



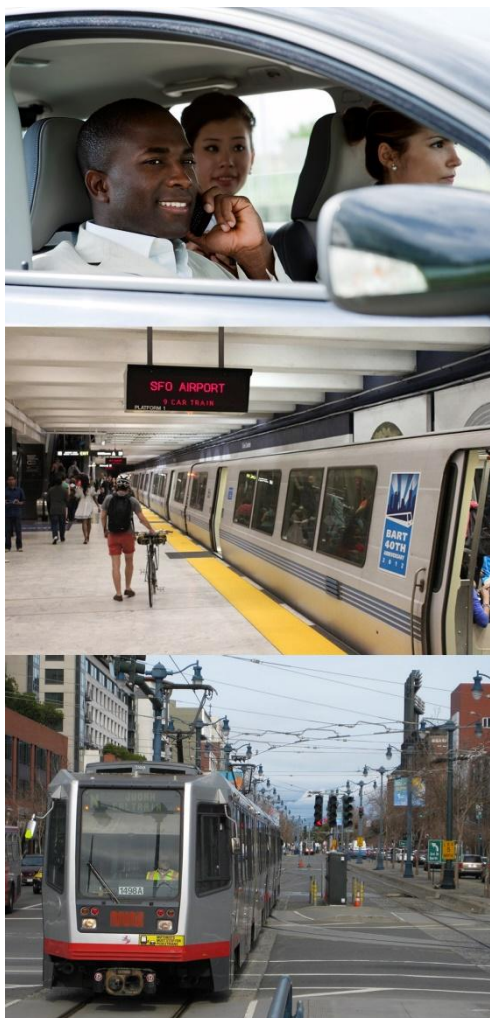
SF Environment

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A Department of the City and County of San Francisco

2014 Bay Area Commuter Survey Report

September 2014



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BAY AREA
AIR QUALITY
MANAGEMENT
DISTRICT

EXECUTIVE SUMMARY

The 2014 Transportation Survey provided an opportunity to uncover quantitative and qualitative data on the choices different types of people make, the motivations behind those choices, and what incentives may encourage them to try less impactful modes of transportation to work.

The most notable outcomes were:

- 61 percent of respondents reported that they commute via public transportation;
- 41 percent of respondents reported that their companies offer pre-tax deduction for transit/vanpool coupled with other incentives to promote a greener commute; and
- Of the 302 respondents who currently drive alone to work, 93 percent were willing to try using a more sustainable form of transportation either occasionally or on a regular basis.
- 48 percent of respondents requested further information about programs and incentives, indicating the survey's effectiveness as a promotional tool for the City's programs.

The Commuter Survey provided useful information about commuters' choices and motivations which can inform future programs and outreach efforts. In addition it provided clear data about where people access data and information and the most effective channels for communication.

ACKNOWLEDGEMENTS

The Clean Transportation program at the San Francisco Department of the Environment (SF Environment) would like to thank the following companies for generously donating prizes for the survey:

Bay Area Bike Share
Clipper Direct
Commuter Benefit Solutions
Luce Restaurant, Intercontinental San Francisco
The Real SF Tour
San Francisco Municipal Transportation Agency (SFMTA)

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1. INTRODUCTION

Every day, over 522,000 workers commute into San Francisco County.¹ The majority of these workers are commuting from San Mateo, Alameda, and Contra Costa counties.² Additionally, almost 100,000 San Francisco residents leave the city to work in nearby counties.³ When compared to the national average, San Francisco commuters have a high rate of sustainable transportation use (walking, biking, taking transit and ridesharing).⁴ About 36 percent of these commuters drive alone and 33 percent take public transportation, compared to the national average of about 76 percent and five percent, respectively.⁵

The City of San Francisco is committed to achieving the goal of reducing greenhouse gas (GHG) emissions to 80 percent below 1990 levels by 2050. Currently, the transportation sector accounts for approximately 43 percent of greenhouse gas emissions in San Francisco. The travel habits of San Francisco residents and commuters to and from work have a significant impact on the city's carbon footprint and air quality.

In an effort to reduce the carbon footprint of San Francisco's transportation sector and to achieve the larger goal of reducing GHG emissions, the City has established the current transportation goal that 50 percent of all trips should be made through sustainable modes.

This report assesses the results of the 2014 Bay Area Commuter Survey, which was to understand current transportation behavior of employees travelling in and out of San Francisco. The information collected through this survey was used to:

- Better understand commuter behavior and the motivations behind this behavior. In particular, to better understand commuters decision to drive alone to work
- Better understand incentives that will motivate commuters to shift towards sustainable forms of transportation.

The survey was conducted by the Clean Transportation program at the San Francisco Department of the Environment (SF Environment). The mission SF Environment is to improve, enhance, and preserve the environment, and to promote San Francisco's long-term environmental well-being. SF Environment includes Zero Waste, Toxics Reduction and Integrated Pest Management, Environmental Justice, Clean Transportation, Climate Change, Energy, Green Building and Public Information Programs. The Clean Transportation Program works to improve air quality in San Francisco, primarily by reducing vehicle emissions, through programs to reduce drive alone travel and alternative fuels infrastructure and policy.

¹MTC data analysis of ACS 2006 data

² Ibid.

³ Ibid.

⁴ Ibid.

⁵ SF Residents-2012 ACS 3-year summary data)

2. 2014 COMMUTER SURVEY

The Clean Transportation team conducted the 2014 Commuter Survey to get a snapshot of commuter travel behavior in the Bay Area. The analysis of how and why people travel to work provides the Clean Transportation team with critical data about potential areas of focus, current outreach effectiveness and program success, along with areas for improvement such as more targeted messaging.

The survey was developed and published using an online survey platform, Wufoo. The link, with appropriate background on the purpose of the survey, was sent through various channels to commuters. Incentive prizes were offered to encourage commuters to complete the survey. Some of the organizations which distributed the survey via Facebook, Twitter and email newsletters include SF Environment, 511.org Rideshare, Bay Area Bike Share, SF Bicycle Coalition, SPUR and Spare the Air/Bay Area Air Quality Management District. Further, The Clean Transportation team contacted its employer email list with a separate incentive to distribute the survey to their employees.

The majority of people heard about the survey through a direct email from one of the promotional partners. A further 18 percent were informed through Facebook posts or Tweets from the partners. A total of 1,831 people completed the survey over a four-week period February 17 to March 24, 2014.

The survey was dynamic; a respondent's answer to one question informed the subsequent questions. For example, only commuters who responded that they drove alone to work were asked further questions about their reasons and motivations for driving. In addition, some questions allowed selection of multiple responses or reasons. As a result, the sample size varies by question.

The main topics covered by the survey were:

1. Primary mode of commute to and from work;
2. The reasons behind choosing the respective primary forms of commute to and from work;
3. Incentives that will motivate single occupancy vehicle commuters to shift towards lower-emission forms of transportation; and
4. Current incentives or benefits offered by employers related to commuting.

Subscribers to the partnering organizations must be assumed to represent a more environmentally-aware, sustainable transportation-oriented sample group. As a result of distributing the survey through these channels, the responses captured in the survey cannot be assumed to be indicative of the general population. The full survey questionnaire can be found in Appendix A. For graphical representation of survey results see Appendix B.

3. RESPONDENT DEMOGRAPHICS

Demographic questions were included to ascertain whether behaviors and motivations varied according to these variables. This data also shows whether the survey reached a representative cross-section of commuters.

The majority of respondents were within the 25-54 age group (78 percent) and the income bracket was evenly spread, with 36 percent above \$100,000 annual household income.

Survey respondents were commuting largely within San Francisco or from the East Bay. The main destination was the downtown/financial district. One third of respondents travelled more than 20 miles to get to work, with 60 percent taking more than 30 minutes to commute one way regardless of distance travelled.

Participants were asked the best method for providing news/information to them. The overwhelming preference across all age groups is electronic media with online news media/blogs and e-newsletters the top two categories. Use of social media is high amongst younger people, while commuters over the age of 55 also get their news and information from printed newspapers.

4. PRIMARY COMMUTE MODE

Amongst those surveyed, 61 percent currently use public transit, and a total of 89 percent use sustainable modes of transportation which includes public transit, cycle/walk and carpool/vanpool. This finding is directly related to the long commute distances and times reported by a majority of respondents.

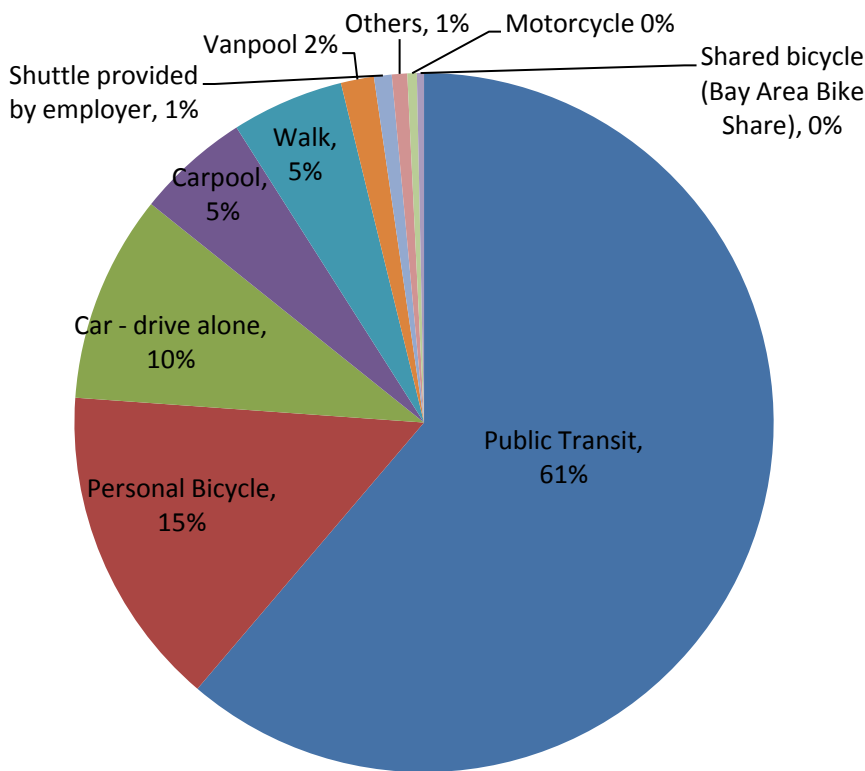


Figure 1: Primary Mode of Commute

n= 1831

Personal bicycle is used by 15 percent of survey respondents as the primary mode of commute, which is higher than the 3.6 percent reported in the (SF Residents-2012 ACS 3-year summary data). This reflects the bias in the selected population surveyed.

To gain an understanding of why people select their primary mode, the selections were analyzed against objective demographic data, as well as asking the respondents for their reasons in making that selection. Tables outlining the results of these cross tabulations can be found in Appendix C.

The key finding in this analysis was that a longer commute time and distance correlated to an increased use of public transportation. For commute trips that took longer than ten minutes, there was a linear increase in commuters taking public transit. It is interesting to note that drive alone commuting did not increase significantly as commute length increased.

Age and income had limited influence on commute mode choice, although drive-alone commuting tended to increase slightly with age group although it averaged 12-18 percent across age groups. Interestingly, use of carpool also increased across the older age groups, becoming almost equivalent to drive-alone in the 55-64 age group and surpassing drive-alone in the 65 or older age group.

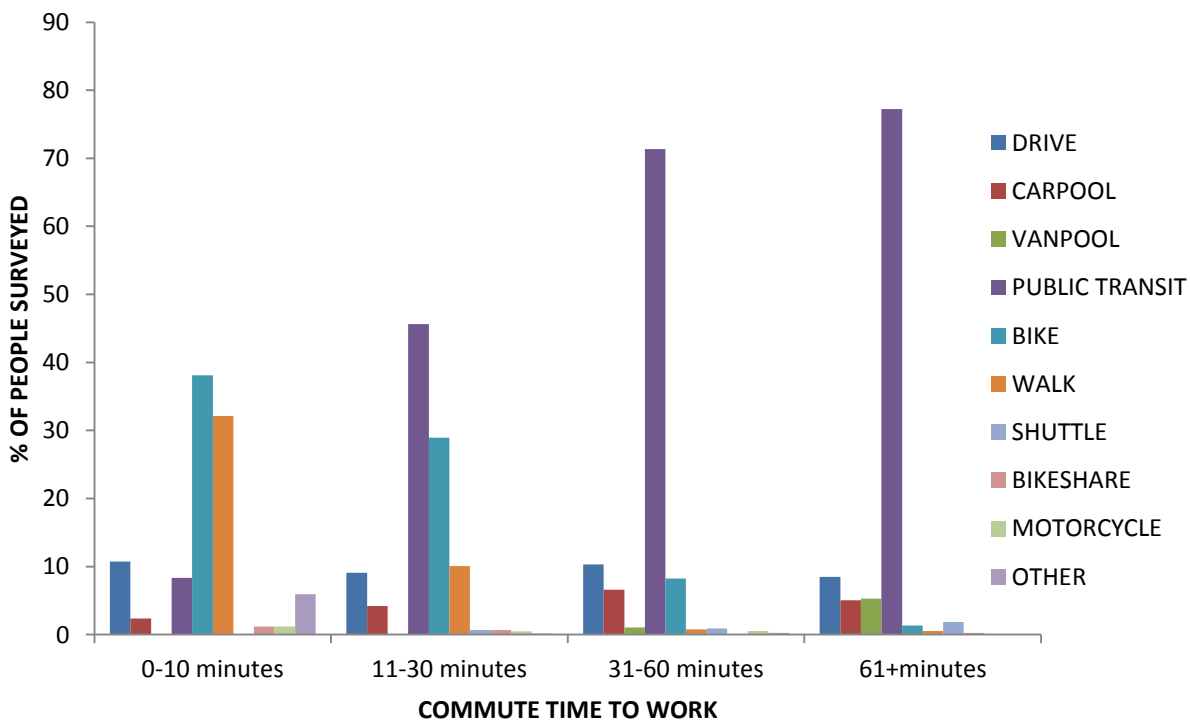


Figure 2: Commute Time and Primary Commute Mode

n= 1831

4.1 PRIMARY COMMUTE MODE - PUBLIC TRANSIT

61 percent of commuters surveyed use public transit to get to work. As seen above, the proportion rises as distance from workplace increases.

The majority of commuters using transit are travelling to work destinations in more built-up areas such as the Downtown and Financial Districts. For these commuters, the lack and expense of parking, and the convenience of transit stops to their workplace are significant factors in choosing transit.

