

Downtown & Midtown Mobility Survey

June 2019
Executive Summary

SURVEY OVERVIEW

The Downtown & Midtown Mobility Survey was conducted between February 11-22, 2019, in an effort to better understand how individuals who spend a majority of their time in downtown and midtown Omaha get to and from work. It also asked them about how they *want* to commute, along with their perspectives on several other mobility and transportation issues.



Eight major employers and landowners in Omaha's downtown and midtown provided Verdis Group with access to their employees and tenants for the survey.

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The Active Transportation Opportunity

Respondents demonstrated a high interest in active commuting, which is defined as walking, bicycling, using transit or carpooling. The area boasts a 22% active commuting mode split (primarily comprised of walking, bicycling, riding the bus or carpooling to work) today, but the potential to increase the percentage of commuters using active transportation is high. Verdis Group's most conservative analysis suggests that **the area's active mode split could increase to 39% if employers were to support their employees in actively commuting.**

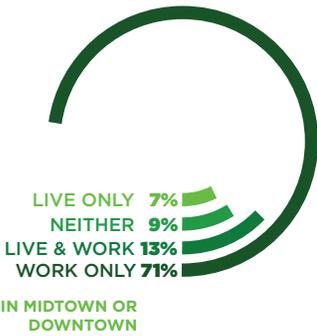
If such a shift were to occur, several benefits would be seen in the community:*

- More than 1,300 parking stalls per day freed up in downtown and midtown
- \$1.9M+ in annual parking costs saved, primarily by employers
- 2,600 fewer vehicle trips per day on our roadways
- Improved air quality
- Reduced stress and improved health for commuters
- Omaha becomes more attractive to our millennials and those who may want to move here
- A more vibrant downtown and midtown, with increased street-level activity, social connectedness, and retail and restaurant business

The addition of ORBT (Omaha's bus rapid transit system launching in early 2020) and a proposed urban circulator (aka modern streetcar) could increase the area's mode split by an additional 9%, freeing up another 754 parking spots per day and saving \$1M in parking costs based on surface parking.*



*The 8,500 survey respondents represent approximately 12% of the total number of people who live, work or go to school inside the survey area. These impacts represent mode shifts tied only to their responses, which means impacts across the total population would be even greater.



Breakdown of respondents and whether they live/work in the study area.

More Than 8,500 Survey Respondents

There were a total of 8,514 survey respondents, 9% of which do not live or work in the study area. According to the census, 62,700 people either work, live, or work and live in this area. Survey respondents represent 12% of this area's census block group commuting population.

People who actively commute may use transit one day, ride a bicycle the following day, and drive the day after that — depending on schedules. They may sometimes use multiple modes during one commute trip to work, such as walking to a transit stop, riding transit, and then riding a Heartland B-cycle to work.

Calculating the Potential

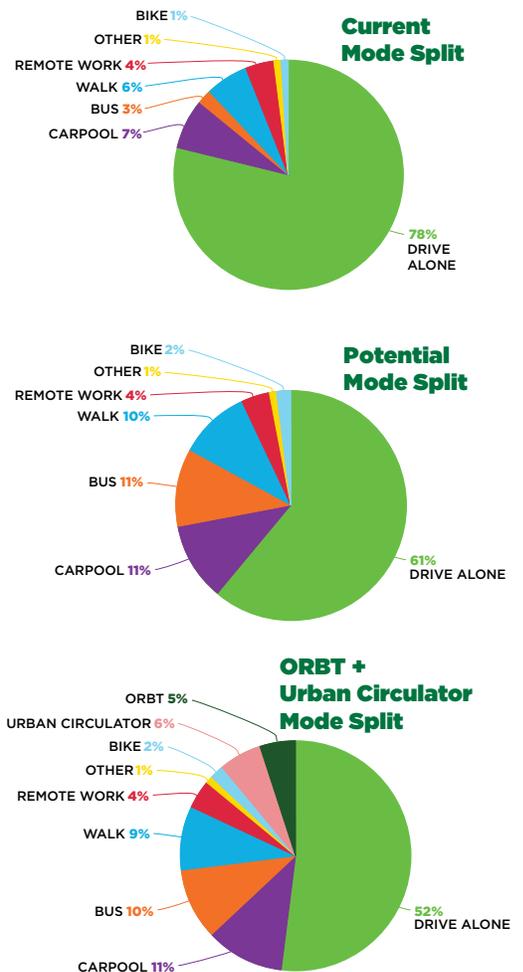
To determine the potential mode split, a baseline was first established by asking employees how they currently get to work. Next, respondents were asked how likely they would be to commute using certain modes if their employer implemented an active commuting program with specific programmatic support, such as a free bus pass, indoor bike parking and access to showers for bicycle commuters.

