DOWNTOWN BURLINGTON EMPLOYEE TRANSPORTATION SURVEY REPORT

June 2008

Prepared for:

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TABLE OF CONTENTS

EXECUTIVE SUMMARY

Between October and December of 2007, the BBA working with CATMA and CCMPO, launched a Downtown Employee Transportation Survey. The survey was designed to assess the commuting habits, costs, challenges and preferences of downtown employees. It also included questions designed to gauge commuter satisfaction and opportunities and their willingness to change commuting habits.

1,351 downtown employees responded, a higher than expected rate of participation.

SURVEY DEMOGRAPHICS

Respondents to the survey were predominantly professional, clerical and office workers who reported keeping a typical full-time office work schedule of 8:00 am to 5:00pm. Nearly two-thirds of respondents were female. Over 80% of respondents live in Chittenden County.

- Three major employers combined for more than 40% of responses
  - The State of Vermont 18%
  - Chittenden Bank 14%
  - The City of Burlington 9%

The remainder of respondents represented a wide variety of downtown employers.

COMMUTING HABITS

More than 70% of respondents reported driving alone to work in a Single Occupancy Vehicle (SOV). About 10% walked and 4% biked to work. Less than four percent reported commuting on either a CCTA (Chittenden County Transportation Authority) bus or PARC Shuttle.

PARKING

Where do Employees Park? Parking habits varied based on whether or not an employee pays for parking. Of those who pay for parking, the top three parking locations reported by respondents were:

- Downtown Garage 43.7%
- On-site at Workplace 14%
- On-street at Meters 11.9%

Nearly 9 in 10 drive-alone commuters reported having NO Trouble finding parking at the start of their work day. Nearly 45% of employers pay for some or all of their employees parking costs.

SATISFACTION WITH COMMUTE

Nearly 90% of respondents reported being somewhat or very satisfied with their commute. Biker and walkers reported the highest level of satisfaction. Those that drive alone and carpool were most likely to report being "Not Satisfied" with their commute.

POTENTIAL FOR CHANGE

Among commuters who drive alone, 64% reported using no other mode of transportation. Commuters who reported biking, walking, and taking the bus were more likely to use other modes. More than 40% of these commuters reported sometimes driving alone.

When drive-alone commuters were asked what other mode of commuting they would try, they were most likely to choose to try the Bus/Transit/Link.

COMMUTING INCENTIVES AND ATTITUDES

Close to 60% of respondents do not receive incentives or services from their employer for commuting to work by modes other than the drive alone mode.

Does Employer Offer Incentive/Service Programs for Using Alternatives to Driving Alone?	
No	57%
Don't Know	18%
CCTA PARC Shuttle	13%
Free Bus Fare	10%

Most drive alone commuters cited added convenience or monetary incentives as having the potential to motivate them to use a Bus/Transit/Shuttle to commute to work. The top three incentives reported were:

Top Three Incentives to Motivate Bus/Transit/Shuttle Use	
Need Bus Stop Within Walking Distance of Home and Workplace	60.2%
Free or Reduced Bus Fare	55.8%
Direct Express Service	53.1%

Among all other commuters, monetary incentive was commonly chosen as having the potential to encourage them to use alternate modes.

CONCLUSIONS AND NEXT STEPS

CATMA and the BBA concluded that the results of the survey indicated the need for further discussion about the formation of a Downtown TMA.

We Need to Learn More: The Downtown Employee Transportation Survey was an important first step. It provided insight into the commuting habits of downtown employees. Employers need to weigh-in to broaden the scope of understanding.

Next Steps: Therefore, BBA and CATMA recommend the formation of an Ad Hoc Board of Directors; a public/private partnership that would examine all sides of the parking and transportation system in downtown Burlington. This group, by learning more, would decide whether Burlington needs to form a Downtown TMA and what would be the mission, vision, goals and aims of such an organization.

Repeat Survey: To gauge changes to commuter habits and attitudes, the BBA and CATMA recommend that the Downtown Employee Transportation Survey be repeated in the fall of 2008.

I. INTRODUCTION

The Burlington Business Association (BBA) is exploring the feasibility of creating a Downtown Transportation Management Association (Downtown TMA). The first important step in determining the need for a Downtown TMA is to obtain benchmark information about downtown employees' current commuting and parking habits, and their opinions about what kinds of alternative commuting modes they would consider.

BBA collaborated with the Chittenden County Metropolitan Planning Organization (CCMPO), Campus Area Transportation Management Association (CATMA) and the City of Burlington to launch the first on-line Downtown Employee Transportation Survey on October 23, 2007. The survey was designed to gauge the current transportation and parking needs of downtown employees. It included a section for respondents to comment about their transportation and parking experiences and opinions. The survey gathered information on how this one user group, downtown employees, experiences Burlington's parking and transportation infrastructure in the course of commuting.

The survey was a first step in taking an in-depth look into the issues, concerns, challenges, and successes surrounding the experience employees have commuting to work in Burlington. This information could be used to determine whether there is a need for, and to set the purpose of a Downtown TMA.

Burlington has multiple groups that use its downtown parking and transportation infrastructure. Each of these user groups places a unique set of demands on the system. This project took a look at employees solely in order to determine if opportunities existed to change their commuting habits. Changing habits of some commuters could have benefits - such as reduced traffic and parking congestion, and lower parking and commuting costs for employees and employers alike, while freeing up more parking for customers and clients in the downtown business district. The results of the survey could prove useful in determining whether a Downtown TMA may be a good next step for the Burlington community.

ABOUT BBA – BURLINGTON BUSINESS ASSOCIATION

For the past 30 years, the Burlington Business Association has been the Voice of Burlington Business. It's more than 200 member businesses work together to advocate for and promote the interests of Burlington businesses. BBA has worked on a variety of projects that support and enhance the economic vitality of Burlington. Its better known projects include: helping to create the Church Street Marketplace; supporting the development of the Free Two-Hour and Holiday parking programs; supporting the creation of the Free College Street Shuttle; helping secure passage of the Moran referendum; organizing the Community Outreach Program; among others. The BBA has a long history of working with the business community and the City of Burlington to create positive change. Our mission is to enhance and promote the economic vitality of Burlington and to assure that the City of Burlington continues as the cultural, social, political, educational, and economic center of northwestern Vermont. For more information on the BBA visit www.bbavt.org.

ABOUT CATMA – CAMPUS AREA TRANSPORTATION MANAGEMENT ASSOCIATION

CATMA, a non-profit employer-based organization, was formed in 1992 to enable its members [American Red Cross, Champlain College, Fletcher Allen Health Care, and University of Vermont] to share resources as well as jointly plan, develop and manage all transportation and parking programs, infrastructure and associated facilities. In order to help reduce the cost of commuting and parking, traffic congestion, and air quality in the "Hill" section of Burlington, Vermont, CATMA provides commuting options, services and programs to employees at its member institutions. For more information on CATMA, please visit www.uvm.edu/~catma.

II. SURVEY OVERVIEW

CREATION

When the BBA expressed an interest in conducting a Downtown Employee Transportation Survey it turned to CATMA. CATMA suggested working in conjunction with Resource Systems Group. CATMA has conducted for its member institutions an annual on-line Fall Employee Transportation Survey since 2000 and an annual on-line Spring Student Transportation Survey since 2003. Resource Systems Group offers professional on-line employee survey services. CATMA and Resource Systems Group brought together the necessary knowledge and experience with on-line employee and transportation surveys to help the BBA make this effort a success.

BBA and CATMA worked with Resource Systems Group to create the content and logic of the survey. BBA and CATMA wanted a survey that was easy to understand and complete. They also wanted to engage respondents so that they would complete the survey, which could take 20 minutes or more. Finally, they wanted to be sure to gather the necessary information to meet their goals. BBA, CATMA and Resource Systems Group worked together to create the survey. Resource Systems Group then completed the task of preparing the survey to go live, on-line.

