



## Employer Focus Groups and Survey Results

Marin Economic Forum



## **Alternative Transportation Modes: Engagement in More Demand Employer Focus Groups and Survey Results**

As support for TAM and 511.org activities, Marin Economic Forum (MEF) used its connections to Marin County to local businesses, specifically small to medium-sized businesses to facilitate focus groups and surveys concerning commute choices and options for workers and business needs. These links to the greater business community are part of MEF's mission as a hub of information and networking for Marin County's economy. Both TAM and 511.org are seeking ways to expand their coverage and breadth of services through local businesses in Marin County and for Marin County businesses to more completely utilize alternative commute options instead of single occupant vehicle trips. In short, these focus groups and surveys were administered through chamber and employer contacts, as well as MEF contacts with city councils and the Board of Supervisors, on the attitudes, knowledge and behaviors of businesses concerning commute/vehicle trip issues.

- Attitudes: What is the business' stand on these issues currently and why does that attitude exist?
- Behaviors: What has the leader done with respect to advocating, volunteerism, funding, or other engagement with these issues and potential solutions?
- Knowledge: What does the leader know or not know about the data, the environmental issues, the flow of workers in and out of Marin County?

There are many models of focus groups on social issues, and we can discuss the best organization, facilitation and attendance to maximize the information gathered. This report discusses the findings from the focus groups (we ran five groups between November 2012 and March 2013) and the survey.

### **Focus Group Questions and Summaries**

1. How do your employees commute to work?

In the focus groups, there was a mix of responses to this question, where many workers were coming to work in single occupant car trips. Some of the respondents were coming in public transportation. Kaiser was the standout in terms of combining a sophisticated vanpool network, public transportation, and bike travel.

2. What are issues/challenges for you as an employer about your employees' commute?

The major items that came up in our focus groups on issues and challenges was the loss of time in commute or the higher wages that are sometimes needed to retain and support employees with longer and more costly commutes. Most employers have made adjustments to work schedules and to their performance metrics if commuting issues exist.

### *Alternative Commute Questions:*

1. What comes to mind when we say "ridesharing or commute alternatives?"

Very few respondents knew the definition of "ridesharing or commute alternatives" by name. In most cases, the focus groups began with an explanation of these alternatives, and it became obvious during the focus groups that marketing the wide array of alternatives available is a major next step. TAM and 511.org staff that came to the focus groups provided explanations about commute alternatives, the ways to access alternatives, and whether those needed to come from the employer or the employee.

In many cases, focus group members were excited about the alternatives available and the possibilities of considering ways to expand on these themes.

2. Have these ideas been considered much personally or for the company?

In some cases, specifically in health care and municipal employers, alternative commute options were discussed at length. The ability to match schedules or to locate alternative transportation options in specific places for employees was perceived to be an impediment to alternative commute options use. From employees, themes included convenience, reliability, and flexibility. What is perceived to be missing from many of the alternative transportation options in place is intraday flexibility; employees usually schedule around that lack of flexibility to take advantage of the public or alternative commute options.

Some companies are participating in the IRS Commuter Choice Program, which provides employers an opportunity to reduce payroll taxes while at the same time, giving employees a chance to significantly reduce transit, vanpool and some bicycle maintenance commute expenses. What was surprising was the number of businesses that had not heard of this IRS program. Furthermore, with the recent passage of SB1339, and the anticipated regional employer mandate requiring those employers with 50 or more employees to provide their employees with some commute support (including the option of simply allowing them to take advantage of the IRS pre-tax program), there is a clear need for greater outreach to educate and inform employers. TAM is working to coordinate BAAQMD and MTC-employer outreach and education on this requirement, for which compliance may not be required until mid-2014.

3. Is parking near work an issue for your employees, free, easy to use?

Parking was an issue for most focus group participants, but negative attitudes were driven more by work location and culture than by reality in some cases. For example, those businesses that reside in downtown areas of San Rafael, San Anselmo, Mill Valley, and Sausalito, all suggested the lack of unmetered parking, the lack of parking in general, and inflexible parking enforcement, are issues in terms of parking for employees.

Stories were varied and usually personal. For example, San Anselmo has a parking program where an employer can purchase a \$25/year parking exemption from metering in the downtown area to park for workers or themselves as business owners. This practice, while applauded by some, to a limited supply of parking spots for other businesses (who are not able to get in the front door fast enough when parking passes are available), and some chaos for customers of retail and restaurant businesses. This can be a detractor to these businesses coming to San Anselmo. Businesses from Mill Valley, Sausalito, and Larkspur suggested similar issues.

In other cases, such as Corte Madera, parking was plentiful and generally free, and not an issue for merchants, employers, and customers. It is important to realize that we asked these questions in a snapshot format, where there was not any real discussion or questions about the 3-5 year view on expansion of infrastructure.

4. Are you familiar with organizations that provide assistance on commute alternatives?

This was a key result from the focus groups and information gathered. There was little to no familiarity with the basic services provided by 511 or TAM short of public transportation or highway signage.

Emergency ride home programs were unknown by most; the carpool or vanpool incentives were also basically unknown. The 511.org ride matching services were known by folks but usually treated with some skepticism in terms of being technologically efficient and on the cutting edge; it was also stated numerous times that the time spent on signing up for the rideshare or emergency ride programs was long and the forms were more time-consuming than expected.

One suggestion to come from this discussion is to try and provide Marin-based employers with a specific way of integrating into the system and also providing more information in general about the programs and the linking to other commuters.

- Have you heard of 511.org or Transportation Authority of Marin (TAM)? If so, what is your impression of those organizations?

Most had heard of 511.org, primarily through freeway signage and alert billboards. Some had heard of TAM; when MEF spoke with focus groups where elected officials and staff from a municipal organization were present, the amount of awareness increased. The impressions were good, for those that knew each organization (TAM and 511.org). There was some rare confusion with SMART and MTC. Certainly what TAM and 511.org do was a mystery to many, which further points to a need to advertise more completely and expand education and marketing for both 511 and TAM in Marin County.

- Please identify 511.org services for which you may be aware or what services for which you may want more information.

This question asked about knowledge and attitude toward information about 511.org services available. Table 1 shows the general results from the focus groups. These results will be in contrast to the individual employer surveys discussed later in this report.

Type of Services	Aware? Yes or No	Want more info? Yes or No
1. Carpool/Vanpool Matching (or match lists)	Some	Yes
2. Vanpools (for 7-15 employees)	Some	Yes
3. Commuter Choice Tax Benefit (IRS pre-tax) (ask about the new State law if over 50 employees with the idea of providing information only?)	Few	Yes
4. Alternative Work Schedules	Many	Yes
5. Telework	Many	Yes
6. Density Maps/Maps Generally	No	Yes
7. Surveys	No	Yes
7. Bicycling/Walking information	No	Yes
8. Emergency/Guaranteed Ride Home Program	Few	Yes
9. On-Site Events (i.e., for those interested in ride sharing)	No	Yes
10. Incentives for carpooling or vanpooling	Some	Yes
11. Assistance for developing a commuter program	Few	Yes

- Does your organization provide information to employees about alternative ways to travel to work (e.g., carpooling, transit, biking or walking)?

