

2022 SEATTLE COMMUTE SURVEY

City-Wide Report



MOBILITY
INNOVATION
CENTER
at the
UNIVERSITY of WASHINGTON



UNIVERSITY of WASHINGTON
DEPARTMENT OF URBAN DESIGN AND PLANNING
College of Built Environments

ACKNOWLEDGEMENT

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Authors

Lamis Ashour, Interdisciplinary Ph.D. Program in Urban Design and Planning, University of Washington

Dr. Qing Shen, (Principal investigator & corresponding author), Professor, Department of Urban Design and Planning, University of Washington

Dr. Anne Vernez Moudon, Professor Emeritus, Department of Urban Design and Planning, University of Washington

Barton G. Treece, III, Director, Mobility Innovation Center at the University of Washington

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GLOSSARY

CTR-Affected employee: a full-time employee who begins their regular work day at an affected employer's worksite between six (6:00) a.m. and nine (9:00) a.m. (inclusive) on two (2) or more weekdays for at least twelve continuous months, who is not an independent contractor, and who is scheduled to be employed on a continuous basis for fifty-two weeks for an average of at least thirty-five hours per week.

CTR-Affected employer: a private or public employer, including government agencies, that employs one hundred (100) or more affected employees at a single worksite.

TMP: Transportation Management Programs are agreements developed by the City of Seattle and property developers when a building is first built that commits the building's managers to encourage their tenants' employees to walk, bike, use transit and carpool, rather than drive alone.

Commute trips: trips made from an employee's residence to a worksite during the peak period of 6 a.m. to 9 a.m. on weekdays.

Worksite: a building or group of buildings on physically contiguous parcels of land or on parcels separated solely by roadways or rights-of-way.

Small businesses: any business entity, corporation, partnership, or other legal entity, that has less than one hundred (100) employees.

Commute mode: the type of transportation used by employees, such as public transit, drive-alone, active modes or any other mode of mobility.

Rideshare: this term is used in this report to refer to shared modes of transportation including carpool, vanpool, and employer shuttle.

Work model: the working arrangements for employees, which determine where employees conduct daily tasks (e.g. remote work).

Active transport: also called non-motorized transport or NMT, and human powered transport, refers to walking, cycling, and variants such as wheelchair, scooter, and handcart use.

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PROJECT OVERVIEW

The Washington State Commute Trip Reduction (CTR) law requires worksites with 100 or more full-time employees who begin their shift between 6 and 9 a.m. on weekdays to conduct a biannual commute survey. Commute Seattle has led this survey work and, in partnership with the Downtown Transportation Alliance, used the results to measure progress toward the city's mobility goals. In 2022, Commute Seattle joined the Mobility Innovation Center and the Department of Urban Design and Planning at the University of Washington to further improve and expand upon the survey and evaluate current transportation systems. Commute Seattle has conducted an internationally renowned expansion of the survey since 2010 known as the Center City Mode Split Survey to include small businesses for additional insights and depict a comprehensive picture of travel in the Center City. This report provides insights from the CTR citywide dataset along with small businesses surveyed in the Center City and across the city.





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PROJECT PARTNERS

This work is supported by Commute Seattle with funding committed by the Downtown Transportation Alliance (DTA) partners, the Downtown Seattle Association (DSA), city of Seattle, King County Metro, and Sound Transit. This project is conducted in collaboration with the Department of Urban Design and Planning in the College of Built Environments (CBE) and the Mobility Innovation Center (MIC) at the University of Washington, Seattle. The project received additional funding from Challenge Seattle, Pemco Insurance, and BECU.



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SAMPLING

Commute Seattle reached out to all CTR-affected worksites and TMP buildings and acquired a list of all small businesses in central Seattle from SavageColor. The UW team launched an email campaign and sent regular follow-ups to small businesses.

DESIGN

The UW team designed the survey with valuable input from Commute Seattle. The survey contains two parts: the required CTR questions and an additional module with a gift-card incentive. The survey used Qualtrics and Google maps platforms.

SURVEY METHODS

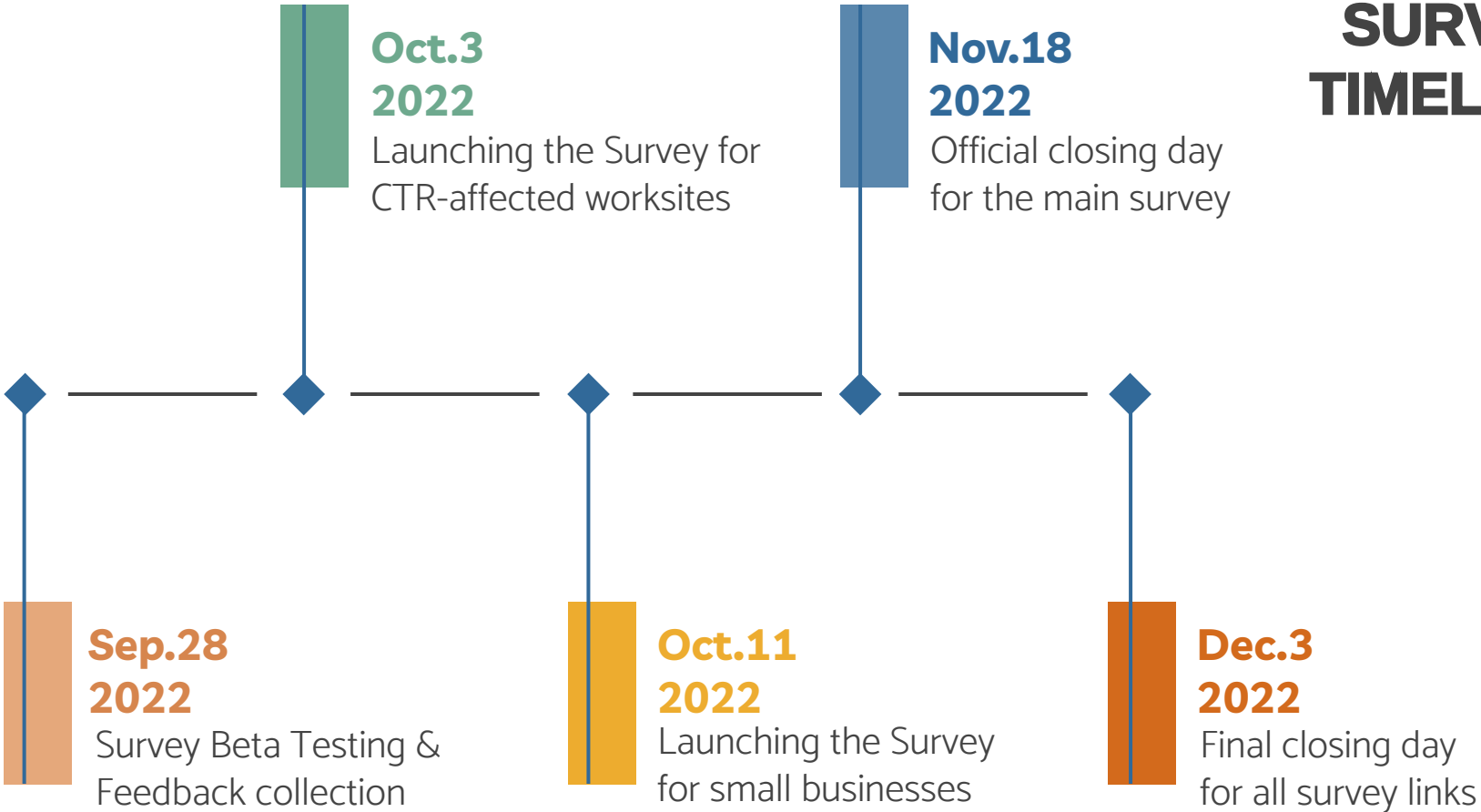
TOPICS

The CTR survey was revised and expanded to include more options for commute and work models and build a thorough understanding of the changes in spatiotemporal patterns of worker commute and non-commute trips and travel behavior, motives, and needs.

DISTRIBUTION

The survey was distributed using an anonymous link to tenants of TMP buildings and CTR worksites by an on-site work or building coordinator. It was also shared on the Commute Seattle website. Separate links were distributed to small business lists from the City and SavageColor.

SURVEY TIMELINE



SURVEY RESPONSES

In the wake of the COVID-19 pandemic, the past few years have witnessed dramatic changes in work arrangements and activity-travel behavior. The possibility that altered travel patterns may persist well into the future could profoundly impact urban mobility, commuting and non-commuting travel, and transport systems. The increased adoption of remote work has become commonplace during the recovery and post-pandemic period. In recognition of this post-pandemic moment, this project expands on the CTR survey to thoroughly understand the impact of new work models and patterns on activity-travel demand and mode choice for workers in the Seattle area.

**Overall Survey
Responses**

64,355

**Responses from
Worksites inside Seattle**

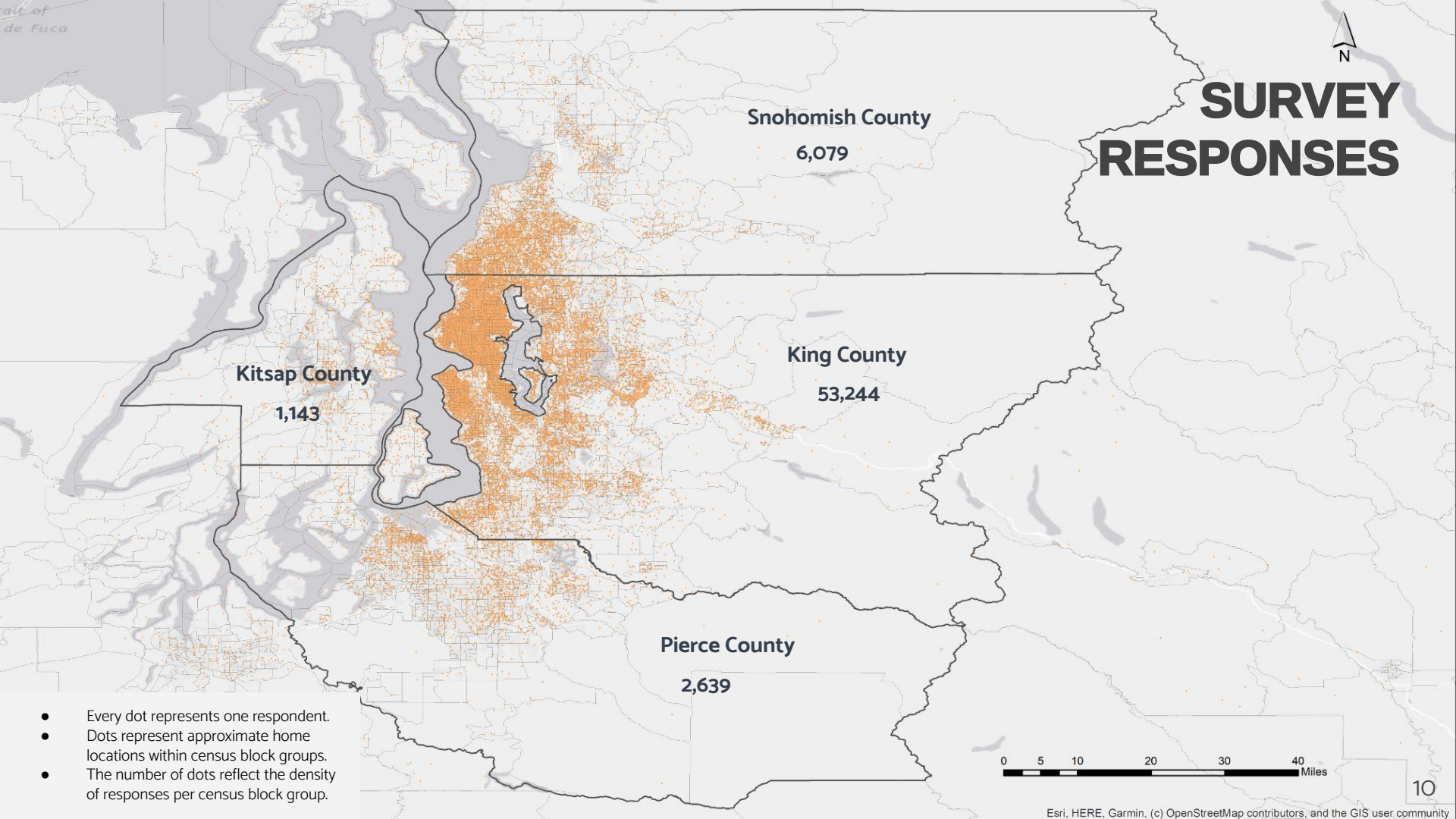
61,628

**Responses from
Center City Worksites**

47,370

**CTR-affected
Respondents**

55,965



SURVEY RESPONSES

Snohomish County
6,079

Kitsap County
1,143

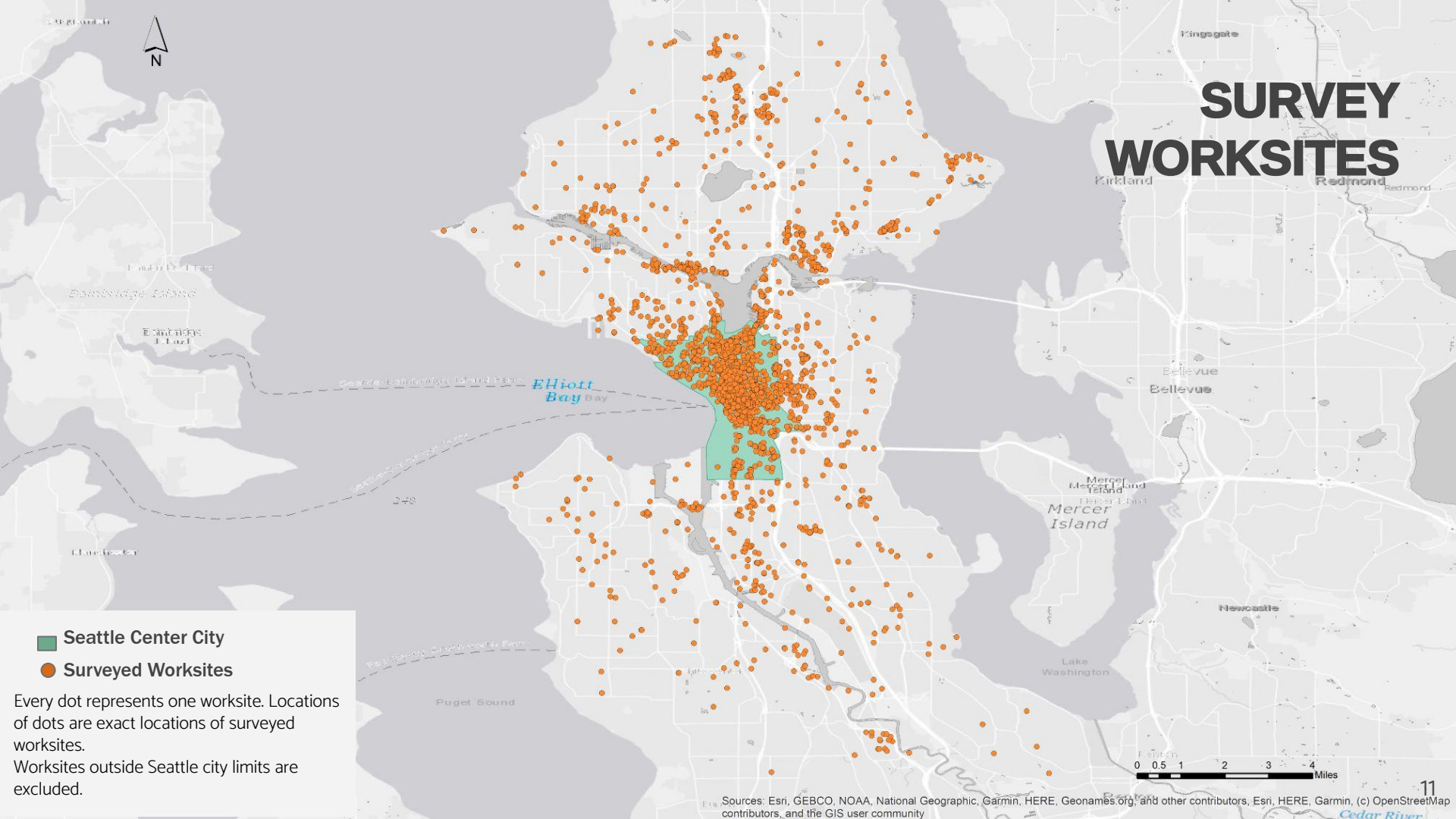
King County
53,244

Pierce County
2,639

- Every dot represents one respondent.
- Dots represent approximate home locations within census block groups.
- The number of dots reflect the density of responses per census block group.



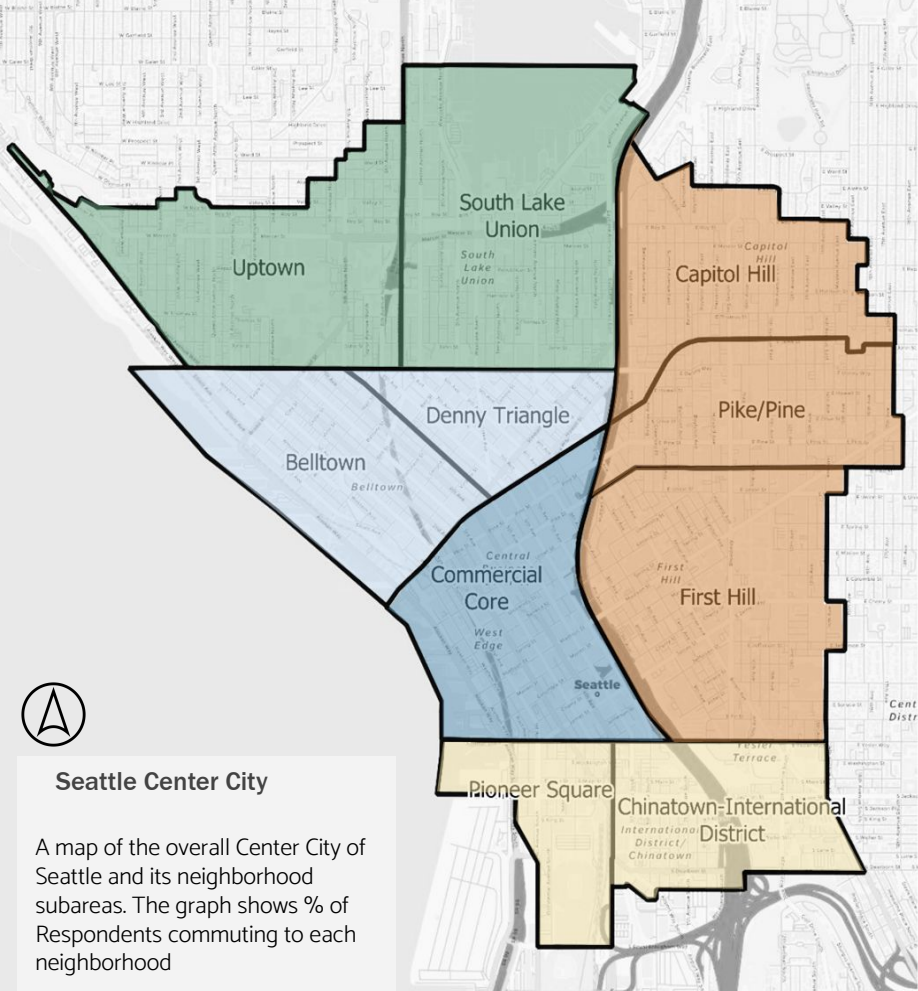
SURVEY WORKSITES



- Seattle Center City
- Surveyed Worksites

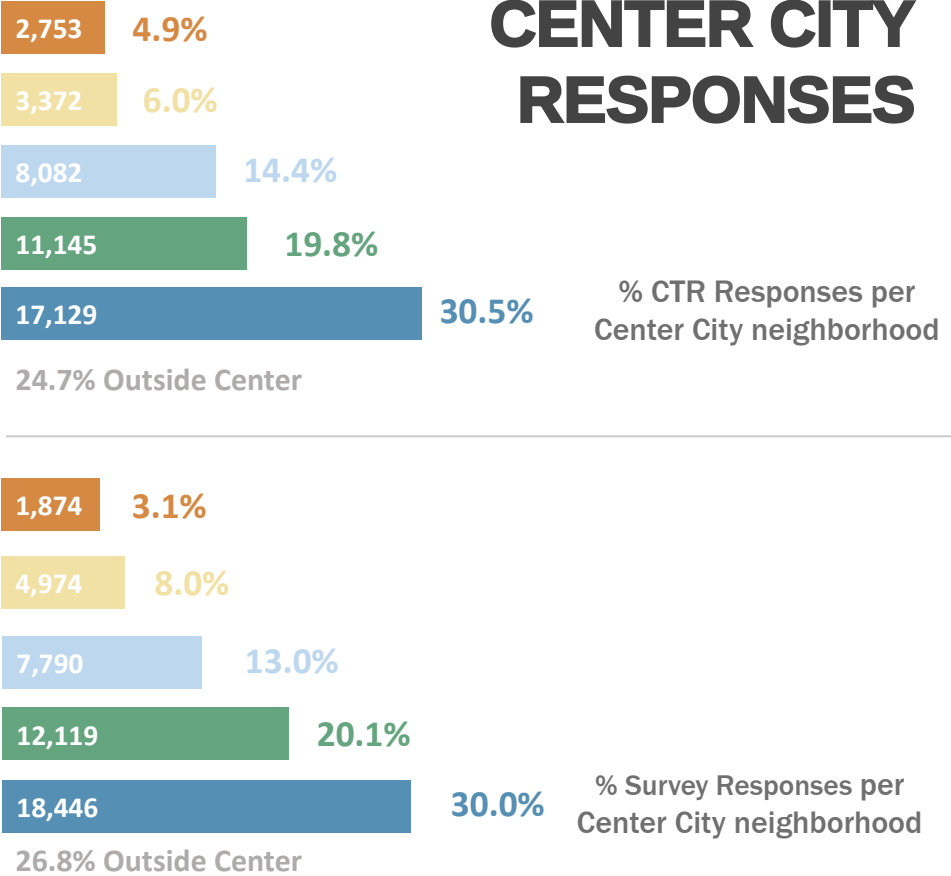
Every dot represents one worksite. Locations of dots are exact locations of surveyed worksites. Worksites outside Seattle city limits are excluded.

