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Commuter Behavior Survey

In accordance with the terms of
City & County of San Francisco
Planning Commission Case #2010.0081U
Resolution 17210

Table of Contents

Introduction	3
Methodology.....	5
2020 Commute Modes and Drive-Along Rate	8
<i>2020 Drive-Along Rate and Historical Trends</i>	10
<i>2020 Public Transportation Use and Historical Trends</i>	11
Home Counties.....	13
Commute Characteristics.....	13
<i>Ridesharing Characteristics</i>	14
<i>Arrival and Departure Times</i>	15
<i>Carpool Parking</i>	16
Traffic/Transit Information Resources.....	17
Building/Employer/TMASF Connects Services.....	17
Car Sharing and On-Demand Ride Hailing Services.....	21
Commuter Challenges and Needs.....	21
Demographics: Job Type and Age Group	23
Summary.....	25
Recommendations.....	26
Appendices	
<hr/>	
Appendix A –TMASF Connects Member Buildings.....	27
Appendix B – Home City of Survey Respondents.....	29
Appendix C –TMASF Connects 2020 Survey Instrument.....	32

Introduction

The Transportation Management Association of San Francisco (TMASF) is a not-for-profit organization that is incorporated as a 501 (c) (4) mutual benefit entity. The association was incorporated in 1989 and began operation of the program in April 1990. The TMASF Connects was established to help building managers and owners comply with mandated transportation demand management requirements per the terms of their development permits. Current membership consists of 80 buildings in San Francisco's Financial and South of Market districts. A coded list of member buildings is provided in Appendix A.

TMASF Connects members largely share a requirement as a condition of their building permit to mitigate the impacts of development upon the transportation system. The City and County of San Francisco (CCSF) has an official *Transit First Policy* that has been in effect since the late 1980s. The TMASF Connects is authorized through City Planning Resolution to offer a compliance program in accordance with accepted transportation demand management principles. The program is monitored, and this survey is an important tool used by the City to evaluate the TMASF Connects members' fulfillment of their transportation demand management responsibilities.

The TMASF Connects Commuter Behavior Survey is typically conducted every two years during the first quarter, usually February. The survey that was scheduled to be conducted in February 2019 was postponed by mutual agreement between TMASF Connects and CCSF Planning staff due to closure of the Salesforce Transit Center which caused a major disruption for many commuters. Since the purpose of this survey is to assess the normally used commute modes, it was decided to wait until the normal transportation services were restored.

TMASF Connects 2020 Behavior Survey - Purpose

We followed the protocol, used the questions and provided the answers in this report in accordance with City and County of San Francisco (CCSF) Planning guidelines established for this program. The main purpose of this survey is *to determine how people arrive in San Francisco on a typical commute day*. In addition to home origin, time of travel, occupation and age questions, other key commuter trip options were measured.

We queried respondents about the longest portion of their commute trip and the last segment that actually brings them into their work location. For example, a commuter who drives 10 miles to BART and travels 25 miles on BART and then walks two blocks would be considered a BART rider. The longest portion of the trip was added in 2014 to begin to identify the number of miles traveled each day by private vehicles – regardless of whether they went to San Francisco or a public transit hub in the Bay Area.

The key question though is to assess the number of drivers who choose to drive alone to work routinely. Respondents who stated their car is required to conduct their job duties are counted in the overall drive-alone rate. Additionally, we segment the *drive-alone by choice* which

discounts the respondents who need their car to conduct their job.

When viewed between 2005 and 2020, there are minor differences in the modal shares of drive-alone respondents. The drive-alone by choice numbers vary a bit more as the numbers of people needing their cars to conduct their jobs varies.

TMASF Connects 2020 Commuter Behavior Survey – How it was conducted

We conducted the 2020 survey for a four-week period beginning at the end of January. This timing also had a number of events occur that we believe has possibly skewed the commuter response about travel patterns. The closure of Market Street was viewed by many commuters and members as a disruption. The increasing resistance of building tenants to allow employees to participate in electronic surveys or have access to any type of electronic communication that is not intra-organizational is also a factor. And, finally, the COVID-19 concerns must be factored in as well. By the end of the survey period, many commuters were working from home and/or not commuting via their 'usual' mode(s). *However, we did gather the 1% random sample from each and every member building consistent with the agreed-upon requirements of the City and County of San Francisco's Planning Department.*

The 2020 survey results indicate a minor increase in the total drive-alone rate over 2017 findings. This increase falls within a standard 3% margin of error. Given the major increases in the building population, closure of Market Street and the disruptive force of COVID-19, it is reasonable to question whether a true increase in driving alone exists. In the Recommendations Section, we have included a number of suggestions for future surveys.

The purpose of this transportation survey is to learn about the commuting behavior of employees who work in TMASF Connects buildings and to guide program components to most effectively encourage commuters who drive alone to work to change their commute mode. As stated earlier, the main purpose of this survey is to assess how commuters arrive to their building on a typical commute day. We believe we have addressed this question through the findings in this report.

This report, along with the survey process and analysis phase, was conducted using Survey Gizmo. An independent consultant with three decades of transportation experience gathered the 1% responses from each of our member buildings and tabulated the data. The former consultant from GNVL who tabulated and analyzed past surveys also served as a reference for a number of points. Finally, Wendy Silvani of Silvani Transportation Consulting provided a review of the survey results. This survey report fulfills the City and County of San Francisco's requirement for monitoring program effectiveness.

Methodology

Consistent with prior TMASF Connects surveys, the City and County of San Francisco (CCSF) mandates that transportation surveys be completed by 1% of the TMASF Connects member building population. Random was defined as the first 1% of responses received by date. The CCSF requires that the established random sample methodology and protocols be utilized to assure they receive consistent data by TMASF Connects building occupants year over year.

TMASF Connects promotional programs were stopped six weeks prior to the start of the survey period. During the survey period, membership communication was strictly limited to providing information about *major traffic or transit disruptions*. These practices are observed to ensure that the survey reflects actual travel patterns used by commuters. TMASF Connects takes care to ensure that findings do not reflect temporary or incentivized transit or rideshare trips reported during the survey period.

The TMASF Connects staff collected building occupant counts from each member building during September 2019 and January 2020. The 2020 Commuter Behavior Survey population consisted of 80 buildings, with a total of 119,264 employees and 2,815 tenant companies. The current building population is up from 2014 when we had 55,000 employees: and, 2017 with 96,000 people.

Individual building occupant counts were used to determine each member's required sample size. As shown in Appendix A, the number of surveys required was assigned based on occupant count, with a 1% minimum response rate required for each building.

The *TMASF Connects 2020 Commuter Behavior Survey* was conducted electronically using Survey Gizmo, an advanced online survey software tool. The *TMASF Connects 2020 Commuter Behavior Survey* instrument is provided at the end of this report as *Appendix C*.

TMASF Connects staff conducted outreach with the member building managers on the new survey process and timetable prior to the kickoff of the survey period.

