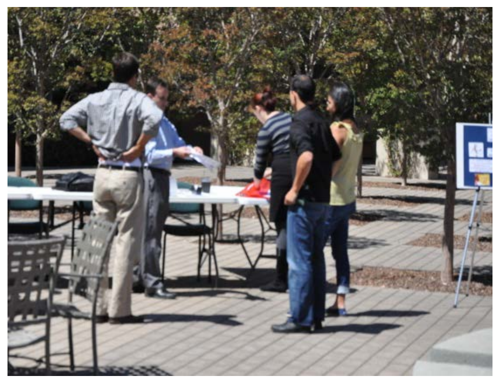
The Marin Commuter:
Commute Survey and Focus Group Report

Key Issues and Suggestions
Reported by Employees and Employers in Marin

June 10, 2013

Acknowledgements

Consultants/Partners

Dr. Robert Eyler, Marin Economic Forum
Alana Capozzi, Marin Economic Forum
Christy Garland, 511.org
Lydia Thornton, 511.org
Michael Satchell, 511.org
Gina Arias, 511.org
Rick Ruvolo, TAM Transportation Demand Management Coordinator
San Rafael Chamber of Commerce Leadership Institute 2013

TAM Staff

Dianne Steinhauser, Executive Director
Linda M. Jackson AICP, Transportation Planning Manager
Scott McDonald, Associate Transportation Planner
Sarah Cronin, TAM Summer Intern
Dennis Villalobos, TAM Summer Intern

Special thanks to the following groups:

San Rafael Chamber Economic Vitality Committee
Novato Chamber of Commerce Leadership Institute
San Rafael Chamber of Commerce Leadership Institute
Marin County Chambers of Commerce
Marin Economic Forum Board of Directors
Sausalito Chamber of Commerce Leadership Institute
California Grill & Rotisserie
San Rafael Corporate Center
Courthouse Square in San Rafael
Hamilton Landing in Novato
Harbor Drive Executive Park in Sausalito

Table of Contents

Introduction

Beginning in the summer of 2012, the Transportation Authority of Marin (TAM) kicked off a survey and focus group effort with employees and employers in Marin to better understand the needs of commuters. The goal of the outreach was to ensure TAM's programs appropriately support and promote green transportation alternatives to driving alone, and explore opportunities to bring bike share and car share programs to Marin.

TAM held four employee commuter survey events in Marin, at the San Rafael Corporate Center, Courthouse Square in Downtown San Rafael, Hamilton Landing in Novato, and Harbor Drive Executive Park in Sausalito. TAM worked in partnership with 511.org to develop the survey instruments, conduct outreach, and analyze the results.

In addition, TAM worked with the Marin Economic Forum to collect survey and focus group input about commute issues from Marin employers. This work included 6 focus groups (five in-person and one virtual focus group), and surveying of 20 employers, including small and medium size businesses. The outreach to employers also provided an opportunity to preview and test potential TAM commute programs. This report summarizes the results and key issues identified through an evaluation of the combined feedback of employers and employees.

Survey of Employees

The purpose of the Employee Commute Survey was to find out from Marin employees the issues, needs and ideas about their commutes to work. The survey was first tested on July 31st, with a pilot 'hot dog' lunch served to employees at the San Rafael Corporate Center. In exchange for completing a survey, an employee received a hot dog lunch.

The survey instrument was built with input from Dr. Rob Eyler (Marin Economic Forum) and Rick Ruvolo, based on knowledge of 511.org interests. The initial San Rafael Corporate Center survey was refined with the help of 511.org staff, and expanded to include questions related to bike and car share programs. Over the summer and fall of 2012, there were four surveys of commuters at Marin business centers:

San Rafael Corporate Center, July 31, 2012 (182 surveys)
Courthouse Square, San Rafael, October 12, 2012 (73 surveys)
Hamilton Landing, Novato, October 25, 2012 (180 surveys)
Harbor Drive Executive Park, Sausalito, November 14, 2012 (69 surveys)

A total of 504 people participated in the lunchtime surveys.

San Rafael Corporate Center Employee Survey

Among the 182 survey participants at the San Rafael Corporate Center, some respondents included suggestions in addition to responses to the survey questions. These are also included along with the responses in the survey below.

Transportation Authority of Marin

Marin Employee Commute Survey

The Transportation Authority of Marin (TAM) is surveying employees in Marin to identify opportunities to encourage alternative modes of transportation. Please complete the following survey about your commute to work. We appreciate your feedback.

1. What is most important to you when choosing how you get to work? (Select up to 3)

	Number	Percent
Travel Time	126	69%
Cost	54	30%
Convenience/Flexibility	99	54%
Reliability	52	29%
Comfort & Safety	28	15%
Reducing pollution, conserving energy	13	7%
Ability to make stops on the way to work or home	36	20%
Stress	20	11%

2. How do you get to work each day **for a typical work week**? (If you used more than one mode, please indicate the one used for the longest part of your trip.)

	Monday	Tuesday	Wednesday	Thursday	Friday
Drive Alone	170	165	155	155	165
Carpool	17	20	17	17	17
Vanpool	0	0	0	1	0
Bus	8	8	9	10	5
Ferry	1	1	1	1	1
Shuttle	0	0	0	0	0
Bike	5	6	10	6	6
Walk	2	2	2	2	2

Day off	0	0	0	0	0
Work at home	2	3	4	5	8
Other (describe)	1	1	3	2	1

3. Does your company provide incentives or assistance to use public or alternative transportation (transit, carpool, vanpool, bicycling, walking, driving an electric vehicle, etc.)?

	Number	Percentage
Yes	24	14.5%
No	141	85.5%

Incentive Suggestions were:
- Flexible work schedule
- Bike parking/showers

4. If you usually drive alone to work, what prevents you from using other options such as carpooling, transit, biking or walking to get to work? (Select up to 3)

	Number	Percent
Transit service doesn't match my route/schedule	63	35%
Difficult to find others to carpool/vanpool	43	24%
Work late or irregular hours	63	35%
Cannot get home in an emergency	31	17%
Poor bike/walk access	13	7%
Use my car on the job	29	16%
Need to make stops on the way to work or home	54	30%
Prefer to drive my own car	45	25%

*Note: Because respondents were invited to select more than one answer, the percentages for each factor add up to more than 100%.

Comments about barriers to not driving alone to work included:
- Live close enough to work
- Live too far from work
- Irregular work schedules
- Transit connections are inconvenient/unsafe
- It is quicker to drive alone
- Parking is free
- Need to drop kids off at school on the way to work
- Need to make trips during the day

5. If you usually drive alone to work, what would encourage you to use a different way to get to work, such as carpooling, transit, biking or walking? (Select up to 3)

	Number	Percent
Financial incentives	69	38%
Guaranteed ride home in an emergency	26	14%
Awards/prizes	9	5%
Transit passes sold at work	12	7%
Help with transit information	11	6%
Shuttle between transit station and work place	15	8%
Special parking for carpools/vanpools	8	4%
Help finding carpool/vanpool partners	22	12%
Bike lockers/showers at work	14	8%
Better bike/walk access	12	7%
Work schedule flexibility	33	18%
On-site services (like banking, convenience store, dry cleaning)	13	7%

*Note: Because respondents were invited to select more than one answer, the percentages for each factor add up to more than 100%.

Comments about Incentive Suggestions were:
- Flexible work schedule
- Bike parking/showers

Based on survey responses, TAM also developed contact lists based on the following:
- 11 people interested in Carsharing
- 13 people interested in Emergency Ride Home
- 20 people interested in Carpooling
- 8 people interested in Carsharing, Emergency Ride Home, and Carpooling

TAM
COURT HOUSE SQUARE – SAN RAFAEL

TRANSPORTATION SURVEY RESULTS / NOVEMBER 2012

This report was produced by

511 Rideshare & Bicycling
70 Washington St, Suite 407
Oakland, CA 94607
(510) 273-3600

The preparation of this report has been financed in part by grants from the Federal Highway Administration, U.S. Department of Transportation. The contents of this report do not necessarily reflect the official views or policy of the U.S. Department of Transportation.

TAM
COURT HOUSE SQUARE – SAN RAFAEL

Table of Contents

TAM
Court House Square – San Rafael, CA
Employee Transportation Survey Results
November 2012

This survey is designed to help you improve your employees' commute. Shorter, less stressful commutes benefit employees individually. They also benefit your organization, as your employees arrive more rested. And, evidence suggests that employers whose employees use ridesharing alternatives have reduced absenteeism and improved employee retention. Finally, improving your employees' commute benefits the community. Encouraging your employees to rideshare removes cars from the road, reducing congestion and improving air quality.

At your organization, 73 employees participated in the survey. This survey was conducted from October 5 to October 10, 2012.

In the following sections, boldface questions are taken verbatim from the survey that was given to employees. Unless otherwise specified, the wording within the tables is also taken directly from the survey.

Section 1: How Employees Get To Work

To develop effective strategies to encourage the use of commute alternatives, you need to understand how your employees currently commute.

How did you get to work each day this week?

- Table 1 shows the aggregated commute mode for Monday through Sunday of the survey week
- Table 2 provides a detailed breakdown of employee commute mode for each day of the survey week

Your goal is to reduce the drive-alone rate and increase the use of commute alternatives. Your impact on congestion, parking and pollution will be greatest by getting commuters into modes such as transit, walking and bicycling that do not involve bringing a vehicle.

Look for commute alternatives that seem to be under-used. Which commute alternatives are currently most popular? Employee commute distance (Table 6) and home location (Tables 12 and 13) may help to explain employee commute mode choices. What services and incentives can you offer to increase the use of each alternative mode? Does employee commute mode vary significantly from day to day? If so, consider how you can reduce the drive alone rate on days where it is higher than normal.

Table 1 - Commute Mode Monday Through Sunday Combined

		Percent
Mode	Drove alone	84%
	Carpooled (2 to 6 people)	7%
	Vanpooled (7 to 15 people)	-
	Took public transit	3%
	Took a shuttle	-
	Rode a motorcycle	-
	Biked	1%
	Walked	4%
	I had a compressed work week day off (or a flex schedule)	0%
	I worked from home for a regular work day	1%
	I worked at a different location than my usual place	1%
	Total	100%

*Note: This table excludes instances where respondents selected “I didn’t work (because of day off, vacation, sick, other)”

Table 2 - Daily Commute Modes

	Mon	Tue	Wed	Thu	Fri	Sat	Sun
Drove alone	84%	84%	85%	78%	86%	1%	1%
Carpooled (2 to 6 people)	5%	5%	7%	11%	3%	-	1%
Vanpooled (7 to 15 people)	-	-	-	-	-	-	-
Took public transit	1%	4%	3%	4%	3%	-	-
Took a shuttle	-	-	-	-	-	-	-
Rode a motorcycle	-	-	-	-	-	-	-
Biked	-	-	-	1%	1%	-	-
Walked	4%	5%	4%	3%	3%	-	-
I had a compressed work week day off (or a flex schedule)	-	-	-	1%	-	-	-
I worked from home for a regular work day	3%	-	1%	1%	1%	-	-
I worked at a different location than my usual place	1%	-	-	-	1%	-	-
I didn't work (because of day off, vacation, sick, other)	1%	1%	-	-	1%	99%	97%
Total	100%	100%	100%	100%	100%	100%	100%

If you get to work in a carpool or vanpool, how many people are in the vehicle (including yourself)? (Table 3)

This question makes the distinction between carpools, with 2-6 passengers, and vanpools, with 7-15 passengers (often in a leased or company owned 7-15 passenger van). Using this distinction, 4 people commuting together in a mini-van would be considered a carpool, not a vanpool.

Table 3 - Rideshare Occupancy Rates

Average Carpool Ridership Average number of people per vehicle in carpools (2 to 6 people)	2.5 people per vehicle
Number of employees commuting by vanpool Number of people who said that they vanpool at least once a week	None
Average Vanpool Ridership Average number of people per vehicle in vanpools (7 to15 people)	NA
Combined Carpooling and Vanpooling Ridership Averages all responses to this question	2.5 people per vehicle

Section 2: Commute Distance and Time

What is the one-way distance (miles) between your home and the place where you work? (Table 4)

Commute distance often determines the types of commute alternatives that are most appropriate for your employees. Employees who live within 5 miles of the work site are good candidates for walking, bicycling, and transit. Medium distance commuters, who travel from 6 to 20 miles to work, are good candidates for transit and carpooling. Vanpooling, carpooling, and telecommuting may be good commute alternatives for long distance commuters who live more than 20 miles from the work site.

Table 4 - Distance Traveled to Work

		Number	Percent
Distance to Work	0-5 mi	21	29%
	6-10 mi	18	25%
	11-20 mi	14	19%
	21+ mi	19	26%
	Total	72	100%

The average one way commute distance is 14.8 miles.

Table 5 shows a breakdown of commute mode for each distance range. Look at the relationship between commute distance and commute mode for your work site. Do most employees live close to the work site? How does the drive-alone rate change at different distances? In planning your trip reduction program, focus on the distance ranges with the most employees (Table 5) and the highest drive-alone rates (Table 5). Once you identify target groups, consider which services and incentives would be most appropriate for the employees in these groups.

Commute mode by distance (Table 5)

Table 5 - Commute Mode by Distance

		Distance to Work			
		0-5 mi	6-10 mi	11-20 mi	21+ mi
Mode	Drove Alone	82%	81%	88%	85%
	Carpooled or Vanpooled	-	16%	3%	7%
	Took a Shuttle or Public Transit	2%	-	4%	6%
	Walked or Biked	15%	-	-	-
	All other options*	1%	3%	4%	1%
	Total	100%	100%	100%	100%

*Note: “All Other Options” includes Motorcycle, Telework/Telecommute, Compressed work week, and work at a different location.