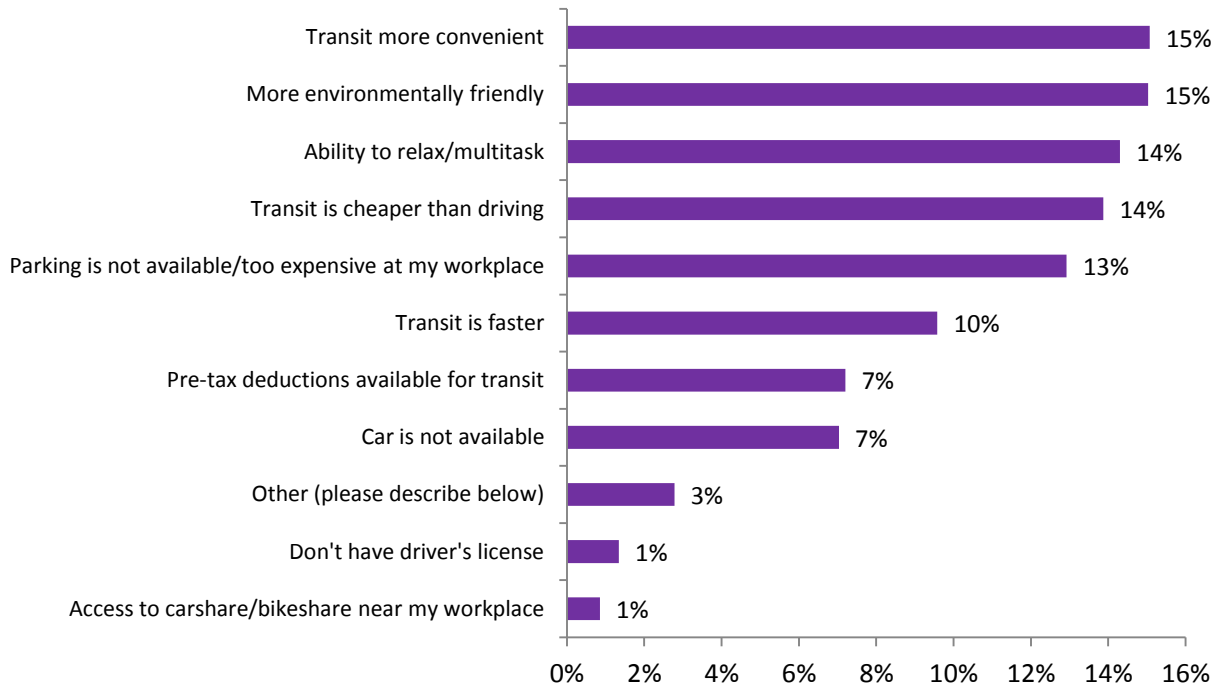


Figure 3: Reasons for Taking Public Transit

n= 5501

2014 San Francisco Commuter Survey Transit Primary Mode by Work Location Zip Code

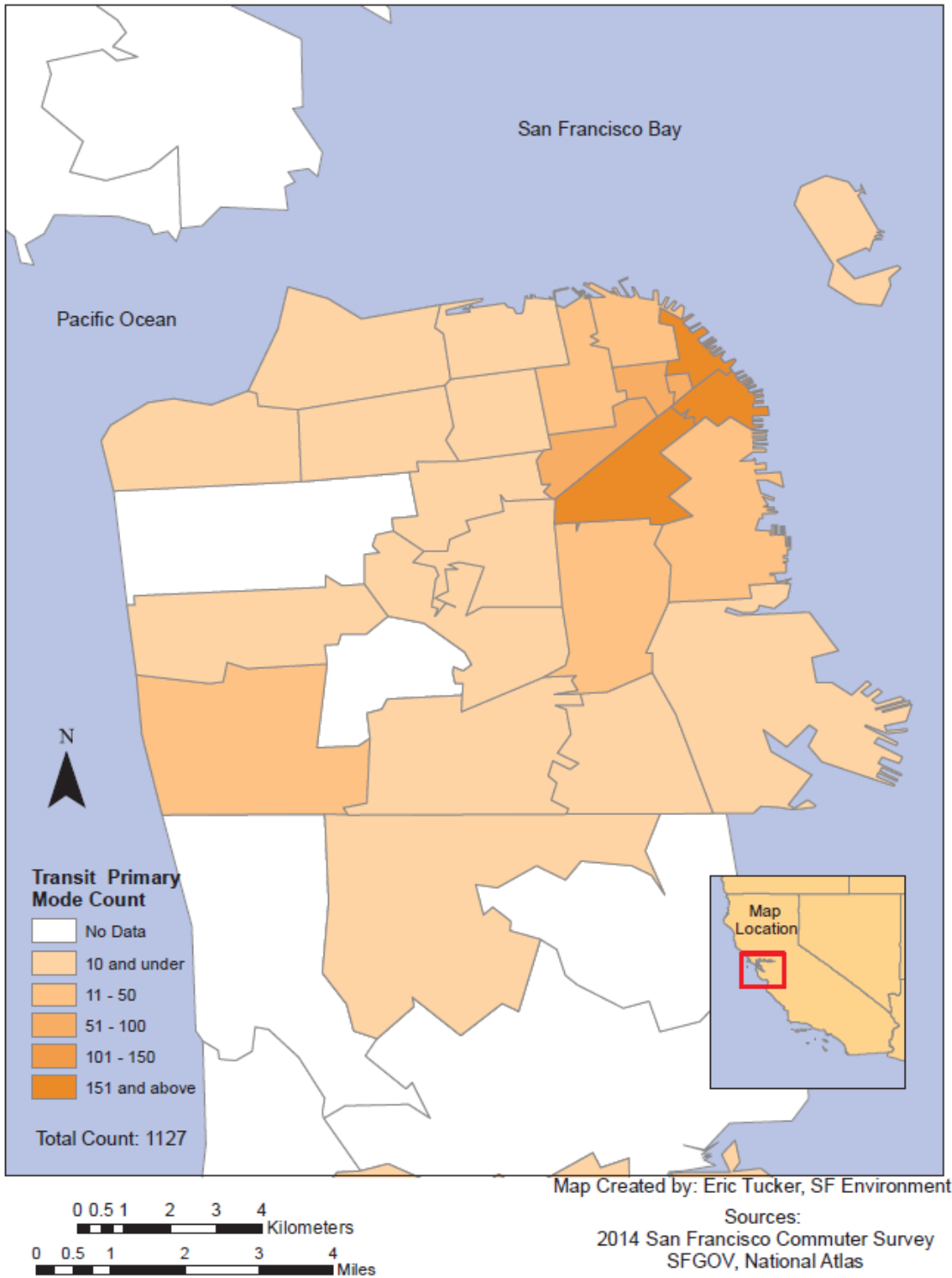


Figure 4: Workplace Distribution of Transit Users

n= 1127

4.2 PRIMARY COMMUTE MODE - CARPOOL

Two of the main reasons why respondents choose to carpool is the time and money savings. A question for exploration in future surveys or focus groups would be whether these benefits are perceived in comparison to driving alone, or to taking transit.

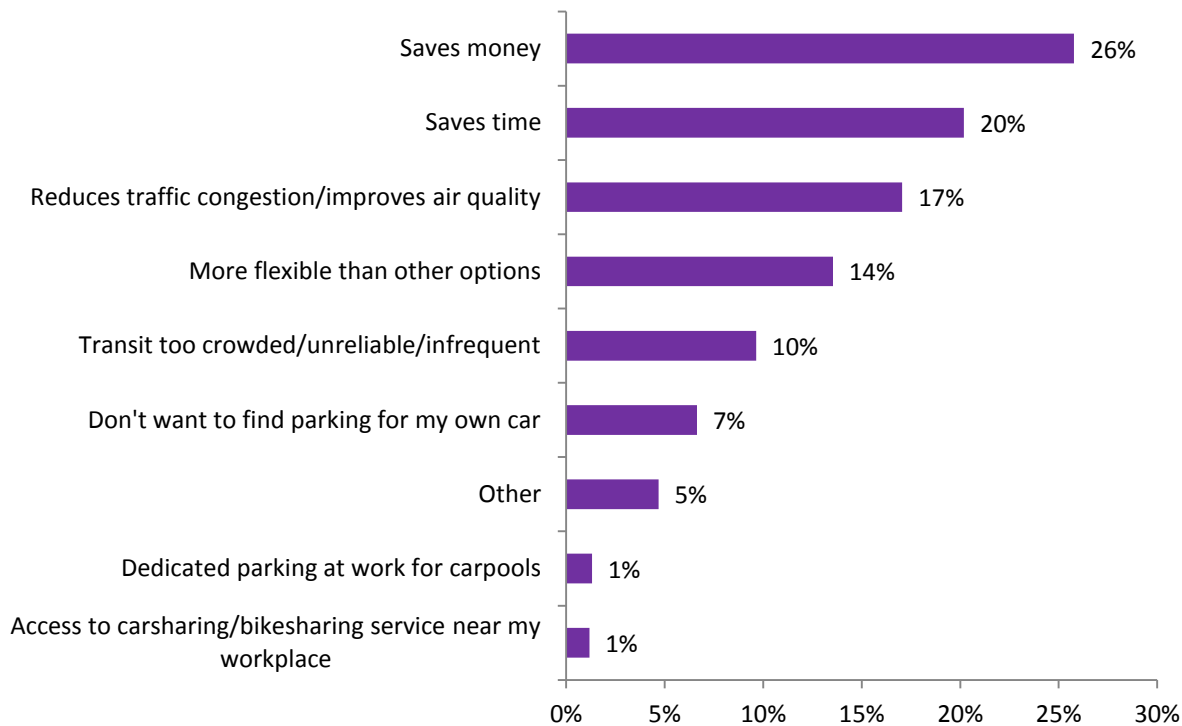


Figure 3: Reasons for Carpooling

n= 768

The majority of carpools in this survey population use the casual carpool (35 percent) or carpools organized with people they already know (family/friends 35 percent, coworkers 18 percent). The low use of organized rideshare matching services (eight percent 511.org vanpool, three percent 511.org carpool) is notable and deserving of further analysis to uncover perceived issues with using such systems. Inability to find a carpool match emerged as an impediment to carpooling for drive-alone commuters in another section of the survey. Further efforts to improve the matching system would be beneficial, as would education about how to use the system in future outreach campaigns.

4.3 PRIMARY COMMUTE MODE - BICYCLE

Respondents who bike as their primary mode of commute choose to do so for a large variety of reasons, including speed, cost savings and flexibility. Health and environmental benefits were also important. The vast majority of bike commuters park their bikes at their workplace rather than transit stations. However, 30 percent did not have secure bike parking at their workplace.

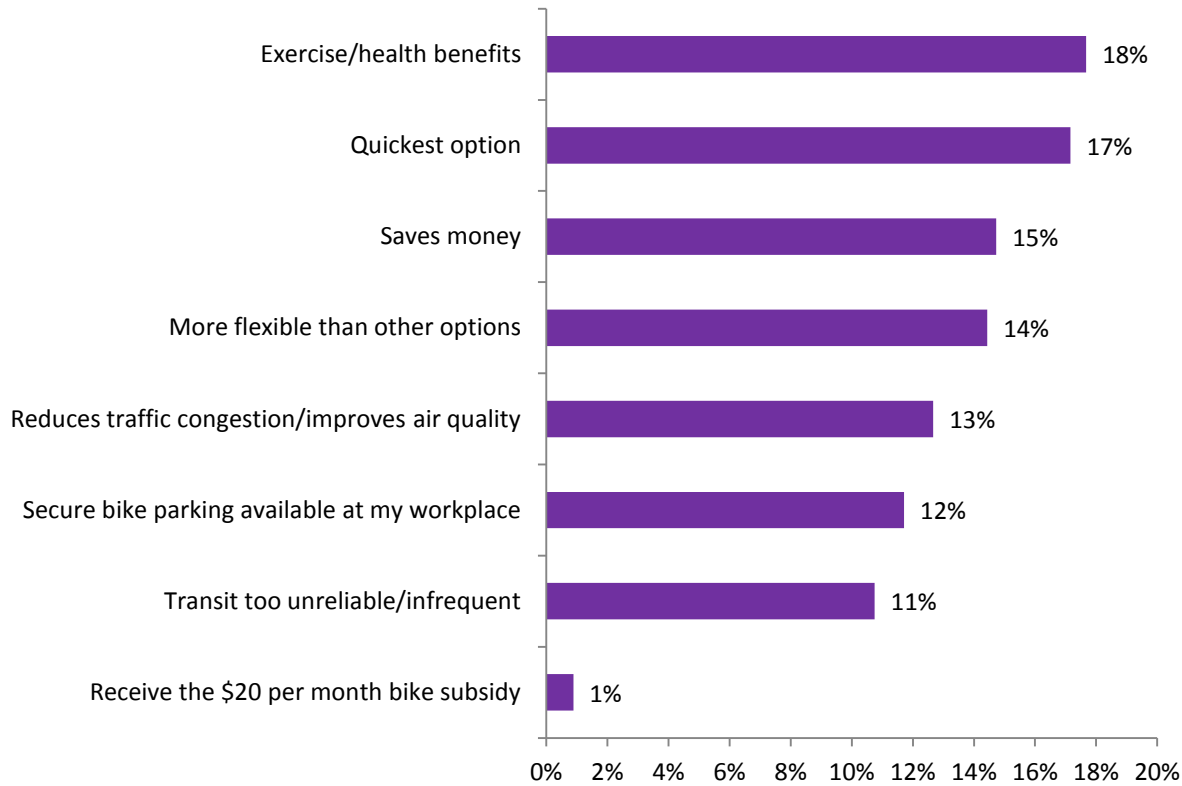


Figure 4: Reasons for Biking

n= 1358

4.4 PRIMARY COMMUTE MODE – DRIVE ALONE VEHICLE

While only 10 percent of commuters surveyed stated that they drive alone to work, this number is likely as high as 40 percent higher across the general population, according to the SFMTA's 2013 Transportation Fact Sheet.⁶

Understanding the reasons behind the choice to drive alone was a major impetus for conducting this survey. To design effective programs to encourage these drivers to either carpool or move to other less impactful modes of transportation, examining the motivations behind the data is critical.

Survey respondents who chose single occupancy vehicle as their primary form of commute were asked to select the primary reason behind their choice. The two overwhelming reasons for driving alone are because of its convenience and because there is no access to transit in the vicinity of where they live or work.

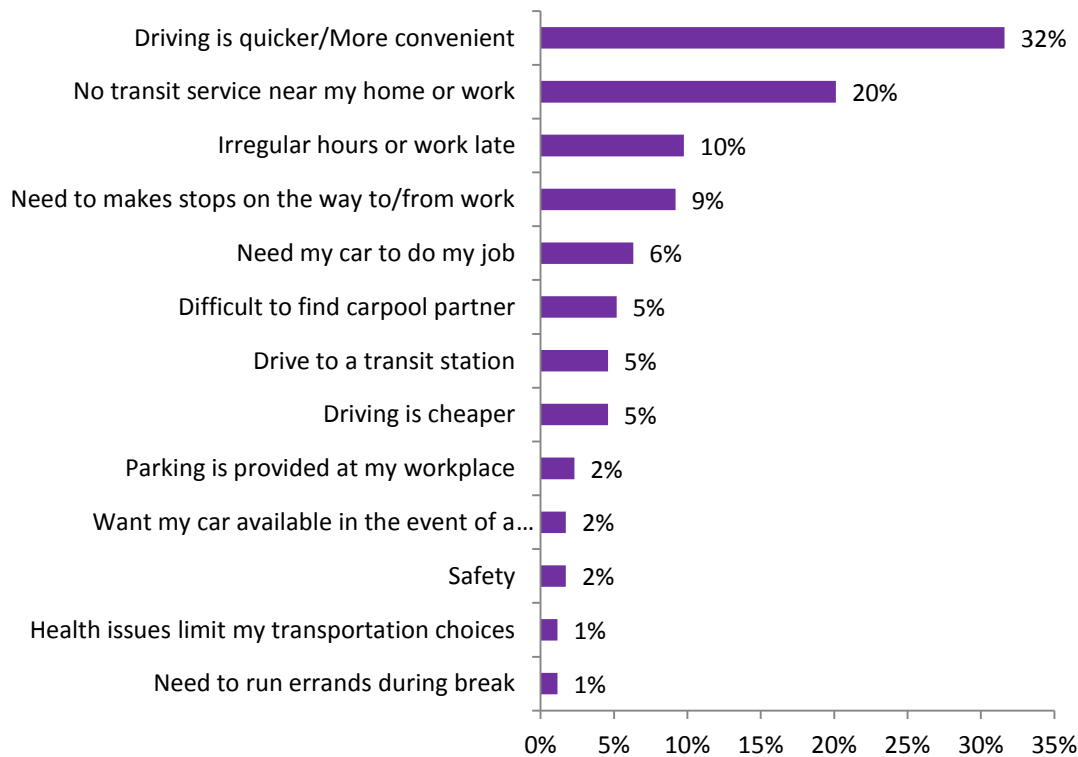


Figure 5: Reasons for Drive Alone

n= 176

Since convenience is a relatively subjective concept, future campaigns could focus on shifting the perceptions of the convenience of public transit, or comparative data between public transit and actual drive times during peak hours.

Lack of transit service is a larger issue but exploration of alternative ways to access the existing transit

⁶ <http://www.sfmta.com/about-sfmta/reports/2013-transportation-fact-sheet>

system could be explored. For example, carpool to transit stations with preferred parking for carpools and better more secure bike parking at transit.

In addition to motivation, analysis of the origin and destination of drive-alone commutes was revealing. Of the 87 commuters driving alone to a work location in San Francisco, 70 percent are commuting into the City from other counties, primarily the East Bay.

This data implies that in selecting geographic areas of focus for campaigns promoting mode shift away from single occupancy vehicles and reducing greenhouse gas emissions **in** San Francisco, agencies should also be giving attention to the cities and counties where the commute originates.

Studying the destination zip codes for those commuters who drive alone seems to corroborate their stated reasons for choosing that mode. Essentially, their work locations are less convenient for transit and are likely have cheaper parking options available.