CENTER CITY RESPONSES



Seattle Center City

A map of the overall Center City of Seattle and its neighborhood subareas. The graph shows % of Respondents commuting to each neighborhood



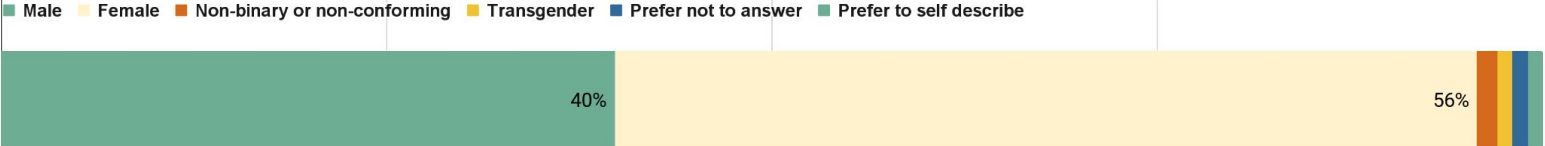
The map on this slide shows the neighborhoods which make up Seattle Center City (downtown) area. Different colors denote for neighborhood designations within the survey geography boundaries. The graphs reflect the percentage of CTR responses in each designation from the CTR responses N (56,161); and the percentage of responses in each designation from total survey responses N (61,628)

RESPONDENTS DEMOGRAPHICS

Race/ Ethnicity



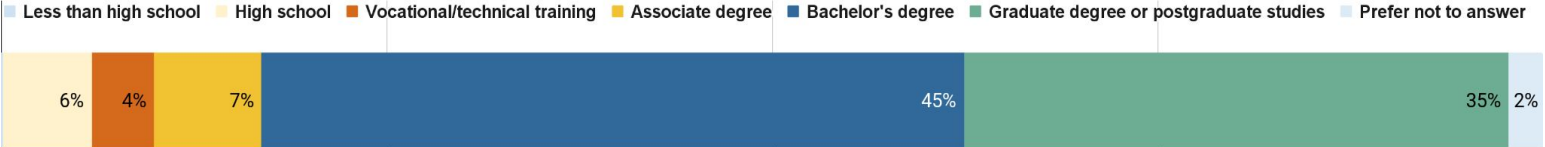
Gender Identity



Age Group



Education/ Degree



Household Income



25%

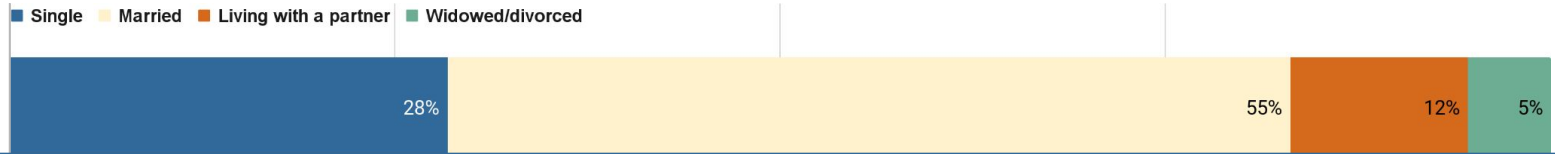
50%

75%

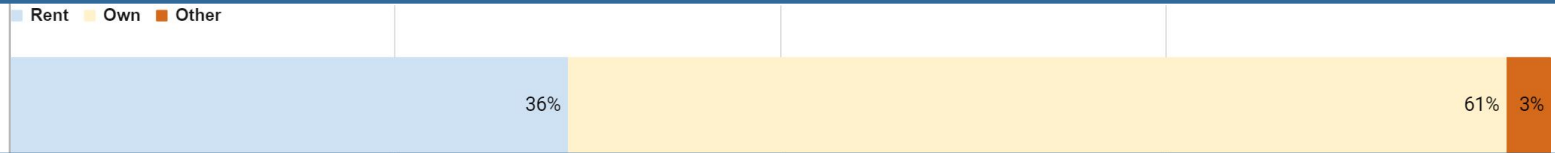
The graphs on this slide show the demographics of all survey respondents, regardless of their work location, or worksite type. Demographic questions are optional, hence sample size varies. N (race) = 50,925; N (gender) = 51,055; N (age) = 51,144; N (education) = 50,999; N (household income) = 51,005.

RESPONDENTS SOCIOECONOMICS

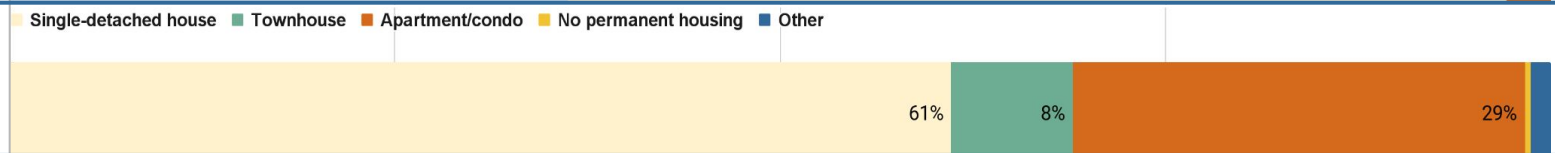
Marital Status



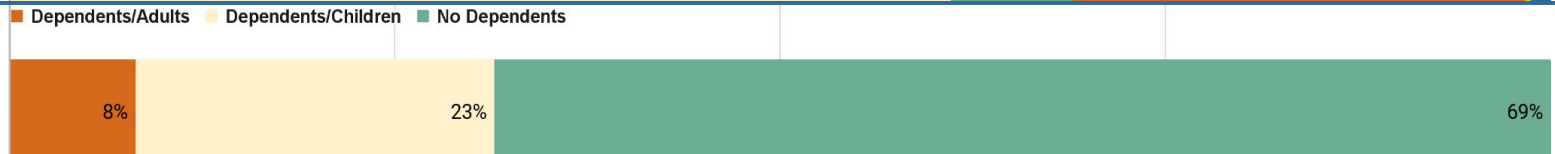
Home Ownership



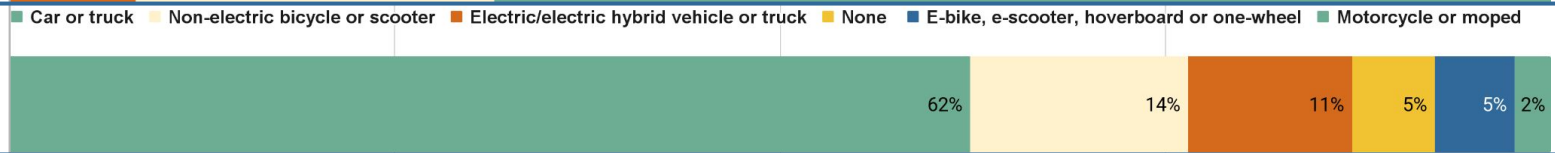
Housing Type



Children/ Dependents



Vehicle Type



The graphs on this slide show the demographics of all survey respondents, regardless of their work location, or worksite type. Socio-economic questions are optional, hence sample size varies. N (marital status) = 50,776; N (home ownership) = 50,599; N (housing type) = 50,599; N (dependents) = 50,737; N (Vehicle type) = 50,954.

SURVEY RESULTS



A

COMMUTE MODE

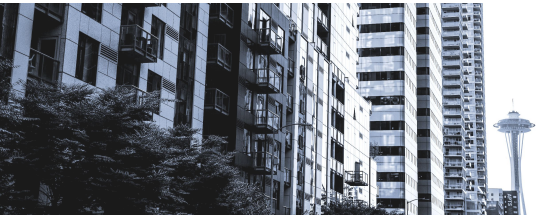
- Overview of Center City mode split
- Overview of CTR/non-CTR mode split
- Residential distribution by commute mode
- Commute mode by sociodemographics



B

WORK MODEL

- Overview of respondents work model
- Remote work patterns by weekday
- Residential distribution by work model
- Overview of remote work availability



C

WORK INDUSTRY

- Commute mode split for CTR-affected worksites by industry in Center City
- Commute mode split for CTR-affected worksites by industry city-wide (Seattle)

SURVEY RESULTS



D

NON-COMMUTE

- Overview of non-commute modes
- Non-commute travel mode by sociodemographic characteristics



E

MODE CHOICE

- Commute mode choice factors
- Reasons to drive alone to work
- Reasons not to drive alone to work



F

COVID-19 IMPACT

- Pre-pandemic and current primary commute mode split comparison
- Pandemic-related commute changes

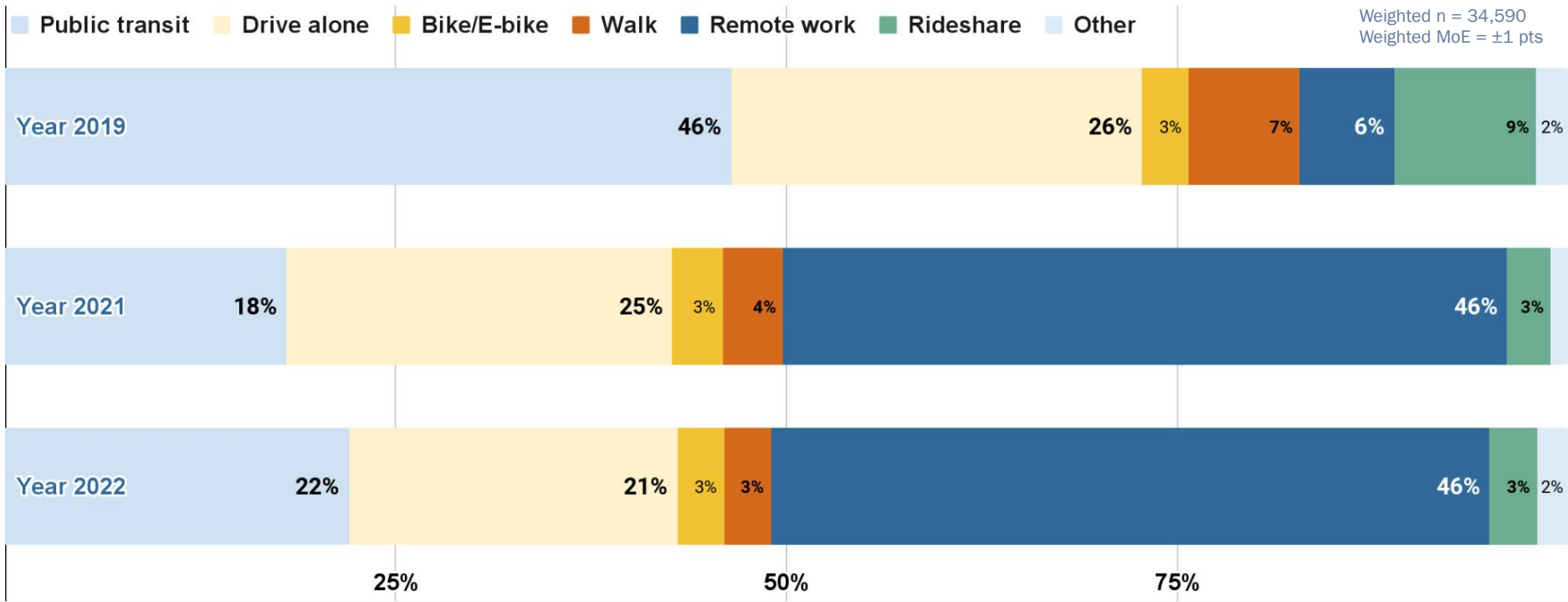


COMMUTE MODE

A Section

MODE SPLIT

CENTER CITY YEAR TO YEAR COMPARISON



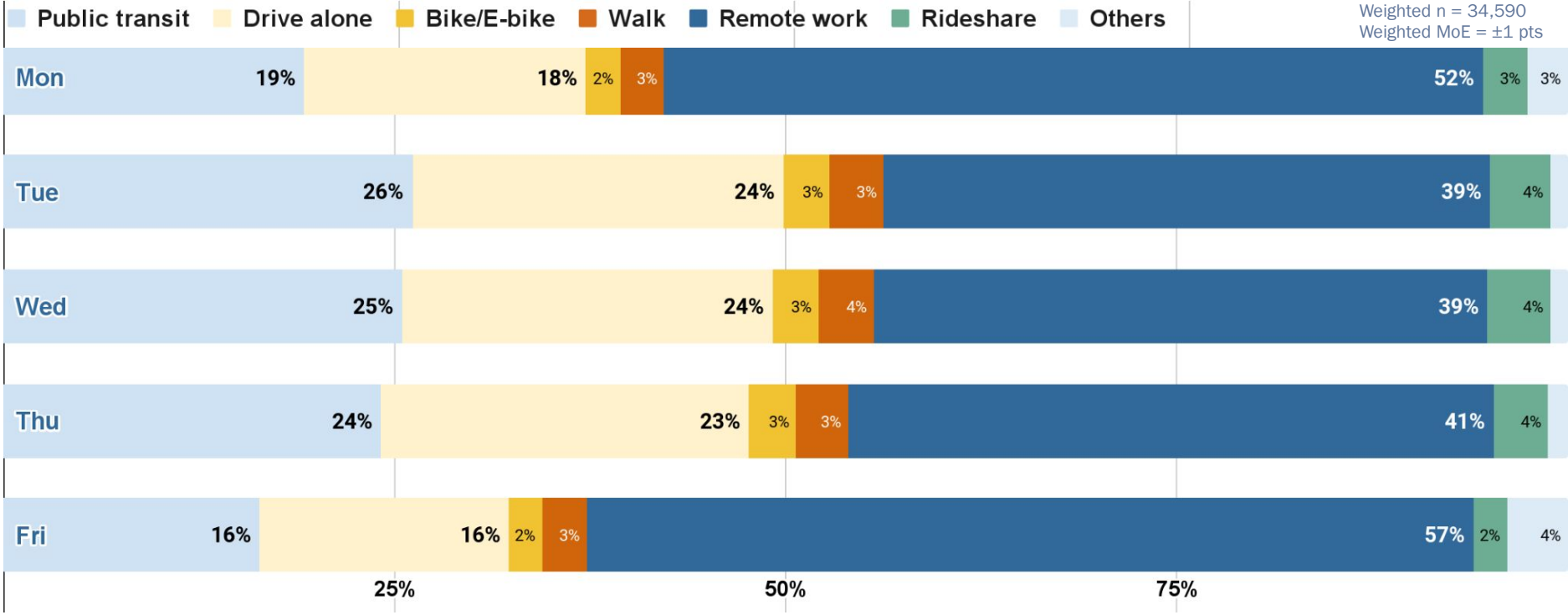
Q10: Currently, during a typical week, how do you get to work each day? (Monday, Tuesday, Wednesday, Thursday, Friday). Q8: When do you typically begin work? (only 6-9 am are included in the graphs). The graph shows the percentage of mode split aggregated for weekdays and excluding weekends, for respondents start working between 6-9 am inside central Seattle. N (2022) = 35,854 respondents. Public transit includes bus, light rail, and ferry; Drive alone includes taxi, Uber/Lyft and motorcycle; Rideshare includes vanpool, carpool and employer shuttle; Other includes day off.

** The mode split data is weighted based on the total number of CTR-affected and non-CTR-affected employees in Seattle Center City. Details on the weighted figures can be found in the appendix.

** Note : the 2021 & 2022 survey captured respondents' typical modes used each day, compared to 2019, which captured the modes used each day of the preceding week.

MODE SPLIT

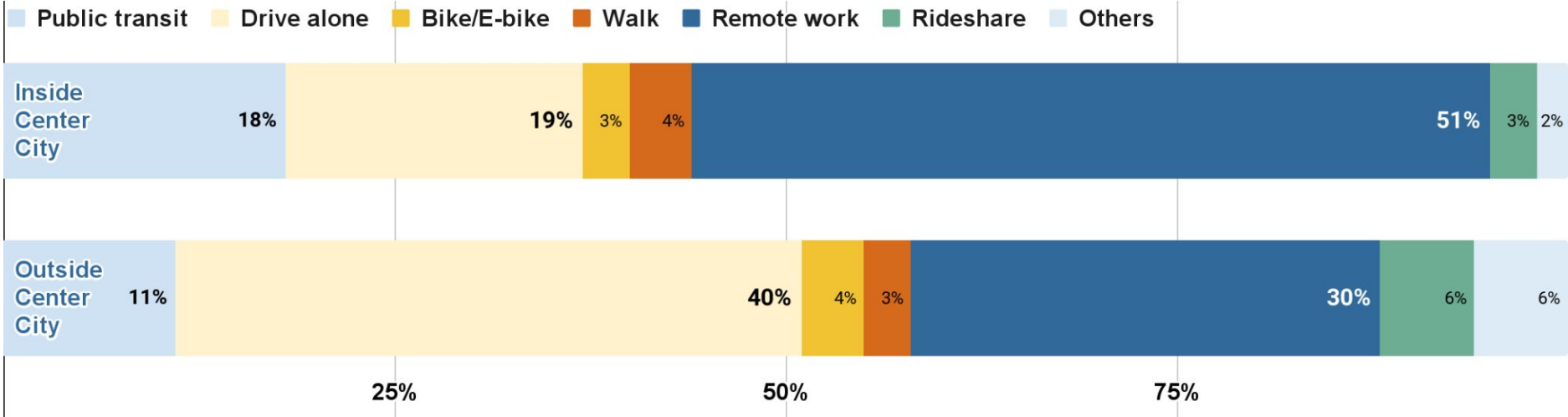
CENTER CITY BY WEEKDAY



Q10: Currently, during a typical week, how do you get to work each day? (Monday, Tuesday, Wednesday, Thursday, Friday). (only 6-9 am are included in the graphs).
 The graph shows the percentage of mode split for every day of the workweek, for respondents who work inside Center City for both CTR-affected and non-CTR-affected worksites.
 Sample: Unique respondents: N (Center City) = 34,642, Total trips: N (Center City) = 173,210.
 * The mode split data is weighted based on the total number of CTR-affected and non-CTR-affected employees in Seattle Center City. Details on the weighted figures can be found in the appendix.

MODE SPLIT

CTR-AFFECTED (INSIDE vs. OUTSIDE CENTER CITY)

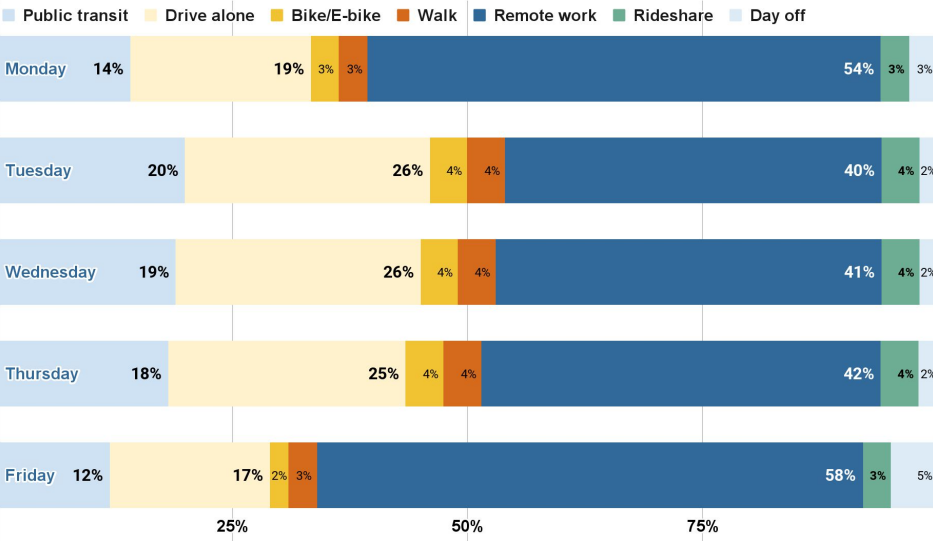


Q10: Currently, during a typical week, how do you get to work each day? (Monday, Tuesday, Wednesday, Thursday, Friday).
The graph shows the percentage of mode split aggregated for all weekdays, for respondents who work inside central Seattle. The graph shows a comparison between respondents who work inside Center City, and Center City mode split aggregated for all weekdays.
Sample: Unique respondents: N (Center City) = 43,441 , N (outside Center City) = 12,524. Total trips: N (Center City) = 217,205 , N (outside Center City) = 53,565.

