

2008 Mode Share Survey Summary Report

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Submitted by:



Opinion Research Northwest

Seattle

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Downtown Bellevue

WSDOT's GTEC Survey results were combined with CTR surveys completed by the following businesses in the Downtown Bellevue MMA:

- CH2M Hill
- ChemPoint
- City of Bellevue
- Drugstore.com
- GE Capital
- HDR Engineering Inc
- HNTB Corporation
- Key Bank of Washington
- MulvannyG2 Architecture
- Nordstrom
- Overlake Hospital Medical Center (at 112th/12th bldg)
- PACCAR Inc
- Parametrix Inc
- Puget Sound Energy
- Symetra Financial
- US Bank of Washington
- Waggener Edstrom

Of 5,099 surveys included for the Downtown Bellevue MMA, 4,403 surveys were completed by employees at the CTR affected worksites listed above. The remaining 696 surveys were completed for the Washington State Department of Transportation's Growth and Transportation Efficiency Center (GTEC) Survey effort in summer of 2008. A total of 80 non-CTR affected businesses participated in the WSDOT GTEC Survey.

The results are based on weighted data in order to correct for over representation of large businesses (businesses with 100 or more employees) and under representation of small businesses with fewer than 100 employees. Unlike the previous surveys in 2002 and 2005, when weighting was developed just for two business segments - small businesses with fewer than 100 employees and large businesses with 100 or more employees - the weighing scheme for the 2008 survey follows the WSDOT GTEC Survey weighting protocol by five (5) business cohorts.

Commute Modes “Used During Previous Week”

All respondents were asked about the modes used to travel to work in the week prior to the survey period.

The majority (90%) of Downtown Bellevue respondents report the week prior to taking the survey was a typical commute week for them.

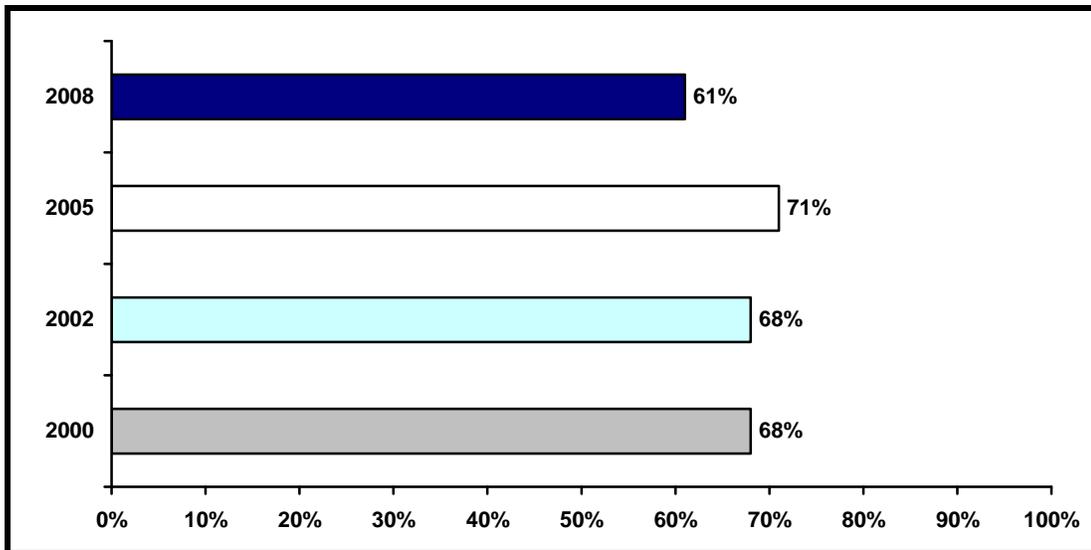
Drive-Along Rate

The aggregate drive-alone rate for employee commute trips for all companies in Downtown Bellevue measured 61% in 2008.³ This is a significant drop from the 71% reported in 2005.

Non-drive-alone commute “Mode Split” measured 39% in 2008. This is a significant improvement from the 2005 figure of 29% of commute trips made by a travel mode other than drive-alone.

However, the 39% figure for non-drive-alone Mode Split falls slightly short of the City’s adopted Mode Split target of 40% for Downtown Bellevue.

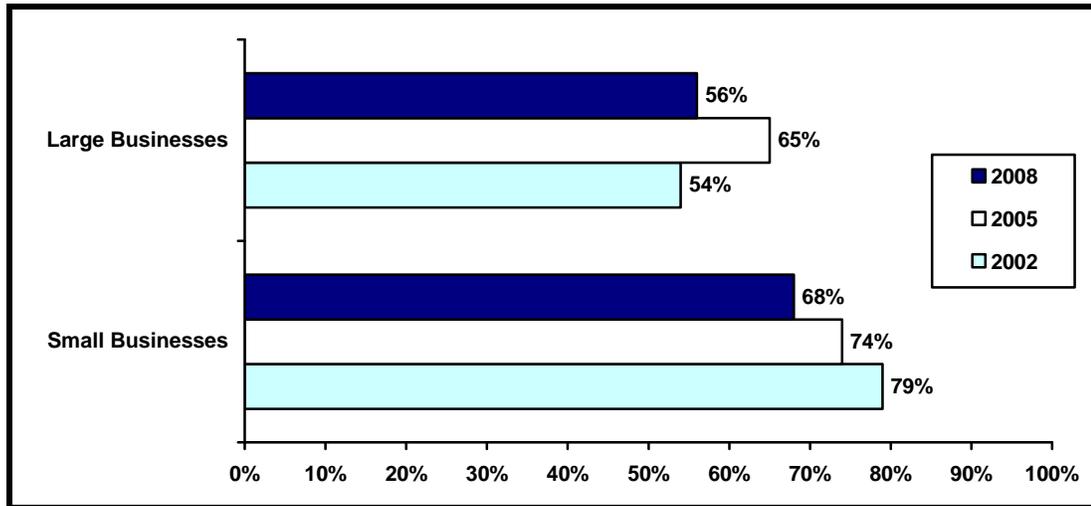
*Figure 12: Drive-Along Rate
Downtown Bellevue
(Base=Number of Trips)*



³ Note: The drive-alone rate calculation is a straight measure of Single Occupancy Vehicle vs. non-SOV modes used. This differs from the method used by the State of Washington for calculating the “SOV rate” at employers affected by the Commute Trip Reduction program as well as for the WSDOT GTEC Survey conducted in Summer 2008, wherein the “PersonScaleFactor” is applied for “compressed work week / days off”. The City has no specific policy basis for applying a weight to any particular mode and counts compressed work week days off as a simple “trip” by non-driving-alone mode.