In order to provide employees who might not have access to a computer at work or home with an opportunity to complete the survey, BBA and CATMA hosted tabling events in downtown Burlington which were promoted through contact with BBA member businesses and the Church Street Marketplace. Both tabling events were held at the Burlington Town Center at Starbucks Café. They were held on November 7-8, 2007.

OBJECTIVES

The Downtown Employee Transportation Survey had several objectives which could be achieved through data collection and analysis. The primary objective was to understand how employees commute into Burlington, what were their commuting habits and patterns; and how circumstances, objectives, prejudices, and information influence their commuting habits. Specifically the survey was designed to:

- Determine current commuting and parking behavior of downtown employees;
- Establish benchmark data on commuting and parking habits;
- Investigate the effects of population and company demographics on commuting and parking habits;

- Elicit suggestions about and interest in alternate commuting.

CONTENTS

The survey contained more than 20 unique questions and up to a total of 37 questions (1). The number of questions a respondent was asked to answer depended upon their commuting practices, with drive alone commuters being asked the largest number of questions. BBA and CATMA wanted to understand the patterns, habits, and opinions of this group because changing their commuting patterns could be a focus for a Downtown TMA.

The survey had the following content areas:

- Personal and professional demographics;
- Working patterns [schedule, stops to/from work];
- Current commuting and parking practices;
- Assessment of cost, time, challenges [commuting and parking];
- Satisfaction with current commute;
- Transportation options & incentives;
- Impact of incentives on transportation patterns;
- Comments.

CONFIDENTIALITY

In order to ensure the confidentiality of respondents' data, the survey was completely confidential. A randomly generated password list was correlated with password survey letters. Although a password was required to complete the survey, there was no link to the respondent. These letters were randomly distributed to employees and businesses by the BBA.

INCENTIVES

Survey participants had a chance to enter their name into a drawing to win one of many $25 gift certificates redeemable at various downtown shops and restaurants just for completing the survey. The drawing was administered by creating a separate file where participants were required to enter their name and contact information (phone number/email). Information entered into this separate data file was not linked to the data respondents entered in survey.

86% of respondents entered their name for the gift certificate drawing.

In January 2008, the BBA received from CATMA a list of drawing entries. A random number generator software application was used to select the winner. The BBA contacted the winners and issued 14 gift certificates in

[1] See Appendix I for sample pages from the Downtown Burlington Employee Transportation Survey

the amount of $25 redeemable at various shops and restaurants in downtown Burlington. (Two winners did not reply to the BBA's contact attempts).

DISTRIBUTION

The survey was promoted to businesses and employers with work sites in the downtown business district. BBA contacted a point person at major employers, BBA member organizations and at other businesses to inform them of the survey. The employers provided the BBA with a count of the number of employees at their work site. The BBA then issued that number of survey passwords.

In an effort to spread the word about the survey and distribute passwords, the BBA held an informational meeting at the Hilton Hotel in Burlington on October 18, 2007. During this meeting, a panel consisting of the BBA, CCMPO, and CATMA presented an overview of TMAs, the survey process, and the survey's goals. At this meeting, those present were provided with a stack of survey password letters to bring back to their businesses and distribute as appropriate. Twenty-five business representatives attended this meeting.

A link to the on-line survey was posted on the BBA website. Respondents could access the on-line survey via this web-link at which point they were required to enter a password from their survey letter.

The BBA sent several emails in November and December 2007 to employers and businesses reminding them of the importance of the survey and prompting their employees to participate.

The BBA, with the support of CATMA, offered on-line access to the survey for downtown employees at a kiosk set-up at Starbucks at Burlington Town Center. The goal was to reach out to downtown employees who may not have access to the internet at work or home.

TIMELINE

Milestones from the Survey Process – January 1, 2007 to December 19, 2007	
January 9, 2007	BBA Downtown Action Group (DAG) topic "Transportation and CATMA"
June 2007	BBA newsletter mentions exploration of Downtown TMA
August 24, 2007	BBA Scope of Services submitted to CCMPO
September 6, 2007	BBA membership meeting held at UVM – topic "Transportation 2007"
September 20, 2007	CCMPO Grant contract for downtown survey approved
October 18, 2007	BBA Informational meeting for employers/businesses – survey password letters distributed
October 23, 2007	Press conference held in Burlington Town Center
November 7-8, 2007	Tabling events hosted by BBA/CATMA at Starbucks
December 14, 2007	Last push to employees to complete survey
December 19, 2007	Survey closed

III. SURVEY FINDINGS/ANALYSES

SURVEY RESPONSE

There were approximately 5,000 password letters distributed. The survey was completed by 1,351 employees, resulting in a 27% response rate.

The average length of time to take the survey was approximately 18 minutes.

Three major downtown employers[2] participated in the survey.

Employer	% of Survey Respondents	Total # of Employees in Downtown District
State of Vermont	18.1%	570
Chittenden Bank	13.9%	553
City of Burlington	8.6%	340

The response to the survey was higher than anticipated.

2 Note: Fletcher Allen Health Care and the University of Vermont collectively account for a major downtown employer. These institutions, as members of the Campus Area Transportation Management Association, are surveyed by CATMA annually (data available at CATMA).

SURVEY DEMOGRAPHICS

A majority of respondents were females who reported working full-time and being between 25 and 54 years of age. They kept a typical Monday to Friday daytime schedule. Respondents predominately classified their work as professional/technical and office/clerical. Over 80% of respondents indicated that they live in Chittenden County. Detailed figures of respondent demographics appear below.

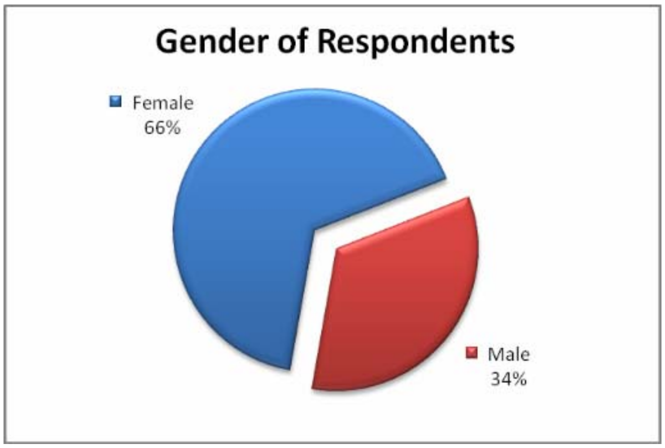

FIGURE 1

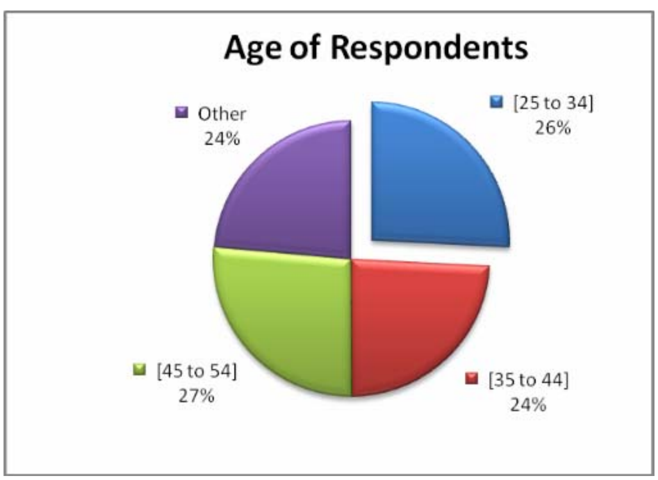

FIGURE 2

County of Residence: Employees living in seven counties of Vermont responded. The majority of respondents were from Chittenden County.