In late January 2020, TMASF Connects staff sent an email to each building manager with the instructions and link to the *TMASF Connects 2020 Commuter Behavior Survey*. Through their existing email tenant/building notification system, each member building manager forwarded the survey link to their tenant contacts for distribution to employees working in the building.

We are pleased to report that the TMASF Connects collected the minimum required response rate from all 80 participating member buildings. In fact, more than 3.7% of all people working in TMASF Connects member buildings responded to this year's TMASF Connects survey. As in the past, to be consistent with the agreed-upon TMASF Connects methodology, this report

reflects the survey results for the 1% random sample, in aggregate and per building, as further explained below.

The final *2020 TMASF Connects Commuter Behavior Survey* results and the content of this report are based on the analysis of 1197 completed surveys, representing 1% of the member building population.

The survey consultant was responsible for gathering all survey responses. Once it was determined that all properties had met their 1% requirement, the individual response data was exported from Survey Gizmo into Access. Using Access, it was possible to identify the 1% number of surveys for each building in order of their entry (i.e. If 15 surveys were required, the first 15 submitted were selected). The Response IDs for these 1% were identified. This 1% subset was then imported back into SurveyGizmo so the data could be available in both formats.

This 1% subset in Access was used for required queries and cross-tabulations. These selection of the first surveys for each property to meet the 1% threshold were the responsibility of the third-party consultant and TMASF Connects staff did not participate in this process in any capacity. The consultant subsequently provided TMASF Connects with the raw data.

For statistical validation purposes, we adhered to the protocol of past surveys for our customary confidence interval of “3.” In accordance with previous surveys, we randomly sampled 1% of all members (119,264 total occupants) for a sample size of 1192 surveys. We also followed the past protocol and assumed a 95% confidence rate. The confidence interval is considered the “margin of error” and the confidence level tells you how sure you can be that the survey results reflect the total population. For the 2020 TMASF Connects survey sample, this means that we can be 95% certain that the true percentage of the population who would pick an answer is accurate to within +/- 3 percentage points.

This was the 14th Commuter Behavior Survey conducted by the TMASF Connects to demonstrate ongoing program compliance. Previous TMASF Connects surveys were conducted in 1990, 1992, 1994, 1996, 1999, 2002, 2005, 2007, 2009, 2011, 2013, 2014 and 2017. Over the years, the primary methodology and commute mode metrics have remained in order to evaluate historical commute patterns and demographic trends. Survey changes have been mainly organizational and stylistic to elicit clear response and in agreement with City Planning Department staff.

As detailed in this report, we believe the overall survey data and analysis reflect commute behavior across the member building population. We began the survey as Market Street was closing to cars. Toward the end of the survey, buildings were increasingly vacant due to the COVID-19 pandemic. These two major events may have skewed the results somewhat. By the end of the survey collection period in early March, many of our member building occupancy rates were decreased by as much as 80 - 90%.

From a quality assurance standpoint, the results also strongly support the reported drive-alone rate and overall data integrity as follows:

- A comparison of the 2020 TMASF Connects Survey data to prior survey results indicates consistent results across most survey responses and demographic characteristics. This consistency is also significant considering the 19% increase in total occupants working in TMASF Connects member buildings, from 96,705 to 119,264 people since 2017.
- The required protocols for identifying respondents to be counted as “drive alone” were consistent with all previously conducted surveys. We conservatively assume the primary commute mode as “drive alone” where unclear or inconsistent with other responses. Additionally, the CCSF require that any survey non-respondents are counted as drive-alone commuters.
- Many respondents provided comments in the open-ended questions that detailed their individual commute pattern and challenges. These responses to Questions 7-8 were analyzed to validate the respondent’s commute mode (longest trip) and any primary or secondary transit mode that ultimately brings them into the City of San Francisco.

Please see the Summary section at the end of this report to review key findings.

2020 Commute Modes and Drive-Alone Rate

The survey is intended to determine how commuters arrive in San Francisco.

Question 7 asked respondents how they **usually travel to work**, asking them to select the longest portion of their commute. The survey also offers a question to determine the **last commute trip** mode undertaken.

The 2020 survey results and breakdown of reported commute modes are shown in Table One, along with prior TMASF Connects survey data over the period 2005 - 2020. We are pleased to announce the key TMASF Connects transportation results as follows:

Drive-Alone Rate: Based on the survey results and analysis, the reported Drive-Alone rate is 11.0%. This means that 11.0% of survey respondents drive to work alone in their vehicle as their primary commute mode. **Of that number, 36% of those respondents report they are required to have a car to conduct their business. The overall drive-alone by choice rate is 7%.**

Public Transportation Use: 73.6% of survey respondents selected public transportation as their primary commute mode. As shown in Table One, 37.6% of all survey respondents ride BART to work as their primary mode, followed by San Francisco Muni (21.7%).

Carpool/Rideshare Used: The number of people sharing a ride continues to decline. Overall clustered carpool and rideshare declined from 5.4% to 3.9%. Casual carpooling saw a 50% decrease from 2.2% to 1.1%. Surprisingly, carsharing also decreased from 1.2% to .08% during the survey period.

Future surveys should consider changing this category to further clarify the question being asked. This question deals with ride hailing and not ridesharing services.

Finally, *bicycling* decreased moderately from 3.1% to 2.8% and walking increased from 5.3% to 6.8%.

Table One: Breakdown of Longest Commute Modes (Question 7) 2005 to Present

Primary Commute Mode	2020	2017	2014	2013	2011	2009	2007	2005
Public Transportation	73.6%	75.9%	73.8%	77.6%	73.1%	71.8%	68.3%	62.3%
BART	37.6%	38.1%	37.7%	34.3%	37.7%	35.4%	31.8%	29.7%
Muni	21.7%	20.3%	22.4%	27.6%	21.3%	22.4%	24.5%	25.3%
AC Transit	3.6%	4.4%	2.9%	3.4%	2.1%	3.1%	0.8%	1.4%
Caltrain	3.9%	4.9%	4.4%	4.9%	3.5%	3.5%	4.8%	1.8%
Samtrans	0.2%	0.1%	0.4%	0.2%	0.6%	1.7%	0.8%	0.5%
Golden Gate Transit Bus	2.3%	3.3%	2.0%	2.8%	3.9%	1.0%	1.5%	1.8%
Golden Gate Ferry	1.8%	1.2%	1.7%	1.2%	1.2%	2.3%	1.3%	1.6%
Alameda/Oakland/Vallejo/ Harbor Bay/South SF Ferry	1.7%	1.6%	1.3%	2.2%	1.7%	1.0%	1.3%	
Other public transit	0.8%	1.9%	0.9%	1.0%	1.1%	1.4%	1.5%	0.2%
Drive alone	11.0%	8.5%	9.7%	9.0%	11.6%	13.0%	13.5%	15.2%
Auto, gas powered	8.9%	7.1%	8.3%	8.0%	10.8%	12.2%	13.5%	15.2%
Auto, hybrid	2.1%	1.4%	1.5%	1.0%	0.8%	0.8%	0.8%	
<i>Auto, uses car for work</i>	4.0%	3.4%	2.0%	2.3%	3.7%	3.5%	6.8%	7.3%
Motorcycle/scooter	0.8%	0.7%	0.7%	0.2%	0.4%	0.4%	0.5%	2.1%
Carpool/Rideshare	3.9%	5.4%	7.5%	6.9%	7.9%	8.3%	9.1%	15.2%
Carpool (same people)	1.8%	1.6%	4.0%	3.4%	5.4%	5.4%	4.5%	7.1%
Casual carpool	1.1%	2.2%	2.9%	3.2%	2.3%	2.3%	2.8%	7.6%
Vanpool	0.2%	0.3%	0.1%	0.3%	0.2%	0.6%	1.8%	0.5%
Rideshare/Car Sharing Service	0.8%	1.2%	0.4%					
Employer Shuttle/Other	0.4%	1.0%	0.5%	0.3%	0.2%	0.1%	1.8%	
Walk	6.8%	5.3%	5.2%	4.5%	5.6%	3.5%	5.5%	3.9%
Bicycle	2.3%	3.1%	2.7%	1.5%	1.2%	2.5%	1.0%	1.4%
Work at home/telecommute	0.3%	0.1%	0.0%	0.0%	0.2%	0.4%	0.3%	
n=	1,197	983	755	597	483	483	400	435

