Methodology

- 1,173 surveys conducted with employees at businesses located within an area of Downtown Palo Alto bound by El Camino Real, Webster Street, Everett Avenue, and Forest Avenue.

- The survey participation rate was 44%, which represents the total number of completed surveys compared to the total number of employees at participating businesses. The overall response rate was 12%, which represents the total number of completed surveys compared to the total number of employees in Downtown Palo Alto.

- A stratified random sample of worksites was pulled by worksite size, including small, medium and large businesses. Sampled worksites were contacted directly to identify and recruit an onsite survey coordinator who distributed the surveys to all employees at their respective worksites.

- The survey was offered in online and paper formats for employees of businesses with 5 or more employees, and was conducted by telephone with employees of businesses with 4 or fewer employees.

- Data collection began May 4th and ended the week of May 25th. Each respondent was asked commute mode questions for one calendar week previous to the date on which they took the survey.
Downtown Palo Alto

For this study, Downtown Palo Alto was defined as the area bound by El Camino Real, Webster Street, Everett Avenue, and Forest Avenue.
Survey respondents were categorized into home regions based on zip code data; more than half of downtown employees live in the South Bay region and Palo Alto.

<table>
<thead>
<tr>
<th>Region</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>San Francisco</td>
<td>10%</td>
</tr>
<tr>
<td>Peninsula</td>
<td>20%</td>
</tr>
<tr>
<td>South Bay</td>
<td>33%</td>
</tr>
<tr>
<td>Palo Alto</td>
<td>22%</td>
</tr>
<tr>
<td>East Bay</td>
<td>7%</td>
</tr>
<tr>
<td>Else</td>
<td>8%</td>
</tr>
</tbody>
</table>
The survey sample was stratified and the data weighted to reflect the distribution of businesses by worksite size.

<table>
<thead>
<tr>
<th>Business Size (Survey Sample)</th>
<th>% of survey sample (weighted)</th>
<th>Business Size (City Registry)</th>
<th>% of total employees (based on self-reported average employees per worksite)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 to 25 employees</td>
<td>24%</td>
<td>1 to 25 employees</td>
<td>24%</td>
</tr>
<tr>
<td>26 to 100 employees</td>
<td>32%</td>
<td>26 to 100 employees</td>
<td>32%</td>
</tr>
<tr>
<td>101+ employees</td>
<td>44%</td>
<td>101+ employees</td>
<td>44%</td>
</tr>
</tbody>
</table>
Modes of Transportation
More than half (55%) of the trips taken into downtown are single-occupant-vehicle trips.

%’s reflect the total amount of trips taken during the week

- Drove alone: 55%
- Caltrain: 17%
- Walked: 8%
- Rode a bicycle: 7%
- Carpooled: 5%
- Worked remotely: 5%
- Other: 3%

SOV Total: 55%  
Includes drive alone and motorcycle

Transit Total: 19%  
Includes bus and rail

Non-motorized Total: 15%  
Includes walking and riding a bicycle

Q1. Thinking back to last week, what mode of transportation did you use to commute TO downtown Palo Alto?
Mode Share by Worksite Size

As business size decreases, the percentage of SOV trips increases.

Drove alone  Caltrain  Walk/Bike  Carpoled  Worked remotely/Other

<table>
<thead>
<tr>
<th>Business Size by Number of Employees</th>
<th>1-25 emp. (24%)</th>
<th>26-100 emp. (32%)</th>
<th>101+ emp. (44%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Drove alone</td>
<td>74%</td>
<td>61%</td>
<td>41%</td>
</tr>
<tr>
<td>Caltrain</td>
<td>7%</td>
<td>12%</td>
<td>25%</td>
</tr>
<tr>
<td>Walk/Bike</td>
<td>5%</td>
<td>6%</td>
<td>4%</td>
</tr>
<tr>
<td>Carpoled</td>
<td>8%</td>
<td>8%</td>
<td>7%</td>
</tr>
<tr>
<td>Worked remotely/Other</td>
<td>7%</td>
<td>5%</td>
<td>7%</td>
</tr>
</tbody>
</table>

Business Size by Number of Employees

Numbers in parentheses represent the percentage of the sample for each respective subgroup.

Q1. Thinking back to last week, what mode of transportation did you use to commute TO downtown Palo Alto?
As the distance from Downtown increases, mode shifts toward transit.

Q1. Thinking back to last week, what mode of transportation did you use to commute TO downtown Palo Alto?
Commuters from San Francisco are the least likely to drive.