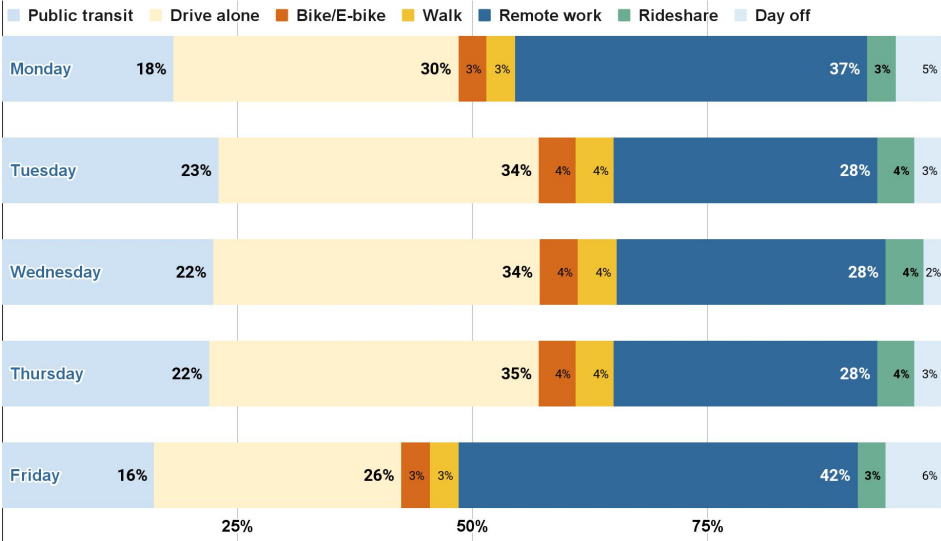
MODE SPLIT

CTR/NON-CTR COMPARISON

CTR WORKSITES

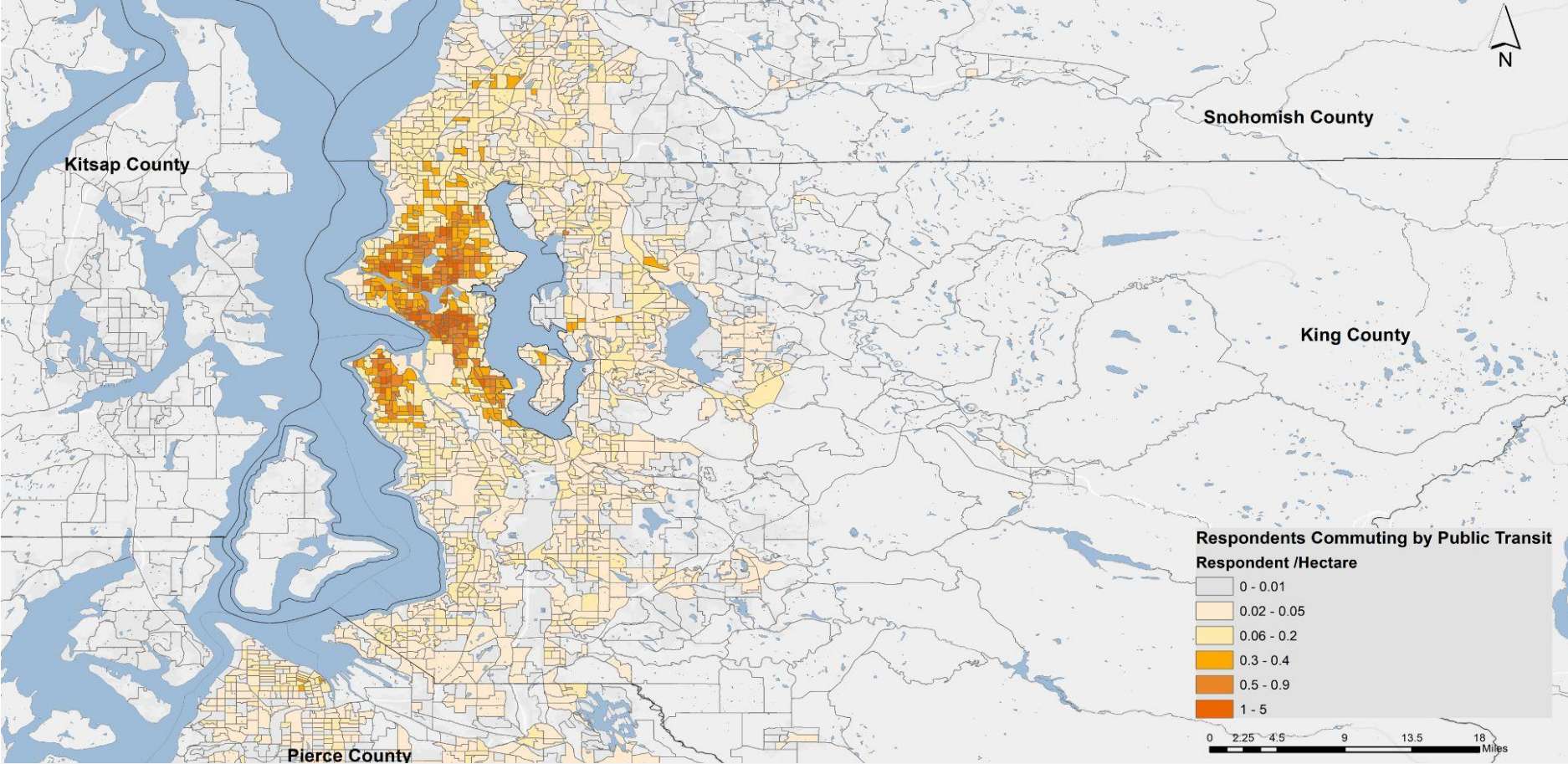


NON-CTR WORKSITES



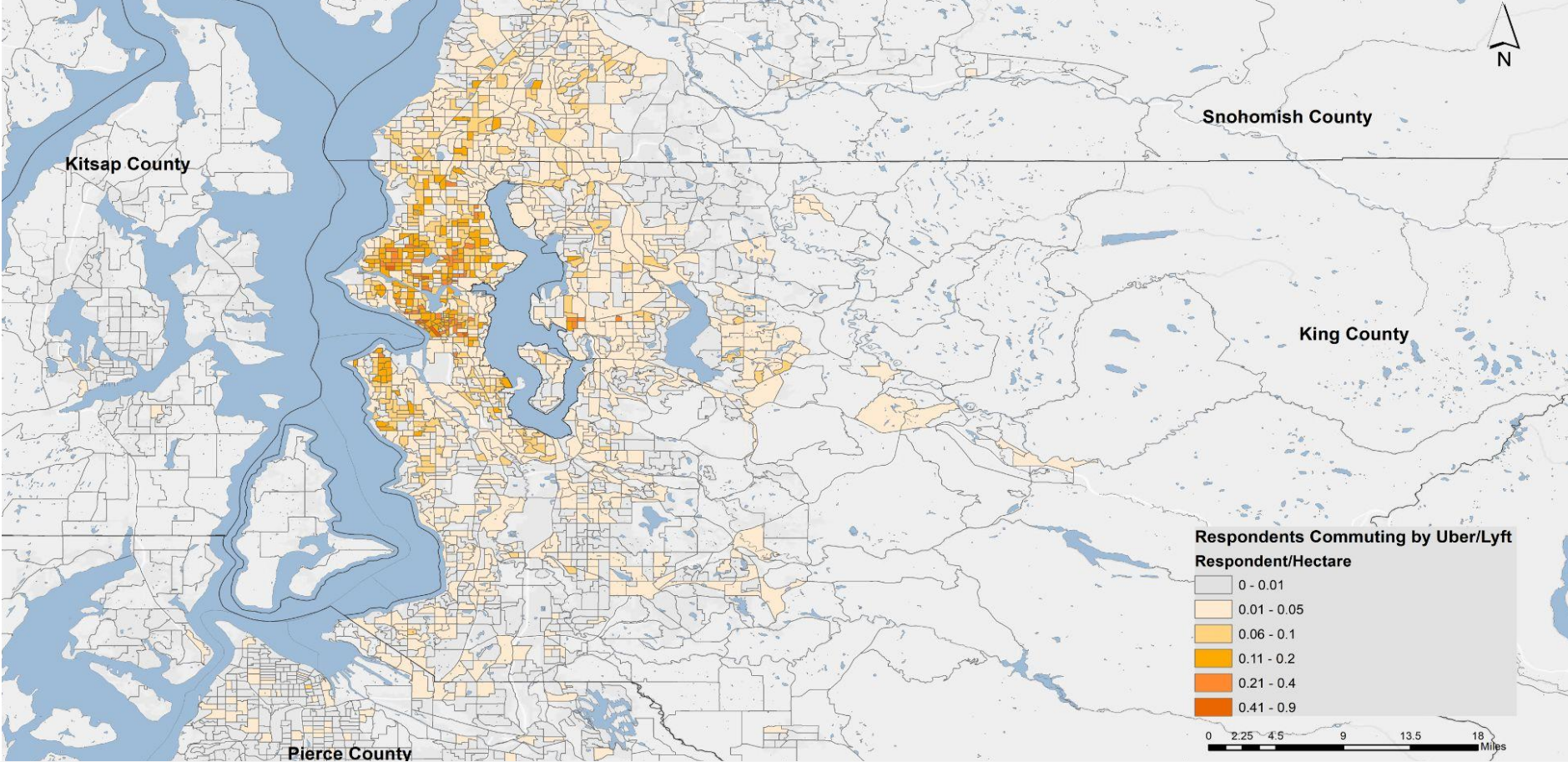
Q10: Currently, during a typical week, how do you get to work each day? (Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Sunday)
 The graph shows the percentage of mode split aggregated for all weekdays, for respondents who work with CTR-affected worksites (N = 55,965), and non-CTR-affected worksites (N = 5,630)

PUBLIC TRANSIT COMMUTERS HOME DISTRIBUTION



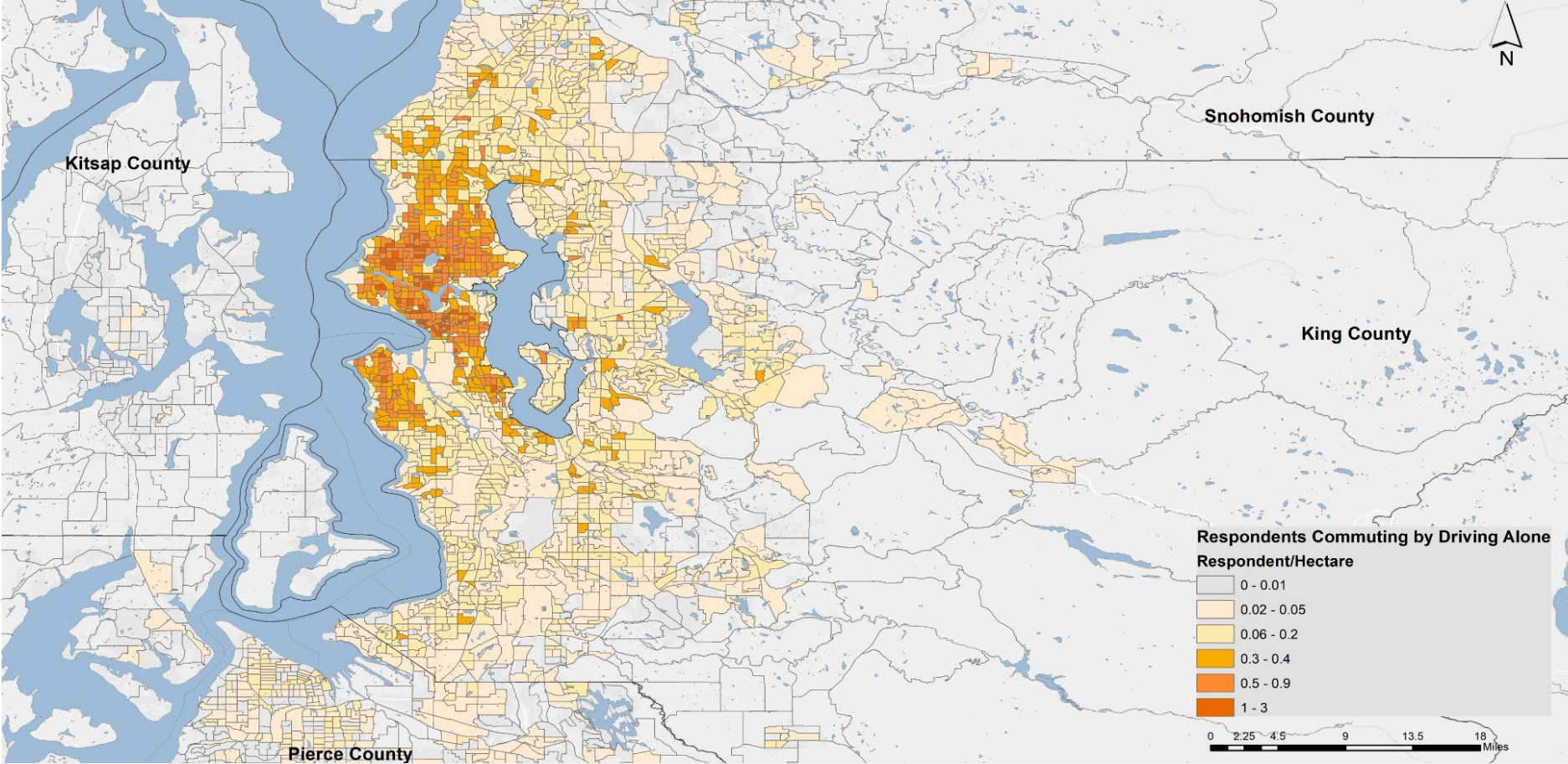
These maps reflect the total number of survey respondents homes who commute using public transport once or more per week. Numbers are normalized by census block group area.

UBER/LYFT COMMUTERS HOME DISTRIBUTION



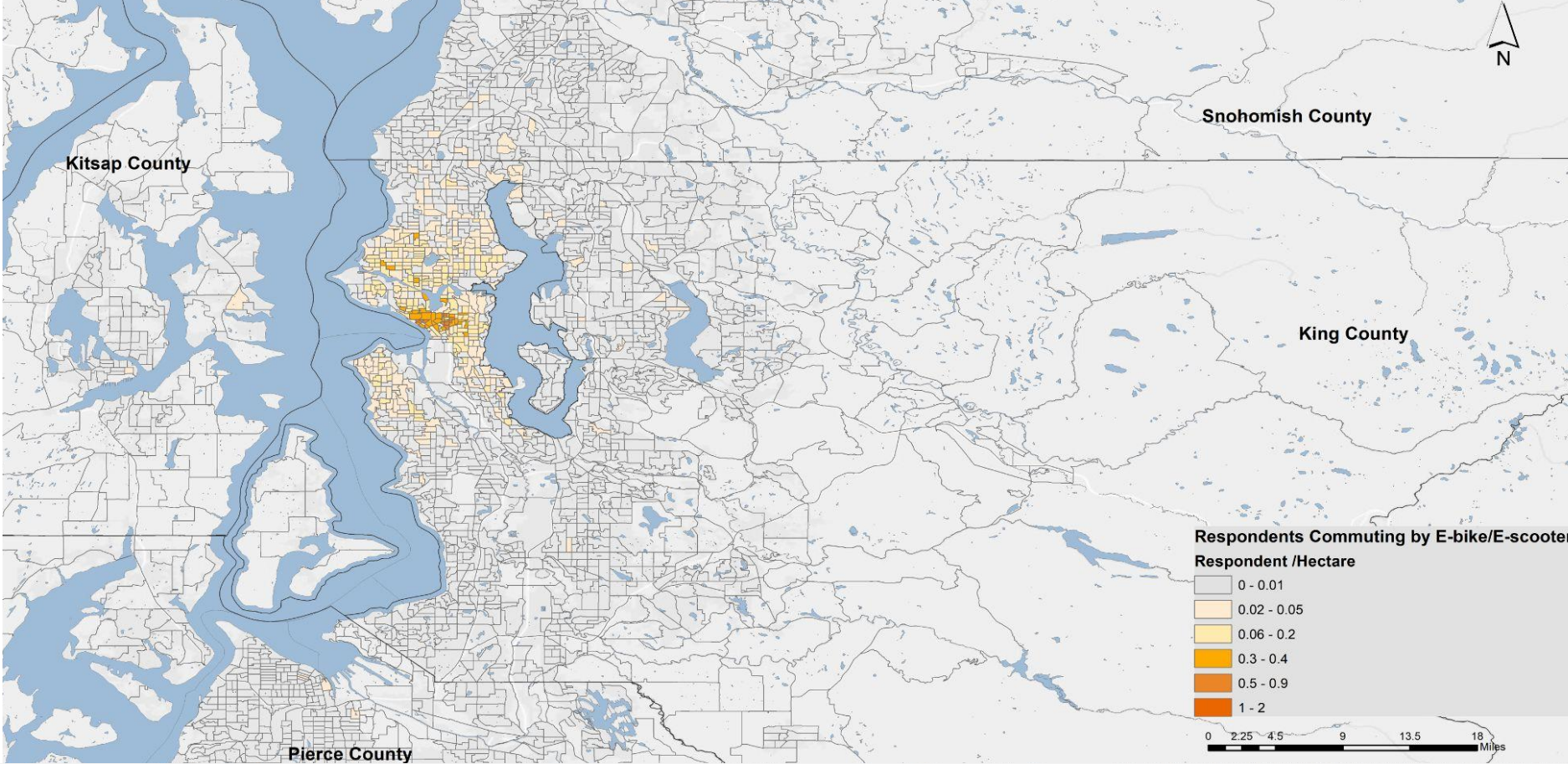
These maps reflect the total number of survey respondents homes who commute using Uber/Lyft once or more per week. Numbers are normalized by census block group area.

DRIVE-ALONE COMMUTERS HOME DISTRIBUTION



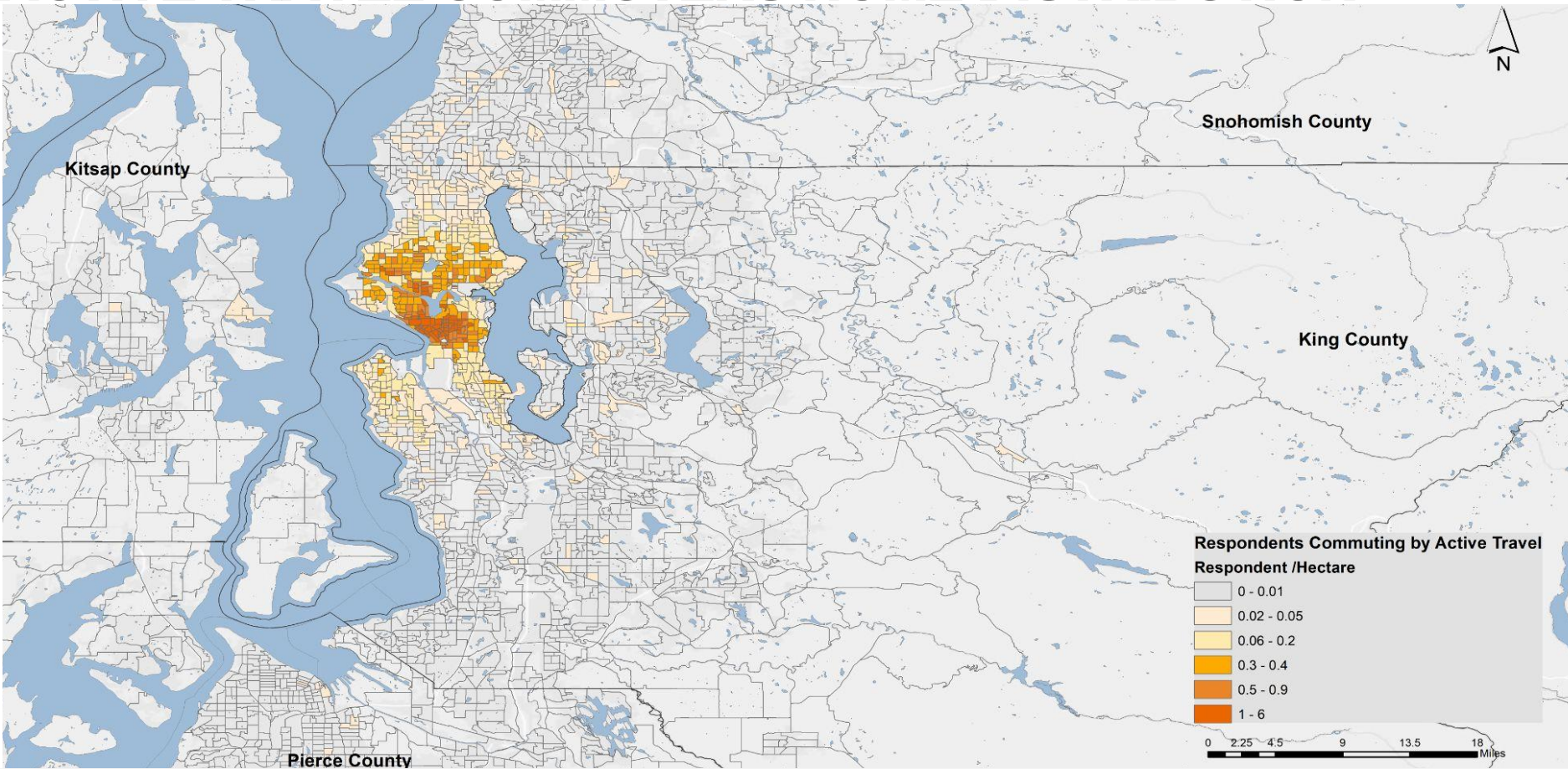
These maps reflect the total number of survey respondents homes who commute by driving alone once or more per week. Numbers are normalized by census block group area.

E-BIKE/E-SCOOTER COMMUTERS HOME DISTRIBUTION



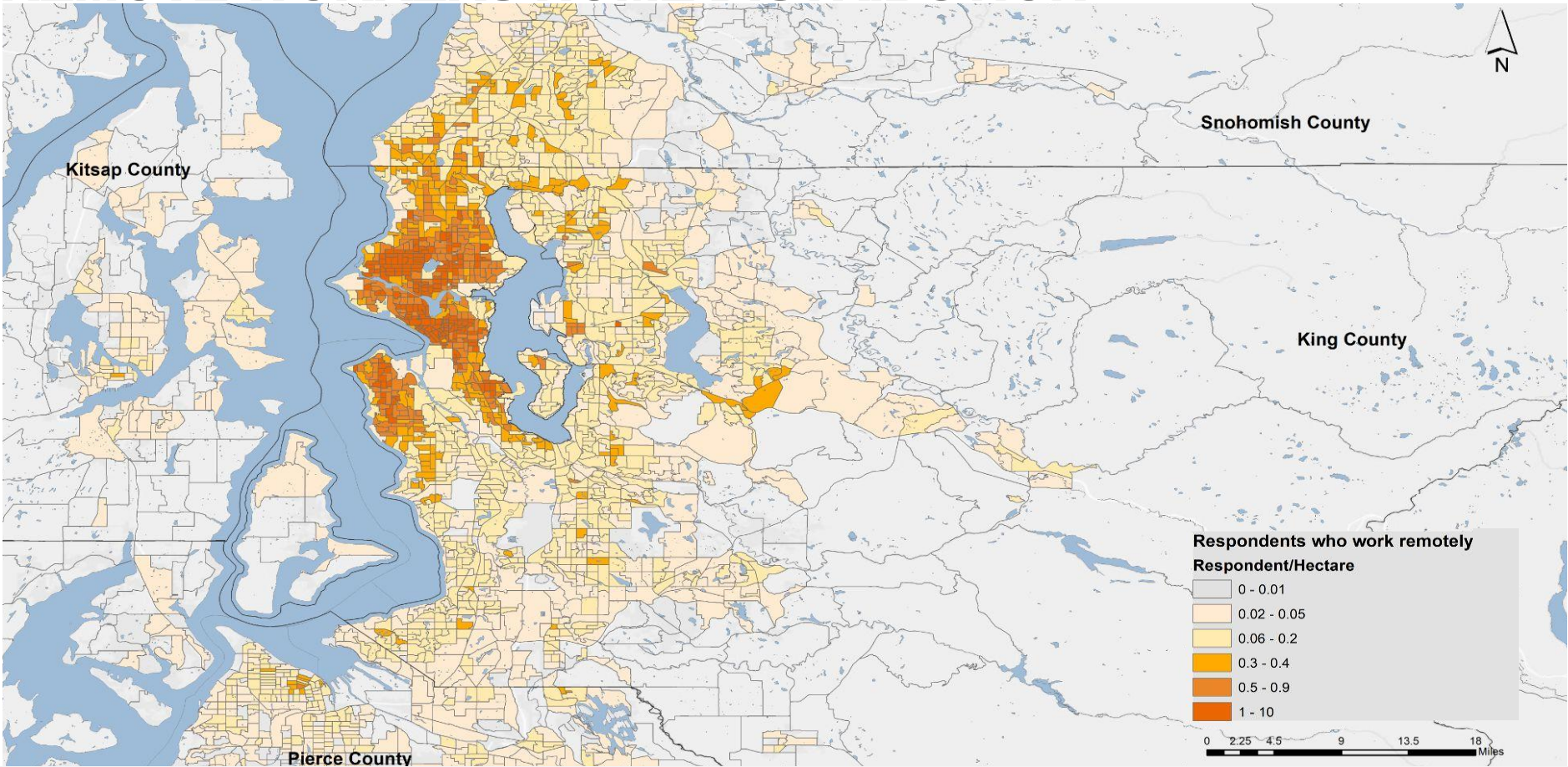
These maps reflect the total number of survey respondents homes who commute using e-bike/e-scooter once or more per week. Numbers are normalized by census block group area. 25

ACTIVE TRAVEL COMMUTERS HOME DISTRIBUTION



These maps reflect the total number of survey respondents homes who commute using active travel modes once or more per week. Numbers are normalized by census block group area.

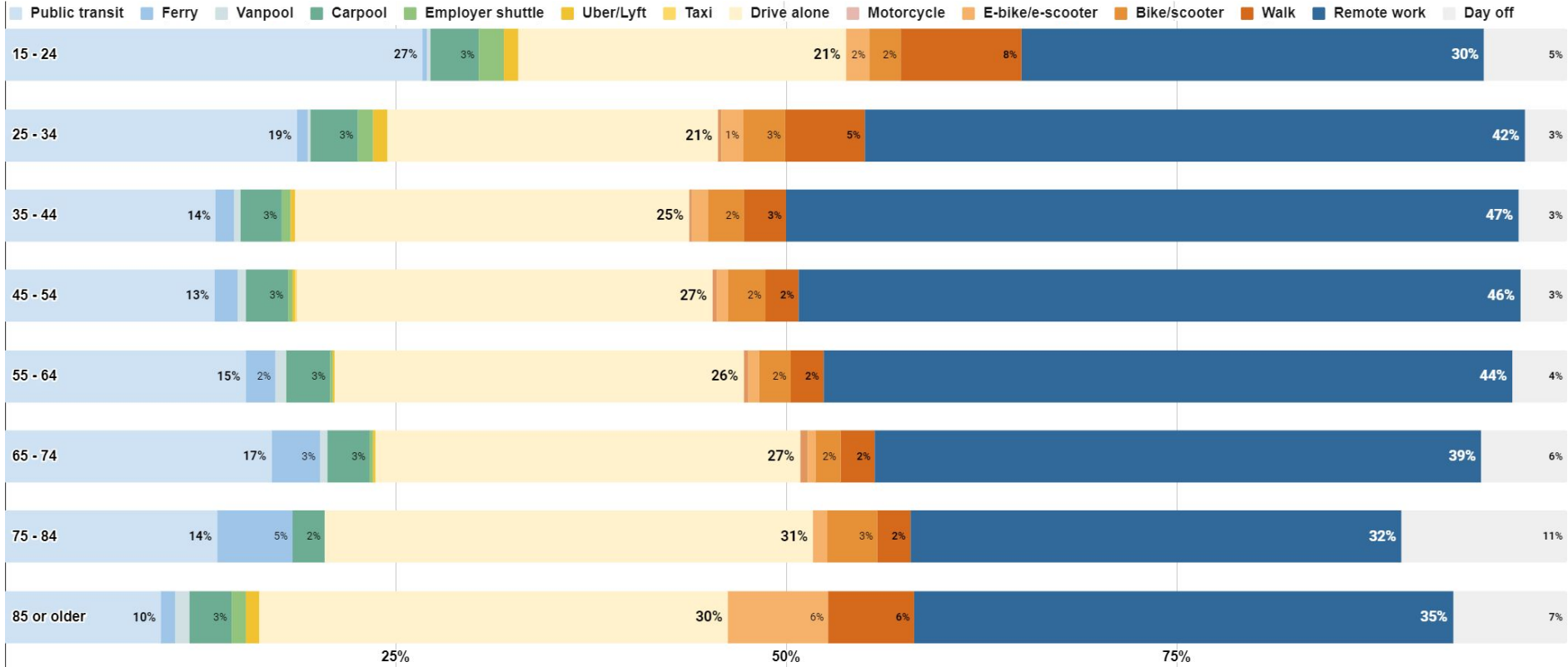
REMOTE WORKERS HOME DISTRIBUTION



These maps reflect the total number of survey respondents homes who work remotely once or more per week. Numbers are normalized by census block group area.

