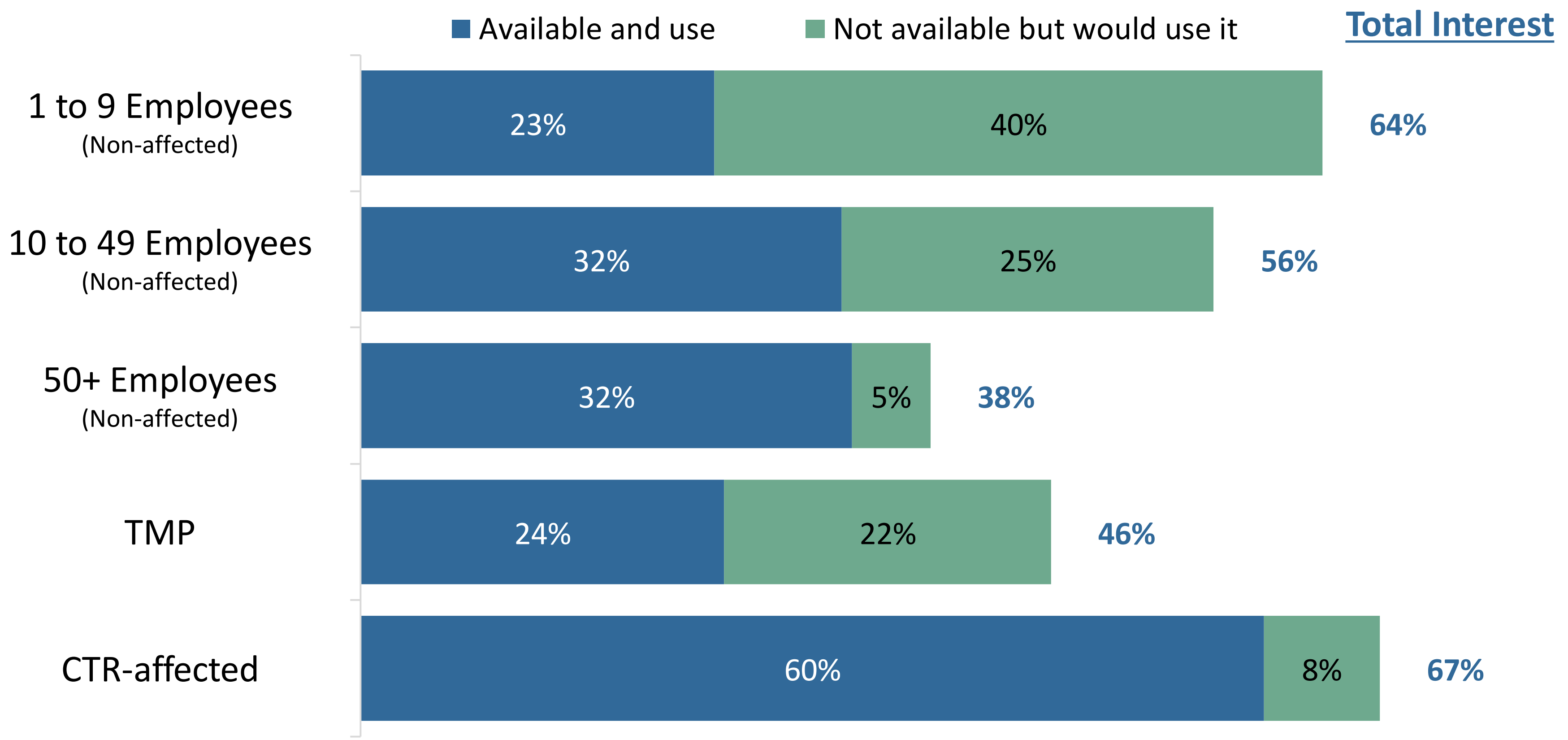
Transit Benefit Interest by Worksite Size/Category

EMC research

Unmet demand for employer-paid transit is higher among employees at smaller worksites than their counterparts in larger ones.

Having some or all of your public transit costs covered

All respondents

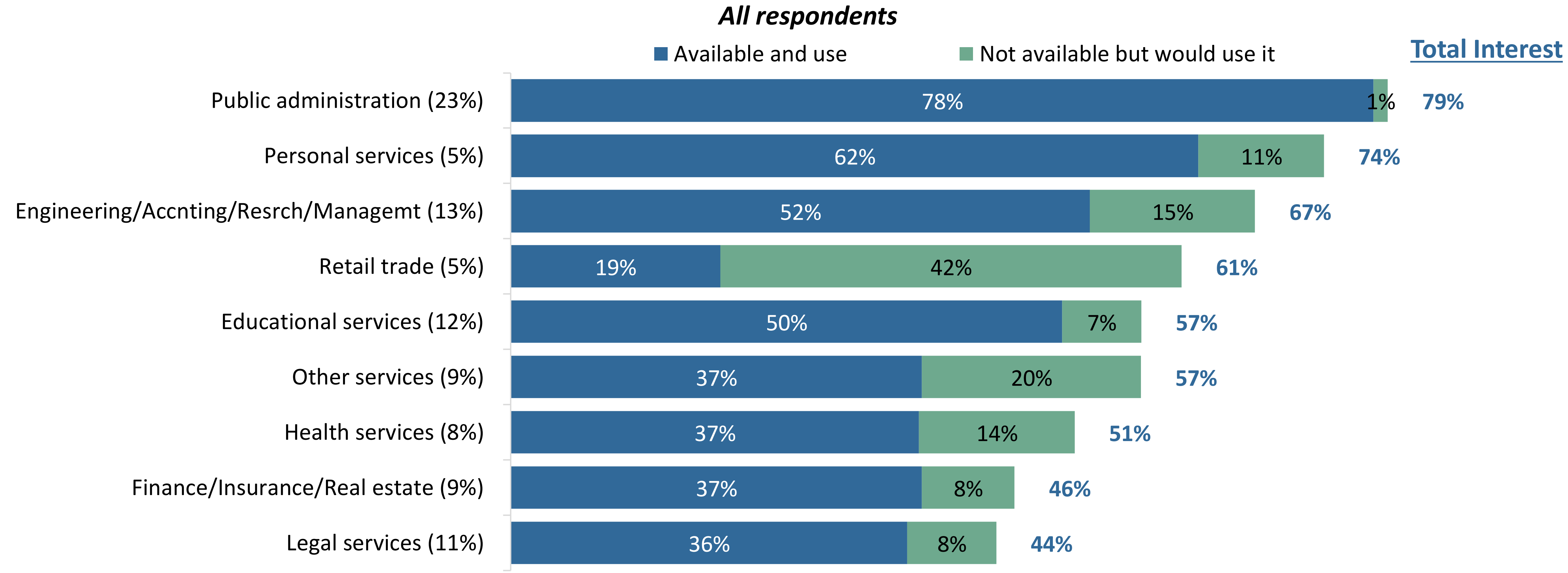


Q8-13. To the best of your knowledge, please indicate whether each of the following amenities and benefits are currently offered for your commute, and whether you use it or would use it if it were available for your commute.

