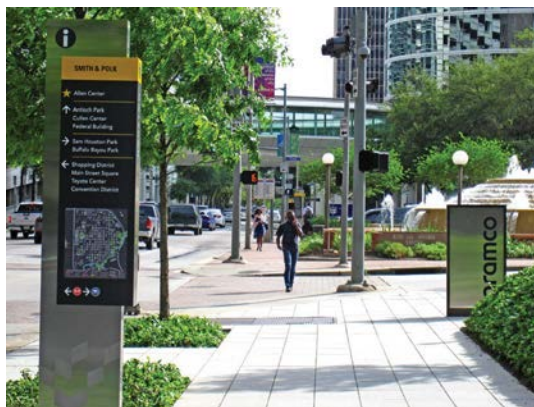
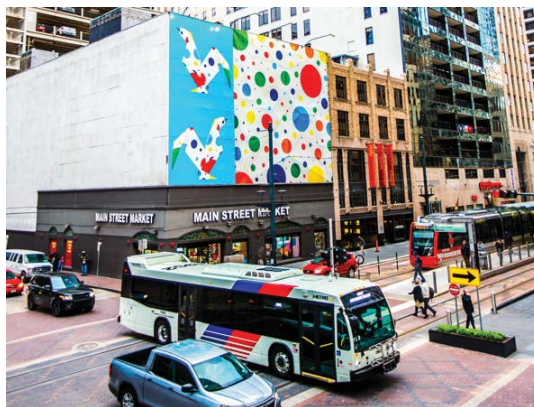


EXECUTIVE SUMMARY

DOWNTOWN

2018 COMMUTE SURVEY



About the 2018 Downtown Commute Survey

About Central Houston, Inc.

Central Houston, Inc. (CHI) is a 501(c)(6) not for profit organization which serves as an advocate of the redevelopment and revitalization of Downtown and the central core, acting as a catalyst for collaboration and coordinated development through facilitation and leadership.

Downtown and the central core are the heartbeat of the city and the region; their continued health and growth is critical to the success of Houston. This is the guiding principal behind Central Houston, founded by Downtown business leaders to ensure that the center city remains vital and progressive. For more than 35 years, supported by its membership, the organization has collaborated, conceived, and implemented remarkable solutions for the complex challenges of our city. Central Houston's focus is long term and big picture.

About the Downtown Commute Survey

CHI is committed to enhancing access and mobility to and within Downtown Houston for employees, visitors, tourists, and residents. CHI has conducted seven surveys of Downtown workers – in 1987, 1999, 2002, 2006, 2009, 2013, and 2018 – to understand commuter travel behavior.

Download the Report

This 2018 Downtown Commute Survey Report is available online:

<https://www.centralhouston.org/downtown-advantage/>

<https://www.downtownhouston.org/resource/transportation/>

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May 2019

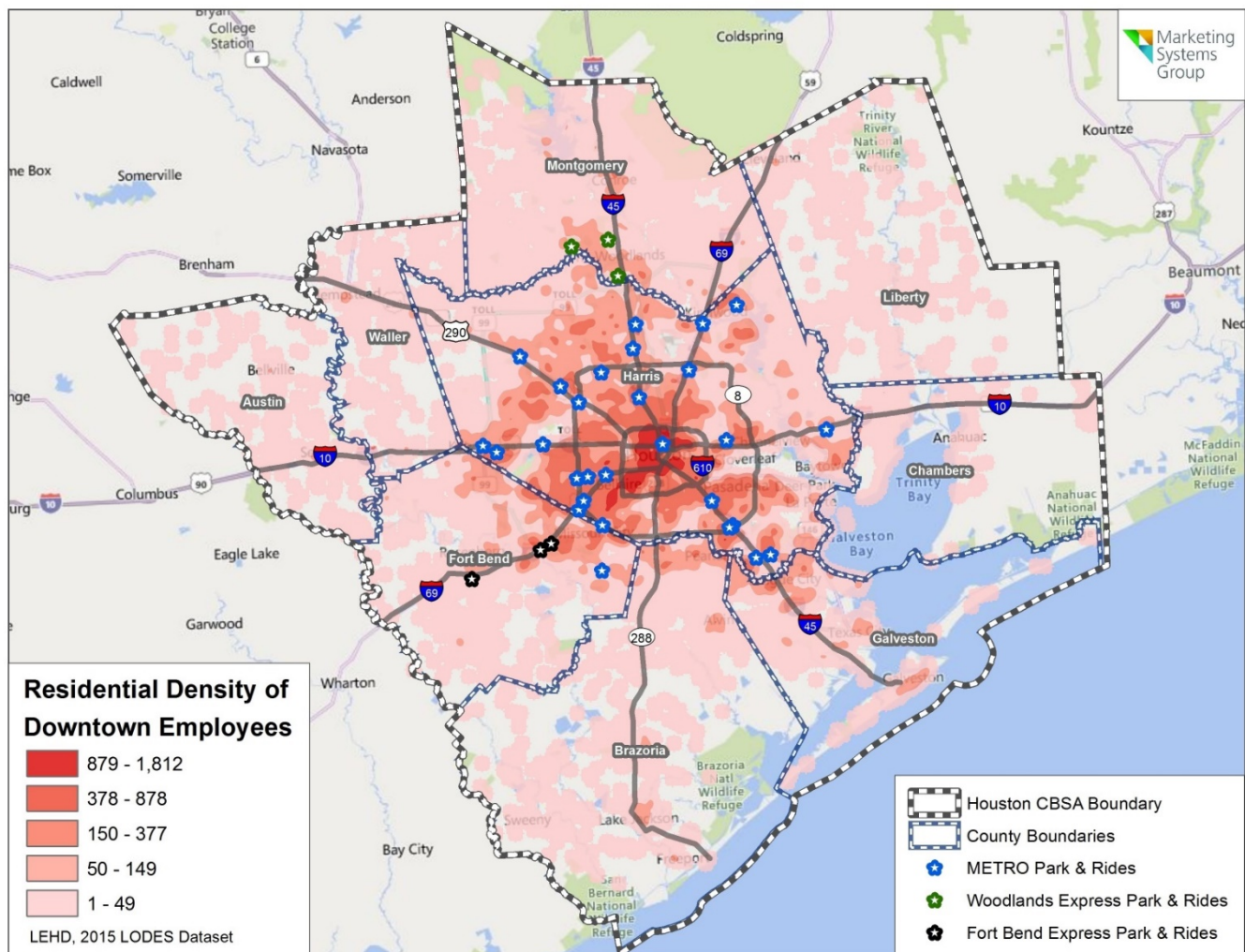
Central Houston

Executive Summary

As the urban core of the fourth largest city in the United States, Downtown Houston is the nucleus of a dynamic regional economy that is shaped by the convergence of geography, history, development, natural systems, and the diverse residents calling Houston home. As the largest activity center in the eight-county region, an estimated 157,906 people worked Downtown, in 2015, within the area bounded by the elevated portions of IH-45, IH-10, and IH-69.

According to the U.S. Census, Downtown employers draw workers from across the Houston region. The following kernel density map, also known as a heat map, shows where workers in Downtown Houston live within the core-based statistical area (CBSA) of Houston.

Map 1. Residential Density of Downtown Employees - LEHD 2015



Source: LEHD, 2015 LODS dataset

2018 Downtown Commute Survey

The research consultant, SSRS, was engaged to ensure that an unbiased, statistically significant sample would be achieved using a random sample from web panels. Survey deployment occurred between November 5 and November 26, 2018, with the survey garnering over 7,600 responses. The consultant weighted the survey responses to provide a representative sample of the Downtown employee population. The survey focused on commute behavior with the goal of eliciting insights to benefit employers, property owners, planners, and public policy makers.

Commute Mode Split

In the 2018 Downtown Commute Survey, respondents identified their primary commute mode – the means by which they usually commute to or from their Downtown place of employment – by selecting from one of the following thirteen options:

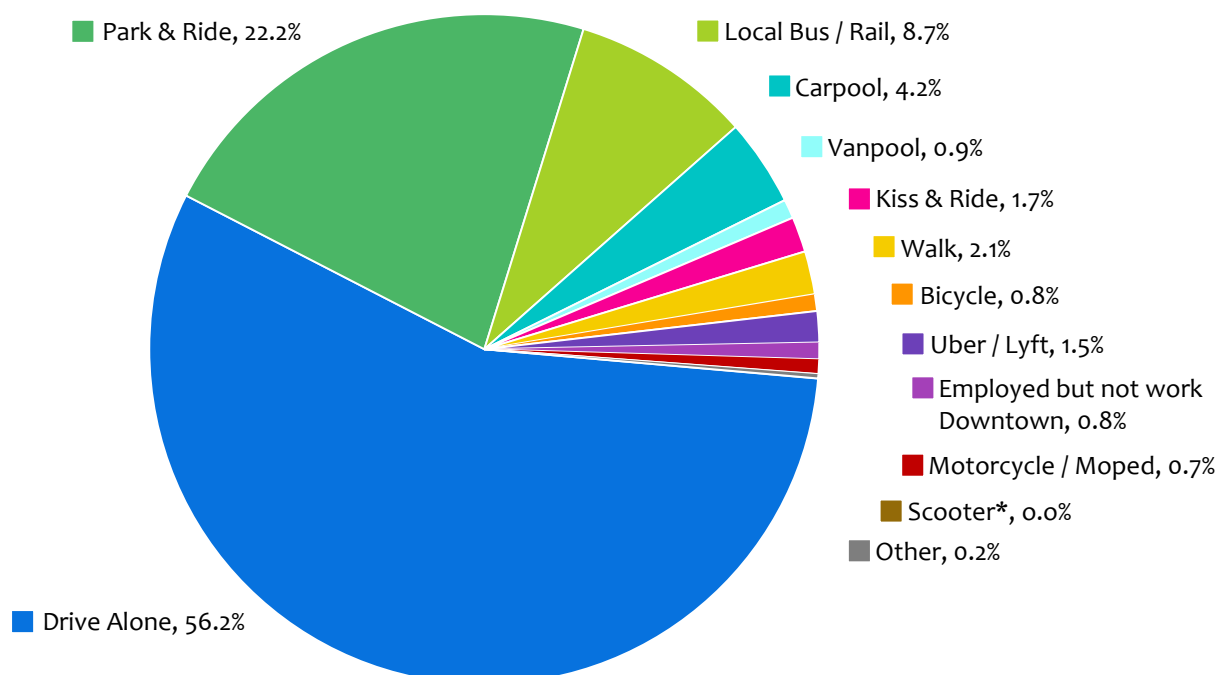
Drive Alone	Carpool	Motorcycle / Moped	Other
Local Bus / Rail	Uber / Lyft	Dropped off by a family member / friend [Kiss and Ride]	
Park & Ride	Bicycle	Employed Downtown, primarily work at non-Downtown location	
Vanpool	Walk	Scooter [Motorized, Electrical, Kick]	

Most Downtown employees (**56.2%**) **drive alone** in a single-occupant vehicle (SOV).