MODE SPLIT

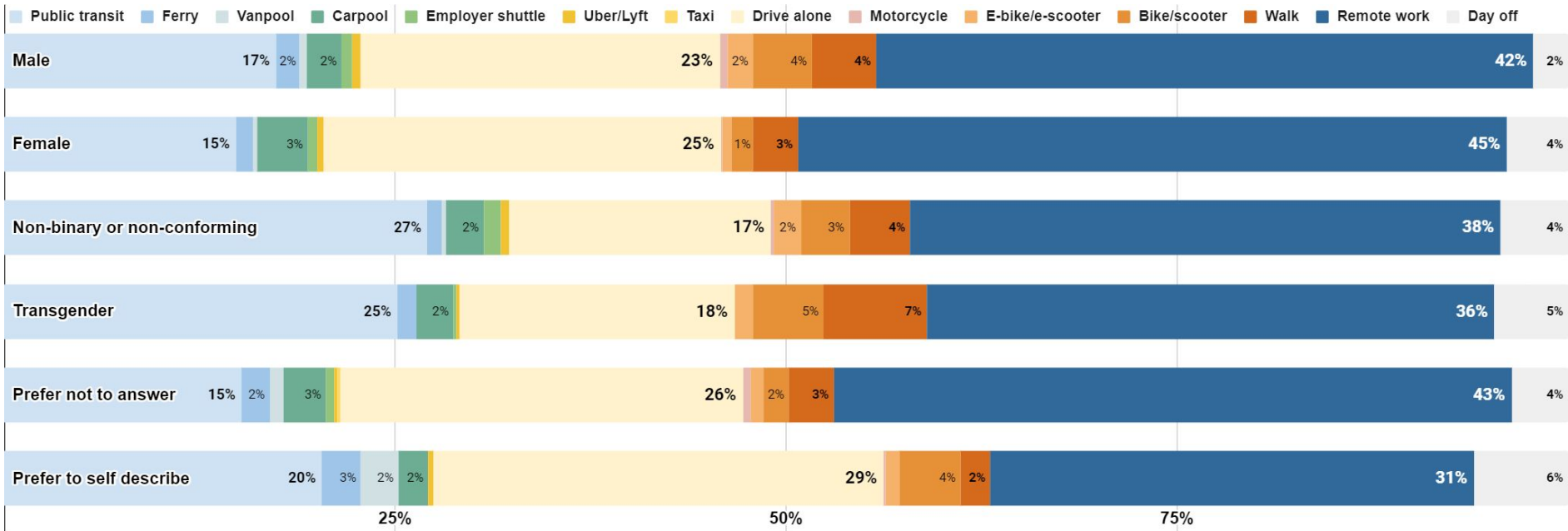
BY AGE GROUP



Q10: Currently, during a typical week, how do you get to work each day? Q18: What is your age?
 The graph shows the percentage of mode split aggregated for all weekdays, for all respondents. N = 50,062 respondents.

MODE SPLIT

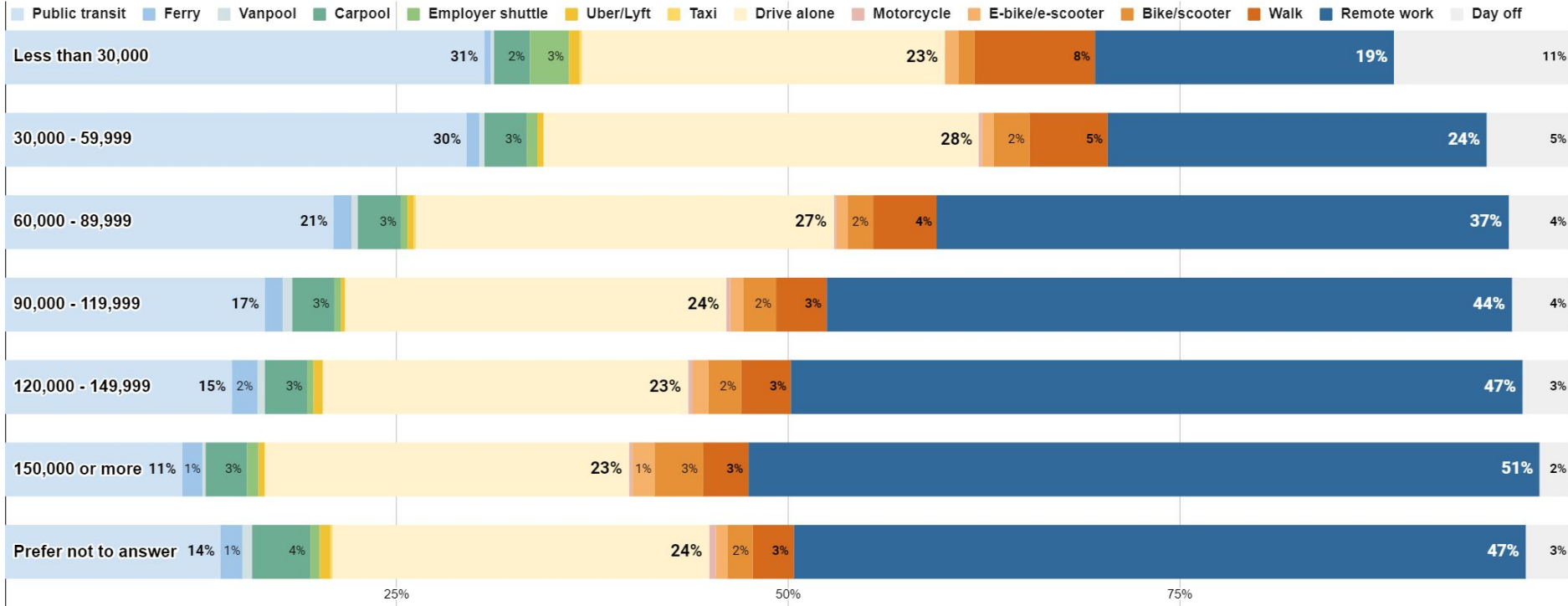
BY GENDER



Q10: Currently, during a typical week, how do you get to work each day? Q19: Do you identify as...? The graph shows the percentage of mode split aggregated for all weekdays, for all respondents who belong to every age group. N = 49,917 respondents.

MODE SPLIT

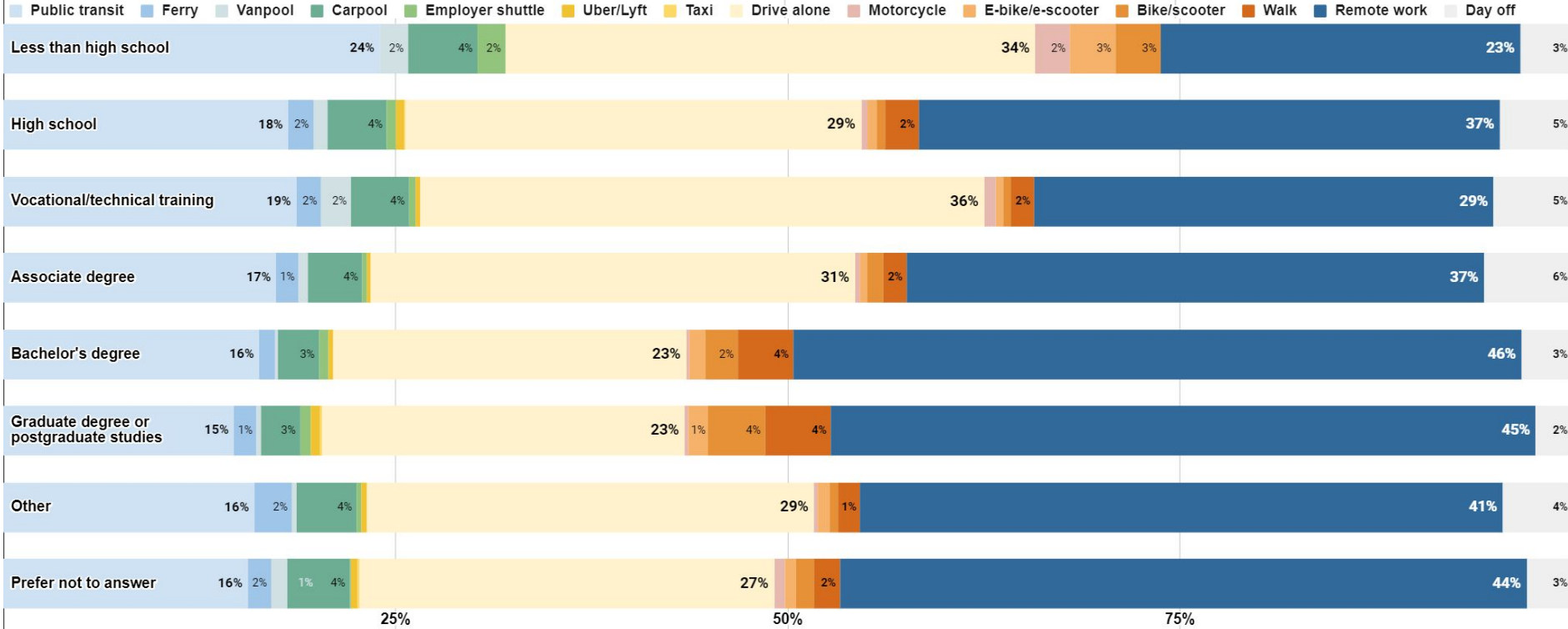
BY HOUSEHOLD INCOME



Q10: Currently, during a typical week, how do you get to work each day? Q20: Which of the following best describes your household income last year? The graph shows the percentage of mode split aggregated for all weekdays, for all respondents. N = 49,125 respondents.

MODE SPLIT

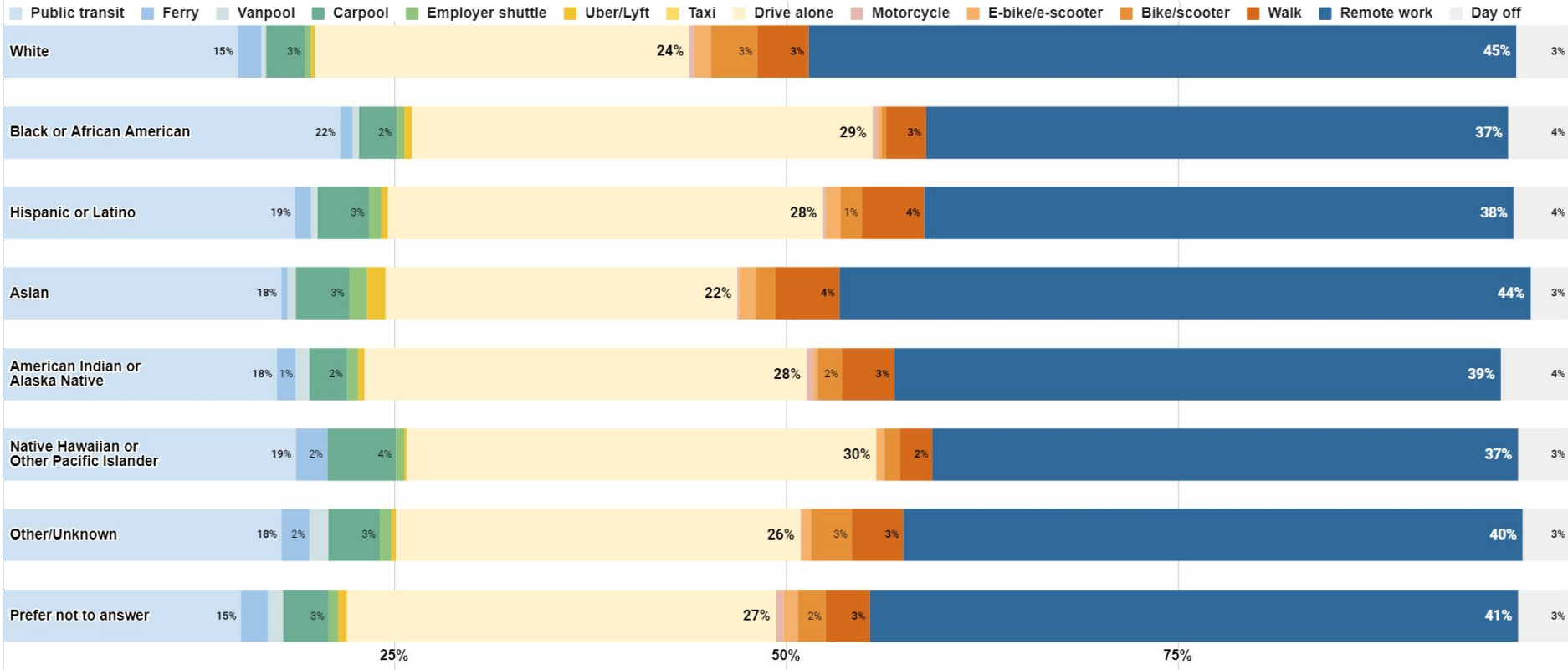
BY EDUCATION



Q10: Currently, during a typical week, how do you get to work each day? Q21: What is the highest degree or level of education you have completed? The graph shows the percentage of mode split aggregated for all weekdays, for all respondents who belong to every age group. N = 49,805 respondents.

MODE SPLIT

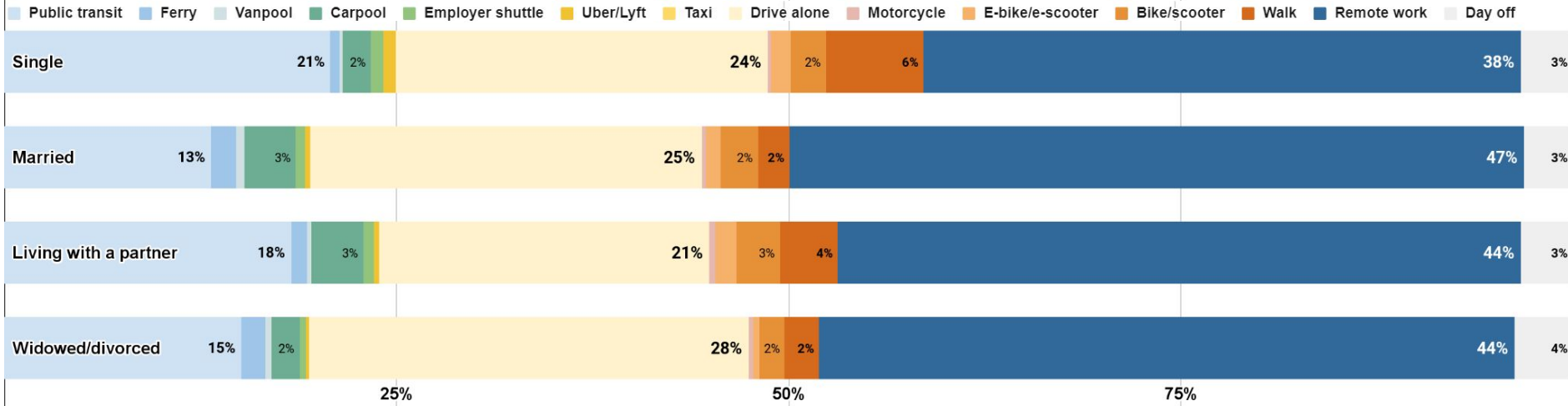
BY RACE/ETHNICITY



Q10: Currently, during a typical week, how do you get to work each day? Q22: Please specify your race/ethnicity
 The graph shows the percentage of mode split aggregated for all weekdays, for all respondents. N = 51,060 respondents.

MODE SPLIT

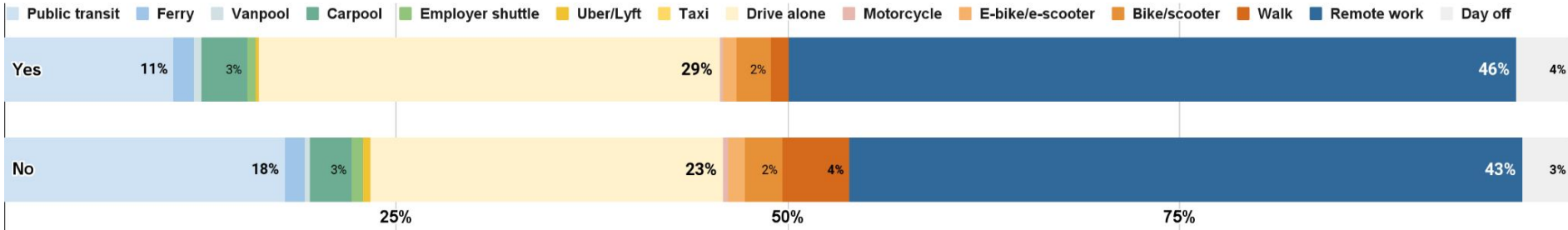
BY MARITAL STATUS



Q10: Currently, during a typical week, how do you get to work each day? Q27: What is your marital status?
 The graph shows the percentage of mode split aggregated for all weekdays, for all respondents. N = 51,060 respondents.

MODE SPLIT

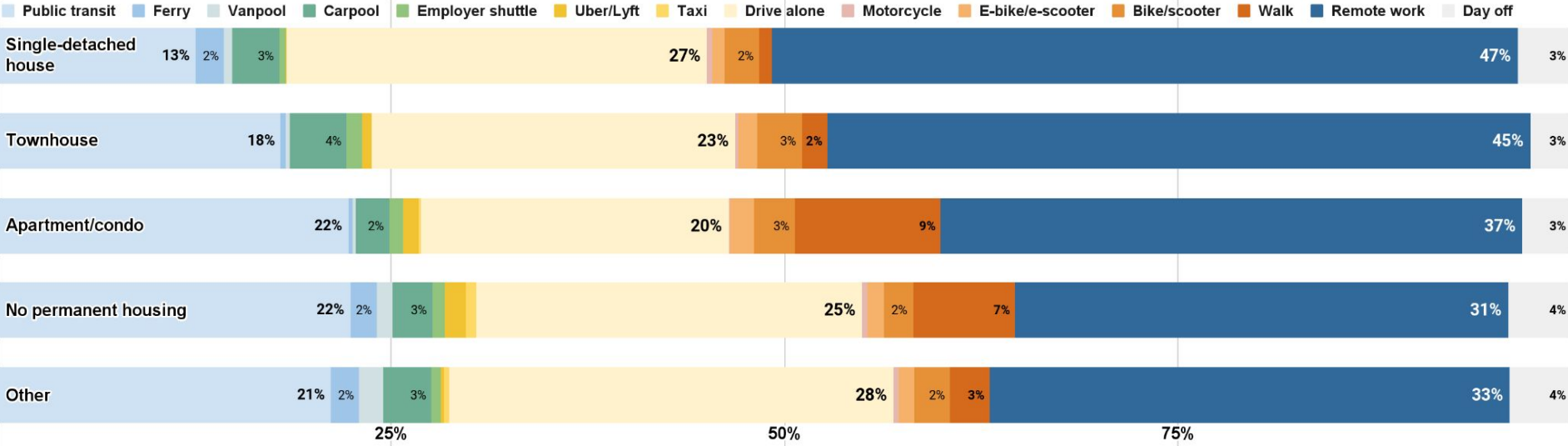
BY HAVING DEPENDENTS



Q10: Currently, during a typical week, how do you get to work each day? Q28: Do you have children under 18 or adults living in your household who need assistance for transportation? The graph shows the percentage of mode split aggregated for all weekdays, for all respondents. N = 49,604 respondents.

MODE SPLIT

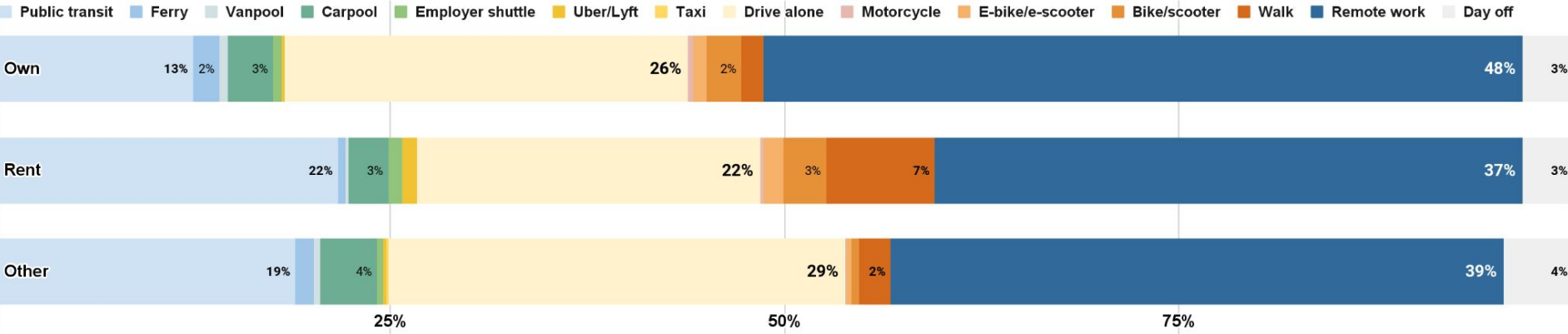
BY HOUSING TYPE



Q10: Currently, during a typical week, how do you get to work each day? Q30: What type of housing do you currently live in?
 The graph shows the percentage of mode split aggregated for all weekdays, for all respondents. N = 50,542 respondents.

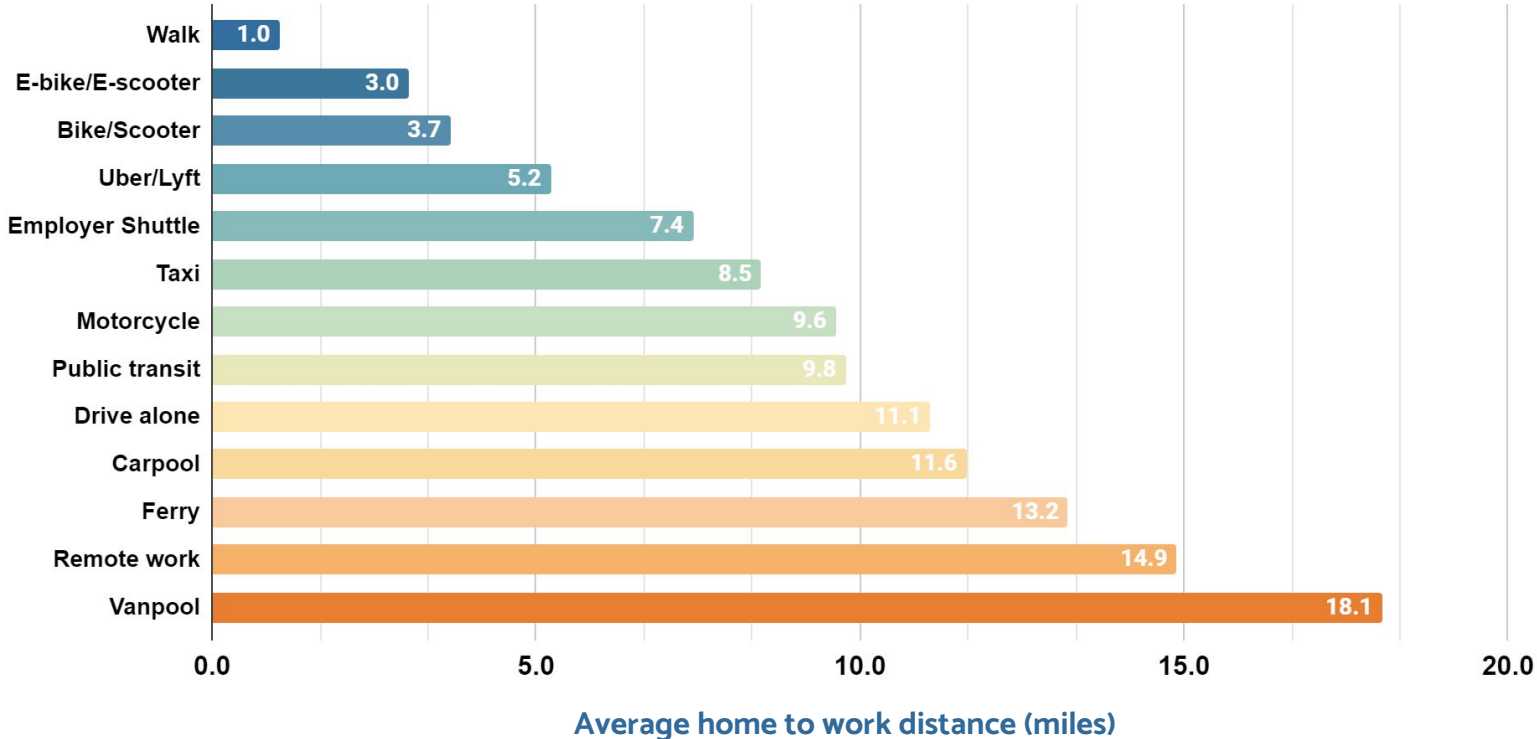
MODE SPLIT

BY HOUSING OWNERSHIP



Q10: Currently, during a typical week, how do you get to work each day? Q31: Do you own or rent your current residence? The graph shows the percentage of mode split aggregated for all weekdays, for all respondents. N = 50,542 respondents.