Transit Benefit Interest by Industry

The largest unmet demand for having one's transit costs covered is among retail trade employees with 42% saying that this benefit is not available to them but they would use it at least occasionally if it were.

Having some or all of your public transit costs covered

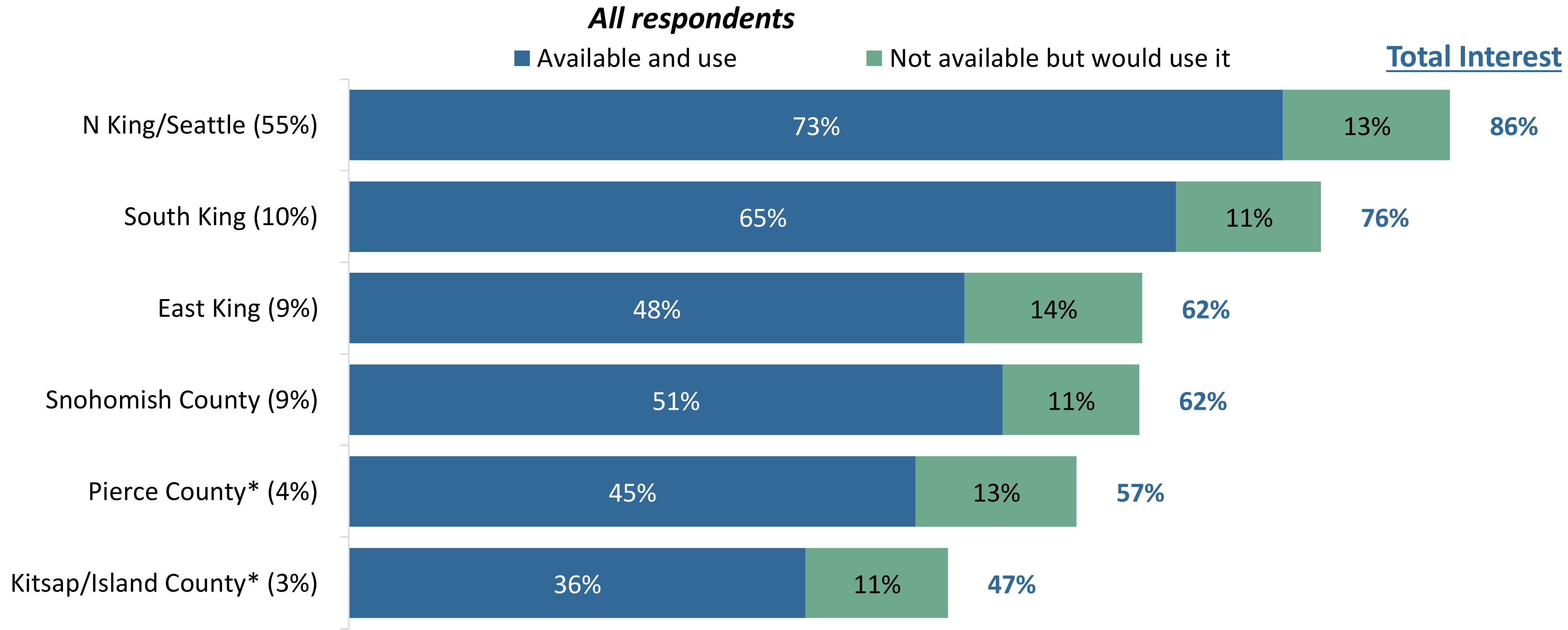


Q8-13. To the best of your knowledge, please indicate whether each of the following amenities and benefits are currently offered for your commute, and whether you use it or would use it if it were available for your commute.

Transit Benefit Interest by Commute Origin

Unmet demand for having one's public transit costs covered by the employer varies little by commute origin.

Having some or all of your public transit costs covered



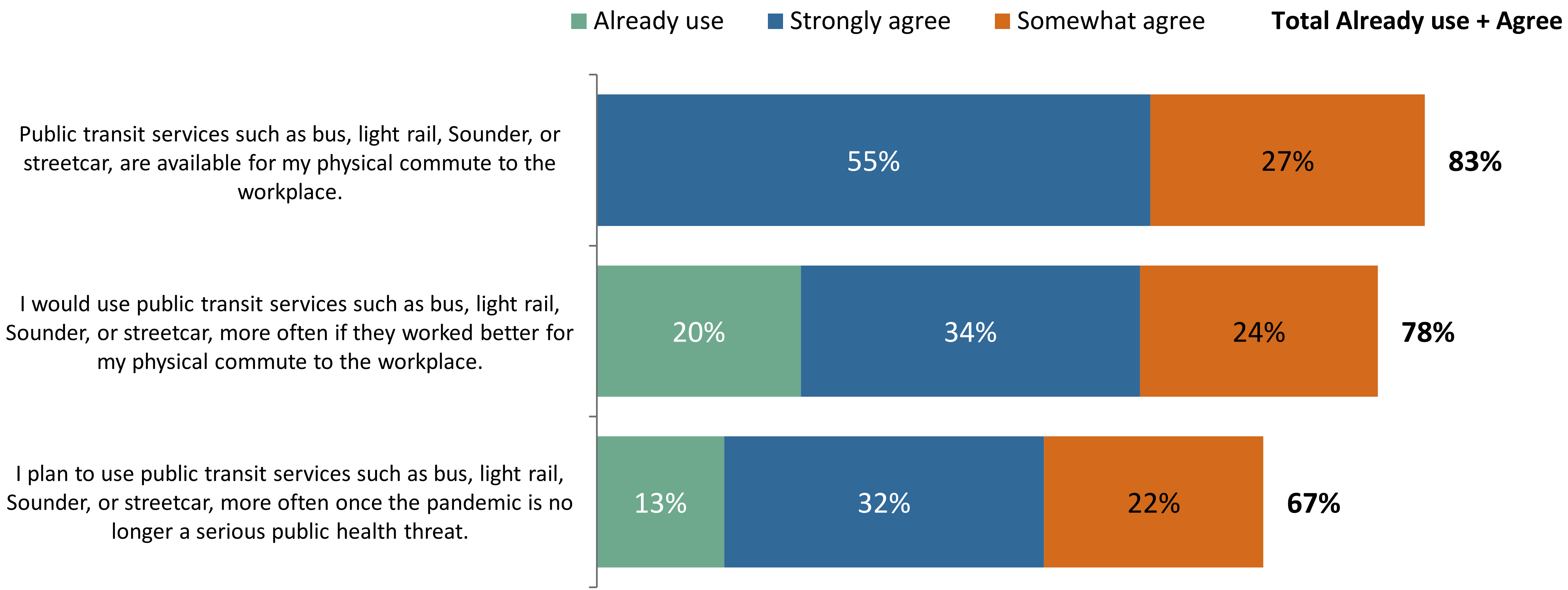
** The small sample sizes compute for a higher margin of error for these geographies.*

Q8-13. To the best of your knowledge, please indicate whether each of the following amenities and benefits are currently offered for your commute, and whether you use it or would use it if it were available for your commute.

