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-Alone Rate and historical trends

- 2013 Drive-Alone Rate is 9.0%
- Historical low drive-alone rate for TMASF buildings

![Graph showing TMASF Drive Alone Rate from 1999 to 2013]
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

Results based on primary commute modes selected by 597 survey respondents.
LEED EB:O&M Alternative Transportation Credit

- 89% reduction in conventional commuting trips per LEED methodology.
- TMASF 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

![Bar chart showing the percentage distribution of respondents from different counties in 2011 vs. 2013. The chart shows a significant increase in respondents from San Francisco and Alameda Counties, while there is a decrease in respondents from 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:
  o 14% increase in smartphone use from 2011
  o Call for increased transit capacity during rush hour
  o 32% are aware of TMASF Breaking News Alerts – 29% say they’ve used this service
  o 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

*Graph showing departure times with trendline indicating moving average of departure times (2013 TMASF Connects Survey)*