County of Residence	% of Respondents
Chittenden County	81.6%
Franklin County or north	6.5%
Addison County or south	4.4%
Washington County or southeast	3.5%
Grand Isle County or northeast[3]	2.3%
Lamoille County or east	1.3%
New York or west	0.4%

Hours of Work: Over 90% of respondents were full time workers

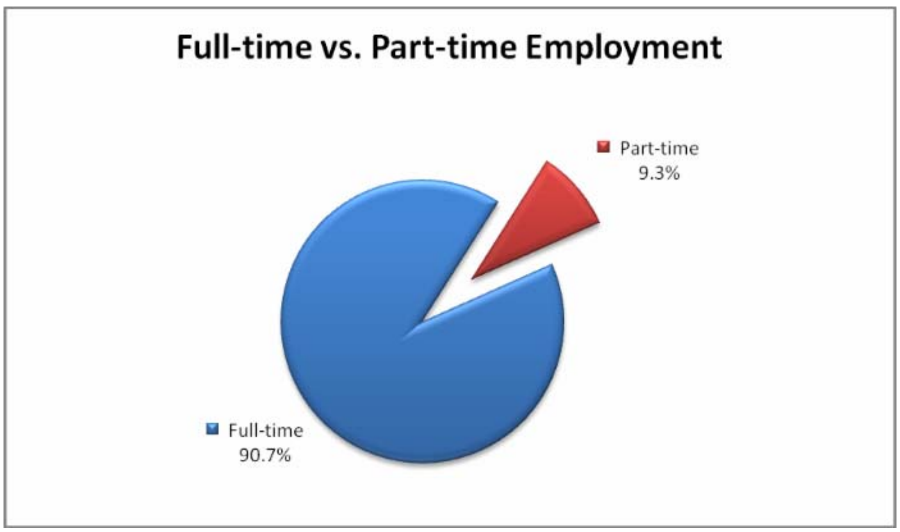

FIGURE 3

Type of Work: Most respondents were office workers; with over 55% indicating that they were professional, technical, clerical or support workers. Of the 22% of respondents that selected other, many of them indicated

[3] This selection is reported as listed in the Downtown Employee Transportation Survey. The Survey had a typographical error and should have read "Grand Isle County or northwest.

through comments that they held office jobs such as accounting, administration, insurance agents and marketing. Overall most respondents reported doing some form of office work.

Type of Work	% Response
Professionals/technical workers	35.9%
Support/clerical workers	22.1%
Other [4]	18.1%
Management	17.0%
Retail sales	5.0%
Food service/restaurant	1.1%

Years of Service Working in Downtown Business District: Most respondents have worked in the downtown business district for more than 5 years.

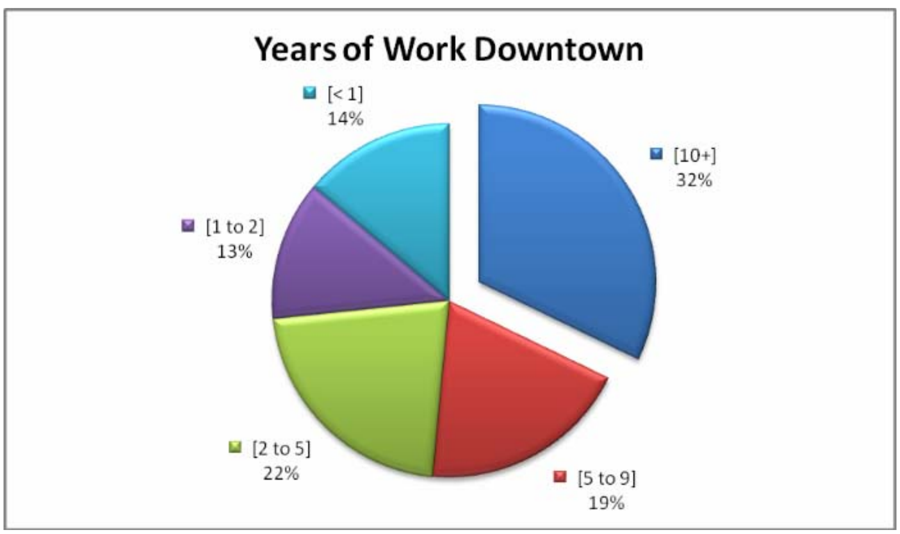

FIGURE 4

***Employer Location*:** Of the employers represented in the survey over 85% are located within the Burlington Central Business District. For a list of employer locations please see Appendix II:1.

[4] *Note:* Some of the "Other types of workers" included: accountants, administrative, fitness/lifeguard, arts, case manager, social worker, state employees, IT/Tech, telecommunications, theater, corrections, probation officers, public health, real estate, retail, court workers, customer service, graphic designers, education, financial, hair stylists, hotel, housekeeping, human services, insurance agents, law enforcement, legal, library, marketing, non-profit, maintenance, police.

Vehicles per Household: Survey respondents reported on the number of vehicles in their household that are available for commuting. On average, 35% of respondents reporting having one car available for commuting, 57% reported having two cars. Only a small number, less than one percent on average reported having no car available, with by far the largest number of that group being in Chittenden County. The survey indicates that respondents have vehicles readily available for commuting.

Commuting Vehicles per Household by County

County/Location	Total Respondents	# of Vehicles Available in Household for Commute			
		None	One	Two	Three
Chittenden	1103	4%	45%	43%	8%
Franklin	88	2%	24%	67%	7%
Addison	60	2%	33%	62%	3%
Washington	47	2%	30%	55%	13%
Grand Isle	31	-	39%	48%	13%
Lamoille	17	-	53%	41%	6%
New York	5	-	20%	80%	-

CURRENT COMMUTING BEHAVIOR

Modes of Transportation: Most respondents reported that they commute to work in a personal single occupancy vehicle (SOV). Slightly more than four percent of employees reported commuting to work either on board a CCTA Bus or the PARC Shuttle. About 10% reported walking and 4.3% reported bicycling to work. The Other[5] category consisted mainly of employees who used a personal vehicle for some portion of their commute.

[5] Other modes of travel included: drive alone half way after dropping child off at school; bike in summer-drive in winter; bus & bike depending on weather; car; carpool & shuttle; carpool in winter-drive alone in summer; drive with someone; drive alone and walk; drive in with my spouse; drive in w/children; drive myself; combination of drive alone-carpool-LINK; walk-bike-scooter-car.

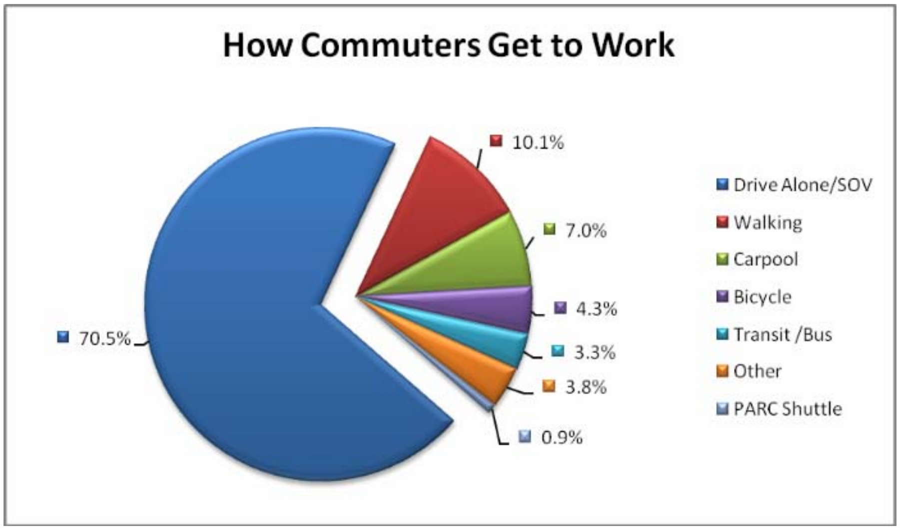

FIGURE 5

***Arrival Time to Work*:**[6]

Weekdays: Most respondents who reported working a Monday to Friday work week; reported arriving at work between the hours of 7:30am and 8:59am.

