



TMASF Connects

2013 COMMUTER BEHAVIOR SURVEY HIGHLIGHTS

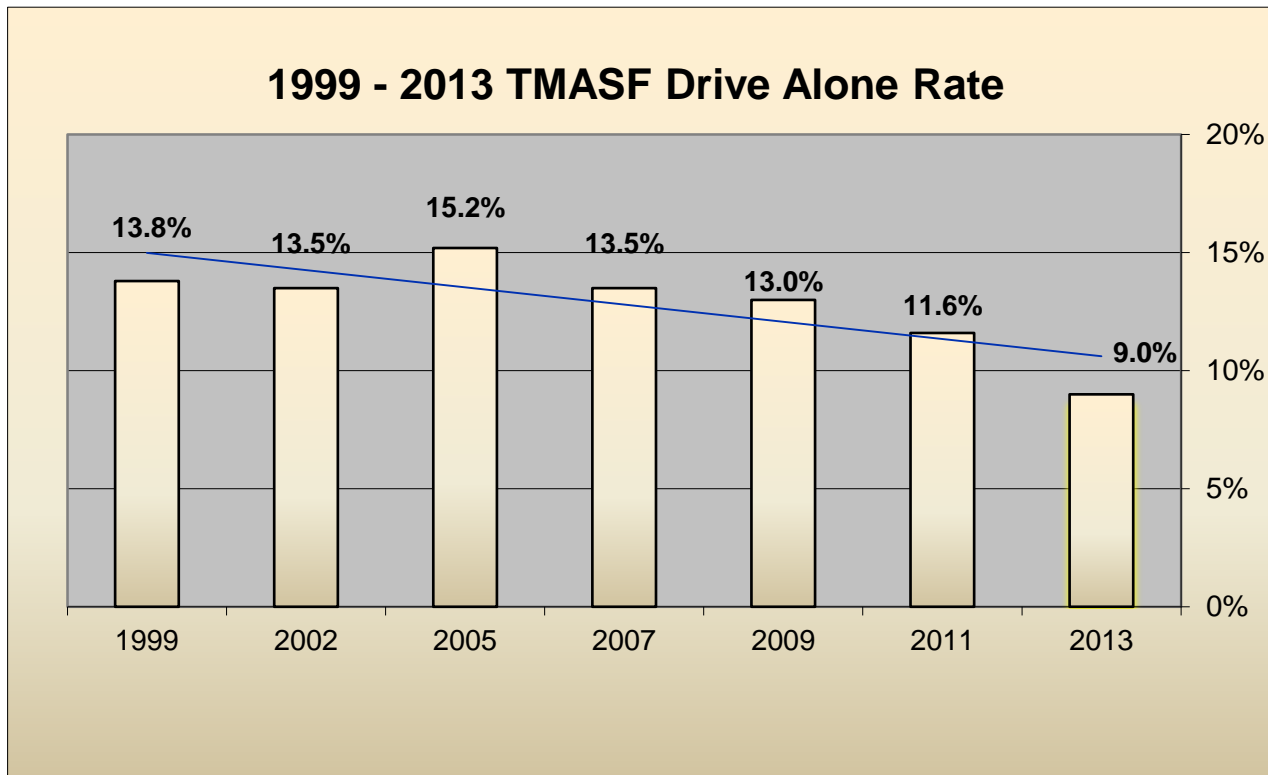
May 8, 2013

TMASF Connects 2013 Survey Process

- Surveyed 60 member buildings with 59,369 occupants
- 597 surveys collected – 1% sample size
- Survey period February 7 – 25
- Conducted per CCSF Planning Dept. requirements
- Conducted per LEED EB:O&M requirements
- Survey analysis and report prepared by DNV KEMA