The drive-alone rate in 2008 has declined for both large and small businesses. The drive-alone rate for small businesses continues its downward trend – to 68% in 2008 from 74% in 2005 and 79% in 2002.

**Figure 13: Drive-Along Rate by Business Size
Downtown Bellevue
(Base=Number of Trips)**



Commute Mode Split

Commute Mode Split measures the type of transportation used by respondents to commute to work during the week prior to the survey. To provide an aggregate measure for the entire week, data on the commute mode used during the week prior to the survey data collection period is based on the total number of commute trips.

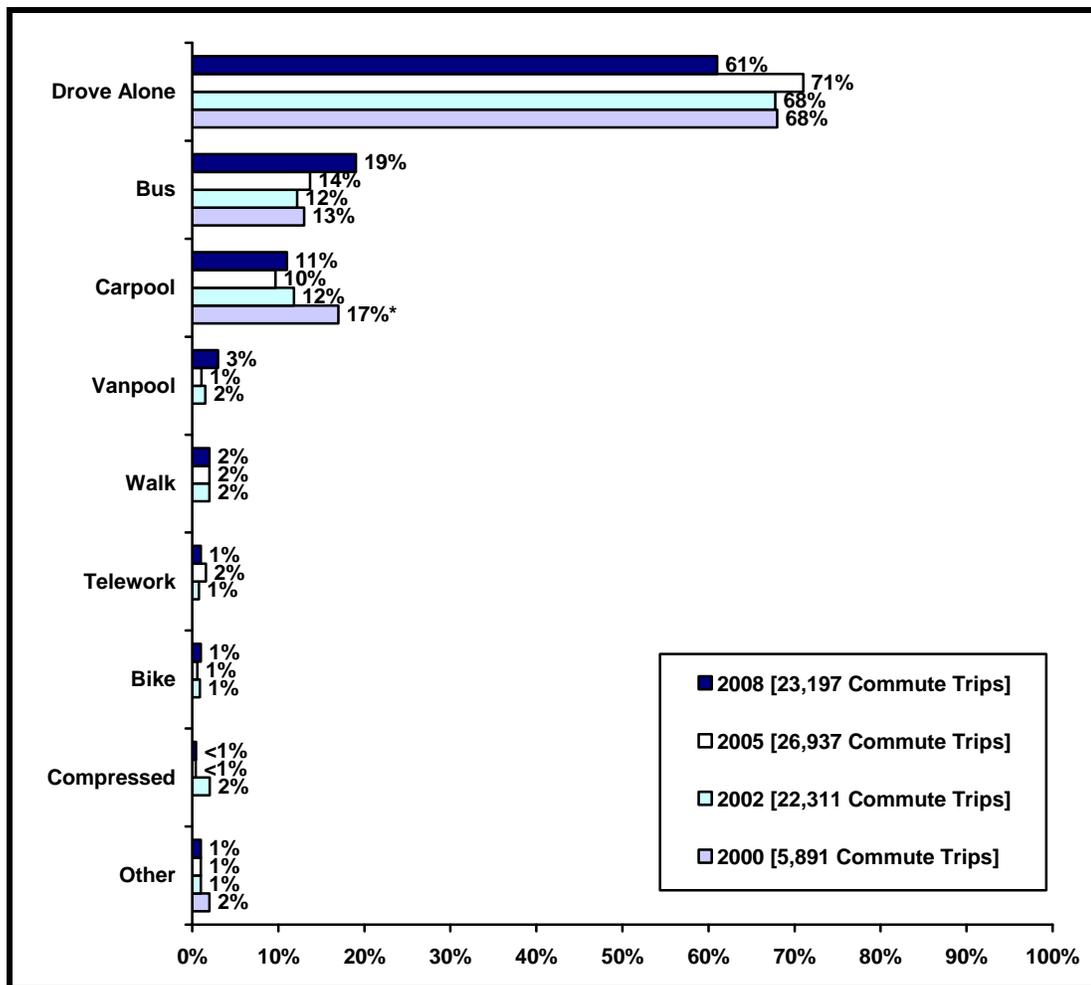
In 2008, driving alone continues to represent the majority of commute trips among Downtown Bellevue employees (61%). However, the proportion of commute trips made by driving alone dropped significantly from the 71% reported in 2005.

The percentage of commute trips made by bus continues an upward trend - to 19% in 2008 from 14% in 2005 and 12% in 2002.

Commute trips by carpool have remained fairly consistent: 11% in 2008, 10% in 2005, and 12% in 2002.

The remaining modes represent a very small proportion of commute trips among Downtown Bellevue employees.