Table Two below provides a summary of the 2020 survey results by clustered commute modes, with historical TMASF Connects survey data presented for 2005-2020:

Table Two: Clustered Commute Modes – USUAL TRIP TO WORK

TMASF Connects Primary Commute Mode	2020	2017	2014	2013	2011	2009	2007	2005
Public Transportation	73.6%	75.9%	73.8%	77.6%	73.1%	71.8%	68.3%	62.3%
Drive alone	11.0%	8.5%	9.7%	9.0%	11.6%	13.0%	13.5%	15.2%
<i>Drive alone by choice*</i>	7.0%	5.2%	7.7%	6.7%	7.9%	9.5%	6.8%	7.3%
Carpool/Rideshare	3.9%	5.4%	7.5%	6.9%	7.9%	8.3%	9.1%	15.2%
Walk/Bike/Other	11.5%	10.2%	9.1%	6.5%	7.4%	6.9%	9.1%	7.3%

**As noted throughout this report, drive alone by choice is total drive-alone rate minus those respondents using a car for company business. This metric has been used for more than 15 years.*

At the request of the City and County of San Francisco Planning Department, a new question was added in 2014 that asks commuters how they traveled for their **most recent or last trip** to work. Responses for the TMASF Connects surveys conducted between 2014 and 2020 are as follows:

Table Three: Clustered Commute Modes – MOST RECENT OR LAST TRIP TO WORK

Describe LAST TRIP to Work	2020	2017	2014
On public transit, shuttle, walked and/or biked	79.4%	82.3%	80.6%
In a carpool as the driver	1.5%	1.2%	1.9%
In a carpool as a passenger	3.7%	3.9%	4.4%
Drove alone, car share, taxi or rideshare (e.g. Uber)	14.0%	11.8%	12.9%
Worked remote/telecommute	1.4%	0.8%	1.9%

2020 Drive-Along Rate and Historical Trends

As shown above, the TMASF Connects Total Drive-Along Rate for 2020 is 11%. The drive-alone rate was calculated as the percentage of respondents who selected “drive alone” as the primary commute mode that brings them into the City and their work location. All vehicles occupied by the driver only are counted as a drive-alone, whether it be a conventional gas-powered or alternative/fuel efficient vehicle.

Question 14 asks respondents who regularly drive alone if their job requires them to have access to a vehicle. Approximately 4% of the drive-alone respondents said that their job requires them to have access to a vehicle.

Based on analysis of the survey data, we believe this to be an accurate assessment of the drive-alone rate for the TMASF Connects member buildings. As discussed in the survey methodology section, TMASF Connects followed strict CCSF protocols in the data evaluation and calculation of the drive-alone rate and other commute mode metrics. Following the strict protocols from the past, the Drive-Along by Choice rate is 7%.

2020 Public Transportation Use and Historical Trends

Table Four provides a breakdown of primary transit used by those who selected Public Transportation as their primary commute mode in Question 7. As shown below, public transit use decreased from 75.9% in 2017 to 73.6% in 2020. TMASF Connects Survey results which highlight demographic trends in commuter behavior are also discussed throughout this report.

Table Four: Public Transportation Used

Answer	2020	2017	2014	2013	2011	2009	2007	2005
Public Transportation	73.6%	75.9%	73.8%	77.6%	73.1%	71.8%	68.3%	62.3%
BART	37.6%	38.1%	37.7%	34.3%	37.7%	35.4%	31.8%	29.7%
Muni	21.7%	20.3%	22.4%	27.6%	21.3%	22.4%	24.5%	25.3%
AC Transit	3.6%	4.4%	2.9%	3.4%	2.1%	3.1%	0.8%	1.4%
Caltrain	3.9%	4.9%	4.4%	4.9%	3.5%	3.5%	4.8%	1.8%
Samtrans	0.2%	0.1%	0.4%	0.2%	0.6%	1.7%	0.8%	0.5%
Golden Gate Transit Bus	2.3%	3.3%	2.0%	2.8%	3.9%	1.0%	1.5%	1.8%
Golden Gate Ferry	1.8%	1.2%	1.7%	1.2%	1.2%	2.3%	1.3%	1.6%
Alameda/Oakland/Vallejo/ Harbor Bay/South SF Ferry	1.7%	1.6%	1.3%	2.2%	1.7%	1.0%	1.3%	
Other public transit	0.8%	1.9%	0.9%	1.0%	1.1%	1.4%	1.5%	0.2%

**Reported is percentage of total survey respondents that selected each public transit service.*

Question 8 asks respondents if they use a secondary transit mode that ultimately brings them into the City.

The survey results shown in Table Five below indicate that approximately 16% of respondents transferred to another type of public transit during their usual commute trip. This is consistent with past survey results, with a multitude of combinations representing diverse commute patterns used across the Bay Area.

Table Five: Percent of Public Transit Users that Transfer to Secondary Transit 2020

Transfer from (Primary Mode)	Transfer to (Secondary Transit)	2020
AC Transit, Alameda/Oakland/Vallejo Ferry, Bicycle, Caltrain, Carpool, Drive-Alone, Golden Gate Transit bus, Muni, SamTrans, Walk, WestCat	BART Train	4%
AC Transit, BART, Caltrain, Carpool, Drive- Alone, Golden Gate Transit ferry and bus, Motorcycle/Scooter, On-demand Ride Service, Shuttle, Taxi, Walk	MUNI (SF) Bus or Light Rail	7%
AC Transit, BART, Caltrain, Carpool, Drive Alone, Golden Gate Transit bus and ferry, Motorcycle/Scooter, MUNI, Walk, WestCat	Other	5%
No, I do not transfer		84%

Duplicative responses were deleted to avoid double counting (i.e., BART selected for both Questions 7 and 8). We believe this year’s results accurately reflect riders using more than one form of public transit during their daily commute.