<table>
<thead>
<tr>
<th>Mode of Transportation</th>
<th>San Francisco (10%)</th>
<th>Peninsula (20%)</th>
<th>South Bay (33%)</th>
<th>Palo Alto (22%)</th>
<th>East Bay (7%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Drove alone</td>
<td>70%</td>
<td>63%</td>
<td>65%</td>
<td>48%</td>
<td>3%</td>
</tr>
<tr>
<td>Caltrain</td>
<td>18%</td>
<td>16%</td>
<td>3%</td>
<td>1%</td>
<td>3%</td>
</tr>
<tr>
<td>Walk/Bike</td>
<td>1%</td>
<td>12%</td>
<td>7%</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>Carpoolled</td>
<td>3%</td>
<td>7%</td>
<td>6%</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>Worked Remotely/Other</td>
<td>1%</td>
<td>6%</td>
<td>12%</td>
<td>5%</td>
<td>12%</td>
</tr>
</tbody>
</table>

Numbers in parentheses represent the percentage of the sample for each respective subgroup. Refused to report=8%

Q1. Thinking back to last week, what mode of transportation did you use to commute TO downtown Palo Alto?
Mode Share by Age and Parental Status

Older commuters and Parents are more likely to drive alone to work.

Drove alone | Caltrain | Walk/Bike | Carpoold | Worked Remotely/Other
--- | --- | --- | --- | ---
70% | 51% | 20% | 18% | 9% | 9% | 7% | 7% | 5% | 5%

18-49 (66%) | 50+ (19%) | Parent (28%) | Non Parent (68%)
--- | --- | --- | ---
51% | 20% | 11% | 20%
18% | 19% | 8% | 19%
5% | 4% | 7% | 7%
7% | 7% | 8% | 7%
9% | 9% | 8% | 8%

Refused to report=15%
Numbers in parentheses represent the percentage of the sample for each respective subgroup.

Q1. Thinking back to last week, what mode of transportation did you use to commute TO downtown Palo Alto?
Commuters with flexible schedules are less likely to drive.

Q1. Thinking back to last week, what mode of transportation did you use to commute TO downtown Palo Alto?
Part-time employees are more likely to drive.

Q1. Thinking back to last week, what mode of transportation did you use to commute TO downtown Palo Alto?
Mode Share by Business Type

Employees in Retail, Restaurant, and Hospitality companies are more likely to drive.

Q1. Thinking back to last week, what mode of transportation did you use to commute TO downtown Palo Alto?

Numbers in parentheses represent the percentage of the sample for each respective subgroup.
Respondents who live in the East Bay, are employed part time, and work at a small company and retail company are more likely to drive alone.

**Percentage of SOV trips by employee demographics**

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retail East Bay</td>
<td>78%</td>
</tr>
<tr>
<td>One part-time job</td>
<td>76%</td>
</tr>
<tr>
<td>1-25 emp.</td>
<td>75%</td>
</tr>
<tr>
<td>Hospitality</td>
<td>74%</td>
</tr>
<tr>
<td>Restaurant</td>
<td>73%</td>
</tr>
<tr>
<td>Age 50+</td>
<td>72%</td>
</tr>
<tr>
<td>Light office</td>
<td>70%</td>
</tr>
<tr>
<td>Parent</td>
<td>67%</td>
</tr>
<tr>
<td>More than one job</td>
<td>66%</td>
</tr>
<tr>
<td>South Bay</td>
<td>65%</td>
</tr>
<tr>
<td>Start at specific time</td>
<td>64%</td>
</tr>
<tr>
<td>Schedule varies</td>
<td>63%</td>
</tr>
<tr>
<td>Peninsula</td>
<td>63%</td>
</tr>
<tr>
<td>26-100 emp.</td>
<td>61%</td>
</tr>
<tr>
<td>Government</td>
<td>59%</td>
</tr>
<tr>
<td>Overall</td>
<td>55%</td>
</tr>
<tr>
<td>One full-time job</td>
<td>53%</td>
</tr>
<tr>
<td>Age 18-49</td>
<td>51%</td>
</tr>
<tr>
<td>Non Parent</td>
<td>50%</td>
</tr>
<tr>
<td>Schedule is flexible</td>
<td>49%</td>
</tr>
<tr>
<td>101+ emp.</td>
<td>41%</td>
</tr>
<tr>
<td>Palo Alto</td>
<td>41%</td>
</tr>
<tr>
<td>Technology</td>
<td>33%</td>
</tr>
<tr>
<td>San Francisco</td>
<td>18%</td>
</tr>
</tbody>
</table>
Transportation Attitudes
Driving Attitudes

Two-thirds (67%) of drivers say they prefer to drive and plan on continuing to do so.