For the ORBT and urban circulator potential mode split, the same programmatic approach was taken, while adding information about the ORBT route and the proposed urban circulator route to ensure respondents made an informed decision regarding these two options that don't yet exist.

Current, Potential, and ORBT + Urban Circulator Mode Splits

The current active commuting mode split for all respondents is 22%, which is six points higher than the mode split of the Omaha Metropolitan Statistical Area. If employers and residential unit owners were to implement an active commuting program, the area's mode split is projected to increase to 39%.

The addition of ORBT and a modern urban circulator could further increase the number of people actively commuting to 48%.



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Key Elements of a Successful Active Transportation Program



Emergency ride home;
Flex parking



Adequate and secure bike parking; Information on bike routes; Shower and locker access



Subsidized or free bus passes; Information about how to use Metro Transit



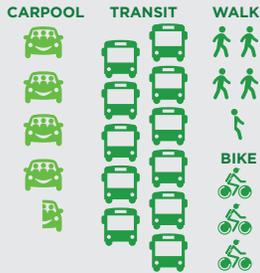
Carpool matching service; Preferred carpool parking

5 KEY FINDINGS

OUT OF 100 PARKING SPOTS FROM PEOPLE DRIVING ALONE, 23...



ARE FREED UP WHEN PEOPLE SWITCH TO:



#1 Active commuting programs will increase the number of people using active transportation, which will reduce parking demand, free up valuable land for more productive uses, and reduce congestion.

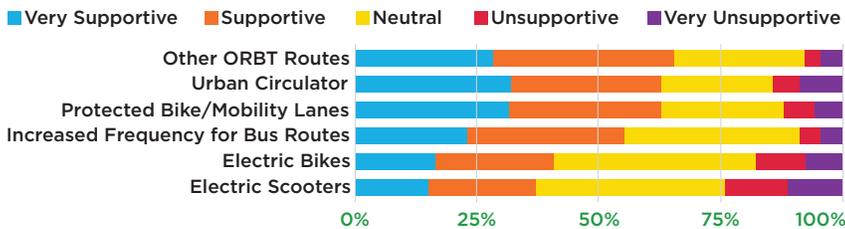
If employers were to implement active commuting programs, 23 out of every 100 trips currently made alone in a car could be avoided, which would reduce parking demand by 21 spaces. The two remaining parking spaces would be used for carpool parking.

#2 There is widespread support, particularly among millennials, for active transportation.

When compared to the overall survey population, almost twice as many millennials say they are “very likely” to use an alternative form of transportation. Millennials are also more likely to live in the study area; 60% of respondents who live and work in the area are millennials, which is nearly twice as high as millennials’ overall representation in this survey (38%).

#3 There is broad support for new transit and mobility infrastructure.

When asked about levels of support for potential infrastructure improvements, respondents were most supportive of other ORBT routes (65%), the urban circulator (63%), and protected bike/mobility lanes (63%).



#4 Employers play a key role.

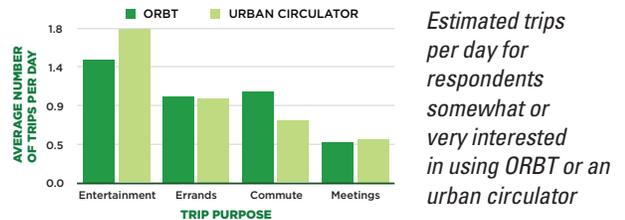
53% of respondents said it is very or somewhat important that their employer supports multimodal transit, and support is 12 points higher (65%) for those who both live and work in the study area. Employers play a critical role helping their employees shift to active modes of transportation through active commuting programs.