Very few organizations that participated in the focus groups, short of those with a large number of employees or those that were representing municipal organizations, suggested that they had provided information about alternative transportation to and from work. In many cases, it was a lack of knowledge about the services, programs and possibilities. In other cases, it was not a priority. However, as suggested above, almost all participants were willing to take on new information and find out more as a beginning to distributing the information more completely.

- If gas prices reach \$5/gal and stabilize there for an entire year, what would the impact be on your employees and on your business? What if gas prices reached \$10/gal?

This was our “curve ball” question. In many cases, which did not surprise me, the respondents suggested that such a change would not affect commutes. They did say that \$10/gal could be a deal breaker; at \$5/gal, little

was likely to change. MEF discussed the ideas of cyclical or transitory change versus permanent change, which is the goal of many programs to shift people culturally from their single occupant vehicle trip to a more efficient way of getting to work. Many respondents said that the intraday inflexibility was a major contributor to that: the additional gas price is worth the freedom, which includes not necessarily carpooling or vanpooling, even if you are the driver that day.

### Sharing Resources Questions:

**Having access to a shared (hourly rental) bicycle, car during the day increases the commute options for those who may be willing to walk, use transit, or share their commute travel in some other way such as in a carpool or vanpool.**

9. Would your company be willing to promote the use of a shared-bike program (**Example: employees could rent a bike for midday work travel or personal errands**) if hourly rentals were located nearby?

For the shared bike program, three major issues came up (which were all surprising to us, but were corroborated in the individual survey results):

- Bike programs will not work very well in Marin due to safety issues (Marin County does not have infrastructure for a bike program) in terms of road safety;
- The market for a bike-share program is most likely to be used by men versus women (due to the physicality and dress code and ability for a man to change and maintain themselves after a bike ride); and
- Marin's topography limits the ability to use or expand such a program.

One solution posited included using a health club as a strategic partner and hub of a bike-share program, which would then provide (as a partner) showers and changing facilities for riders. Also, using existing bike infrastructure is difficult because there really is no system in place. The conversation revolved around implementation difficulties; Corte Madera based businesses suggested that shopping center employees may be a good place to start such a program, which would provide an opportunity to go into Corte Madera more completely or get off the mall without fighting for parking afterward.

10. Would your company be willing to make space available for bike-share docks, parking, etc.?

Few companies felt like they had the space available for bike docks and parking. Some of the companies interviewed suggested that they allow their employees to bring their bikes into the place of work for storage, but the ability to have a rental space was low. It is likely that a municipal relationship would need to come in and help provide space or designated areas for docks and parking as an overt partner of these programs.

11. Would your company be willing to promote the use of car-share, parking spaces in their parking lot (**Example: Employees could have access to a shared vehicle program for mid-day work travel or personal errands**) if hourly rental vehicles were located nearby? Would your company, if able to, be willing to pay for or make parking spaces available for a car-share vehicle?

In many cases, businesses that were part of the focus groups said that they would provide for a car-share vehicle if the space existed. Because many of the businesses that were part of these groups were in downtown or more urbanized settings, parking availability was already a concern. There was discussion in multiple groups about having such space available from the local municipality, where the city provided the space as a partner in these efforts.

12. Would your company consider membership of a car-share program (**may need two cars just in case one is out**)?

In theory, participants agreed that membership would take place in such a program. Many participants referenced Zipcar as a model for a car-share program. However, there was more skepticism. There were concerns over liability assignment, trust of others driving the vehicles, and overall maintenance of the vehicles. The City of San Rafael suggested that they had many cars available for use by city staff and workers as needed, but that the liability issues in making their cars available to a broader audience was a deal breaker.

13. Do you see any advantages or benefits in providing information on commute alternatives to the employees?

We heard from participants that there would be benefits to providing the information. Many participants were skeptical of how the employees would use the information and benefits without overt incentives to do so. This is also a prevalent theme throughout the discussions: are incentives available and are the efficiencies in move to alternative transportation enough to move employees to change?

14. How do you communicate with your employees generally? (e.g. mail, meetings, e-mail, intranet, etc.)

All participants suggested that e-mail was the main way in which employees and employers communicated with one another. In some cases it was texts; for specific employers, texting was a main way to communicate (this was in the trades and other construction industries).

15. As an employer, are you willing to distribute information about commute alternatives?

Focus group participants all said they were willing to distribute materials about alternative transportation programs to their employees. Some were ready to do so immediately. In some cases, information was distributed and connections were made for 511 and TAM staff to larger employers; smaller employers were also provided information at the focus groups about contacting 511.org and TAM for more information.

16. Do you feel there is value in partnering with nearby businesses to promote commute alternatives in your respective areas?

Most focus group participants suggested that there was major value in partnering, though most of the discussion was focused on the lack of a plan to make that partnering work. Many were concerned about safety with respect to unknown fellow commuters, timing and efficiency issues, and general lack of control over the process.

#### *Additional Focus Group Commentary from Sausalito*

One of our focus group participants in Sausalito provided follow-up comments about transportation and Marin County from the participant's perspective:

*We need to implement both short term and long term strategies, starting with transportation initiatives that we can put in place soon, while we're planning and building more ambitious, expensive, but more effective solutions over time.*

*In southern Marin, we should plan and implement water transportation solutions, with more ferries, water taxis, and small motor launches, with shoreline docks and support facilities to serve them.*

*Support Marin Trolleys, starting with planning, funding and building the first demonstration line through the Ross Valley, connecting the towns of Fairfax, San Anselmo and San Rafael with a new rail based streetcar system sharing Center Blvd. Red Hill Avenue and Fourth Street with cars.*

*Initiate on demand shuttle system in each neighborhood for short (two mile) trips and to serve as a feeder to public transit, linking homes to transit stops that are too far apart to walk. These shuttles or Jitneys would be owned and operated by neighborhood Home Owners Associations. They would promote safety as well.*

*Thanks for asking for input and feedback.*

*Thanks for seeking to improve our transportation systems.*

*Be bold.*

*Work on what we know will work.*

*Remember the four F's for effective transportation:*

*Fun (This one gets overlooked too often. Buses aren't fun)*

*Fast (Buses aren't fast)*

*Frequent (Buses don't run frequently)*

*Free (or at least reasonably affordable)*

*Streetcars are the answer – we need to go to rail because of its intrinsic fuel and people moving efficiency. Bikes and Jitneys will be the feeder. SMART will be the inter-regional spine. This is a proven, well connected system we know will work. People like rail. People like trolleys. It's worth the money. Let's invest in what we know will get people out of their car. We won't get them out of their cars until we provide a viable alternative.*

*Build a fully dedicated bicycle transportation system/infrastructure here in Marin like they have in the Netherlands. Run bikes through the Alto Tunnel to connect Southern and Central Marin. The few people who live along this existing public transportation corridor shouldn't trump the needs of the many. They choose to buy along a public right-of-way. It's ours, not there's.*

Sausalito is a place in Marin where there is a nexus among all probable transportation methods and a long history of issues and experimentation with all of them (walking, cars, buses, bikes, boats, and now possibly trolleys).