Among the remaining 43.8% of employees:

- **Most (30.9%) utilize public transit**, either **Park & Ride (22.2%)** or their **local bus or rail line (8.7%)**.
- **6.8% share rides** via a **carpool (4.2%)**, **vanpool (0.9%)**, or **“Kiss & Ride” (1.7%)** (family / friend drop off).
- **2.9% are active commuters**, either **walking (2.1%)** or **biking (0.8%)**.
- **1.5% call upon an Uber or Lyft**.
- **0.7% use a motorcycle, moped, or scooter** (motorized, electrical, or kick).
- **0.8% are employed Downtown but primarily work at a non-Downtown location**.
- Over four-in-ten (**40.6%**) survey respondents **use alternative transportation** (transit, shared ride, or active).

Figure 1. Primary Commute Mode



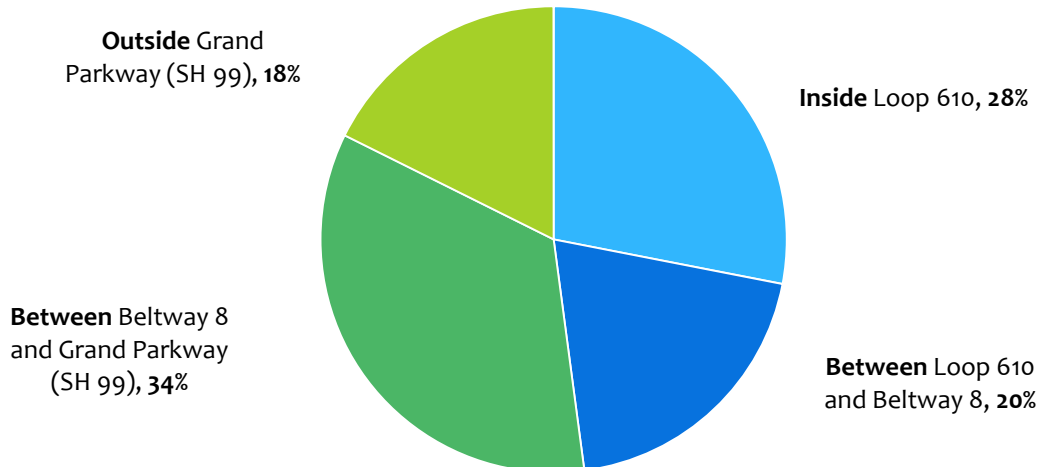
**Less than 0.1% of total weighted respondents.*

Q6. How do you usually commute to/from Downtown? | Base: Total Downtown Houston employees (n=7,672)

Geographic Dispersion

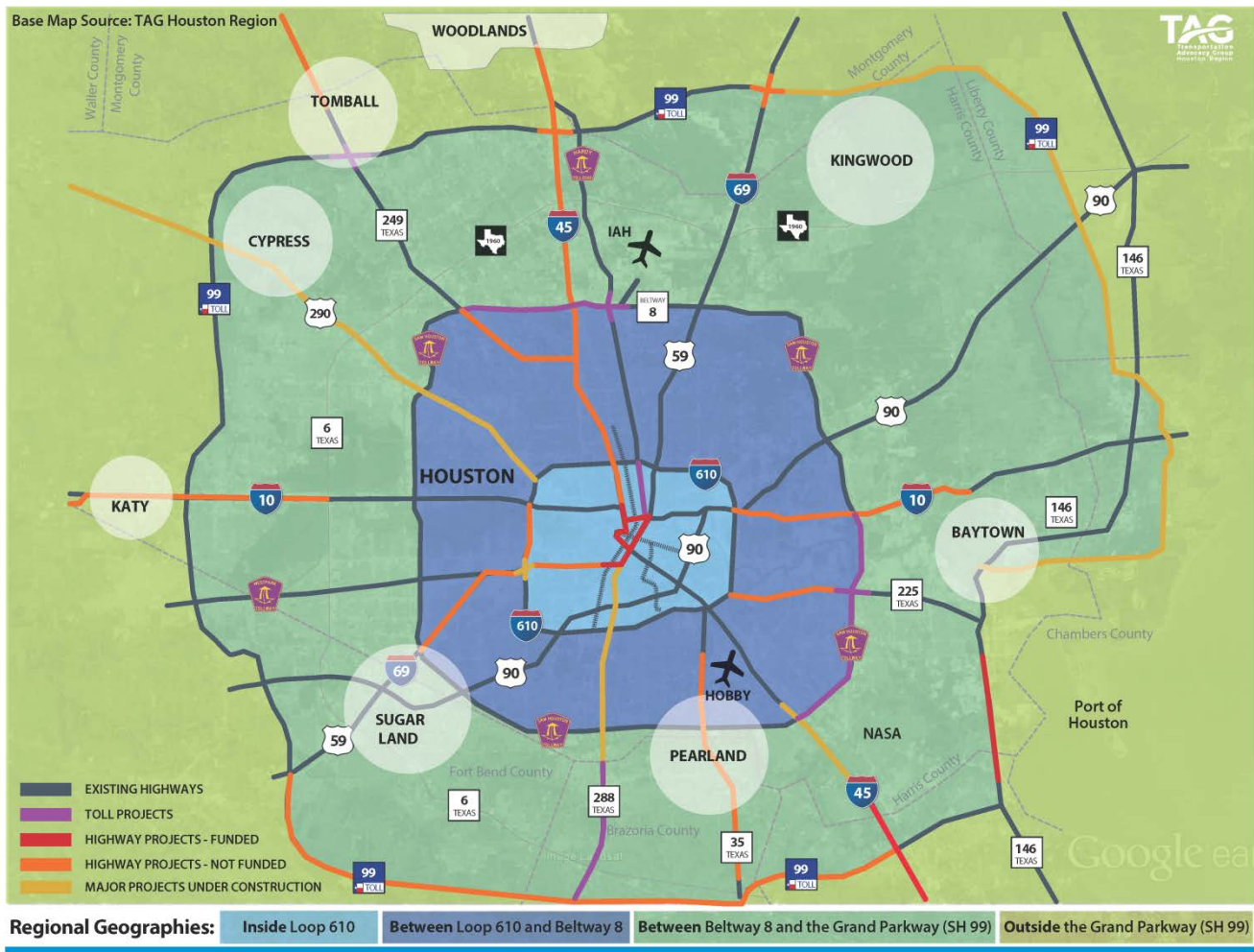
In broad geographical terms, employee residences are fairly equal across four sections of Houston, with more employees living between Beltway 8 and Grand Parkway / SH 99 (34%) or inside Loop 610 (28%).

Figure 2. Houston Area of Residence



Q9. Which of the following best describes the location where you live? Base: Total Houston employees (n=7672)

Map 2. Greater Houston Area Highway Rings



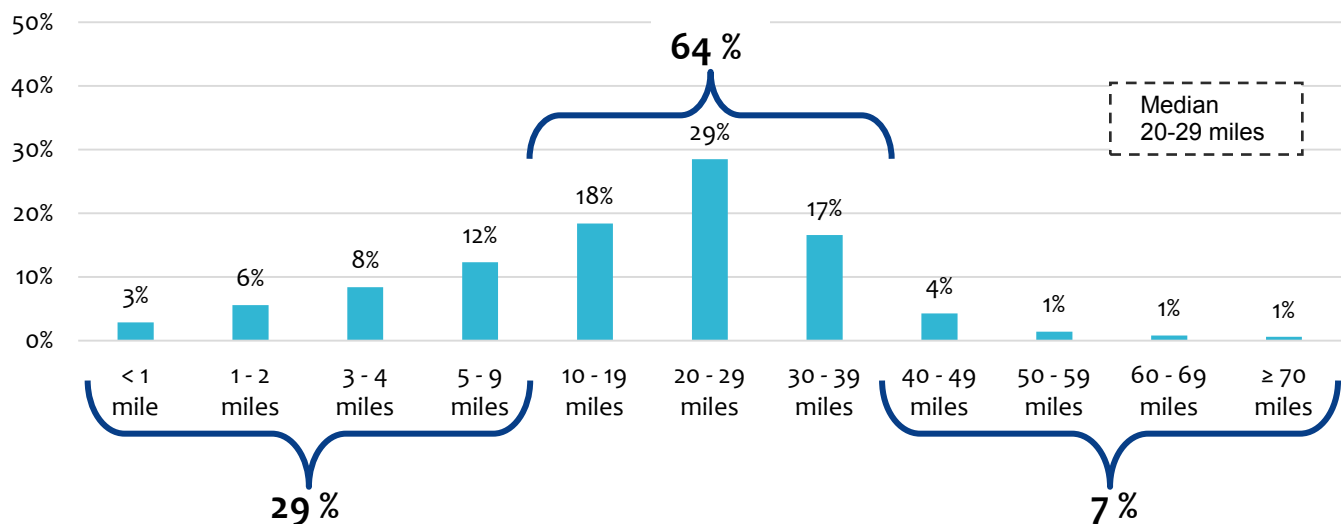
Commute Distance

The median distance travelled by Downtown employees to get to work is between 20 and 29 miles.

Survey responses indicate that:

- 29.2% live within 9 miles of their workplace.
- 18.4% live between 10-19 miles.
- 28.5% live between 20-29 miles.
- 16.6% live between 30-39 miles.
- 7.3% live more than 40 miles from their workplace.

Figure 3. Miles Traveled To Work



Q8. How many miles do you travel to work? | Base: Total Houston employees (n=7672)

Solo driving is largely the most popular commute mode for Downtown employees regardless of trip distance; however, there are two exceptions to this statement:

- Employees living less than one mile from work predominantly travel by foot to get to work (60%). Nonetheless, nearly three-in-ten who travel less than one mile (28%) indicate that they drive to work.
- Downtown employees traveling 30 – 39 miles to work are almost as likely to utilize Park & Ride (41%) as they are to drive alone (43%).