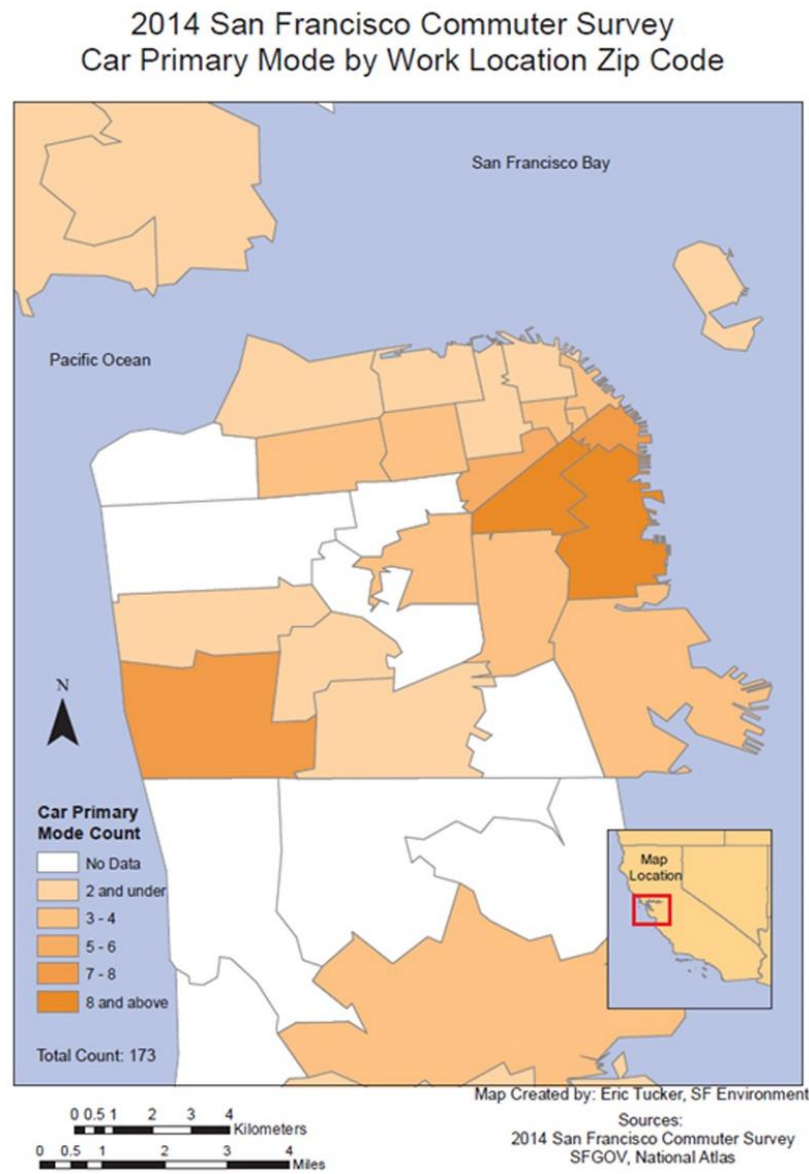


Figure 8: Car Commuters by Work Location

n= 173

5. INCENTIVES TO SWITCH AWAY FROM DRIVE ALONE COMMUTING

The survey respondents who currently drive alone to work were asked to select the top three incentives that would motivate them to shift their mode choice to more sustainable forms of transportation. An encouraging 93 percent of drive-alone commuters stated they would be willing to try a sustainable mode such as public transit and carpooling.

One incentive available to all modes is the City's Emergency Ride Home program. Approximately 12 percent of SOV commuters appear to be unaware of this program and its ability to remove some of the barriers to leaving the car at home.

5.1 INCENTIVES TO SWITCH TO PUBLIC TRANSIT

One of the key motivations that would encourage commuters to shift to using public transit is to provide financial incentives for doing so. However, only five percent of drive alone commuters cited financial reasons as a reason for their mode choice.

Another popular motivation would be to provide shuttle services from transit stations to the workplace. As seen earlier in the report, one of the main reasons why commuters choose to drive alone is due to the lack of access to a transit station from their workplace. Hence, working with employers to provide shuttle services could be a possible option to shift commuters from driving alone towards public transit. It would also be worth exploring carpools to transit points from outlying suburban areas, as the incentives question only explored the end-of-trip connection issue in further detail.

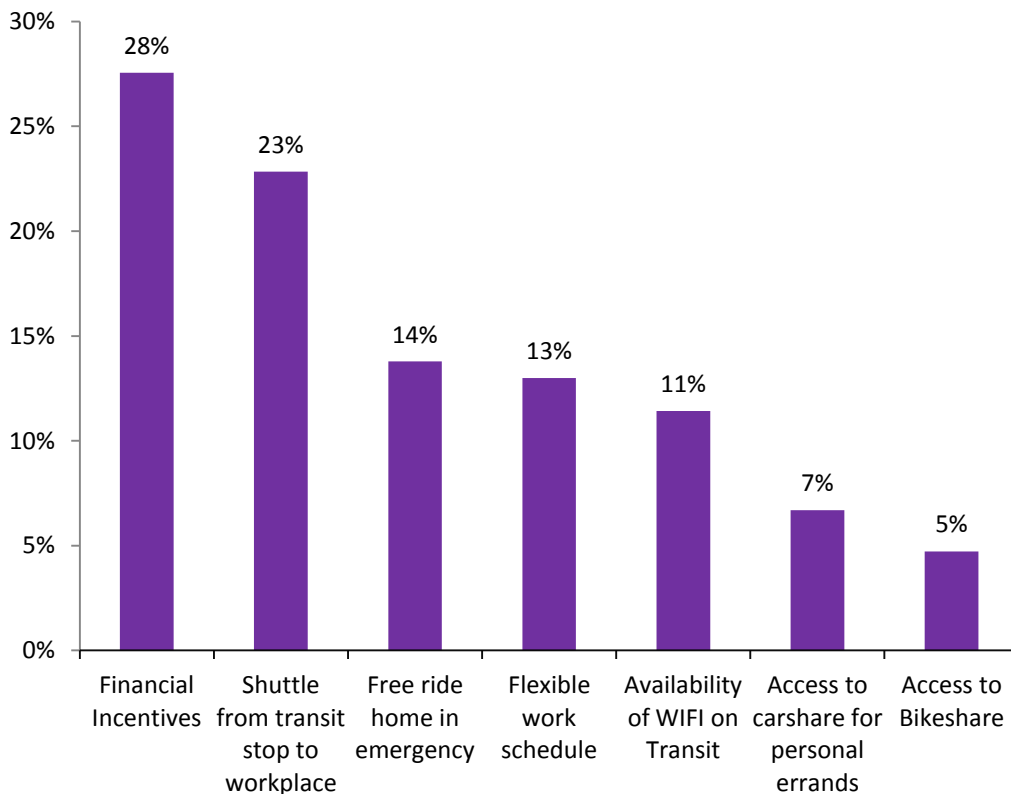


Figure 9: Incentives for Public Transit

n= 254

5.2 INCENTIVES TO SWITCH TO CARPOOLING

From Figure 10 below, it can be seen that one of the biggest perceived barriers that prevents drive alone commuters from carpooling is difficulty in finding the appropriate people with whom to carpool.

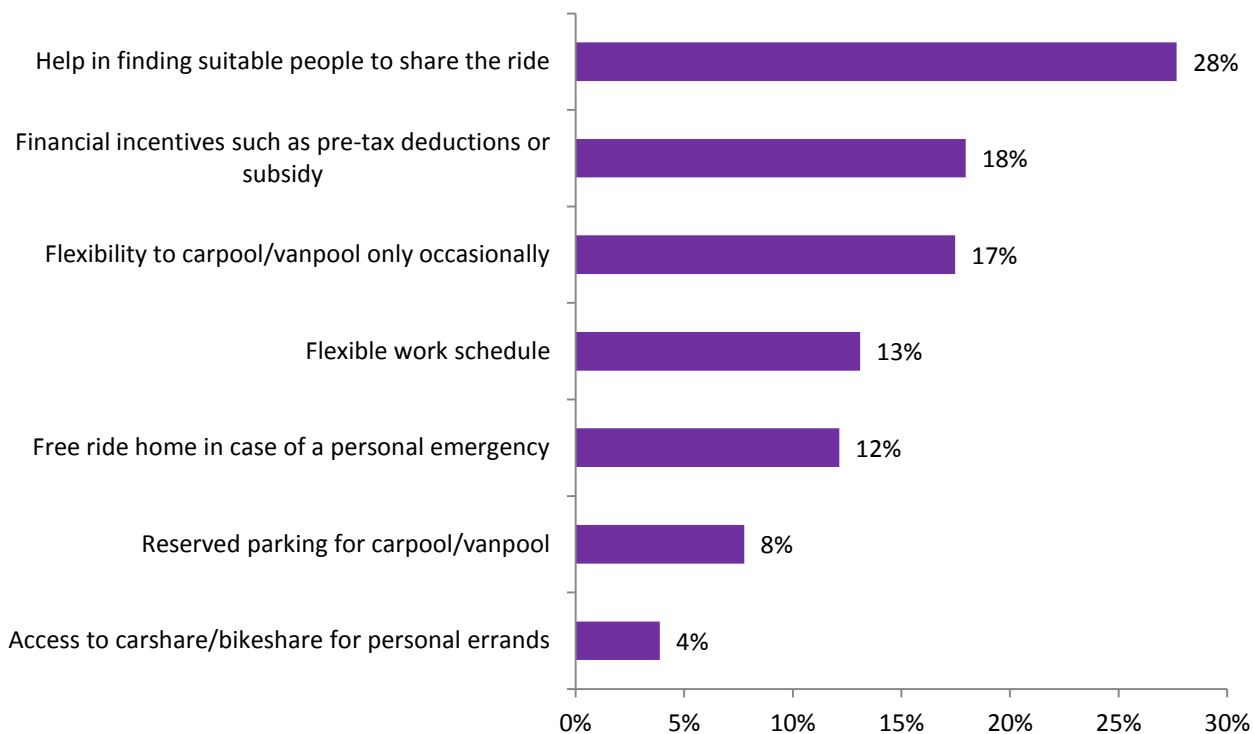


Figure 10: Incentives for Carpool/Vanpool

n= 206

As seen in Section 4.2 above, the majority of carpoolers do so with family and friends. Further promotion of and assistance with casual/informal carpools or exploration of alternative carpool matching platforms may be appropriate to influence drive alone commuters to fill up their empty car seats with carpool passengers.

5.3 INCENTIVES TO SWITCH TO CYCLING OR WALKING

The biggest motivation for current drive alone commuters to try walking or biking is to have shower facilities installed at the workplace. Another strong motivation to bike would be to have secure bike parking at work.

Working with employers and building management at office buildings through the Tenant Bicycle Parking in Existing Commercial Buildings Ordinance⁷ to provide these facilities would be one method of make biking or walking to work a more viable option for commuters.

The high level of interest in financial incentives indicated in the survey provides an opportunity to give better exposure to the bicycle benefit option in corporate commuter benefits programs.

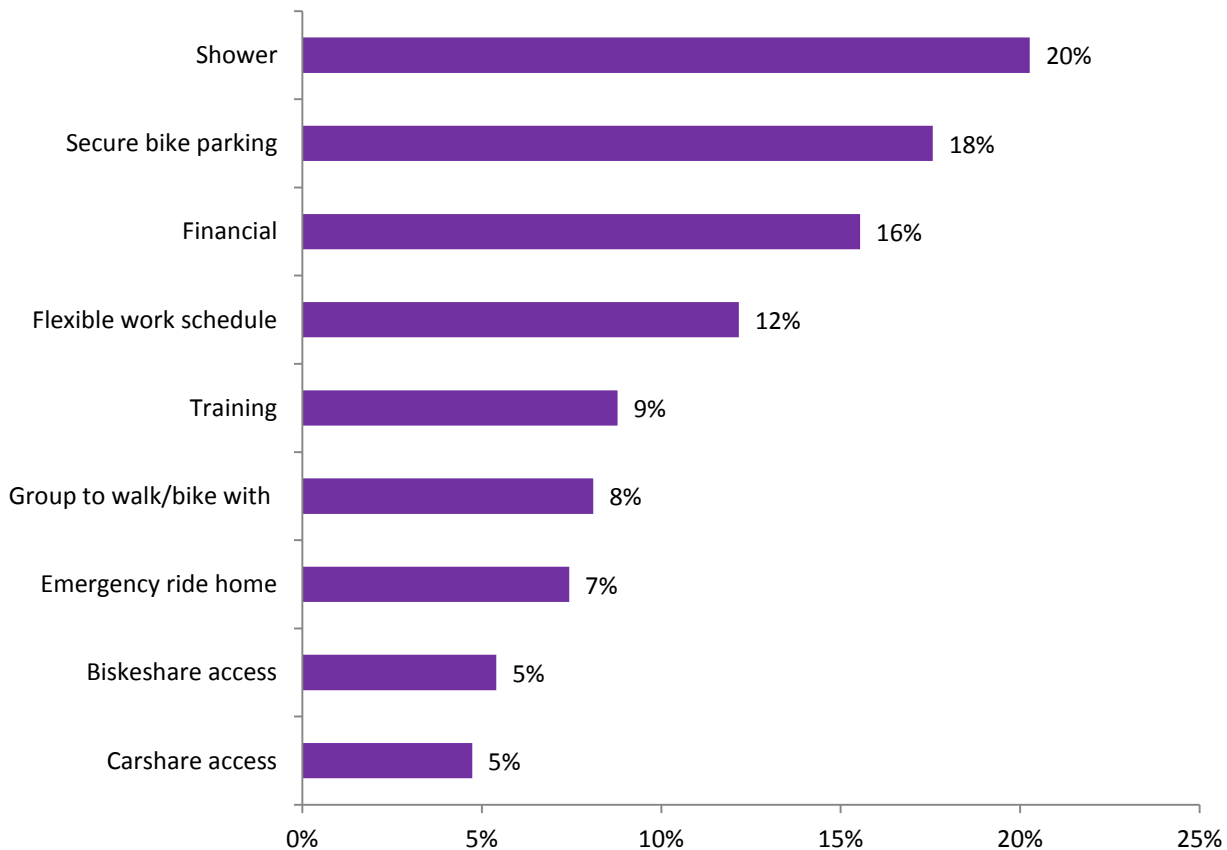


Figure 11: Incentives to Bike/Walk

n= 148

⁷ The Tenant Bicycle Parking in Existing Commercial Buildings Ordinance encourages commuting to work by bicycle and requires commercial property owners to allow tenants to bring their bicycles into their building. SFEvironment.org/BikeAccess.

6. EXISTING COMMUTER INCENTIVES

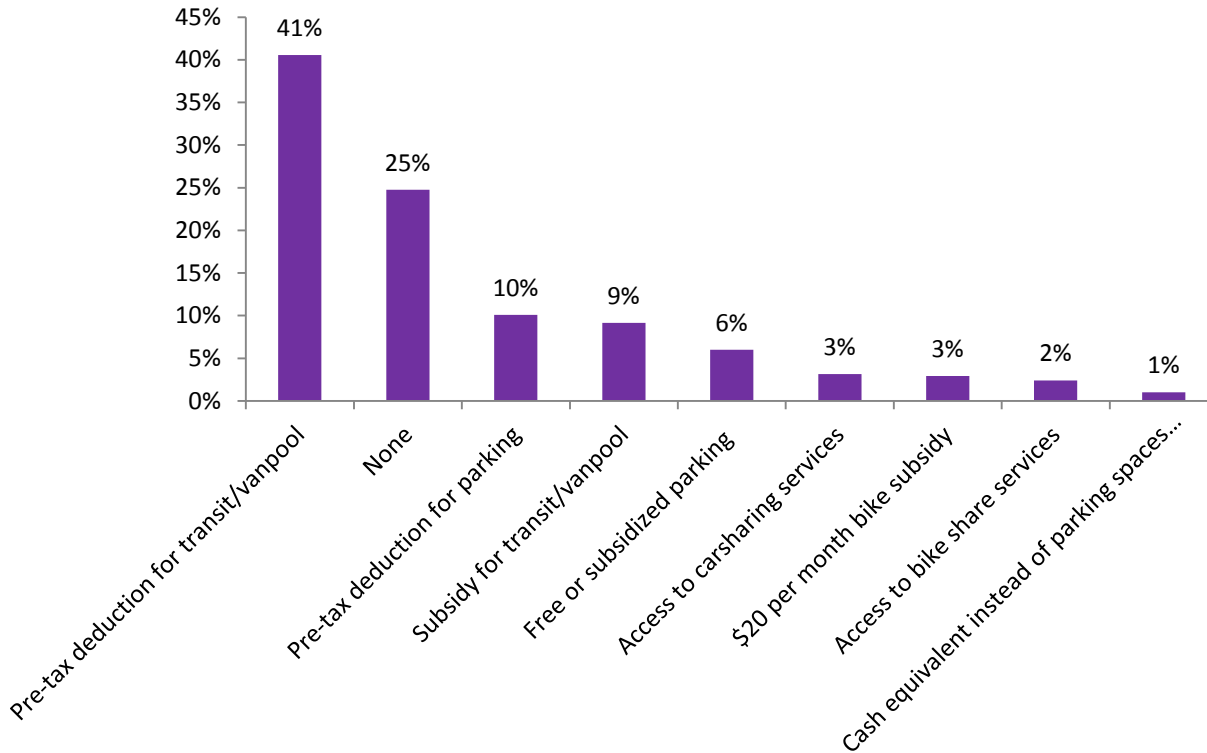


Figure 12: Existing Commuter Incentives

n=2,405

Many survey respondents already use the pre-tax deduction for transit and vanpool, although there is room for further outreach about the Commuter Benefits Ordinance.⁸ However, with 25 percent of people listing 'none' indicates a need for further outreach, both to inform employers of their obligation to provide commuter benefits, and to ensure employers which offer the incentives are taking adequate steps to inform their staff on how to access the benefits.