Weekends: Most respondents who reported working weekends; reported arriving at work between the hours of 9:00am and noon.

Departure Time from Work:[7]

Weekdays: Most respondents who reported working a Monday to Friday work week; reported leaving work between the hours of 4:30pm and 6:00pm.

Weekends: Most respondents who reported working weekends; reported leaving work between the hours of 5:00pm and 6:30pm.

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[6] Respondents completed a table indicating arrival times at work. Arrival times reported ranged from 4:30am up to midnight. Only a small percentage of respondents indicated arrival times outside the 7:30 to 8:59am time frame for weekdays and the 9:00am to 12:00pm time frame for weekends.

[7] As with arrival times, only a small percentage of respondents indicated departure times outside the respondent norm.

Commuting Time: Respondents reported that on average their commutes took less than 30 minutes. Relatively few respondents commuted for more than 45 minute. Commute times TO work were roughly the same as commute times FROM work.

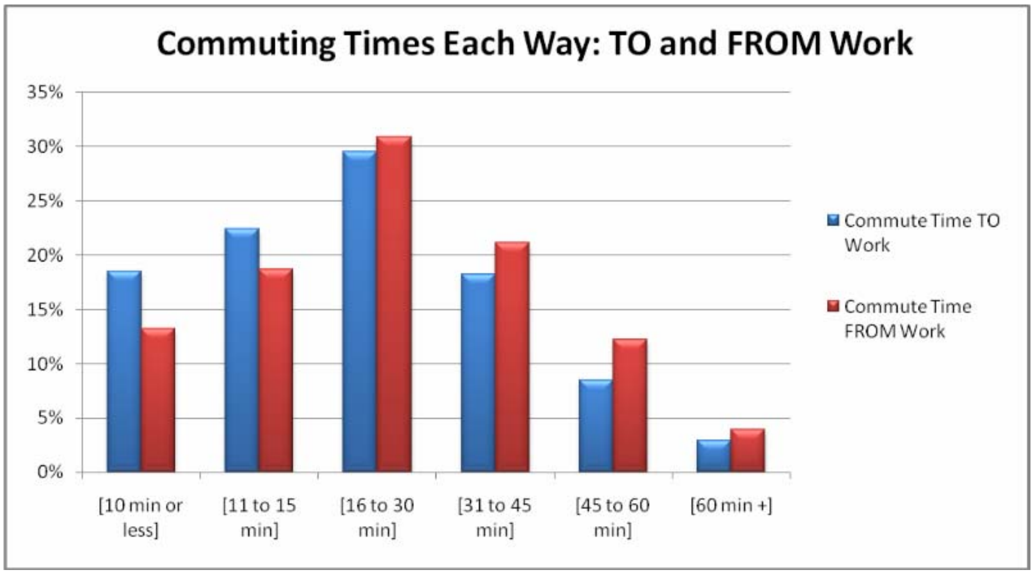


FIGURE 6

Nearly 70% of respondents reported that their commute TO work took 30 minutes or less; with 40% reporting a commute of 15 minutes or less. About three percent of respondents reported that their commute took one hour or more.

Commuting Routes Used: Respondents were asked to report which major routes they used to commute to work. The four most common routes selected include:

- 87.0% Main St/Williston Road;
- 86.4% I89;
- 85.2% Pearl Street/Colchester Avenue;
- 82.8% Shelburne Road.

For this survey question, respondents were asked to "check all that apply". This survey response indicated that routes from several directions into the downtown district are heavily used. For complete survey results please see Appendix II:2.

Commuting Habits of Bus Riders: Most respondents who commute by bus reported using the Link Route. This despite the fact that employers who pay for their employees to ride the Link Route (UVM, Champlain College, Red Cross, and Fletcher Allen Health Care) were not a part of this survey group. Shelburne Road and North Ave. were the next most used routes. A small number of commuters reported using a shuttle service to get to work; 6.1%. Of those, most reported using the CCTA PARC Shuttle. Respondents that reported using the PARC Shuttle were primarily Chittenden Bank employees.

A small number of respondents reported using the Free College Street Shuttle to commute TO work. Nearly 84% of respondents reported never using this shuttle during the work day after arriving to work. Over 90% of respondents do not use a shuttle to get to work. This survey question allowed respondents to "check all that apply".

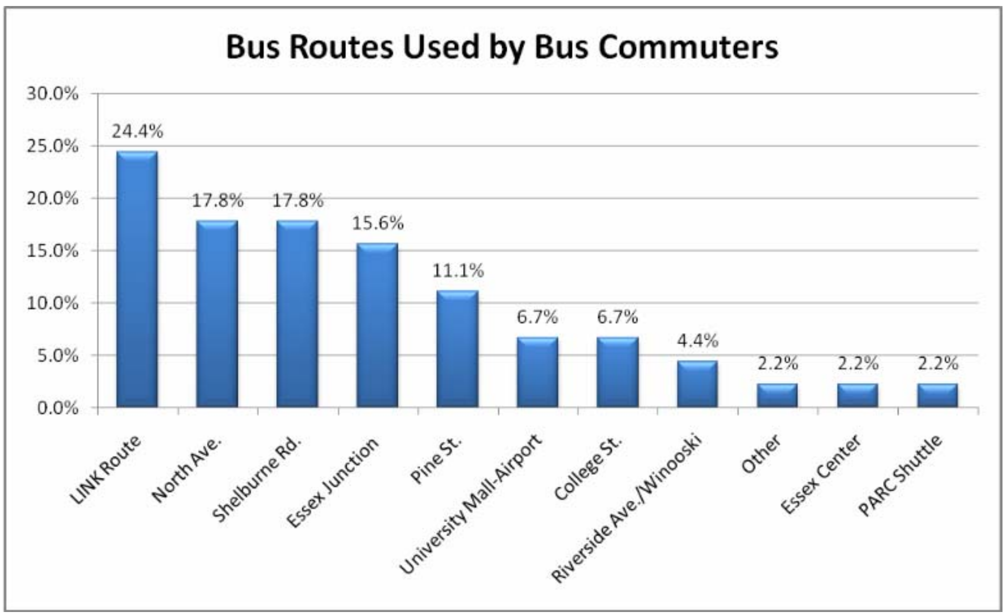


FIGURE 7

Employer Impact on Primary Mode: There was some variation in the how employees commute to work when one looks at their employer. Chittenden Bank employees were more likely to use a Bus/Shuttle. Chittenden Bank provides incentives for employees that ride on the PARC Shuttle. The number of drive alone commuters employed by the State of Vermont and the City of Burlington was above average. The State of Vermont and the City of Burlington provide paid or free employee parking.

Modes of Commuting by Employer

Employer	Commuting Mode			
	Drive Alone	Bus/Shuttle	Walk/Bike	Other
Chittenden	69.1%	11.2%	5.9%	6.4%
State of Vermont	77.9%	4.5%	7.4%	3.3%
City of Burlington	74.1%	2.6%	12.1%	4.3%
All Other[8]	68.1%	2.7%	18.8%	3.4%

Carpooling rates are approximately seven percent for respondents and do not change by employer. For detailed data on primary modes of commuting by employer see Appendix II:3.

CURRENT COMMUTING CONDITIONS

Traffic Concerns for Commuters: Respondents reported various experiences with the affects of traffic on their commute TO and FROM work. Traffic on the trip FROM work was reported as having a stronger affect on commuters than traffic on the trip TO work. Of respondents, over 50% reported that traffic had a stronger than average affect on their typical commute FROM work; 17% more than for the commute TO work.

Affect of Traffic on a Typical Commute Day:
[Based on scale of 1-5: 1=strongest affect; 5 = no affect]

Rating Scale	To Work	From Work:
1-Strong Affect	15.9%	26.1%
2-	17.2%	24.4%
3-	23.2%	20.7%
4-	24.9%	15.8%
5-No Affect	18.9%	13.1%

Parking Usage – Location, Costs, and Availability: Nearly 44% of the respondents reported parking in one of the downtown parking garages listed on the survey. Fourteen percent of respondents reported being able to park on-site at work. Less than 10% reported parking at street meters. For detailed results by location see Appendix II:4.