Among SOV Drivers, 772

I prefer to drive to work and plan on continuing to do so. 67%

I need to drive to work because I make other stops, such as for school, kids, or other errands, before or after work. 60%

I would rather not drive to work, but I have no other good options. 50%

I need to drive to work because I use my car for meetings, deliveries, or other work-related tasks. 44%

I would take a carpool or vanpool to work if it was convenient, safe, and easy to find. 35%

Q10-Q20. Please indicate whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with each of the following statements.
Transit Attitudes

Schedule, frequency, and convenience appear to be slightly larger obstacles to increasing transit ridership than cost.

Among SOV Drivers, 772n

<table>
<thead>
<tr>
<th>Statement</th>
<th>Strongly agree</th>
<th>Somewhat agree</th>
<th>Total Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>I would take transit to work if the service was faster or more frequent.</td>
<td>26%</td>
<td>21%</td>
<td>47%</td>
</tr>
<tr>
<td>I would take transit to work if the schedule was better and it ran when I needed it.</td>
<td>25%</td>
<td>20%</td>
<td>46%</td>
</tr>
<tr>
<td>I would take transit to work if it was easier to get to a transit stop.</td>
<td>24%</td>
<td>19%</td>
<td>43%</td>
</tr>
<tr>
<td>I would take transit to work if it was less expensive or I was given a discounted transit pass.</td>
<td>22%</td>
<td>16%</td>
<td>38%</td>
</tr>
</tbody>
</table>

Q10-Q20. Please indicate whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with each of the following statements.
Agree: Would Rather Not Drive

Drivers who feel they have no other good options believe transit will not fit their schedule or is not convenient for them.

Among the 50% of SOV Drivers who would prefer not to drive but feel they have no other good options.

<table>
<thead>
<tr>
<th>Statement</th>
<th>Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>I would take transit if service was faster/more frequent</td>
<td>63%</td>
</tr>
<tr>
<td>I would take transit if the schedule was better/it ran when I need it</td>
<td>61%</td>
</tr>
<tr>
<td>I would take transit if it was easier to get to a stop</td>
<td>59%</td>
</tr>
<tr>
<td>I would take transit if it was less expensive or I received a discounted pass</td>
<td>47%</td>
</tr>
</tbody>
</table>

Q10-Q20. Please indicate whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with each of the following statements.
Reasons for NOT Taking Transit

Need of a car, personal preference, and lack of convenience are the primary reasons drivers do not take transit more often.

Among SOV Drivers, 772n

- Need car for errands/meetings: 21%
- I prefer to drive: 17%
- Schedule is not convenient: 16%
- Routes not where needed: 12%
- Stops not convenient: 12%
- Take transit as needed: 5%
- Too expensive: 5%
- Unreliable: 4%
- It would take longer: 2%
- Other/Don't know: 6%

21. What is the main reason you do not take transit more often?
Biking and Walking Attitudes

Better routes and better parking/storage options appear to be a factor for some commuters who potentially live close enough to walk or bike to work.

%’s reflect the total amount of trips taken during the week among those who live within a 3 mile radius

<table>
<thead>
<tr>
<th>Mode</th>
<th>% of Trips Taken</th>
</tr>
</thead>
<tbody>
<tr>
<td>Drove alone</td>
<td>43%</td>
</tr>
<tr>
<td>Walked</td>
<td>26%</td>
</tr>
<tr>
<td>Rode a bicycle</td>
<td>19%</td>
</tr>
<tr>
<td>Carpoled</td>
<td>5%</td>
</tr>
<tr>
<td>Worked remotely</td>
<td>3%</td>
</tr>
<tr>
<td>Other</td>
<td>3%</td>
</tr>
<tr>
<td>Caltrain</td>
<td>1%</td>
</tr>
</tbody>
</table>

Among respondents who live within a 3 mile radius of Downtown Palo Alto, 326n

**Q10-Q20. Please indicate whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with each of the following statements.**

<table>
<thead>
<tr>
<th>Statement</th>
<th>Strongly agree</th>
<th>Somewhat agree</th>
<th>Total Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>I would walk or bike to work if there were better paths, trails, and sidewalks.</td>
<td>23%</td>
<td>17%</td>
<td>40%</td>
</tr>
<tr>
<td>I would bike to work if there was better parking or storage options for my bike at my work location.</td>
<td>16%</td>
<td>16%</td>
<td>32%</td>
</tr>
</tbody>
</table>
Parking
More than half of commuters park in public or private garages or lots; fifteen percent park on neighborhood streets.