Public Transit Attitudes (All Respondents)

Transit Attitudinal Statements - Overall

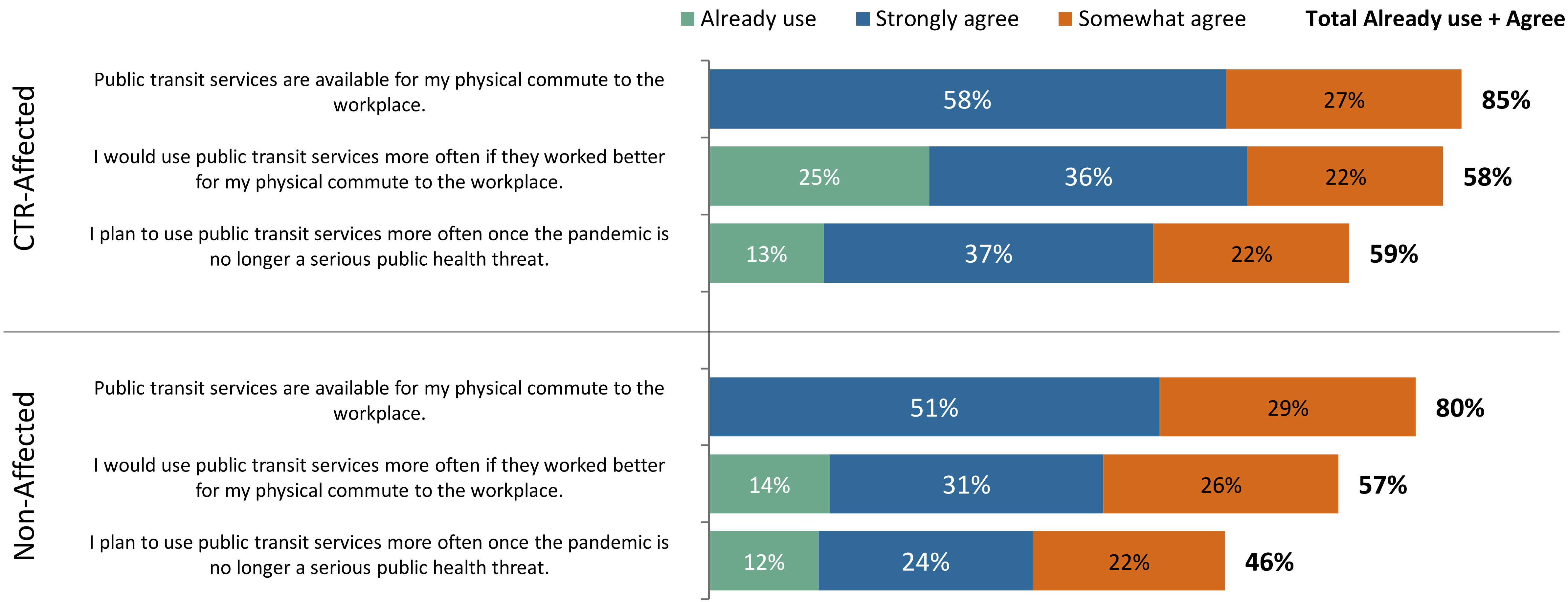
While most (83%) of Downtown commuters say public transit is available for their physical work commutes, 58% say they would use it more often if it worked better for them. A quarter disagree that they will be riding transit more often even after COVID-19 pandemic is no longer a serious public health threat.



Q14-16. Please indicate whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with each of the following statements.

Transit Attitudinal Statements by Worksite Type

Non-CTR affected employees express less interest in using public transit more often if it fit their schedules better or after the pandemic is over compared to employees at CTR worksites, but it is still a minority attitude even among those employees.