8 This excludes major employers such as those listed in the table and UVM and Fletcher Allen.

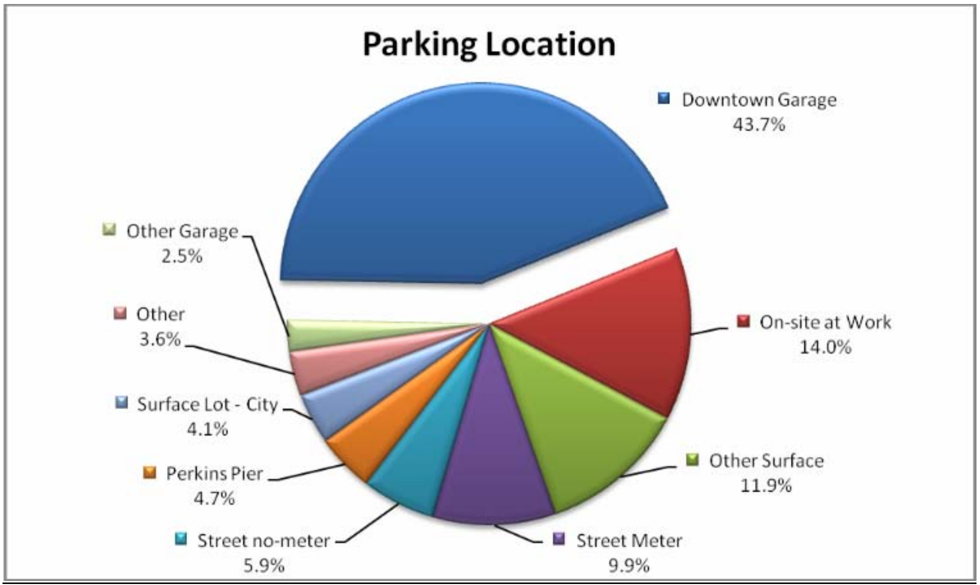


FIGURE 8

A large percentage of respondents, 87%, reported that they do not have trouble finding a parking space at the beginning of their workday (nearly all workers reported arriving between 7:30 and 9:00 am). The success in finding parking drops by about one-half if workers leave and return to work during the work day.

FIGURE 9

FIGURE 10

More than 57% of respondents who drive alone reported that they do not personally pay for parking while at work. Hospitality and retail workers were more likely to report that they paid for parking than professional, office and management workers. Nearly 45% of employers pay for some portion of employee parking costs.

FIGURE 11

FIGURE 12

For the City of Burlington, nearly 80% of respondents do not pay for parking. For the State of Vermont, nearly 90% do not pay.

FIGURE 13

Of the respondents who reported their parking costs, more than 70% indicated that parking cost them less than $80 per month; equivalent to less than $4.00 per day based on 21 working days per month. For detailed information on the Cost of Parking per month please see Appendix II:5.

Satisfaction with Commute: Nearly 90% of respondents reported being somewhat or very satisfied with their commute. Bikers and Walkers reported the highest level of satisfaction among all responding commuters. Over 75% of walkers and 60% of bikers reported being very satisfied. Those that drive alone and carpoolers were most likely to report being "Not Satisfied" with their commute. Full data appears in the chart below.

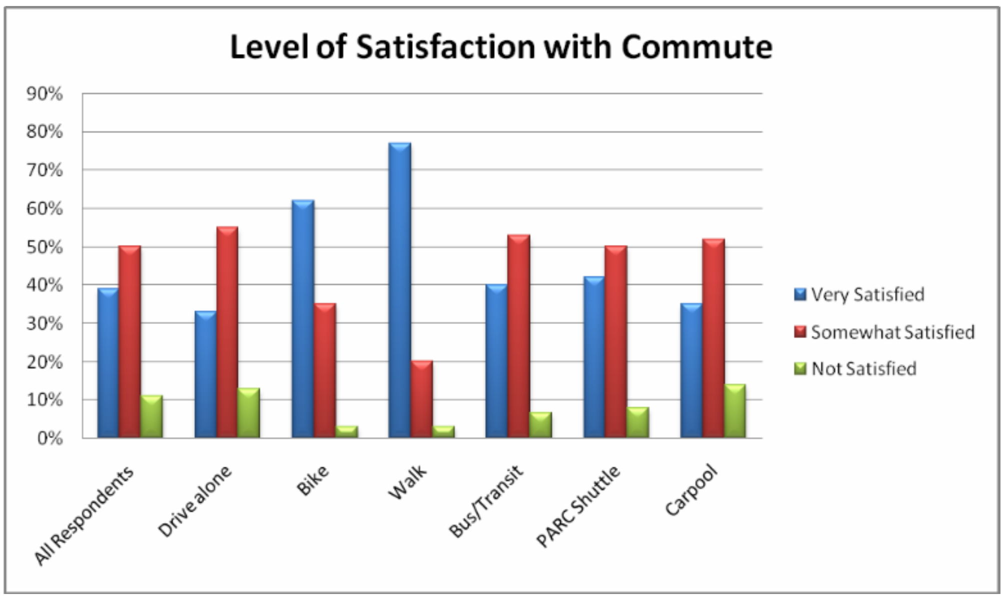


FIGURE 14

CCTA's PARC Program Awareness: The survey attempted to gauge employee's awareness of the PARC Shuttle Park and Ride program (parking and 15 minute shuttle service located on Lakeside Ave. off of Pine St.). Respondents were split roughly 50/50 when asked if they were aware of this program. When only Chittenden Bank employees were considered, awareness of the program rose significantly to nearly 98%.

POTENTIAL FOR CHANGE

What Other Ways Do You Get to Work?: Respondents were surveyed about what other modes of transportation they use beyond their primary mode. Of commuters who drive single occupancy vehicles, the largest commuting segment, 64% reported being unlikely to use another mode of transportation. Roughly one in ten of them reported being likely to bike, ride the bus walk, or carpool to work. The survey allowed respondents to "check all that apply."

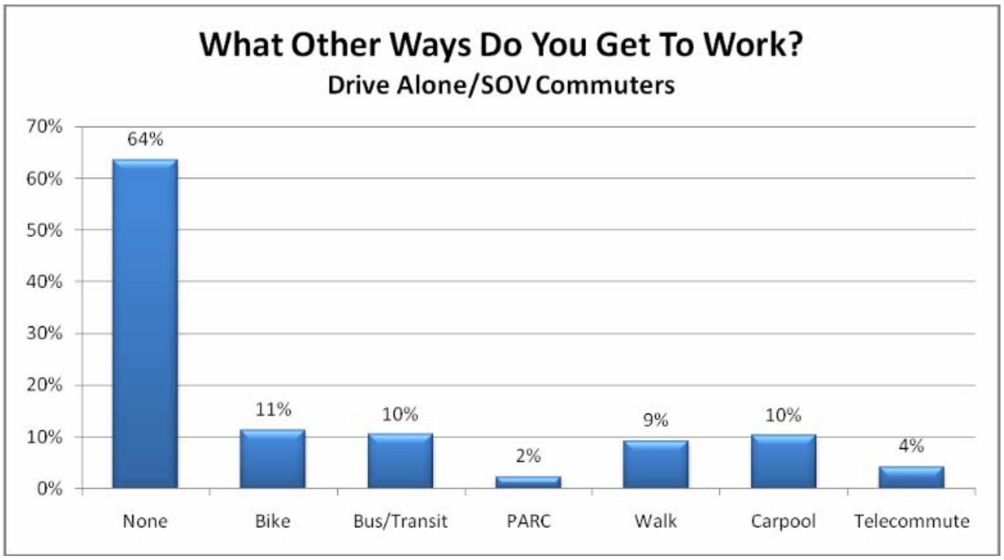


FIGURE 15

For all other Primary Modes, respondents selected driving alone as their first choice for an alternative mode of commuting. Commuters who reported biking, walking, and taking the bus, were more likely to use other modes. The Other Primary Mode category included mainly seasonal modes such as: ferry, motorcycle, scooter, skateboard, jogging, etc. For complete data on the likelihood to use other modes see Appendix II:6.