For most types of business, the majority of employees start work between 6 a.m. and 10 a.m. There are two strategies related to work schedule that can reduce congestion. One is to move trips out of the peak period by allowing employees to flex their schedules toward the early or late end of the peak; the other is to concentrate arrival times to make shared rides more likely. Carpooling rates are normally higher during the “peak of the peak” (e.g., 7:30 to 8:30 am). A high concentration of employees arriving during the peak of the peak may increase carpool matching potential.

What time did you usually get to work this week? (Table 6)

Table 6 - Work Arrival Times

		Number	Percent
Time	Before 6 AM	1	1%
	6:00 to 6:59 AM	3	4%
	7:00 to 7:59 AM	7	10%
	8:00 to 8:59 AM	42	58%
	9:00 to 9:59 AM	18	25%
	10:00 AM or later	1	1%
	Total	72	100%

What time did you usually leave work this week? (Table 7)

Table 7 - Work Departure Times

		Number	Percent
Time	Before 3 PM	2	3%
	3:00 to 3:59 PM	2	3%
	4:00 to 4:59 PM	12	16%
	5:00 to 5:59 PM	42	58%
	6:00 to 6:59 PM	9	12%
	7:00 PM or later	6	8%
	Total	73	100%

Section 3: Factors That Influence Mode Choice

What is most important to you when you choose how you get to work? (Select up to 3) (Table 10)

This information can help you to understand the factors that motivate your employees' commute mode choices. You can use this to help develop your marketing and education efforts. Present commute alternatives with an emphasis on the factors that your employees consider important. For example, if travel time is important you could highlight the time saving advantages of carpool lanes. If cost is important, drive alone commuters may not understand what it actually costs to drive alone; educating employees about the true costs of driving is an appropriate and effective way to encourage carpooling and transit use.

Table 8 - Mode Choice Factors

		Number	Percent
Factor	Travel time	52	71%
	Convenience/Flexibility	45	62%
	Ability to make stops on the way to work or home	19	26%
	Cost	18	25%
	Reliability	11	15%
	Comfort & Safety	10	14%
	Stress	3	4%
	Reducing pollution, conserving energy	3	4%
	Total Respondents (N)*	73	NA

*Note: Because respondents were invited to select more than one answer, the percentages for each factor add up to more than 100%.

If you usually drive alone to work, what other ways would you be willing to try? (Select up to 3) (Table 9)

This question tells you which commute alternatives your employees are most willing to consider. Use this information to develop incentives and services to promote the most popular alternatives. For many employers, the most common answer is carpooling. Facilitating carpooling means matching employees and helping them to overcome obstacles to ridesharing. If transit use seems to have good potential, making route and schedule information available, selling passes on-site and/or subsidizing transit passes will encourage employees to use transit.

Table 9 - Potential Commute Alternatives for Solo Drivers

		Number	Percent
Mode	Work at home for a regular work day	34	51%
	Transit	29	43%
	Carpool	28	42%
	Bike	15	22%
	Walk	9	13%
	Vanpool	5	7%
	Total Respondents (N)*	67	NA

*Note: Because respondents were invited to select more than one answer, the percentages for each factor add up to more than 100%.

If you usually drive alone to work, why don't you use other ways (like carpooling, transit, biking or walking) to get to work? (Select up to 3) (Table 10)

This question asks solo drivers why they don't use commute alternatives. You could use this information to offer services that help to eliminate these obstacles. For example, if many employees are concerned that they will not be able to get home in an emergency, you can offer a guaranteed ride home service. If employees say that it is difficult to find others with whom to share a ride, think about how you can help them find carpool and vanpool matches among your own employees and those who work for nearby employers.

Table 10 - Reasons Why Solo Drivers Don't Use Commute Alternatives

		Number	Percent
Reason	Need to make stops on the way to work or home	26	37%
	Transit service doesn't match my route/schedule	25	36%
	Work late or irregular hours	24	34%
	Cannot get home in an emergency	20	29%
	Difficult to find others to carpool/vanpool	20	29%
	Use my car on the job	17	24%
	Prefer to drive my own car	16	23%
	Poor bike/walk access	5	7%
	Total Respondents (N)*	70	NA

*Note: Because respondents were invited to select more than one answer, the percentages for each factor add up to more than 100%.

If you usually drive alone to work, what would encourage you to use a different way to get to work (like carpooling, transit, biking or walking)? (Select up to 3) (Table 11)

Here drive-alone commuters reveal what it would take for them to consider a commute alternative. Since you will not be able to offer all incentives which interest employees, focus on those that will reduce the greatest number of drive alone trips. Match these responses with other information, such as commute distance and the modes individuals are most interested in trying.

Table 11 - Incentives to Use Commute Alternatives

		Number	Percent
Incentive	Financial incentives	26	41%
	Guaranteed ride home in an emergency	23	36%
	Work schedule flexibility	11	17%
	Better bike/walk access	10	16%
	Bike lockers/showers at work	10	16%
	Help finding carpool/vanpool partners	10	16%
	On-site services (banking, convenience store, dry cleaning)	8	13%
	Shuttle between transit station and work place	8	13%
	Special parking for carpools/vanpools	4	6%
	Help with transit information	4	6%
	Awards/prizes	4	6%
	Transit passes sold at work	3	5%
	Total Respondents (N)*	64	NA

*Note: Because respondents were invited to select more than one answer, the percentages for each factor add up to more than 100%.

Section 4: Custom Questions

Would you consider bike sharing or car sharing if a program was available near your workplace?

Custom Question - Sharing

		Number	Percent
Sharing	No	39	54%
	Yes	33	46%
	Total	72	100%

Does your company provide incentives or assistance to use public or alternative transportation (transit, carpool, vanpool, bicycling, walking, driving and electric vehicle, etc)?

Custom Question - Company

		Number	Percent
Company Incentives	No	56	79%
	Yes	6	8%
	Don't know	9	13%
	Total	71	100%

Section 5: Employee Home Locations

Home location obviously has a strong influence on employee commute mode. Table 12 shows the top five home locations for your employees, and Table 13 shows employee home zip codes for all survey respondents. This information is useful for identifying clusters of employees who could form carpools and vanpools. You can also identify appropriate transit information based on where clusters of employees live (e.g., bus routes) and make that information available. You might want to plot the data on a zip code map (available from the 511 Regional Rideshare & Bicycling Program).

Table 12 - Top Five Home Locations

		Number	Percent
Home Cities of the Respondents	San Rafael	19	26%
	Novato	8	11%
	Fairfax	6	8%
	Petaluma	5	7%
	San Francisco	4	5%
	Mill Valley	4	5%
	Total	46	62%

*Top 5 locations only

Table 13 - Home Zip Codes

			Number	Percent
Zip Code	94901	San Rafael	13	18%
	94930	Fairfax	6	8%
	94903	San Rafael	5	7%
	94952	Petaluma	4	5%
	94949	Novato	4	5%
	94941	Mill Valley	4	5%
	94960	San Anselmo	3	4%
	94928	Rohnert Park	3	4%
	94965	Sausalito	2	3%
	94947	Novato	2	3%
	94945	Novato	2	3%
	94509	Antioch	2	3%

	94115	San Francisco	2	3%
	95476	Sonoma	1	1%
	95404	Santa Rosa	1	1%
	94954	Petaluma	1	1%
	94939	Larkspur	1	1%
	94931	Cotati	1	1%
	94925	Corte Madera	1	1%
	94913	San Rafael	1	1%
	94904	Greenbrae	1	1%
	94707	Berkeley	1	1%
	94706	Albany	1	1%
	94703	Berkeley	1	1%
	94702	Berkeley	1	1%
	94610	Oakland	1	1%
	94605	Oakland	1	1%
	94591	Vallejo	1	1%
	94549	Lafayette	1	1%
	94531	Antioch	1	1%
	94530	El Cerrito	1	1%
	94501	Alameda	1	1%
	94117	San Francisco	1	1%
	94109	San Francisco	1	1%
	Total		73	100%

Section 6: Comments

- #10 needs excellent transit system as a choice!!

TAM
NOVATO

TRANSPORTATION SURVEY RESULTS / NOVEMBER 2012

This report was produced by

511 Rideshare & Bicycling
70 Washington St, Suite 407
Oakland, CA 94607
(510) 273-3600

The preparation of this report has been financed in part by grants from the Federal Highway Administration, U.S. Department of Transportation. The contents of this report do not necessarily reflect the official views or policy of the U.S. Department of Transportation.

TAM
NOVATO

Table of Contents

TAM
Novato, CA
Employee Transportation Survey Results
November 2012

This survey is designed to help you improve your employees' commute. Shorter, less stressful commutes benefit employees individually. They also benefit your organization, as your employees arrive more rested. And, evidence suggests that employers whose employees use ridesharing alternatives have reduced absenteeism and improved employee retention. Finally, improving your employees' commute benefits the community. Encouraging your employees to rideshare removes cars from the road, reducing congestion and improving air quality.

At your organization, 180 employees participated in the survey. This survey was conducted from October 22 to October 25, 2012.

In the following sections, boldface questions are taken verbatim from the survey that was given to employees. Unless otherwise specified, the wording within the tables is also taken directly from the survey.

Section 1: How Employees Get To Work

To develop effective strategies to encourage the use of commute alternatives, you need to understand how your employees currently commute.

How did you get to work each day this week?

- Table 1 shows the aggregated commute mode for Monday through Sunday of the survey week
- Table 2 provides a detailed breakdown of employee commute mode for each day of the survey week

Your goal is to reduce the drive-alone rate and increase the use of commute alternatives. Your impact on congestion, parking and pollution will be greatest by getting commuters into modes such as transit, walking and bicycling that do not involve bringing a vehicle.

Look for commute alternatives that seem to be under-used. Which commute alternatives are currently most popular? Employee commute distance (Table 6) and home location (Tables 12 and 13) may help to explain employee commute mode choices. What services and incentives can you offer to increase the use of each alternative mode? Does employee commute mode vary significantly from day to day? If so, consider how you can reduce the drive alone rate on days where it is higher than normal.

Table 1 - Commute Mode Monday Through Sunday Combined

		Percent
Mode	Drove alone	80%
	Carpooled (2 to 6 people)	10%
	Vanpooled (7 to 15 people)	-
	Took public transit	0%
	Took a shuttle	2%
	Rode a motorcycle	1%
	Biked	2%
	Walked	4%
	I had a compressed work week day off (or a flex schedule)	0%
	I worked from home for a regular work day	1%
	I worked at a different location than my usual place	1%
	Total	100%

*Note: This table excludes instances where respondents selected “I didn’t work (because of day off, vacation, sick, other)”

Table 2 - Daily Commute Modes

	Mon	Tue	Wed	Thu	Fri	Sat	Sun
Drove alone	79%	82%	81%	83%	80%	4%	2%
Carpooled (2 to 6 people)	8%	8%	9%	8%	7%	5%	5%
Vanpooled (7 to 15 people)	-	-	-	-	-	-	-
Took public transit	1%	1%	-	-	-	-	-
Took a shuttle	2%	2%	2%	2%	2%	-	-
Rode a motorcycle	1%	1%	1%	2%	2%	-	-
Biked	2%	2%	2%	2%	2%	-	-
Walked	3%	3%	3%	3%	3%	2%	2%
I had a compressed work week day off (or a flex schedule)	-	-	-	-	1%	-	-
I worked from home for a regular work day	1%	1%	1%	1%	2%	-	-
I worked at a different location than my usual place	-	1%	1%	-	1%	1%	1%
I didn't work (because of day off, vacation, sick, other)	3%	-	-	-	1%	89%	91%
Total	100%	100%	100%	100%	100%	100%	100%

If you get to work in a carpool or vanpool, how many people are in the vehicle (including yourself)? (Table 3)

This question makes the distinction between carpools, with 2-6 passengers, and vanpools, with 7-15 passengers (often in a leased or company owned 7-15 passenger van). Using this distinction, 4 people commuting together in a mini-van would be considered a carpool, not a vanpool.

Table 3 - Rideshare Occupancy Rates

Average Carpool Ridership Average number of people per vehicle in carpools (2 to 6 people)	2.5 people per vehicle
Number of employees commuting by vanpool Number of people who said that they vanpool at least once a week	None*
Average Vanpool Ridership Average number of people per vehicle in vanpools (7 to15 people)	NA*
Combined Carpooling and Vanpooling Ridership Averages all responses to this question	2.5 people per vehicle

*Note: 4 respondents identify as participating in a carpool but have an occupancy of 7.

Section 2: Commute Distance and Time

What is the one-way distance (miles) between your home and the place where you work? (Table 4)

Commute distance often determines the types of commute alternatives that are most appropriate for your employees. Employees who live within 5 miles of the work site are good candidates for walking, bicycling, and transit. Medium distance commuters, who travel from 6 to 20 miles to work, are good candidates for transit and carpooling. Vanpooling, carpooling, and telecommuting may be good commute alternatives for long distance commuters who live more than 20 miles from the work site.

Table 4 - Distance Traveled to Work

		Number	Percent
Distance to Work	0-5 mi	32	18%
	6-10 mi	33	19%
	11-20 mi	35	20%
	21+ mi	77	44%
	Total	177	100%

The average one way commute distance is 19.3 miles.