4. Where do you typically park when you drive to work?
Commuters who park on neighborhood streets are most likely to work for a medium-sized business.

**Business Size by Number of Employees**

- **1-25**: 26%
- **26-100**: 34%
- **101+**: 41%

**Parking by Worksite Size**

- **Public garage or parking lot (30%)**
  - 1-25: 26%
  - 26-100: 34%
  - 101+: 41%

- **Private/employer garage or parking lot (21%)**
  - 1-25: 46%
  - 26-100: 7%
  - 101+: 47%

- **Neighborhood streets (15%)**
  - 1-25: 63%
  - 26-100: 12%
  - 101+: 25%

4. Where do you typically park when you drive to work?
Parking by Business Type

Commuters who use public garages and lots are more likely to be Government workers.

Retail  | Gov't  | Tech  | Restaurant | Hospitality | Light Office
---|---|---|---|---|---
Public garage or parking lot (30%) | 28% | 55% | 17% | 36% | 35%
Private/employer garage or parking lot (21%) | 10% | 29% | 19% | 33% | 5%
Neighborhood streets (15%) | 12% | 2% | 18% | 31% | 28% | 8%

4. Where do you typically park when you drive to work?
Commuter Segmentations
Driver Segmentation

About half (49%) of drivers are open to alternatives to driving.

Among SOV Drivers, 772n

- Drive alone and always will: 42%
- Drive alone and are open to other options: 24%
- Drive alone but would prefer not to: 25%
- Else: 9%

**Drive alone and always will:** Drive alone at least once a week and strongly agree that they prefer to drive and plan on continuing to do so.

**Drive alone and are open to other options:** Drive alone at least once a week and somewhat agree that they prefer to drive and plan on continuing to do so.

**Drive alone but would prefer not to:** Drive alone at least once a week and disagree that they prefer to drive and plan on continuing to do so.

**Else:** Drive alone at least once a week and did not answer that they prefer to drive and plan on continuing to do so.
Drivers in San Francisco, who work for a large or Tech company, have flexible work schedules and are younger are more likely to consider other transportation options.

% of SOV drivers who would prefer not to drive, by demos

- Technology: 72%
- San Francisco: 66%
- 101+ emp.: 60%
- Government: 60%
- Work schedule is flexible: 57%
- Light office: 57%
- Age 18-49: 53%
- Peak hour commuter: 53%
- South Bay: 52%
- Full time worker: 51%
- Commute 10 to 50 miles: 51%
- Non-Parent: 51%
- Palo Alto: 50%
- Commute 50+ miles: 49%
- Overall: 49%
- East Bay: 48%
- Commute 1-10 miles: 48%
- Parent: 47%
- Retail: 44%
- 26-100 emp.: 44%
- Non peak hour commuter: 43%
- Part time worker: 43%
- Peninsula: 41%
- Start work at a specific time: 41%
- 1-25 emp.: 41%
- Hospitality: 35%
- Age 50+: 32%
- Restaurant: 31%
Overall Employee Location

The map represents the percentage of downtown employees by home zip code.
Target Driver Location

The map represents the percentage of Target Drivers (378n) by home zip code.
The map represents the percentage of Target Drivers who work for large companies, by home zip code.
Age 18-49 Location

The map represents the percentage of Target Drivers Age 18-49, by home zip code.
The map represents the percentage of Target Drivers who commute during peak hours, by home zip code.
The map represents the percentage of Target Drivers who have flexible work schedules, by home zip code.
The map represents the percentage of Target Drivers who work full time, by home zip code.
Technology Worker Commuter Location

The map represents the percentage of Target Drivers who work for tech companies, by home zip code.

Technology Workers

- 0% to .5%
- .5% to 1%
- 1% to 2.5%
- 2.5% to 5%
- 5%+
- Palo Alto

The map represents the percentage of Target Drivers who work for tech companies, by home zip code.
Government Workers Commuter Location

The map represents the percentage of Target Drivers who work for the Government, by home zip code.
Conclusions
Conclusions

- Currently just more than half (55%) of employee trips into Downtown Palo Alto are SOV trips.
  - Nearly half (49%) of these SOV drivers expressed an interest in seeking alternative transportation options.
  - Those most likely to seek alternative options are more likely to work for tech companies and/or large employers, be younger, live more than 10 miles from Palo Alto, and have a flexible work schedule.
  - They have concerns about transit as an alternative, with primary concerns being a real or perceived lack of convenience for routes, schedules, and locations of stops. Cost is also a concern for some.
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