**Figure 14: Commute Mode Split
Downtown Bellevue
(Base=Number of Trips)**

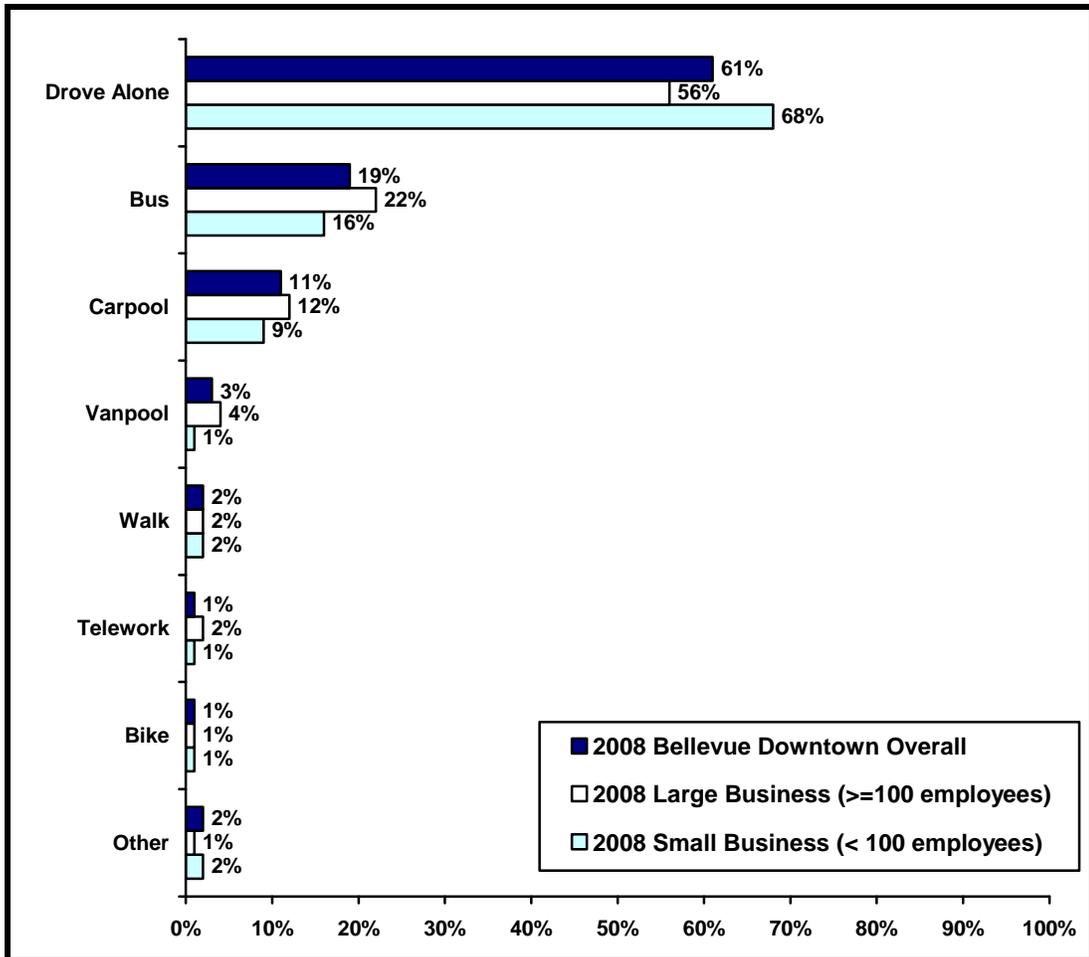


* The 2000 data for carpool included both carpool and vanpool trips.

Similar to the overall results, driving alone represents the majority of commute trips regardless of company size.

However, when comparing commute modes by company size, employees of large businesses use alternative commute modes more than employees of small businesses. In particular, employees of large businesses were more likely to commute by bus (22% of commute trips) than were employees of small businesses (16% of commute trips).

**Figure 15: Commute Mode Split by Company Size
Downtown Bellevue
(Base=Number of Trips)**



The drive-alone rate of employees at businesses with 100 employees or more is 56%, the lowest drive alone rate of the business size comparison groups. The drive-alone rates for businesses with 20 or more employees are significantly lower than the drive-alone rates for businesses with fewer than 20 employees, 78% for businesses with 10 to 19 employees, and 74% for businesses with fewer than 10 employees.

- The proportion of commute trips by bus varies depending on business size, with larger businesses having a higher usage rate. More than one out of four commute trips among employees at businesses with 50 to 99 employees (25%) and those at larger employers - over 100 employees - (22%) are made by bus, compared to 15% or fewer commute trips among employees at smaller worksites - less than 50 employees – that are made by the bus.

Table 16 : Commute Modes by Size of Worksite
(BASE = Number of Trips)

	Under 10 Employees	10 to 19 Employees	20 to 49 Employees	50 to 99 Employees	100 or More Employees
Drove Alone	74%	78%	68%	58%	56%
Bus	12%	7%	15%	25%	22%
Carpool	7%	7%	10%	10%	12%
Vanpool	<1%	1%	2%	1%	4%
Walk	4%	2%	1%	2%	2%
Telework	<1%	1%	<1%	1%	2%
Bike	<1%	<1%	0%	3%	1%
Other	1%	3%	3%	<1%	1%

The table below compares the commute split among those employees who are usually scheduled to begin work between 6 and 9 a.m. and those who are not.

The drive-alone rate among those employees who are usually scheduled to begin work between 6 and 9 a.m. is significantly lower than the drive-alone rate among those who are not (60% compared to 73%).

Table 17 : Commute Modes by Work Schedule
(BASE = Number of Trips)

	Begin Work between 6 and 9 a.m.	Do Not Begin Work between 6 and 9 a.m.
Drove Alone	60%	73%
Bus	20%	11%
Carpool	11%	9%
Vanpool	3%	<1%
Walk	2%	2%
Telework	1%	3%
Bike	1%	<1%
Other	2%	2%

Frequency of Alternative Mode Usage

The following table illustrates the frequency of each of the four alternative modes used by employees in Downtown Bellevue who report they used these alternative modes in the past week to commute to work.