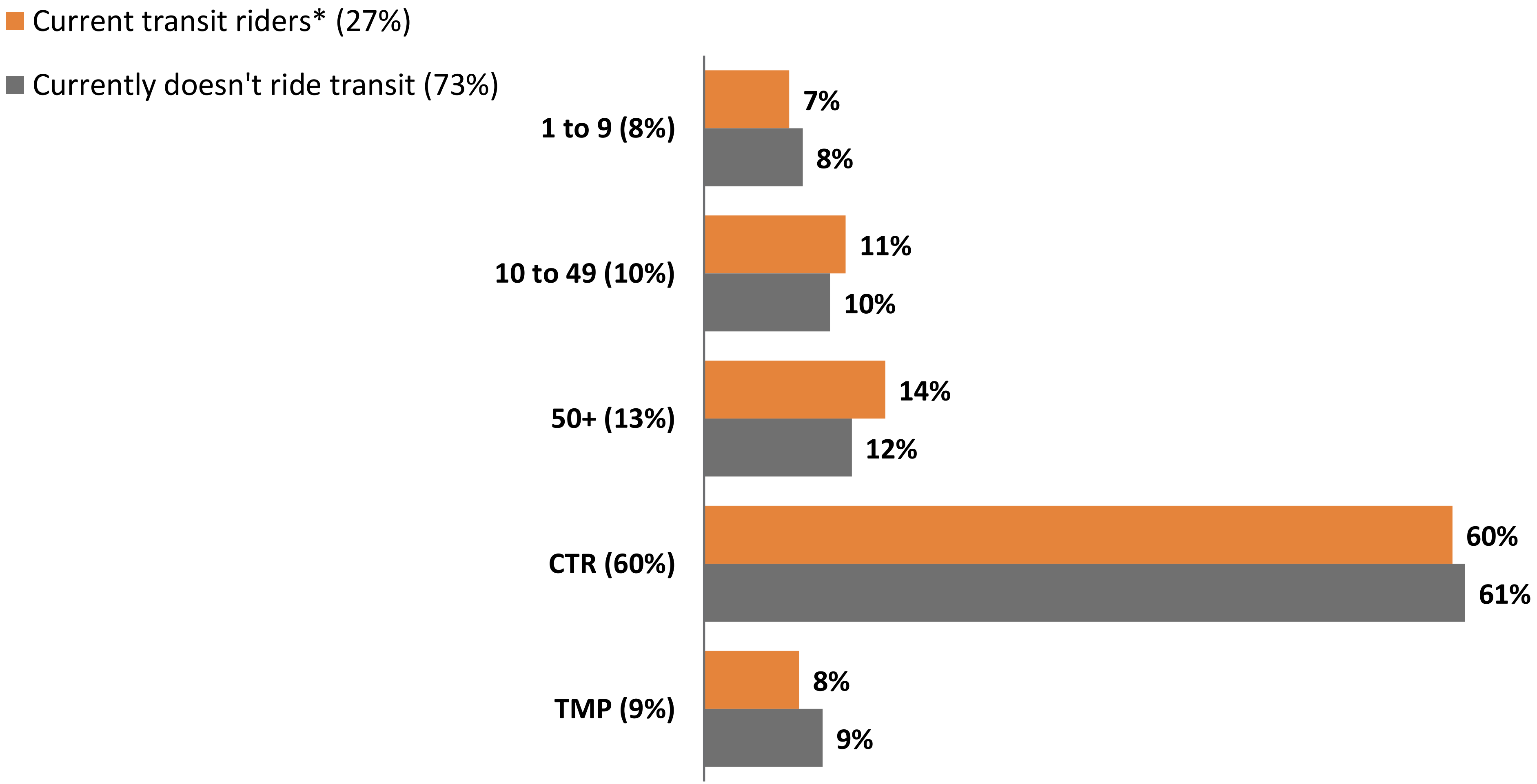


Q14-16. Please indicate whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with each of the following statements.

Profiles by Public Transit Ridership and Public Transit Attitudes (All Respondents)

Worksite Size by Current Transit Ridership

Current transit riders are distributed evenly across worksite size and types.



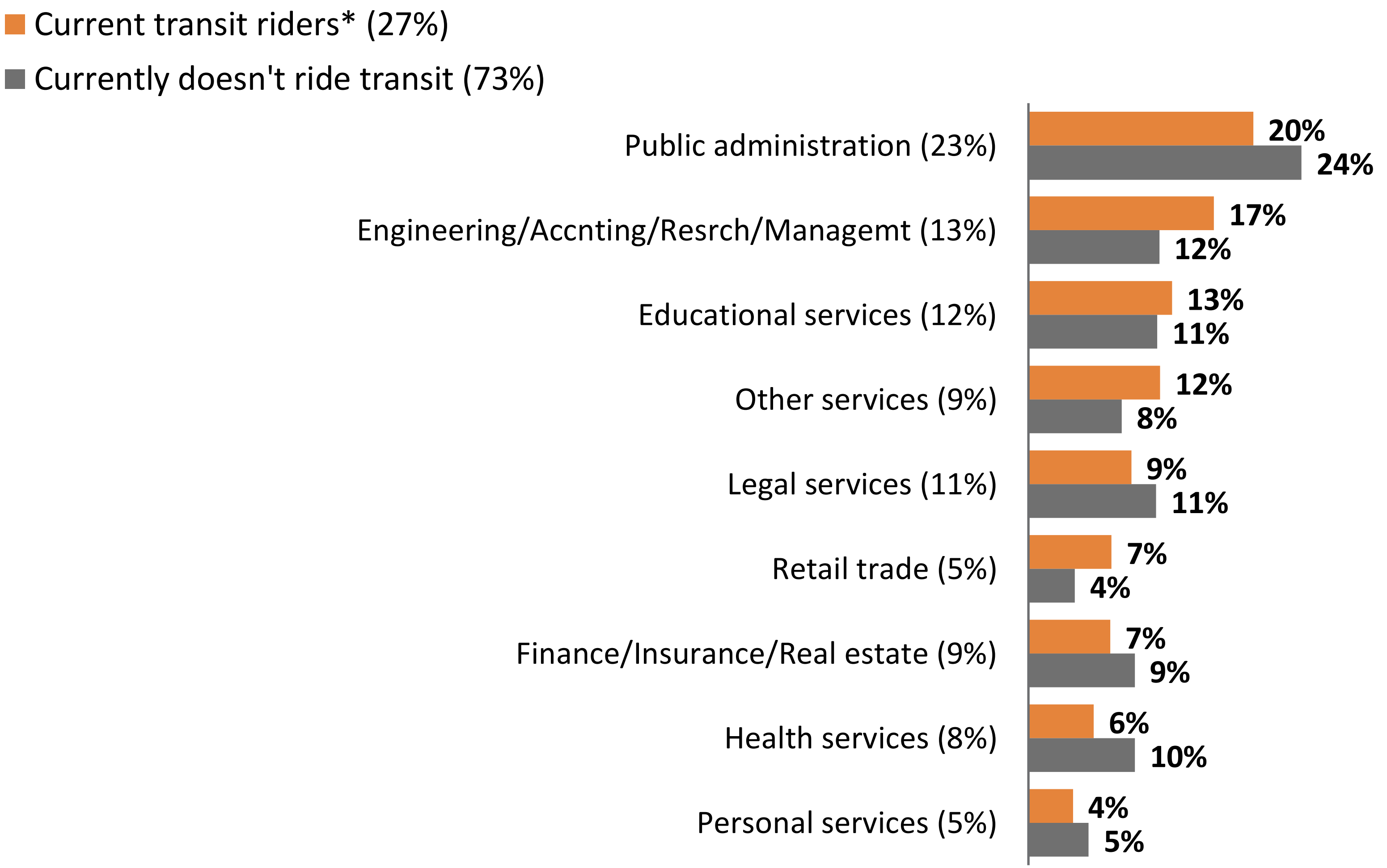
** Includes those who report currently riding transit at least weekly.*

Q1. Currently, during a typical week, how do you get to work each day?

Industry by Current Transit Ridership

EMC research

Engineering/accounting/research/management employees are more likely to be riding transit currently.