Question 9 asked all respondents how they ultimately traveled to their building once they have arrived in the City via any mode (transit, drive, etc.) As shown in the table below, approximately 70% of commuters arrive within three (3) blocks of their work location. The remaining 30% of respondents reportedly travel at least 4 blocks from their last transit stop or parking location.

Table Six: Mode to Office Building from last Transit Stop or Parking Location

Answer	Less than 1 block	1- 3 blocks	4- 6 blocks	6+ blocks	Total
Walk	25%	41%	18%	8%	93%
Bicycle	1%	1%	1%	1%	4%
Scooter	1%	1%	1%	1%	4%

Home Counties

As in past years, the survey clearly indicates that the largest percentage of workers live in San Francisco. However, the most notable change is the 4.5% increase in respondents living in the City, with slight reductions for Alameda, Contra Costa, Marin and Santa Clara counties. The additional increase in San Francisco residents is likely linked to job creation and opportunity to live in The City. Employer shuttles and telecommuting are also options that allow commuters to live in The City and work elsewhere. The breakdown of survey respondents by home county is shown below. A detailed list of survey respondents by Home City is also provided in Appendix B.

Table Seven: Respondents by Home County

County	2020	2017	2014	2013	2011	2009	2007	2005
San Francisco	43.4%	38.4%	42.9%	43.9%	42.6%	45.0%	48.4%	46.7%
Alameda	21.5%	22.5%	20.3%	20.8%	17.7%	19.4%	19.4%	18.4%
Contra Costa	12.1%	13.4%	12.5%	12.2%	12.9%	12.6%	9.1%	11.7%
San Mateo	12.2%	12.8%	13.2%	10.8%	14.3%	13.2%	10.3%	10.3%
Marin	4.8%	6.3%	4.7%	4.7%	6.2%	4.8%	4.9%	5.1%
Solano	1.9%	1.6%	1.9%	1.9%	1.7%	1.4%	2.9%	3.0%
Santa Clara	2.2%	3.7%	2.9%	3.7%	2.7%	1.4%	2.0%	0.9%
Sonoma	0.7%	0.5%	0.8%	1.2%	1.2%	0.6%	1.0%	0.9%
Napa	0.2%	0.0%	0.1%	0.3%	0.4%		0.2%	
Inside Bay Area	98.9%	99.2%	99.3%	99.5%	99.8%	98.6%	98.3%	97.0%
Outside the Bay Area	1.1%	0.8%	0.7%	0.5%	0.2%	1.4%	1.7%	3.0%

Commute Characteristics

Question 5 asked respondents if they had changed their regular pattern of commuting in the past two years, including changing their home or office location. As shown below, 52% of all respondents indicated that they had made a change in their commute pattern, likely representing a general trend of a younger, high-tech workforce to move frequently. To confirm this assumption - see Table Eight.

Table Eight: Changed Daily Commute Pattern by Age Group

Answer	ALL	18-24	25-34	35-44	45-54	Over 55
Yes	52%	4%	23%	14%	7%	4%
No	48%	2%	14%	14%	12%	9%

As shown above, the largest percentages of commuters in the 18-24 and 25-34 age groups have changed their home or office location in the past two years, compared to less than 25% for the 35 – 44 and over age 45 groups.

Ridesharing Characteristics

Approximately 3.9% of total respondents selected rideshare (carpool, casual carpool, vanpool, rideshare or car share) as their primary commute mode. This represents a 1.5% decrease overall in rideshare use. Survey results also indicate an increase in on-demand services such as Uber.

Table Nine: Percent using Carpool/Rideshare

Answer	2020	2017	2014
Carpool (same people)	1.8%	1.6%	4.0%
Casual carpool	1.1%	2.2%	2.9%
Vanpool	0.2%	0.3%	0.1%
Car Share (Zipcar) or Rideshare (Uber, Lyft)	0.8%	1.2%	0.4%
Total	3.9%	5.4%	7.5%

Question 11 asks respondents selecting Carpool as their primary commute mode for the number of people in the vehicle. As shown below, the 2-person carpool is the most reported number.

Table Ten: Number of People in Carpools

Answer	2020	2017	2014	2013	2011	2009
2	49%	35%	41%	27%	39%	64%
3	20%	44%	43%	56%	45%	28%
4	26%	14%	14%	12%	13%	4%
5+ (Vanpool)	6%	7%	2%	5%	3%	4%

Arrival and Departure Times

The tables and graphs below display the arrival and departure times of respondents working in TMASF Connects member buildings. Approximately 70% of those surveyed arrive at work between 7:00 AM to 9:00 AM during the peak morning commute. An additional 21% of commuters reportedly arrive after 9:00 AM, suggesting a possible extension of the peak commute or flextime hours being allowed by more employers.

Departure trends are similar with 70% of respondents leaving work between 4:00 PM and 6:00 PM, during the typical evening commute. An additional 13% of commuters indicated they leave work after 6:30 PM. These trends suggest commuters are adjusting their work times and commute schedules given traffic/transit congestion and other considerations.

Table Eleven: Work Arrival Times

Answer	2020
Before 6:00 AM	3%
6:00- 6:30 AM	2%
6:30- 7:00 AM	4%
7:00- 7:30 AM	8%
7:30- 8:00 AM	17%
8:00- 8:30 AM	23%
8:30- 9:00 AM	22%
9:00- 9:30 AM	15%
After 9:30 AM	6%

Table Twelve: Work Departure Times

Answer	2020
Before 3:00 PM	2%
3:00- 3:30 PM	3%
3:30- 4:00 PM	3%
4:00- 4:30 PM	11%
4:30- 5:00 PM	15%
5:00- 5:30 PM	28%
5:30- 6:00 PM	16%
6:00- 6:30 PM	8%
6:30- 7:00 PM	7%
After 7:00 PM	6%

Carpool Parking

Questions 12 and 13 ask carpool drivers where they park their vehicle. Approximately 52% of respondents said that they park in the building where they work. About 29% of carpool drivers marked that they park in other parking lots or garages.

Table Thirteen: Carpool Parking Location

Answer	0 – 1 block	1- 3 blocks	4- 6 blocks	6+ blocks	Total
Building parking	52%	--	--	--	52%
On-street parking	5%	2%	2%	5%	14%
Special vanpool or carpool parking area	0%	0%	0%	5%	5%
Other parking lot or garage	2%	12%	2%	12%	29%

Question 15 asks all survey respondents about the availability and use of parking subsidies through their workplace. Results are presented in Table Fourteen, along with an analysis of respondents who selected drive-alone as their primary commute mode.

As shown below, 49% of those who drive-alone to work said that they receive free or subsidized parking. This data appears to support the conclusion that parking subsidies support one’s decision to drive their vehicle to work. We also want to point out the survey finding that a higher percentage of executives report driving alone to work. Others who are driving alone to work are driving company provided vehicles. As shown on Table Twenty-Three, the Executive/Manager job type represents 45% of drive-alone respondents with 67% of those indicating that they do receive free or subsidized parking through work. This parking benefit seems to encourage driving alone.