AVERAGE HOME TO WORK DISTANCE BY COMMUTE MODE



Q2: Please enter the full address of your worksite. Q46: If you could, please point out the nearest intersection to your home (this question is optional)
This graph shows the average home to work distance in miles for every mode, as calculated from reported home and work locations. N=45,775

SECTION A

SUMMARY

The COVID-19 pandemic has significantly increased the adoption of remote work, causing continued notable changes to Seattle commute mode in 2022.

Center City commute mode changes:

- **Remote work** has remained comparable to pandemic levels (2021) and over seven times higher than pre-pandemic levels (2019), making up **46%** of overall peak hours commute and reaching up to over **50%** on Mondays and Fridays.
- The overall share of **driving alone** to work in the Center City has decreased from **26%** pre-pandemic (2019) and **25%** pandemic (2021) to **21%** in 2022.
- **Public transit** usage saw the most significant decline in mode share from pre-pandemic levels (2019) but gradually recovered, increasing from **18%** in 2021 to **22%** in 2022.
- **Rideshare** saw the largest relative percentage decline between 2019 and 2021 and remained unchanged in 2022.
- Although active travel modes, including **bike/e-bike**, remained unchanged, **walking** has decreased from over **7%** pre-pandemic (2019) and **4%** pandemic (2021) to **3%** in 2022.

SECTION A

SUMMARY

City-wide CTR-affected mode split:

- Adopting **remote work** in CTR-affected worksites inside the **Center City** is **70%** higher than in CTR-affected worksites **outside the city center**, making up **50%** of the mode share for CTR worksites inside the Center City, and **30%** for CTR worksites outside the Center City.
- **Driving alone** to CTR-affected worksites is over **two times** higher **outside the Center City** than inside the Center City, making up **19%** of the mode share for CTR worksites inside the Center City, and **40%** for CTR worksites outside the Center City.
- **Public transit** usage is **60%** higher among employees working for **CTR-affected** worksites inside the Center City than those outside the Center City, making up **18%** of the mode share for CTR worksites inside the Center City, and **11%** for CTR worksites outside the Center City.
- **Rideshare** is **two times** higher for CTR-affected worksites outside Center City than those inside the Center City, making up **6%** of the **outside Center City** mode share and **3%** of the **Center City** mode share.
- **Active travel** modes are comparable for CTR-affected worksites inside and outside the Center City, making up around **3%** of the total mode share.

SECTION A

SUMMARY

City-wide Non-CTR-affected mode split:

- The adoption of **remote work** in non-CTR-affected worksites is **30%** lower than in CTR-affected worksites inside Seattle (city-wide).
- **Driving alone** to non-CTR-affected worksites is **50%** higher than CTR-affected worksites inside Seattle (city-wide).
- **Transit** usage is **20%** higher among non-CTR-affected employees than CTR-affected worksites inside Seattle (city-wide).
- **Rideshare** and **active travel** modes are comparable for both CTR-affected and non-CTR-affected.

Spatial distribution of commuters' home locations:

- **Remote workers** are relatively concentrated in Seattle, especially downtown, central, northwest, and northeast Seattle areas. For respondents working in Seattle, relatively lower concentrations of remote workers are seen in other areas including Bellevue, Mountlake Terrace, and Sammamish.
- Most commuters who use **transit** or **drive alone** live in transit-accessible areas in Seattle including downtown, central and northwest, northeast, and West Seattle areas. Fewer transit users can be found in areas of North Seattle and outside the city.
- **Active travel commuters** are highly concentrated in the Center City, and neighborhoods nearby.

SECTION A

SUMMARY

Commute mode and sociodemographics:

- **Remote work** is adopted the most by higher-income and higher-educated employees, and is least adopted by younger (15-24) and older (65 and more) employees. The levels of remote work adoption are also higher among employees living in owned single-detached houses.
- Employees who continue to rely on **public transit** are more likely to be non-white, lower-income, and younger-aged (15-34). Transit users are also likely to be single, without dependents, and live in rented apartments/condos in urban areas.
- Young employees (15-34) are less likely to **drive alone** to work. In contrast, employees who drive alone to work tend to live in owned single-detached houses with dependents.
- Employees who are young (25-34), Asians, and living individually in rented apartments/condos are more likely to use **Uber/Lyft**.
- **Walking** is used the most by young employees (15-24) who live individually in rented apartments or condos in urban areas.
- Other active modes such as **bike/e-bike** are more likely to be used for commute by white employees. Males, in comparison to females, are more likely to bike/e-bike to work.

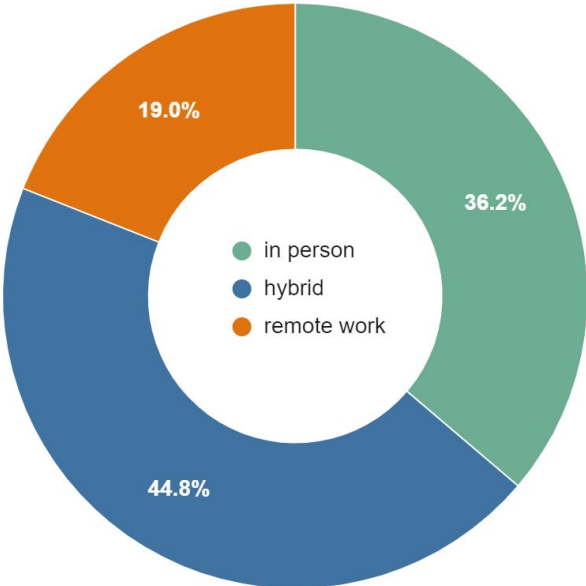


WORK MODEL

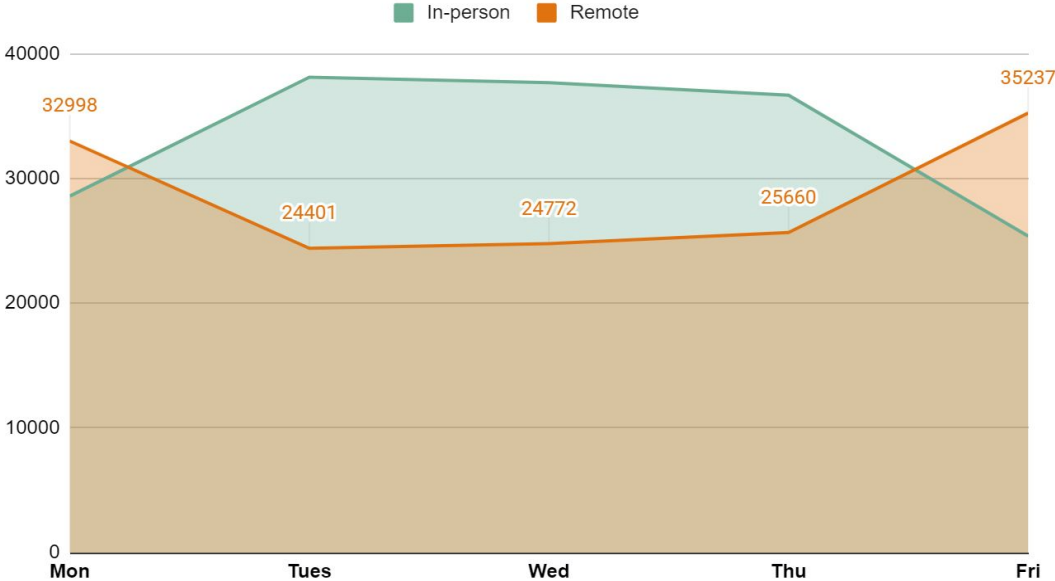
B Section

WORK MODEL

DAY TO DAY COMPARISON



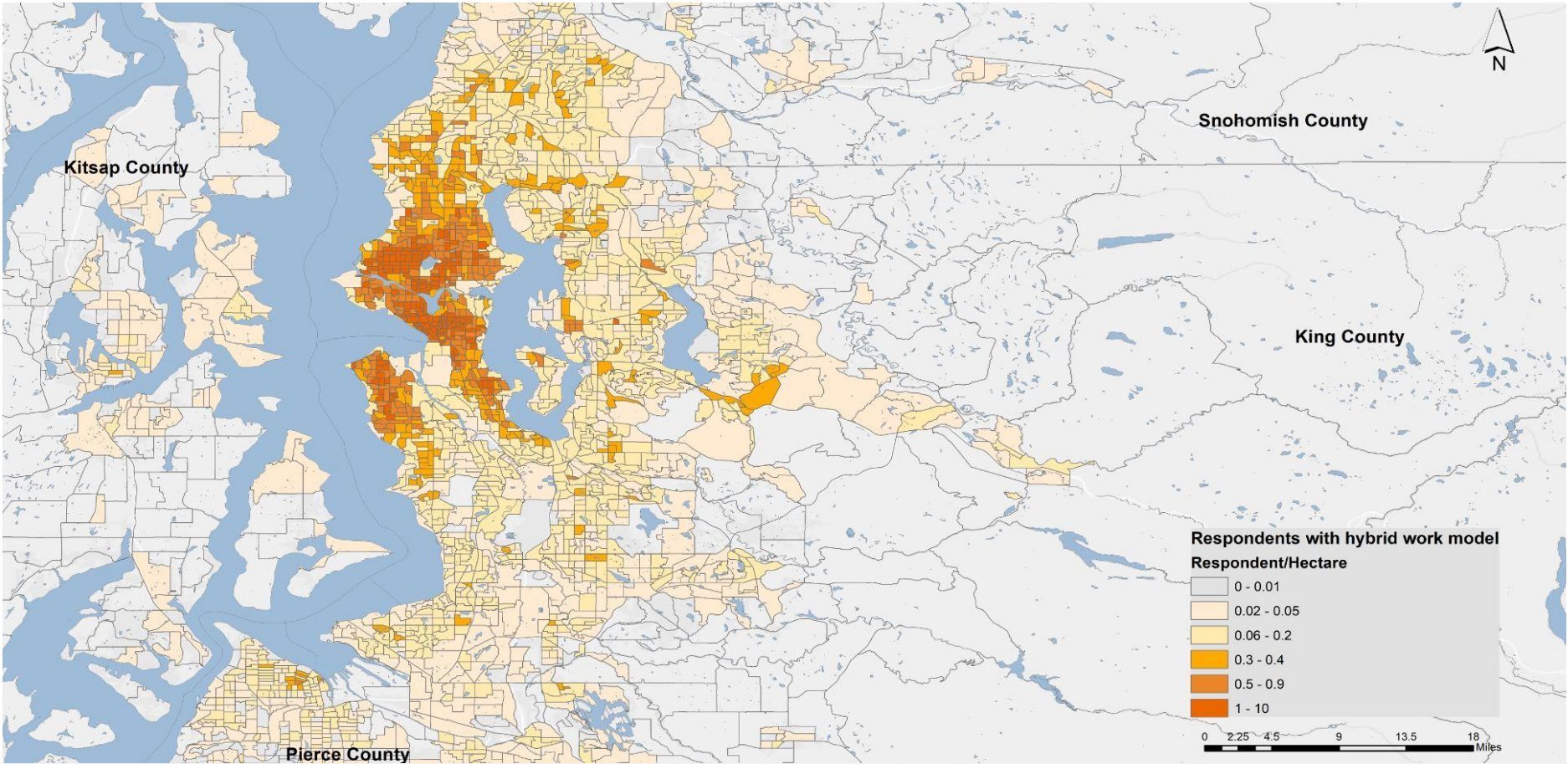
Respondents Adoption of Telework Split



Number of Weekday Commute Trips (Physical Commute vs. Remote)

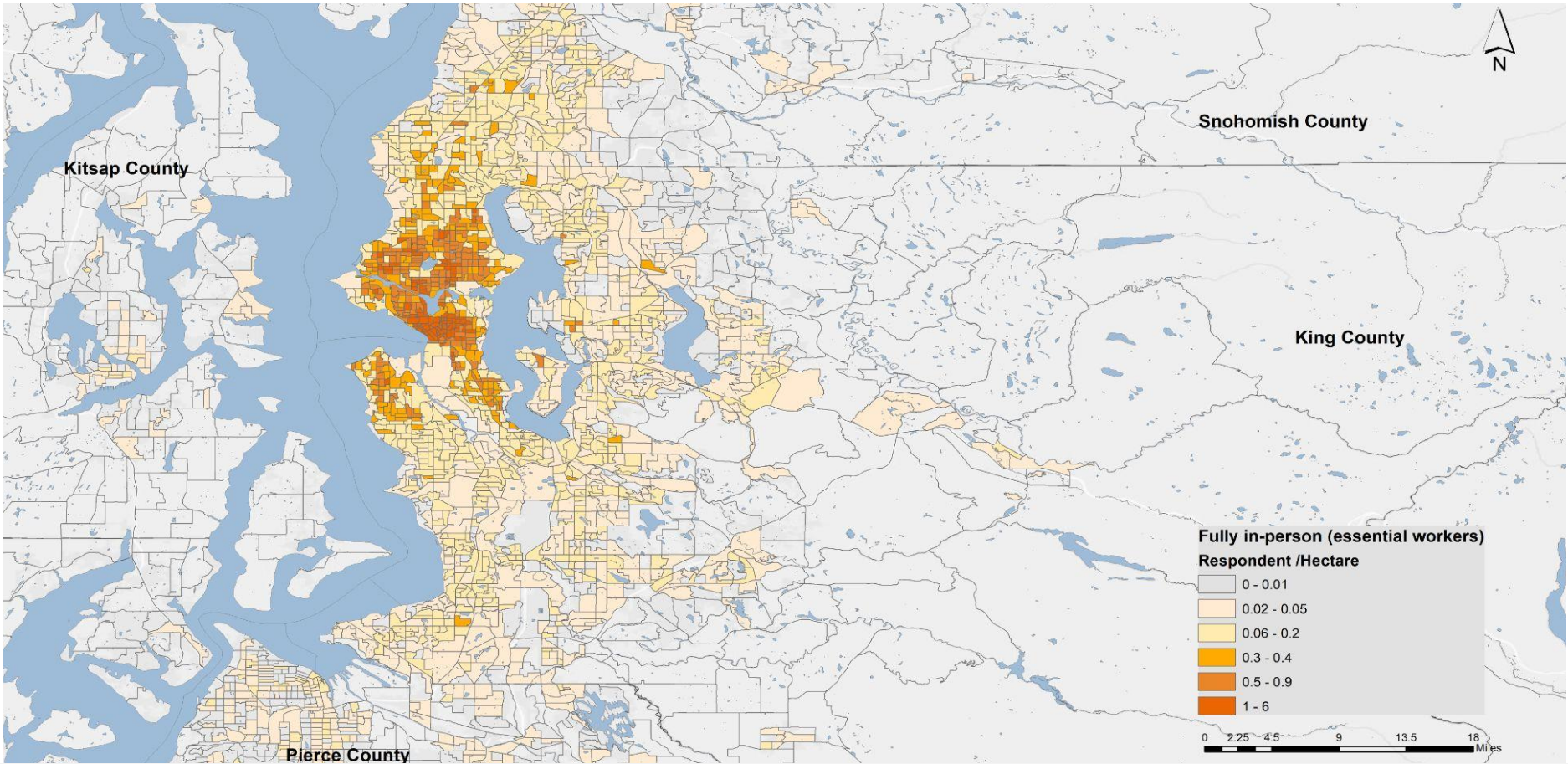
Q10: Currently, during a typical week, how do you get to work each day?
 Remote = commute 5 days/week remotely. In-person = commute 5 days/week physically. Hybrid = commute one to four days of the week remotely

HYBRID REMOTE WORKERS HOME DISTRIBUTION



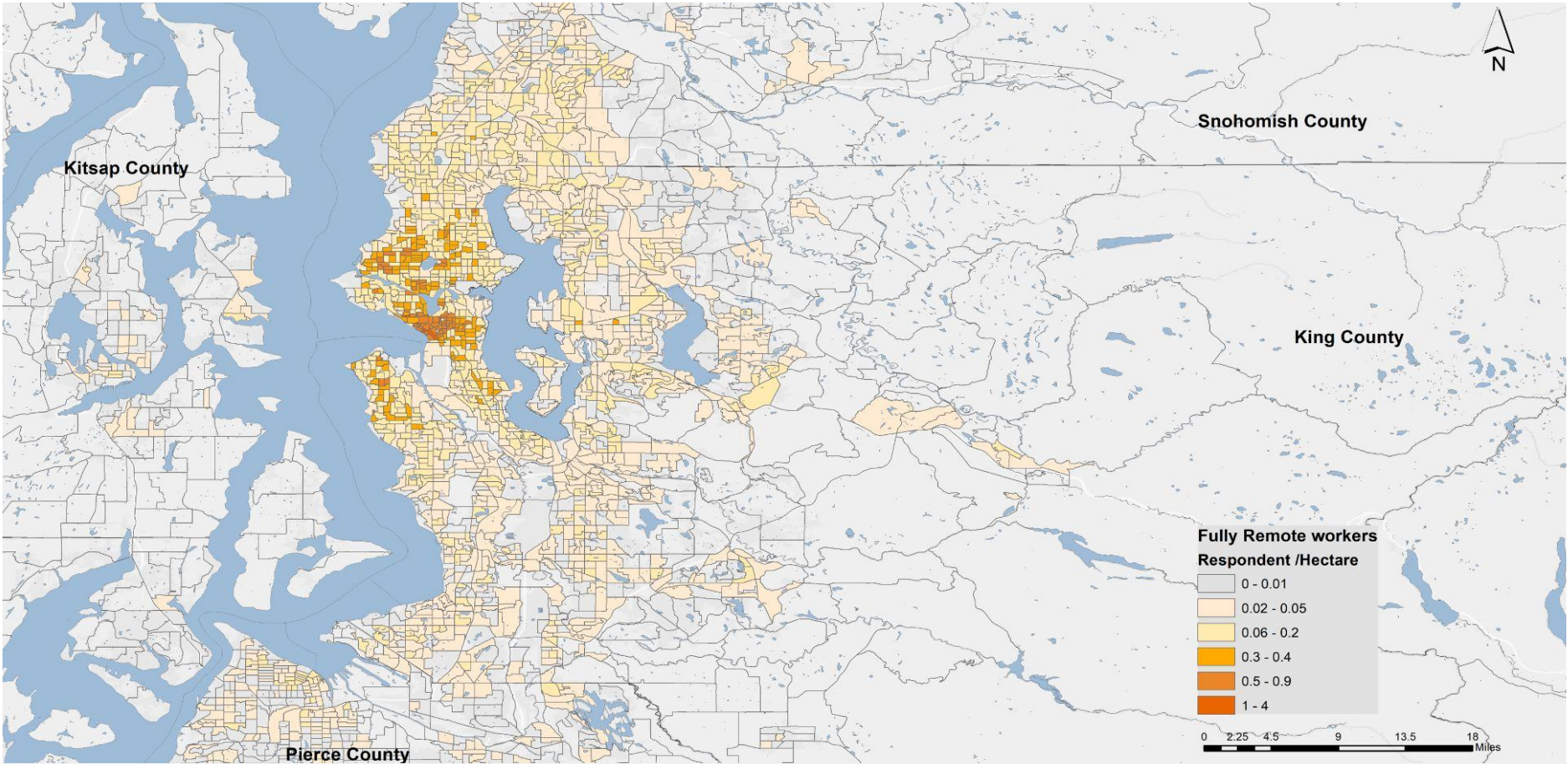
These maps reflect the total number of survey respondents homes who work remotely one to three days per week. The number of respondents is normalized by census block group area.

FULLY IN-PERSON WORKERS HOME DISTRIBUTION



These maps reflect the total number of survey respondents homes who work in-person five days per week. The number of respondents is normalized by census block group area.

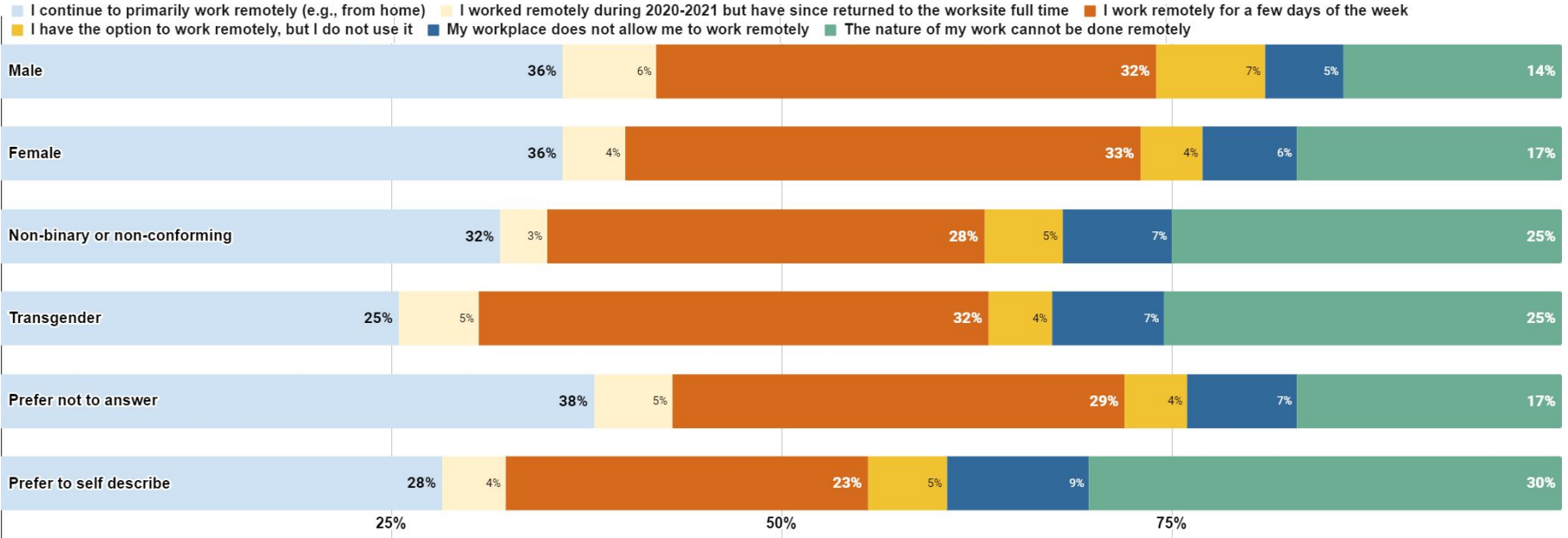
FULLY REMOTE WORKERS HOME DISTRIBUTION



These maps reflect the total number of survey respondents homes who work remotely more than three days per week. The number of respondents is normalized by census block group area.