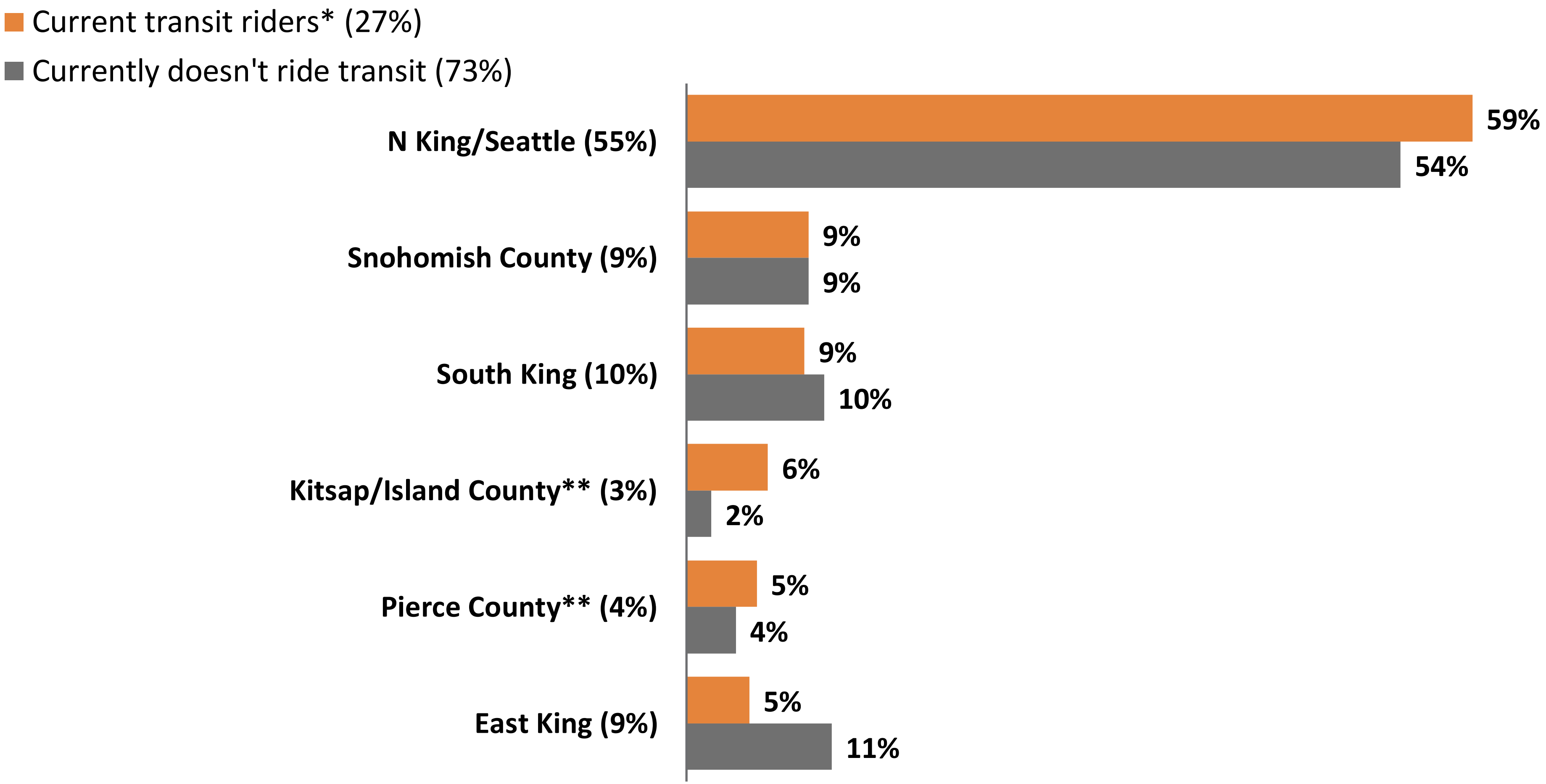


** Includes those who report currently riding transit at least weekly.*

Q1. Currently, during a typical week, how do you get to work each day?

Commute Trip Origin by Current Transit Ridership

Current transit riders are slightly overrepresented among those who commute from within the City of Seattle.



** Includes those who report currently riding transit at least weekly.*

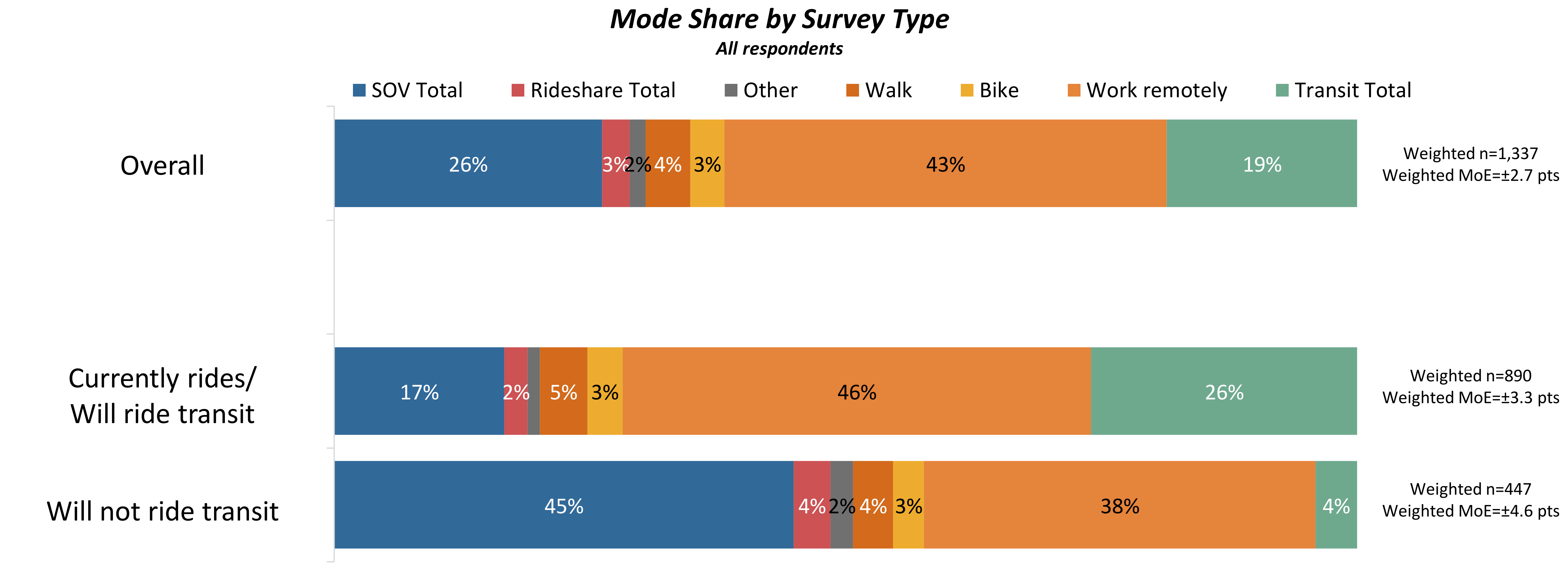
*** The small sample sizes compute for a higher margin of error for these geographies.*

Q1. Currently, during a typical week, how do you get to work each day?