**Survey of Individual Business: Focus on Small and Medium-Sized Enterprises**

Once the focus groups had been completed, the next task was to finalize a survey instrument to seek out individual businesses, specifically those with fewer than 50 employees, to provide more breadth to the survey and connect to the employee surveys as distributed by the summer 2012 efforts of TAM and 511.org. This survey instrument was the product of the focus group discussions, and further detail work with TAM and 511.org staff. The first question was for the business to provide their zip code. Table 2 shows the distribution of the twenty (20) surveys returned by Marin County businesses.<sup>1</sup>

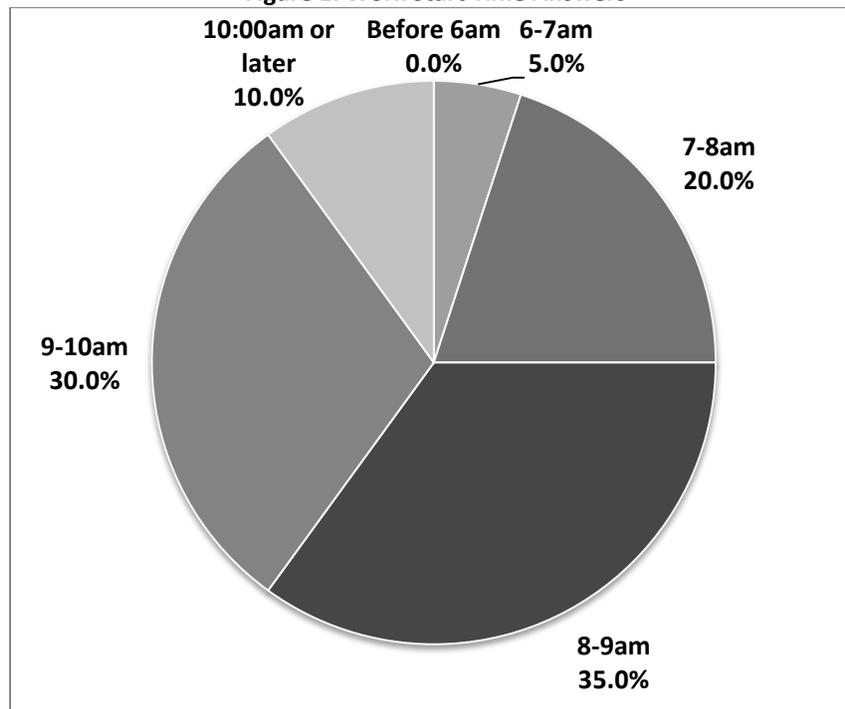
Table 2: Zip Codes of Survey Respondents, Distribution in Marin County

94901	San Rafael	94939	Larkspur	94957	Ross
94903	San Rafael	94945	Novato	94960	San Anselmo
94904	San Rafael	94947	Novato	94965	Sausalito
94925	Corte Madera	94949	Novato		
94930	Fairfax	94950	Olema		

**Question 2: What time do your employees typically get to work during the week? (Check one)**

This question was designed to tell us if there were any nuances to the start of workdays or any patterns that would inform us about commute that were not already known. Figure 1 provides the proportions of these data; the answers began with “Before 6am” and then asked in hourly intervals to “After 10am” as a work start time. While most of the start times are after 7am, the small sample may not pick up financial market activity and construction/landscape/trades activity due to seasonal start times being different for different parts of the year.

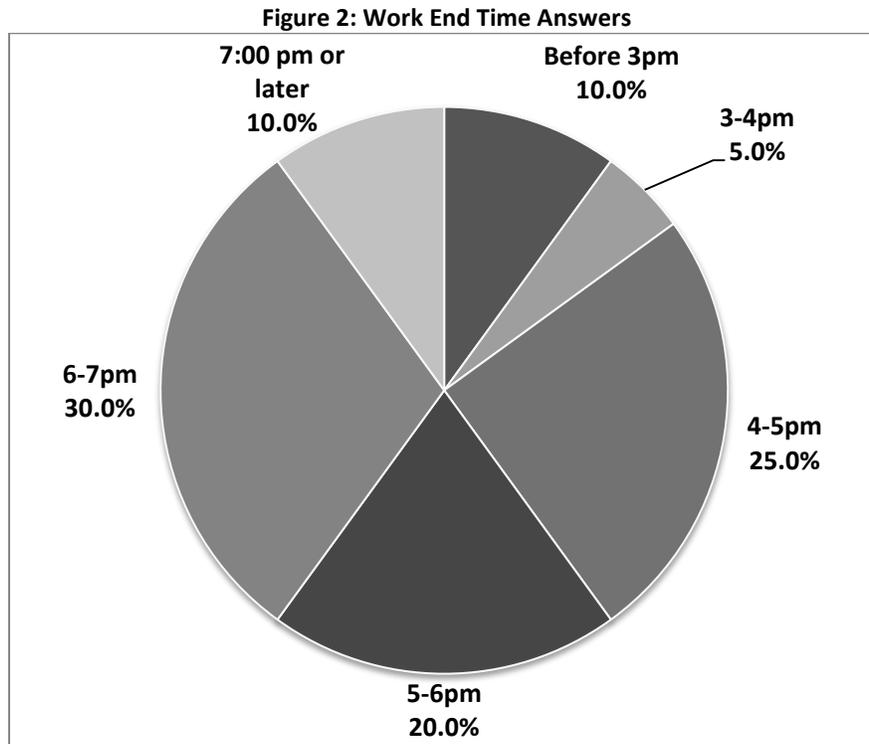
Figure 1: Work Start Time Answers



<sup>1</sup> One of the recommendations from this report is to survey through chambers of commerce at events, mixers, and other gatherings where there would be a large number of small businesses represented at the same time. MEF struggled to get the local chambers of commerce to provide the survey as stewards of this information-gathering project.

**Question 3: What time do your employees leave for work during the survey week? (Check one)**

As an analog to Question 2, we asked a question about the work end time as a way to pick up the return commute timing and nuances. Figure 2 shows these results.



**Question 4: If your company has atypical arrival and departure times for employees, please describe the situation.**

This question allowed for a simple explanation of any nuances, atypical or firm-specific, commute behavior that the respondent wanted to provide. This question was an open-ended one; respondents could provide as much or as little information as they liked. Table 3 provides the answers; the answers have been changed only to correct any grammatical issues from the survey.