Over the past decade, Verdis Group has helped local employers find significant cost savings around parking — and greater employee engagement — through strategic investments in support of employees who use active transportation.

#5 There is high interest in using ORBT and an urban circulator.

Respondents expressed high interest in both ORBT and the urban circulator. 73% of survey respondents are somewhat (38%) or very (35%) interested in using the urban circulator, with those who live in the study area expressing a particularly high level of interest (87%) in using the urban circulator. Similarly, interest in using ORBT was high, with 50% of respondents being somewhat (36%) or very (14%) interested.

As indicated below, respondents envision using both ORBT and the urban circulator for entertainment. Respondents are more likely to use ORBT for commuting whereas they are more likely to use an urban circulator for entertainment.



6 RECOMMENDATIONS FOR CITY LEADERS

Based on these results, Verdis Group encourages Omaha’s elected, business, and philanthropic leaders to consider the following recommendations.

#1 Employers should create active commuting programs for employees

Omaha’s employers can be a huge catalyst for shifting their employees’ travel habits to be more active. Doing so attracts talent, saves money, and benefits the community. Employers should consider creating an active commuting program that includes:

- Emergency rides home
- Preferred parking for carpoolers
- Transit subsidies
- Flex parking
- Carpool matching
- Reduced parking subsidy to employees
- Protected bike parking

#2 Increase investment in active transportation infrastructure of all types

Omaha's active transportation system and infrastructure are poorly funded. As an example, on a per capita basis, Omaha lags behind many of its peers in transit funding (see below). Future investments should not be limited to a single mode: as evidenced in this study, respondents support many types of active transportation with the most support for additional ORBT routes, an urban circulator, protected bike/mobility lanes, and more frequent Metro routes. Simply put, more resources toward active transportation infrastructure will make it better and attract more users.



#3 Address the parking perception issue, organize the parking system more efficiently, and eliminate parking minimums

Of those respondents that indicated they were not interested in living in the study area, 30% of them said parking, or the lack thereof, was a reason why. Alternatively, the data show there is ample parking. Per a 2011 City of Omaha study, only about half of downtown's (east of 24th St.) 40,000 parking stalls are typically used at peak demand. The parking misperception results in less interest in living, working and playing downtown.

City leaders should work to address the misconception that there is no parking in downtown/midtown and should continue working toward a more efficient parking system where spaces are used for different purposes and open to different constituencies depending on the time of day and day of the week.

Parking minimums, a required number of parking spaces for developers to build, should be eliminated where they exist.

#4 Pursue and support transit oriented development

Gentle density is integral to driving active transportation. Pursuing and supporting transit oriented development will help to ensure Omaha develops in a way that supports transit and active transportation. Fortunately the City of Omaha already has an effort underway to create transit oriented development zoning options that can be adopted along Omaha's high-potential transit corridors.

#5 Improve walkability

Leaders should pursue myriad policies and land developments that improve walkability, which will attract more active transportation commuters, tourists, and businesses to the area. Walkability expert and author Jeff Speck provides exemplary guidance: to be favored, a walk must be useful, safe, comfortable, and interesting.

#6 Convert one-way streets to two-way streets

Omaha's network of primarily one-way streets downtown and into midtown means traffic moves through neighborhoods at higher speeds. This makes walking and bicycling more difficult, less enjoyable, and more dangerous.

Such a conversion will increase the number of people actively using these streets throughout the day, increasing the number of business transactions, property values, and innovation, and often decreasing crime. A conversion experiment in Louisville, Kentucky showed just that: significant reductions in collisions and crime over two years and increased property values.

Our leaders should develop and implement a plan to convert many of Omaha's one-way streets to two-way.

Thank you!

These organizations provided access to their employees or tenants for the Downtown & Midtown Mobility Survey:

- Creighton University
- First National Bank
- GreenSlate Development
- Landmark Center
- Midtown Crossing
- Mutual of Omaha
- NuStyle Development
- UNMC/Nebraska Medicine



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