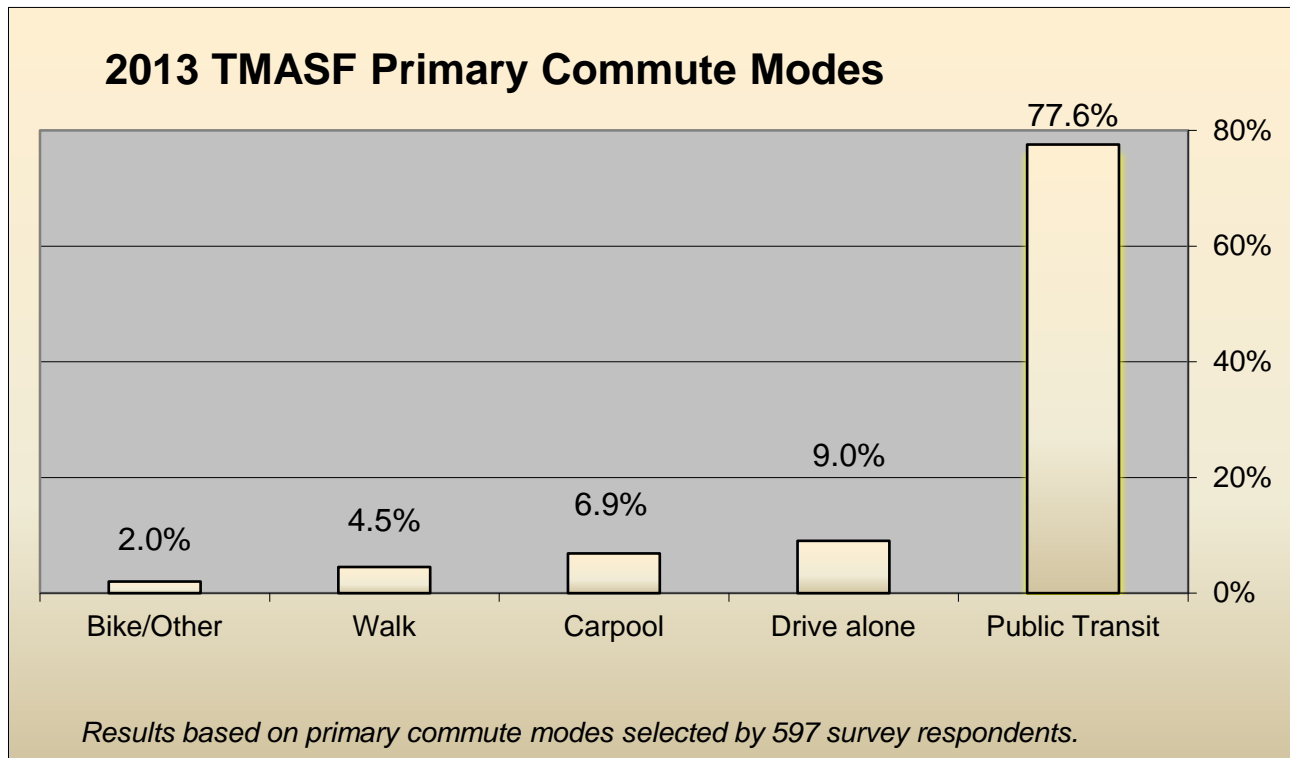
2013 Drive-Along Rate and historical trends

- 2013 Drive-Along Rate is 9.0%
- Historical low drive-alone rate for TMA SF buildings



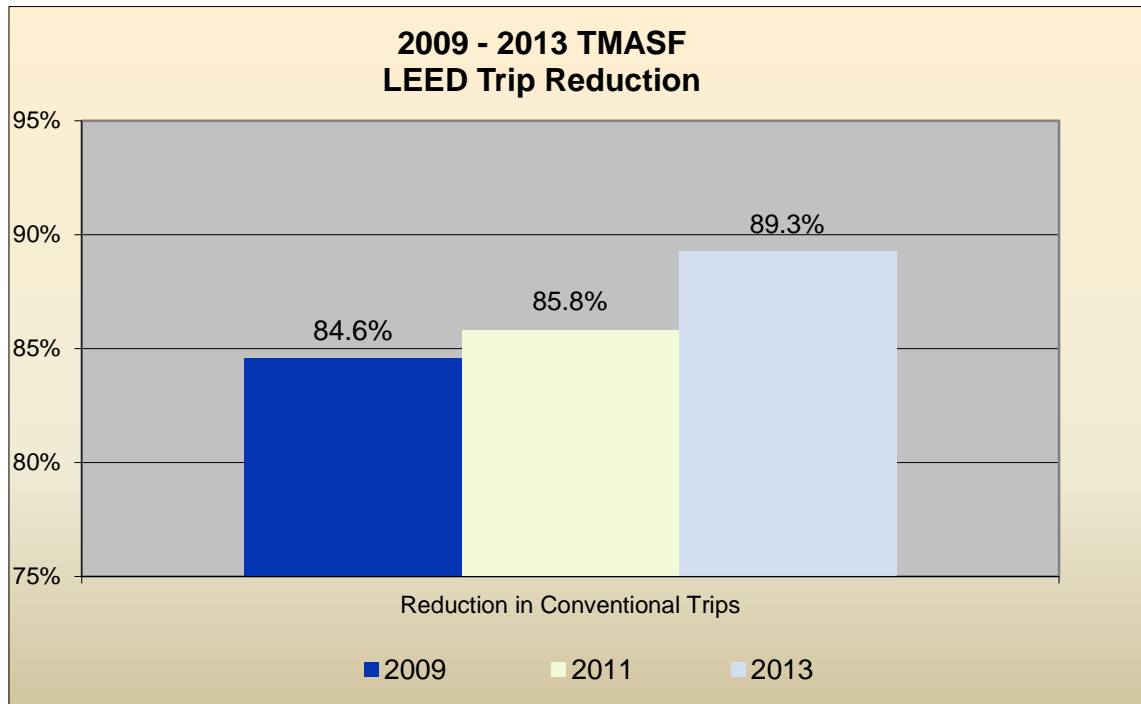
2013 TMASF Survey – Primary Commute Modes