- Salaried staff usually work longer hours due to no overtime or time constraints.
- Staff works different shifts, as we are open from 10-9 most weekdays.
- We're a gym, so I have employees coming and going between 5am and 12 midnight. The times I checked for Questions 2 & 3 are approximations for a majority of my employees.
- Lodging facility, housekeeping, maintenance as needed
- Restaurant operations have multiple shifts
- Above for administrative staff. As a homecare organization, most of our employees are out in the field seeing patients, and visit the office as needed
- (The work is) very project based, lots of offsite meetings.
- Normal business hours
- We are a flexible environment people arrive between 7:45AM and 10:00AM, and leave between 5:00PM and 8:00PM.
- Shift work providing health care, 6-2 and 2-10
- We hire teachers from the local high schools/middle schools- they commute to the three other campus' to tutor after school - all Marin county Mill Valley, Larkspur and San Anselmo

- Self-employed, work from home

**Question 5: Check any of the following that describe employee parking options at work (Check as many as applicable)**

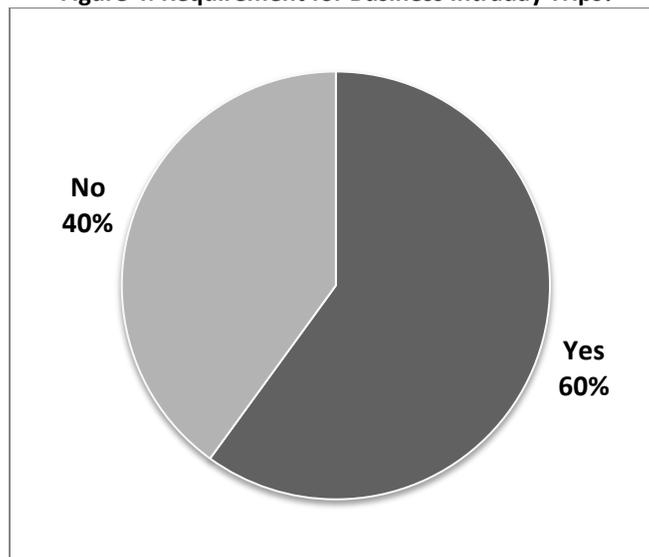
This question asked about parking from the employee standpoint; as with many of these questions, a fear we had was that the employers would ask from their perspective as the employer and not from the employee’s perspective. This question provided the beginning of the employee’s perspective. Figure 3 provides these results.

**Figure 3: Distribution of Answers on Employee Parking Options**



**Question 6: Are your employees required to commute to different locations during the work day?**

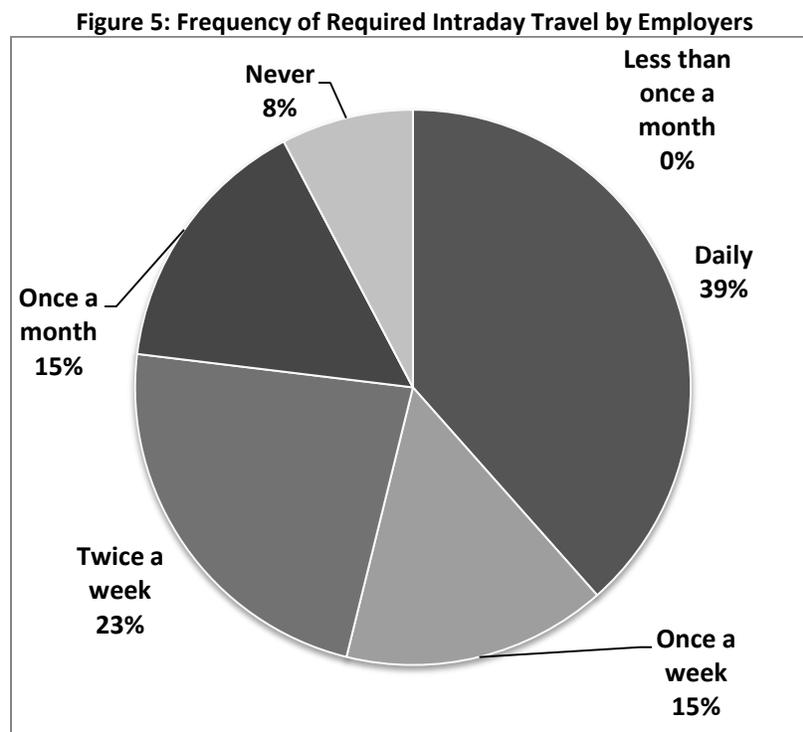
**Figure 4: Requirement for Business Intraday Trips?**



Question 6 provides some insight about employers who asked about intraday trips from a business standpoint. One of the major issues that came from the focus groups was how to provide incentives for folks to not drive themselves in single-occupant vehicle trips if they had either personal or business reasons to have intraday trips. This question looked at this issue from the work requirement standpoint. Figure 4 shows this binary answer and its proportions throughout our respondents.

**Question 7: If employees are required to commute to multiple locations, how often? (Check all that apply)**

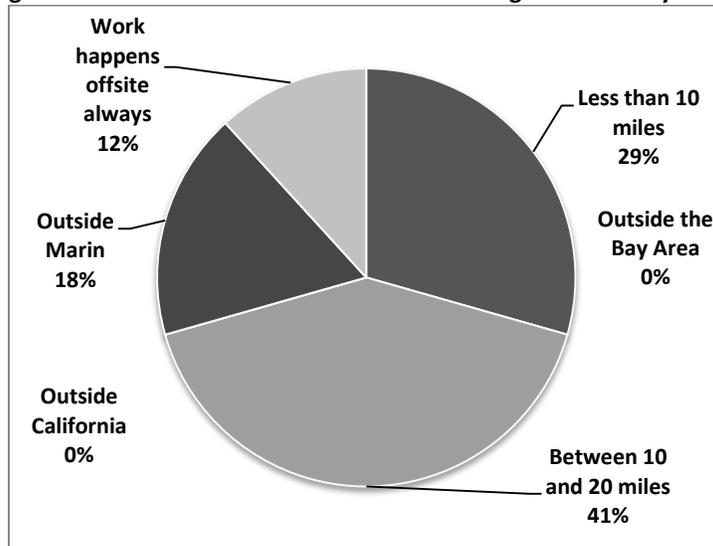
This question is about the frequency of commuting to required, different, intraday locations of those who answered “Yes” to Question 6. As a follow-up to Question 6, the frequency shows the potential demand for alternative programs, such as a car share or bike share program. Also, the frequency of intraday, required travel is likely to depend largely on the type of industry; construction and trades work is likely to have different locations and intraday travel for supplies and other needs; office workers may have very little to no intraday travel that is required by their employer. Figure 5 shows this distribution.