Table 18 : Frequency of Commute Modes Used in the “Previous Week”
(BASE = Respondents Who Used Each of the Alternative Commute Modes)

	Carpool [n _w =738]	Vanpool [n _w =151]	Transit [n _w =1,108]	Bicycle [n _w =67]
Once a week	19%	10%	7%	26%
Twice a week	16%	3%	7%	21%
Three times a week	14%	10%	14%	12%
Four times a week	16%	20%	20%	18%
Five or more times a week	34%	57%	52%	24%

Downtown Bellevue Respondent Profile

Occupation of Respondents

Forty-two percent (42%) of respondents report they perform professional or technical work for their employer. This represents a significant decline in the percentage of respondents who indicate they perform this type of job compared to 2005. Nearly one out of ten (8%) of respondents in 2008 report they perform customer service work for their employer – a significant increase from 5% in 2005.

**Table 19 : Type of Work
(BASE = All Respondents)**

	Percent of Employees 2008 [n _w =5,099]	Percent of Employees 2005 [n _w =5,574]	Percent of Employees 2002 [n _w =4,623]
Professional / Technical	42%	46%	42%
Management	17%	16%	17%
Administrative Support	16%	15%	15%
Sales / Marketing	10%	12%	14%
Customer Service	8%	5%	7%
Craft / Production / Labor	1%	1%	2%
Other	6%	5%	4%

Comparing the types of jobs, or occupations between respondents at large and small businesses, respondents at large businesses tend to perform more professional or technical work for their employers while respondents at small businesses tend to perform more sales and marketing or customer service functions.

- Less than one-fifth (18%) of employees at smaller businesses - those with fewer than 20 employees - report they perform professional or technical work for their employer, while nearly half (47%) of employees at businesses with more than 20 employees indicate they perform similar work.
- On the other hand employees at businesses with fewer than 20 employees are significantly more likely than employees who work for a larger business to report they are in a sales or marketing position (24% compared to 8% or less).
- Those employees who are usually scheduled to begin work between 6 and 9 a.m. are significantly more likely than those who are not to report they perform professional / technical (44% vs. 24%) or management work (18% vs. 8%).
- Those who are not usually scheduled to begin work between 6 and 9 a.m. are significantly more likely to be in a sales / marketing (22% vs. 9%) or customer service (19% vs. 7%) position.

**Table 20 : Type of Work by Business Size
(BASE = All Respondents)**

	Percent of Employees - 2008 Large Businesses [n_w=2,699]	Percent of Employees - 2008 Small Businesses [n_w=2,400]
Professional / Technical	48%	35%
Management	17%	16%
Administrative Support	14%	18%
Sales / Marketing	8%	13%
Customer Service	7%	10%
Craft / Production / Labor	1%	2%
Other	6%	6%

Current Commute Behavior

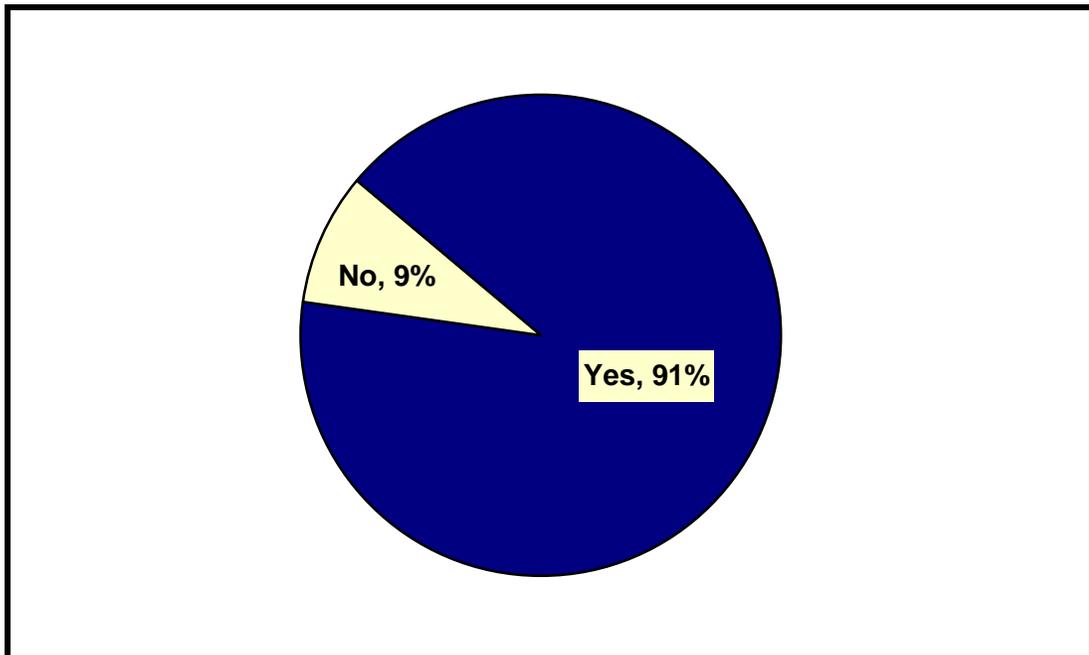
Work Schedule

The majority (91%) of Downtown Bellevue employees report they usually work 35 or more hours per week in a position intended to last 12 months or more, similar to the 92% reported in 2005 and the 90% reported in 2002.

Similar to 2005, significantly more respondents who usually work at least 35 hours per week report they begin work at their work location between 6 and 9 a.m., compared to those who work fewer hours (93% compared to 61%, respectively).

- When comparing the results by the number of employees, significantly more respondents at large businesses (with 100 or more employees) report they usually work at least 35 hours per week, than respondents at businesses with fewer than 100 employees (94% compared to 86%, respectively).