Overall Weekday Mode Share by Transit Attitudes

EMC research

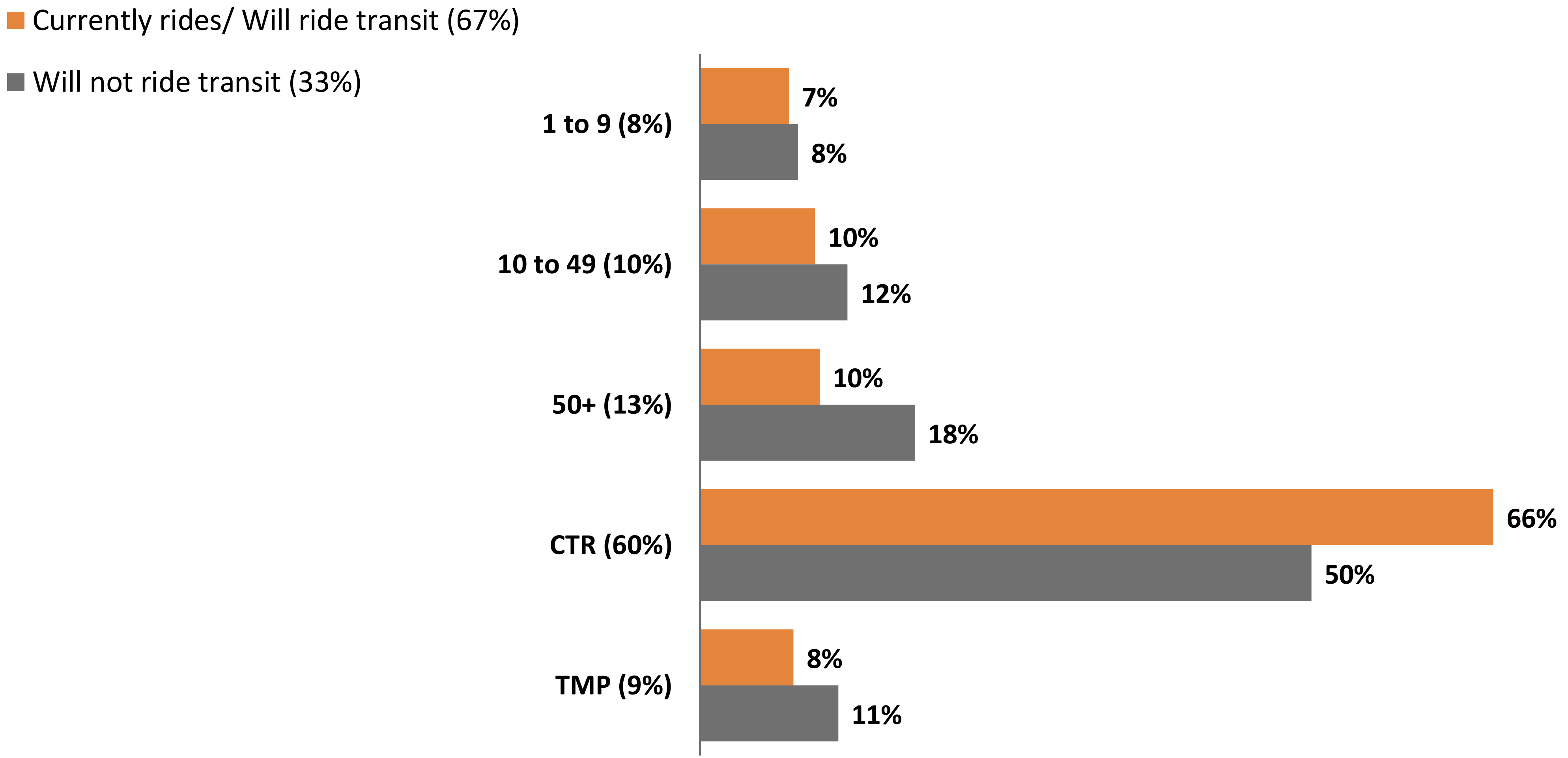
Those who disagree with the statement "I plan to use public transit services more often once the pandemic is no longer a serious public health threat" are more likely to be current SOV users than those who agree.



Q1. Currently, during a typical week, how do you get to work each day?

Worksite Size by Transit Attitudes

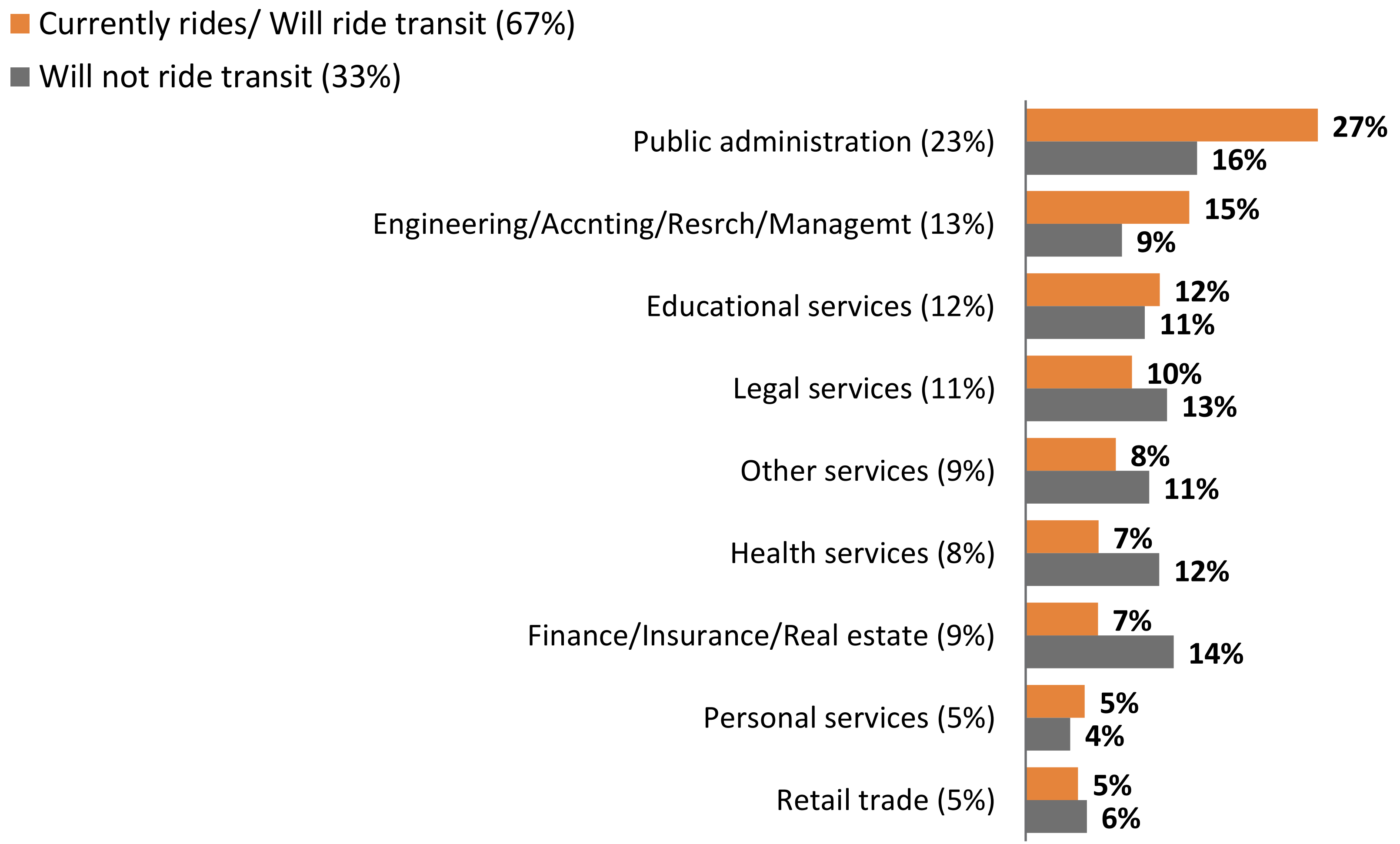
Those who are receptive to riding the transit for their commutes are overrepresented among CTR-affected employees, and those who aren't are overrepresented at larger non-affected worksites.