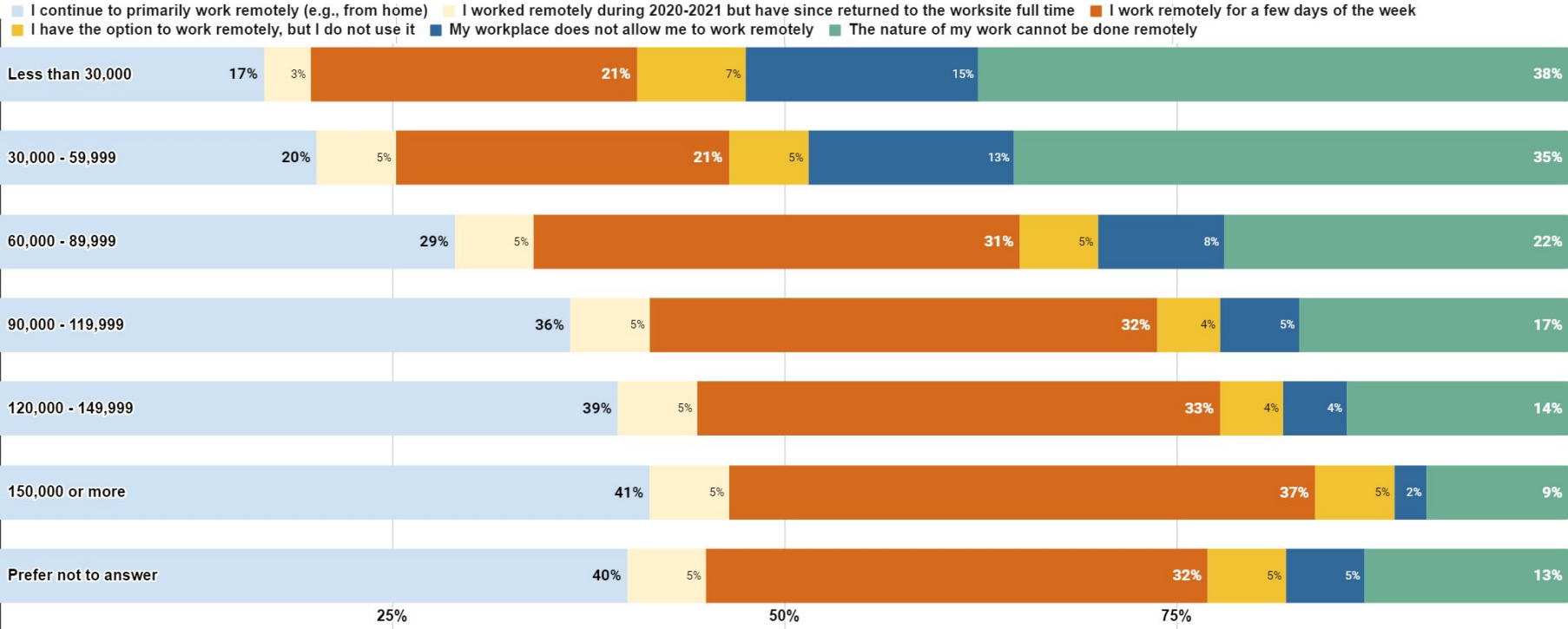
REMOTE WORK AVAILABILITY

BY GENDER



Q19: Do you identify as...? Q38: Please select one option that best describes the availability of remote work for you.
 Remote = commute 5 days/week remotely. In-person = commute 5 days/week physically. Hybrid = commute any day of the week remotely. (N=50,137)

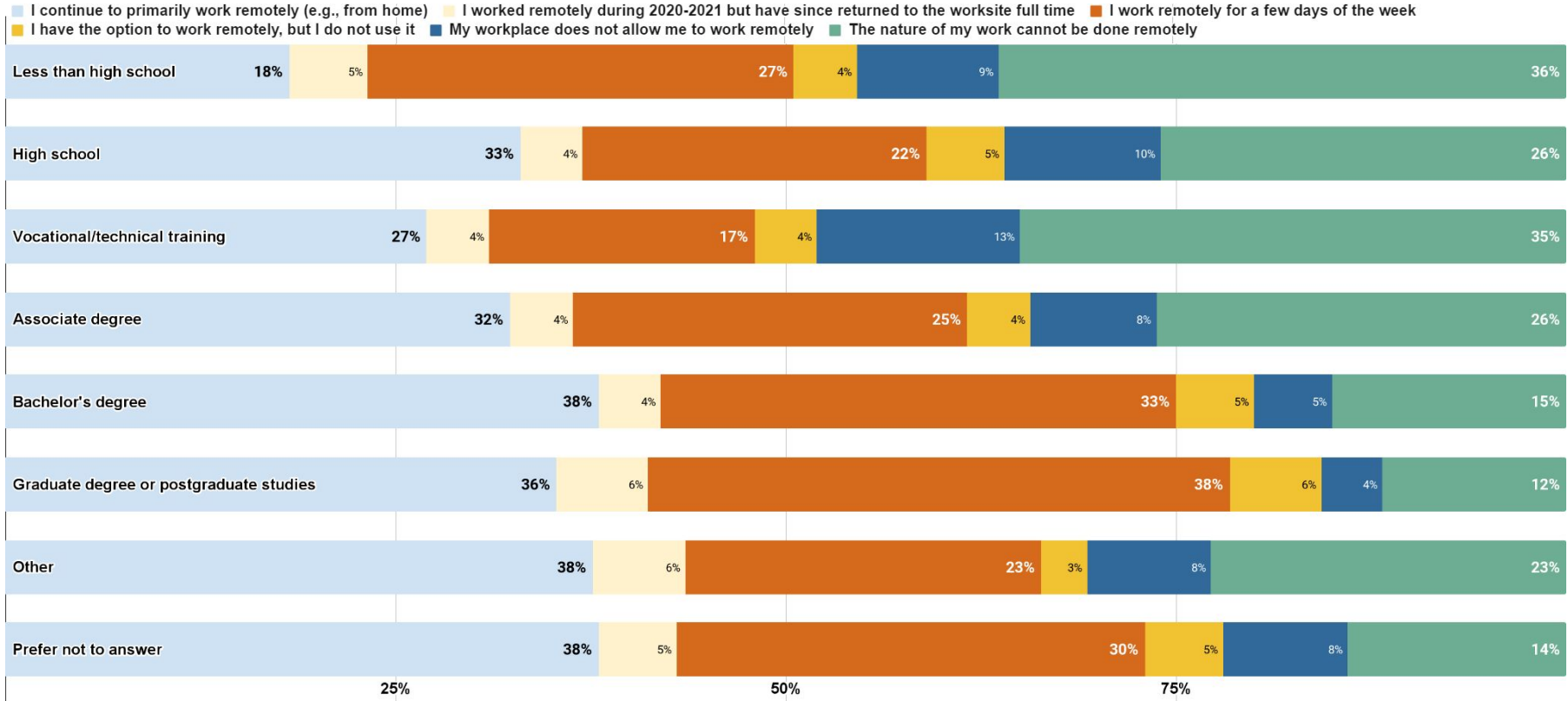
REMOTE WORK AVAILABILITY BY HOUSEHOLD INCOME



Q20: Which of the following best describes your household income last year? Q38: Please select one option that best describes the availability of remote work for you. Remote = commute 5 days/week remotely. In-person = commute 5 days/week physically. Hybrid = commute any day of the week remotely. (N=48,295)

REMOTE WORK AVAILABILITY

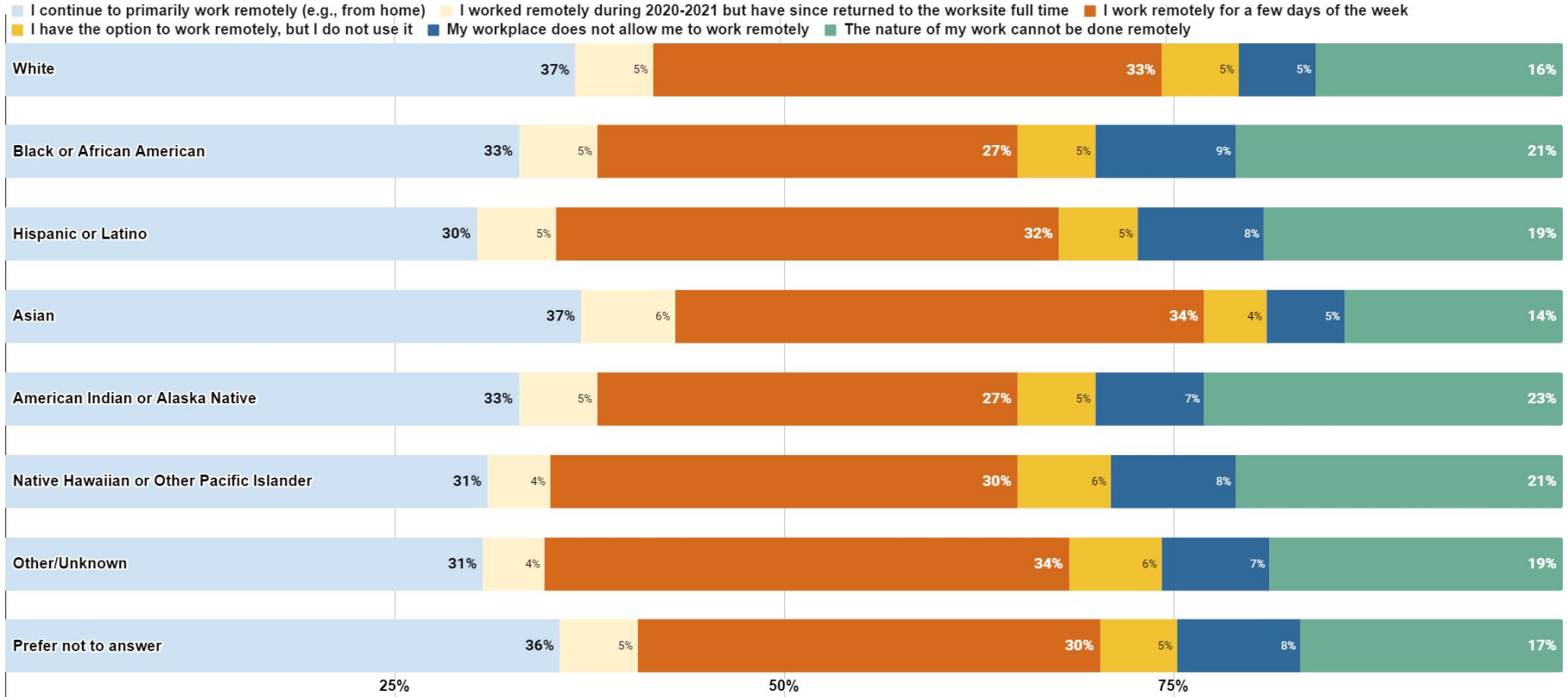
BY EDUCATION



Q21: What is the highest degree or level of education you have completed? Q38: Please select one option that best describes the availability of remote work for you. Remote = commute 5 days/week remotely. In-person = commute 5 days/week physically. Hybrid = commute any day of the week remotely. (N=50,143)

REMOTE WORK AVAILABILITY

BY RACE/ETHNICITY



Q22: Please specify your race/ethnicity? Q38: Please select one option that best describes the availability of remote work for you.
 Remote = commute 5 days/week remotely. In-person = commute 5 days/week physically. Hybrid = commute any day of the week remotely. (N=48,295)

SECTION B

SUMMARY

Work model/arrangement:

- Employees who work **fully remote** make up almost **20%** of total survey respondents, while those who work **hybrid-remote** make up **45%**. The two combined means that the great majority of employees in 2022 work remotely at least one day a week.
- Employees who work **fully in-person**, or physically commute every weekday, make up around **35%** of total survey respondents.
- Remote work is higher on **Friday and Monday** by respectively **40%** and **30%** than the rest of the weekdays (Tuesday, Wednesday and Thursday).
-

Sociodemographics and remote work:

- **Remote work** is less available for employees from the **LGBTQ+** community. In addition, remote work is less available for underrepresented minorities including **Black and Native American**.
- Restrictions on remote work due to job type or employer are higher for **low-income** employees.
- Employees with **sub-baccalaureate** education are more likely to have jobs that can't be done remotely.



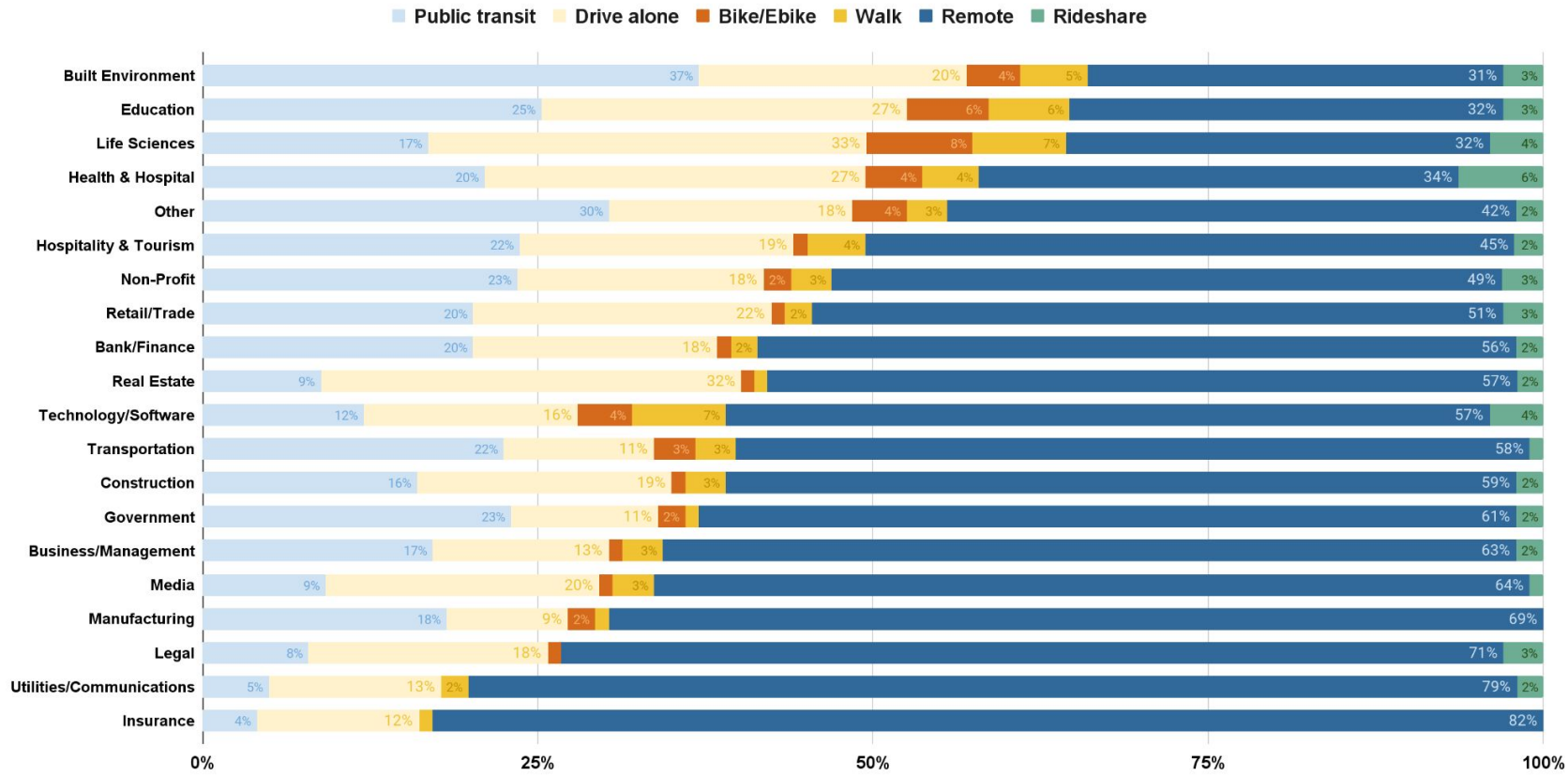
WORK INDUSTRY

C

Section

CTR-AFFECTED COMMUTE MODE IN CENTER CITY

BY WORK INDUSTRY

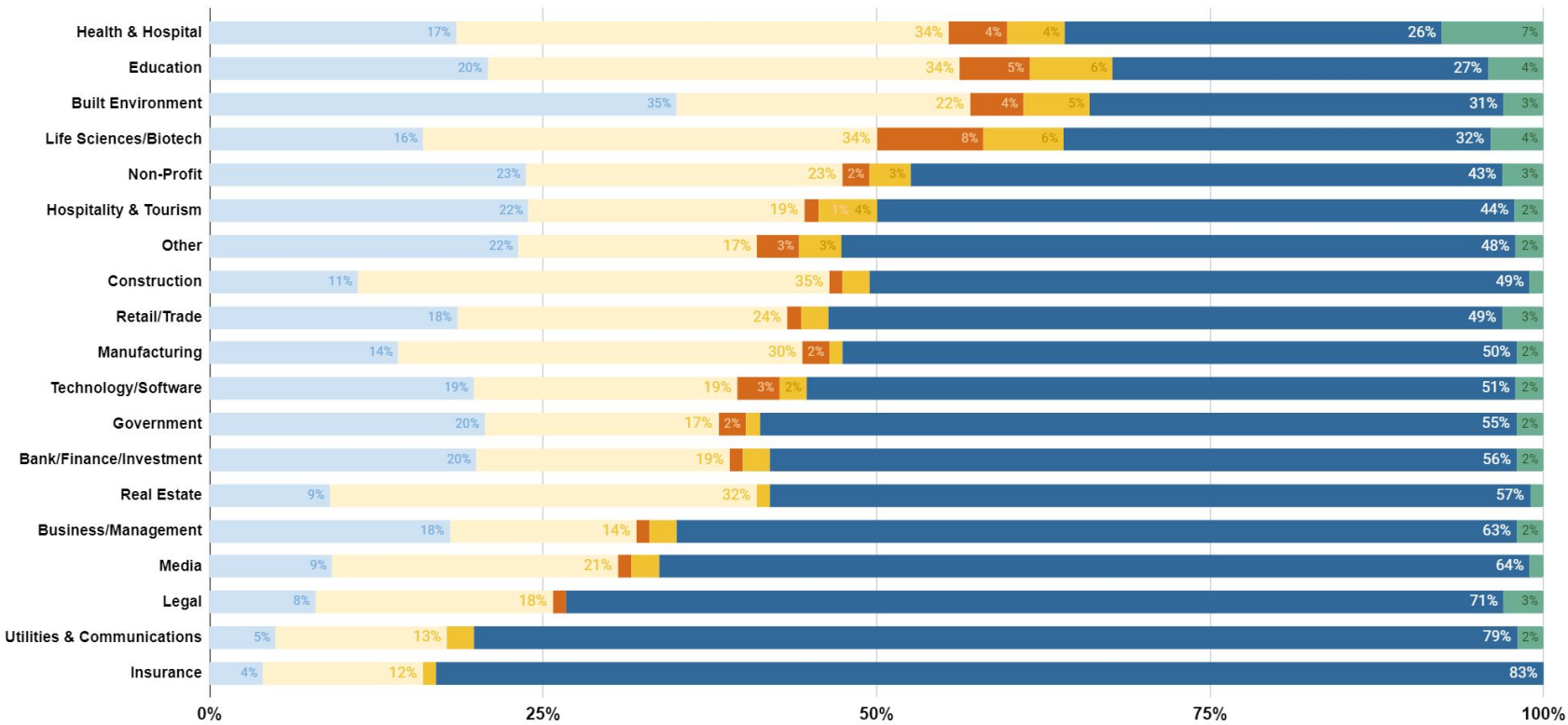


Q10: Currently, during a typical week, how do you get to work each day? This graph shows the average mode split for CTR-affected worksite industry inside Center City area (N = 41,408).

CTR-AFFECTED COMMUTE MODE IN SEATTLE

BY WORK INDUSTRY

Public transit Drive alone Bike/Ebike Walk Remote Rideshare



Q10: Currently, during a typical week, how do you get to work each day? This graph shows the average mode split for CTR-affected worksite industry inside Center City area (N = 55,965).



SECTION C

SUMMARY

Commute Mode Split by Industry:

- **Built environment** related worksites in the Center City have the **lowest** adoption of **remote work**, and the **highest** use of **public transit**.
- **Health, hospitals and education** are the sectors with the lowest adoption of remote work in the entire city of Seattle.
- **Insurance, legal and utilities and communications** have the **highest** adoption of **remote work** which makes up **80%** of their employees' commute mode share.
- **Manufacturing worksites'** adoption of remote work is significantly **higher** in the Center City compared to similar worksites in the entire city of Seattle.
- **Manufacturing, built environment, education, real-estate and health/hospitals** have the **highest drive alone** rate in the city of Seattle.



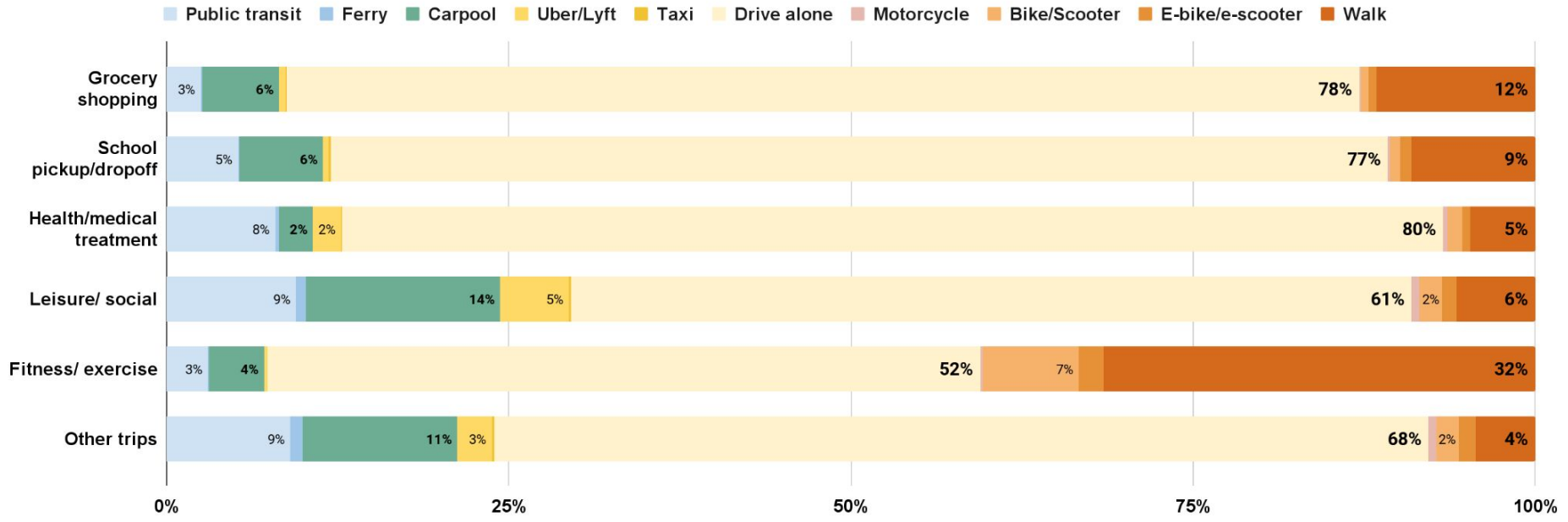
PUBLIC
MARKET

NON-COMMUTE

D

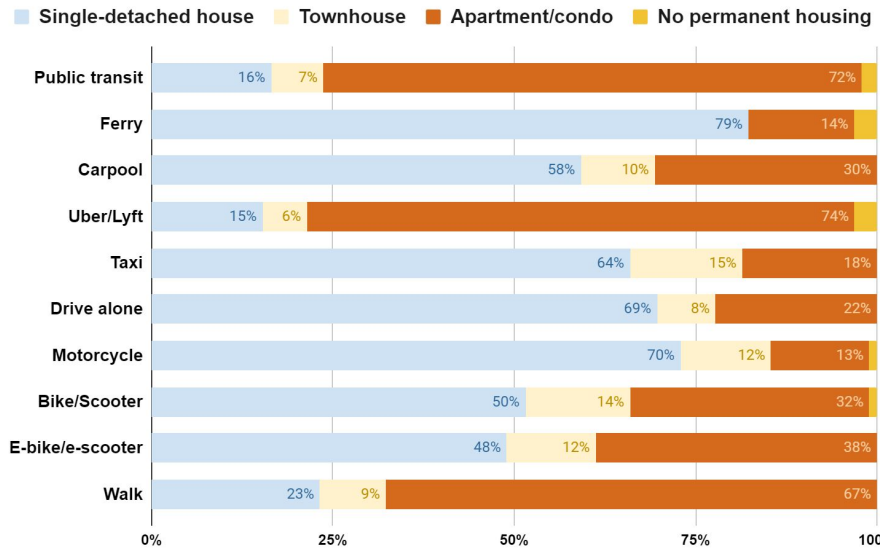
Section

NON-COMMUTE MODE SPLIT BY TRIP PURPOSE

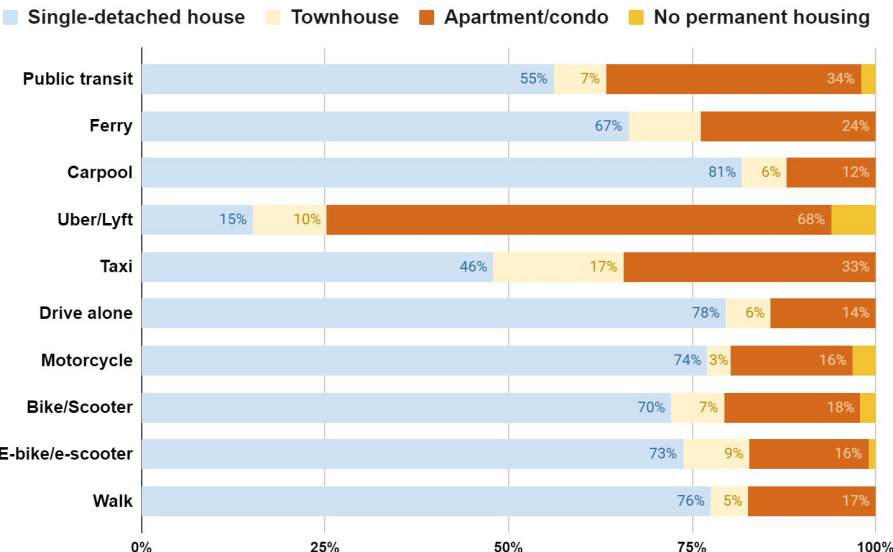


NON-COMMUTE MODE SPLIT BY HOUSING TYPE

GROCERY SHOPPING



SCHOOL PICKUP/DROPOFF



SECTION D

SUMMARY

Non-commute trip types:

- Most respondents reported that the frequency of their non-commute trips (of all types) has either **decreased** or **remained the same** as before the pandemic.
- Most respondents **drive alone** for their non-commute trips of all types.