**Question 8: If employees are required to commute to multiple locations, how far do they go beyond their work commute? (Check as many as applicable)**

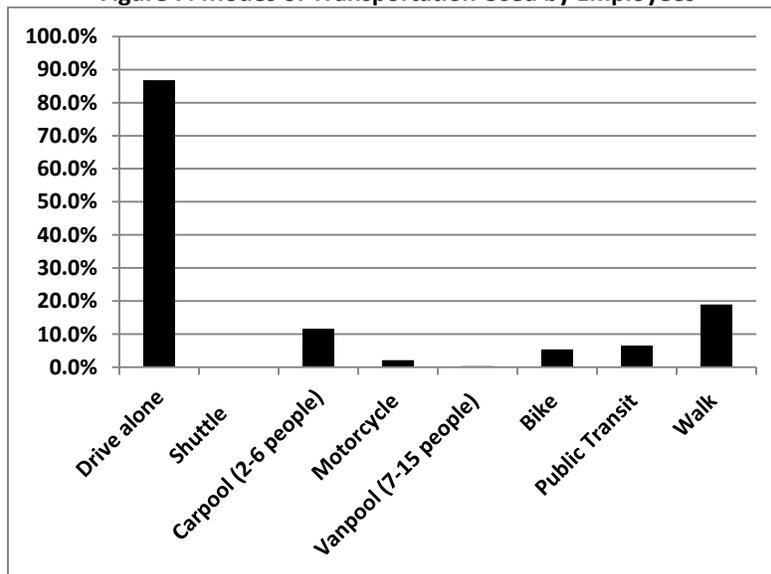
As a second follow-up to Question 6 above, this question asked about the distance traveled for required, intraday travel. This distance issue also helps show the demand for alternative methods of intraday travel; for example, if most trips are more than 10 miles, it is unlikely that a bike share program would suffice these needs versus a car share program. Also, a “truck share” program may also be good to explore, as there may be needs for capacity and hauling for intraday travel as well as moving people. Figure 6 shows these distances.

**Figure 6: Estimated Distance Traveled on Average for Intraday Travel**



**Question 9:** What modes of transportation are used by your employees? Please provide an approximate percentage for each of the modes below which represents the percentage of your employees that uses each mode. Please leave blank if 0% for a specific mode. (or check all that apply to speed up response time?)

**Figure 7: Modes of Transportation Used by Employees**



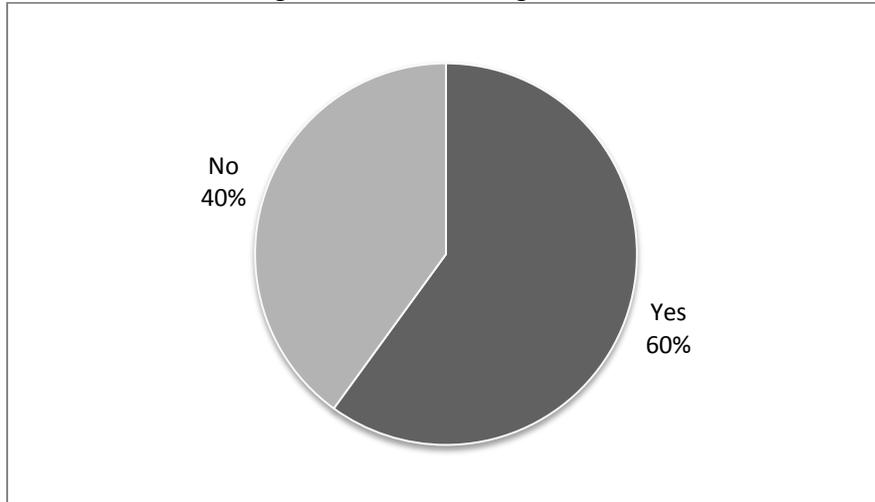
Question 9 begins the survey's look at how employees get to work and attempts to confirm or dispel the idea that Marin County employees generally drive by themselves to work. The focus group results suggested that the vast majority of workers drove by themselves (single vehicle occupant trips), and Figure 7 shows this is likely the case across Marin County. These results corroborate the employee survey results, anecdotal evidence, etc.

**Question 10: Does your company allow telecommuting (employees working from home)?**

This question asked about telecommuting as an option for workers. Our focus groups suggested that employees who want the flexibility to work from home and "telecommute" was rising in number. Due to family issues and non-work related, intraday travel, telecommuting provides workers with more time to do work (avoided

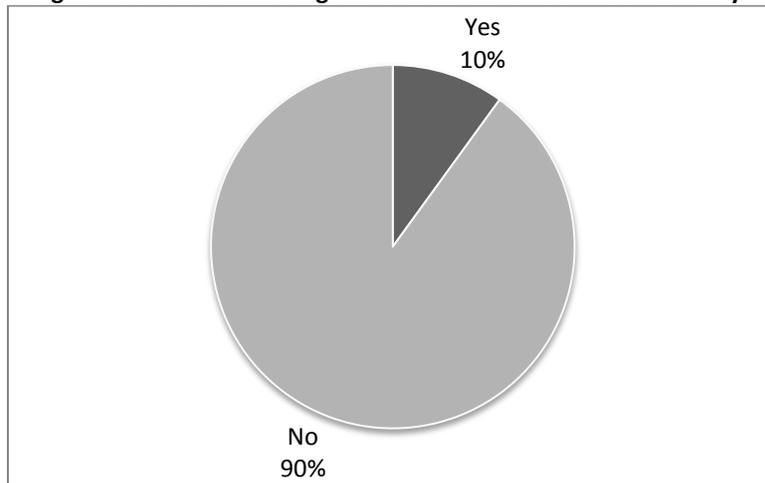
the loss of productivity while commuting to work in Marin County) and also provided an ability to pick up kids from school, run errands, and accomplish more that would be done at work. Figure 8 shows the answers to this binary question.

**Figure 8: Telecommuting Allowed?**



**Question 11: If you answered "Yes" to Question 10: Does your company policy on telecommuting have to do with the commute time for employees?**

**Figure 9: Is Telecommuting Allowed Because of Lost Productivity?**



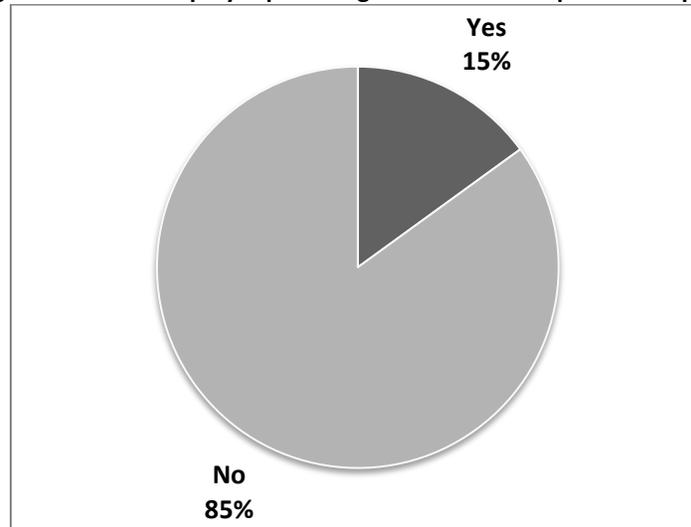
As a direct follow-up to Question 10, one concern of this study was that sitting in traffic reduced productivity for employers. As a result, there would be more demand for ways to reduce commute times or make workers productive during commute through alternative commute options.

A hypothesis from this opinion was that some employers would use a telecommuting option to avoid this lost productivity and this idea would be explicit in strategic planning and in direct communications with the employees using or not using the telecommuting option. Figure 9 shows these results.

