January 20, 2015

To Palo Alto City Planning Staff/ Planning and Transportation Commissioners:

Thank you for all of the work that you have put into the downtown cap study, and for kicking off the work for a Transportation Management Authority.  We think that both initiatives will be helpful for Palo Alto residents and businesses.

There have been repeated calls by Council, the Planning and Transportation Commission, and City Staff to get more data related to downtown employment.  As a result, several large downtown employers—Survey Monkey, RelateIQ, and Palantir—have come together to provide our data on employee numbers, density, mode share, etc., to assist you with your planning efforts.

In particular, we would like to help with the following questions:
- "employment intensity": how many employees we have per square foot of office space
- "parking intensity": how many parking spaces we have per square foot of office space and per employee
- employee mode share: how employees get to work
- employee local spend: how much local employees contribute to the local economy

Some notes on the data below:

**Data sources:** there are three main data sources:
- a survey that we conducted from Nov 18-Jan 8 (with a total of 759 respondents out of our combined 1186 local staff)
- non-survey data (actual number of staff, square footage of office space, and parking spaces in Palo Alto) reported by facilities staff at each company
- spot checks (by security staff) of unoccupied parking spaces to determine capacity utilization

 **Baseline data—employees and space utilization:**

| Metric | Total |
|---|---|
| Total employees (#) | 1088 |
| Total contractors(#) | 98 |
| Total workers (#) | 1186 |
| Total office space (SQFT) | 270,725 |
| *SQFT/head* | 228 |

This metric likely somewhat overstates employee density.  For example, Survey Monkey has a policy whereby all engineers work from home 1 day/week (so the actual number of people in the office on any given day may be lower).  Palantir's business model (a large amount of development work performed at client site) similarly means that many Palo Alto-based employees would not be in the local office on any given day.

**Baseline data—parking:**

*Note: the following data excludes RelateIQ's parking utilization rates.*

| Metric | Total |
|---|---|
| Surface parking spaces | 381 |
| In-building parking spaces | 242 |
| **Total parking spaces** | **623** |
| Office SQFT/parking space | 434 |
| Capacity utilization | 67% |
| *Daily cars parked* | *390* |
| *Cars/employee* | *0.37* |

The number of cars/ employee (0.37) suggests a 37% mode share for drivers. The capacity utilization rate (67%) suggests that many employees regularly drive at least one day per week but fewer than five days per week. These numbers roughly correlate with the mode share survey data below.

**Survey data: respondent home location**
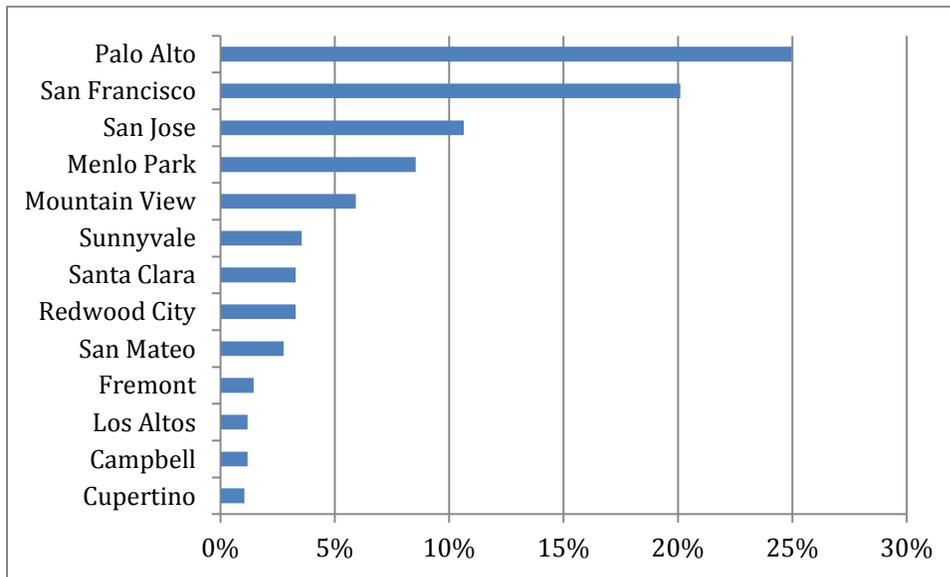


*Palo Alto was the most common home zip code (25%), followed by San Francisco (20%) and San Jose (11%). Significant proportion of employees also lived in neighboring cities: Menlo Park (9%) and Mountain View (6%).*

**Survey data: Mode share (mode by number of days/week used)**

|  | 5 or more | 4 | 3 | 2 | 1 |
|---|---|---|---|---|---|
| Walk | 102 | 15 | 14 | 17 | 30 |
| Bike | 43 | 23 | 22 | 27 | 31 |
| Caltrain | 157 | 51 | 22 | 22 | 46 |
| Bus or other public tra | 13 | 3 | 0 | 3 | 13 |
| Carpool | 16 | 8 | 9 | 22 | 28 |
| Car (individual) | 226 | 37 | 38 | 43 | 95 |

*n= 761 responses*

We looked at the total number of trips generated by multiplying each mode by the number of days the respondent reported using that mode). This generates the "total share"; individual cars account for 38% of total trips.

| Mode | Total share |
|---|---|
| Walk | 16% |
| Bike | 11% |
| Caltrain | 28% |
| Bus or other public transportation | 2% |
| Carpool | 5% |
| Car (individual) | 38% |

**Survey data: Mode share by home zip code**

| % of overall days (traveling | Local | San Francisco/ Peninsula | San Jose | South Bay-Non San Jose | East Bay |
|---|---|---|---|---|---|
| *Walk* | 26% | 7% | 5% | 3% | 4% |
| *Bike* | 19% | 5% | 0% | 1% | 1% |
| *Caltrain* | 10% | 64% | 33% | 14% | 5% |
| *Bus or other public transpor* | 1% | 6% | 2% | 0% | 4% |
| *Carpool* | 5% | 1% | 7% | 13% | 9% |
| *Car (individual)* | 38% | 17% | 53% | 70% | 76% |

Mode share is obviously highly dependent on where the respondent is traveling from. Individual car share is very high in places with poor Caltrain access. Proximity to work (which allows for walking and biking) and access to Caltrain are two major factors in determining mode share.

**Survey data: Employee spend**

One of the main reasons for businesses to be located in Palo Alto is that our employees like to be in a "real city". They like to go to local restaurants and bars, stay in interesting hotels, and be a part of a community.

Our employees are major patrons of downtown services. 78% go to restaurants and bars at least one day per week, while 65% go to café and specialty drink shops at least one day per week.

| Category of spend | % at least 1x/week |
|---|---|
| Restaurants and Bars | 78% |
| Cafes and Specialty Drink Shops | 65% |
| Grocery Stores | 43% |
| Retail/Shopping | 40% |
| Health and Wellness Services | 25% |
| Professional Services (legal, financial, etc.) | 7% |

We additionally asked employees how much they spent per week on different categories of services.  Again, restaurants and bars came out on top with $50/week, with grocery close behind at $48/week.

| Category of spend | $/week |
|---|---|
| Restaurants and Bars | 50 |
| Cafes and Specialty Drink Shops | 19 |
| Grocery Stores | 48 |
| Retail/Shopping | 39 |
| Health and Wellness Services | 30 |
| Professional Services (legal, financial, etc.) | 24 |

**We are happy to continue to collect data and help the city in your planning efforts.**

**In the meantime, please do let us know if we can answer any of your questions or be helpful in any way.**

**Best regards,**

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