**Figure 21: Usually Work at Least 35 Hours per Week
Downtown Bellevue
(Base=All Respondents [$n_w=5,099$])**



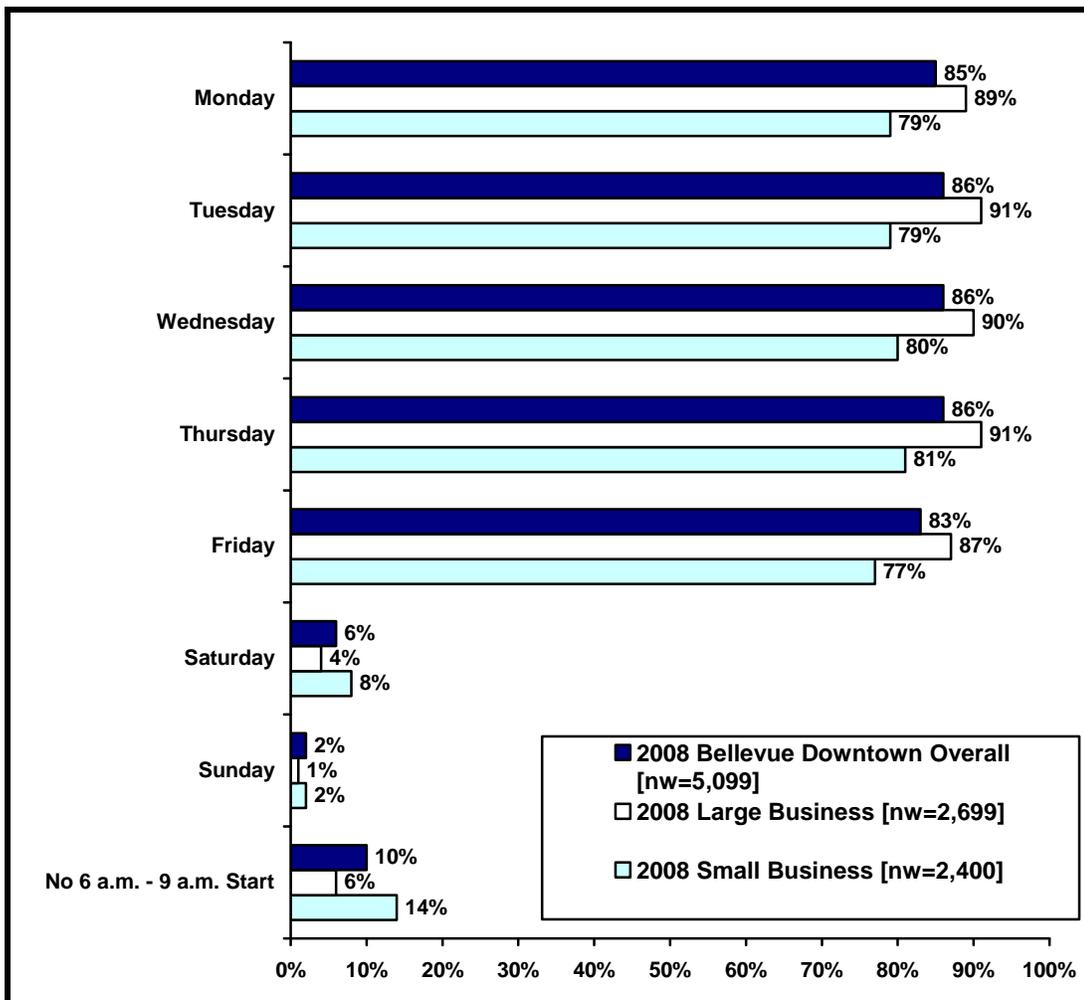
The majority (90%) of Downtown Bellevue employees report they are scheduled to begin work at their location between 6 and 9 a.m.

- Significantly more respondents at large companies report they are scheduled to begin work between 6 and 9 a.m., 94% of respondents at large businesses compared to 85% of small business employees.
- Employees at companies with 20 employees or more are significantly more likely than those at smaller companies to begin work between 6 and 9 a.m. (87% or more, compared to 81% or fewer of employees at companies with fewer than 20 employees).

When asked about which days during the week prior to completing the survey they were scheduled to begin work between 6 and 9 a.m., the majority of Downtown Bellevue employees report they were scheduled to begin work between 6 and 9 a.m. Monday through Friday during the previous week.

- Employees at small businesses are significantly more likely than employees at large businesses to report they were not scheduled to begin work between 6 and 9 a.m. any day of the previous week (14% compared to 6%, respectively).