- 78% selected Public Transit as Primary Commute Mode
- 4.5% increase in public transit use over 2011 TMASF Survey



LEED EB:O&M Alternative Transportation Credit

- 89% reduction in conventional commuting trips per LEED methodology.
- TMA SF Member Buildings achieve 16 points towards LEED EB:O&M certification (SSc4)



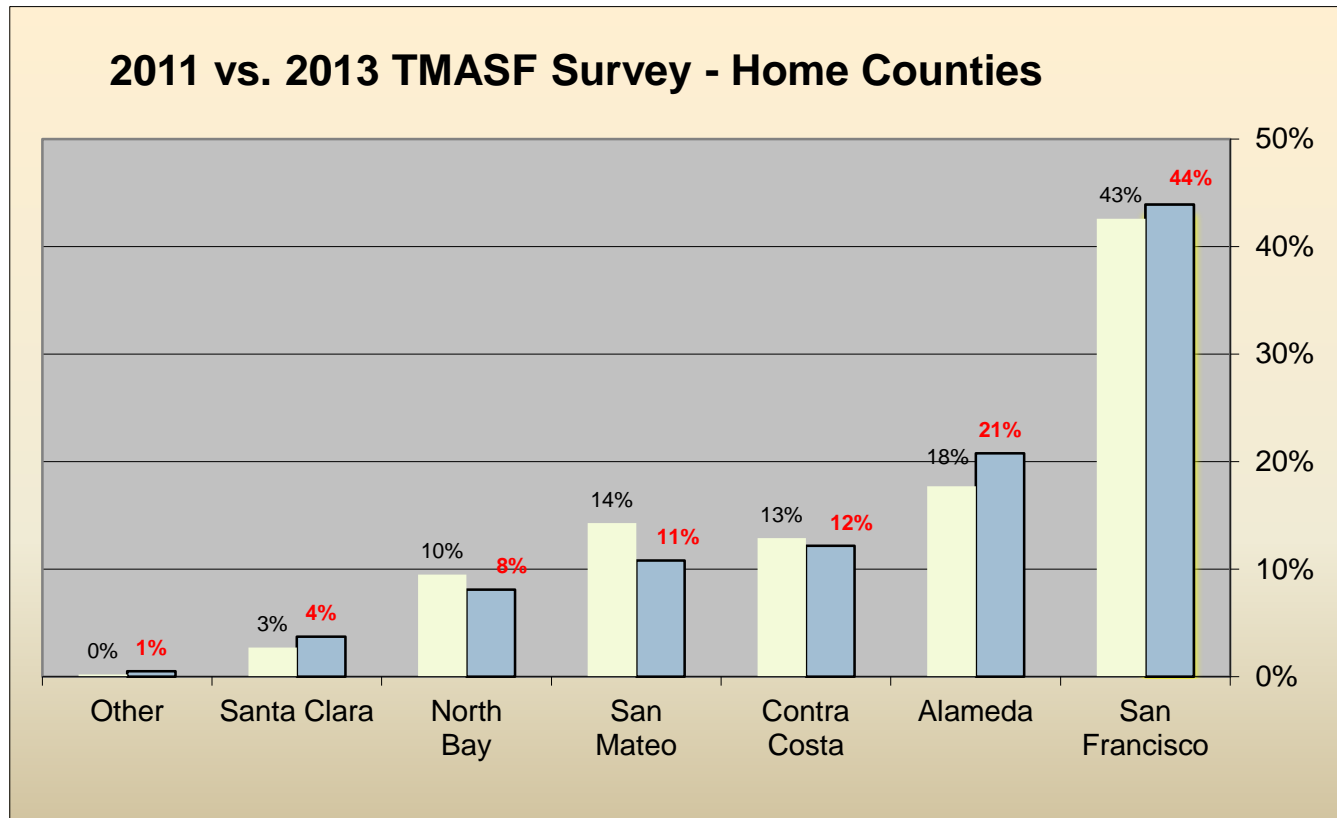
Factors driving increased alternative transportation use