Non-commute trip type/mode and sociodemographics:

- People who use transit for grocery shopping, healthcare, leisure, or fitness are more likely to live in **apartments or condos**, while people who use transit for **school pickup/dropoff** are more likely to live in single-detached houses.
- People who use **Uber/Lyft** for any non-commute trip type are highly likely to live in **apartments/condos**.
- People who **walk** to grocery stores, health centers or leisure/social activities are more likely to live in **apartments/condos**, while those who walk to school pickup/dropoff or fitness are likely to live in single-detached houses.
- Using **Uber/Lyft** or taxis for grocery shopping or medical care is significantly higher among **Asians**, while using Uber/Lyft for social/leisure trips is exceptionally high among **Whites**.



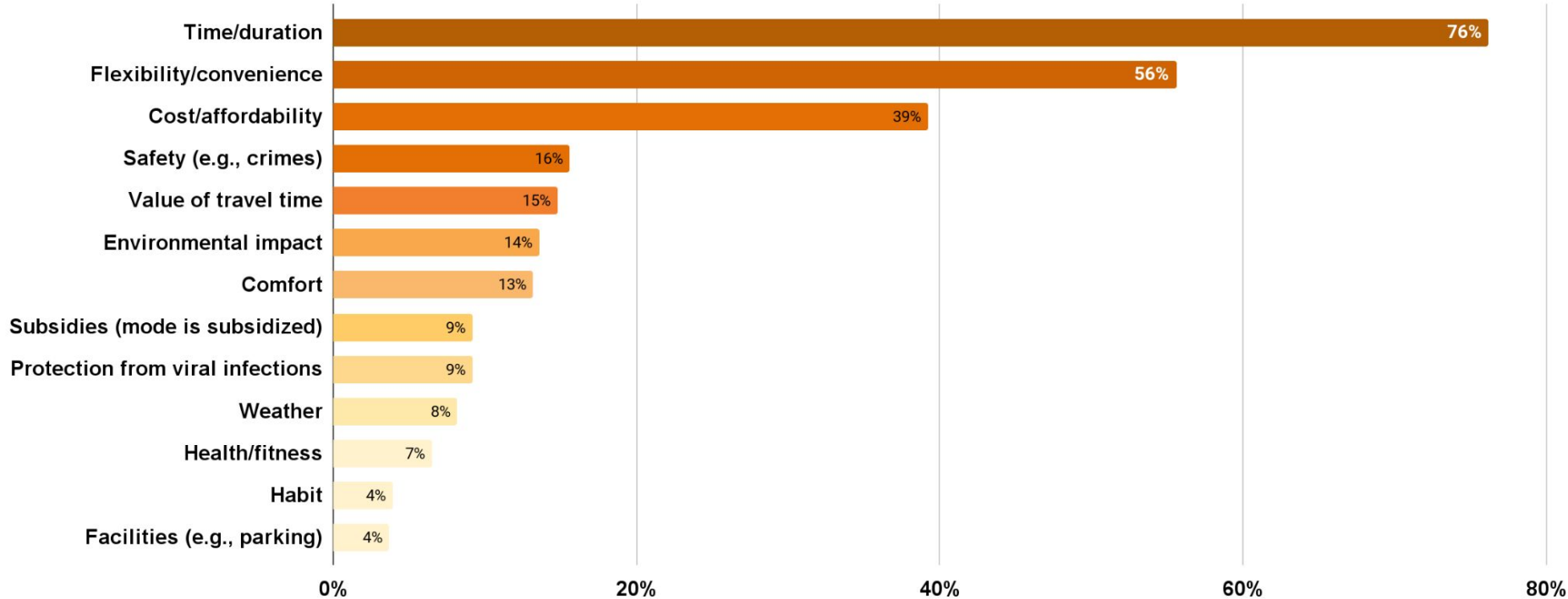
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MODE CHOICE

MODE CHOICE FACTORS

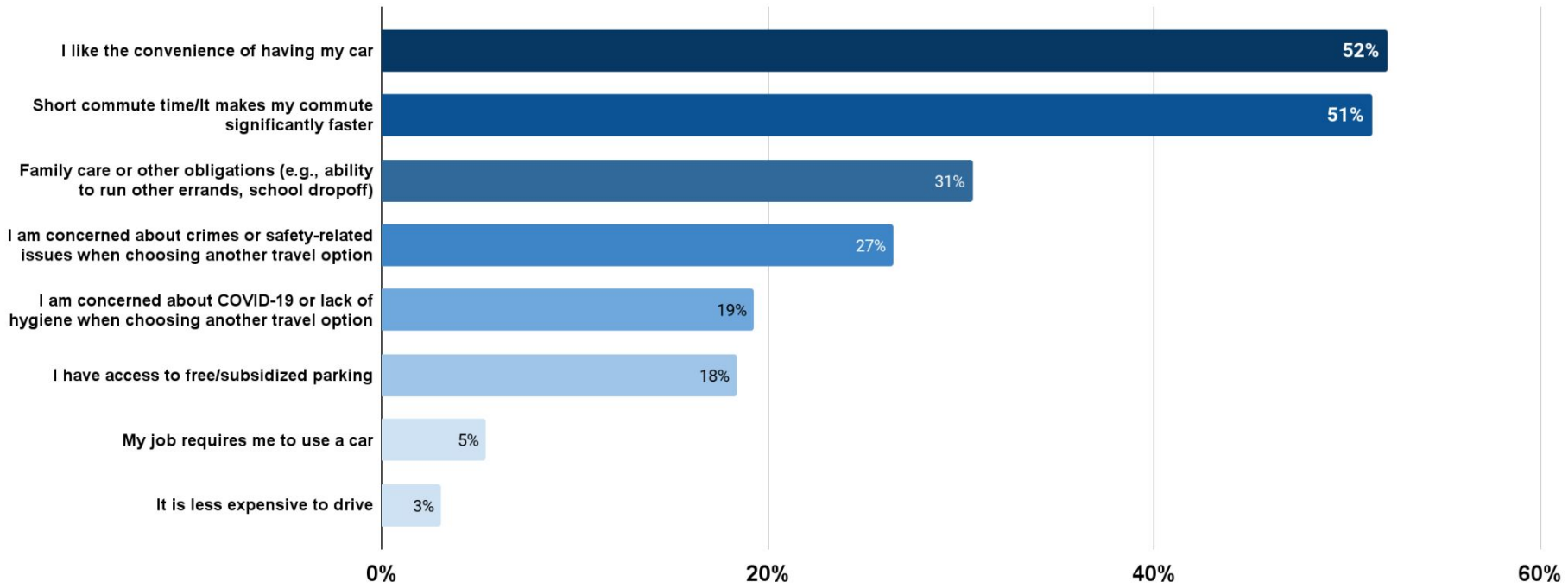
GENERAL REASONS



Q41: Generally, what are the main considerations that affect your travel decisions? Respondents were allowed to select up to three factors hence the percentages don't add up to 100%. (N = 49,892)

MODE CHOICE FACTORS

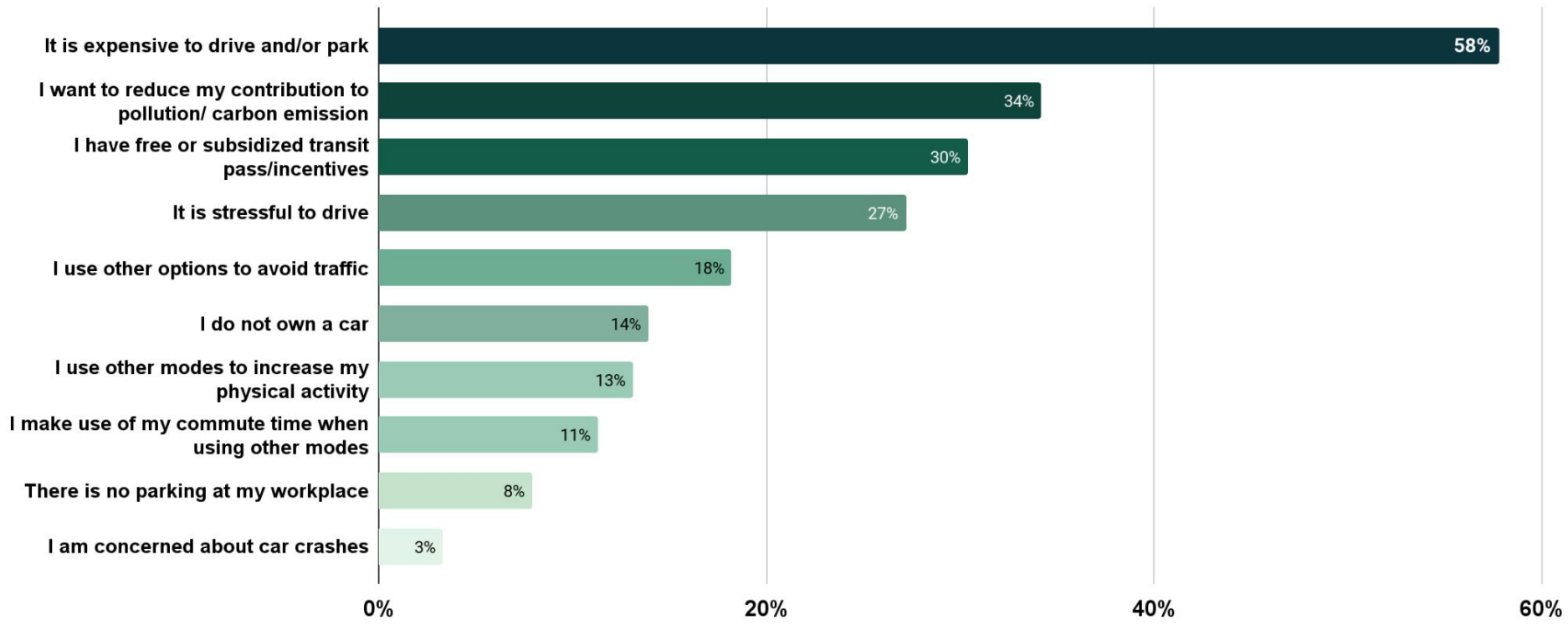
REASONS TO DRIVE



Q39: What are the main reasons you drive alone to work? Others (please specify). (N = 20,791)
*** This question was asked to respondents who indicated they drive alone to work for any of the weekdays only.

MODE CHOICE FACTORS

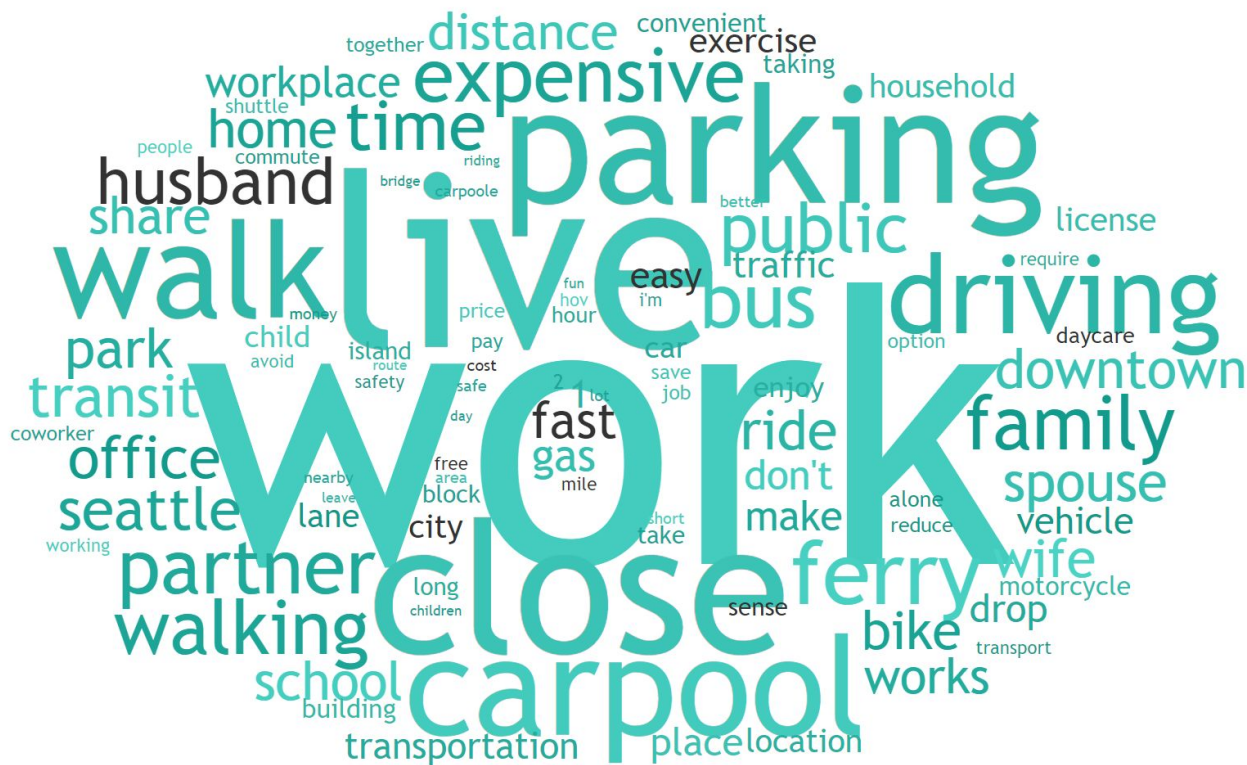
REASONS NOT TO DRIVE



Q40: What are the main reasons you do not drive alone to work? Respondents were allowed to select up to three factors hence the percentages don't add up to 100%. (N = 28,642)
*** This question was asked to respondents who indicated they don't drive alone to work for any of the weekdays only.

MODE CHOICE FACTORS

REASONS NOT TO DRIVE



Q40: What are the main reasons you do not drive alone to work? Others (please specify). (N = 4,131)
 *** This question was asked to respondents who indicated they don't drive alone to work for any of the weekdays only.

SECTION E

SUMMARY

Commute mode choice factors:

- **Time, flexibility, and cost** are the three most critical factors for general commute mode choice.
- **Convenience, short time and family obligations** are the three most important factors that contribute to commuters driving alone to work.
- Commuters who don't drive alone are influenced the most by the high **parking cost, carbon emissions** and the availability of free or subsidized **transit passes**.
- **Safety** is also an important consideration, with 16% of employees citing it as a general factor for their mode choice, and 27% of employees who drive alone indicating it as a reason for their mode choice.
- More respondents indicating concerns about **crimes or safety-related issues** than concerns about **COVID-19 or lack of hygiene** in their travel decision making.

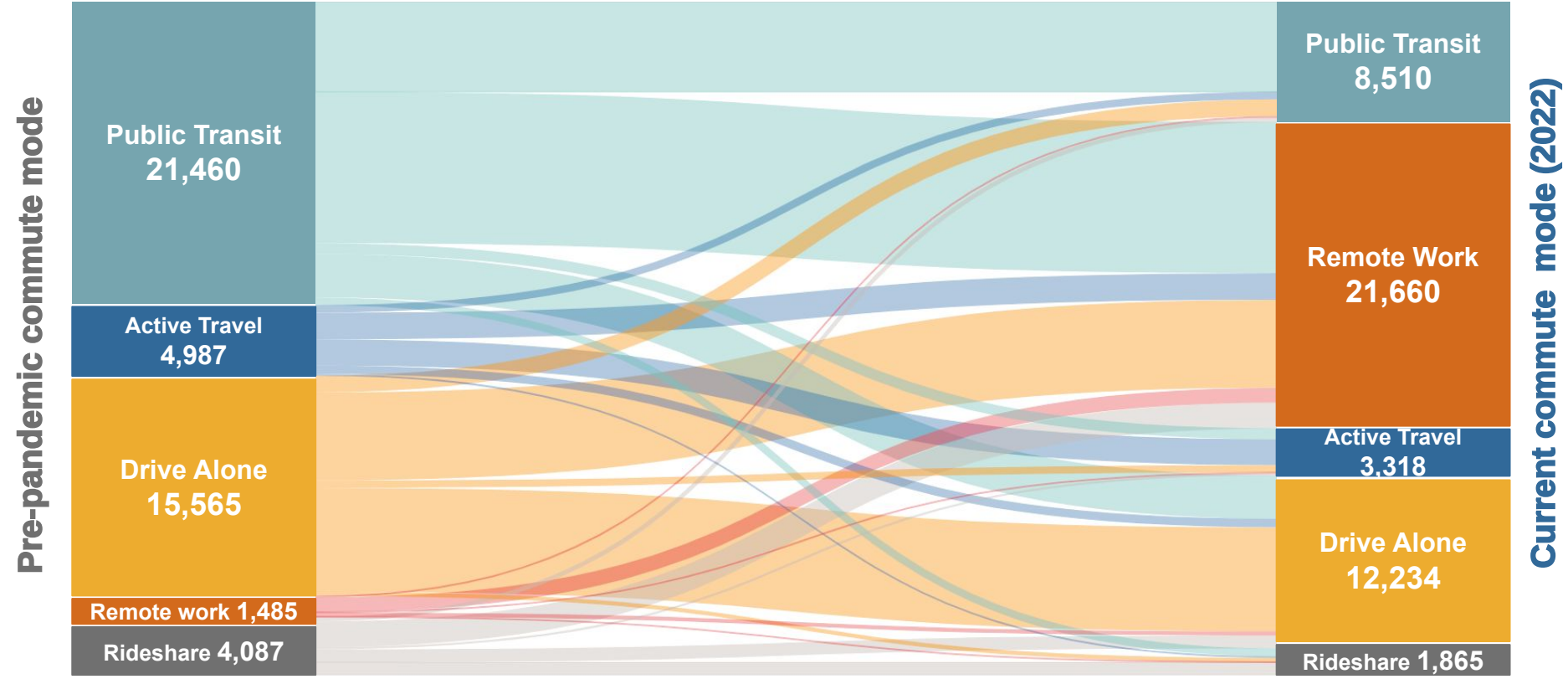


Section



COVID-19 IMPACT

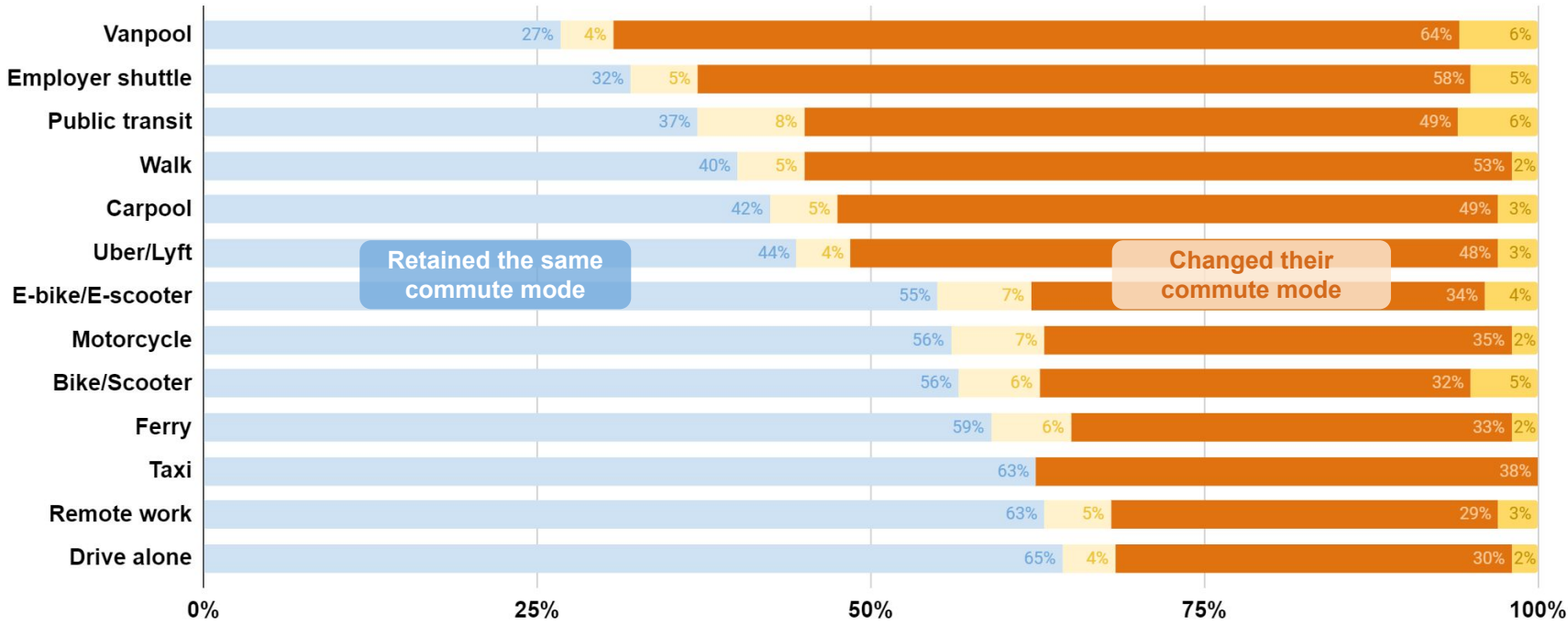
PANDEMIC-RELATED CHANGES TO COMMUTE MODE



Q34: Which transportation mode did you most frequently use to commute to work before the pandemic (pre-March 2020)? This graph excludes modes identified as others. (N=47,587)

PANDEMIC-RELATED CHANGES TO COMMUTE MODE

■ I still use the same commute mode (no change)
 ■ I changed my commute mode during the pandemic (2020-2021), but already have switched back to pre-pandemic...
 ■ I have been using a different commute mode since the outbreak of the pandemic
 ■ I have been using a different commute mode, but I am planning to switch back to...