**Figure 22: Scheduled to Work between 6 and 9 a.m.
Downtown Bellevue
(Base=All Respondents)**



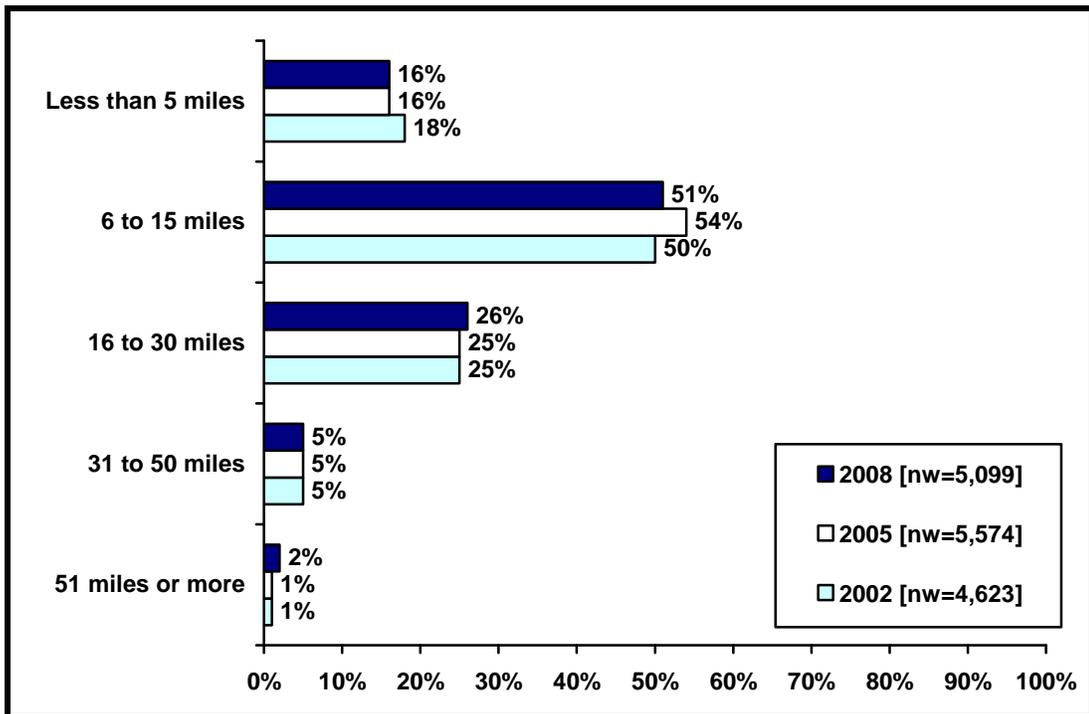
Commute Distance

The average commute distance, regardless of commute mode, for Downtown Bellevue employees in 2008 is 14.97 miles, similar to previous years (14.46 miles in 2005 and 14.48 miles in 2002).

Two-thirds (67%) of respondents report they commute less than 16 miles one-way to work; two percent (2%) report they commute more than 50 miles one-way to work in 2008.

- As in 2005, sixteen percent (16%) of Downtown Bellevue employees indicate their one way commute distance is less than 5 miles.

*Figure 23: Commute Distance
Downtown Bellevue
(Base=All Respondents)*



The following table presents the reported one-way commute distance between respondents' home and work locations by major commute mode.

The 2008 average one-way commute distance remains similar to that in 2005 and 2002 across all four major commute modes (SOV, Carpool, and Bus) with the exception of Vanpool. The average distance among those who report using vanpool during the previous week to work has increased by approximately 2 miles from 27.92 miles in 2005 to 30.07 miles in 2008.

- The average one-way commute distance of Downtown Bellevue employees who drive alone continues to be approximately 14 miles (14.1 miles in 2008 compared to 13.9 miles in 2005 and 14.1 miles in 2002).

Table 24 : 2008 Commute Distance by Commute Mode
(Base = Respondents Who Used Each Mode during Previous Week)

	SOV [n _w =3,417]	Carpool [n _w =738]	Vanpool [n _w =151]	Bus / Train [n _w =1,108]
5 miles or less	15%	13%	1%	12%
6 to 15 miles	55%	44%	16%	51%
16 to 30 miles	24%	32%	51%	29%
31 to 50 miles	5%	10%	22%	6%
51 miles or more	1%	1%	11%	2%
Overall average distance	14.14 miles	16.87 miles	30.07 miles	15.87 miles

	Walk [n _w =122]	Bicycle [n _w =67]
Less than 1 Mile	36%	0%
1 to 2 miles	54%	11%
3 to 5 miles	4%	5%
6 to 10 miles	3%	36%
11 to 20 miles	1%	44%
21 miles or more	2%	5%
Overall average distance	2.08 miles	10.84 miles