Table 5 shows a breakdown of commute mode for each distance range. Look at the relationship between commute distance and commute mode for your work site. Do most employees live close to the work site? How does the drive-alone rate change at different distances? In planning your trip reduction program, focus on the distance ranges with the most employees (Table 5) and the highest drive-alone rates (Table 5). Once you identify target groups, consider which services and incentives would be most appropriate for the employees in these groups.

Commute mode by distance (Table 5)

Table 5 - Commute Mode by Distance

		Distance to Work			
		0-5 mi	6-10 mi	11-20 mi	21+ mi
Mode	Drove Alone	76%	86%	83%	85%
	Carpooled or Vanpooled	-	2%	14%	10%
	Took a Shuttle or Public Transit	-	9%	-	1%
	Walked or Biked	21%	3%	3%	1%
	All other options*	3%	-	-	2%
	Total	100%	100%	100%	100%

*Note: "All Other Options" includes Motorcycle, Telework/Telecommute, Compressed work week, and work at a different location.

For most types of business, the majority of employees start work between 6 a.m. and 10 a.m. There are two strategies related to work schedule that can reduce congestion. One is to move trips out of the peak period by allowing employees to flex their schedules toward the early or late end of the peak; the other is to concentrate arrival times to make shared rides more likely. Carpooling rates are normally higher during the "peak of the peak" (e.g., 7:30 to 8:30 am). A high concentration of employees arriving during the peak of the peak may increase carpool matching potential.

What time did you usually get to work this week? (Table 6)

Table 6 - Work Arrival Times

		Number	Percent
Time	Before 6 AM	2	1%
	6:00 to 6:59 AM	6	3%
	7:00 to 7:59 AM	15	8%
	8:00 to 8:59 AM	70	39%
	9:00 to 9:59 AM	66	37%
	10:00 AM or later	20	11%
	Total	179	100%

What time did you usually leave work this week? (Table 7)

Table 7 - Work Departure Times

		Number	Percent
Time	Before 3 PM	1	1%
	3:00 to 3:59 PM	5	3%
	4:00 to 4:59 PM	19	11%
	5:00 to 5:59 PM	54	30%
	6:00 to 6:59 PM	52	29%
	7:00 PM or later	47	26%
	Total	178	100%

Section 3: Factors That Influence Mode Choice

What is most important to you when you choose how you get to work? (Select up to 3) (Table 10)

This information can help you to understand the factors that motivate your employees' commute mode choices. You can use this to help develop your marketing and education efforts. Present commute alternatives with an emphasis on the factors that your employees consider important. For example, if travel time is important you could highlight the time saving advantages of carpool lanes. If cost is important, drive alone commuters may not understand what it actually costs to drive alone; educating employees about the true costs of driving is an appropriate and effective way to encourage carpooling and transit use.

Table 8 - Mode Choice Factors

		Number	Percent
Factor	Convenience/Flexibility	122	68%
	Travel time	114	64%
	Cost	61	34%
	Reliability	45	25%
	Ability to make stops on the way to work or home	26	15%
	Stress	17	9%
	Comfort & Safety	16	9%
	Reducing pollution, conserving energy	15	8%
	Total Respondents (N)*	179	NA

*Note: Because respondents were invited to select more than one answer, the percentages for each factor add up to more than 100%.

If you usually drive alone to work, what other ways would you be willing to try? (Select up to 3) (Table 9)

This question tells you which commute alternatives your employees are most willing to consider. Use this information to develop incentives and services to promote the most popular alternatives. For many employers, the most common answer is carpooling. Facilitating carpooling means matching employees and helping them to overcome obstacles to ridesharing. If transit use seems to have good potential, making route and schedule information available, selling passes on-site and/or subsidizing transit passes will encourage employees to use transit.

Table 9 - Potential Commute Alternatives for Solo Drivers

		Number	Percent
Mode	Work at home for a regular work day	78	52%
	Carpool	69	46%
	Transit	65	43%
	Bike	43	29%
	Vanpool	25	17%
	Walk	8	5%
	Total Respondents (N)*	150	NA

*Note: Because respondents were invited to select more than one answer, the percentages for each factor add up to more than 100%.

If you usually drive alone to work, why don't you use other ways (like carpooling, transit, biking or walking) to get to work? (Select up to 3) (Table 10)

This question asks solo drivers why they don't use commute alternatives. You could use this information to offer services that help to eliminate these obstacles. For example, if many employees are concerned that they will not be able to get home in an emergency, you can offer a guaranteed ride home service. If employees say that it is difficult to find others with whom to share a ride, think about how you can help them find carpool and vanpool matches among your own employees and those who work for nearby employers.

Table 10 - Reasons Why Solo Drivers Don't Use Commute Alternatives

		Number	Percent
Reason	Work late or irregular hours	81	52%
	Transit service doesn't match my route/schedule	81	52%
	Need to make stops on the way to work or home	51	33%
	Difficult to find others to carpool/vanpool	44	28%
	Cannot get home in an emergency	36	23%
	Prefer to drive my own car	35	23%
	Use my car on the job	20	13%
	Poor bike/walk access	19	12%
	Total Respondents (N)*	155	NA

*Note: Because respondents were invited to select more than one answer, the percentages for each factor add up to more than 100%.

If you usually drive alone to work, what would encourage you to use a different way to get to work (like carpooling, transit, biking or walking)? (Select up to 3) (Table 11)

Here drive-alone commuters reveal what it would take for them to consider a commute alternative. Since you will not be able to offer all incentives which interest employees, focus on those that will reduce the greatest number of drive alone trips. Match these responses with other information, such as commute distance and the modes individuals are most interested in trying.

Table 11 - Incentives to Use Commute Alternatives

		Number	Percent
Incentive	Financial incentives	55	39%
	Shuttle between transit station and work place	48	34%
	Guaranteed ride home in an emergency	43	30%
	Work schedule flexibility	42	30%
	On-site services (banking, convenience store, dry cleaning)	24	17%
	Better bike/walk access	23	16%
	Help finding carpool/vanpool partners	22	16%
	Help with transit information	14	10%
	Bike lockers/showers at work	12	9%
	Transit passes sold at work	12	9%
	Awards/prizes	7	5%
	Special parking for carpools/vanpools	3	2%
	Total Respondents (N)*	141	NA

*Note: Because respondents were invited to select more than one answer, the percentages for each factor add up to more than 100%.

Section 4: Custom Questions

Would you consider bike sharing if a program was available near your workplace?

Custom Question - Sharing Bike

		Number	Percent
Sharing Bike	No	121	75%
	Yes	41	25%
	Total	162	100%

Would you consider car sharing if a program was available near your workplace?

Custom Question - Sharing Car

		Number	Percent
Sharing Car	No	91	56%
	Yes	71	44%
	Total	162	100%

Does your company provide incentives or assistance to use public or alternative transportation (transit, carpool, vanpool, bicycling, walking, driving and electric vehicle, etc)?

Custom Question - Company

		Number	Percent
Company Incentives	No	88	53%
	Yes	17	10%
	Don't know	60	36%
	Total	165	100%

Section 5: Employee Home Locations

Home location obviously has a strong influence on employee commute mode. Table 12 shows the top five home locations for your employees, and Table 13 shows employee home zip codes for all survey respondents. This information is useful for identifying clusters of employees who could form carpools and vanpools. You can also identify appropriate transit information based on where clusters of employees live (e.g., bus routes) and make that information available. You might want to plot the data on a zip code map (available from the 511 Regional Rideshare & Bicycling Program).

Table 12 - Top Five Home Locations

		Number	Percent
Home Cities of the Respondents	Novato	48	27%
	San Francisco	26	14%
	San Rafael	18	10%
	Petaluma	12	7%
	Mill Valley	7	4%
	Berkeley	7	4%
	Total	118	66%

*Top 5 locations only

Table 13 - Home Zip Codes

			Number	Percent
Zip Code	94949	Novato	21	12%
	94947	Novato	18	10%
	94903	San Rafael	11	6%
	94945	Novato	9	5%
	94954	Petaluma	8	4%
	94941	Mill Valley	7	4%
	94901	San Rafael	7	4%
	94118	San Francisco	7	4%
	94928	Rohnert Park	6	3%
	94952	Petaluma	4	2%
	94939	Larkspur	4	2%
	94115	San Francisco	4	2%

	94102	San Francisco	4	2%
	94930	Fairfax	3	2%
	94702	Berkeley	3	2%
	94591	Vallejo	3	2%
	94109	San Francisco	3	2%
	95472	Sebastopol	2	1%
	95404	Santa Rosa	2	1%
	94965	Sausalito	2	1%
	94960	San Anselmo	2	1%
	94608	Emeryville	2	1%
	94590	Vallejo	2	1%
	94530	El Cerrito	2	1%
	94123	San Francisco	2	1%
	95687	Vacaville	1	1%
	95607	Capay	1	1%
	95476	Sonoma	1	1%
	95407	Santa Rosa	1	1%
	95405	Santa Rosa	1	1%
	95403	Santa Rosa	1	1%
	95401	Santa Rosa	1	1%
	95135	San Jose	1	1%
	94973	Woodacre	1	1%
	94972	Valley Ford	1	1%
	94951	Penngrove	1	1%
	94925	Corte Madera	1	1%
	94920	Belvedere Tiburon	1	1%
	94907	Unkown	1	1%
	94905	Unkown	1	1%
	94806	San Pablo	1	1%
	94805	Richmond	1	1%

	94709	Berkeley	1	1%
	94708	Berkeley	1	1%
	94707	Berkeley	1	1%
	94704	Berkeley	1	1%
	94611	Oakland	1	1%
	94606	Oakland	1	1%
	94605	Oakland	1	1%
	94603	Oakland	1	1%
	94602	Oakland	1	1%
	94601	Oakland	1	1%
	94577	San Leandro	1	1%
	94549	Lafayette	1	1%
	94533	Fairfield	1	1%
	94526	Danville	1	1%
	94510	Benicia	1	1%
	94503	American Canyon	1	1%
	94501	Alameda	1	1%
	94402	San Mateo	1	1%
	94129	San Francisco	1	1%
	94122	San Francisco	1	1%
	94121	San Francisco	1	1%
	94114	San Francisco	1	1%
	94111	San Francisco	1	1%
	94107	San Francisco	1	1%
	94061	Redwood City	1	1%
	Total		180	100%

TAM
SAUSALITO

TRANSPORTATION SURVEY RESULTS / NOVEMBER 2012

This report was produced by

511 Rideshare & Bicycling
70 Washington St, Suite 407
Oakland, CA 94607
(510) 273-3600

The preparation of this report has been financed in part by grants from the Federal Highway Administration, U.S. Department of Transportation. The contents of this report do not necessarily reflect the official views or policy of the U.S. Department of Transportation.

TAM
SAUSALITO

Table of Contents

TAM
Sausalito, CA
Employee Transportation Survey Results
November 2012

This survey is designed to help you improve your employees' commute. Shorter, less stressful commutes benefit employees individually. They also benefit your organization, as your employees arrive more rested. And, evidence suggests that employers whose employees use ridesharing alternatives have reduced absenteeism and improved employee retention. Finally, improving your employees' commute benefits the community. Encouraging your employees to rideshare removes cars from the road, reducing congestion and improving air quality.

At your organization, 69 employees participated in the survey. This survey was conducted from November 8 to November 14, 2012.

In the following sections, boldface questions are taken verbatim from the survey that was given to employees. Unless otherwise specified, the wording within the tables is also taken directly from the survey.

Section 1: How Employees Get To Work

To develop effective strategies to encourage the use of commute alternatives, you need to understand how your employees currently commute.

How did you get to work each day this week?

- Table 1 shows the aggregated commute mode for Monday through Sunday of the survey week
- Table 2 provides a detailed breakdown of employee commute mode for each day of the survey week

Your goal is to reduce the drive-alone rate and increase the use of commute alternatives. Your impact on congestion, parking and pollution will be greatest by getting commuters into modes such as transit, walking and bicycling that do not involve bringing a vehicle.

Look for commute alternatives that seem to be under-used. Which commute alternatives are currently most popular? Employee commute distance (Table 6) and home location (Tables 12 and 13) may help to explain employee commute mode choices. What services and incentives can you offer to increase the use of each alternative mode? Does employee commute mode vary significantly from day to day? If so, consider how you can reduce the drive alone rate on days where it is higher than normal.

Table 1 - Commute Mode Monday Through Sunday Combined

		Percent
Mode	Drove alone	77%
	Carpooled (2 to 6 people)	11%
	Vanpooled (7 to 15 people)	-
	Took public transit	3%
	Took a shuttle	-
	Rode a motorcycle	-
	Biked	3%
	Walked	4%
	I had a compressed work week day off (or a flex schedule)	-
	I worked from home for a regular work day	2%
	I worked at a different location than my usual place	-
	Total	100%

*Note: This table excludes instances where respondents selected “I didn’t work (because of day off, vacation, sick, other)”

Table 2 - Daily Commute Modes

	Mon	Tue	Wed	Thu	Fri	Sat	Sun
Drove alone	78%	74%	78%	76%	76%	2%	3%
Carpooled (2 to 6 people)	12%	13%	9%	9%	10%	-	-
Vanpooled (7 to 15 people)	-	-	-	-	-	-	-
Took public transit	3%	6%	3%	1%	3%	-	-
Took a shuttle	-	-	-	-	-	-	-
Rode a motorcycle	-	-	-	-	-	-	-
Biked	1%	1%	4%	6%	3%	-	-
Walked	4%	4%	4%	4%	4%	-	-
I had a compressed work week day off (or a flex schedule)	-	-	-	-	-	-	-
I worked from home for a regular work day	1%	1%	1%	3%	1%	-	-
I worked at a different location than my usual place	-	-	-	-	-	-	-
I didn't work (because of day off, vacation, sick, other)	-	-	-	-	1%	98%	97%
Total	100%	100%	100%	100%	100%	100%	100%

If you get to work in a carpool or vanpool, how many people are in the vehicle (including yourself)? (Table 3)

This question makes the distinction between carpools, with 2-6 passengers, and vanpools, with 7-15 passengers (often in a leased or company owned 7-15 passenger van). Using this distinction, 4 people commuting together in a mini-van would be considered a carpool, not a vanpool.