⁸ The San Francisco Commuter Benefits Ordinance was adopted in 2009 to encourage commuters to take transit, bike, or rideshare to work by requiring their employers to offer commuter benefits. [SFEnvironment.org/CommuterBenefits](https://www.sfenvironment.org/CommuterBenefits).

7. IDEAL COMMUTE

Approximately 50 percent of all commuters would prefer to be using a different mode of transportation. These include those who would switch from driving alone, as well as those who would like to try a more active commute mode rather than public transit.

20 percent would like to ride either their own bicycle or utilize a shared bicycle service. 12 percent would like to carpool or vanpool, and eight percent switch to public transit.

Excluding those who are prevented from walking or cycling due to distance, the main issues preventing a switch are around **public transit routes and scheduling** – infrequent service, especially for those working outside peak hours, and in many cases the **increased trip time on public transit** (often up to twice as long as driving). **Perceived safety** while cycling was the reason for many to stay with public transit, and safety while taking public transit was a prominent reason for preferring to drive.

A thorough break-down of reasons preventing commuters from using their ideal commute mode can be found in Appendix B.

8. CONCLUSION AND RECOMMENDATIONS

The inaugural Commuter Survey both reinforced existing understanding of commuter motivations and patterns, and uncovered areas for further examination.

Key findings include:

- A lower than expected participation in the Pre-Tax Commuter Benefits Program. Increasing participation would yield many positive results:
 - Supports behavior of those already using public transportation
 - Reduces the cost burden for those currently driving alone
 - Transforms group norms: if people who already use public transit begin to save money, more people would be encouraged to tap into the benefits.
- Drive-alone commuters with short distances/time durations may be open to bicycling. Further promotion of the Tenant Bicycle Access in Existing Commercial Buildings Ordinance would be beneficial.
- 25 percent of 2405 responses said that their companies did not offer any benefits/incentives related to commuting. The Clean Transportation team can increase outreach efforts to promote the Pre-Tax Commuter Benefits Program, both to employers and to employees.
- A number of incentives already exist to address commuters' barriers to using more sustainable transportation modes. Additional outreach to improve awareness of the Emergency Ride Home Program and bicycle benefit in particular should be undertaken.
- A proactive approach to addressing concerns about access to public transit could encourage commuters who currently drive all the way to work, to drive, carpool or cycle to transit. Issues around availability of vehicle parking and security of bikes at transit stops would need to be addressed in conjunction with transit agencies.

APPENDIX A: 2014 COMMUTER SURVEY QUESTIONNAIRE

* INDICATES REQUIRED QUESTION

What is your home zip code? *

What is your work zip code? *

What is the distance one-way from home to your usual place of work? *

- under 2 miles 3-5 miles 6-10 miles 11-20 miles 21+ miles

How many minutes does your one-way commute typically take? *

- 0-10 minutes 11-30 minutes 31-60 minutes 61 minutes or more

What time do you typically start work? *

- peak hours (5-10am) outside peak hours

What time do you typically finish work? *

- during peak hours
 outside peak hours

How do you usually get to and from work? Select the main mode only. *

- | | |
|--|--|
| <input checked="" type="radio"/> Personal bicycle | <input type="radio"/> Shuttle provided by employer |
| <input type="radio"/> Shared bicycle (Bay Area Bike Share) | <input type="radio"/> Taxi |
| <input type="radio"/> Car - drive alone | <input type="radio"/> Vanpool |
| <input type="radio"/> Carpool | <input type="radio"/> Walk |
| <input type="radio"/> Motorcycle | <input type="radio"/> Other <input type="text"/> |
| <input type="radio"/> Public transit | |

What other forms of transportation do you use for your commute? (choose all that apply) *

- | | |
|---|---|
| <input type="checkbox"/> Personal bicycle | <input type="checkbox"/> Shuttle provided by employer |
| <input type="checkbox"/> Shared bicycle (Bay Area Bike Share) | <input type="checkbox"/> Taxi |
| <input type="checkbox"/> Car - drive alone, or motorcycle | <input type="checkbox"/> Vanpool |
| <input type="checkbox"/> Carpool | <input type="checkbox"/> Walk |
| <input type="checkbox"/> Public transit | <input type="checkbox"/> Not applicable |

Please select your primary reason for choosing to drive alone. *

- No transit service near my home or work Drive to a transit station

- Safety
- Driving is quicker/more convenient
- Driving is cheaper
- Parking is provided at my workplace
- Need to makes stops on the way to/from work
- Need to run errands during breaks

- Need my car to do my job
- Want my car available in the event of a personal emergency
- Difficult to find a carpool partner
- Irregular hours or work late
- Health issues limit my transportation choices

Please select your secondary reason for choosing to drive alone. *

- No other reason
- No transit service near my home
- I drive to a transit stop
- Safety
- Driving is quicker/more convenient
- Driving is cheaper
- Parking is provided at my workplace
- Need to makes stops on the way to/from work

- Need to run errands during breaks
- Need my car to do my job
- Want my car available in the event of a personal emergency
- Difficult to find a carpool partner
- Irregular hours or work late
- Health issues limit my transportation choices

Would you be willing to try any of the following ways of getting to work occasionally or on a regular basis? Check all that apply, *

- Bicycle Carpool Public transit Vanpool Walk Not willing to try any other ways

Which of the following would encourage you to use public transit? Choose your top 3. *

- Financial incentives such as pre-tax deductions or subsidy
- Shuttle from transit stop to workplace
- Access to carshare for personal errands
- Access to bikeshare
- Availability of WiFi on transit
- Flexible work schedule
- Free ride home in case of a personal emergency

Which of the following would encourage you to cycle or walk? Choose your top 3. *

- | | |
|--|---|
| <input type="checkbox"/> Financial incentives | <input type="checkbox"/> Access to carshare for personal errands |
| <input type="checkbox"/> Shower or locker facilities at work | <input type="checkbox"/> Access to bikeshare |
| <input type="checkbox"/> Secure bike parking at work | <input type="checkbox"/> Flexible work schedule |
| <input type="checkbox"/> A group of people to walk/cycle with | <input type="checkbox"/> Free ride home in case of a personal emergency |
| <input type="checkbox"/> Training on how to ride safely in traffic | |

Which of the following would encourage you to carpool or vanpool? Choose your top 3. *

- | | |
|---|--|
| <input type="checkbox"/> Financial incentives such as pre-tax deductions or subsidy | <input type="checkbox"/> Access to carshare/bikeshare for personal errands |
| <input type="checkbox"/> Help in finding suitable people to share the ride | <input type="checkbox"/> Flexible work schedule |
| <input type="checkbox"/> Reserved parking for carpool/vanpool | <input type="checkbox"/> Free ride home in case of a personal emergency |
| <input type="checkbox"/> Flexibility to carpool/vanpool occasionally | |

Please describe why you choose to take transit. Select all that apply. *

- | | |
|--|---|
| <input type="checkbox"/> Car is not available | <input type="checkbox"/> More environmentally friendly |
| <input type="checkbox"/> Don't have driver's license | <input type="checkbox"/> Pre-tax deductions available for transit |
| <input type="checkbox"/> Transit is faster | <input type="checkbox"/> Access to carshare/bikeshare near my workplace |
| <input type="checkbox"/> Transit more convenient | <input type="checkbox"/> Parking is not available/too expensive at my workplace |
| <input type="checkbox"/> Transit is cheaper than driving | <input type="checkbox"/> Other (please describe below) |
| <input type="checkbox"/> Ability to relax/multitask | |

Which transit systems do you use to get to and from work? Check all that apply. *

- | | |
|-------------------------------------|---|
| <input type="checkbox"/> AC Transit | <input type="checkbox"/> Muni |
| <input type="checkbox"/> BART | <input type="checkbox"/> Golden Gate Transit |
| <input type="checkbox"/> Caltrain | <input type="checkbox"/> Other transit agency |
| <input type="checkbox"/> Ferry | |

Which type of carpool or vanpool do you use? *

- | | |
|--|---|
| <input type="radio"/> Casual carpool | <input type="radio"/> Carpool organized with family/friends |
| <input type="radio"/> Carpool organized through 511.org
Ridematch service | <input type="radio"/> Vanpool organized by my employer |
| <input type="radio"/> Carpool organized with coworkers | <input type="radio"/> Vanpool organized through 511.org |

Why do you choose to carpool/vanpool? *

- Saves time
- More flexible than other options
- Reduces traffic congestion/improves air quality
- Saves money
- Transit too crowded/unreliable/infrequent
- Don't want to find parking for my own car
- Access to carsharing/bikesharing service near my workplace
- Dedicated parking at work for carpools
- Other (please describe below)

Why do you choose to cycle to work? *

- Quickest option
- More flexible than other options
- Reduces traffic congestion/improves air quality
- Saves money
- Receive the \$20 per month bike subsidy
- Transit too unreliable/infrequent
- Exercise/health benefits
- Secure bike parking available at my workplace

Do you change how you get to work seasonally? *

- Yes No

My seasonal change is....

Where do you park your bike? *

- Transit station At or near my workplace

Is there secure bike parking at or near your workplace?*

- Yes, secure parking in the building Yes, secure parking nearby No

If you would prefer to be using another form of transportation for part or all of your commute, what is it? *

- No changes needed
- Personal bicycle
- Shared bicycle (Bay Area Bike Share)
- Carpool
- Motorcycle
- Public transit
- Taxi
- Vanpool
- Walk

Please describe what is preventing you from using your preferred form of transportation to work.

Does your company currently offer any benefits/incentives related to commuting? Please check all that apply *

- | | |
|---|--|
| <input type="checkbox"/> Pre-tax deduction for transit/vanpool | <input type="checkbox"/> \$20 per month bike subsidy |
| <input type="checkbox"/> Subsidy for transit/vanpool | <input type="checkbox"/> Access to carsharing services |
| <input type="checkbox"/> Pre-tax deduction for parking | <input type="checkbox"/> Access to bike share services |
| <input type="checkbox"/> Free or subsidized parking | <input type="checkbox"/> None |
| <input type="checkbox"/> Cash equivalent instead of parking spaces (parking cash-out) | |

Employer name (optional)

Industry of your employer: *

- | | |
|--|------------------------------------|
| Arts and Entertainment | Manufacturing |
| Agriculture, Forestry, Fishing and Hunting | Mining |
| Construction | Other Services |
| Educational Services | Professional and Business Services |
| Federal Government | Retail Trade |
| Financial Activities | State and Local Government |
| Health Care and Social Assistance | Transportation and Warehousing |
| Information | Utilities |
| Leisure and hospitality | Wholesale Trade |

Are you: *

- Female Male Other/Decline to state

Which age bracket are you in?*

-
-

Which family income bracket are you in? *

-
-

What is your employment status? *

-

Do you have a disability that impacts you getting into or around San Francisco? *

- Yes No

Where did you hear about this survey? *

- Via email SF Environment website Postcard Twitter Facebook

How do you usually get information about local news and events relevant to you? *

- | | |
|--|---|
| <input type="checkbox"/> Printed newspaper | <input type="checkbox"/> Facebook |
| <input type="checkbox"/> Online news media/blogs | <input type="checkbox"/> Instagram |
| <input type="checkbox"/> E-newsletters/listservs | <input type="checkbox"/> Via my employer |
| <input type="checkbox"/> Twitter | <input type="checkbox"/> Other (please explain below) |

Additional Information

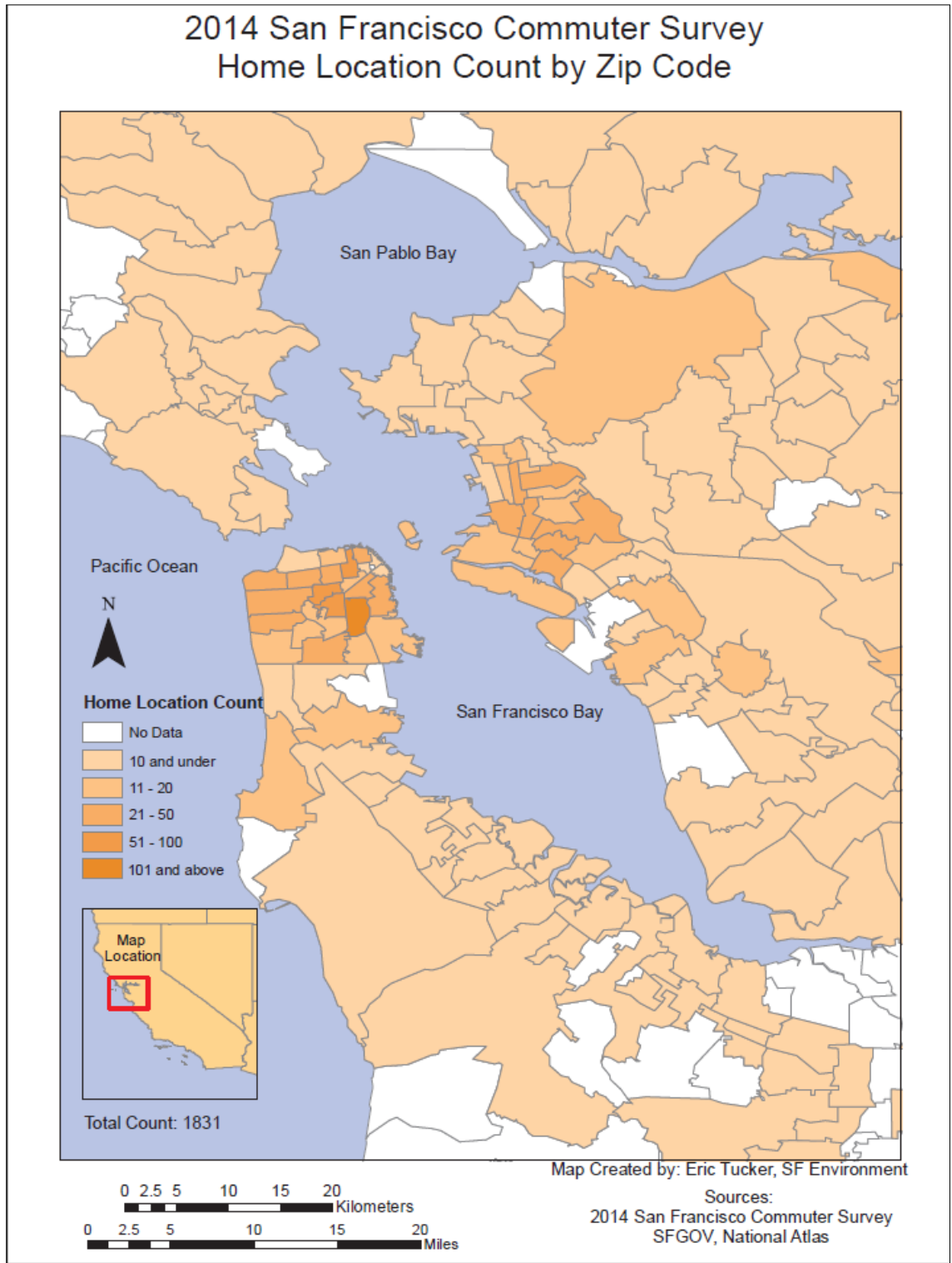
If you would like to receive additional information, please check the topics you are interested in and fill in your email. I would like more information about:

- Rideshare Matching**
Get help finding partners for carpool/vanpool
- Commute by Bike program**
Free, on-site bicycle education classes and technical assistance with bike parking for participating businesses
- Tenant Bicycle Parking in Existing Commercial Buildings**
Information on your right to safe, secure bicycle parking in your office/building
- Pre-Tax Commuter Benefits Program**
Save up to 40 percent on monthly transit passes (Muni, BART, etc) & vanpool expenses by using pre-tax dollars.
- Bicycle Commuter Benefit**
Your employer can reimburse bicycle commuters up to \$20 per month tax free
- Bay Area Bike Share**
Providing the "last mile" connection between public transit and the office, as well as an easy way to zip around town
- Emergency Ride Home Program**
You can get reimbursed for taxi fare home in case of a personal emergency if you commuted sustainably to work
- Clean Transportation email list**
Join our quarterly mailing and receive tips on discounts and new programs
- Electric vehicles**
Information on workplace charging, EV carpooling, and other EV programs

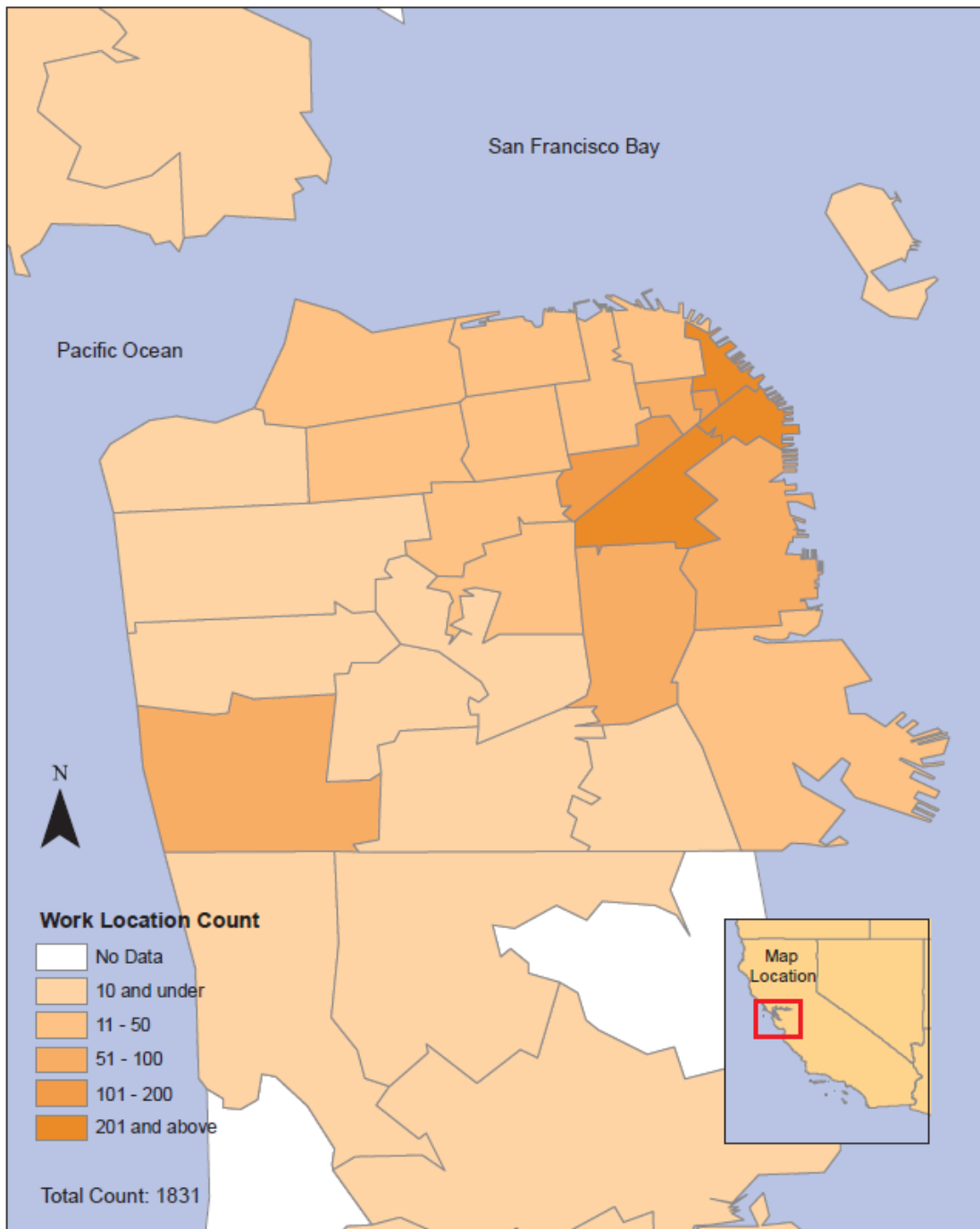
Email: required if you requested further information

APPENDIX B: 2014 TRANSPORTATION SURVEY RESULTS BY QUESTION

What is your home and work zip code?



2014 San Francisco Commuter Survey Work Location Count by Zip Code



Map Created by: Eric Tucker, SF Environment

Sources:
2014 San Francisco Commuter Survey
SFGOV, National Atlas



What is the distance one-way from home to your usual place of work?

One-way Commute Distance	Percentage
<2 miles	15
3-5 miles	21
6-10 miles	13
11-20 miles	20
>21 miles	30

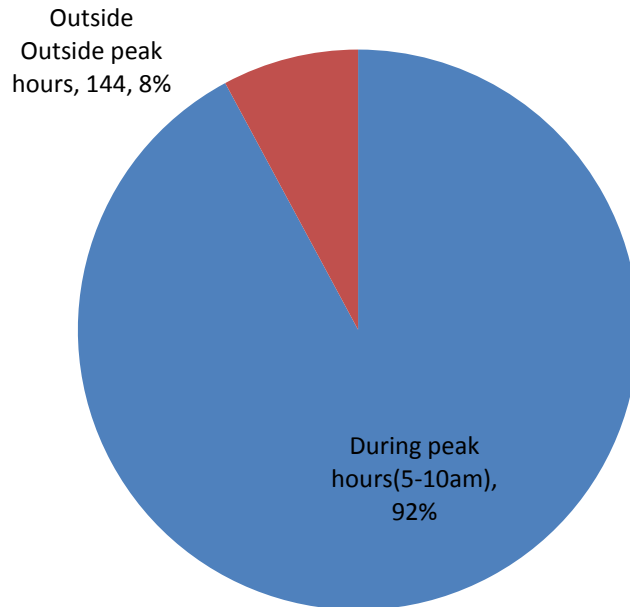
n=1831

How many minutes does your one-way commute typically take?

One-way Commute Time	Percentage
0-10 minutes	5
11-30 minutes	32
31-60 minutes	42
61+ minutes	21

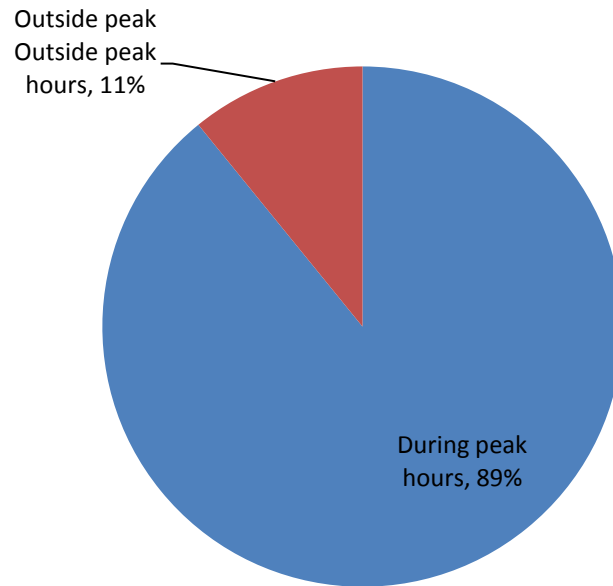
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What time do you typically start work?



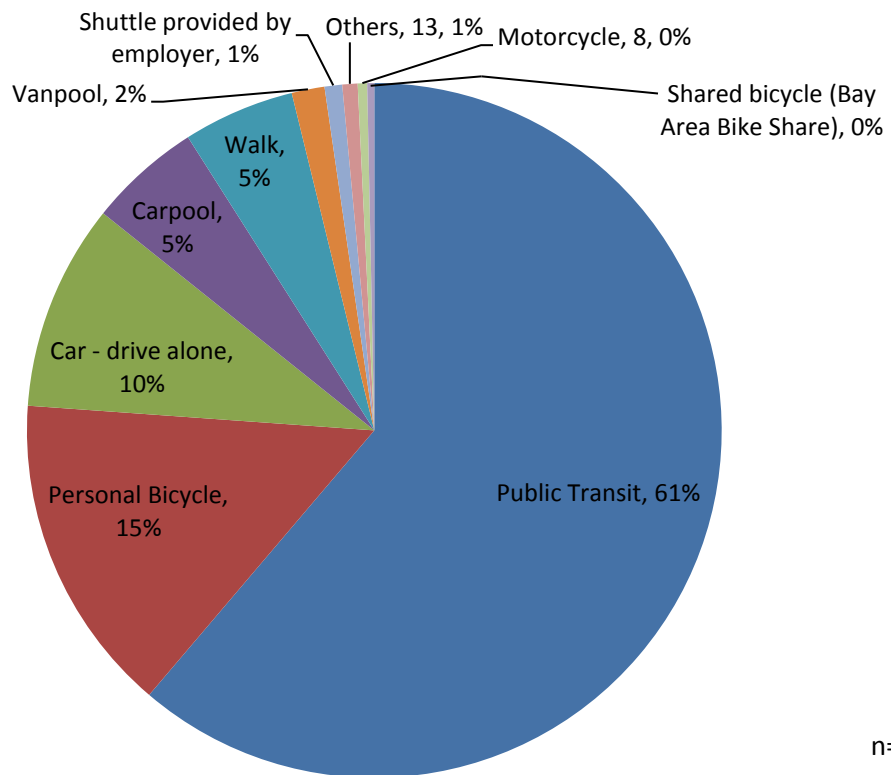
n=1831

What time do you typically finish work?



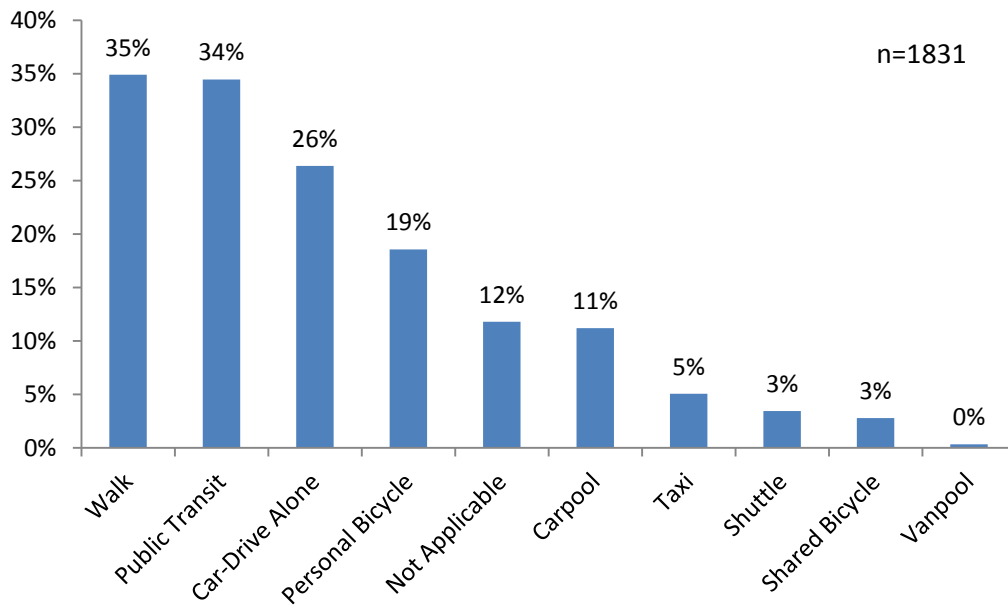
n=1831

How do you usually get to and from work? Select the main mode only.



n=1831

What other forms of transportation do you use for your commute? (choose all that apply)



Please select your primary reason for choosing to drive alone.

Reason	Percentage
Driving is quicker/more convenient	32
No transit service near my home or work	20
Irregular hours or work late	10
Need to make stops on the way to/from work	9
Need my car to do my job	6
Difficult to find a carpool partner	5
Drive to a transit station	5
Driving is cheaper	5
Parking is provided at my workplace	2
Want my car available in the event of a personal emergency	2
Safety	2
Health issues limit my transportation choices	1
Need to run errands during breaks	1

n=176

Please select your secondary reason for choosing to drive alone.

Reason	Percentage
Driving is quicker/More convenient	22
Irregular hours or work late	17
No other reason	13
Need to make stops on the way to/from work	9
No transit service near my home	7
Want my car available in the event of a personal emergency	6
Need my car to do my job	5
Difficult to find a carpool partner	4
Parking is provided at my workplace	4
Need to run errands during break	3
Safety	3
Drive to a transit station	3
Driving is cheaper	3
Health issues limit my transportation choices	0

n=176

Would you be willing to try any of the following ways of getting to work occasionally or on a regular basis? Check all that apply.

Mode	Percentage
Public Transit	36
Carpool	24
Bicycle	17
Vanpool	12
Not Willing	7
Walk	4

n=302

Which of the following would encourage you to use public transit? Choose your top 3.

Incentive	Percentage
Financial incentives	28
Shuttle from transit stop to workplace	23
Free ride home in emergency	14
Flexible work schedule	13
Availability of WiFi on transit	11
Access to Carshare for personal errands	7
Access to Bikeshare	5

n=254

Which of the following would encourage you to cycle or walk? Choose your top 3.

Incentive	Percentage
Shower	20
Secure bike parking	18
Financial	16
Flexible work schedule	12
Training	9
Company (group of people to walk/cycle with)	8
Emergency ride home	7
Bikeshare	5
Carshare	5

n=148

Which of the following would encourage you to carpool or vanpool? Choose your top 3.

Incentive	Percentage
Help in finding suitable people to share the ride	28
Financial incentives such as pre-tax deductions/subsidy	18
Flexibility to carpool/vanpool only occasionally	17
Flexible work schedule	13
Free ride home in case of a personal emergency	12
Reserved parking for carpool/vanpool	8
Access to carshare/bikeshare	4

n=206

Please describe why you choose to take transit. Select all that apply.

Reason	Percentage
Transit more convenient	15
More environmentally friendly	15
Ability to relax/multitask	14
Transit is cheaper than driving	14
Parking is not available/too expensive	13
Transit is faster	10
Pre-tax deductions available for transit	7
Car is not available	7
Other	3
Don't have driver's license	1
Access to carshare/bikeshare	1

n=5501

Which transit systems do you use to get to and from work? Check all that apply.

Type	Percentage
BART	40
Muni	33
AC Transit	1
Caltrain	6
Others	5
Ferry	3
Golden Gate Transit	2

n=2243

Which type of carpool or vanpool do you use?

Type	Percentage
Carpool organized with family/friends	35
Casual carpool	35
Carpool organized with coworkers	18
Vanpool organized through 511.org	8
Carpool organized through 511.org Ridematch service	3
Vanpool organized by employer	2

n=313

Why do you choose to carpool/vanpool?

Reason	Percentage
Saves money	26
Saves time	20
Reduces traffic congestion/improves air quality	17
More flexible than other options	14
Transit too crowded/unreliable/infrequent	10
Don't want to find parking for my own car	7
Other	5
Dedicated parking at work for carpools	1
Access to carsharing/bikesharing service	1

n=768

Why do you choose to cycle to work?

Reason	Percentage
Exercise/health benefits	18
Quickest option	17
Saves money	15
More flexible than other options	14
Reduces traffic congestion/improves air quality	13
Secure bike parking available at my workplace	12
Transit too unreliable/infrequent	11
Receive \$20 per month bike subsidy	1

n= 279

Do you change how you get to work seasonally?

Response	Percentage of Bikers
Yes	27
No	73

n=586

My seasonal change is...

Of those who changed their commute seasonally, the majority rode less in winter due to weather conditions and it being more likely to be dark during their commute.