Table Fourteen: Free or Subsidized Parking through Work

Answer ALL RESPONSES	2020	Answer DRIVE-ALONE RESPONSES ONLY	2020
Yes, and I use it when I drive	11%	Yes, and I use it when I drive	49%
Yes, it is available to me, but I don’t use	7%	Yes, it is available to me, but I don’t use	0%
No. When I drive, I pay to park	26%	No. When I drive, I pay to park	46%
No, but I never drive anyway	43%	No, but I never drive anyway	--
I’m not sure	13%	I’m not sure	5%

Traffic/Transit Information Resources

Question 16 asked employees if they checked transit or traffic conditions prior to their morning or evening commute, and if so, where they obtain their transit information. A summary of the 2020 and prior TMASF Connects survey responses are shown below:

Table Fifteen: Sources for Transit Information

Answer	2020	2017	2014	2013	2011
Smartphone Phone/Tablet	46%	43%	26%	22%	8%
Computer	4%	8%	9%	9%	15%
TV	6%	10%	6%	12%	10%
Radio	5%	7%	12%	8%	8%
Do not check conditions	47%	44%	45%	48%	59%

Approximately 47% of respondents replied that they do not check transit or traffic conditions before they begin their commute.

Question 17 asks respondents who said they do check traffic or transit conditions if this information influenced a change in their commute. About 56% of these respondents said “Yes, it does influence their commute”, which is consistent with the 60% who selected “Yes” in 2017.

Table Sixteen: Influence of Transit Information on Commute

Answer	2020	2017	2014
Yes, influences commute	56%	60%	59%
No influence	44%	40%	41%

Building/Employer/TMASF Connects Services

Question 18 asked all respondents about their awareness and use of TMASF Connects services provided to the individual member buildings.

TMASF sends information to building managers, who then disseminate it to their employer point of contacts; who in turn; forward it to employees. While many employees receive services and information that originates from TMASF Connects, TMASF is often not identified as the source. The 2020 results reveal nearly 25% of survey respondents indicating they have used at least one of TMASF Connects services.

It is important to note the communication process between TMASF Connects and the ultimate member user – the employee. As stated earlier, our materials are delivered to property managers who then disseminate our information. In 2014, there were 55,000 people working in TMASF Connects member buildings. In 2017, there were 96,705 employees. In 2020, we counted 119,264 employees. These increasing numbers coupled with the 52% that have changed their office or home location in the past two years have created an ongoing need for TMASF Connects to offer continuous member introductory services.

The results shown below represent the percentage of total survey respondents who selected each option:

Table Seventeen: Building/Employer/TMASF Connects Services

Which of these Services have you used?	2020	2017	2014
TMASF Connects Website (includes full public transit, ridesharing, bicycling and other commute information)	7%	6%	7%
TMASF Connects Alerts & Advisories (includes large-scale weekend events, traffic & transit notifications, Spare the Air, and other regional programs)	12%	13%	15%
Raffles for Warriors, Giants, theater tickets through tmasfconnects.org	7%	8%	6%
Building Events	9%	9%	5%
Commute events in public places	2%	2%	5%
None / Other	78%	76%	72%
Total Survey Respondents (n) =	1,197	983	755

Of the 22% of members who have used our services, slightly more than half respondents routinely use our Advisories and Alerts programs. More than a third of respondents have participated in building events that TMASF Connects sponsors. Nearly a third of all surveyed who use program services visit the website with an additional third of users having entered raffles. The raffle program requires registering at the website, thus validating our high number of registered users. These results are mirrored in Table 18 that show a majority of all ages use the Advisories & Alerts program, participate in building events and register at the site to participate in the incentive raffles.

Table Eighteen: Breakdown of TMASF Connects Building Services Used

Which of these Services have you used?	
TMASF Connects Website (includes full public transit, ridesharing, bicycling and other commute information)	28%
TMASF Connects Alerts & Advisories (includes large-scale weekend events, traffic & transit notifications, Spare the Air, and other regional programs)	53%
Raffles for Warriors, Giants, theater tickets through tmasfconnects.org	32%
Building Events	41%
Commute events in public places	8%

We further analyzed the TMASF Connects services reportedly used by Age Group and Job Type, with results shown in the table below. These demographics have been selected for evaluation as they exhibit the strongest trends and commute patterns as highlighted in this report.

Table Nineteen: TMASF Connects Building Services used by Job Type 

Which of these Services have you used?	ALL respondents	Professional/ Technical	Executive/ Managerial	Clerical	Sales/Other
TMASF Connects Website	28%	12%	38%	25%	4%
TMASF Connects Alerts & Advisories	53%	34%	70%	41%	3%
Participated in raffles/ promotions	32%	22%	39%	25%	2%
Participated in Building commute events	41%	39%	36%	35%	4%
Commute events in other public places	8%	4%	11%	5%	1%

Following are a few highlights and key insights from our analysis:

- TMASF Connects Alerts & Advisories are cited more frequently than any other service used by our members. More than 70% of respondents who identify as executive/managerial used the website primarily with slightly more than a third of them using the website and participating in raffles and promotions.
- Of the survey respondents that identified as professional/technical, more than a third used Alerts & Advisories and participate in building commute events.
- Respondents who identified as clerical also avail themselves to Alerts & Advisories. Nearly a quarter of these participate in raffles and promotions and visit the website. 35% have participated in building commute events.

Table Nineteen A: TMASF Connects Building Services used by Age Group

Which of these Services have you used?	ALL respondents	18 to 24	25-34	35-44	45-54	55+
TMASF Connects Website	28%	0%	31%	18%	23%	7%
TMASF Connects Alerts & Advisories	53%	3%	46%	34%	41%	24%
Participated in raffles/ promotions	32%	4%	29%	19%	23%	13%
Participated in Building commute events	41%	1%	42%	33%	23%	15%
Commute events in other public places	8%	0%	6%	7%	7%	1%

Following are a few highlights and key insights from our analysis:

- The number of people in our buildings age 18-24 are 6% of the population. Of that population, the raffles and promotions garnered the highest usage.
- Of the 25-34 age group, nearly half of them use the Alerts & Advisories and have participated in building commute events. Nearly one-third of people in this age group visit the website and participate in raffles and promotions.
- Of the 35-44 age group, nearly a third used the Alerts & Advisories and also participate in building commute events. People in this age group visit the website less than the 25-34 or 45-54 age groups.
- Of the 45-54 age group, 41% cite using the Alerts & Advisories and roughly a quarter of this age group participate in commute events, raffles and promotions, and visit the website
- The 55+ age group also use the Alerts & Advisories approximately a quarter of the time. This age group participates less fully in other TMASF services, with 7% claiming to use the website, and less than 20% participating in raffles, promotions, and building events

TMASF Connects accepts the survey findings in terms of usage of their services. It is important to note that Google Analytics and other tools provide a different perspective on the use of our website than the survey findings.