Table 3 - Rideshare Occupancy Rates

Average Carpool Ridership Average number of people per vehicle in carpools (2 to 6 people)	2.5 people per vehicle
Number of employees commuting by vanpool Number of people who said that they vanpool at least once a week	None
Average Vanpool Ridership Average number of people per vehicle in vanpools (7 to15 people)	NA
Combined Carpooling and Vanpooling Ridership Averages all responses to this question	2.5 people per vehicle

Section 2: Commute Distance and Time

What is the one-way distance (miles) between your home and the place where you work? (Table 4)

Commute distance often determines the types of commute alternatives that are most appropriate for your employees. Employees who live within 5 miles of the work site are good candidates for walking, bicycling, and transit. Medium distance commuters, who travel from 6 to 20 miles to work, are good candidates for transit and carpooling. Vanpooling, carpooling, and telecommuting may be good commute alternatives for long distance commuters who live more than 20 miles from the work site.

Table 4 - Distance Traveled to Work

		Number	Percent
Distance to Work	0-5 mi	15	22%
	6-10 mi	20	30%
	11-20 mi	22	33%
	21+ mi	10	15%
	Total	67	100%

The average one way commute distance is 14.0 miles.

Table 5 shows a breakdown of commute mode for each distance range. Look at the relationship between commute distance and commute mode for your work site. Do most employees live close to the work site? How does the drive-alone rate change at different distances? In planning your trip reduction program, focus on the distance ranges with the most employees (Table 5) and the highest drive-alone rates (Table 5). Once you identify target groups, consider which services and incentives would be most appropriate for the employees in these groups.

Commute mode by distance (Table 5)

Table 5 - Commute Mode by Distance

		Distance to Work			
		0-5 mi	6-10 mi	11-20 mi	21+ mi
Mode	Drove Alone	57%	89%	86%	63%
	Carpooled or Vanpooled	13%	10%	5%	26%
	Took a Shuttle or Public Transit	-	-	8%	5%
	Walked or Biked	29%	1%	-	7%
	All other options*	-	-	1%	-
	Total	100%	100%	100%	100%

*Note: “All Other Options” includes Motorcycle, Telework/Telecommute, Compressed work week, and work at a different location.

For most types of business, the majority of employees start work between 6 a.m. and 10 a.m. There are two strategies related to work schedule that can reduce congestion. One is to move trips out of the peak period by allowing employees to flex their schedules toward the early or late end of the peak; the other is to concentrate arrival times to make shared rides more likely. Carpooling rates are normally higher during the “peak of the peak” (e.g., 7:30 to 8:30 am). A high concentration of employees arriving during the peak of the peak may increase carpool matching potential.

What time did you usually get to work this week? (Table 6)

Table 6 - Work Arrival Times

		Number	Percent
Time	Before 6 AM	2	3%
	6:00 to 6:59 AM	5	7%
	7:00 to 7:59 AM	10	15%
	8:00 to 8:59 AM	25	37%
	9:00 to 9:59 AM	20	29%
	10:00 AM or later	6	9%
	Total	68	100%

What time did you usually leave work this week? (Table 7)

Table 7 - Work Departure Times

		Number	Percent
Time	Before 3 PM	2	3%
	3:00 to 3:59 PM	5	7%
	4:00 to 4:59 PM	5	7%
	5:00 to 5:59 PM	24	35%
	6:00 to 6:59 PM	19	28%
	7:00 PM or later	13	19%
	Total	68	100%

Section 3: Factors That Influence Mode Choice

What is most important to you when you choose how you get to work? (Select up to 3) (Table 10)

This information can help you to understand the factors that motivate your employees' commute mode choices. You can use this to help develop your marketing and education efforts. Present commute alternatives with an emphasis on the factors that your employees consider important. For example, if travel time is important you could highlight the time saving advantages of carpool lanes. If cost is important, drive alone commuters may not understand what it actually costs to drive alone; educating employees about the true costs of driving is an appropriate and effective way to encourage carpooling and transit use.

Table 8 - Mode Choice Factors

		Number	Percent
Factor	Convenience/Flexibility	46	67%
	Travel time	44	64%
	Cost	27	39%
	Ability to make stops on the way to work or home	14	20%
	Reliability	13	19%
	Comfort & Safety	10	14%
	Stress	9	13%
	Reducing pollution, conserving energy	7	10%
	Total Respondents (N)*	69	NA

*Note: Because respondents were invited to select more than one answer, the percentages for each factor add up to more than 100%.

If you usually drive alone to work, what other ways would you be willing to try? (Select up to 3) (Table 9)

This question tells you which commute alternatives your employees are most willing to consider. Use this information to develop incentives and services to promote the most popular alternatives. For many employers, the most common answer is carpooling. Facilitating carpooling means matching employees and helping them to overcome obstacles to ridesharing. If transit use seems to have good potential, making route and schedule information available, selling passes on-site and/or subsidizing transit passes will encourage employees to use transit.

Table 9 - Potential Commute Alternatives for Solo Drivers

		Number	Percent
Mode	Work at home for a regular work day	29	49%
	Transit	29	49%
	Carpool	19	32%
	Bike	14	24%
	Vanpool	11	19%
	Walk	5	8%
	Total Respondents (N)*	59	NA

*Note: Because respondents were invited to select more than one answer, the percentages for each factor add up to more than 100%.

If you usually drive alone to work, why don't you use other ways (like carpooling, transit, biking or walking) to get to work? (Select up to 3) (Table 10)

This question asks solo drivers why they don't use commute alternatives. You could use this information to offer services that help to eliminate these obstacles. For example, if many employees are concerned that they will not be able to get home in an emergency, you can offer a guaranteed ride home service. If employees say that it is difficult to find others with whom to share a ride, think about how you can help them find carpool and vanpool matches among your own employees and those who work for nearby employers.

Table 10 - Reasons Why Solo Drivers Don't Use Commute Alternatives

		Number	Percent
Reason	Transit service doesn't match my route/schedule	35	58%
	Work late or irregular hours	32	53%
	Need to make stops on the way to work or home	20	33%
	Difficult to find others to carpool/vanpool	18	30%
	Prefer to drive my own car	14	23%
	Cannot get home in an emergency	10	17%
	Use my car on the job	8	13%
	Poor bike/walk access	5	8%
	Total Respondents (N)*	60	NA

*Note: Because respondents were invited to select more than one answer, the percentages for each factor add up to more than 100%.

If you usually drive alone to work, what would encourage you to use a different way to get to work (like carpooling, transit, biking or walking)? (Select up to 3) (Table 11)

Here drive-alone commuters reveal what it would take for them to consider a commute alternative. Since you will not be able to offer all incentives which interest employees, focus on those that will reduce the greatest number of drive alone trips. Match these responses with other information, such as commute distance and the modes individuals are most interested in trying.

Table 11 - Incentives to Use Commute Alternatives

		Number	Percent
Incentive	Financial incentives	29	58%
	Shuttle between transit station and work place	16	32%
	Help finding carpool/vanpool partners	14	28%
	Work schedule flexibility	13	26%
	Guaranteed ride home in an emergency	11	22%
	Awards/prizes	9	18%
	Transit passes sold at work	5	10%
	Better bike/walk access	4	8%
	Bike lockers/showers at work	3	6%
	Help with transit information	3	6%
	Special parking for carpools/vanpools	2	4%
	On-site services (banking, convenience store, dry cleaning)	1	2%
	Total Respondents (N)*	50	NA

*Note: Because respondents were invited to select more than one answer, the percentages for each factor add up to more than 100%.

Section 4: Custom Questions

Would you consider bike sharing if a program was available near your workplace?

Custom Question - Sharing Bike

		Number	Percent
Bike Sharing	No	52	80%
	Yes	13	20%
	Total	65	100%

Would you consider car sharing if a program was available near your workplace?

Custom Question - Sharing Car

		Number	Percent
Car Sharing	No	36	54%
	Yes	31	46%
	Total	67	100%

Does your company provide incentives or assistance to use public or alternative transportation (transit, carpool, vanpool, bicycling, walking, driving and electric vehicle, etc)?

Custom Question - Company

		Number	Percent
Company Incentives	No	52	78%
	Yes	6	9%
	Don't know	9	13%
	Total	67	100%

Section 5: Employee Home Locations

Home location obviously has a strong influence on employee commute mode. Table 12 shows the top five home locations for your employees, and Table 13 shows employee home zip codes for all survey respondents. This information is useful for identifying clusters of employees who could form carpools and vanpools. You can also identify appropriate transit information based on where clusters of employees live (e.g., bus routes) and make that information available. You might want to plot the data on a zip code map (available from the 511 Regional Rideshare & Bicycling Program).

Table 12 - Top Five Home Locations

		Number	Percent
Home Cities of the Respondents	San Francisco	18	26%
	Mill Valley	11	16%
	San Rafael	8	12%
	Sausalito	7	10%
	Novato	6	9%
	Greenbrae	6	9%
	Total	69	100%

*Top 5 locations only

Table 13 - Home Zip Codes

			Number	Percent
Zip Code	94941	Mill Valley	11	16%
	94965	Sausalito	7	10%
	94904	Greenbrae	6	9%
	94903	San Rafael	6	9%
	94118	San Francisco	4	6%
	94949	Novato	3	4%
	94122	San Francisco	3	4%
	94947	Novato	2	3%
	94939	Larkspur	2	3%
	94920	Belvedere Tiburon	2	3%
	94901	San Rafael	2	3%
	94117	San Francisco	2	3%

	94116	San Francisco	2	3%
	94109	San Francisco	2	3%
	95409	Santa Rosa	1	1%
	95136	San Jose	1	1%
	94954	Petaluma	1	1%
	94952	Petaluma	1	1%
	94945	Novato	1	1%
	94925	Corte Madera	1	1%
	94801	Richmond	1	1%
	94611	Oakland	1	1%
	94606	Oakland	1	1%
	94158	San Francisco	1	1%
	94133	San Francisco	1	1%
	94124	San Francisco	1	1%
	94123	San Francisco	1	1%
	94107	San Francisco	1	1%
	94005	Brisbane	1	1%
	Total		69	100%

Survey of Employers

As support for TAM and 511.org activities, Marin Economic Forum (MEF) used its connections to Marin County local businesses, specifically small to medium-sized businesses, to facilitate focus groups and surveys concerning commute choices and options for workers and business needs. These links to the greater business community are part of MEF's mission as a hub of information and networking for Marin County's economy. Both TAM and 511.org are seeking ways to expand their coverage and breadth of services to local businesses in Marin County, and for Marin County businesses to more completely utilize alternative commute options instead of relying on single occupant vehicle trips.

The focus groups and surveys were administered through chamber and employer contacts, as well as MEF contacts with city councils and the Board of Supervisors, asking about the attitudes, knowledge and behaviors of businesses concerning commute/vehicle trip issues:

- Attitudes: What is the business' stand on these issues currently and why does that attitude exist?
- Knowledge: What does the leader know or not know about the data, the environmental issues, the flow of workers in and out of Marin County?
- Behaviors: What has the leader done with respect to advocating, volunteerism, funding, or other engagement with these issues and potential solutions?

This section discusses the organization, facilitation, attendance, and the findings from five in-person focus groups conducted between November 2012 and March 2013, a virtual focus group with the Sausalito Chamber of Commerce Leadership Institute, and an employer survey of 20 businesses.

The five in-person focus groups were:

San Rafael Chamber Economic Vitality Committee (12 people)
Novato Chamber of Commerce Leadership Institute (17)
San Rafael Chamber of Commerce Leadership Institute (12)
Marin County Chambers of Commerce, Chief Executive Officers (12)
Marin Economic Forum Board of Directors (28)

Dr. Eyler also conducted a virtual focus group with the Sausalito Chamber of Commerce Leadership Institute (7 participants) which submitted a single e-response reflecting views of the group. A total of 88 people participated in the six focus groups.

The employer survey was distributed by email to small and mid-sized businesses throughout Marin; 20 responses were received. Below is a description of the results from the Focus Groups, and the Survey.

Employer Focus Group Questions and Responses

1. How do your employees commute to work?

In the focus groups, there was a mix of responses to this question, where many workers were coming to work in single occupant car trips. Some of the respondents were coming in public transportation. Kaiser was the standout in terms of combining a sophisticated vanpool network, public transportation, and bike travel.

2. What are issues/challenges for you as an employer about your employees' commute?

The major items that came up in our focus groups on issues and challenges was the loss of time in commute or the higher wages that are sometimes needed to retain and support employees with longer and more costly commutes. Most employers have made adjustments to work schedules and to their performance metrics if commuting issues exist.

3. What comes to mind when we say "ridesharing" or "commute alternatives?"

Very few respondents knew the definition of "ridesharing" or "commute alternatives" by name. In most cases, the focus groups began with an explanation of these alternatives, and it became obvious during the discussions that marketing the wide array of alternatives available is a major next step. TAM and 511.org staff that came to the focus groups provided explanations about commute alternatives, ways to access alternatives, and whether the alternatives needed to come from the employer or the employee.