Q14-16. Please indicate whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with each of the following statement: I plan to use public transit services more often once the pandemic is no longer a serious public health threat.

Industry by Transit Attitudes

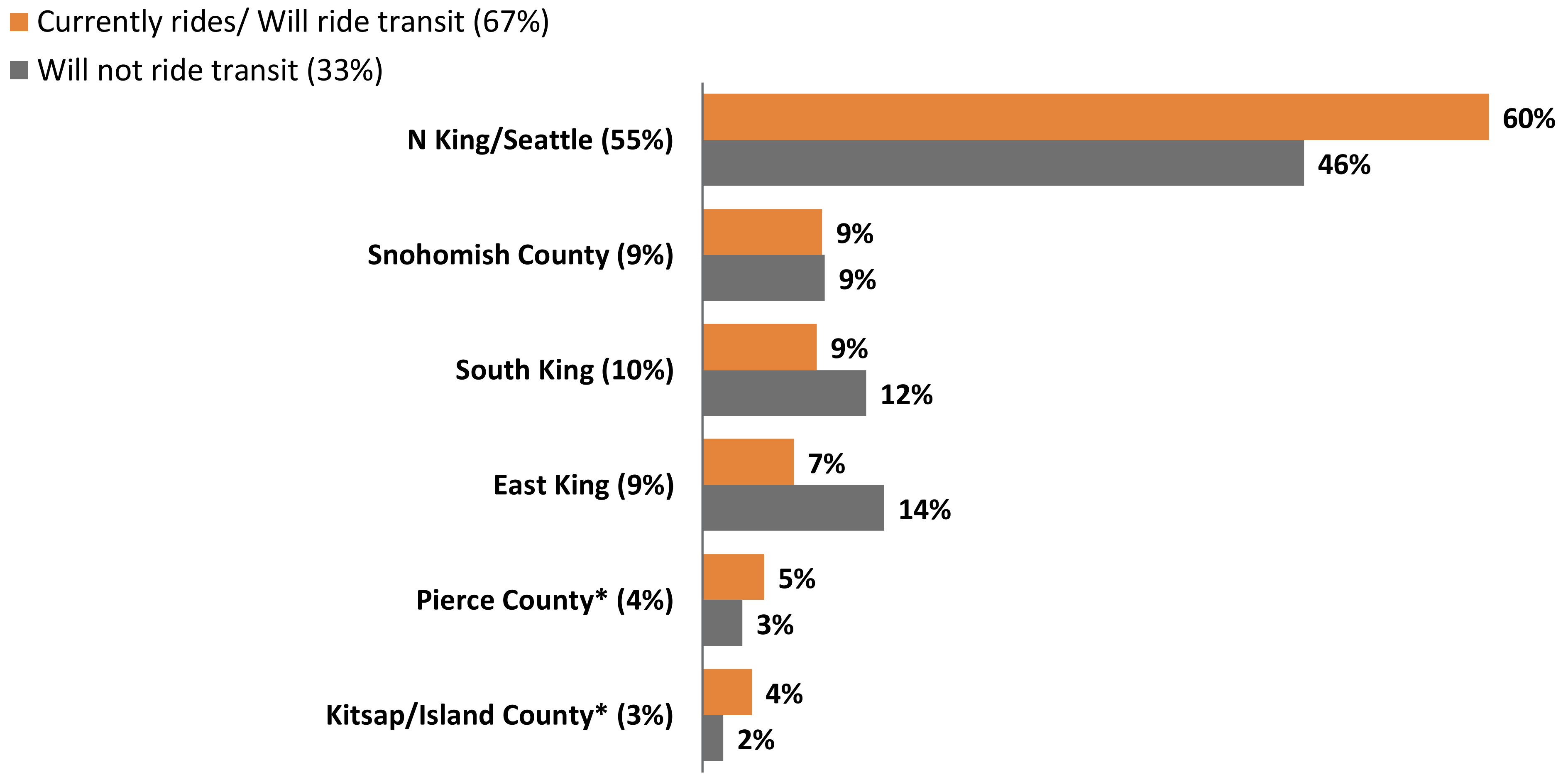
Public administration and engineering/accounting/research/management employees are more likely to be receptive to transit; whose who are not are overrepresented in finance/insurance/real estate and health services.



Q14-16. Please indicate whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with each of the following statement: I plan to use public transit services more often once the pandemic is no longer a serious public health threat.

Commute Trip Origin by Transit Attitudes

Many of those who are receptive to transit commute to downtown Seattle from within the City.



** The small sample sizes compute for a higher margin of error for these geographies.*

Q14-16. Please indicate whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with each of the following statement: I plan to use public transit services more often once the pandemic is no longer a serious public health threat.

Top-of-Mind Perceptions (All Respondents)

Mode Improvement – Public Transit

Q17 (Asked of all respondents)	Overall	CTR-Affected	Non-affected
More routes/More frequent service/Expanded service	31%	33%	29%
Faster service/Fewer stops or transfers/Better connection for transfers	12%	12%	11%
Safer transit/stops	12%	12%	12%
More convenient/closer stop/routes	11%	10%	12%
More reliable/On time/Accurate real-time info	10%	10%	10%
More direct routes/no/less transfers	9%	9%	9%
More/better Park and Rides/More parking near stops	6%	7%	5%
Will never ride/Cannot ride/Don't need to ride	5%	4%	7%
Cleaner or more comfortable transit/stops	4%	5%	4%
Address the issue of mentally ill/homeless/drug addicts on transit/at stops	4%	4%	5%
Cheaper fares/Employer-subsidized transit	4%	3%	5%
Already riding often/Happy with service	4%	5%	2%
Less crowding/More capacity	4%	5%	2%
Won't travel until COVID is over/No pandemic	3%	3%	3%
More express routes/Rapid Rides	3%	3%	2%
Enforcing COVID precautions	3%	3%	2%
Better/safer bike lanes/dedicated bike lane/bike parking	2%	2%	2%
Other	11%	11%	11%
Nothing/Don't know	7%	5%	9%

Q17. What would make public transit work better for your commute, if anything?