The TMASF Connects website has had requests for information and entries to win raffle promotions from more than 5,000 users and 97,000 total registrations as of March 1, 2020. In addition to distributing our information to members, TMASF Connects also share our campaigns with the 5,000 plus users who have registered at our website. As stated earlier, the 20% increase in new members compels TMASF Connects to be continuously introducing our programs and promotions.

Car Sharing and On-Demand Ride Hailing Services

Questions 7 and 10 include a new category and queries commuters about their use of Car sharing and Ride Hailing services. The results indicate no change in the commuter usage of Cars Sharing between 2014 and today.

Table Twenty: Car Sharing and On-demand Ride Service Usage

Which of these Services have you used?	2020		2017		2014	
	Yes	No	Yes	No	Yes	No
Car sharing service such as Zipcar, Enterprise or Carma?	18%	82%	19%	81%	18%	82%
On-demand ride service such as Uber, Lyft, etc.?	85%	15%	--	--	--	--

Ride Hailing services are clearly used by a significant part of the survey respondents. The 2020 survey is the first to query the use of Ride Hailing services.

Commuter Challenges and Needs

Two open-ended questions were asked at the end of the survey to better understand the needs and challenges faced by the San Francisco commuter:

- Describe any other commute assistance services that influence your decision about how to travel to work.
- What is your single largest commute problem (if any)?

Individual, anonymous comments for each of these questions have been provided to TMA SF Connects as a separate Appendix. Following is a brief summary of the overall trends and insights gleaned from the survey comments.

The question about commute services that impact travel decisions garnered 424 responses. Respondents were asked to describe any other commute assistance services that influence their decisions about how to travel to work. The overriding theme is criticism of current transit services and complaints in general about cleanliness, efficiency, safety and traffic congestion.

In an attempt to summarize the overall sentiment of commuters, we have conducted a keyword search by broad categories. The results are listed on the following page.

The following summary is an approximation, based on a keyword search:

Table Twenty-One: Other services impacting commute

Answer	Number of Comments
BART Service	72
MUNI Issues	45
Convenience of public transportation	32
Parking Costs & Availability	30
Ridesharing	30
Transit Costs/Subsidy/Pre-tax Benefit	13
Bicycle Accessibility	9
Carpool/Casual Carpool	5

Answers to the question about what services *would be helpful* in addressing their single largest commute issue garnered 280 responses. Answers ranged from increased frequency of service to improved apps used to general comments and feedback. Many respondents cited multiple issues. The following summary is an approximation, based on a keyword search:

Table Twenty-Two: Other Services Needed

Answer	Number of comments
BART	120
SFMTA	120
Arrival, Safety, Cleanliness	51
Traffic Congestion	23
Ferry travel	14

Demographics: Job Type and Age Group

Job Type

Respondents were asked to provide their job classification, with results for the 2014, 2017 and 2020 TMASF Connects surveys shown in the table below.

Table Twenty-Three: Survey Respondents by Job Type

Answer	2020	2017	2014
Professional/Technical	36%	45%	43%
Administrative/Clerical	27%	20%	26%
Executive/Managerial	29%	25%	21%
Sales / Other	8%	10%	10%

The 2020 findings are consistent with past survey results. Professional/Technical and Executive/Managerial make up 65% of all commuters surveyed. They also make up 70% of all drive-alone trips that were recorded.

Table Twenty-Four: All Respondents vs. Drive Alone by Job Type

Answer	2020 ALL	2020 Drive Alone	2017 ALL	2017 Drive Alone
Professional/Technical	36%	25%	45%	31%
Administrative/Clerical	27%	21%	20%	15%
Executive/Managerial	29%	45%	25%	45%
Sales / Other	8%	8%	10%	9%

As with previous surveys, more highly compensated commuters are more likely to have paid parking which is linked to a higher drive alone rate. This trend remains fairly consistent throughout TMASF Connects Behavior Surveys conducted over the past 20 years.

Age Group

The following table displays the age groups of respondents, with survey results presented for the 2020 and prior 2017 TMASF Connects survey.

Table Twenty-Five: Survey Respondents by Age Group

Age Group	2020	2017	2014
18-24	6%	7%	11%
25-34	37%	35%	32%
35-44	25%	20%	23%
45-54	18%	20%	20%
55+	13%	18%	14%

We also conducted an evaluation of drive-alone respondents by age group. Like job type, there is a clear distinction in commute behavior for certain groups. As further illustrated below, the 25-34 age group appears twice as likely to use alternative transportation. The 25-34 age group represents 37% of all survey respondents, but accounts for only 21% of respondents who reportedly drive-alone. The 45-54 and 55+ age groups who account for 31% of all survey respondents represents 31% of those who regularly drive-alone to work.

Table Twenty-Six: ALL vs. Drive-Alone by Age Group

Answer	2020 ALL	2020 Drive Alone	2017 ALL	2017 Drive-Alone
18-24	6%	5%	7%	3%
25-34	37%	21%	35%	17%
35-44	25%	24%	20%	19%
45-54	18%	31%	20%	37%
55+	13%	18%	18%	24%

Summary

The *TMASF Connects 2020 Commuter Behavior Survey* was conducted in compliance with the CCSF required protocols and random sampling methodology. A total of 1197 building occupants were surveyed within the 80 TMASF Connects member buildings participating in the survey.

We have conducted extensive analysis of primary commute data and survey responses relating to commuter behavior and demographic trends. We believe that the results of this analysis support the data integrity and overall survey methodology as required by the City and County of San Francisco. We feel that this survey represents valuable insights for the TMASF Connects as we plan future activities.

The following is a summary of 2020 TMASF Connects Commuter Behavior Survey results and key findings:

1. The reported 2020 Drive-Along rate is 11% total. Of those, a third of respondents are using a company vehicle. In keeping with CCSF protocol, the drive-alone by choice is 7% which represents an increase of 1.4%.
2. Public transportation remains the most likely commute mode, with 73.6% of building employees surveyed reporting public transit as their primary commute mode. Overall, there was a decrease of more than 2% in public transportation use since 2017. Use of SFMTA/Muni service increased 20.3% in 2017 to 21.7% in 2020.
3. Through any commute mode (public transit, drive, etc.), 70% of respondents arrive within three (3) blocks of their work location. Additionally, an estimated 73% of carpool drivers park within a three (3) block radius of their work location.
4. Commuters increasingly rely upon real-time transit websites/apps and breaking news alerts to help them navigate their daily commute. 56% of survey respondents are influenced by information before they chose a commute time and mode. 47% of all respondents routinely check via their phone or tablet for updated, real-time commute information.
5. The 2020 TMASF Connects survey results illustrate consistent trends in commute behavior across various demographic categories including home county, age group, job type, change in commute patterns and other factors.