Table 1. Primary Commute Mode

By Miles Traveled To Work

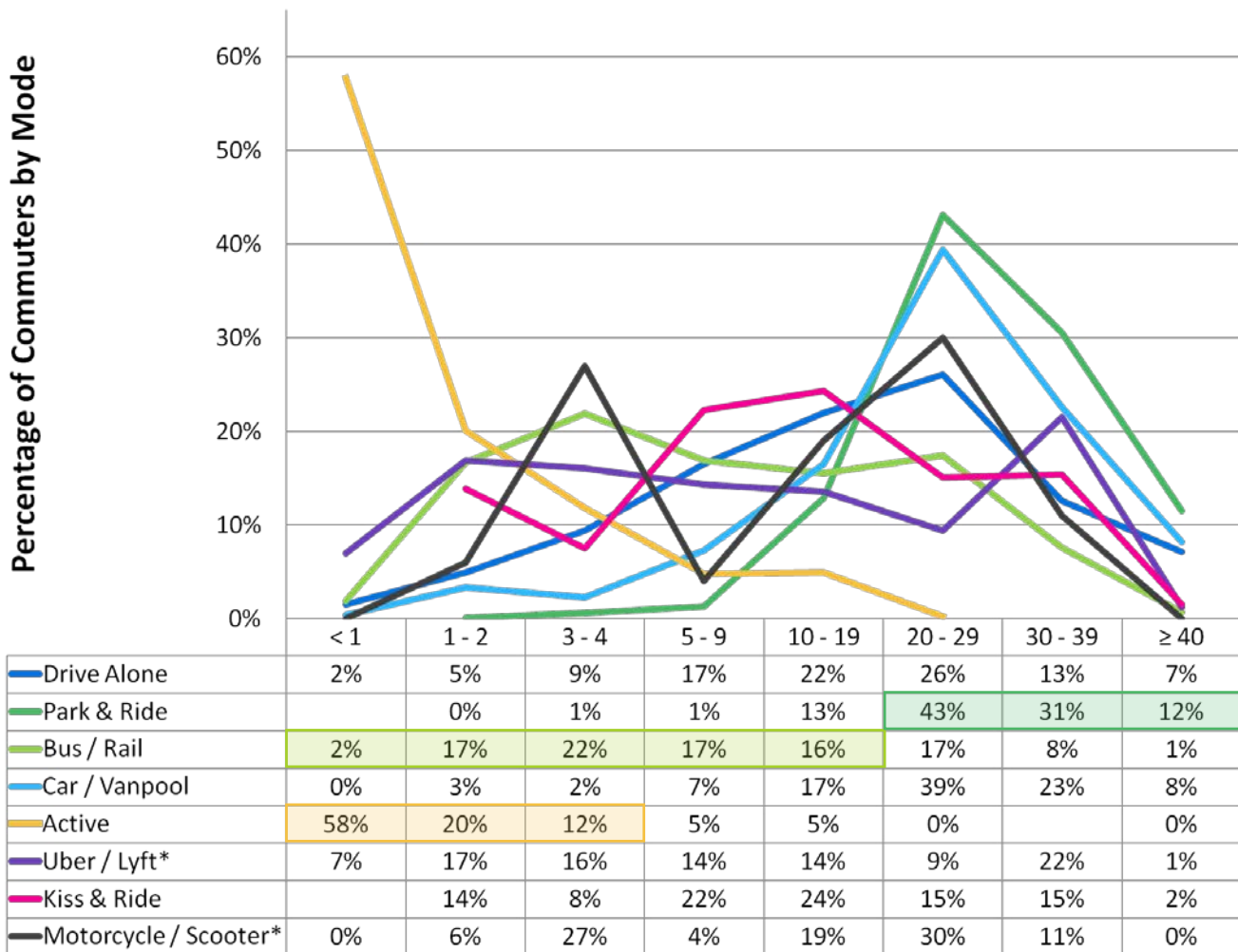
Distance	< 1	1 - 2	3 - 4	5 - 9	10 - 19	20 - 29	30 - 39	≥ 40
Walk	60%	5%	2%	-	-	*	-	-
Bike	0%	5%	3%	1%	1%	-	-	0%
Bus / Rail	6%	26%	23%	12%	7%	5%	4%	1%
Uber / Lyft	4%	5%	3%	2%	1%	1%	2%	0%
Kiss & Ride	-	4%	2%	3%	2%	1%	2%	0%
Motorcycle / Scooter	-	1%	2%	0%	1%	1%	0%	1%
SOV	28%	49%	63%	75%	67%	51%	43%	55%
Car / Vanpool	1%	3%	1%	3%	5%	7%	7%	6%
Park & Ride	0%	0%	2%	2%	16%	34%	41%	36%
N =	127	397	632	1094	1386	2156	1396	478

Q6. How do you usually commute to/from Downtown? Base: Total Houston employees
Highlighted cells indicate the median miles for that given primary commute mode.

Impact of Commute Distance on Mode

As evinced by the figure below, distance from place of employment directly influences primary commute mode.

Figure 4. Miles Traveled To Work
By Primary Commute Mode



Q8. How many miles do you travel to work?

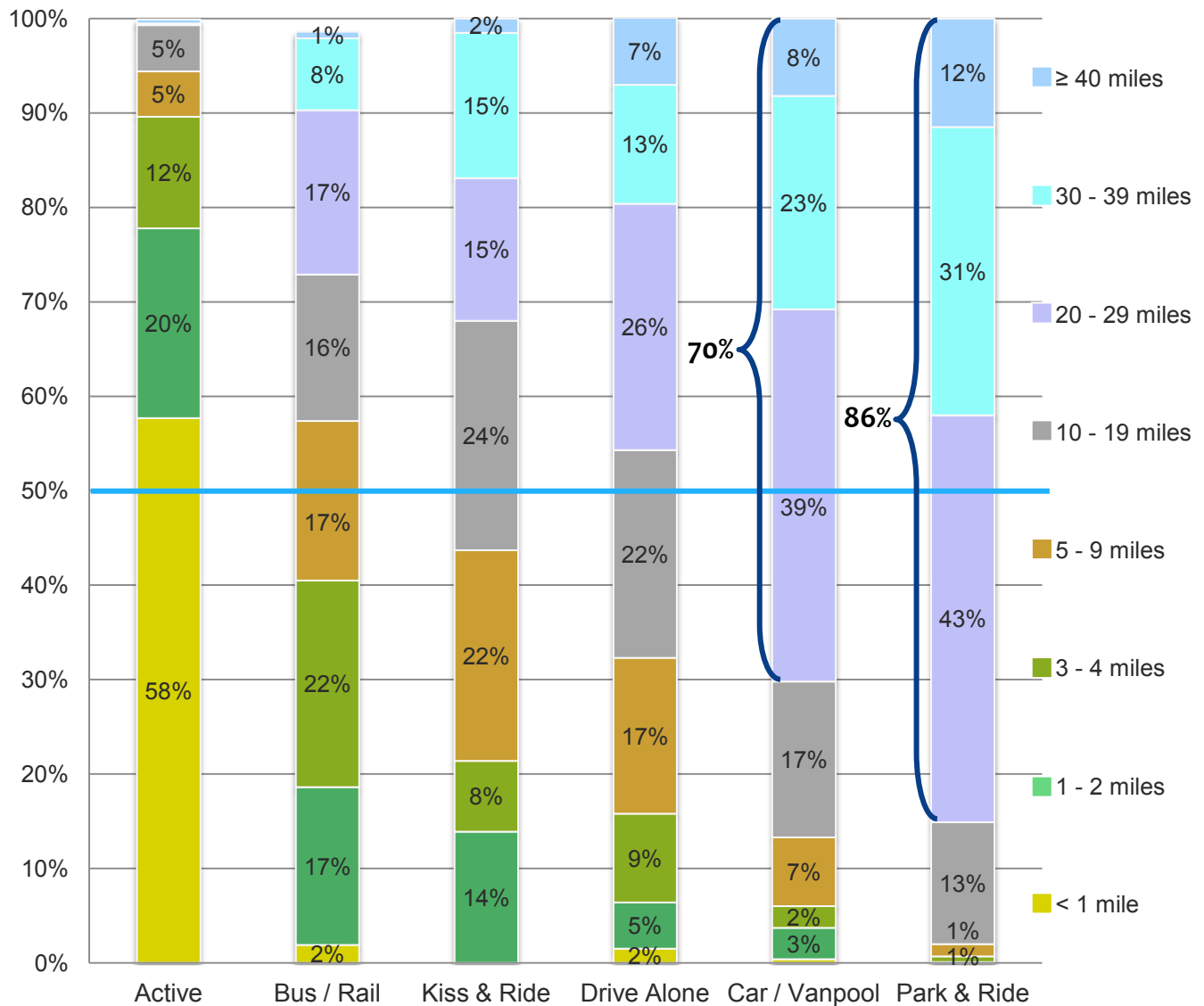
Base: Total Houston employees (Drive Alone n=4344, Park & Ride n=1972, Local Bus / Rail n=466, Carpool / Vanpool n=476, Active n=160, Uber / Lyft* n=67, Kiss & Ride n=117, Motorcycle / Scooter* n=25) | *Sample sizes less than 100 should be interpreted with caution.

- Nearly all (90%) actively commuting to work by walking or biking live less than 4 miles from their place of employment, more than three fourths (78%) live within 2 miles, and over half (58%) live within one mile.
- Almost three-fourths (74%) of local transit commuters live within 19 miles of their workplace, which is not surprising in light of the low average speeds of local bus and rail travel. Nine-in-ten (91%) local transit commuters live within 29 miles of their workplace.
- Conversely, Park and Ride commuters live the furthest away as the clear majority (86%) travel 20 miles or more to work. In fact, 43% of Park & Ride users are based 30 or more miles away from work. Park & Ride use falls off dramatically at distances of over 40 miles, as do the number of Park & Ride services available.

There are clear indications that distance from commute origin to one's place of work dictates primary commute mode. The horizontal blue line in the graph below is illustrative of where the majority sample begins, which also correlates with shifts in commute modes.

When the majority travel 20 miles or further to work, they choose a mode which reduces the stress of commuting – carpool, vanpool, or Park & Ride, supporting the case for outward expansion of Park & Ride services.

Figure 5. Primary Commute Mode
By Miles Traveled To Work



Q8. How many miles do you travel to work?