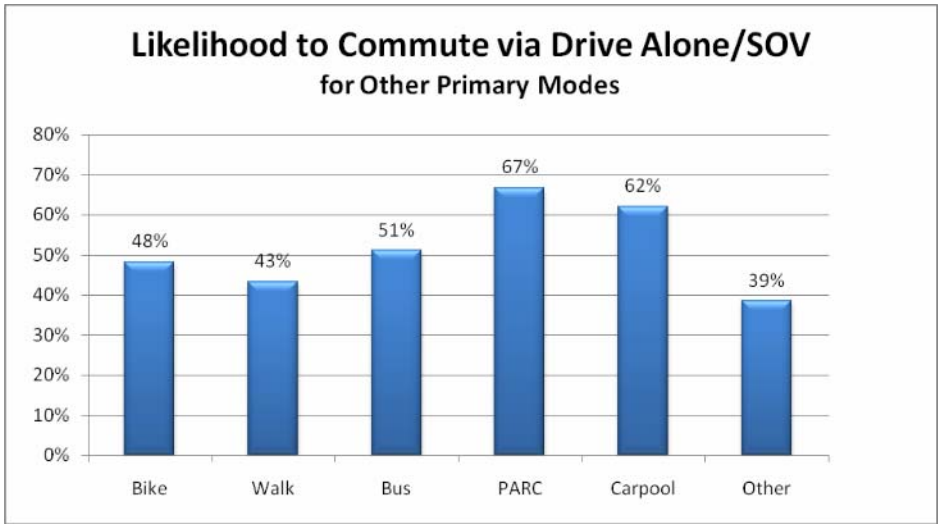


FIGURE 16

Potential to Change Commuting Methods: Respondents were asked what their preference would be if they were asked to try an alternative mode of transportation for two days of their commute. Of those who commute via a single occupancy vehicle, representing the largest number of respondents, bus/transit or Link Express was their top choice as an alternative mode of commuting. The survey allowed respondents to "check all that apply."

Respondents who drive alone were also asked to report their reasons for not taking transit or carpooling. In both cases the largest number responded that they needed their car before or after work. This survey question allowed respondents to "check all that apply." For complete results for this question please see Appendix II:7

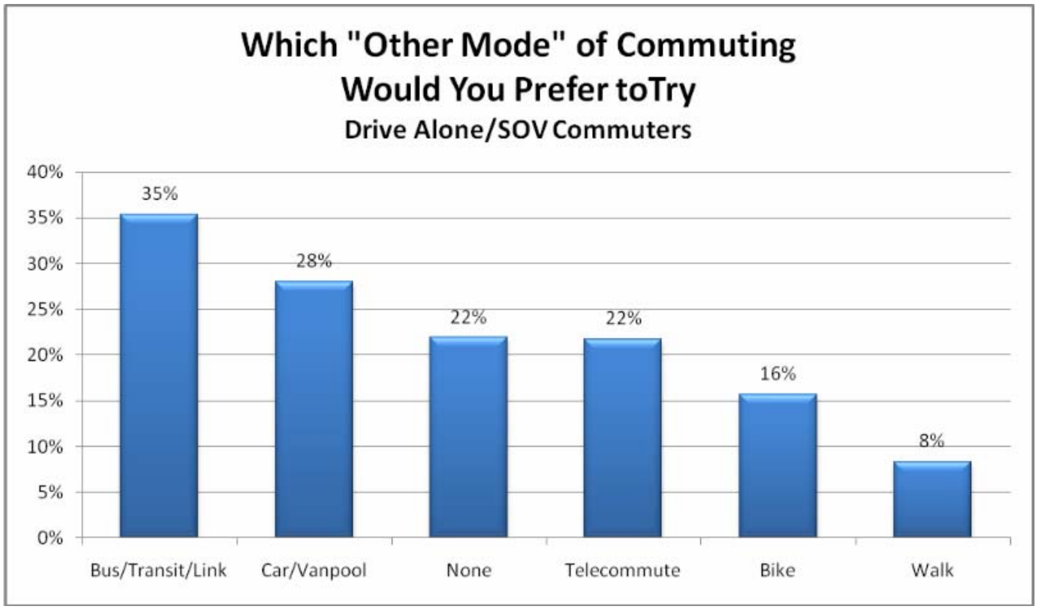


FIGURE 17

Commuting Incentives and Attitudes: The survey indicated that incentives play a role in an employee's commuting decision. More than 55% of the respondents to the survey reported that their employer offers NO Incentives/Services towards their commute. Of the respondents reporting the availability of incentives, most were employed by Chittenden Bank which supports the CCTA PARC Program; and City Market, VHFA, and the City of Burlington. Nearly 20% of respondents indicated that they did not know if their employer offered incentives/services towards commuting. For a complete survey results on incentives see Appendix II:8.

Effect of Incentives: The survey asked respondents to report on the effect that various types of incentives/services would have on their decision to try alternate modes of commuting. When asked about taking the bus to and from work; 50% or more of all respondents selected these three incentives/services as having the strongest effect on their decision:

- Need bus stop within walking distance of home and workplace 60.2%
- Free or reduced bus fare 55.8%
- Direct express service 53.1%

When asked about walking to and from work, respondents' listed monetary incentives/rewards as having the strongest effect on their decision. Biking to and from work would gain the strongest effect from such incentives/services as safe bike paths/routes, and monetary incentives and rewards, with more than 50% of respondents selecting both. Finally, the survey asked about incentives/services to encourage car/vanpooling. None of the choices received more a than 50% response; monetary incentives was close with 49%. Monetary incentives showed having a strong effect on commuting choices for all alternative modes of commuting surveyed (this assumes one interprets free/reduced fair as a monetary incentive). For tables showing data on the effect of incentives, please see Appendix II:9.

BARRIERS TO CHANGE

The survey also looked at the issues and challenges commuters perceive if they were to choose an alternate mode of commuting. For those who drive alone, they reported the need to use their car before or after work as the most significant challenge associated with taking transit or carpooling. About one-third of respondents reporting making stops on the way TO work and about two-thirds on their way FROM work. The most common type of stop on the way to work was eating or picking up food. On their way FROM work, respondents reported personal errands, shopping, eating or picking up food and exercise as the more common types of stops. Professional and technical employees reported being more likely to make stops than other types of workers. About 14% of respondents reported picking up and dropping off children as a stop on their commute TO and FROM work. For complete data please see Appendix II:10.

IV. SURVEY COMMENTS

At the end of the survey, respondents had an opportunity to provide any comments, feedback, suggestions, and issues with regards to their commute. Overall, comments were very enthusiastic, constructive and valuable. A synopsis of comments received appears in Appendix III.

V. CONCLUSIONS AND NEXT STEPS

The Downtown Employee Transportation Survey offered insights into how employees commute to work in the downtown Burlington district. The BBA, CATMA and CCMPO were pleased with the number of responses to the survey, which exceeded expectations. With over 1350 respondents, the survey provided a good look at employee commuting habits in Burlington's downtown district.