Mode Improvement – Remote Work

Q18 (Asked if remote work available at worksite)	Overall (Weighted n=919)	CTR-Affected (Weighted n=664)	Non-affected (Weighted n=254)
Fine as is/prefer remote working	19%	19%	18%
Make it more frequent/permanent/allow working remotely	14%	17%	8%
Better/faster internet	9%	8%	10%
More space/better home office setup/dedicated space	6%	6%	8%
Subsidy for internet/workspace/equipment provided by employer	6%	7%	3%
Better office equipment/provide supplies (printers/scanners/headphones etc.)	5%	5%	3%
Job not conducive to remote working/dislike working remotely	4%	3%	6%
Flexible schedule/hybrid work schedule	3%	4%	2%
Better desk and chair/furniture/ergonomic equipment	3%	4%	0%
More reliable commute options for when I need it	3%	3%	2%
Better IT equipment/tech support	2%	3%	2%
Other	9%	10%	8%
Don't know	2%	1%	2%
Nothing	25%	21%	33%

Q18. What would make working remotely work better for your commute, if anything?

Reasons for Driving Alone

Q19 (Asked if respondent drives alone to work once a week or more)	Overall (Weighted n=508)	CTR-Affected (Weighted n=216)	Non-affected (Weighted n=292)
Flexibility/Timing of work/Works with my schedule	38%	39%	37%
Faster/fastest way	19%	23%	15%
No other people in my area to carpool with	15%	15%	15%
General convenience mention	13%	12%	13%
COVID safety	12%	14%	10%
General safety	10%	12%	9%
Need my car at work/Carry items/Large items to work	9%	5%	13%
I like it/Prefer to drive alone/Mobility challenges	6%	6%	6%
Easy to park/Free parking/Parking is available	5%	5%	6%
Easier/easiest	4%	4%	5%
Commute too short/too long	4%	3%	4%
Not suitable/No nearby public transit option	3%	4%	2%
Public transportation is unreliable/not on time/runs less frequently	3%	4%	2%
Weather/Do not have to wait/walk/bike in rainy/bad weather	2%	2%	2%
Other	5%	4%	6%
Don't know	0%	0%	-
Nothing	4%	1%	6%

Q19. What are the main reasons you drive alone to work when you choose this option?

Appendix

The slides in this section are reflective of *all* survey respondents, regardless of the days or times they commute to Center City

Commute Seattle Data Weighting

- To better approximate the broader universe of Center City commuters, the final survey data was weighted based on the reported WSDOT CTR employee counts and estimated Data Axle USA counts of the non-affected commuter population:
  - The estimated proportions of CTR-affected and non-affected commuters were weighted within each neighborhood, when applicable.
  - Non-CTR affected sites were further refined to reflect the estimated share of each worksite size category (1-4, 5-9, 10-19, 20-49, 50+) in the non-affected universe.
  - CTR worksites were weighted to closer reflect their employees' estimated share of the 32 worksites that participated in the study.
    - Some CTR-affected worksites were weighted as their own category to prevent any single worksite from dominating neighborhood-level results. For anonymity purposes, they are designated as Worksite 1, Worksite 2 etc. on the next slide.
  - TMP responses were weighted to equally represent the two neighborhoods we received responses from.

Weighting – All Respondents

Non-Affected

Category	# of participating worksites	Unweighted		Counts		Weighted	
		n	%	N	%	n	%
1-49 Belltown NA	29	91	9%	6607	7%	35	7%
1-49 Capitol Hill NA	9	23	2%	2290	2%	12	2%
1-49 Chinatown/ID NA	13	35	4%	2351	2%	13	2%
1-49 Commercial Core NA	85	322	33%	12721	13%	68	13%
1-49 Denny Triangle NA	19	54	5%	2521	3%	13	2%
1-49 First Hill NA	13	23	2%	4811	5%	26	5%
1-49 Pike/Pine NA	20	53	5%	2917	3%	16	3%
1-49 Pioneer Square NA	15	55	6%	2936	3%	16	3%
1-49 SLU NA	10	19	2%	3252	3%	17	3%
1-49 Uptown NA	17	35	4%	4634	5%	25	5%
50+ NA	6	154	16%	31317	32%	167	32%
Commercial Core TMP	1	39	4%	11762	12%	60	11%
Other TMP	1	81	8%	10082	10%	60	11%
1 to 4 NA	154	179	18%	8469	9%	45	9%
5 to 9 NA	33	119	12%	10530	11%	56	11%
10 to 19 NA	28	186	19%	9981	10%	53	10%
20 to 49 NA	15	226	23%	16060	16%	86	16%
50+ NA	6	154	16%	31317	32%	167	32%
TMP	2	120	12%	21844	22%	120	23%
Total		**984**		**98801**		**528**	

CTR-Affected

Category	# of participating worksites	Unweighted		Counts		Weighted	
		n	%	N	%	n	%
Commercial Core	15	837	25%	2343	15%	170	21%
SLU	4	169	5%	500	3%	40	5%
Denny+Uptown+Belltown	5	261	8%	1698	11%	89	11%
Worksite 1		647	19%	5500	36%	227	28%
Worksite 2		479	14%	1000	7%	57	7%
Worksite 3		248	7%	1350	9%	73	9%
Worksite 4		226	7%	624	4%	36	5%
Worksite 5		183	5%	720	5%	40	5%
Worksite 6		120	4%	800	5%	40	5%
Worksite 7		110	3%	523	3%	28	3%
Worksite 8		107	3%	160	1%	9	1%
Total		**3387**		**15218**		**809**	

Response Rates

EMC research

Non-affected Worksite Survey Response Rates			
	Surveys Distributed	Surveys Completed (n)*	Response Rate (%)
Neighborhood			
Belltown	132	75	57%
Commercial Core	742	408	55%
Capitol Hill/Pike/Pine/First Hill	330	76	23%
Chinatown-ID/Pioneer Square	140	74	53%
Denny Triangle/SLU/Uptown	205	92	45%
Employee Size			
1 to 9	281	168	60%
10 to 49	769	403	52%
50+	499	154	31%

CTR-affected Worksite Survey Response Rates			
	Surveys Distributed	Surveys Completed (n)*	Response Rate (%)
Overall	15,218	3,387	22%

Brian Vines
brian@emcresearch.com
206.204.8034

Ayse Toksoz
ayse@emcresearch.com
206.204.8047