In many cases, focus group members were excited about the alternatives available and the possibilities of considering ways to expand on these themes.

4. Have these "commute alternatives" been considered much personally or by the company for its employees?

In some cases, specifically in health care and municipal employers, alternative commute options were discussed at length. The ability to match schedules or to locate alternative transportation options in specific places for employees to use was perceived to be an impediment to using alternative commute options. From the employee standpoint, issues of convenience, reliability, and flexibility were consistent themes. What is missing from many alternative transportation options is intraday flexibility.

Some companies are participating in the IRS Commuter Choice Program , which provides employers an opportunity to reduce payroll taxes while at the same time gives employees a chance to significantly reduce transit, vanpool and some bicycle maintenance commute expenses. What was surprising was the number of businesses that had not heard of this IRS program. Furthermore, with the recent passage of SB1339 and the anticipated mandate requiring employers with 50 or more employees to provide commute support (including the option of allowing them to take advantage of the IRS pre-tax program), there is a clear need for more and better outreach to educate employers about their options. TAM is working to coordinate with Bay Area Air Quality Management District (BAAQMD) and 511.org on outreach to inform employers about ways to comply with SB1339 by the anticipated deadline of mid-2014.

5. Is parking near work an issue for your employees? Is it free and easy to use?

Parking was perceived as a problem for most focus group participants. In some cases, negative attitudes were driven more by work location and culture, rather than by reality. For example, those businesses in downtown San Rafael, San Anselmo, Mill Valley, and Sausalito all suggested that the lack of unmetered parking and of parking facilities in general, and inflexible parking enforcement were issues for employees.

Focus Group stories were varied and usually personal; for example, San Anselmo has a parking program where an employer can purchase a $25/year parking exemption from metering in the downtown for employees or for themselves as business owners. This practice, while applauded by some, limited supply of employee/employer parking for other businesses who were not able to get in the front door fast enough when parking passes were made available, and parking shortages for customers of retail and restaurant businesses. This can be an issue for businesses considering a San Anselmo location. Businesses from Mill Valley, Sausalito, and Larkspur suggested similar issues.

In other cases, such as Corte Madera, parking was plentiful and generally free, and not an issue for merchants, employers, and customers. It is important to realize that we asked these questions in a snapshot format, and there was not discussion or questions about potential expansion of infrastructure.

6. Are you familiar with organizations that provide assistance on commute alternatives? Have you heard of 511.org or Transportation Authority of Marin (TAM)? If so, what is your impression of those organizations?

This was a key result from the focus groups and information gathered. The impressions were good, for those that knew each organization (TAM and 511.org).

Most had heard of 511.org, primarily through the signage on the freeways and the alert billboards. The 511.org ride matching services were known by folks but usually treated with some skepticism in terms of being technologically efficient and on the cutting edge; it was also stated numerous times that the time spent on signing up for 511.org rideshare or the emergency ride program was long and the forms were more time-consuming than expected.

Some had heard of TAM; when we spoke with focus groups where elected officials and staff from a municipal organization were present, the amount of awareness increased. TAM's emergency ride home program was unknown to most; the carpool or vanpool incentives were also basically unknown.

Some people did not understand the roles and responsibilities of SMART vs. MTC. This was also true for some about the roles and responsibilities of TAM and 511.org. One resulting idea is to advertise more completely to Marin-based employers, and expand education and marketing for both 511.org and TAM in Marin County.

7. Please identify 511.org services for which you may be aware or what services for which you may want more information.

This question asked about knowledge and attitude toward information about 511.org services available. Table 1 shows the general results from the focus groups. These results will be in contrast to the individual employer surveys discussed later in this report.

Type of Services	Aware? (Yes or No)	Want more info? (Yes or No)
a. Carpool/Vanpool Matching (or match lists)	Some	Yes
b. Vanpools (for 7-15 employees)	Some	Yes
c. Commuter Choice Tax Benefit (IRS pre-tax) (ask about the new State law if over 50 employees with the idea of providing information only?)	Few	Yes
d. Alternative Work Schedules	Many	Yes
e. Telework	Many	Yes
f. Density Maps/Maps Generally	No	Yes
g. Surveys	No	Yes
h. Bicycling/Walking information	No	Yes
i. Emergency/Guaranteed Ride Home Program	Few	Yes
j. On-Site Events (i.e., for those interested in ride sharing)	No	Yes
k. Incentives for carpooling or vanpooling	Some	Yes
l. Assistance for developing a commuter program	Few	Yes

7. Does your organization provide information to employees about alternative ways to travel to work (e.g., carpooling, transit, biking or walking)?

Very few organizations that participated in the focus groups, short of those with a large number of employees or those that represented municipal organizations, suggested that they had provided information about alternative transportation to and from work. In many cases, it was a lack of knowledge about the services, programs and possibilities. In other cases, it was not a priority. However, as suggested above, almost all participants were willing to find out more about TDM programs as a beginning to distributing the information to employees.

8. **If gas prices reach $5/gal and stabilize there for an entire year, what would the impact be on your employees and on your business? What if gas prices reached $10/gal?**

This was our "curve ball" question. In many cases, the respondents suggested that such a change would not affect commutes. They did say that $10/gal could be a deal breaker; at $5/gal, little was likely to change. The facilitator discussed the ideas of cyclical or transitory change versus permanent change, which is the goal of many programs to shift people culturally from their single occupant vehicle trip to a more efficient way of getting to work. Many respondents said that despite having to incur the costs of driving alone and the price of gas, they prefer this option since it provides freedom and the alternatives lack flexibility.

9. **Having access to a shared (hourly rental) bicycle, car during the day increases the commute options for those who may be willing to walk, use transit, or share their commute travel in some other way such as in a carpool or vanpool. Would your company be willing to promote the use of a shared-bike program (i.e., employees could rent a bike for midday work travel or personal errands) if hourly rentals were located nearby?**

For the bike share program, three major issues came up (which, although surprising, were corroborated in the individual survey results):

- Bike programs might not work very well in Marin due to safety issues because Marin County does not have the necessary bicycle safety infrastructure
- Some felt that a bike share program would be used more by men, due to the challenges of Marin's hilly geography and that women wearing skirts may not readily want to ride a bike
- Marin's topography was perceived to limit the ability to implement, use or expand a bike share program

One solution posited included using a health club as a strategic partner and hub for a bike share program, which would then provide (as a partner) showers and changing facilities for riders.

The conversation revolved around implementation difficulties. Using existing bike infrastructure is difficult because there is no adequate system in place. Corte Madera-based businesses suggested that shopping center employees may be a good place to start such a program. This would provide employees an opportunity to go into Corte Madera /leave the mall for intraday errands without having to search for parking upon return.

10. **Would your company be willing to make space available for bike share docks or parking, etc.?**

Few companies felt that they had the space available for bike docks and parking. Some of the companies interviewed suggested that they could allow their employees to bring their bikes into the place of work for storage, but the ability to have a bike share station was low. It was suggested that a municipality would need to help provide designated areas for docks and parking as a partner of these programs.

11. Would your company be willing to promote the use of car-share, parking spaces in their parking lot (i.e. employees could have access to a shared vehicle program for mid-day work travel or personal errands) if hourly rental vehicles were located nearby? Would your company, if able to, be willing to pay for or make parking spaces available for a car-share vehicle?

In many cases, businesses that were part of the focus groups said that they would provide for a car-share vehicle if the space existed. Because many of the businesses that were part of these groups were in downtown or more urbanized settings, parking availability was already a concern. There was discussion in multiple groups about having such spaces available from the local municipality, where the city could provide the spaces as a partner in these efforts.

12. Would your company consider membership of a car-share program (may need two cars in case one car is out)?

In theory, participants agreed that membership would take place in such a program. However, there was skepticism. Many participants referenced Zipcar as a model for a car share program. There were concerns over liability assignment, trust of others driving the vehicles, and overall maintenance of the vehicles. The City of San Rafael stated that they had many cars available for use by city staff and workers as needed, but the liability issues made it impossible to make their cars available to the broader public.

13. Do you see any advantages or benefits in providing information on commute alternatives to employees?

We heard there would be benefits to providing the information. Many participants were skeptical of how the employees would use the information and benefits without overt incentives to do so. This is also a prevalent theme throughout the discussions: are incentives available, and are the efficiencies in alternative transportation enough to move employees to change?

14. How do you communicate with your employees generally? (i.e., mail, meetings, e-mail, intranet, etc.)

All participants suggested that e-mail was the key way in which employees and employers communicated with one another. In some cases it was texts; for specific employers, texting was a main way to communicate (this was in the trades and other construction industries).

15. As an employer, are you willing to distribute information about commute alternatives?

Focus group participants all said they were willing to distribute materials about alternative transportation programs to their employees. Some were ready to do so immediately. In some cases, information was distributed and connections were made with 511.org and TAM staff to larger employers; smaller employers were provided information at the focus groups about contacting 511.org and TAM for more information.

16. Do you feel there is value in partnering with nearby businesses to promote commute alternatives in your respective areas?

Most focus group participants suggested that there was major value in partnering, though much of the discussion was focused on the lack of a method to make that partnering work. Many were concerned about safety with respect to unknown fellow commuters, timing and efficiency issues, and general lack of control over the process.

Survey of Sausalito Businesses:

MEF provided questions to Sausalito businesses through the Sausalito Chamber of Commerce Leadership Institute. The participants were asked for written comments versus oral and group comments. Comments from Sausalito included:

- We need to implement both short term and long term strategies, starting with transportation initiatives that we can put in place soon, while we're planning and building more ambitious, expensive, and more effective solutions over time.

- In southern Marin, we should plan and implement water transportation solutions, with more ferries, water taxies, and small motor launches, with shoreline docks and support facilities to serve them.

- Support Marin Trolleys, starting with planning, funding and building the first demonstration line through the Ross Valley, connecting the towns of Fairfax, San Anselmo and San Rafael with a new rail-based streetcar system sharing Center Blvd., Red Hill Avenue and Fourth Street with cars.

- Initiate on-demand shuttle system in each neighborhood for short (two mile) trips and to serve as a feeder to public transit, linking homes to transit stops that are too far apart to walk. These shuttles or Jitneys would be owned and operated by neighborhood Home Owners Associations. They would promote safety as well.

- Thanks for asking for input and feedback.

- Thanks for seeking to improve our transportation systems.

- Be bold.

- Work on what we know will work.

- Remember the four F's for effective transportation:
  - Fun (This one gets overlooked too often. Buses aren't fun)
  - Fast (Buses aren't fast)
  - Frequent (Buses don't run frequently)
  - Free (or at least reasonably affordable)

- Streetcars are the answer – we need to go to rail because of its intrinsic fuel- and people-moving efficiency. Bikes and Jitneys will be the feeder. SMART will be the inter-regional spine. This is a proven, well connected system we know will work. People like rail. People like trolleys. It's worth the money. Let's invest in what we know will get people out of their cars. We won't get them out of their cars until we provide a viable alternative.

- Build a fully dedicated bicycle transportation system/infrastructure here in Marin like they have in the Netherlands. Run bikes through the Alto Tunnel to connect Southern and Central Marin. The few people who live along this existing public transportation corridor shouldn't trump the needs of the many. They choose to buy along a public right-of-way. It's ours, not theirs.

<u>Survey of Individual Business</u>

Once the focus groups had been completed, the next task was to finalize a survey instrument for individual businesses, specifically those with fewer than 50 employees, to provide more breadth to the study and connect to the employee surveys described above. The survey instrument was the product of the focus group discussions, and further refinements with TAM and 511.org staff.

Question 1: The first question was for the business to provide their zip code.

Table 2 shows the distribution of the twenty (20) surveys returned by Marin County businesses.[1]

[1] One of the recommendations from this report to increase the response rate is to survey through chambers of commerce at events, mixers, and other gatherings where there would be a large number of small businesses represented at the same time.

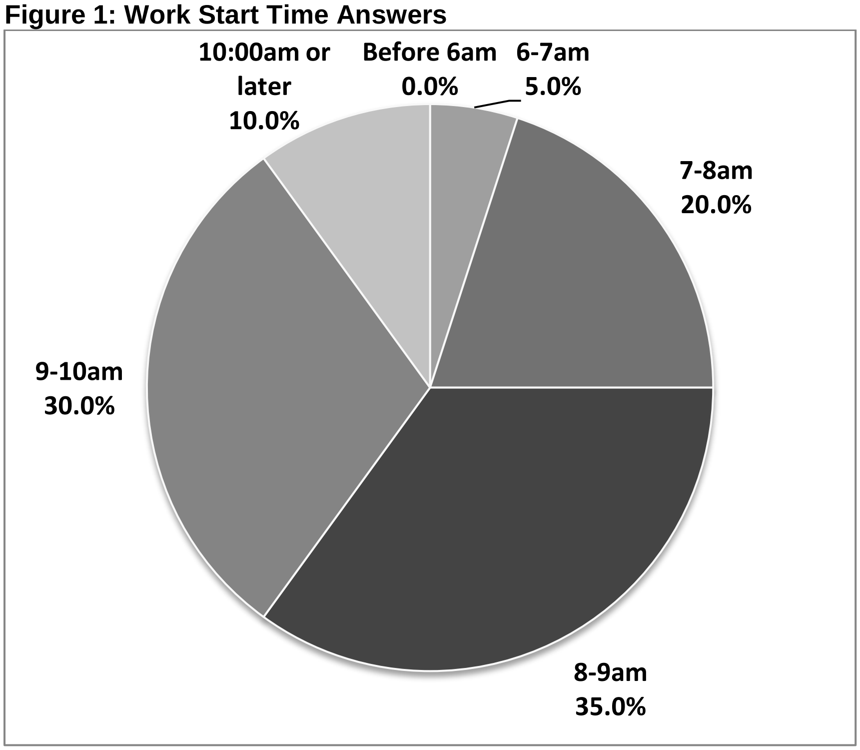
Table 2: Zip Codes of Survey Respondents, Distribution in Marin County

94901	San Rafael	94939	Larkspur	94957	Ross
94903	San Rafael	94945	Novato	94960	San Anselmo
94904	San Rafael	94947	Novato	94965	Sausalito
94925	Corte Madera	94949	Novato		
94930	Fairfax	94950	Olema		

Question 2: What time do your employees typically get to work during the week? (Check one)

This question was designed to tell us if there were any nuances to the start of workdays or any patterns that would inform us about commutes that were not already known. Figure 1 provides the proportions of these data; the answers began with "Before 6am" and then asked in hourly intervals to "After 10am" as a work start time. While most of the start times are after 7am, the small sample may not pick up financial market activity and construction/landscape/trades activity due to seasonal start times being different for different parts of the year.