Increases likely due to number of related factors, such as:

- Buildings concentrated in core SF business districts
- Demographic factors – home city, age group, job type
- Environmental awareness and lifestyle factors
- Improving economic conditions and increased traffic
- Promotion of transit options and commuter services
- Infrastructure and residential development along BART lines
- High cost of parking, gas, bridge tolls

2013 TMASF Survey - Home Counties

- 4.4% increase in respondents from San Francisco and Alameda Counties
- 6% decrease in respondents San Mateo and North Bay Counties

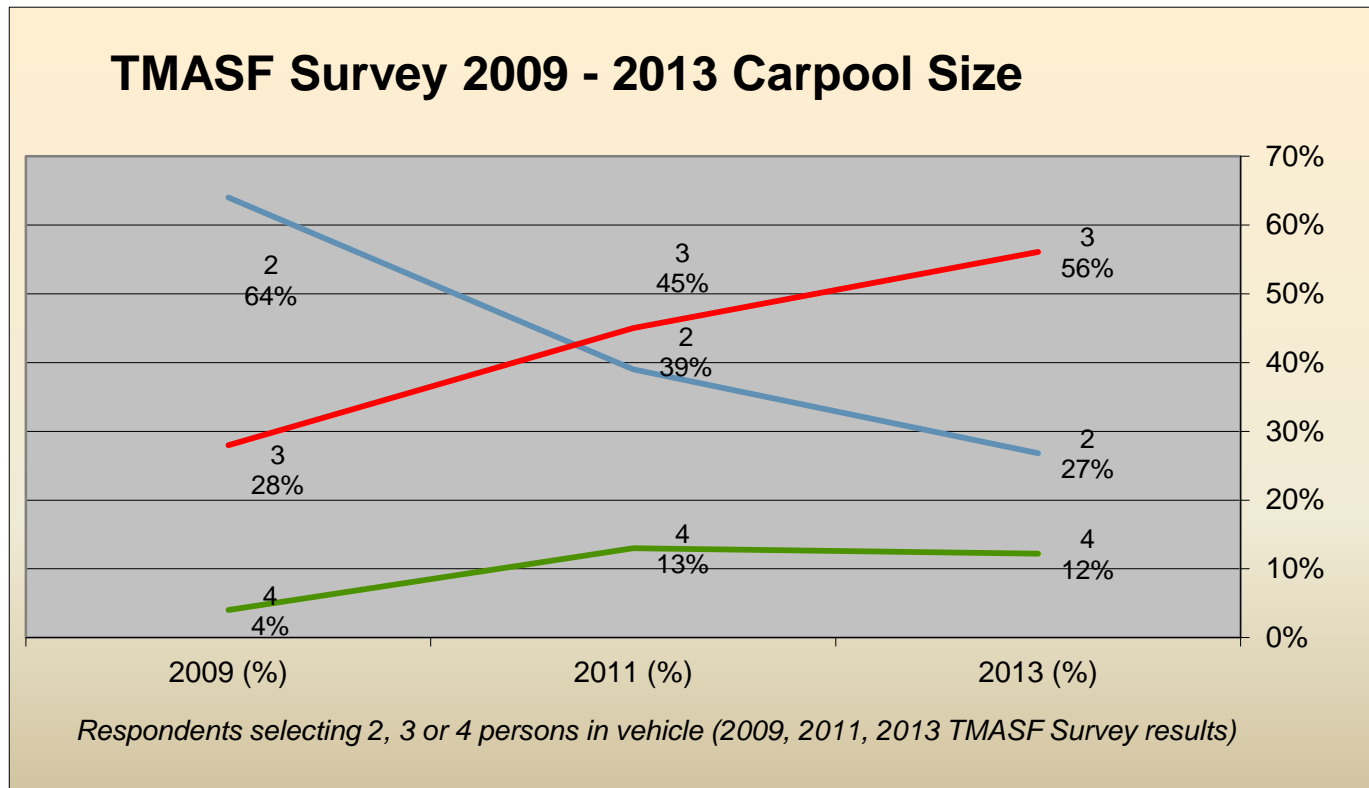


Other Survey Highlights and Trends

- 3-person carpool doubled between 2009 and 2013
- Extension of morning and evening peak commute periods
- Commute resources and respondent comments:
 - 14% increase in smartphone use from 2011
 - Call for increased transit capacity during rush hour
 - 32% are aware of TMASF Breaking News Alerts –
29% say they've used this service
 - 70% of respondents who are aware of TMASF services said this information influenced their commute