**Question 12: If your employees use a carpool or vanpool, does your company provide financial incentives for such a choice?**

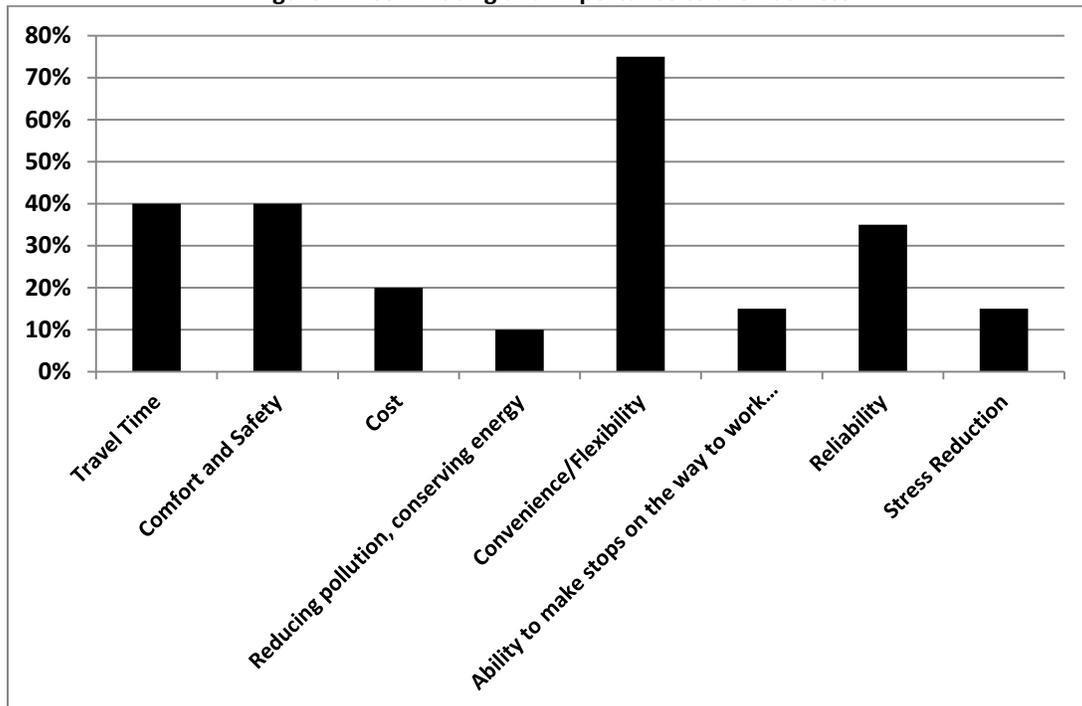
This question asked how businesses in Marin use financial incentives to entice workers to use either carpool or vanpool options. These incentives could be in direct payments to those that use their own car or van, indirect payments to subsidize the worker paying for entry into a car or vanpool, or some other form. There could also be matching programs with government, or the use of the IRS Commuter Care Benefit. SB 1339, as discussed above, is a recent piece of legislation about providing information on incentives for alternative commute options to employees. Because this survey targeted small and medium-sized businesses, some of these businesses may not know or have yet provided information to employers. This was a theme that came up in our focus groups as well. Figure 10 shows the responses.

**Figure 10: Is the employer providing incentives to carpool or vanpool?**



**Question 13: What is the most important aspect of your employees' commute to your company? (Select up to 3)**

**Figure 11: Commuting and Importance to the Business**

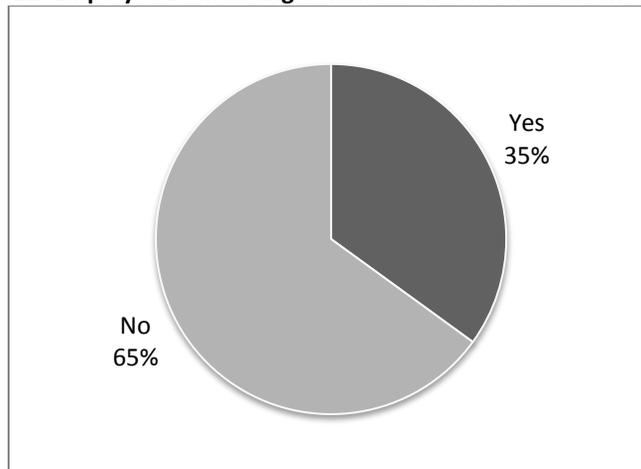


Question 13 is a follow-up to Question 11. If the employers are concerned about commute times, lost productivity from workers commuting, and other issues in how employees get to work, the hope is that there are certain aspects of this issue that have come up in strategic planning and other discussions where employers have identified specific, poignant issues. Figure 11 shows some possibilities.

**Question 14: Have your employees indicated an interest in specific commute alternative options?**

This question is asking about incentives and commute options from the employee side to see how employers are perceiving (or actually hearing) that employees want to receive direct or indirect benefits to use commute option alternatives. Figure 12 shows these results.

**Figure 12: Employee Demanding Commute Alternatives and Incentives?**



**Question 15: If you answered "Yes" to Question 14, please pick three of the following:**

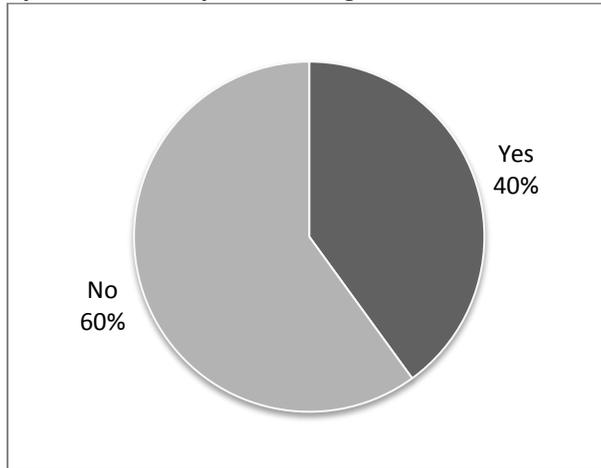
This question follows up Question 14 to look at the most often asked about as a way to look at alternative commute options. In general, employees were walking to work or taking public transit as an alternative to single-occupant vehicle trips. Because there were so few firms that said “Yes” to Question 14, the answers to Question 15 should be considered as very specific to these companies and not indications of an overall trend. The choices are shown below.

Carpool	Walk
Bike	Transit
Vanpool	Work at home for a regular workday

**Question 16: Does your company know about a federal program that allows your employees to use pre-tax dollars to pay for transit, vanpool and bike commute expenses? (IRS Commuter Choice Tax Benefit, for example)**

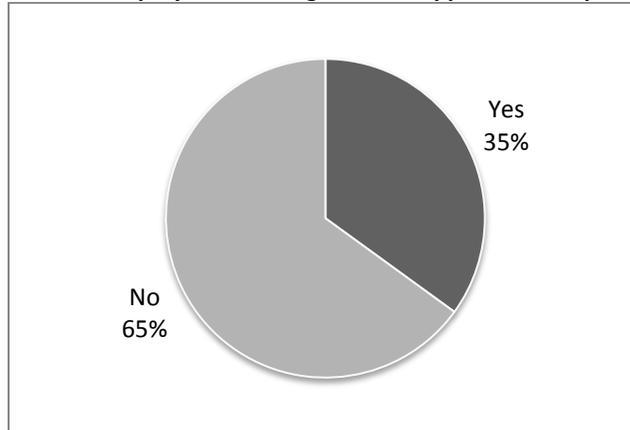
This question is about knowledge of the IRS Commuter Choice Program and shows those that have and have not heard of this or any federal programs. Figure 13 shows these results. These responses, much like the focus group responses in terms of awareness, suggest there is a lot of work to do concerning the marketing of such programs, including and beyond the IRS program.