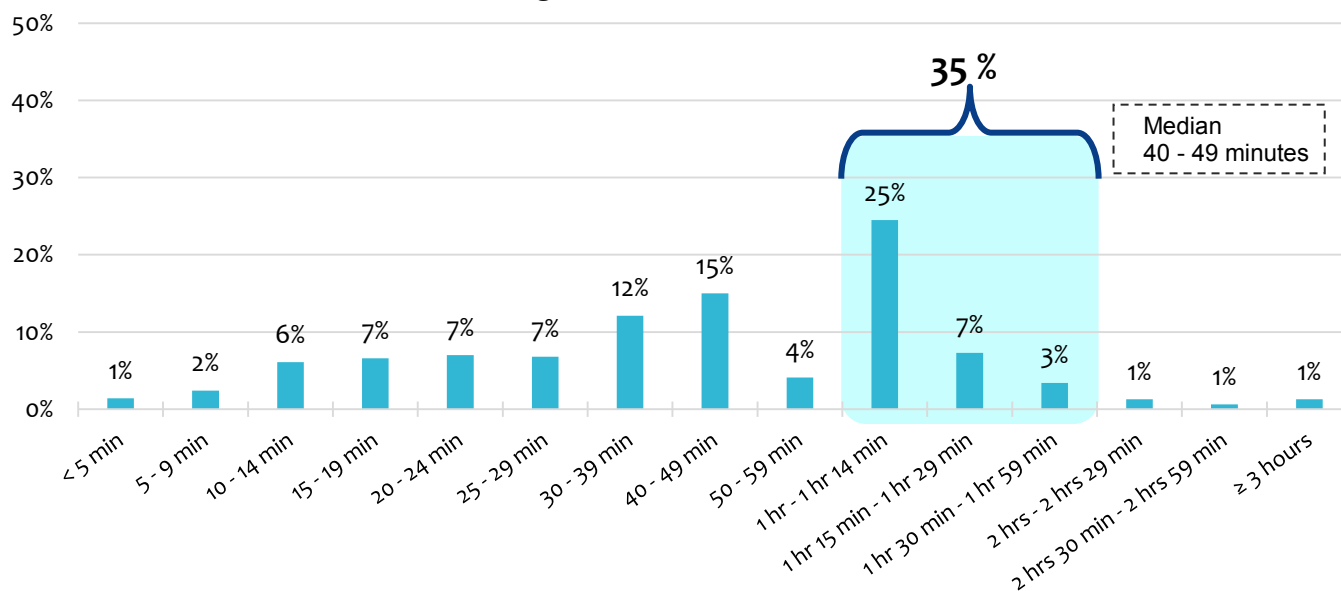
Base: Total Houston employees (Drive Alone n=4344, Park & Ride n=1972, Local Bus / Rail n=466, Carpool / Vanpool n=476, Active n=160, Kiss & Ride n=117) | Motorcycle / Scooter and Uber / Lyft removed due to small base sizes.

Commute Duration

The most commonly reported one-way commute length is between 1 hour and 1 hour and 14 minutes (25% To Work, 26% From Work). Commute times to work tend to be shorter than commute times from work.

- The median time for employees to travel to work is 40 - 49 minutes.
- Three-in-ten employees (30%) travel to work in less than 30 minutes.

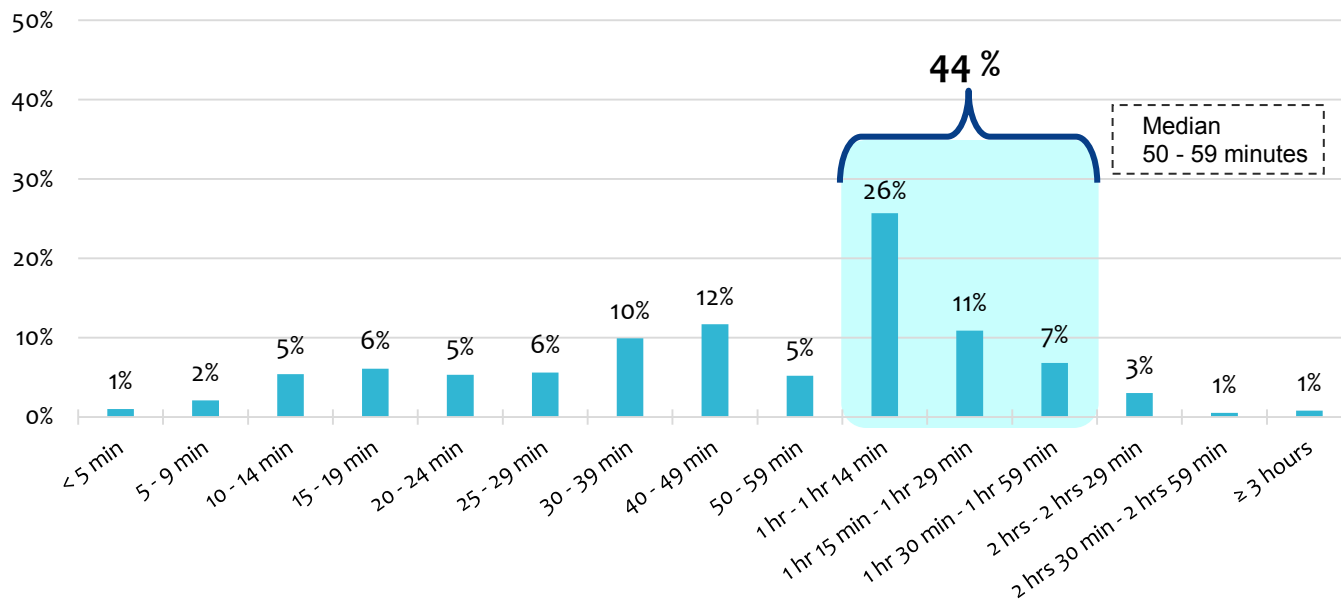
Figure 6. Duration of Commute To Work



Q11. How long does it take you to get to work? | Base: Total Houston employees (n=7672)

- The median time employees spend commuting after work is 50 - 59 minutes.
- One-in-four (25%) travel from work in less than thirty minutes.
- Noticeably more outbound commuters (44%) spend between 1 and 2 hours traveling than inbound commuters (35%).

Figure 7. Duration of Commute From Work

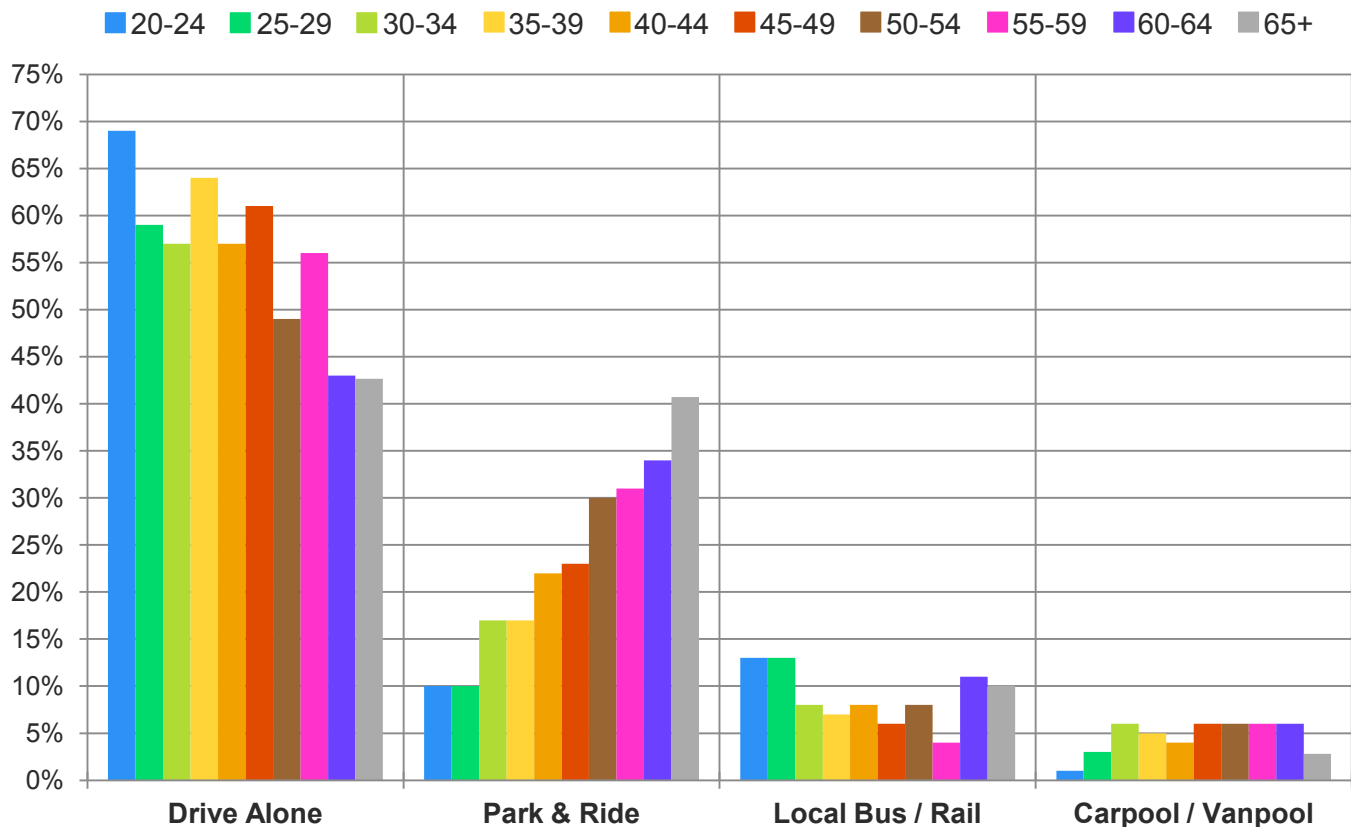


Q15. How long does it usually take you to get from work to home? | Base: Total Houston employees (n=7672)

Generational/Age Differences

Generally, younger Downtown employees travel a shorter distance to work and older employees travel a further distance. While more commuters drive alone, incidence to do so decreases as commuter ages rise. Park & Ride use is highest among older travelers. Local Bus / Rail use is higher among younger travelers.

Figure 8. Primary Commute Mode
By Age Ranges



Q6. How do you usually commute to/from Downtown?

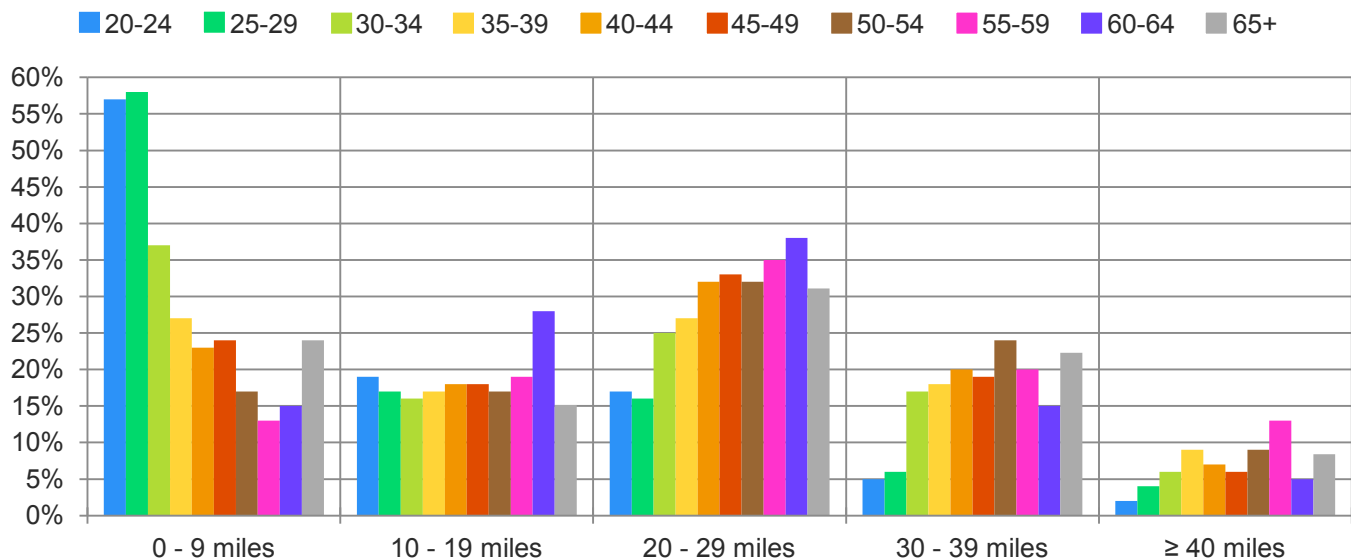
Base: Total Houston employees (20-24 n=306, 25-29 n=879, 30-34 n=972, 35-39 n=1017, 40-44 n=949, 45-49 n=898, 50-54 n=849, 55-59 n=859, 60-64 n=651, 65+ n=238)

Notable effects of age upon commute mode include:

- Significantly more under the age of 50 years-old are drive alone commuters (69% - 57%).
- Park & Ride commuters are more likely to be 50 years-old and older (30% - 34%).
- Ages 20 – 29 are more likely to commute by local bus / rail (13%).
- Car / vanpool use varies the least by age (hovering around 6% between 30 and 65).