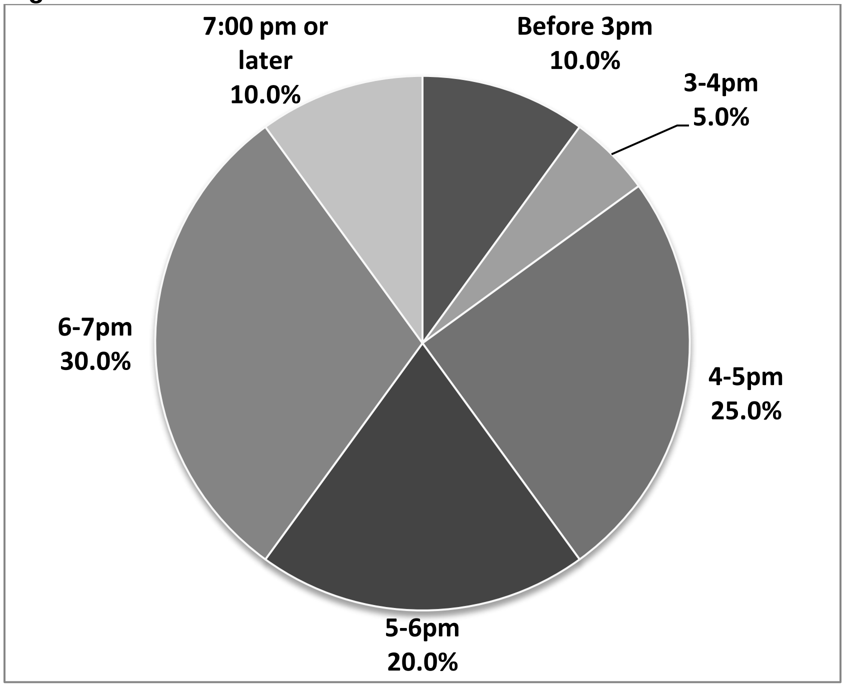
Figure 1: Work Start Time Answers



Question 3: What time do your employees leave for work during the survey week? (Check one)

As an analog to Question 2, we asked a question about the work end time as a way to pick up the return commute timing and nuances. Figure 2 shows these results.

Figure 2: Work End Time Answers



Question 4: If your company has a typical arrival and departure times for employees, please describe the situation.

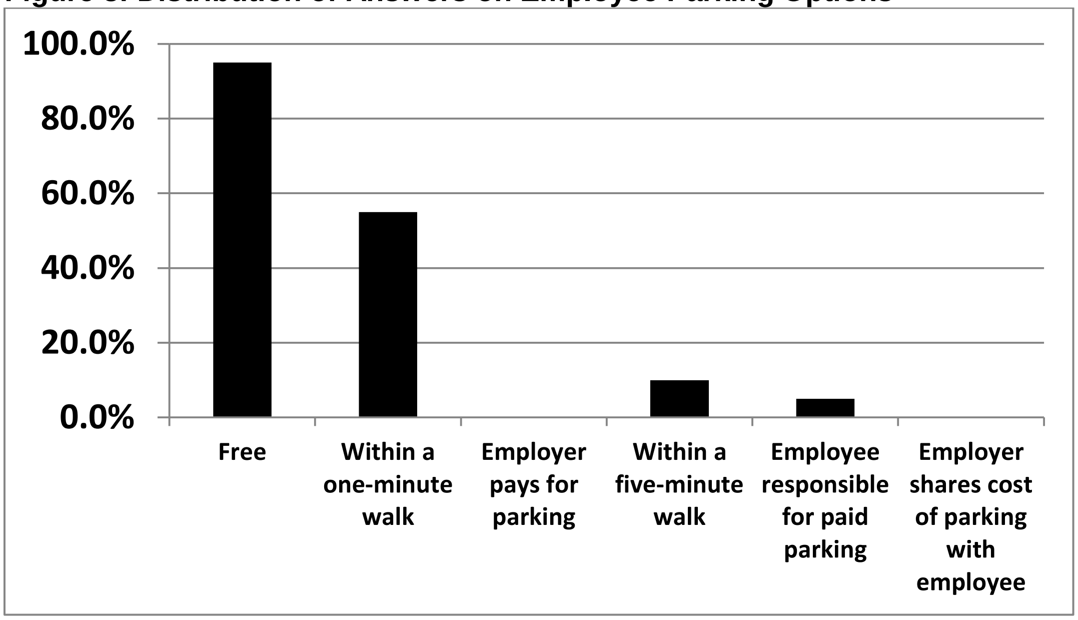
This question allowed for an explanation of any nuances, atypical or firm-specific commute behavior that the respondent wanted to provide. This question was an open-ended one; respondents could provide as much or as little information as they liked:

- Salaried staff usually work longer hours due to no overtime or time constraints.
- Staff works different shifts, as we are open from 10-9 most weekdays.
- We're a gym, so I have employees coming and going between 5am and 12 midnight. The times I checked for Questions 2 & 3 are approximations for a majority of my employees.
- Lodging facility, housekeeping, maintenance as needed
- Restaurant operations have multiple shifts
- Above for administrative staff. As a homecare organization, most of our employees are out in the field seeing patients, and visit the office as needed
- (The work is) very project based, lots of offsite meetings.
- Normal business hours
- We are a flexible environment people arrive between 7:45AM and 10:00AM, and leave between 5:00PM and 8:00PM.
- Shift work providing health care, 6-2 and 2-10
- We hire teachers from the local high schools/middle schools- they commute to the three other campus' to tutor after school - all Marin county Mill Valley, Larkspur and San Anselmo
- Self-employed, work from home

Question 5: Check any of the following that describe employee parking options at work (Check as many as applicable)

This question asked about parking from the employee standpoint; as with many of these questions, a fear we had was that the employers would respond from their perspective as the employer and not from the employee's perspective. This question provided the beginning of the employee's perspective. Figure 3 provides these results.

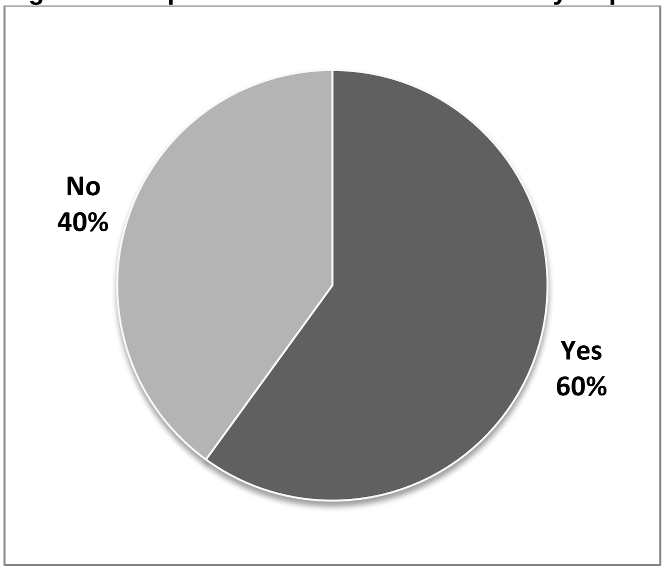
Figure 3: Distribution of Answers on Employee Parking Options



Question 6: Are your employees required to commute to different locations during the work day?

This question provides some insight about employers who asked about intraday trips from a business standpoint. One of the major issues that came from the focus groups was how to provide incentives for people to not drive themselves in single-occupant vehicle trips if they had either personal or business reasons to have intraday trips. This question looked at this issue from the work requirement standpoint. Figure 4 shows this binary answer and its proportions throughout our respondents.

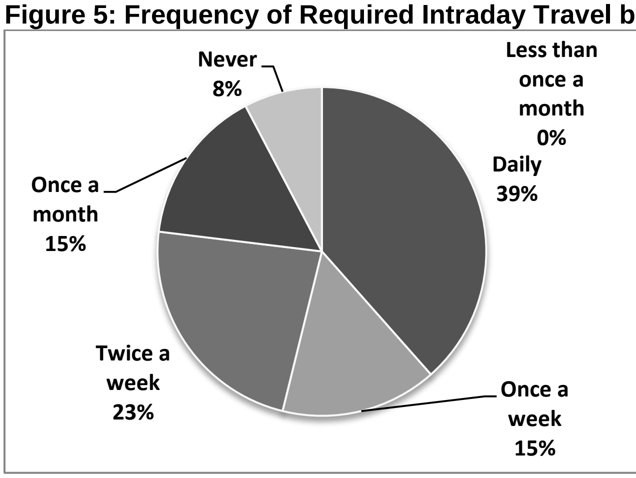
Figure 4: Requirement for Business Intraday Trips?



Question 7: If employees are required to commute to multiple locations, how often? (Check all that apply)

This question is about the frequency of commuting to required, different, intraday locations of those who answered "Yes" to Question 6. As a follow-up to Question 6, the frequency shows the potential demand for alternative programs, such as a car share or bike share program. Also, the frequency of intraday, required travel is likely to depend largely on the type of industry; construction and trades work is likely to have different locations and intraday travel for supplies and other needs; office workers may have very little to no intraday travel that is required by their employer. Figure 5 shows this distribution.

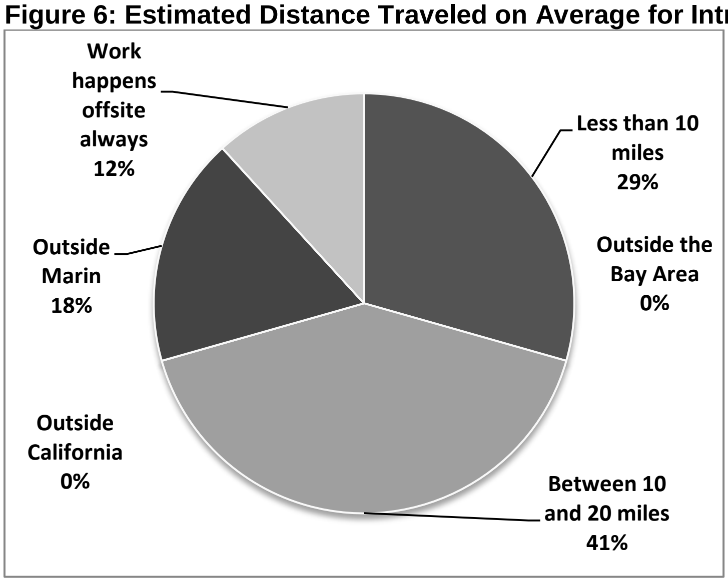
Figure 5: Frequency of Required Intraday Travel by Employers



Question 8: If employees are required to commute to multiple locations, how far do they go beyond their work commute? (Check as many as applicable)

As a second follow-up to Question 6 above, this question asked about the distance traveled for required, intraday travel. This distance issue also helps show the demand for alternative methods of intraday travel; for example, if most trips are more than 10 miles, it is unlikely that a bike share program would suffice these needs versus a car share program. Also, a "truck share" program may also be good to explore, as there may be needs for capacity and hauling for intraday travel as well as moving people. Figure 6 shows these distances.

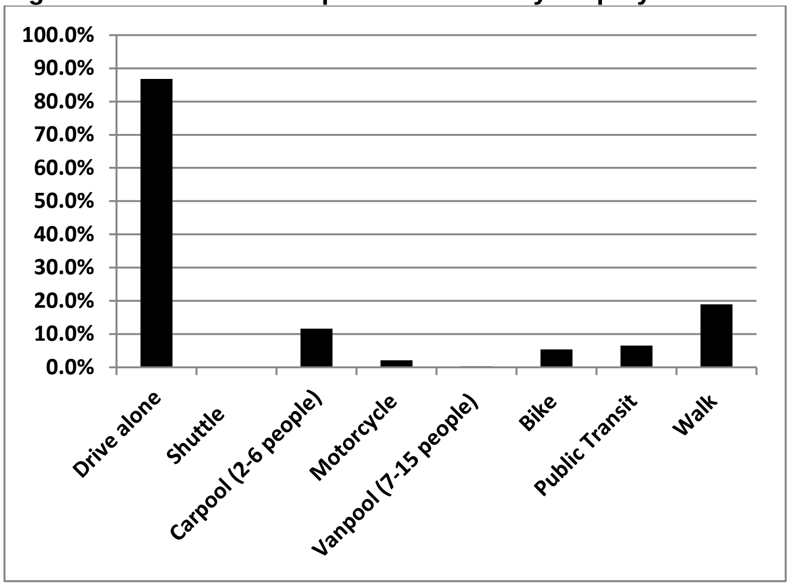
Figure 6: Estimated Distance Traveled on Average for Intraday Travel



Question 9: What modes of transportation are used by your employees? Please provide an approximate percentage for each of the modes below which represents the percentage of your employees that uses each mode. Please leave blank if 0% for a specific mode. (or check all that apply to speed up response time?)