Commuting Habits Indicate Opportunity for Change: Most people currently commute to Burlington via a single occupancy vehicle. In conditions where large numbers of commuters drive alone to work, there exists the potential to change those commuters to other modes of transportation. When CATMA first surveyed its commuter population in 2000, it reported Drive Alone/SOV commuting rates of 74%. CATMA viewed these results as indicative of an opportunity to change the commuting habits of a sizeable population. Within a year, through education, incentive offerings and improved transportation options, CATMA was able to reduce its drive alone rate to 69% initially and to 54% in 2007. Drive Alone commuters reported the following in the Downtown Employee Transportation Survey:

- Most commuters work a typical office schedule of 9 to 5, Monday to Friday;
- Commuters workplaces are clustered in the downtown district;
- 78% of drive alone commuters indicated that they would try an alternative mode of commuting if asked to switch;
- Nearly 60% of drive alone commuters pay for some portion of their parking costs;
- Drive alone commuters report the lowest level of satisfaction with their commute when compared with other modes;
- Nearly 60% of commuters receive no incentives/services for alternate modes of transportation from their employer.

The CATMA experience suggests that downtown businesses should explore forming a Downtown TMA. Such an organization would explore whether an opportunity and need exists to switch drive alone commuters to alternative modes such as bus/transit, car/vanpooling, biking and walking among other parking and transportation issues.

Downtown Parking and Transportation Costs Employees and Employers: The survey indicated that nearly 45% of employers pay for employee parking some or all of the time. Employees reported spending on average $40 to $60 per month for parking. A Downtown TMA could look at the best and highest uses for our communities parking and transportation dollars and resources. The needs of the Business community should be gauged to determine the correct course of action. A Downtown TMA could serve as a home for such discussions.

The Time May be Right: Parking and transportation continues to be a concern for those that live, work and visit in downtown Burlington. Several constituencies with varied needs share the city's parking and transportation resources. A Downtown TMA could serve as a public/private partnership that launches the discussion of how to best manage resources to serve all users.

Several factors in the local economy and nationwide indicate the need for a discussion about downtown transportation and parking. Firstly, there have been many reports on the impacts that rising gas prices are having on commuting choices. Locally, CCTA and CATMA are reporting increased ridership on bus/transit lines. According to a June 2, 2008 Burlington Free Press story local bus ridership is up 7% from last year and there has been 36% increase in ridership on LINK routes.

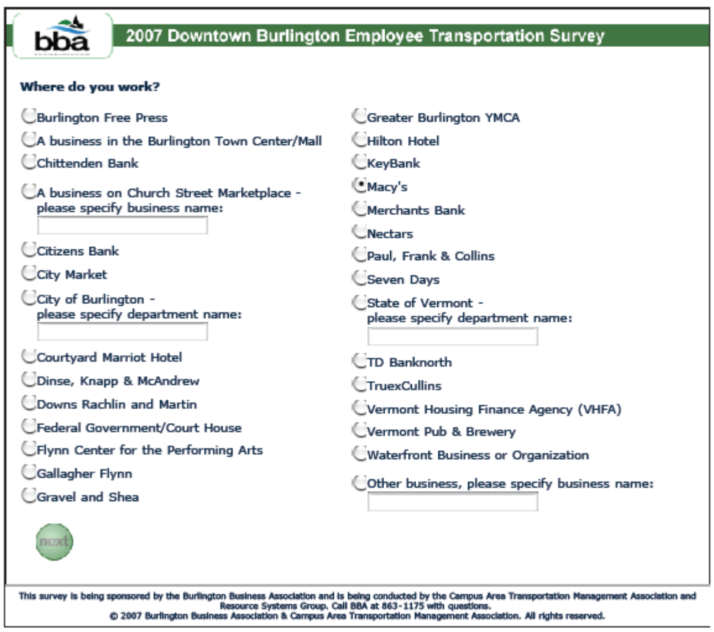
The State of Vermont Agency of Human Services is actively seeking solutions to meet the parking and transportation needs of its employees. CATMA has been working with the State on an interim basis to provide alternative commuting education and services and program to its downtown employees.

We Need to Learn More: The Downtown Employee Transportation Survey was an important first step. It provided insight into the commuting habits of downtown employees. Conducting annual surveys of this population will provide fresh information about commuting habits, attitudes and demographics. Now that we've learned about employees, it is time to learn about the needs of other groups. Employers need to weigh-in, along with a host of other groups that rely on the parking and transportation system.

Next Steps: BBA and CATMA recommend the formation of an Ad Hoc Board of Directors; a public/private partnership that would examine all sides of the parking and transportation system in downtown

Burlington. This group, by learning more, would decide whether Burlington needs to form a Downtown TMA and what would be its mission, vision, goals and aims.

APPENDIX I: DOWNTOWN EMPLOYEE TRANSPORTATION SURVEY SAMPLE PAGES


bba

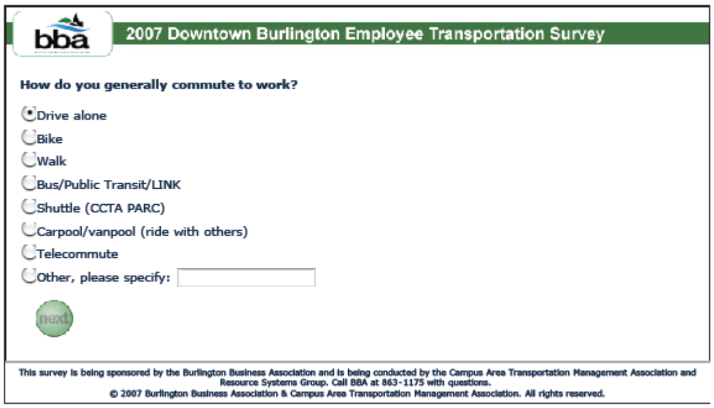
2007 Downtown Burlington Employee Transportation Survey

Where do you work?

- Burlington Free Press
- A business in the Burlington Town Center/Mall
- Chittenden Bank
- A business on Church Street Marketplace - please specify business name:
- Citizens Bank
- City Market
- City of Burlington - please specify department name:
- Courtyard Marriot Hotel
- Dinse, Knapp & McAndrew
- Downs Rachlin and Martin
- Federal Government/Court House
- Flynn Center for the Performing Arts
- Gallagher Flynn
- Gravel and Shea
- Greater Burlington YMCA
- Hilton Hotel
- KeyBank
- Macy's
- Merchants Bank
- Nectars
- Paul, Frank & Collins
- Seven Days
- State of Vermont - please specify department name:
- TD Banknorth
- TruexCullins
- Vermont Housing Finance Agency (VHFA)
- Vermont Pub & Brewery
- Waterfront Business or Organization
- Other business, please specify business name:

next

This survey is being sponsored by the Burlington Business Association and is being conducted by the Campus Area Transportation Management Association and Resource Systems Group. Call BBA at 863-1175 with questions.


bba
2007 Downtown Burlington Employee Transportation Survey
How do you generally commute to work?
Drive alone
Bike
Walk
Bus/Public Transit/LINK
Shuttle (CCTA PARC)
Carpool/vanpool (ride with others)
Telecommute
Other, please specify:
next
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bba

2007 Downtown Burlington Employee Transportation Survey

What is your PRIMARY parking location?

Parking Garage

- ○ Burlington Town Center Garage
- ◉ Church Street Marketplace Garage
- ○ College Street Garage (Hilton)
- ○ Corporate Plaza (KeyBank/Merchants Bank)
- ○ Courthouse Plaza
- ○ Courtyard Mariott
- ○ Gateway Square
- ○ Lake & College (60 Lake Street)
- ○ Lakeview Garage (Macy's)
- ○ Main Street Landing (under Cornerstone Building)
- ○ Park Plaza (ICV)
- ○ Vermont State Office Building
- ○ Other parking garage, please specify: ______

Surface Lot

- ○ Browns Court (Corner of King & St. Paul Streets)
- ○ Center Street
- ○ Chittenden Bank
- ○ City Market
- ○ Elmwood Avenue
- ○ Hood Plant (King Street)
- ○ Library Lot
- ○ Main Street Lot (Corner of Main & So. Winooski)
- ○ Main Street Landing (Union Station) Lot
- ○ Perkins Pier
- ○ TD Banknorth
- ○ Unitarian Church
- ○ YMCA Lot
- ○ Waterfront Park/Pease Lot
- ○ Other surface lot, please specify: ______

Other

- ○ On-site parking at workplace (not listed above)
- ○ On street metered parking
- ○ On street non-metered parking
- ○ Other parking, please specify closest street intersection: ______

next

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APPENDIX II: SUPPORTING TABLES AND GRAPHS

1 LOCATION OF EMPLOYERS

The Table below provides detailed information on the location of employers as reported by respondents. All locations are in Burlington, Vermont.