As a general trend, younger Downtown employees travel a shorter distance to work and older employees travel a further distance. The only exception to this trend is for those employees who live 10 to 19 miles from their place of employment, which demonstrates a relatively flat trend (16% - 19%) across age groups. The exception is the peak for those ages 60-64 (28%) based 10 to 19 miles from work.

Figure 9. Miles Traveled To / From Work
By Age Ranges



8. How many miles do you travel to work?

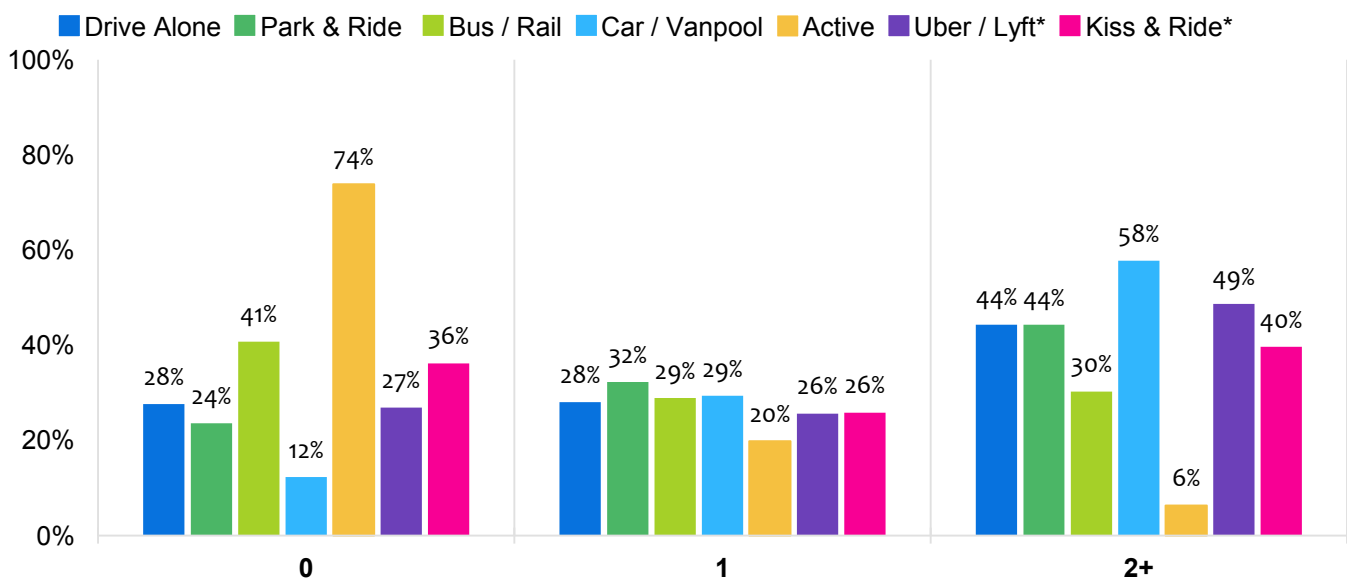
Base: Total Houston Employees (20-24 n=306, 25-29 n=879, 30-34 n=972, 35-39 n=1017, 40-44 n=949, 45-49 n=898, 50-54 n=849, 55-59 n=859, 60-64 n=651, 65+ n=238)

Household composition also influences primary mode of commute. The presence of one child substantially decreases the likelihood of active commuting, and additional children increase the likelihood of car / vanpooling.

The biggest effects are observed in households with 2 or more children:

- Least likely to actively commute.
- Twice as likely to car/vanpool as those with 1 child.
- Increased rates of driving alone.

Figure 10. Number of Children in Household
By Primary Commute Mode



D6. Including yourself, how many people live in your household? Children

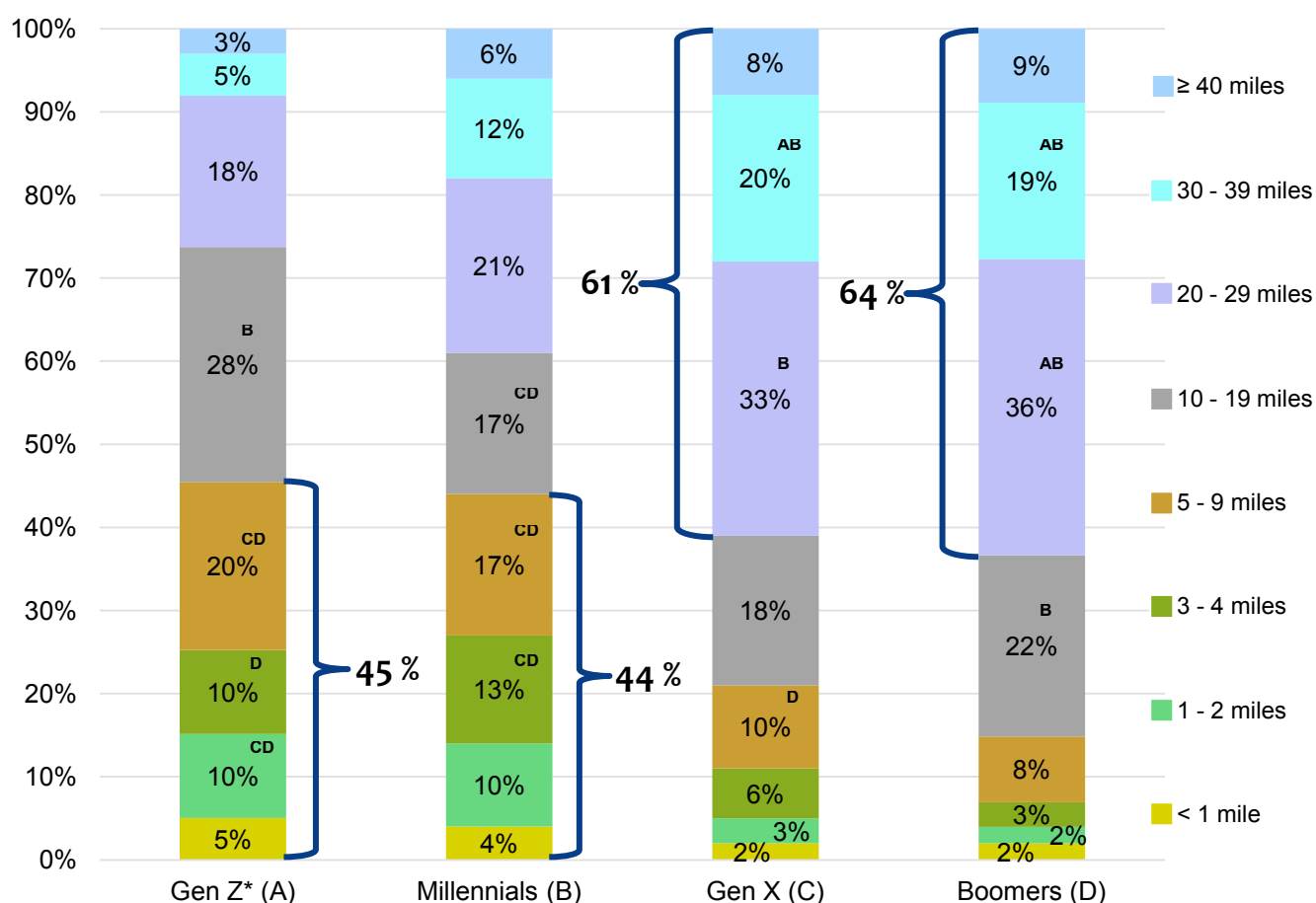
Base: Total Houston Employees/Total Answering (Drive Alone n=2410, Park & Ride n=1194, Local Bus / Rail n=233, Carpool / Vanpool n=285, Active n=75, Uber / Lyft* n=34, Kiss & Ride* n=52) | *Sample sizes less than 100 should be interpreted with caution.

Generational Ages in 2019 are delineated as follows according to the Pew Research Center:

Generation Z	Ages 7 - 22
Millennials	Ages 23 - 38
Generation X	Ages 39 - 54
Boomers	Ages 55 - 73

More than two-in-five Gen Z (45%) and Millennial (44%) Downtown employees live within 9 miles of their place of employment, significantly more than their Gen X and Boomer counterparts. Conversely, significantly more Gen X (61%) and Boomer (64%) employees live 20 or more miles away from work.