Question 9 begins the survey's look at how employees get to work and attempts to confirm or dispel the idea that Marin County employees generally drive by themselves to work. The focus group results suggested that the vast majority of workers drove by themselves (single vehicle occupant trips), and Figure 7 shows this is likely the case across Marin County. These results corroborate the employee survey results, census results, and anecdotal evidence.

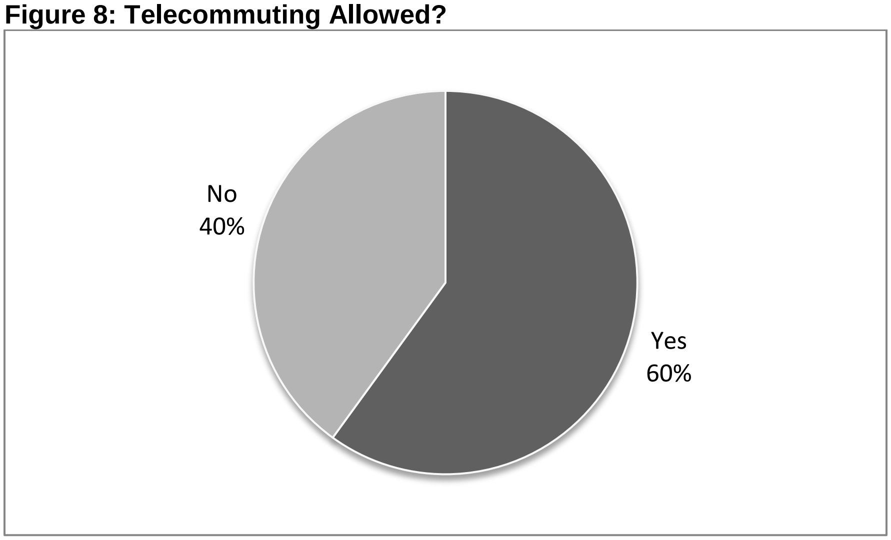
Figure 7: Modes of Transportation Used by Employees



Question 10: Does your company allow telecommuting (employees working from home)?

This question asked about telecommuting as an option for workers. Our focus groups suggested that employees who want the flexibility to work from home and "telecommute" was rising in number. Due to family issues and non-work related, intraday travel, telecommuting provides workers with more time to do work (avoided the loss of productivity while commuting to work in Marin County) and also provides the ability to pick up children from school, run errands, and accomplish more than would be done at work. Figure 8 shows the answers to this binary question.

Figure 8: Telecommuting Allowed?

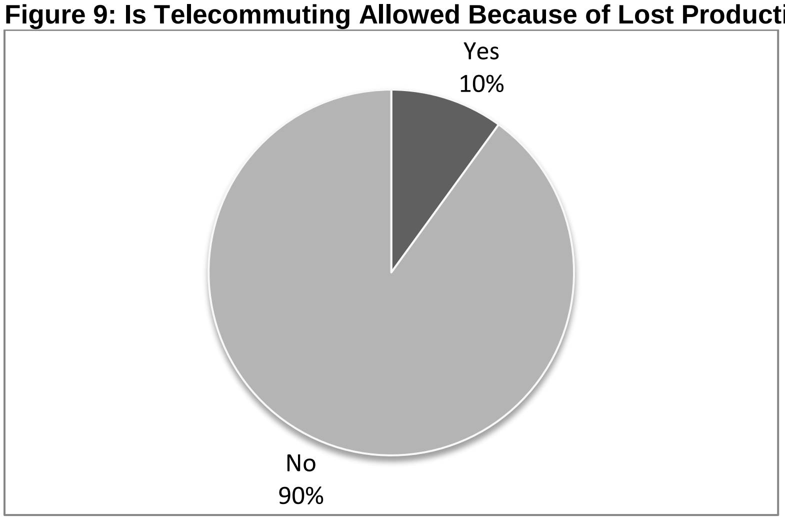


Question 11: If you answered "Yes" to Question 10: Does your company policy on telecommuting have to do with the commute time for employees?

As a follow-up to Question 10, one concern of this study was that sitting in traffic reduced productivity for employers. As a result, there would be more demand for ways to reduce commute times or make workers productive during commute through alternative commute options.

A hypothesis from this opinion was that some employers would use a telecommuting option to avoid this lost productivity. This idea could be explicit in strategic planning and in direct communications with employees about the telecommuting option. Figure 9 shows these results. Note that lost productivity was not a primary reason for employer telecommuting programs.

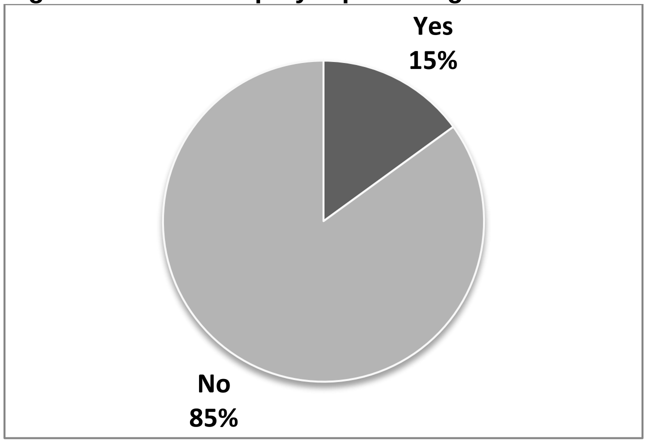
Figure 9: Is Telecommuting Allowed Because of Lost Productivity?



Question 12: If your employees use a carpool or vanpool, does your company provide financial incentives for such a choice?

This question asked how businesses in Marin use financial incentives to entice workers to use either carpool or vanpool options. These incentives could be in direct payments to those that use their own car or van, indirect payments to subsidize the worker paying for entry into a car or vanpool, or some other form. There could also be matching programs with government, or the use of the IRS Commuter Care Benefit or TAM’s vanpool program. SB1339 is recent legislation that mandates all employers with over 50 workers provide information on incentives for alternative commute options. Because this survey targeted small and medium-sized businesses, some of these businesses may not know about, or have yet provided information to employees. This was a theme that came up in our focus groups as well. Figure 10 shows the responses.

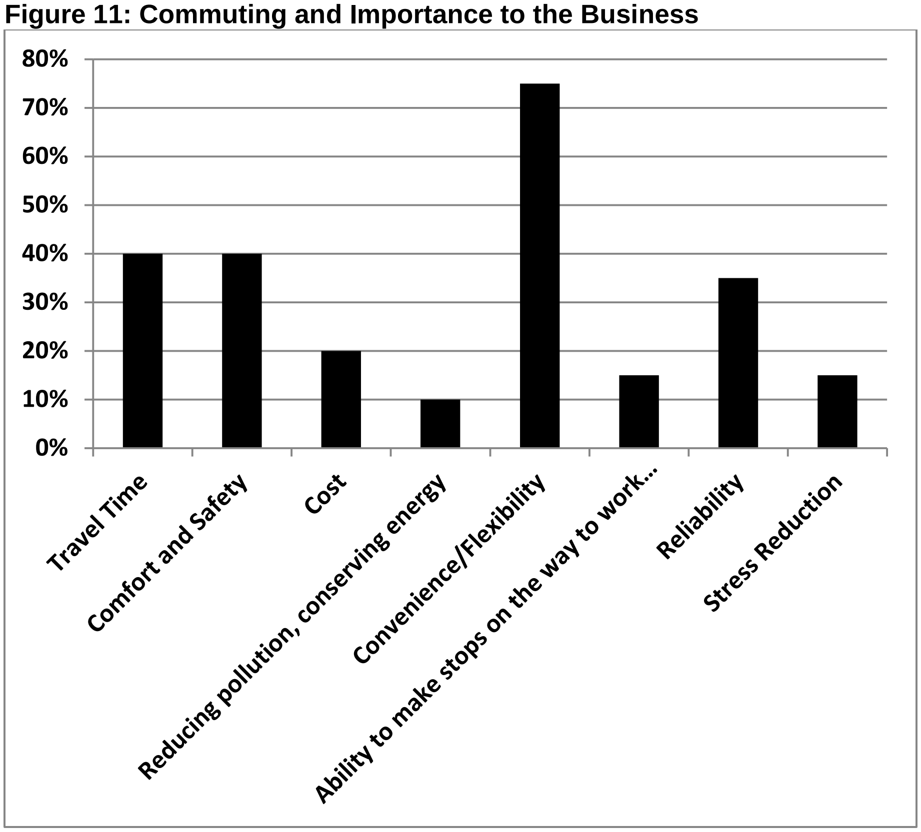
Figure 10: Is the employer providing incentives to carpool or vanpool?



Question 13: What is the most important aspect of your employees' commute to your company? (Select up to 3)

This question is a follow-up to Question 11. If the employers are concerned about commute times, lost productivity from workers commuting, and other issues in how employees get to work, the hope is that there are certain aspects of this issue that have come up in strategic planning and other discussions where employers have identified specific, pertinent commute issues. Figure 11 shows some possibilities.

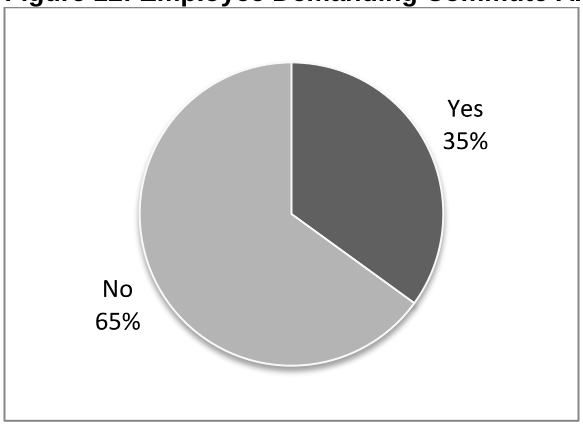
Figure 11: Commuting and Importance to the Business



Question 14: Have your employees indicated an interest in specific commute alternative options?

This question is asking about incentives and commute options from the employee side to see how employers are perceiving (or actually hearing) that employees want to receive direct or indirect benefits to use commute option alternatives. Figure 12 shows these results.

Figure 12: Employee Demanding Commute Alternatives and Incentives?



Question 15: If you answered "Yes" to Question 14, please pick three of the following:

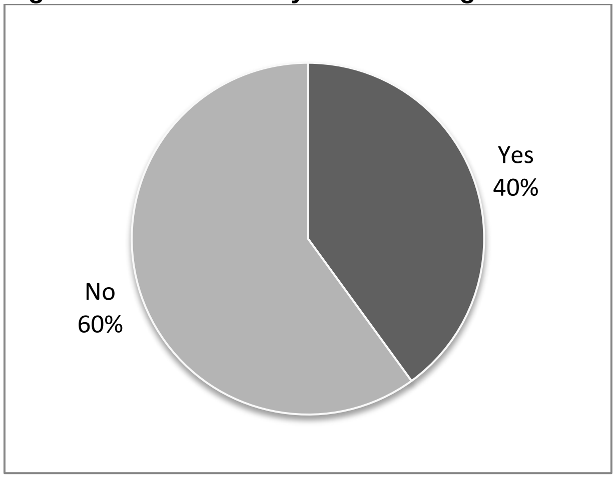
This question follows up Question 14 to look at the most often asked about as a way to look at alternative commute options. In general, employees were walking to work or taking public transit as an alternative to single- occupant vehicle trips. Because there were so few firms that said “Yes” to Question 14, the answers to Question 15 should be considered as very specific to these companies and not indications of an overall trend. The choices are shown below.

Carpool	Walk
Bike	Transit
Vanpool	Work at home for a regular workday

Question 16: Does your company know about a federal program that allows your employees to use pre-tax dollars to pay for transit, vanpool and bike commute expenses? (IRS Commuter Choice Tax Benefit, for example)

This question is about knowledge of the IRS Commuter Choice Program and shows those that have and have not heard of this or any federal programs. Figure 13 shows these results.

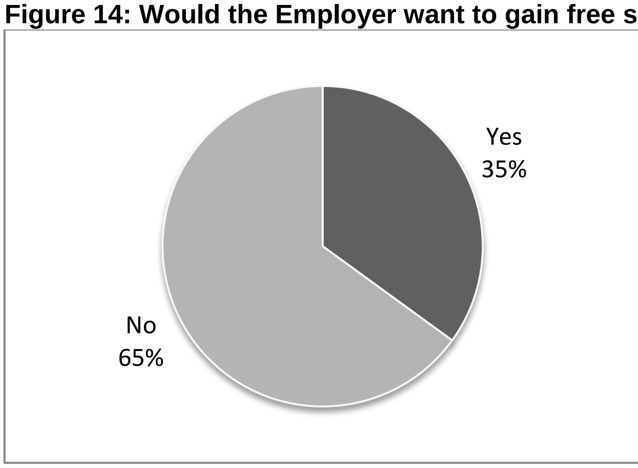
Figure 13: Aware of any Federal Programs for Alternative Transportation?