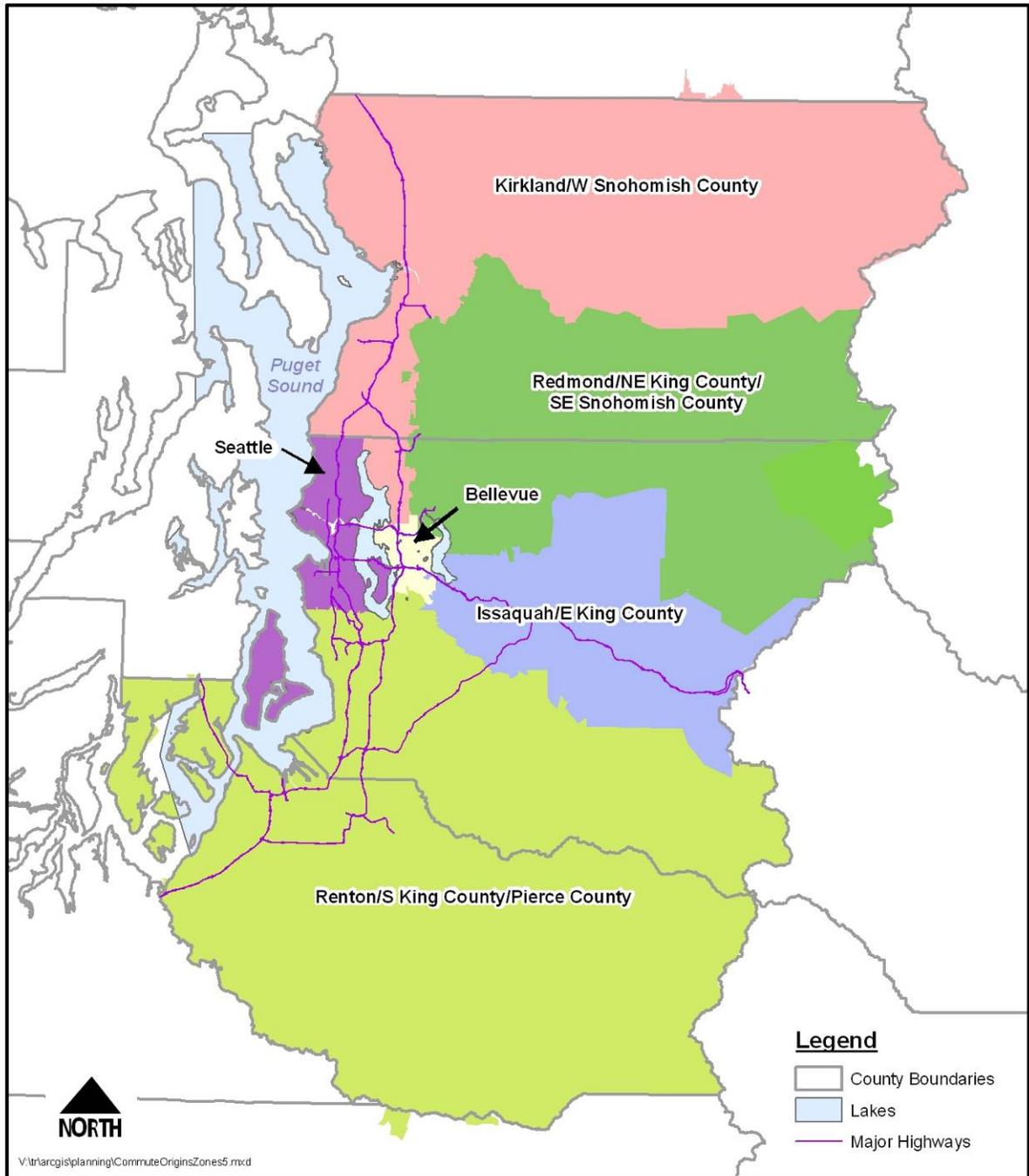
Location of Residence

All respondents were asked to provide their home zip code. The table below presents the area of residence by major geographic area.

Table 25 : Residential Location of Employees
(BASE = All Respondents)

	2008 Overall [n _w =5,099]	2008 Large Business [n _w =2,699]	2008 Small Business [n _w =2,400]
Bellevue	17%	16%	18%
Seattle	18%	20%	16%
Kirkland	8%	7%	9%
W Snohomish County	14%	15%	13%
Redmond / NE King County / SE Snohomish County	14%	14%	15%
Issaquah / E King County	7%	8%	7%
Renton / South King County / Pierce County	19%	18%	21%
Other	2%	3%	2%

Figure 26 : Commute Origin Zones



The following table illustrates the commute modes used by employees in Downtown Bellevue by their residence location. Because some commuters used different modes on various days of the survey week, totals are greater than 100%.

Table 27 : Commute Mode Used in the “Previous Week” by Location of Residence (BASE = All Respondents)

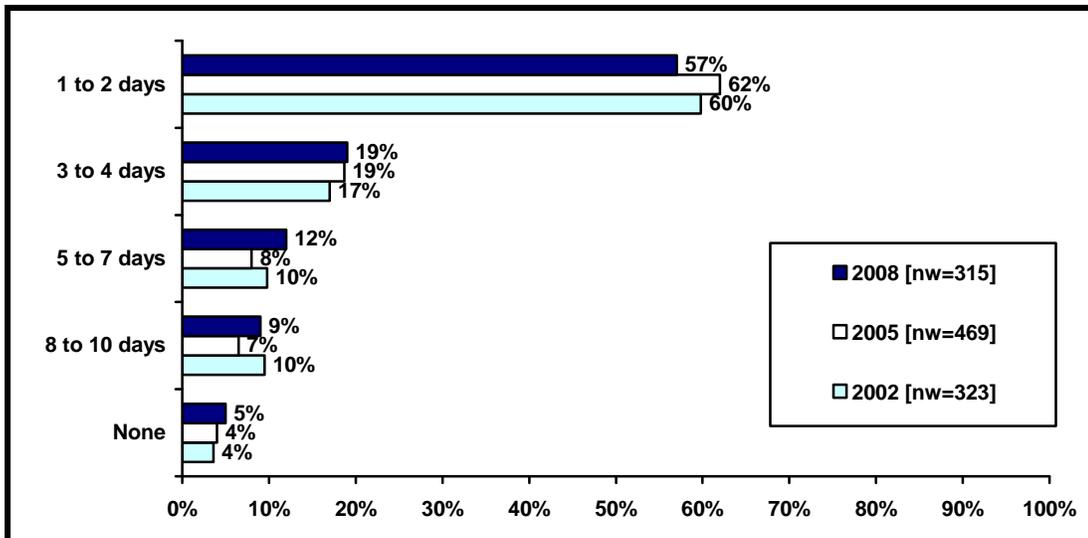
	Bellevue	Seattle	Kirkland	W Snohomish County	Redmond / NE King & SE Snohomish County	Issaquah / E King County	Renton / S King & Pierce County	Other
Drive alone	71%	69%	82%	62%	78%	81%	66%	59%
Carpool	13%	11%	10%	21%	18%	17%	17%	10%
Vanpool	<1%	2%	0%	7%	1%	1%	6%	14%
Transit (Bus / Train)	15%	33%	21%	31%	18%	11%	22%	23%
Bike	2%	3%	1%	<1%	1%	<1%	2%	0%
Walk	14%	<1%	1%	<1%	<1%	0%	<1%	2%
Telework	2%	5%	2%	4%	4%	2%	4%	16%

Telework

As in 2005, fewer than one in ten (7%) Downtown Bellevue respondents report teleworking at least one day in two weeks, on average.

Of those respondents who telework at least one day in two weeks, more than half (57%) report they teleworked one or two days in the last two weeks.

Figure 28: Number of Days Teleworked in Last Two Weeks Downtown Bellevue (Base= Respondents Who Telework At Least One Day in Two Weeks On Average)



When comparing respondents' likelihood to try alternative modes between large and small businesses, a significantly greater proportion of small businesses employees report most of the alternative modes are not an option for them.

- Significantly greater numbers of small business employees indicate telework (32%) and a compressed work-week (59%) are not options for them, while more than half of large businesses' employees report they are likely to try telework (53%) and a compressed work-week (50%).