Figure 11. Miles Traveled To / From Work
By Generation Classification

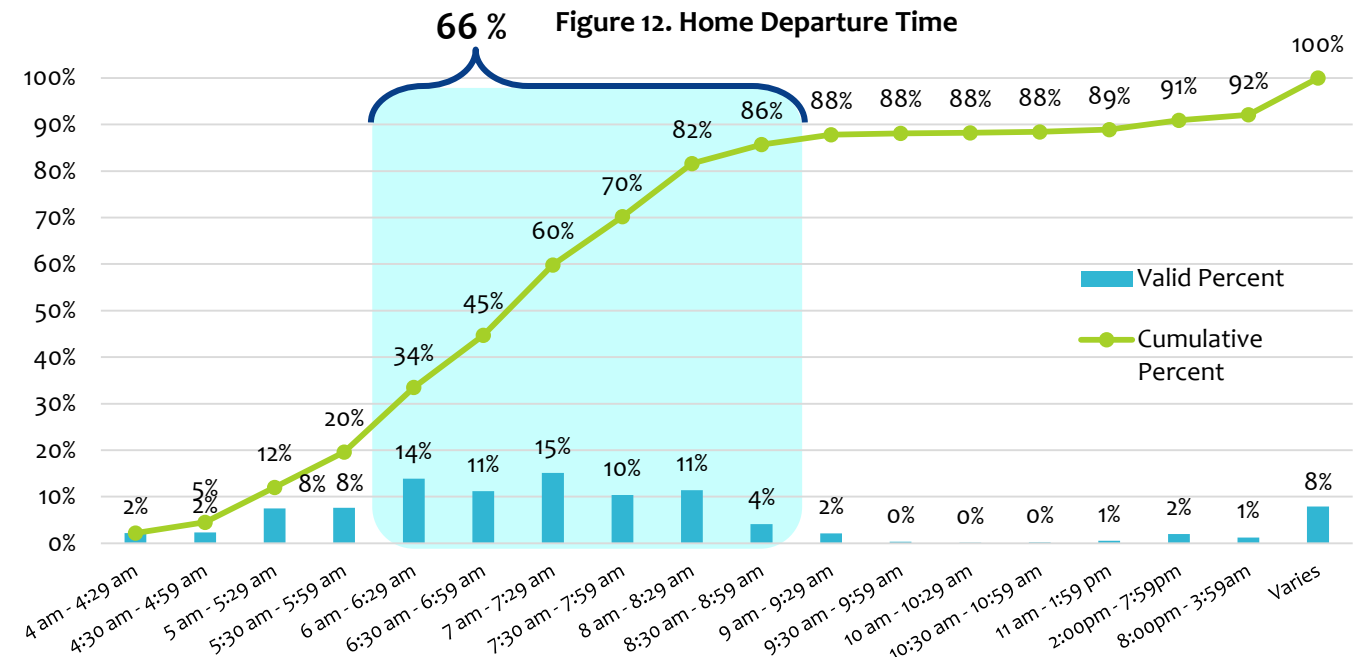


Q8. How many miles do you travel to work? Base: Total Houston employees (Gen Z* n=89, Millennials n=2930, Gen X n=2880, Boomers n=1728) | *Sample sizes less than 100 should be interpreted with caution.

ABCD are significantly greater than corresponding columns at a 95% confidence level.

AM Peak Travel Times

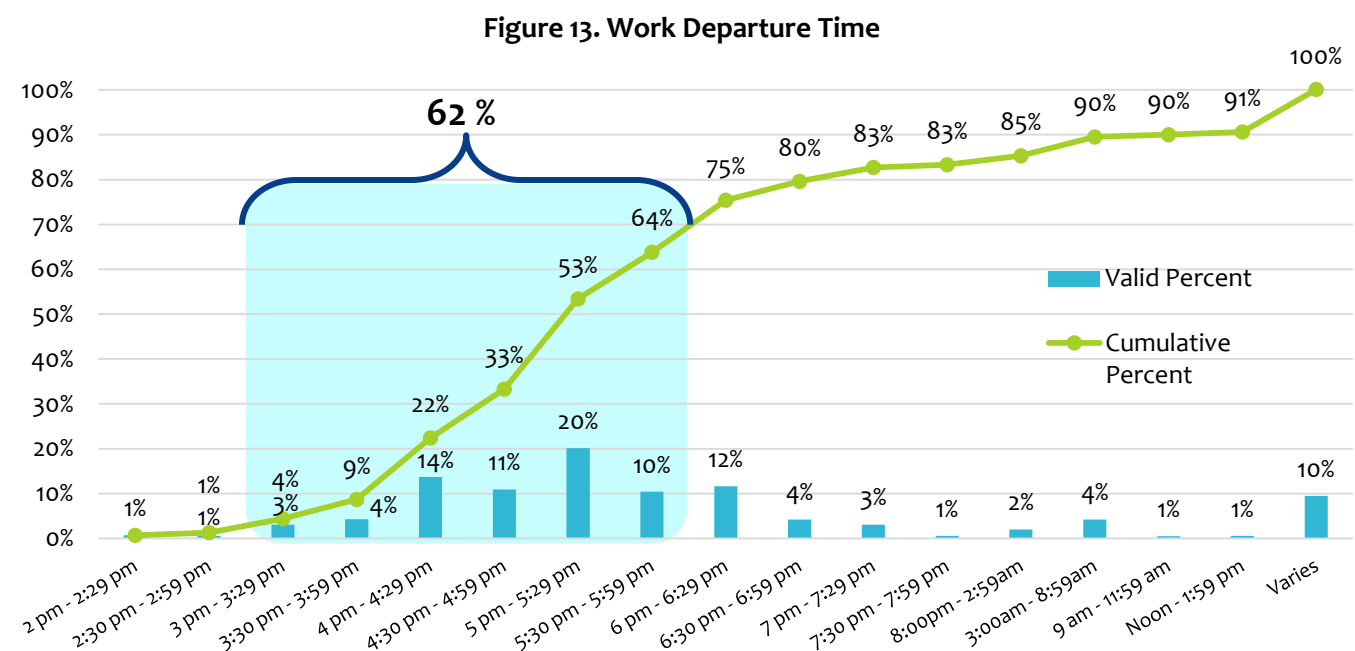
METRO defines the morning peak as 6 am – 9 am. Most (66%) Downtown employees depart home during the morning peak, excluding the 8% whose departure times vary, this leaves 26% routinely traveling outside of peak.



Q10. What time do you usually leave your home to go to work? Base: Total Houston employees (n=7672)

PM Peak Travel Times

METRO defines the evening peak as 3 pm – 6 pm. Most (62%) Downtown employees depart work during the evening peak, excluding the 10% whose departure times vary; this leaves 28% routinely traveling outside of peak.



Q14. What time do you usually leave work? Base: Total Houston employees (n=7672)

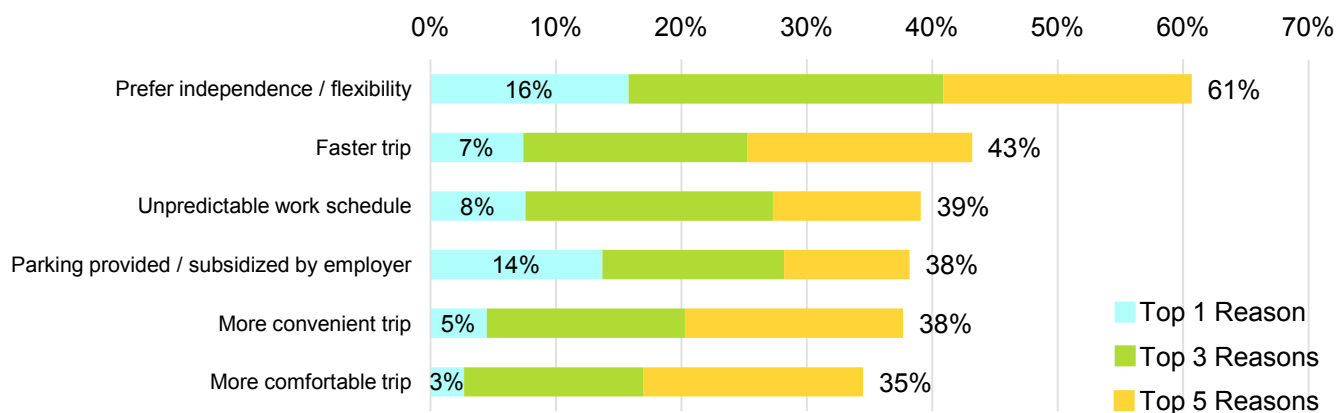
Mode Choice Motivation

Survey respondents were offered menus of possible motivations for choosing their primary commute mode with the objective of ascertaining which factors govern people's mode decisions.

Motivation for Drive Alone Commuters

The top reason that single-occupancy vehicle (SOV) commuters indicate they drive alone is that they have no other way to get to work (17%), followed by preference for independence and flexibility (16%), and that parking is provided or subsidized by employer (14%). Most respondents included their preference for independence and flexibility (61%) in the top 5 reasons they primarily choose to drive alone to work.

Figure 14. Top Reasons: Drive Alone



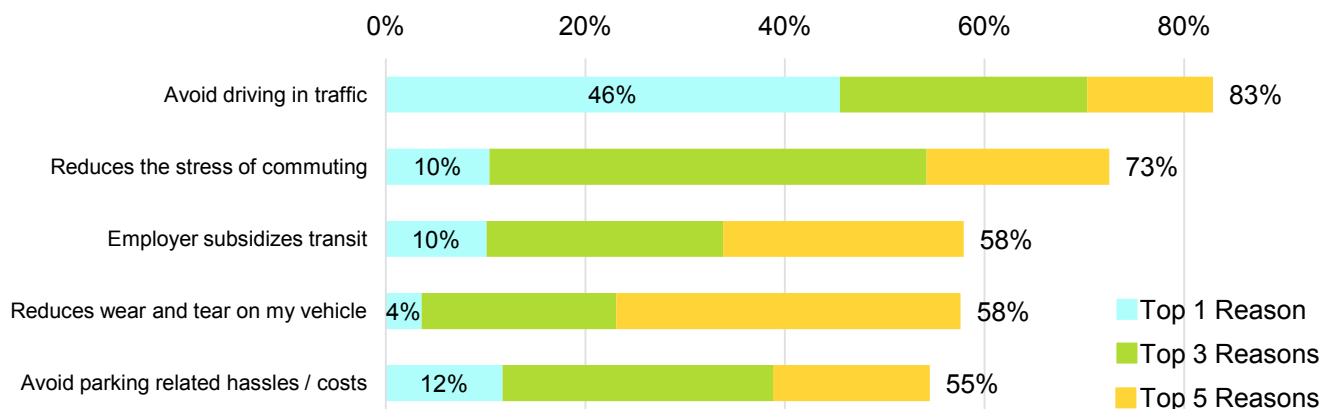
Q24. I drive alone because of the following:

Base: Total Commuters to Downtown Houston Who Primarily Drive Alone (n=4344)

Motivation for Park & Ride Commuters

The primary motivation for selecting Park & Ride among commuters who opt for this mode is to avoid traffic, with nearly one-half (46%) selecting avoiding traffic as their top reason. Furthermore, the majority of Park & Ride commuters (83%) included "avoid driving in traffic" in their top 5 reasons for selecting the service. Three-quarters (73%) also specified reducing the stress of commuting as one of their top 5 reasons for using Park & Ride.