Recommendations

We believe that TMA SF Connects and its member buildings play a valuable role in providing commute assistance services to the nearly 120,000 people that occupy its member buildings. We intend to continue work with our existing and new member buildings to increase awareness and to keep our services relevant, visible and easily accessible to the building occupants. The shifting demographics also underscores the importance of tailoring outreach programs to appeal to the lifestyle and interests of the TMA SF Connects membership.

As stated earlier, many of our member buildings are credited with the information provided by TMA SF Connects that reaches their tenants. The increase in member building size and numbers from 55,000 in 2014 to 119,000 in 2020 further reinforces the need for a continuous cycle of introductory materials from TMA SF Connects.

Looking ahead, consideration should be given to refining the survey instrument. Technology, market conditions and transportation services have changed dramatically since the last update to this survey was undertaken by CCSF Planning staff and TMA SF Connects team in the early 2000's. Questions should be rewritten for greater clarity, consistency, and to reflect current conditions. In addition, asking more 'why' questions provide more insight into commute patterns and preferences.

Given the radical change in the employment picture for the entire country and the expected loss of jobs in San Francisco, consideration should be given to conducting a follow-up survey in 2021. As of this survey, people cited personal safety concerns about using public transportation. As the Coronavirus causes huge shifts not only in total employment but how (when and where) employees will work; public transit also faces a new public health challenge. These factors all speak to the usefulness of conducting a 2021 survey.

The anticipated reduction in employment, increased use of telecommuting and the overall fatigue expressed by public transportation users points to very different commute patterns developing in the near future. Future survey instruments should also include questions about the ever-increasing use of employer shuttles and ride hailing services.

As we move forward, TMA SF Connects will begin preparation of a ten-year work plan reauthorization for both the Commute and Career Programs (Planning Codes 163 and 164 respectively). While the information from this survey will be analyzed and incorporated as appropriate, the future of San Francisco employment will be the ultimate factor for future program planning. To that end, more frequent surveys that do not require 1% participation from *every member* should be considered. We have entered a time of great change and measuring commuter sentiment and modal choices is key to providing effective programming.

Appendix A –TMASF Connects Member Buildings -- 2020

Office Building Code	Tenant Count	Employee Count	Surveys Requested (1%)	Surveys Received (1%)
1	33	1,500	15	15
2	7	300	3	3
3	5	2,000	20	20
4	12	3,000	30	30
5	1	780	8	8
6	1	460	5	5
7	1	990	10	10
8	28	1,325	13	13
9	38	2,000	20	20
10	65	4,000	40	40
11	25	500	5	5
12	55	800	8	8
13	23	1,600	16	16
14	1	1,400	14	14
15	32	1,200	12	12
16	19	2,650	27	27
17	56	780	8	8
18	5	136	1	1
19	24	1,600	16	16
20	2	700	7	7
21	4	2,500	25	25
22	10	1,250	13	13
23	20	2,127	21	21
26	1,400	1,200	12	12
27	4	1,285	13	13
28	5	1,500	15	15
29	10	2,000	20	20
30	2	1,000	10	10
31	9	1,028	10	10
32	6	1,000	10	10
33	30	550	6	6
34	24	740	7	7
35	19	900	9	9
36	5	300	3	3
37	1	2,350	24	24
38	17	1,200	12	12
39	50	1,100	11	11
40	8	935	9	9
41	4	550	6	6
42	3	100	1	1
43	5	700	7	7

Office Building Code	Tenant Count	Employee Count	Surveys Requested (1%)	Surveys Received (1%)
44	2	450	5	5
45	33	450	5	5
46	9	1,000	10	10
47	55	2,200	22	22
48	1	1,800	18	18
49	12	3,035	30	30
50	22	3,689	37	37
51	15	2,400	24	24
52	27	2,500	25	25
53	21	1,500	15	15
54	1	800	8	8
55	32	1,200	12	12
56	18	500	5	5
57	23	800	8	8
58	27	2,100	21	21
59	35	1,200	12	12
60	31	250	3	3
61	30	660	7	7
62	25	1,800	18	18
63	5	850	9	9
64	15	4,500	45	45
65	17	2,500	25	25
66	15	8,000	80	80
67	48	2,300	23	23
68	14	850	9	9
69	22	1,100	11	11
70	10	2,500	25	25
71	27	1,350	14	14
72	3	2,200	22	22
73	25	3,500	35	35
74	17	500	5	5
75	20	900	9	9
76	17	1,400	14	14
77	14	3,000	30	30
78	16	225	2	2
79	17	1,500	15	15
80	1	1,126	11	11
81	18	300	3	3
82	6	293	3	3
TOTALS	2,815	119,264	1,197	1,197

Appendix B – Home City of Survey Respondents

City	County	Count
San Francisco	San Francisco	499
Oakland	Alameda	112
Daly City	San Mateo	34
Alameda	Alameda	30
Walnut Creek	Contra Costa	27
San Mateo	San Mateo	25
Berkeley	Alameda	24
San Leandro	Alameda	23
Concord	Contra Costa	17
San Rafael	Marin	15
Hayward	Alameda	14
Pacifica	San Mateo	13
Fremont	Alameda	13
South San Francisco	San Mateo	12
Richmond	Contra Costa	12
Dublin	Alameda	12
Burlingame	San Mateo	11
Redwood City	San Mateo	10
San Jose	Santa Clara	10
Vallejo	Solano	10
Sausalito	Marin	10
Pleasant Hill	Contra Costa	10
Novato	Marin	8
Belmont	San Mateo	8
Millbrae	San Mateo	8
San Carlos	San Mateo	8
Pleasanton	Alameda	7
Moraga	Contra Costa	7
Mill Valley	Marin	7
Pittsburg	Contra Costa	7
Castro Valley	Alameda	7
San Bruno	San Mateo	7
Lafayette	Contra Costa	6
Hercules	Contra Costa	6
Emeryville	Alameda	6
El Cerrito	Contra Costa	6
Fairfield	Solano	6
Danville	Contra Costa	6

City	County	Count
Orinda	Contra Costa	5
Sunnyvale	Santa Clara	5
San Lorenzo	Alameda	5
San Ramon	Contra Costa	5
Menlo Park	San Mateo	5
Larkspur	Marin	5
Antioch	Contra Costa	5
Martinez	Contra Costa	4
Palo Alto	Santa Clara	4
Tiburon	Marin	4
Petaluma	Sonoma	4
Kentfield	Marin	4
Santa Clara	Santa Clara	3
Pinole	Contra Costa	3
Brentwood	Contra Costa	3
Alamo	Contra Costa	3
Piedmont	Alameda	3
Vacaville	Solano	3
Albany	Alameda	3
Benicia	Solano	3
Half Moon Bay	San Mateo	3
Brisbane	San Mateo	3
Foster City	San Mateo	3
San Anselmo	Marin	2
Bay Point	Contra Costa	2
Union City	Alameda	2
Oakley	Contra Costa	2
Napa	Napa	2
El Sobrante	Contra Costa	2
Tracy	San Joaquin	2
Livermore	Alameda	2
Milpitas	Santa Clara	2
Corte Madera	Marin	2
Hillsborough	San Mateo	2
San Pablo	Contra Costa	2
Rodeo	Contra Costa	2
Kensington	Contra Costa	2
West Oakland	Alameda	1
Santa Rosa	Sonoma	1
Mountain View	San Mateo	1