Retained the same commute mode

Changed their commute mode

Q34: Which transportation mode did you most frequently use to commute to work before the pandemic (pre-March 2020)? This graph excludes modes identified as others.
 Q35: Compared to before the pandemic (pre-March 2020), in what ways has your typical commute mode changed? (N=47,587)

SECTION F

SUMMARY

Commute mode changes (before the pandemic - current):

- **Public transit** was the most commonly used commute mode before the pandemic, as over **40%** of respondents indicated that they used it as the primary commute mode before March 2020. That said, **public transit and rideshare** took the largest hit since the pandemic outbreak, dropping by over **60%**.
- Only **3%** of respondents indicated they engaged in **remote work** before the pandemic. This percentage has increased by over **15 times** than pre-pandemic rates.
- **Active travel modes** have dropped by **30%** than the pre-pandemic rate.
- **Drive alone, including taxis, Uber/Lyft, and motorcycles**, has dropped the least, by only **20%**.
- Only **8%** of respondents indicated that they **switched back** to using **public transit** as their current primary commute mode, and **6%** indicated they plan to switch back to transit.
- Modes that saw the most significant reduction in use include **public transit, vanpooling, employer shuttle, and walking**.
- Modes that saw the slightest reduction in use include **drive alone, ferry, bike/e-bike, and motorcycle**, rendering them more resilient modes.

APPENDIX



For more information, please contact Commute Seattle or Mobility Innovation Center (MIC) at: info@commuteseattle.com mobility@uw.edu



Data weighting:

To ensure representativeness of the survey data and comparability to previous years, we have followed two weighting schemes, applied separately to relative graphs, as follows:

A1- Center City mode split data

To better approximate the broader universe of Center City commuters, commute mode data was weighted based on the reported WSDOT CTR and non-CTR employee counts, in the Center City area, estimated by Commute Seattle as 40% non-CTR-affected employees, and 60% CTR-affected employees.

A2- CTR-affected commuters data

For CTR-affected survey data, we have also weighted responses by total CTR-affected employees in Seattle districts/neighborhoods. Estimated proportions of CTR-affected commuters were weighted within each neighborhood, when applicable.

Weighted Center City Mode Split

A01-01: Weighted daily commute mode data for Center City

	Mode	Mon	Tue	Wed	Thu	Fri	Total
CTR	Public transit	3126.1	4501.3	4358	4069.9	2629.2	18684.5
	Ferry	243.9	392.5	369.1	344.5	194.6	1544.6
	Vanpool	51.9	62.9	64.9	58.4	33.1	271.2
	Carpool	430.1	642.2	626	570.2	325.6	2594.1
	Employer shuttle	49.9	90.2	91.5	95.4	44.8	371.8
	Uber/Lyft	71.4	109.6	102.5	114.8	66.2	464.5
	Taxi	3.9	5.8	7.1	4.5	3.9	25.2
	Drive alone	2915.9	4175	4138.1	4031.7	2577.9	17838.6
	Motorcycle	38.9	53.8	50.6	54.5	32.4	230.2
	E-bike/e-scooter	125.8	180.3	158.9	173.9	115.5	754.4
	Bike/Scooter	291.3	389.9	380.8	387.9	236.1	1686
	Walk	530.6	653.9	681.8	670.1	515.7	3052.1
	Remote	12408.3	9290.7	9484.6	9930.9	13273.7	54388.2
	Other	465.8	205.6	240	247.2	705.1	1863.7
Non-CTR	Public transit	3042.1	3793.3	3761.4	3638.8	2647.9	16883.5
	Ferry	239.7	357	325	303.7	197.1	1422.5
	Vanpool	26.6	32	42.6	32	26.6	159.8
	Carpool	399.6	474.2	532.8	431.5	277	2115.1
	Employer shuttle	26.6	32	26.6	26.6	21.3	133.1
	Uber/Lyft	21.3	42.6	37.3	42.6	42.6	186.4
	Taxi	5.3	0	0	0	0	5.3
	Drive alone	3132.7	3756	3820	3814.6	2743.8	17267.1
	Motorcycle	37.3	58.6	42.6	63.9	47.9	250.3
	E-bike/e-scooter	58.6	63.9	106.6	90.6	85.2	404.9
	Bike/Scooter	287.7	394.2	362.3	394.2	282.4	1720.8
	Walk	436.9	538.1	543.4	474.2	468.8	2461.4
	Remote	5690	4113	4081	4336.7	6345.3	24566
	Other	431.5	181.1	154.5	186.5	650	1603.6

A01-02: CTR-affected and Non-CTR-affected Weights

	Total Employees	Survey respondents	Weight applied
CTR-affected	60%	92%	0.65
Non-CTR-affected	40%	8%	5

A01-03: Weighted Mode Split Data by Weekday (CTR-affected + non-CTR-affected)

Mode	Mon	Tue	Wed	Thu	Fri	Weighted total	Mode Split %
Public transit	6168.2	8294.7	8119.3	7708.8	5277	35568	21%
Ferry	483.7	749.4	694.1	648.1	391.7	2967.1	2%
Vanpool	78.5	94.9	107.5	90.3	59.7	431	0%
Carpool	829.7	1116.4	1158.8	1001.8	602.7	4709.2	3%
Employer shuttle	76.6	122.1	118.1	122	66.1	504.9	0%
Uber/Lyft	92.7	152.3	139.8	157.4	108.8	650.9	0%
Taxi	9.2	5.8	7.1	4.5	3.9	30.6	0%
Drive alone	6048.6	7931.1	7958	7846.3	5321.7	35105.7	20%
Motorcycle	76.2	112.4	93.2	118.4	80.4	480.7	0%
E-bike/e-scooter	184.5	244.3	265.5	264.4	200.7	1159.3	1%
Bike/Scooter	579	784.1	743.1	782.2	518.5	3406.8	2%
Walk	967.5	1192	1225.2	1144.3	984.6	5513.5	3%
Remote	18098.3	13403.7	13565.7	14267.7	19619	78954.3	46%
Other	897.3	386.8	394.5	433.6	1355.1	3467.4	2%
total	34589.9	34589.9	34589.9	34589.9	34589.9	172949.5	100%

A01-04 grouped modes

Mode	Total
Public transit	22%
Drive alone	21%
Bike/E-bike	3%
Walk	3%
Remote	46%
Rideshare	3%
Other	2%

Public transit = public transit (bus, light rail), ferry
 Drive alone = Taxi, Uber/Lyft Motorcycle, Drive alone
 Rideshare = Vanpool, carpool, employer shuttle
 Bike/ebike = e-bike, e-scooter, bike, scooter

A2-01: CTR-affected Responses by Seattle Neighborhood/district Weights

Weighted Districts Mode Split

Row Labels	Employee Count	% total employees	Number of survey respondents	% total survey respondents	Weight = % total employees / % total respondents
Belltown & Denny Triangle	53017	29.20%	8082	14.40%	2.028
Capitol Hill, Pike/Pine, & First Hill	8908	4.90%	2753	4.90%	1
Commercial Core	39679	21.90%	17129	30.50%	0.716
East Seattle	1394	0.80%	888	1.60%	0.485
Elliott Corridor/Interbay	4738	2.60%	974	1.70%	1.504
Fremont/Green Lake	5646	3.10%	2327	4.10%	0.75
Northgate	2433	1.30%	1035	1.80%	0.727
Pioneer Square/ Chinatown/ International District	6683	3.70%	3372	6.00%	0.613
South Lake Union & Uptown	38637	21.30%	11145	19.90%	1.072
South Seattle	12896	7.10%	4889	8.70%	0.815
U District	7016	3.90%	3494	6.20%	0.621

A2-02 Weighted Mode Split Data for CTR-affected Employees by Neighborhood

	Mon	Tue	Wed	Thu	Fri
Carpool	1280.4	1781.3	1757.7	1644.0	1056.9
Drive alone	10479.2	13907.7	13907.7	13745.5	9432.3
E-bike/e-scooter	496.3	691.5	630.3	688.3	457.4
Employer shuttle	262.8	485.8	475.5	468.4	238.7
Ferry	486.4	767.4	756.1	701.7	403.9
Motorcycle	114.4	165.8	143.4	171.4	101.9
Other	1875.6	1121.2	1199.7	1252.8	2527.0
Public transit	7223.7	9802.2	9683.7	9250.5	6338.5
Remote	30302.4	22759.8	22946.2	23613.5	32152.0
Taxi	17.7	27.2	34.8	29.2	13.0
Uber/Lyft	295.7	414.4	379.3	425.8	309.8
Vanpool	181.6	213.4	221.6	193.6	134.6
Walk	1980.6	2455.1	2526.6	2477.6	1944.6
Bike/Scooter	971.6	1369.4	1300.2	1303.1	854.8

A2-03 grouped modes

Mode	Total
Public transit	16.2%
Drive alone	22.9%
Bike/E-bike	3.1%
Walk	4.1%
Remote	47.1%
Rideshare	3.7%
Other	2.9%

Public transit = public transit (bus, light rail), ferry

Drive alone = Taxi, Uber/Lyft Motorcycle, Drive alone

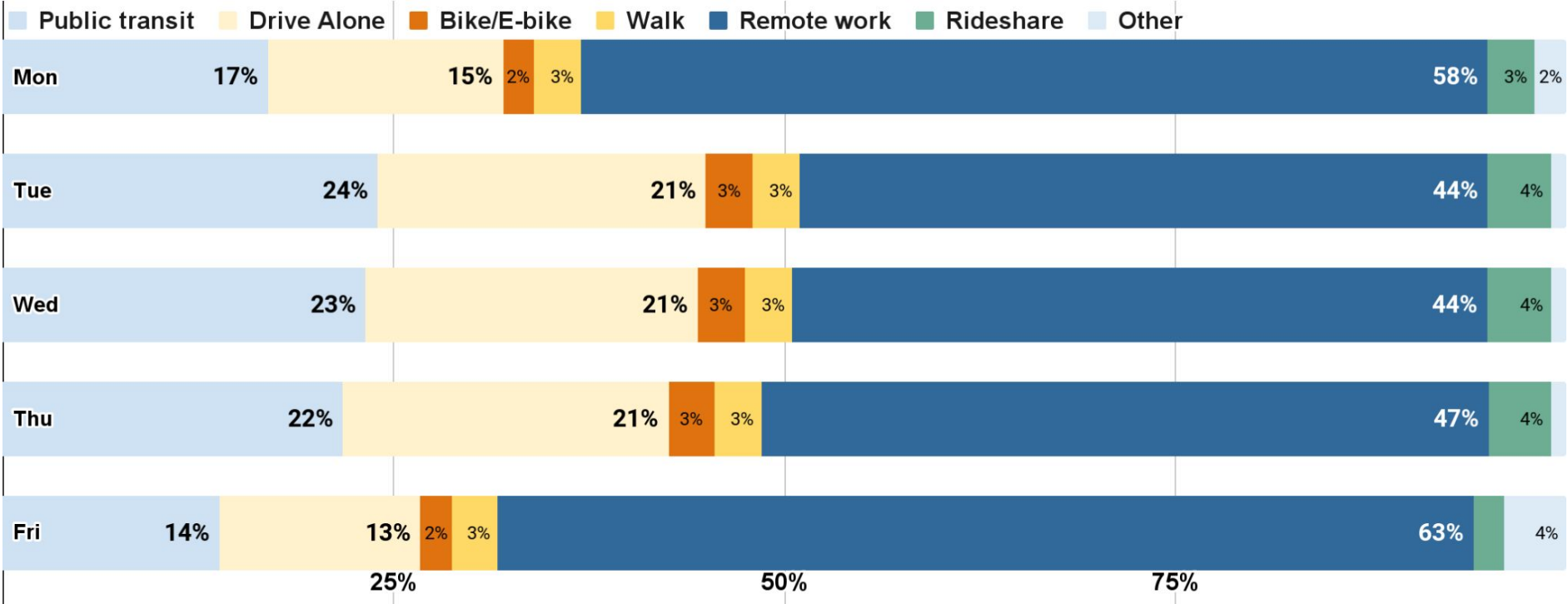
Rideshare = Vanpool, carpool, employer shuttle

Bike/ebike = e-bike, e-scooter, bike, scooter

Weighted Districts Mode Split

MODE SPLIT

UNWEIGHTED CENTER CITY COMMUTE BY WEEKDAY



Q10: Currently, during a typical week, how do you get to work each day? (Monday, Tuesday, Wednesday, Thursday, Friday). (only 6-9 am are included in the graphs).
 The graph shows the percentage of mode split for every day of the workweek, for respondents who work inside central Seattle for both CTR-affected and non-CTR-affected worksites..
 Sample: Unique respondents: (N central city = 34,642) . Total trips: (N central city = 173,210).

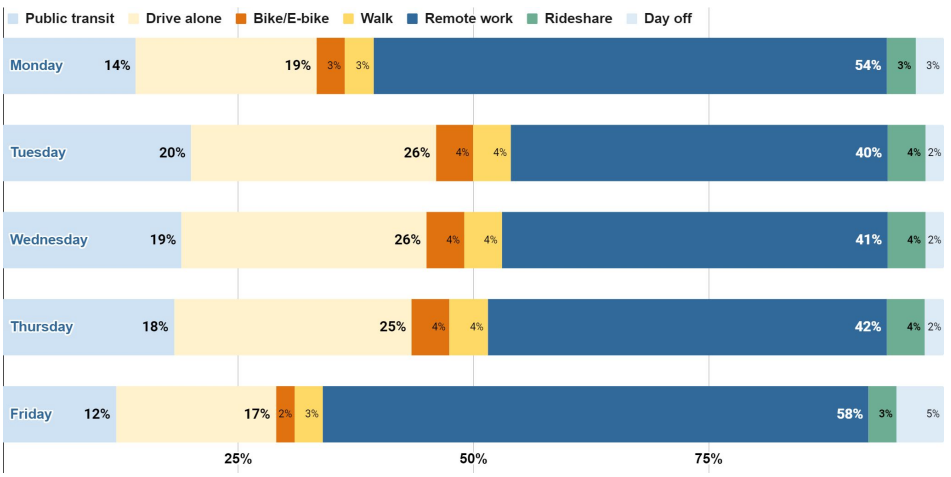
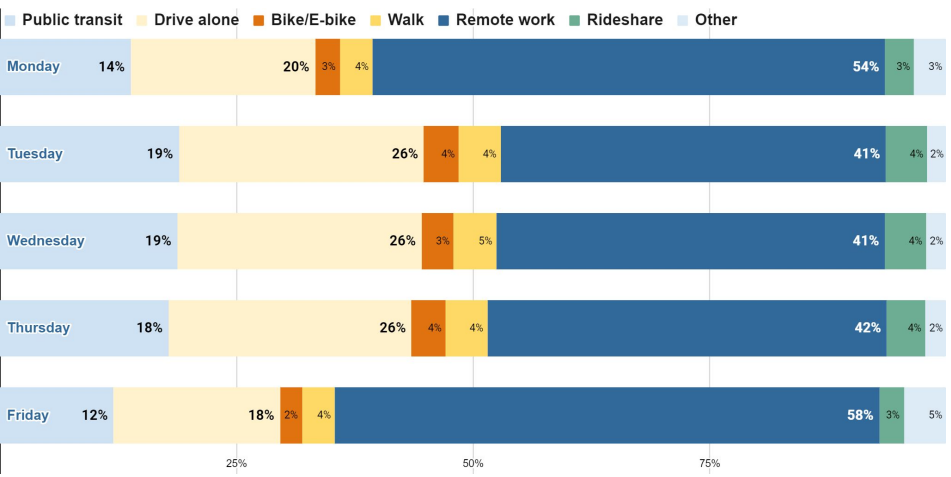
MODE SPLIT

WEIGHTED/UNWEIGHTED CTR-AFFECTED RESPONSES

Weighted CTR WORKSITES

Weighted n = 55,965
Weighted MoE = ±1 pts

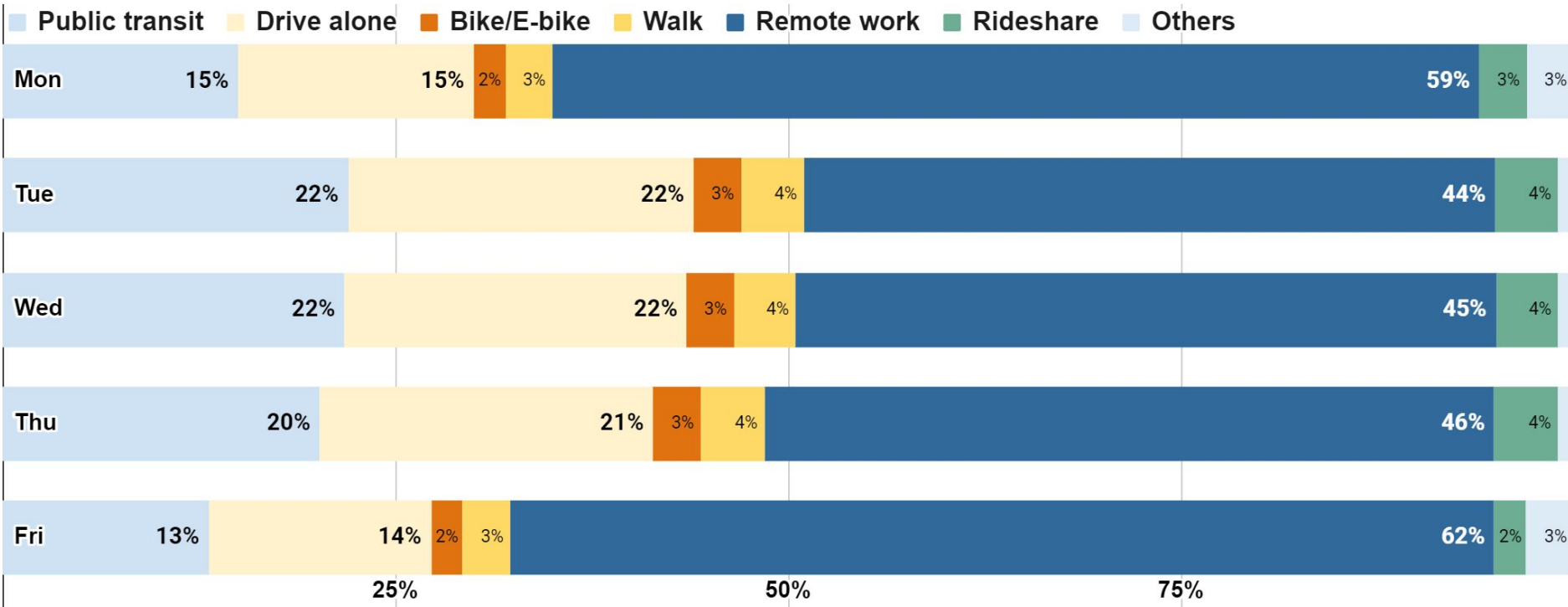
Unweighted CTR WORKSITES



Q10: Currently, during a typical week, how do you get to work each day? (Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Sunday). Q8: When do you typically begin work?
 The graph shows the percentage of mode split aggregated for all weekdays, for respondents who work with CTR-affected worksites inside Seattle. N = 55,965 respondents
 *** Note: The weighted graph on this slide reflect mode split of CTR-affected worksites weighted by the total number of CTR-affected employees in different Seattle Neighborhoods/districts, as shown in slides 75 and 76.

MODE SPLIT

CTR-AFFECTED - UNWEIGHTED Center City BY WEEKDAY



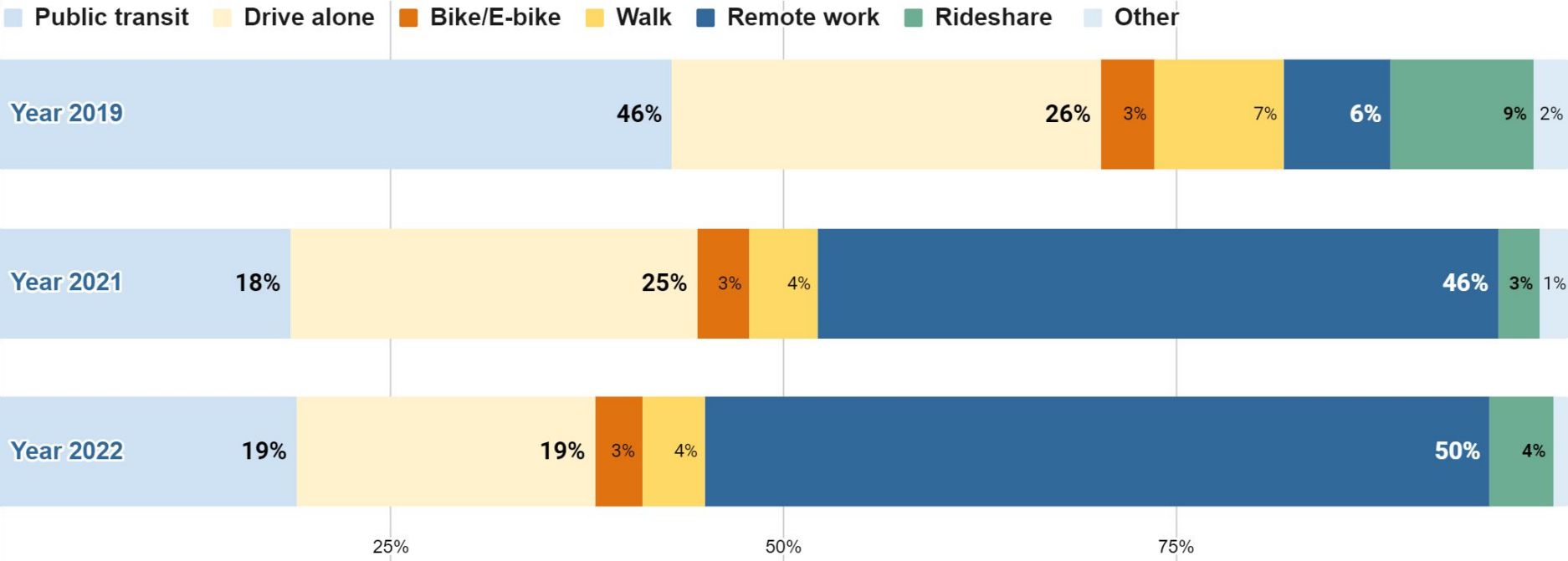
Q10: Currently, during a typical week, how do you get to work each day? (Monday, Tuesday, Wednesday, Thursday, Friday). (only 6-9 am are included in the graphs).

The graph shows the percentage of mode split for every day of the workweek, for respondents who work inside central Seattle.

Sample: Unique respondents: (N central city = 34,642) . Total trips: (N central city = 173,210).

MODE SPLIT

UNWEIGHTED YEAR TO YEAR COMPARISON



Q10: Currently, during a typical week, how do you get to work each day? (Monday, Tuesday, Wednesday, Thursday, Friday). Q8: When do you typically begin work? (only 6-9 am are included in the graphs). The graph shows the percentage of mode split aggregated for weekdays and excluding weekends, for respondents start working between 6-9 am inside central Seattle. N (2022) = 35,854 respondents. Public transit includes bus, light rail, and ferry; Drive alone includes taxi, Uber/Lyft and motorcycle; Rideshare includes vanpool, carpool and employer shuttle; Other includes day off. The graph for 2022 is weighted by the total number of employees for CTR and non-CTR responses in Center City. ** Note : the 2021 & 2022 survey captured respondents' typical modes used each day, compared to 2019, which captured the modes used each day of the preceding week.