Figure 15. Top Reasons: Park & Ride



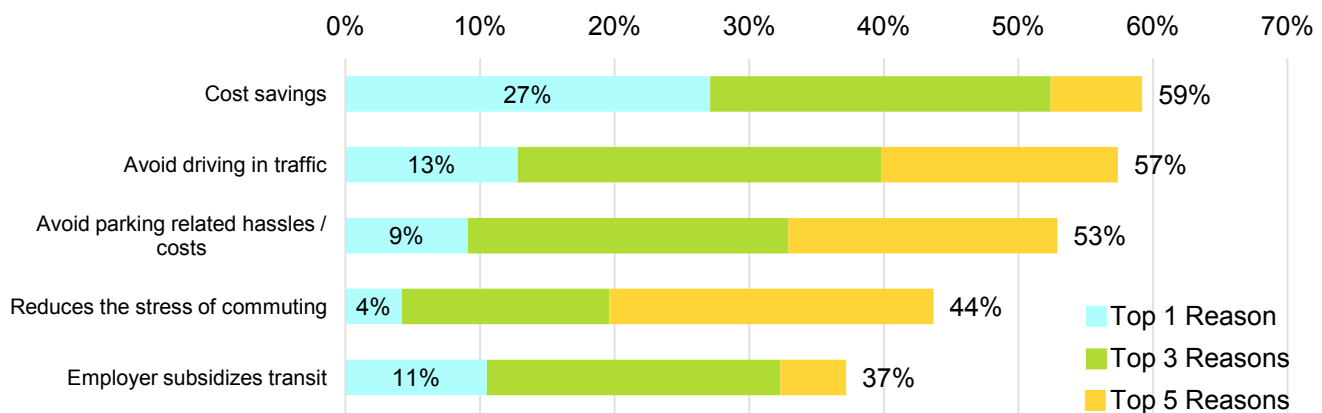
Q39. I take Park & Ride because of the following:

Base: Total Commuters to Downtown Houston Who Primarily Commute by Park & Ride (n=1972)

Motivation for Local Bus / Rail Commuters

Cost savings is the most reported top motivator for choosing to commute to Downtown by local bus / rail, both as the top reasons (27%) and as one of commuters' top 5 reasons (59%). Other top five motivations included avoiding traffic (57%), avoiding parking related inconveniences and costs (53%), reduces stress (44%), and employer subsidies (37%).

Figure 16. Top Reasons: Local Bus / Rail



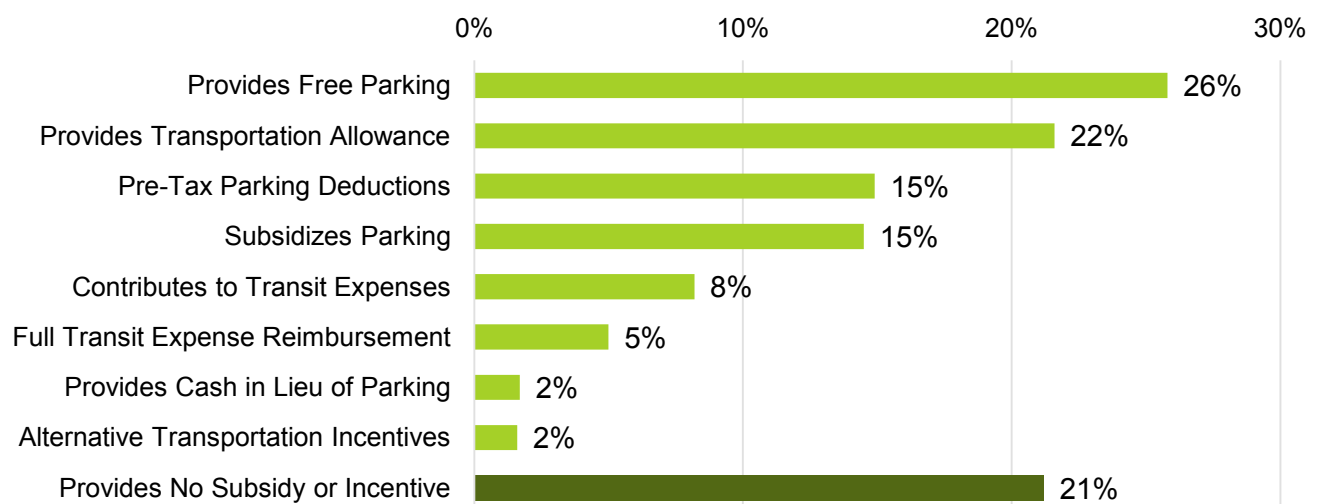
Q32. I take the local bus / rail because of the following:

Base: Total Commuters to Downtown Houston Who Primarily Commute by Local Bus / Rail (n=466)

Employer Incentives

The majority of Downtown employees (79%) receive an employer-provided transportation incentive of some type. Most commonly: free parking (26%), a transportation allowance (22%), followed by pre-tax parking deductions or parking subsidies (15% each).

Figure 17. Employer-Provided Incentives**



Combo Table / Summary Table (A25 / B33 / C40 / D48 / E54 / F59 / G65 / H71 / I76 / J79 / K84 / L86)

Q25. How does your employer subsidize your commute? Base: Total Downtown Houston employees (n=7672)** | **Note, only responses garnering 2% or more are displayed here; not all incentives were asked of every respondent, determined by their primary commute modes.

Employer Incentives by Industry

Notable employer offers by industry include:

- Most employed in Energy (91%) or Utilities (96%) receive employer-provided commute benefits while fewer in Consulting (57%) receive any employer-provided subsidies or incentives.
- Utility workers are most likely to receive a transportation allowance (40%), subsidized parking (22%), or employer contributions to transit expenses (21%).
- Most industries offer free parking, especially Education (52%), Non-profit (52%), Leisure / Hospitality (48%), and FIRE industries (46% Finance, Insurance, and Real Estate).
- Accounting (35%) and Consulting (24%) are significantly more likely to receive pre-tax parking deductions from their paycheck.
- Those in IT (Information Technology) or the Legal industry are most likely to receive a transportation allowance (IT, 27%; Legal, 31%) or subsidized parking (IT, 10%; Legal, 23%). IT is most likely to receive cash in lieu of a parking spot (11%).

Primary Commute Mode by Industry

While most employees within each industry drive alone, primary commute modes within individual industries vary. The most notable differences include:

- Utilities employees drive solo (45%) or take Park & Ride (43%) at near equal rates.
- Aside from Utilities, the industry with the highest share of Park & Ride commuters is Energy (33%).
- In IT, after SOV, the commute mode most used is Park & Ride (21%), followed by a relatively even distribution across local bus / rail (8%), carpool / vanpool (10%), and Uber / Lyft (7%).
- Most Leisure / Hospitality (75%) employees are drive alone commuters. The second most common commute mode for Leisure / Hospitality workers is local bus / rail (15%).
- A higher proportion of Non-Profit employees are local bus / rail (15%) or active commuters (12%) relative to other industries.

The most common work schedule across industries is a traditional 5 day, 40 hour structure. However, Energy workers are most likely to work a 9 / 80 schedule (57% work eight 9-hour days, one 8-hour day, and one day off in a 2-week period).

Table 2. Work Schedule
By Industry

	Accounting (A)	Architect / Engineer (B)	Consulting (C)	Energy (D)	FIRE (E)	IT (F)	Legal (G)	Leisure / Hospitality (H)	Utilities (I)	Education (J)	Non- Profit (K)
5 / 40	82% BDFIJ	65% D	76% DFIJ	36%	83% BDFIJ	61% D	78% BDFIJ	78% DFIJ	55% D	55% D	87% BDFIJ
9 / 80	3%	19% ACEGHK	2%	57% ABCEFGHIJK	7% AC	21% ACEGHK	4%	6%	26% ACEGHK	16% ADFIJ	0%
4 / 10	3%	5% E	6% E	4% E	1%	11% ADEH	5% E	1%	12% ACDEGHK	18% ABCDEGHK	-
3 / 12	1%	6% ACDGI	-	1%	6% ACDGI	5% ACDGI	1%	4% CD	1%	-	-
Other	11% DEFI	5%	16% BDEFI	3%	3%	2%	13% BDEFI	11% DEF	5%	12% DEF	13% DEF
N =	960	253	297	3382	538	237	556	225	584	90	97

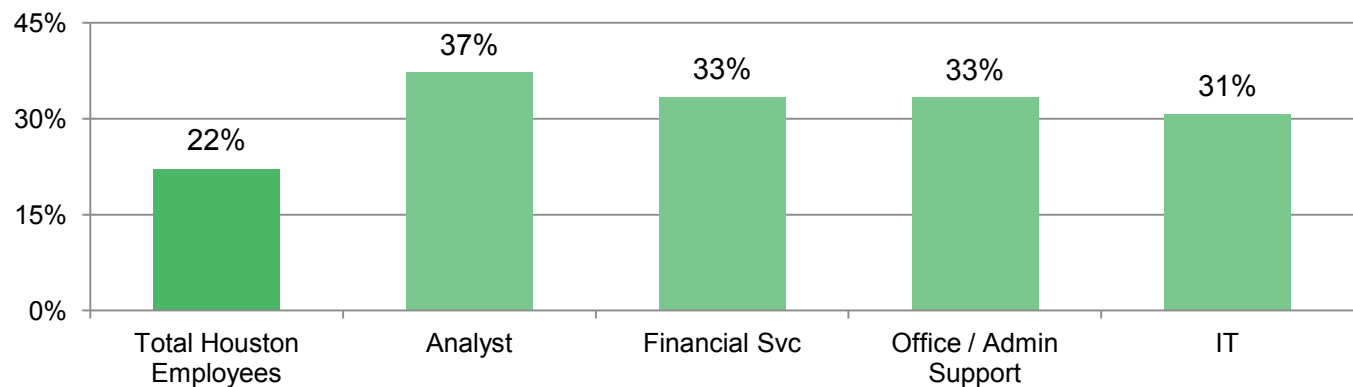
Q7. Which of the following best describes your work schedule?
ABCDEFGHI indicates significant differences at a 95% confidence level.

Transit by Top Occupations

Downtown employees were provided with a list of 32 occupations from which to select the one that best describes their work. The most common responses were Office / Admin Support (15%), Accountant / Auditor (13%), followed by Information Technology (11%). Among those occupations with 100 or more respondents, the following charts show occupations, which represent a significantly greater proportion, by primary commute mode.

While the majority of employees in the following occupations drive alone for their primary commute mode, significantly more respondents in the following occupations take Park & Ride than in other occupations: Analyst (37%), Financial Services (33%), Office / Administrative Support (33%), and Information Technology (31%).