**Table 30: Likelihood to Try Alternative Modes by Business Size
(BASE = All Respondents)**

Mode	2008 Large Business [n _w =2,699]				2008 Small Business [n _w =2,400]			
	Do Now	Likely	Not Likely	Not An Option	Do Now	Likely	Not Likely	Not An Option
Carpool	17%	32%	39%	13%	15%	32%	38%	15%
Vanpool	6%	23%	54%	17%	2%	24%	56%	19%
Bus	30%	32%	27%	12%	20%	40%	28%	12%
Train	1%	16%	14%	69%	3%	16%	32%	50%
Bicycle	3%	13%	35%	49%	5%	8%	31%	57%
Walk	4%	5%	23%	68%	3%	33%	24%	40%
Telework	9%	53%	13%	24%	8%	38%	22%	32%
A compressed work week	9%	50%	18%	23%	1%	21%	18%	59%

The likelihood of trying alternatives to driving alone among heavy SOV commuters (those who drive alone to work 80% or more of the time) has increased in 2008, with the exception of telework, compressed work schedule and bicycle alternatives.

- In 2008, nearly half (46%) of the heavy SOV commuters indicate they are likely to try using the bus as an alternative to driving alone to work, compared to 35% in 2005.
- Nearly half (46%) of the heavy SOV commuters indicate they are likely to try telework; this is essentially the same as the proportion in 2005 who reported they were likely to try teleworking (48%).

**Table 31: Likelihood to Try Alternative Modes among Heavy SOV Mode Users
(BASE = Respondents Who Drive Alone to Work 80% or More of the Time)**

Mode	Heavy SOV Mode Users (80% or More of the Time) [n _w =2,707]			
	Do Now	Likely	Not Likely	Not An Option
Carpool	3%	34%	45%	18%
Vanpool	<1%	20%	58%	23%
Bus	3%	46%	35%	16%
Train	1%	14%	23%	62%
Bicycle	1%	10%	31%	57%
Walk	1%	19%	25%	55%
Telework	6%	46%	16%	31%
A compressed work week	4%	35%	17%	44%

When comparing the likelihood to try alternative modes to driving alone to work, those who are usually scheduled to begin work between 6 and 9 a.m. are more likely than those who are not to indicate they are likely to either already use or try alternative modes. Those who are not usually scheduled to begin work between 6 and 9 a.m. are more likely to indicate alternative modes are not an option for them.

- Those who are usually scheduled to begin work between 6 and 9 a.m. are significantly more likely than their counterparts to indicate they are likely to try telework (49% vs. 25%), a compressed work (39% vs. 26%), and walking to work (18% vs. 12%). In addition, they are also significantly more likely to report they already take the bus to work (26% vs. 18%).
- Significantly more Downtown Bellevue employees who are not usually scheduled to begin work between 6 and 9 a.m. indicate telework, a compressed work week, bus, carpool and vanpool are not options for them.
 - Although more than one in three (37%) employees who are not usually scheduled to begin work between 6 and 9 a.m. indicate telework is not an option for them, a significantly greater proportion (17%) of this employee segment report they already telework compared to those who are usually scheduled to begin work during the morning peak hours (8%).

**Table 32: Likelihood to Try Alternative Modes by Arrival Time
(BASE = All Respondents)**

Mode	Begin Work between 6 and 9 a.m. [n _w =4,380]				Do Not Begin Work between 6 and 9 a.m. [n _w =485]			
	Do Now	Likely	Not Likely	Not An Option	Do Now	Likely	Not Likely	Not An Option
Carpool	16%	33%	39%	13%	18%	27%	33%	22%
Vanpool	4%	24%	55%	16%	1%	19%	53%	28%
Bus	26%	36%	27%	11%	18%	30%	31%	21%
Train	2%	16%	22%	60%	2%	12%	29%	57%
Bicycle	4%	11%	33%	52%	4%	8%	36%	52%
Walk	4%	18%	23%	55%	6%	12%	24%	58%
Telework	8%	49%	17%	27%	17%	25%	21%	37%
A compressed work week	5%	39%	18%	38%	9%	26%	20%	44%

Opportunities to Encourage Employees to Try or Continue Using Alternative Modes

Similar to 2005, in 2008, the top five methods to encourage Downtown Bellevue employees to use or continue using alternate modes include a financial incentive for using a non-drive alone mode (43%); an opportunity to work at home (37%); an immediate ride home in case of an emergency (28%); more frequent bus service at the work site (23%); and a more flexible work schedule to meet carpool, vanpool, the bus, etc. (19%).

- Although an employer provided car for work during work hours was ranked fifth in 2005, in 2008 a more flexible work schedule to meet carpool, vanpool, or the bus, etc. has replaced it as fifth.

**Table 33 : Top Five Ways to Encourage Employees to Try or Continue Using Alternative Modes
(BASE = All Respondents)**

	Percent of Employees 2008 [n _w =5,099]	Percent of Employees 2005 [n _w =5,574]	Percent of Employees 2002 [n _w =4,623]
A financial incentive for using non-drive alone modes	43%	41%	43%
Opportunity to work at home (telework)	37%	38%	5%
An immediate ride home in case of an emergency	28%	28%	33%
More frequent bus service at the work site	23%	20%	22%
A more flexible work schedule to meet carpool, vanpool, the bus, etc.	19%	15%	19%

Although the top five ways to encourage Downtown Bellevue employees to use alternative modes is very similar regardless of business size, the order of item preference slightly different in a few cases.

- Across all business sizes, Downtown Bellevue employees cite a financial incentive for using non-drive alone modes as the top choice to encourage them to use an alternative to driving alone (36% among employees at businesses with fewer than 10 employees to 47% of employees at businesses with 20 to 49 employees).
- Small business employees are significantly more likely than large business employees to indicate they need personal help with forming a carpool or vanpool (7% vs. 3%) and with finding bus times and routes (6% vs. 2%).