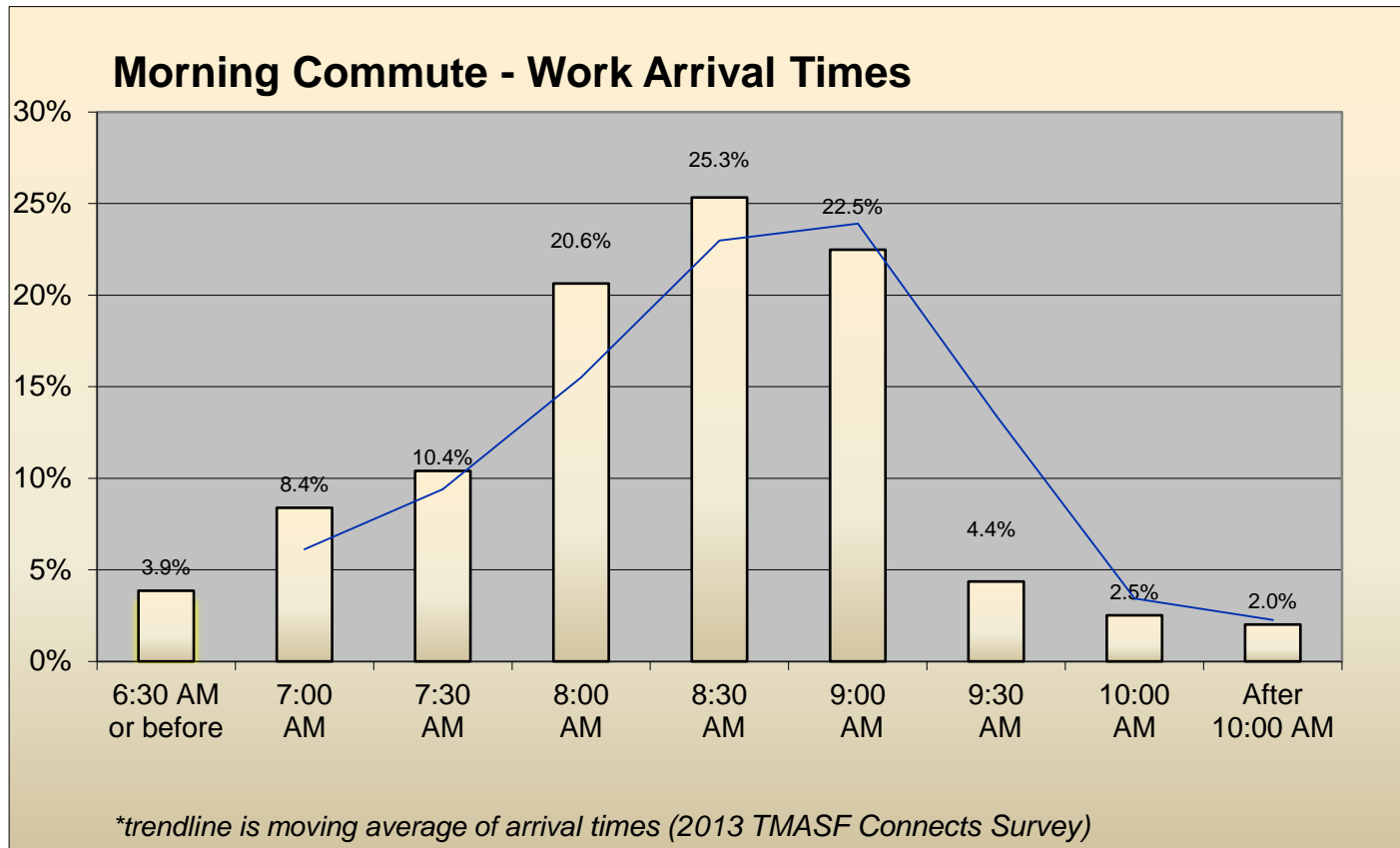
2013 TMASF Survey - Carpool Size

- Respondents in 3-person carpool doubled between 2009 and 2013 (from 28% to 56% of carpool riders)



2013 TMASF Survey - Peak Commute Periods

- 87% of respondents arrive between 7 and 9 AM
- 6% increase in arrivals between 8 and 9 AM



2013 TMASF Survey - Peak Commute Periods

- 76% of respondents depart between 4 and 6 PM
- 19% of respondents leave after 6 PM, an increase of 8% from 2011