Figure 18. Primary Commute Mode: Park & Ride
By Top Occupations

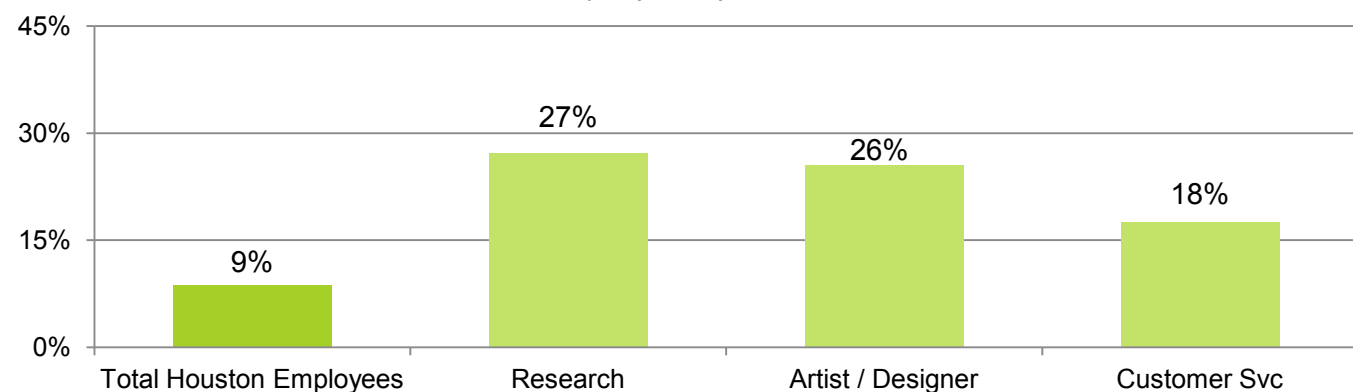


Q6. How do you usually commute to/from Downtown?

Base: Total Houston employees (Total n=7672, Analyst n=687, Financial Svc n=326, Office / Admin Support n=872, IT n=794)

Although only one-in-ten Downtown employees (9%) primarily commute by local bus / rail, significantly more employees in Research (27%) and in creative occupations like Artists, Designers, Media and Performance Art (26%) travel by this mode of public transportation. A considerable share (18%) of respondents employed in Customer Service also take local bus or rail transit.

Figure 19. Primary Commute Mode: Local Bus / Rail
By Top Occupations



Q6. How do you usually commute to/from Downtown?

Base: Total Houston employees (Total n=7672, Research n=90, Artist / Designer n=92, Customer Svc n=132)

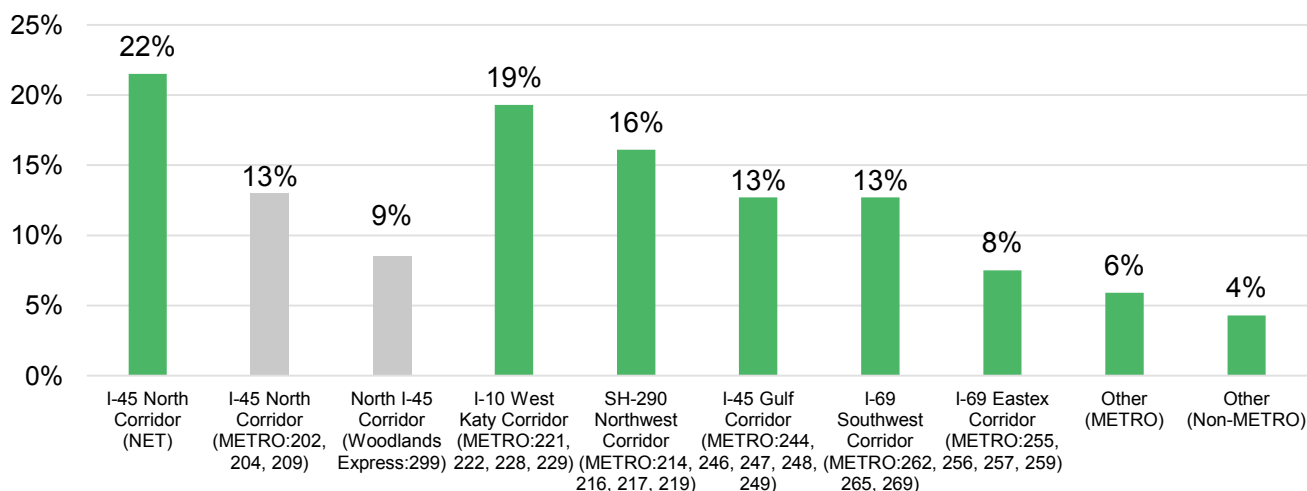
Significant findings for remaining commute modes based on occupation:

- Just 5% of total Downtown employees commute by carpool or vanpool, but twice as many Analysts (10%) and three times as many engaged in Real Estate (15%) share rides to work.
- Only 3% of Downtown workers walk or bike to work; however, Architects (14%) and Attorneys / Legal Practitioners (11%) are significantly more likely to actively commute than other occupations.
- Few Downtown employees (2%) take an Uber or Lyft as their primary commute mode, but Consultants (5%) and those in Transportation (6%) are more likely to opt for this mode, albeit by a small percentage.

Park & Ride Corridors

The highest number of Downtown commuters utilizing Park & Ride travel along the following corridors: I-45 North Corridor (22%, I-45 North Corridor NET), I-10 West Katy Corridor (19%), followed by SH-290 Northwest Corridor (16%), with the I-45 Gulf Corridor and I-69 Southwest Corridor tied for fourth (13%), with the I-45 Gulf Corridor and I-69 Southwest Corridor tied for fourth (13%), with the I-45 Gulf Corridor and I-69 Southwest Corridor tied for fourth (13%).

Figure 20. Primary Park & Ride Corridors Utilized



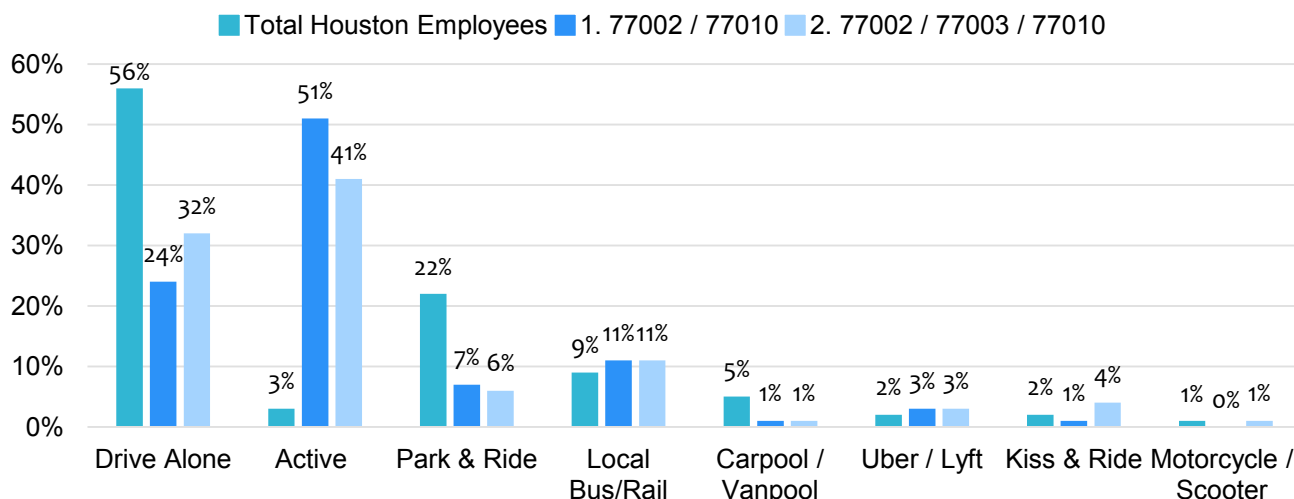
Q38. I usually travel to work using the following Park & Ride Service:

Base: Total Commuters to Downtown Houston Who Primarily Commute by Park & Ride (n=1972)

Downtown Residents

Downtown residents are defined as individuals residing in one of three primary Downtown ZIP codes – 77002, 77003, and 77010. Four-percent of Downtown employees live in one of the three primary Downtown ZIP codes. Primary commute habits across two ZIP code groupings (1. 77002+77010, 2. 77002+77003+77010) revealed residents from these ZIP codes are much more likely to actively commute by walking or biking and less likely to drive alone or take Park & Ride than the general Downtown employee population. Despite their proximity to Downtown, a considerable number drive alone (24%, 1. 77002+77010; 32%, 2. 77002+77003+77010).

Figure 21. Primary Commute Mode
By Primary Downtown ZIP Code Groupings



Q6. How do you usually commute to/from Downtown? Base: Total Houston employees (n =7672, 77002 / 77010 n=199, 77002 / 77003 / 77010 n=264)

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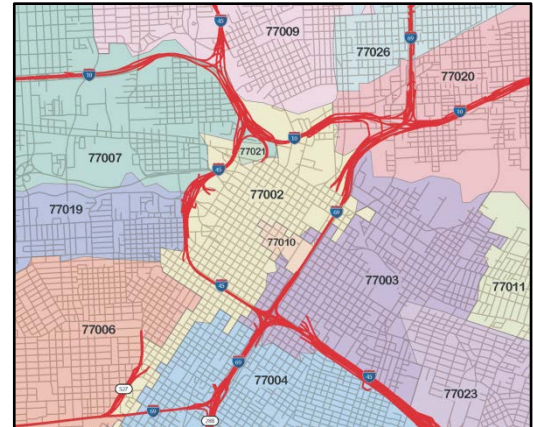
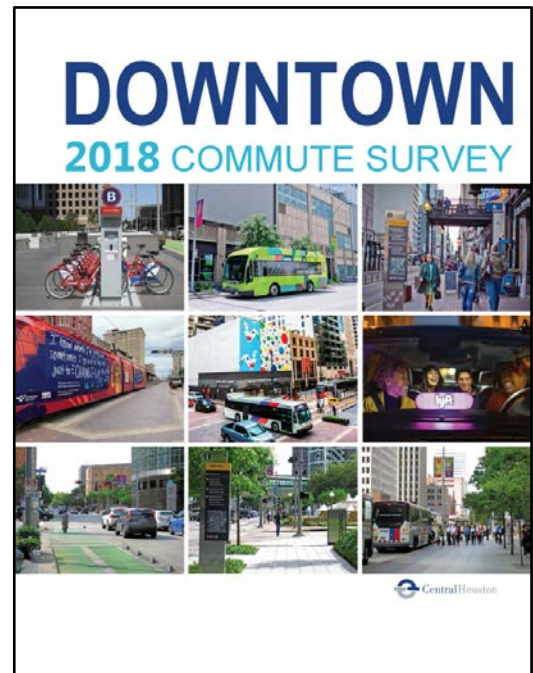
2018 Downtown Commute Survey:

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APPENDIX A: Survey Instrument

APPENDIX B: Maps & Map Definitions



Central Houston, Inc. (CHI) is a private, nonprofit corporation supported by memberships of businesses and institutions with an interest in the urban core. CHI advances the redevelopment and revitalization of Downtown and the central city, catalyzing collaboration and coordinated development through facilitation and leadership.

Downtown and the central core are the heartbeat of the city and the region; their continued health and growth is critical to the success of Houston. This is the guiding principal behind Central Houston, founded by Downtown business leaders to ensure that the center city remains vital and progressive. For more than 35 years, supported by its membership, the organization has collaborated, conceived, and implemented remarkable solutions for the complex challenges of our city. Central Houston's focus is long term and big picture.



CentralHouston

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