**Figure 13: Are you aware of any Federal Programs for Alternative Transportation?**



**Question 17: The IRS Commuter Care Tax Benefit provides a pre-tax opportunity to reduce eligible employee commute expenses by up to 40%. Would your company want free support to set up such a (pre-tax commute) program?**

**Figure 14: Would the Employer want to gain free support to set up such a program?**

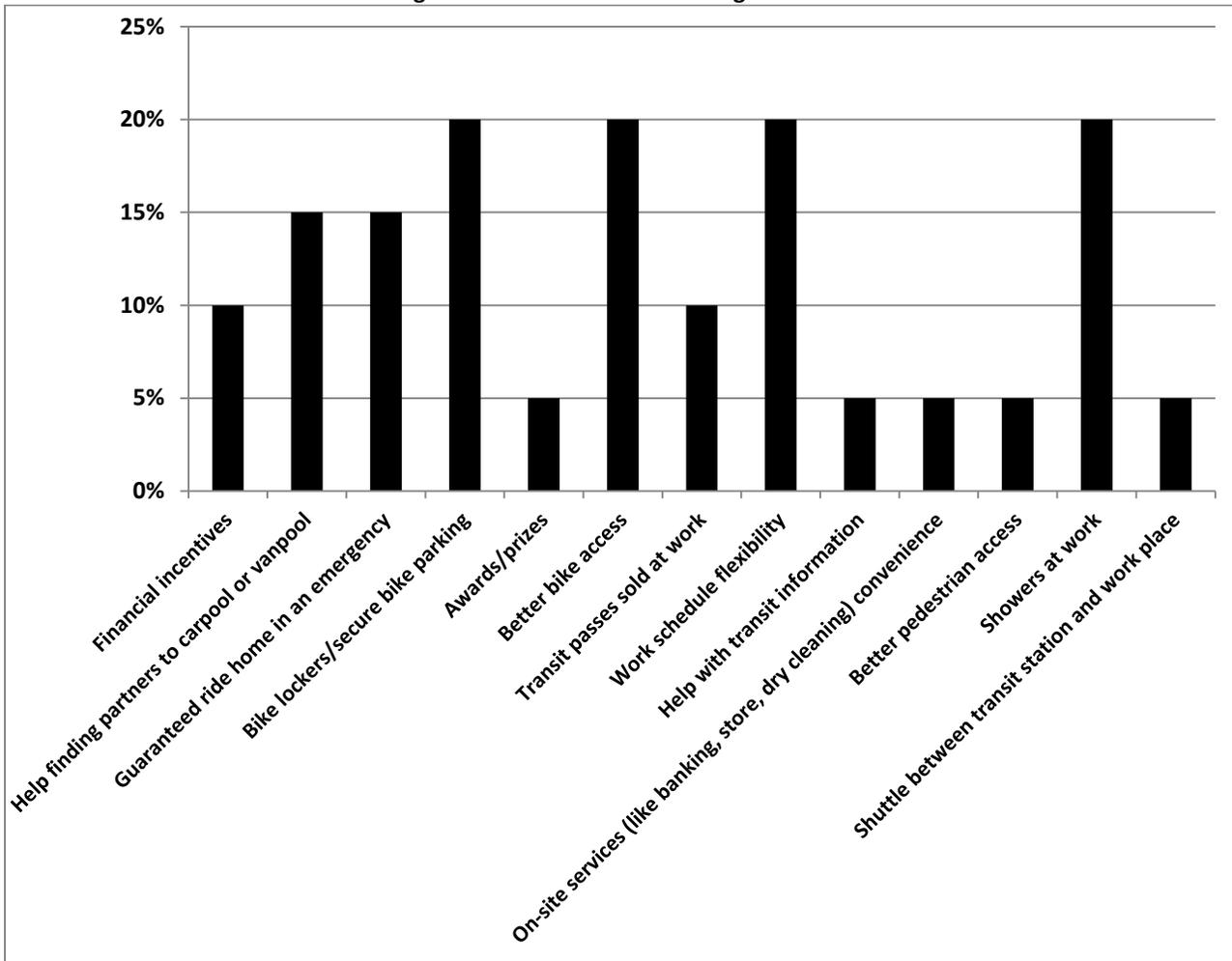


This question is a combination of follow-up to Question 16 and also to see about the attitude of the employer toward providing employees with information and access to the IRS-allowed use of pre-tax dollars for some commute expenses even when not required to do so by SB 1339 and the anticipated regional mandate. If there were any alarming results in this survey, this question showed some disconnect between employers, employee commutes, alternative transportation options and incentives. Figure 14 shows these results.

**Question 18: For those employees that drive alone to work, does your company encourage them to use different ways to get to work (like carpooling, transit, biking or walking)? If so, which of the following are used to promote the use of commute alternatives? (check all that apply)**

This question is more of a follow-up to Question 9, assuming there were going to be some percentage greater than zero that drive alone. Figure 15 shows these results, and shows a fairly-even spread across the possibilities. These answers begin to help TAM and 511.org consider what employees may consider as alternatives if offered or better connected to them from an informational standpoint.

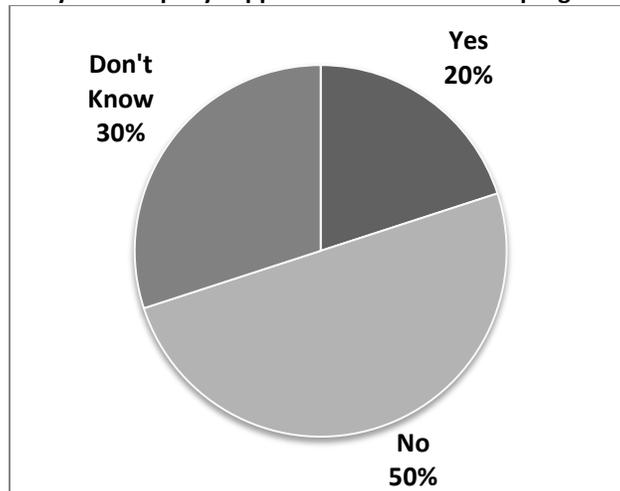
Figure 15: Alternatives to Driving Alone



Note: The sum of these percentages will exceed 100% because the respondents were allowed multiple answers

Question 19: Would your company be interested in a bike or car share program at or near worksite?