City	County	Count
Penngrove	Sonoma	1
Fairfield	Sonoma	1
Montara	San Mateo	1
Newark	Alameda	1
El Granada	San Mateo	1
Diablo	Contra Costa	1
Cotati	Sonoma	1
Suisun City	Solano	1
Campbell	Santa Clara	1
Fairfax	Marin	1
Marin City	Marin	1
Mountain View	Santa Clara	1
Saratoga	Santa Clara	1
Patterson	Stanislaus	1
Nicasio	Marin	1
Roseville	Placer	1
Los Altos	Santa Clara	1
Sacramento	Sacramento	1
Hayward	Contra Costa	1
Fremont	Contra Costa	1
Discovery Bay	Contra Costa	1
Chicago	Out of State	1
Clayton	Contra Costa	1
Galt	Sacramento	1
Santa Cruz	Santa Cruz	1

Appendix C –TMA SF Connects Survey Instrument

TMA SF Connects 2020 Commuter Behavior Survey

1) What is the address of the building that you work in? (dropdown list) *

2) What is the county of your home residence? (dropdown list)*

What is the city of your home residence? _____

3) What time do you typically arrive at work? *

- Before 6:00 AM
- 6:00- 6:30 AM
- 6:30- 7:00 AM
- 7:00- 7:30 AM
- 7:30- 8:00 AM
- 8:00- 8:30 AM
- 8:30- 9:00 AM
- 9:00- 9:30 AM
- After 9:30 AM

4) What time do you usually leave work for the day?*

- Before 3:00 PM
 - 3:00- 3:30 PM
 - 3:30- 4:00 PM
 - 4:00- 4:30 PM
 - 4:30- 5:00 PM
 - 5:00- 5:30 PM
 - 5:30- 6:00 PM
 - 6:00- 6:30 PM
 - 6:30- 7:00 PM
 - After 7:00 PM
-

5) Have you changed your regular pattern of commuting to work in the past 2 years (including if you moved your home or work location)?*

- Yes
- No

6) For your last trip to work, how did you travel?*

- On public transit, shuttle, walked, and/or biked
- In a carpool as the driver
- In a carpool as a passenger
- Drove alone, car share, taxi, or rideshare (e.g. Uber)
- Work at home / telecommute / remote

7) How do you usually travel to work for the longest portion of your commute? Please select only one option.*

- BART Train
- MUNI (SF) Bus or Light Rail
- AC Transit (Local/Transbay Bus)
- Caltrain
- SamTrans Bus
- Golden Gate Transit (Bus)
- Golden Gate Transit (Ferry)
- SF Bay Ferry -- Alameda/Oakland/Vallejo/Harbor Bay/South SF
- Drive Alone, gas-powered vehicle
- Drive Alone, hybrid/electrical/alternative fuel vehicle
- Carpool (same people everyday)
- Casual Carpool (whoever picks me up/I pick up)
- Vanpool
- On-demand Ride Service (Uber, Lyft, etc.)
- Carsharing Service (Zipcar, Enterprise, Carma, etc.)
- Taxi
- Walk
- Bicycle
- Motorcycle/ Scooter
- Work at home/ telecommute/ remote
- Employer or other shuttle service
- Other public transit (describe): _____
- Other (describe): _____

8) In addition to the primary mode selected for the above question, do you then transfer to another type of public transportation that ultimately brings you into the City? *

- BART
- MUNI Bus or Light Rail
- Employer Shuttle
- Other (please specify): _____
- No, I do not transfer to another public transportation system

9) After arriving in the City per the above questions, do you walk, bike or scooter to ultimately arrive at your office building? If so, how many blocks does it take to get there? Please check all that apply. If n/a, please skip to Question #10.

	Less than 1 block	1- 3 blocks	4- 6 blocks	6 or more blocks
Walk	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bicycle	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Scooter	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

10) If you don't walk, bike, or scooter to ultimately arrive at your office, how do you get there? If n/a, please skip to Question #11.

- Carpool/ Vanpool
- Employer/ Other Shuttle
- Taxi/ Uber or Lyft
- Carshare
- Drive Alone
- Other: _____

11) If you selected carpool or vanpool for Question #7, how many people (including yourself) are usually in the vehicle? If you do not regularly carpool or vanpool, please skip to Question #14.

- 2 people
- 3 people
- 4 people
- 5 people or more

12) If you are the driver of a carpool or vanpool, do you usually park at a spot at your office building? If n/a, skip to Question #14

Yes

No

13) If you are the driver of a carpool or vanpool and do not park at your building, where do you park? Please indicate how many blocks away you park from your office. If n/a, please skip to Question #14.

	Less than 1 block	1- 3 blocks	4- 6 blocks	6 or more blocks
On-street parking	[]	[]	[]	[]
Special vanpool or carpool parking area	[]	[]	[]	[]
Other parking lot or garage	[]	[]	[]	[]

14) If you regularly drive alone to work, is it because your job requires you to have access to a vehicle?*

Yes

No

N/A -- I do not regularly drive alone to work

15) Do you have free or subsidized parking available through work, whether within your building or nearby?*

Yes, and I use it when I drive

Yes, it is available to me but I don't use it

No. When I drive, I pay to park in a parking facility open to the public, or I park on-street

No, but I never drive anyway

I'm not sure

16) Before you begin your morning or evening commute, do you check transit or traffic conditions? (Check all that apply)*

- Yes, on the computer
- Yes, on the radio
- Yes, on TV
- Yes, by smart phone/tablet
- Yes, I check someplace else (please describe):

No, I do not check

17) If you selected "Yes" for Question #16, does that information influence a change in the way you commute? If n/a, please skip to Question #18.

Yes (please describe): _____ No

18) TMASF Connects offers a large number of commute services available to commuters in member buildings. The building you work in is a TMASF Connects member building. Which of these services have you used? (Check all that apply)*

- TMASF Connects Website (includes full public transit, ridesharing, bicycling and other commute information)
- TMASF Connects Alerts & Advisories (includes large-scale weekend events, traffic & transit notifications, Spare the Air, and other regional programs)
- Raffles for Warriors, Giants, theater tickets through tmasfconnects.org
- Building Events
- Commute events in public places
- Other (Please describe): _____
- None

19) Have you used a carsharing service such as Zipcar, Enterprise, or Carma?*

Yes No

20) Are you interested in learning more about carsharing programs in SF?*

Yes No

21) Describe any other commute assistance services that influence your decisions about how to travel to work:

22) What services would be helpful in addressing your single largest commute issue?

23) What is your job classification?*

- Executive/Managerial
- Professional/Technical
- Administrative/Clerical
- Sales
- Other (describe): _____

24) What is your age range?*

- Under 18
- 18-24
- 25-34
- 35-44
- 45-54
- 55+

Thank you for your participation!