Location	% of Respondents	Location	% of Respondents
Bank Street	7.9%	Maple Street	0.4%
Battery Street	4.6%	Pearl Street	3.5%
Cherry Street	21.9%	Pine Street	4.8%
Church Street	10.8%	St Paul Street	4.3%
College Street	8.6%	So Champlain St	2.8%
King Street	1.3%	So Union St	0.6%
Lake Street	3.4%	So Winooski Ave	1.8%
Main Street	14.0%	Other	9.3%

2 ROUTES TAKEN TO WORK

Overall, Routes Taken to Work [check all that apply]	
Main St/Williston Road	87.0%
North Avenue	71.5%
I89	86.4%
St Paul Street	71.2%
Pearl Street/Colchester Avenue	85.2%
Riverside Avenue	71.1%
Shelburne Road	82.8%
Northern Connector/Rt 127	63.7%
Pine Street	79.0%
South Willard Street	48.2%
Other	78.5 %
Spear Street	39.4%
College Street	77.3%
Battery Street	76.9%
South Winooski Avenue	75.3%

3 PRIMARY MODES OF COMMUTING BY EMPLOYER

	Primary Modes of Commuting by Employer						
Employer	**Primary Commuting Mode**						
	Drive Alone	Carpool	Bus/Transit	PARC Shuttle	Walk	Bike	Other
Chittenden Bank	69.1%	7.4%	5.9%	5.3%	5.9%	0%	6.4%
State of Vermont	77.9%	7.0%	4.1%	0.4%	4.9%	2.5%	3.3%
City of Burlington	74.1%	6.9%	2.6%	0%	6.9%	5.2%	4.3%
All Other	68.1%	7.0%	2.6%	0.1%	13.1%	5.7%	3.4%

4 PRIMARY PARKING LOCATIONS

Primary Parking Location	
On site at workplace	14.0%
Hilton/College Street garage	10.6%
On-street meters	9.9%
Lakeview/Macy's garage	8.6%
Burlington Town Center garage	7.9%
On-street, non-meter	5.9%
Church Street Marketplace garage	5.6%
Perkins Pier	4.7%
Other Surface Parking Lot*	6.1%
Other Parking/Street Intersections**	3.1%
Other Parking Garage***	2.4%

Note: *Other surface parking lots included: 208 Flynn Avenue, Behind Ski Rack; Corner of Maple & South Champlain Streets; Lot next to Handy's diner; COTS; Eagles Club; Ethan Allen Club; Police dept lot; Gilbane lot.

**Other parking/Street intersections included: alley off Main & Pine St; Church & Clark St; Pearl St & Clark; College St & Hungerford Ter.; Friends apt; King St; Murray St; No Winooski Ave & Bank St.; Gilbane lot.

***Other parking garages included: 108 Cherry St; 126 College ICV; 40 Main St; 60 Lake St; Bank St Garage; Costello Courthouse; Health Dept; King Street Garage.

5 COST OF PARKING PER MONTH

Cost of Parking Per Month	
$1 to $20	30.6%
$21 to $40	22.1%
$41 to $60	10.1%
$61 to $80	19.1%
$81 to $100	6.3%
$101 to $120	2.3%
more than $120	0.7%
don't pay	8.8%

6 USING ALTERNATE MODES TO COMMUTE

	What Other Ways Do You Get to Work?								
Primary Mode	**Alternate Mode**								
	Drive	**Bike**	**Walk**	**Bus/ Public Transit/ Link**	**Carpool Vanpool**	**Shuttle (CCTA PARC)**	**Telecommute**	**Other**	**None**
Drive Alone	-	11.2%	9.2%	10.4%	10.2%	2.2%	4.1%	3.0%	63.5%
Bike	48.3%	-	60.3%	24.1%	8.6%	1.7%	5.2%	6.9%	1.7%
Walk	43.4%	36%	-	10.3%	11.8%	0.7%	1.5%	5.1%	19.9%
Bus	51.1%	28.9%	17.8%	-	33.3%	6.7%	0%	6.7%	4.4%
PARC	66.7%	8.3%	8.3%	8.3%	0%	-	0%	0%	16.7%
Carpool	62.1%	15.8%	11.6%	22.1%	-	1.1%	10.5%	1.1%	17.9%
Other	38.5%	21.2%	26.9%	21.2%	11.5%	5.8%	3.8%	19.2%	25.0%

7 CHALLENGES WITH USING AN ALTERNATE MODE FOR DRIVE ALONE COMMUTERS

Challenges of Using an Alternate Mode Drive Alone Commuters	
Need car before/after work	39.4%
It takes too much time	35.5%
No bus stop near their home	31.5%
No direct service	25.3%
Service not frequent enough	24.6%

Live close to work.	16.7%

Reasons for Not Carpooling Drive Alone Commuters	
Need car before/after work	49.1
Do not like to depend on others	44.4
Irregular work schedule	38.3
No one to ride with	32.4
Need car at work for company business	25.6
Need car for personal business	22.9

8 CURRENT INCENTIVES OFFERED

Current Incentives offered - Overall	
No incentives/services	57.2%
Didn't know	18.2%
CCTA PARC program	13.4%
Free bus fare	9.7%
Reduced bus fare	3.5%
Emergency Ride Home	3.3%
Bike-Walk incentives	3.1%
Carpool matching service	1.0%

9 EFFECTS OF INCENTIVES ON COMMUTING CHOICES

Strongest Effect of Incentives/Services to Consider Taking the Bus TO/FROM Work	
Need bus stop within walking distance of home and workplace	60.2%
Free or reduced bus fare	55.8%
Direct express service	53.1%
More frequent evening service	39.5%
More frequent daytime service	38.6%
More available info on bus routes/schedules	24.9%
More and improved bus shelters	24.3%
Clearly marked bus stops	19.0%
More frequent weekend service	14.2%

Strongest Effect of Incentives/Services to Consider Walking TO/FROM Work:	
Monetary incentives/ rewards	54.4%
Better sidewalks along route to work	24.1%

Improved environment [landscape, lighting]	22.8%
More sidewalks along route to work	21.5%

Strongest Effect of Incentives/Services to Consider Biking TO/FROM Work	
Safe bike paths/routes	56.7%
Monetary incentives/ rewards	52.7%
Secure, convenient bike racks at destination	38.0%
Convenient access to showers and lockers	29.3%
Less stringent dress code at work	20.7%

Strongest Effect of Incentives/Services to Consider Car/Vanpooling TO/FROM Work	
Monetary incentives/ gas cards	49.1%
Free or reduced parking for carpools	27.0%
Preferential parking for carpools	20.6%
Accessible & Current info available on-line on carpools	19.1%
Vanpool subsidies	15.7%

10 STOPS TO/FROM WORK

What Stops Do Employees Make on the Way TO Work	
Rarely make any stops on the way to work	63.4%
Eat or pick up food	14.1%
Drop off children at school/daycare	13.4%
Personal errands	8.7%
Exercise/recreational stop	2.8%

What Stops Do Employees Make on the Way FROM Work	
Personal errands	38.1%
Rarely make stops	33.5%
Shop	31.2%
Eat or pick up food	30.6%
Stop to exercise/ recreational activity	19.0%
Pick-up children at school/daycare	14.1%

APPENDIX III: SURVEY COMMENTS

Downtown Burlington Employee Transportation Survey Report
June 2008