Figure 16: Would your company support a bike or car share program close to work?

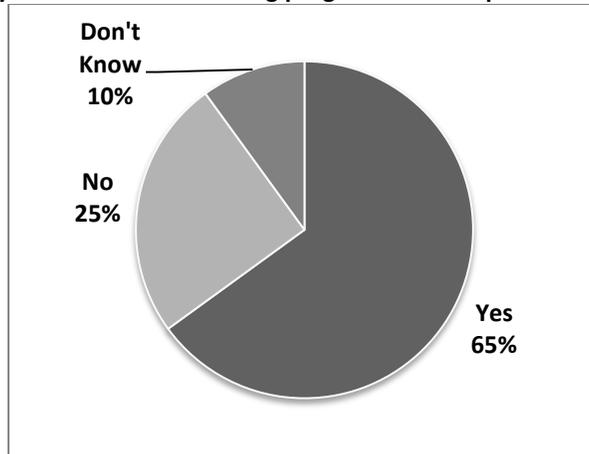


Question 19 asked for a simple yes or no to the respondent's attitude toward a bike or car share program near the workplace. Figure 16 shows this data, again not amazingly friendly toward a program.

**Question 20: Are you familiar with free 511.org services to promote and support commute alternatives to driving alone?**

This question asked a simple yes or no about the firm's knowledge of 511.org's services with respect to commute options. This is positive information as that the majority said they were familiar. See Figure 17 for these results.

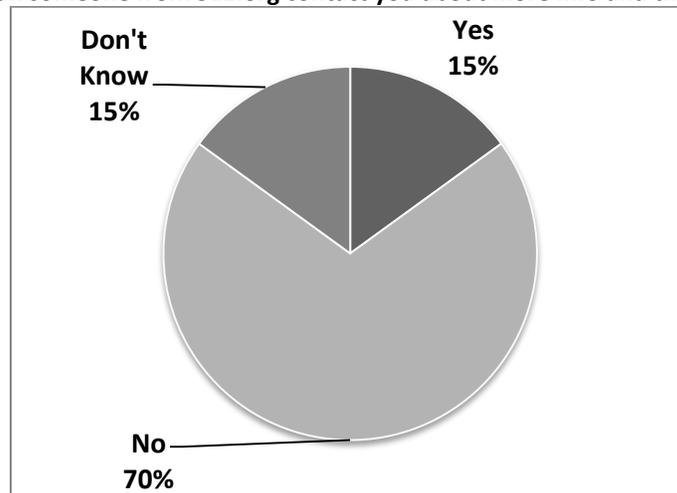
**Figure 17: Are you Familiar with 511.org programs with respect to commute options?**



**Question 21: Would you like a 511.org Employer Services Representative to contact you with additional information?**

This was another answer that was disappointing in terms of attitudes and behaviors toward 511.org and commute programs in general. Only 15 percent said yes openly here; see Figure 18 for these results. This question was one of the few that had results that were in stark contrast to the focus group results. In most cases, the focus groups were overwhelmingly happy to receive more information about 511.org services and ways to help provide more and better commute options. There is some unfortunate contrast here to the employee and focus group results.

**Figure 18: Can someone from 511.org contact you about more info and these programs?**



## Conclusions and Recommendations

Because this report combines surveys, focus groups and interviews with employees and employers in Marin County, many of the conclusions come from where these groups both connected on attitudes, behaviors and knowledge about alternative commute options, intraday transportation options, and incentives to change behavior. Some general themes that came from the information gathered is that single-occupancy vehicle trips are a cultural issue, and the economic and social issues involved in making the choice to use alternatives would run against the cultural barrier. The barrier is built on the perception that driving alone provides more time flexibility, more convenience and more freedom in decision making around getting to and from work. While the question of intraday options is different than alternative commute options, they are connected in terms of the time flexibility and convenience issues.

On the employee side, commute distances are approximately 17.2 miles one-way on average. This commute distance suggests that Marin County has many employees that are good candidates for public transit and carpool/vanpool options in terms of commute. However, employees that drove less than 5 miles on average still drove themselves 74 percent of the time, and many others at this short distance walked or biked (21 percent). Work arrival and departure times are well distributed in Marin County, where 8am to 10 am are the major arrival times and 5pm to 6pm is the major departure time. If employees were to use a commute option, it seems that carpool and public transport are major options, where telecommute is preferred most of all. This follows focus group data from employer focus groups and survey results. Many employees were not willing to consider using bike and car share programs; the employer results suggest this could be due to a lack of a model or knowledge about these services.

On the employer side, many of the same themes were repeated as the employee survey, but the focus groups had some different responses. The employer surveys suggested attitudes against bike and car share programs, as well as finding out more about the potential programs and incentives available. The focus groups were generally excited about those possibilities, albeit with some skepticism about how the bike and car share programs would work. In terms of the alternative commute options, emergency ride home program and other potential programs and incentives, the focus groups were much more excited and wanting more than what the individual employer surveys suggested. However, all groups showed a lack of knowledge about these programs; this suggests that more direct marketing efforts, case studies as advertising, and investment in pilot programs with parallel marketing may be good ways to gain more use of these options. Some large employers and municipalities have programs in place across the spectrum of alternative commute and intraday options; many are barred from participating as strategic partners (Kaiser Permanente may be an exception to this). Telecommuting was something many employers use as a way of flex scheduling with employees; this links to employees choosing not to commute at all if possible. Intraday requirements were broad and showed that there are many businesses in Marin that have employees moving around Marin County for work daily. Employers corroborated the employees in terms of how workers get to and from work: convenience; cost; reliability; and time. All those comments point to incentives for no commute (and telecommute in specific) or driving alone. In terms of bike and car share programs, concerns over liability and actual demand for the intraday options were consistent, skeptical themes.

## *Recommendations*

1. Contact small and medium-sized businesses through chambers of commerce, where chambers become the champions of these programs.
  - a. Hold educational, sign-up, “pizza party” sessions with chamber CEOs to provide them with information for their members;
  - b. Advertise the benefits of cultural change around the way people use transportation both as commuters and intraday trips using local business examples;
  - c. Follow up with and find stories of how small and medium-sized businesses were more productive, reduced costs or both as a result of using the alternative commute program(s); and
  - d. Advertise these stories as tangible reasons to use the programs.
2. Investigate and pilot a telecommute program that involved commuting
  - a. Look to maximize public transportation occupancy rates;
  - b. Find a wifi partner (ATT, Verizon, Comcast) that wants to advertise a “green” initiative, and get people working on the buses and ferries with more speed and convenience; and
  - c. Advertise the productivity and “fun” aspects of making that move to commuting using a public transportation option.
3. Pilot a third-party car share program in downtown areas of San Rafael, Corte Madera, Sausalito
  - a. Lyft, Zipcar, Get Around, etc., are third-party providers;
  - b. Allows pilot program to take place with private provider; and
  - c. Bike share maybe in Corte Madera, but looks like it will be tricky elsewhere (mall provides diverse options of employees and uses and Corte Madera relatively flat geography).