Question 17: The IRS Commuter Care Tax Benefit provides a pre-tax opportunity to reduce eligible employee commute expenses by up to 40%. Would your company want free support to set up such a (pre-tax commute) program?

This question is a combination of follow-up to Question 16, and also to see about the attitude of the employer toward providing employees with information and access to the IRS-allowed use of pre-tax dollars for some commute expenses even when not required to do so by SB 1339 and the anticipated regional mandate. This question showed some disconnect between employers, employee commutes, alternative transportation options and incentives. Figure 14 shows these results.

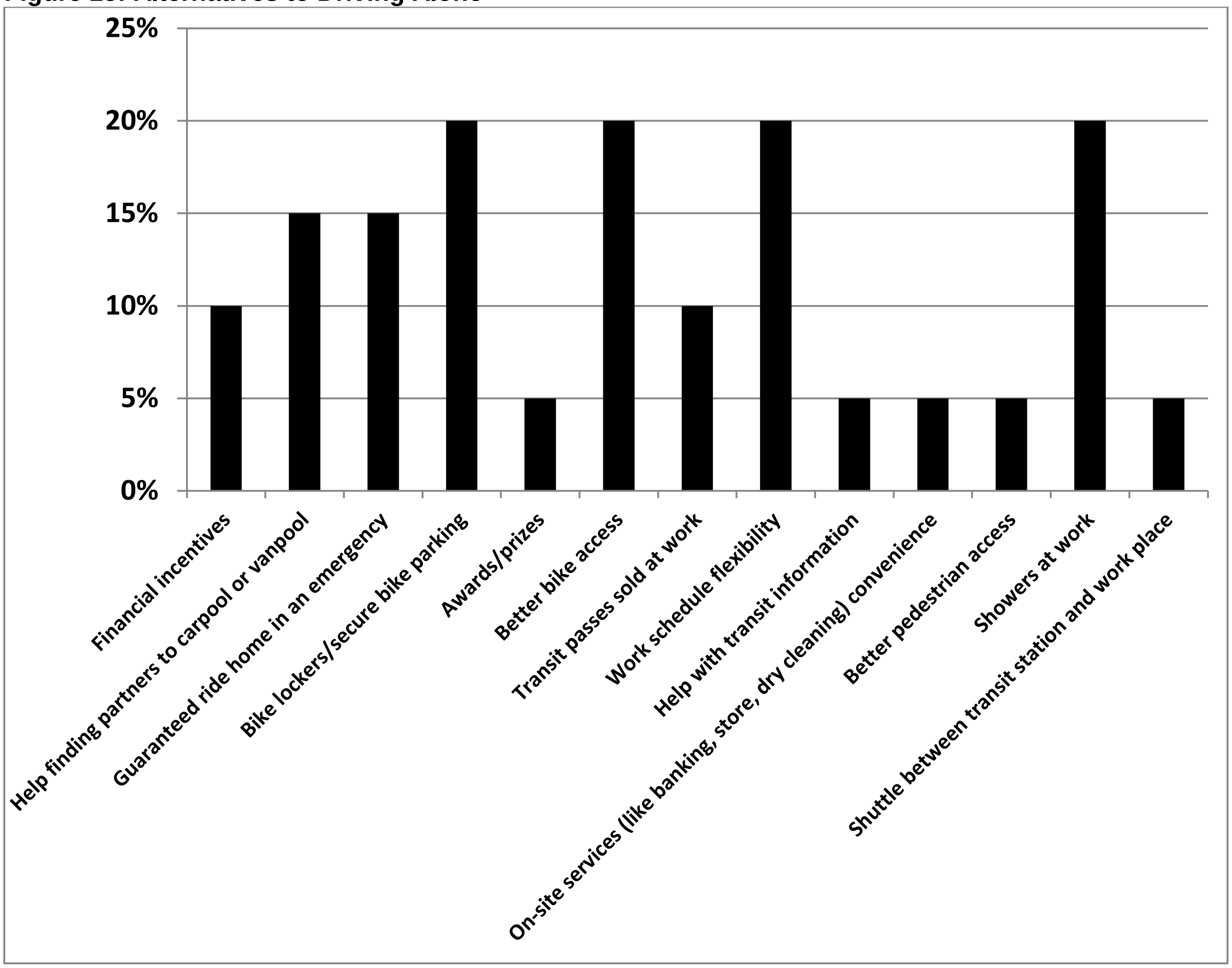
Figure 14: Would the Employer want to gain free support to set up such a program?



Question 18: For those employees that drive alone to work, does your company encourage them to use different ways to get to work (like carpooling, transit, biking or walking)? If so, which of the following are used to promote the use of commute alternatives? (check all that apply)

This question is a follow-up to Question 9, assuming there were going to be some percentage greater than zero that drive alone. Figure 15 shows these results, and shows a fairly-even spread across the possibilities. These answers begin to help TAM and 511.org consider what employees may consider as alternatives.

Figure 15: Alternatives to Driving Alone

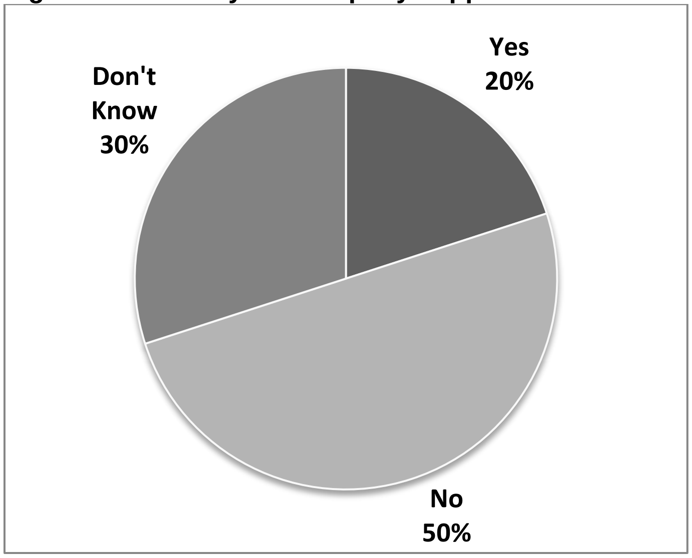


Note: The sum of these percentages will exceed 100% because the respondents were allowed multiple answers

Question 19: Would your company be interested in a bike or car share program at or near your worksite?

This question asked for a simple yes or no to the respondent's attitude toward a bike or car share program near the workplace. Figure 16 shows the responses.

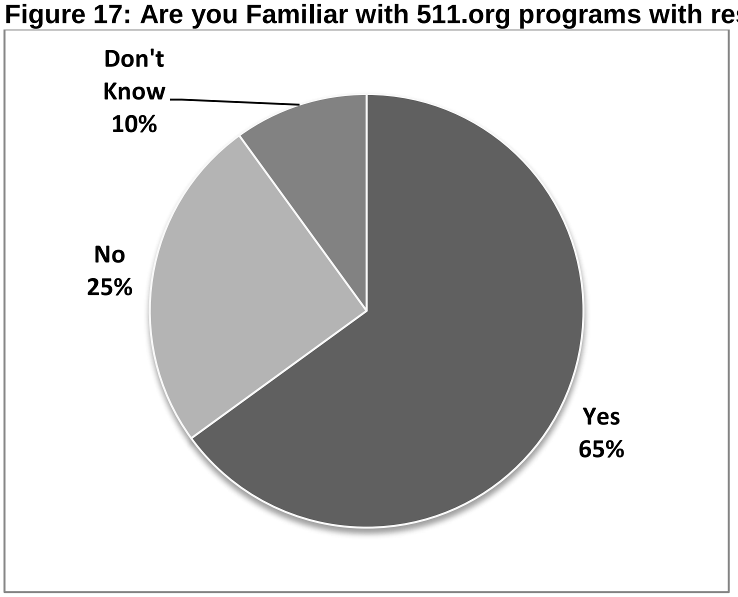
Figure 16: Would your company support a bike or car share program close to work?



Question 20: Are you familiar with free 511.org services to promote and support commute alternatives to driving alone?

This question asked a simple yes or no about the firm's knowledge of 511.org's services with respect to commute options. This is positive information as that the majority said they were familiar. See Figure 17 for these results.

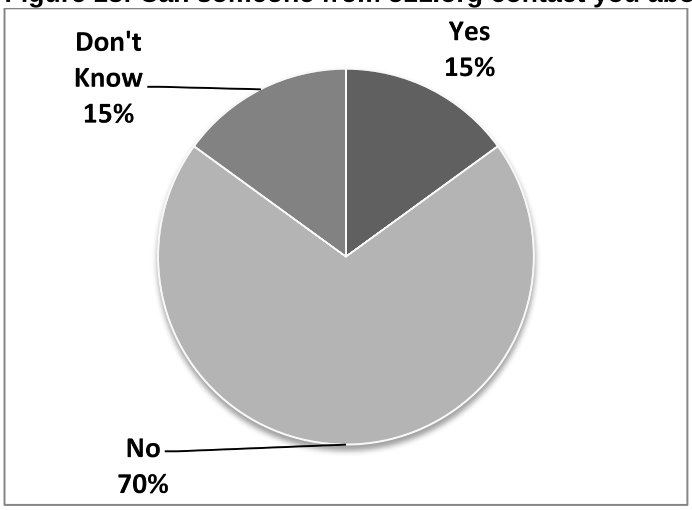
Figure 17: Are you Familiar with 511.org programs with respect to commute options?



Question 21: Would you like a 511.org Employer Services Representative to contact you with additional information?

See Figure 18 for the results. Only 15 percent said yes. This question was one of the few that had results that were in contrast to the focus group results. In most cases, the focus groups were happy to receive more information about 511.org services and ways to help provide more and better commute options. There is contrast here between the employee surveys and employer focus group results.

Figure 18: Can someone from 511.org contact you about more info and these programs?



Conclusions and Recommendations

Because this report combines surveys, focus groups and interviews with employees and employers in Marin County, many of the conclusions come from where these groups both connected on attitudes, behaviors and knowledge about alternative commute options, intraday transportation options, and incentives to change behavior. Some general themes that emerge from the information gathered indicate that single-occupancy vehicle trips are a cultural issue, and the economic and social issues involved in making the choice to use alternatives run against the cultural barrier. The barrier is partly because driving alone can provide more time flexibility, more convenience and more freedom in decision-making around getting to and from work, compared with other commute alternatives. While the question of intraday options is different than alternative commute options, they are connected in terms of the time flexibility and convenience issues.

On the employee side, commute distances are approximately 17 miles one-way on average. This commute distance suggests that Marin County has many employees who are good candidates for public transit and carpool/vanpool commute options. However, employees who drove less than five miles on average still drove themselves 74 percent of the time, while many others at this short distance walked or biked (21 percent). Work arrival and departure times are well distributed in Marin County, where 8am to 10am is the major arrival time and 5 pm to 6 pm is the major departure time. If employees were to use a commute option, it seems that carpooling and public transit are major options, although telecommute is preferred most of all. This follows focus group data from employer focus groups and survey results. Finally, employee surveys and employer focus groups and surveys results suggest a need for more education about how bike and car share programs support workers and businesses to market these programs.

On the employer side, many of the same themes were repeated as found in the employee survey, but the focus groups had some different responses. The employer surveys found 50% of respondents were interested in bike and car share programs. However, the focus group participants were generally excited about those possibilities, albeit with some uncertainty about how the bike and car share programs would work. In terms of the alternative commute options, emergency ride home program and other potential programs and incentives, the focus groups were much more excited and expressed more interest than what the individual employer surveys suggested. However, all groups showed a lack of knowledge about programs; which suggests that more direct marketing efforts, case studies as advertising, and investment in pilot programs with parallel marketing may be a good ways to gain more use of alternative options.

Some large employers and municipalities currently have programs in place across the spectrum of alternative commute and intraday options like car sharing just for employees within the organization; however many are barred from participating as strategic partners (Kaiser Permanente may be an exception to this) and expanding a share car program to include other employers. Telecommuting was an option that was something many employers use as a way of flex scheduling with employees; this results in employees choosing not to commute at all if possible. Intraday travel requirements also were broad and showed that there are many businesses in Marin that have employees moving around Marin County for work daily.

In general, employers corroborated the employee responses in terms of how workers get to and from work: convenience; cost; reliability; and time. All those factors point to the reasons why many commuters either prefer no commute (telecommute) or driving alone. In terms of bike and car share programs, there is some uncertainty regarding demand, with more education needed. Survey responses demonstrated a need for intraday options.

Recommendations

1. Contact small and medium-sized businesses through chambers of commerce, where chambers become the champions of these programs.
    a. Hold educational, sign-up, "pizza party" sessions with chamber CEOs to provide them with information for their members;
    b. Advertise cultural change around transportation use for both commuters and intraday trips using local business examples;
    c. Follow up with and find stories of how small and medium-sized businesses are more productive, reduce costs or both as a result of using alternative commute program(s); and
    d. Advertise these stories as tangible reasons to use alternative commute programs.
2. Investigate and promote rising productivity while using public transit and carpool/vanpool
    a. Look to maximize public transportation and carpool/vanpool use;
    b. Find a wifi partner (ATT, Verizon, Comcast) that wants to advertise a "green" initiative to enable people to work on\buses and ferries; and
    c. Advertise the productivity and "fun" aspects of making that move to commuting using a public transportation option; and
    d. Work with employers in how to promote and use telecommute programs.
3. Pilot a car share program in Marin.
    a. Allow pilot program to take place with private provider.