Where do you park your bike?

Location	Percentage
Transit Station	1
At/near workplace	99

n=271

Is there secure bike parking at or near your workplace?

Response	Percentage
Yes	70
No	30

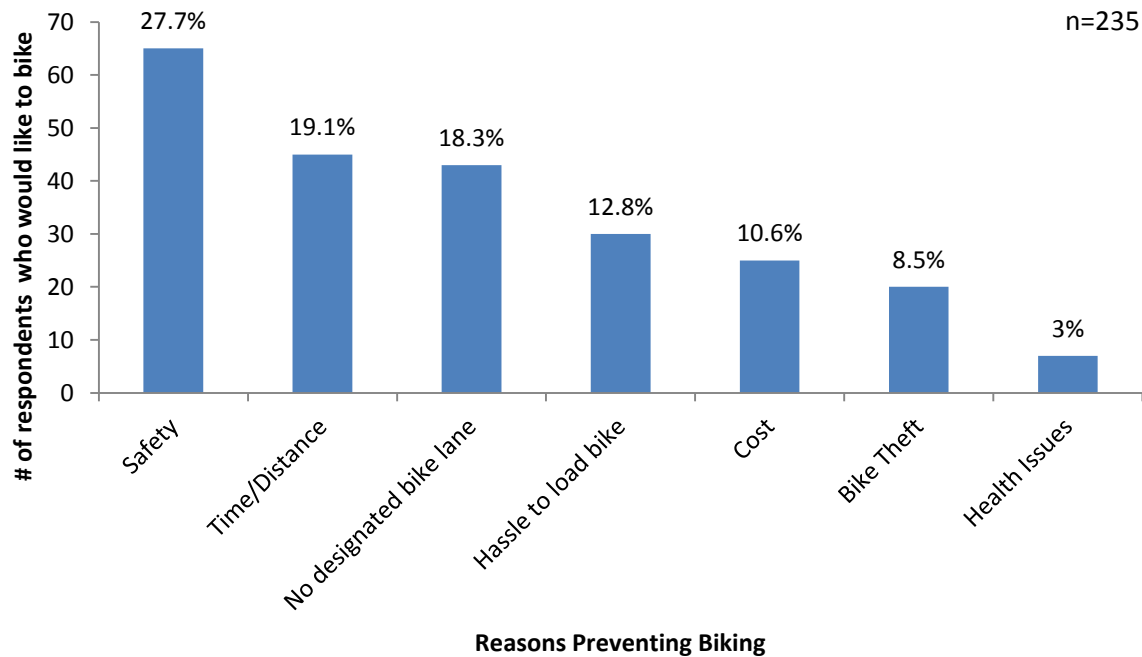
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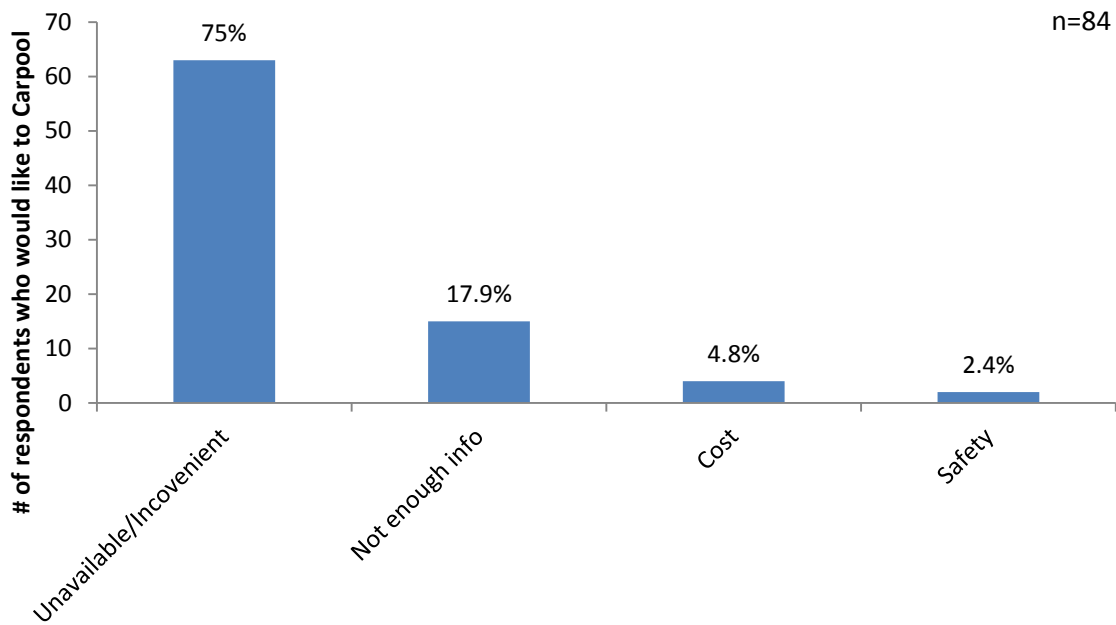
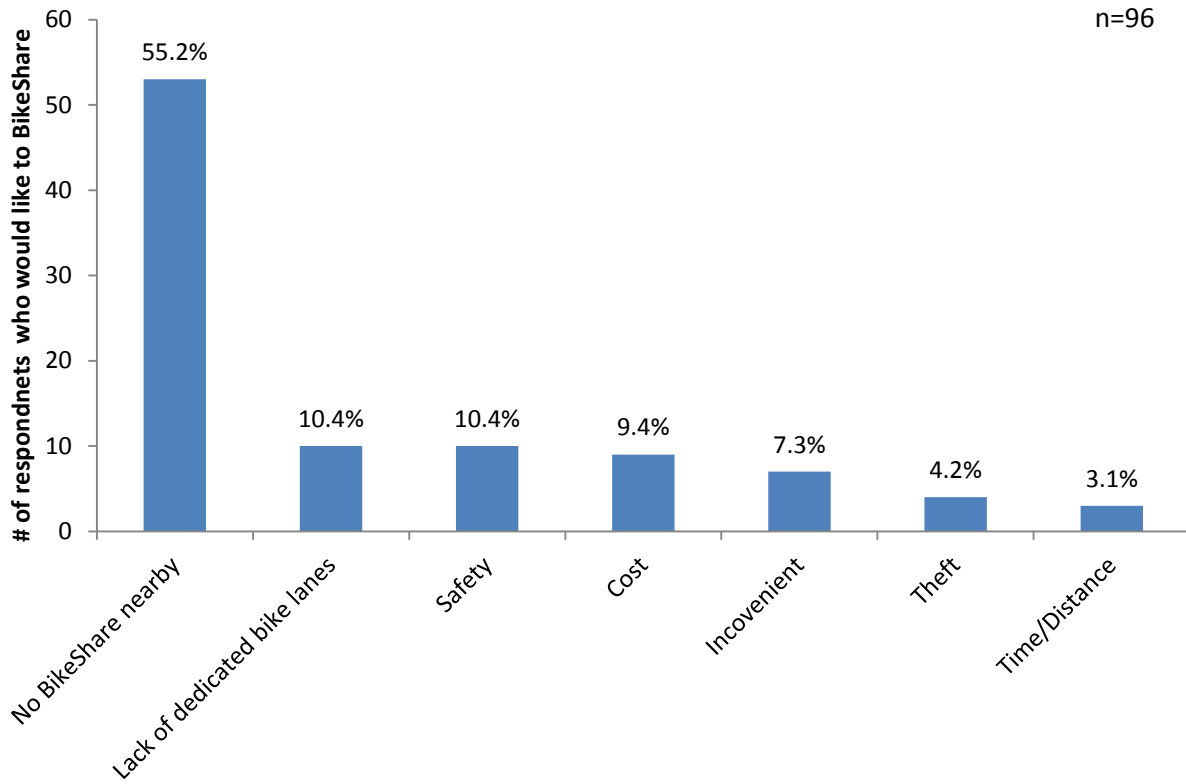
If you would prefer to be using another form of transportation for part or all of your commute, what is it?

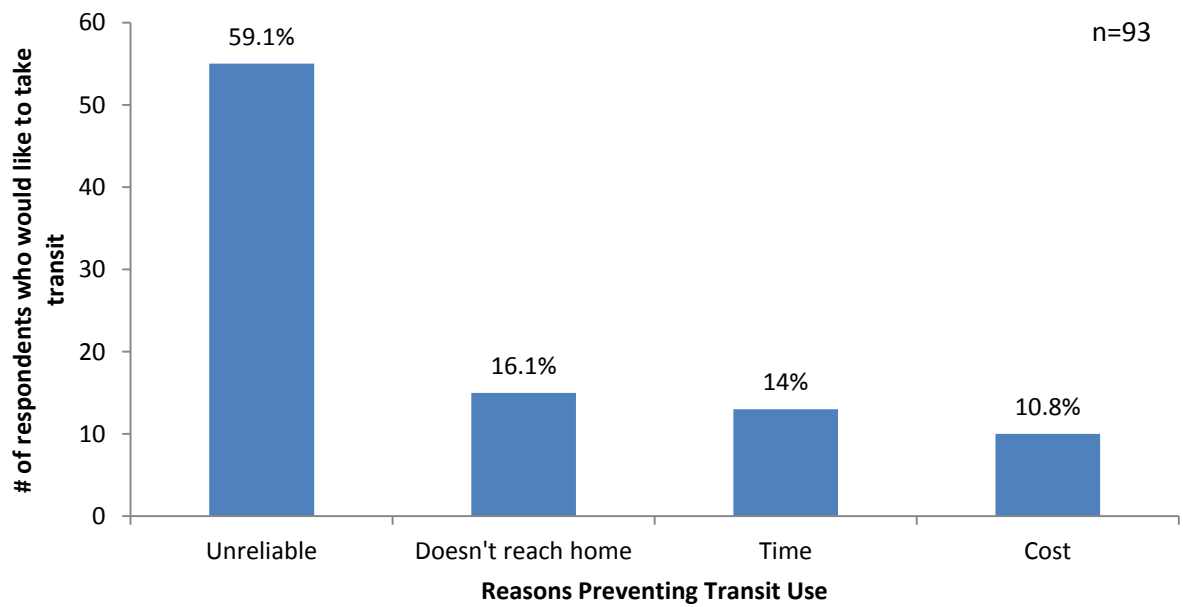
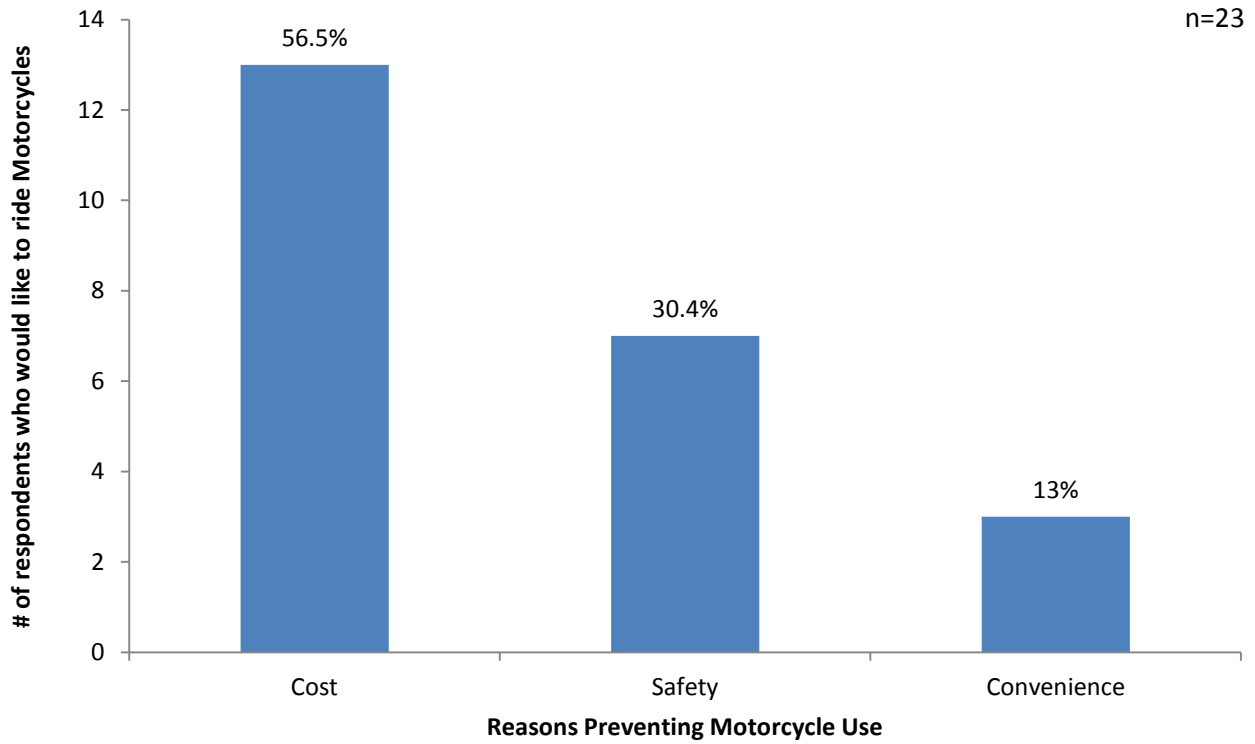
Preference	Percentage
No changes needed	51
Personal bicycle	14
Carpool	9
Public transit	8
Walk	6
Shared bicycle (Bay Area Bikeshare)	5
Vanpool	3
Motorcycle	2
Taxi	1

n=1924

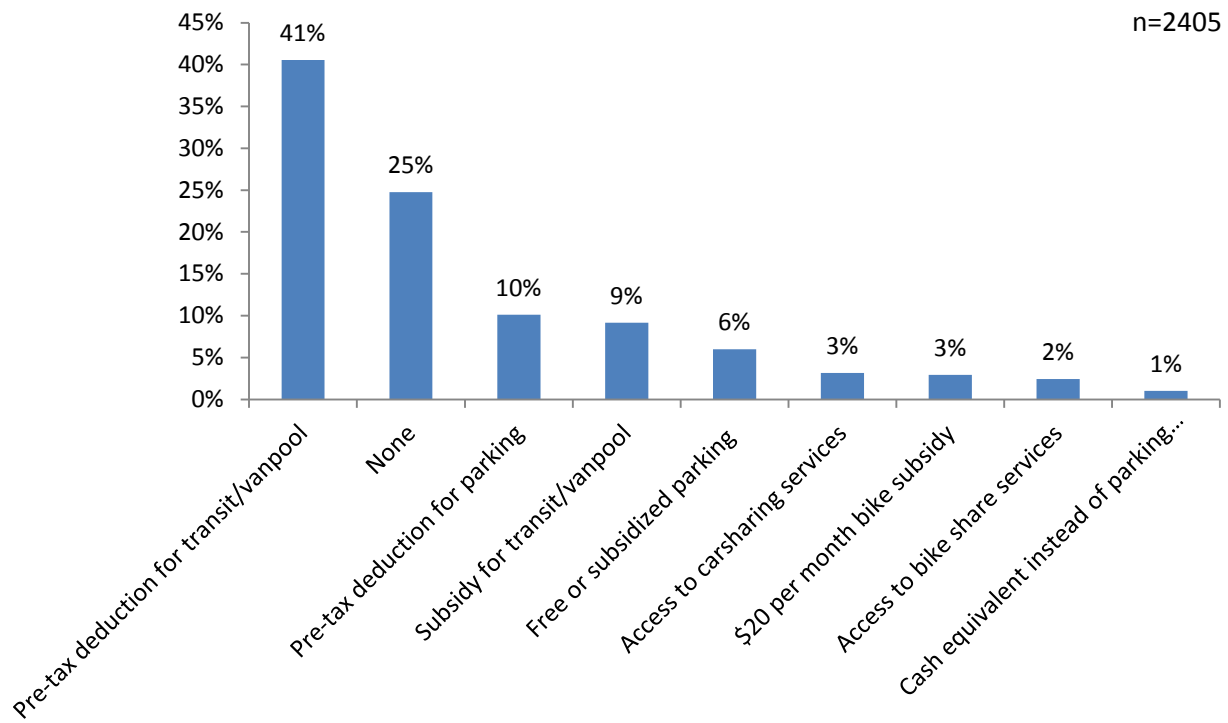
Please describe what is preventing you from using your preferred form of transportation to work.





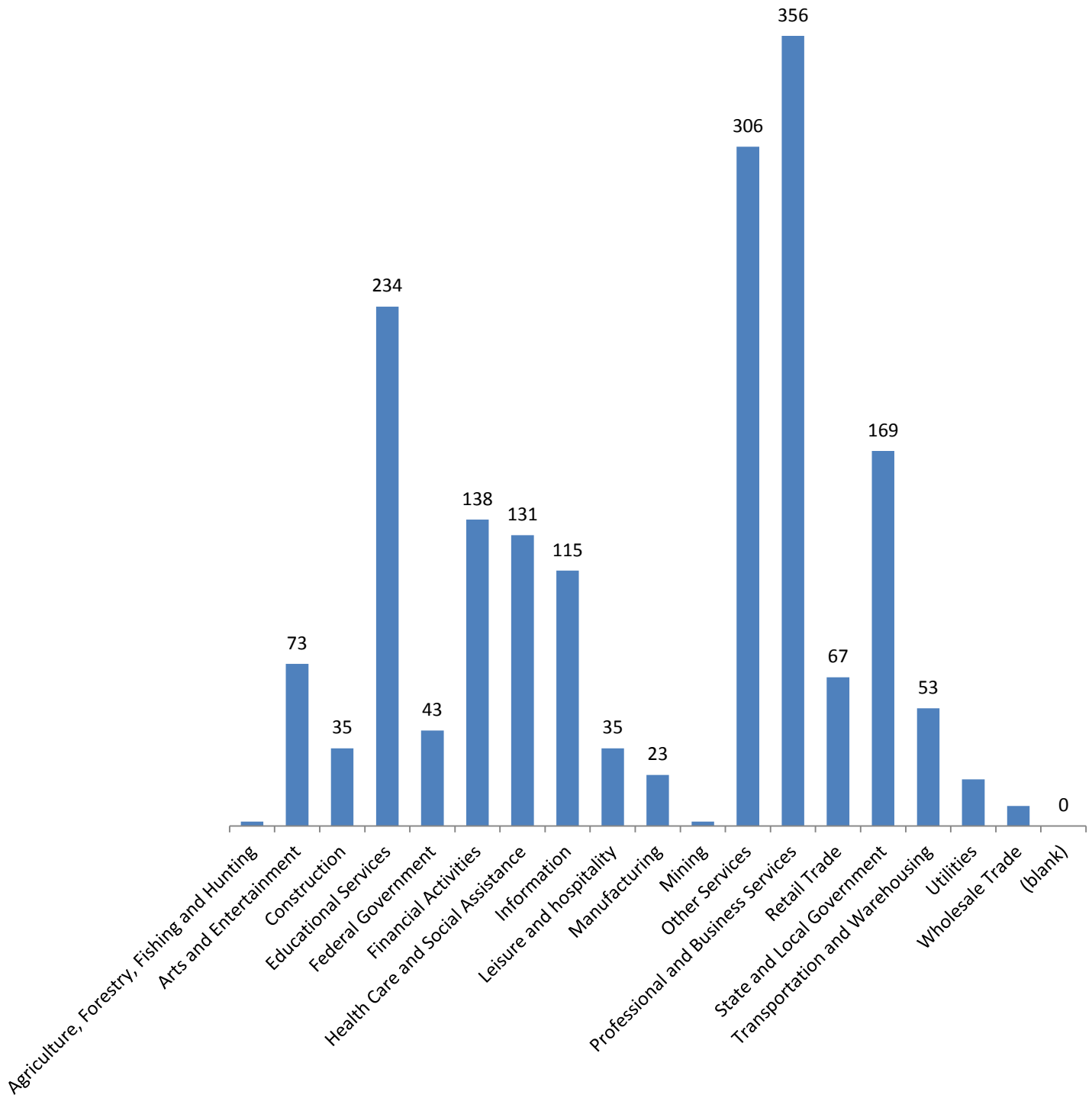


Does your company currently offer any benefits/incentives related to commuting?
Please check all that apply.

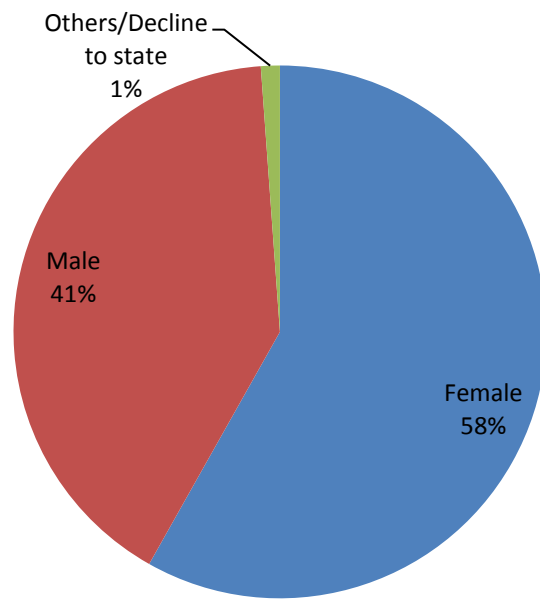


Industry of your employer:

n=1,831

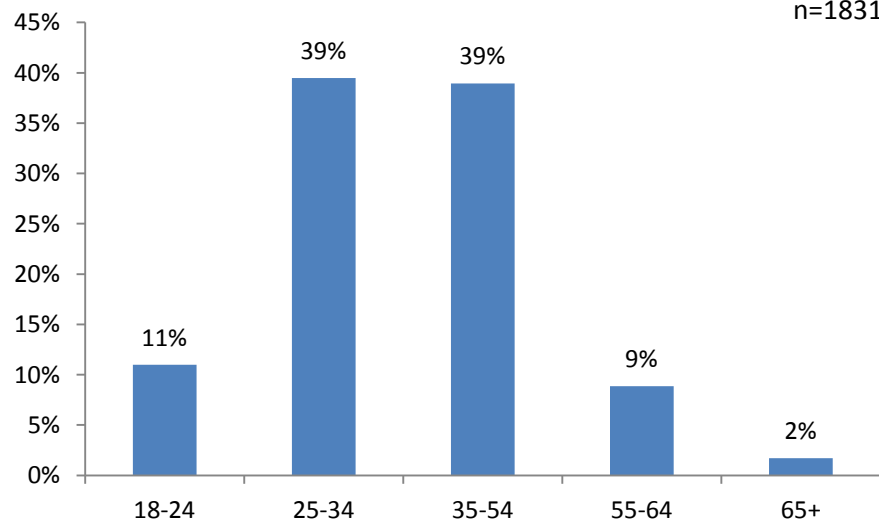


Gender



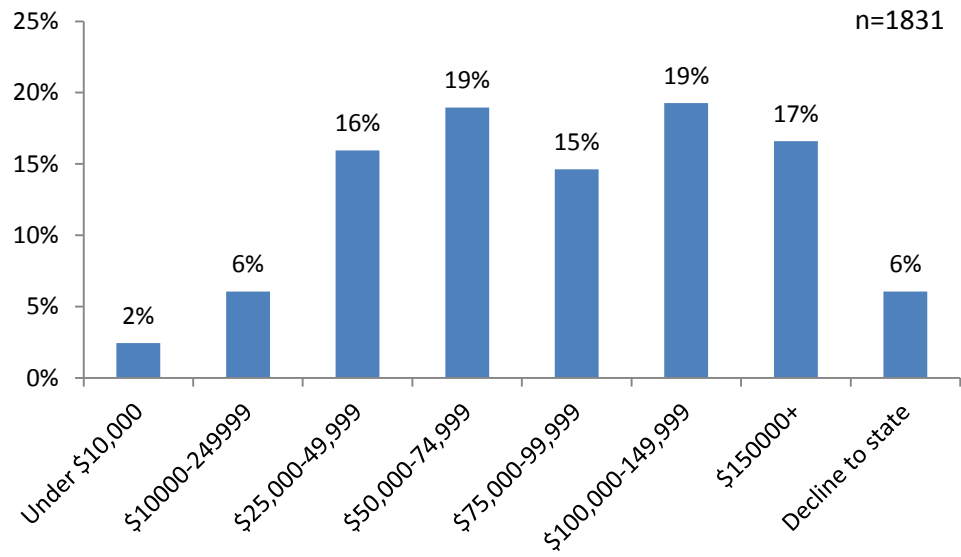
n=183

Which age bracket are you in?

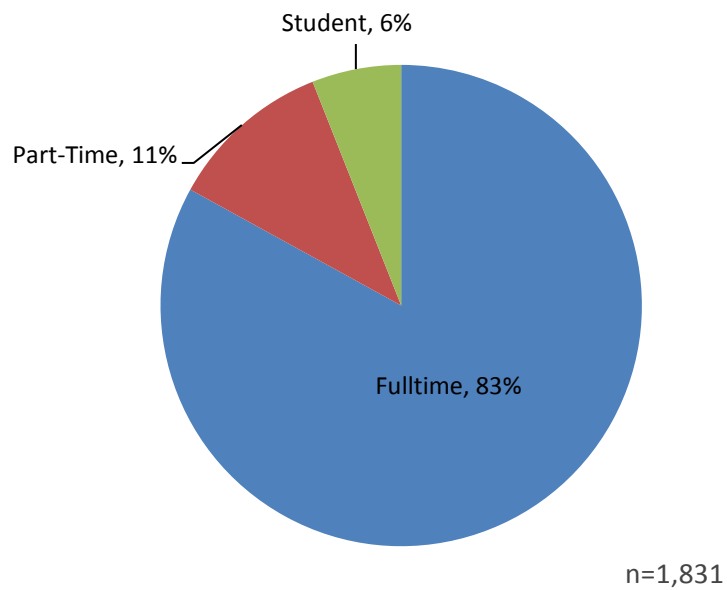


n=1831

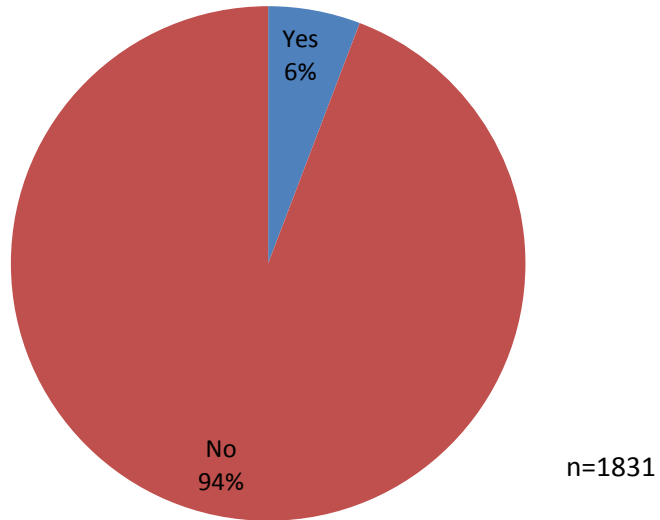
Which family income bracket are you in?



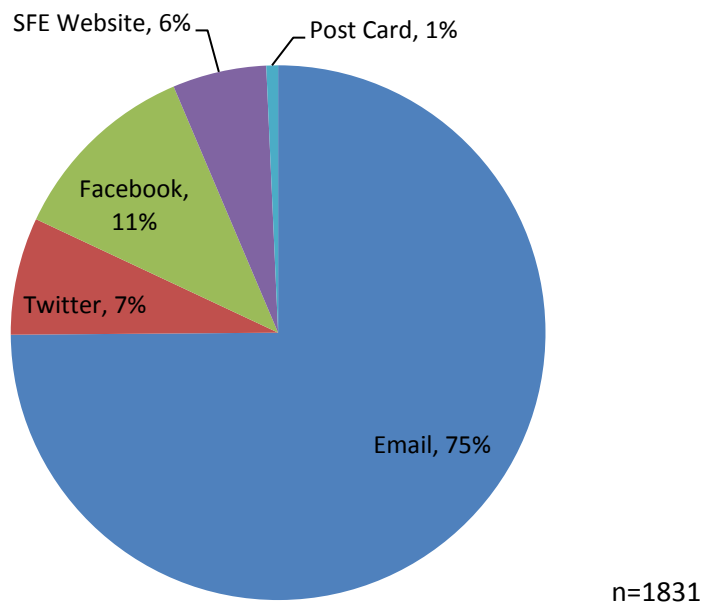
What is your employment status?



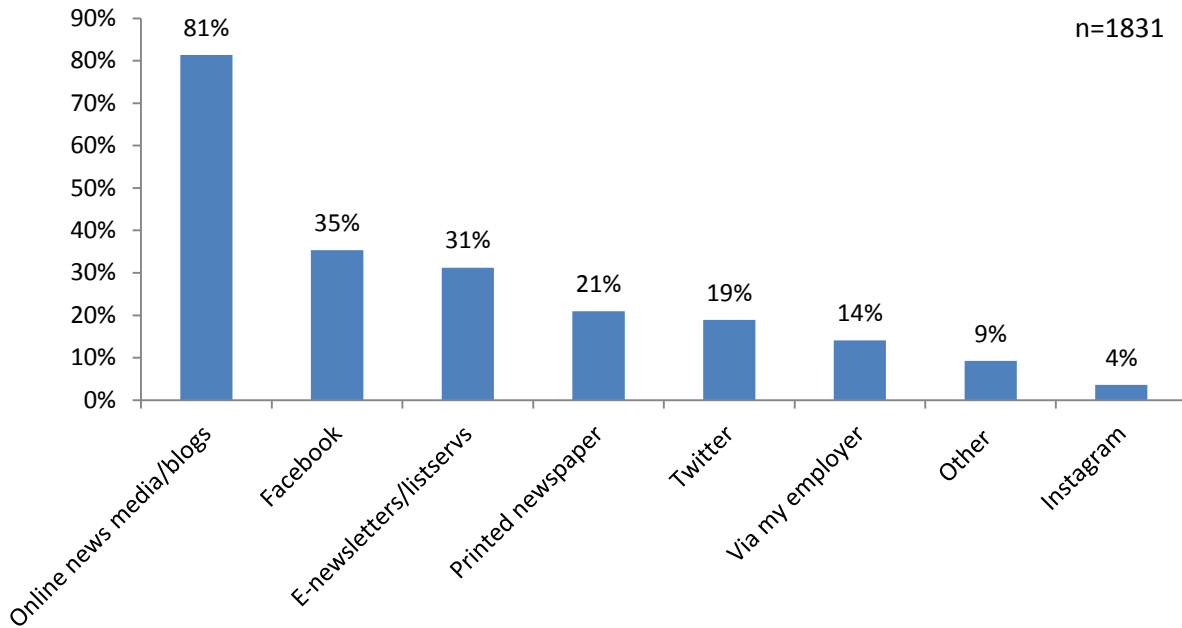
Do you have a disability that impacts you getting into or around San Francisco?



Where did you hear about this survey?

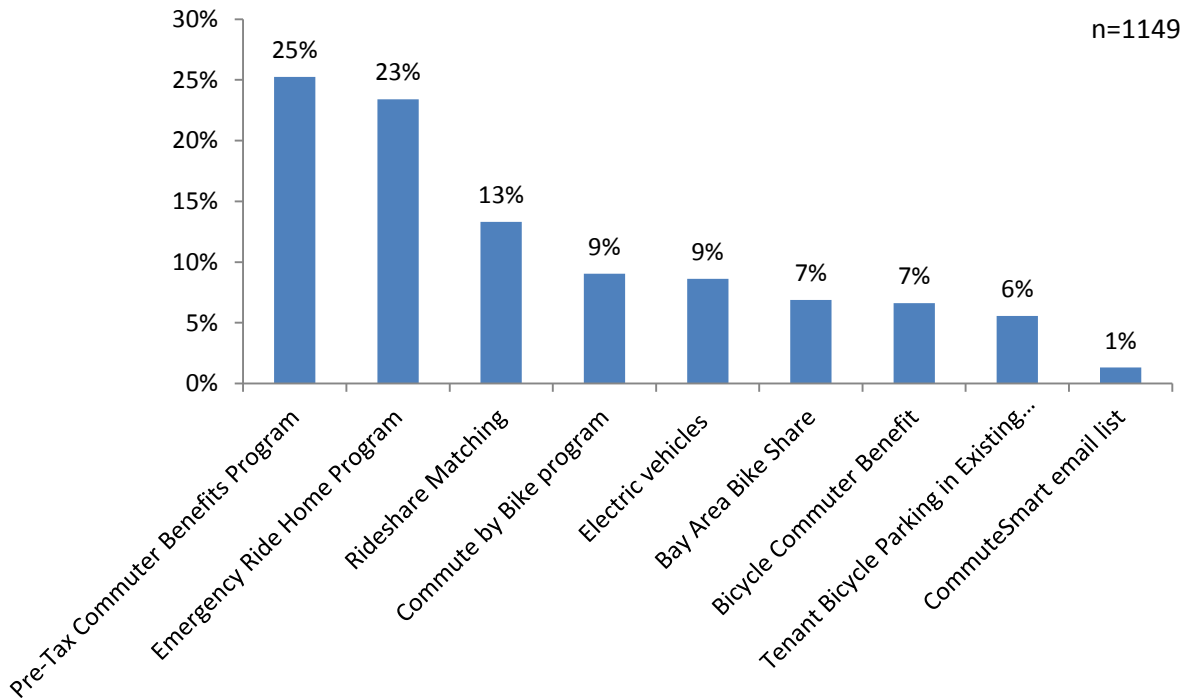


How do you usually get information about local news and events relevant to you?



Request for additional Information

If you would like to receive additional information, please check the topics you are interested in and fill in your email.



APPENDIX C: PRIMARY COMMUTE MODE BY DEMOGRAPHIC INFORMATION

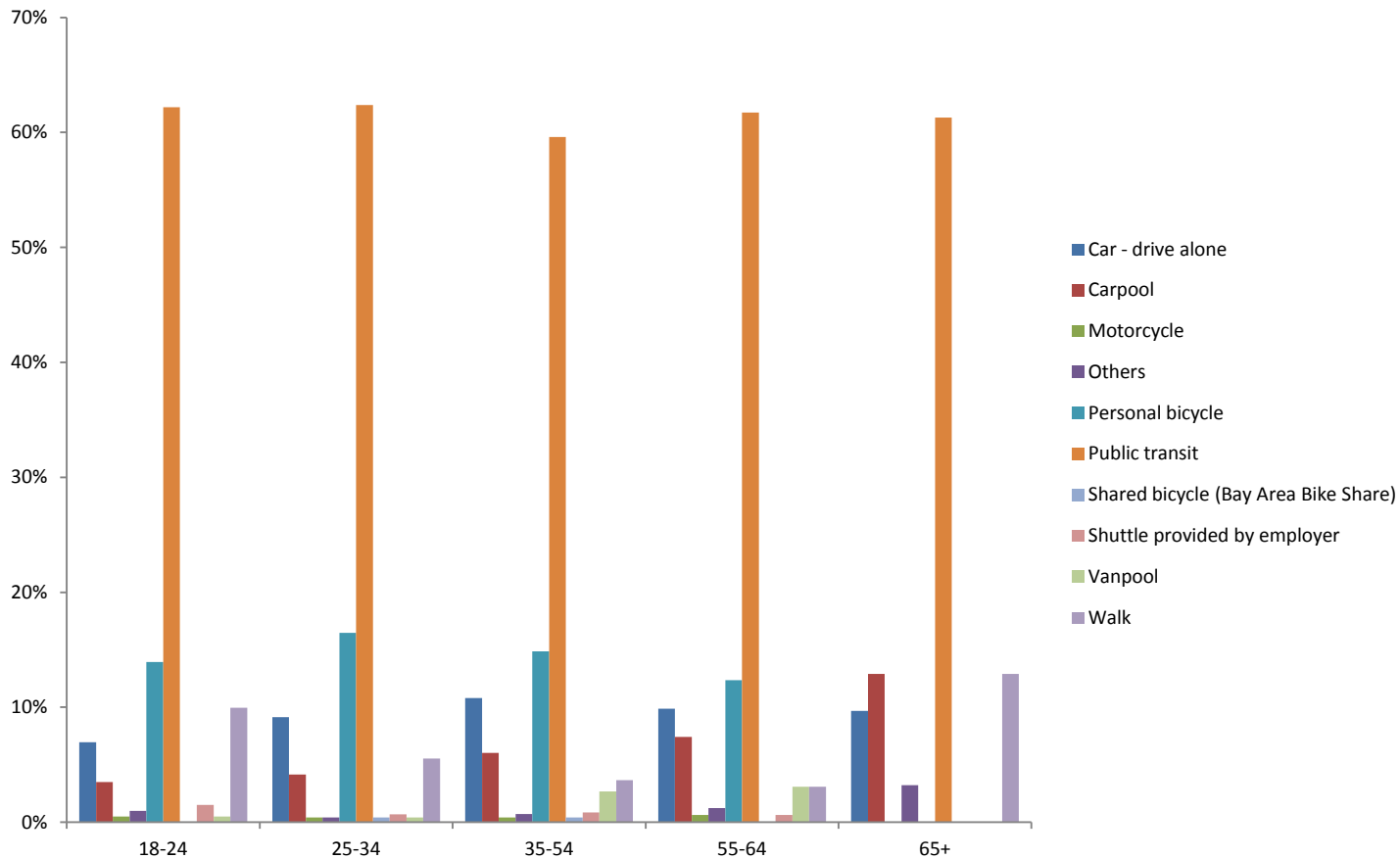


Figure C1: Age and Primary Commute Mode

n=1831

The majority of respondents across all age groups chose public transit as their primary mode of commute. The secondary choice of respondents 64 yrs old or less was biking on their personal bikes. Respondents 65 yrs or older was evenly split between carpooling and walking.

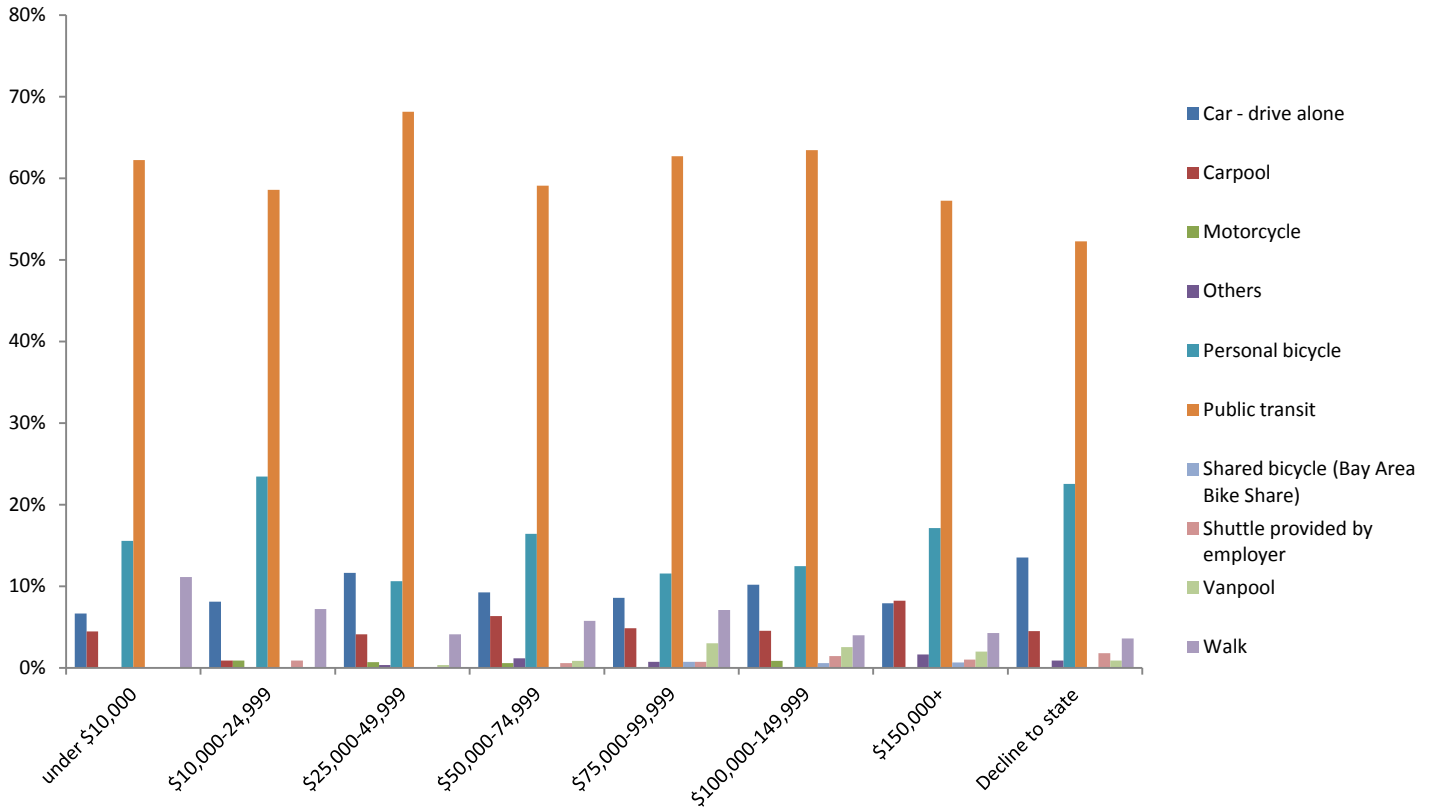


Figure C2: Household Income and Primary Commute Mode

n=1831

Respondents regardless of income overwhelmingly chose transit as their primary commute mode. The second most popular form of commute across all income brackets was use of personal bikes.

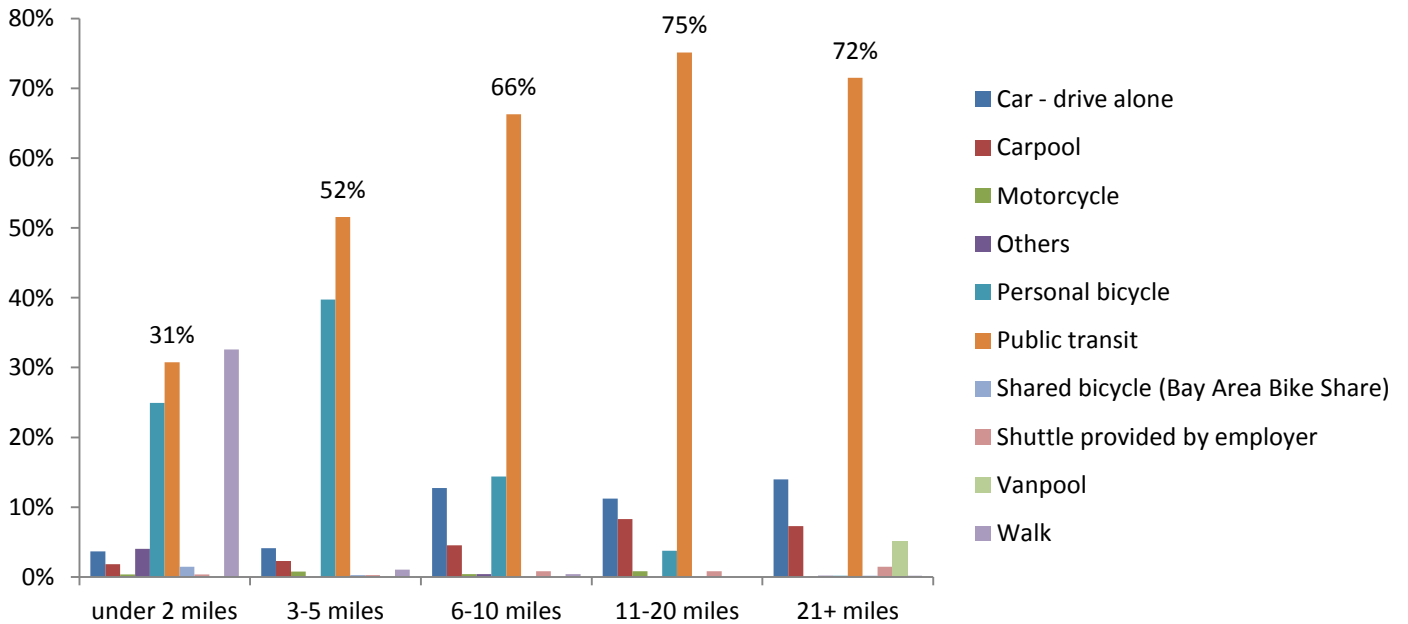


Figure C3: Commute Distance and Primary Commute Mode

n=1831

Regardless of commute distance from home to work, the majority prefer to take public transit. There is a linear increase between longer distances and preference for transit use that is unmatched by any other form of commute. The exception would be an inclination for walking distances less than two miles, and for distances less than five miles, biking was also a popular option.

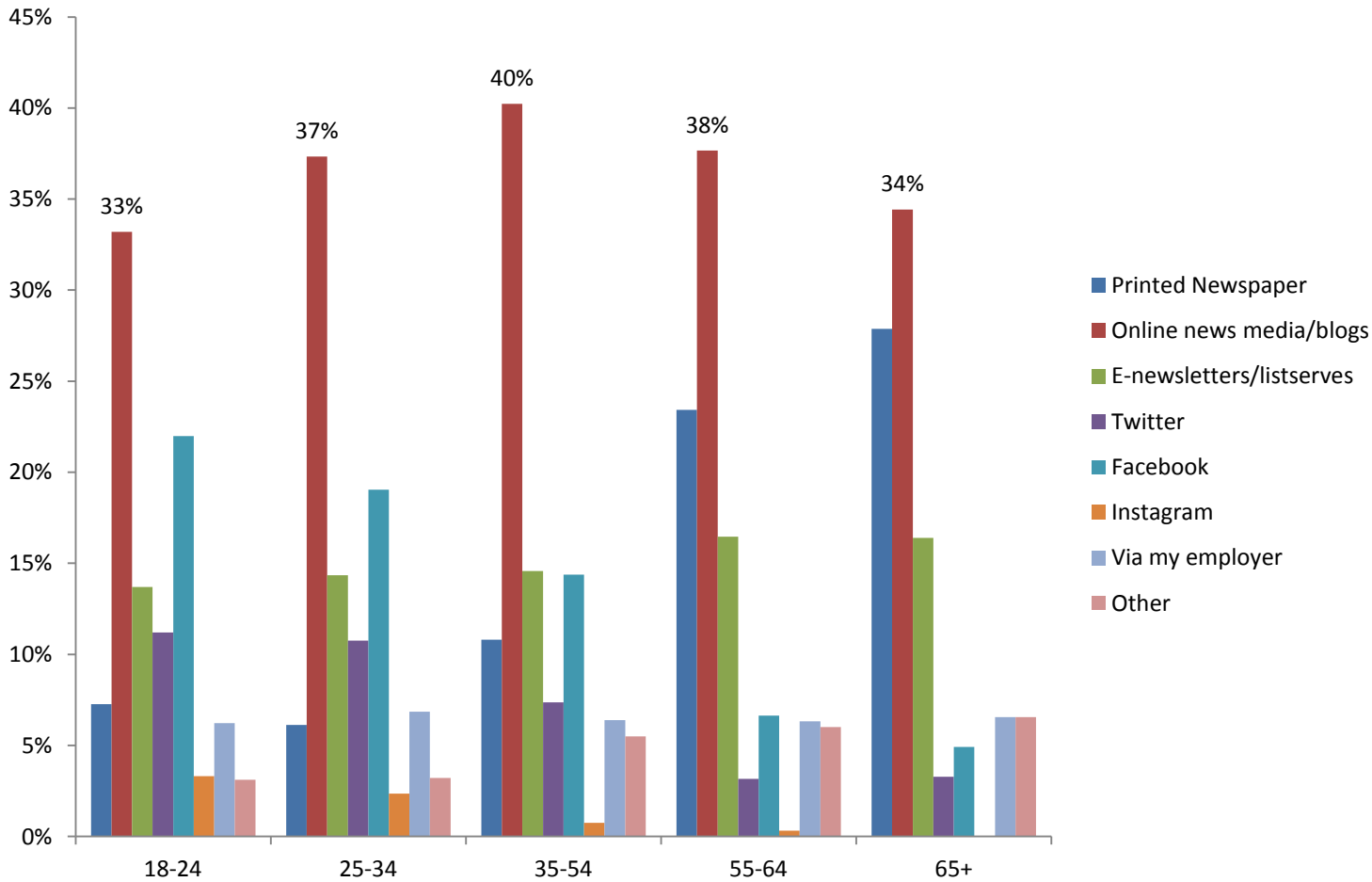


Figure C4: Age and Source of News Information

n=1831

A staggering number of respondents, regardless of age, chose online news media/blogs as their primary source of information. Those under the age of 54 enjoy staying updated through social media like Facebook, and respondents over the age of 55 prefer to receive information from printed newspapers in addition to online news media.