CENTRAL EL CAMINO REAL MULTIMODAL PLAN

Appendix E

City of San Mateo Business Survey and Parking Analysis

Fehr & Peers

Memo

Date: August 14, 2026

To: Jay Yu and Ella Phillips, City of San Mateo

CC: Cassie Halls and Asiya Patel, SamTrans

From: Jocelyn Wu, Kevin Zamzow-Pollock, and Erin Ferguson, PE, Fehr & Peers

Subject: San Mateo El Camino Real Parking Business Survey

Introduction

El Camino Real is a major commercial corridor in San Mateo, home to a diverse mix of retail, service, restaurant, and office uses that rely on convenient access for both employees and customers. As the county-wide Grand Boulevard Initiative explores a range of potential street redesign options - including long-term changes to parking, transit, walking, and biking infrastructure - understanding how local businesses currently operate and what they prioritize is a critical first step.

To support this effort, the City of San Mateo conducted a survey of businesses along El Camino Real to better understand how they view parking, transportation, and access needs in the corridor. In addition, the survey captures businesses' understanding of existing travel patterns, including how employees commute to work and how customers typically access products and services. The following memorandum provides a summary of the data collected and the findings from the analysis.

Data Collection & Methodology

In July 2026, the City of San Mateo surveyed businesses along El Camino Real in San Mateo, from Peninsula Avenue to North Road. Over 120 businesses along the corridors were surveyed, of which 79 responded. Surveys were conducted by mail, online, and in-person. The list of survey questions is below; the full survey instrument can be found in **Attachment A**.

1. What kind of business is this?
2. For Employees: How do they typically commute to work?
3. For Customers: How do customers typically access or retrieve your products/services?
4. How long do customers typically spend here?
5. How important is on-street customer parking on El Camino Real to your business today?
6. Please rank the following from most important (1) to least important (5): More Transit Stops, Wider Sidewalks, Nearby Parking, Better Bike Access, Access for Delivery Vehicles.
7. If on-street parking on El Camino Real was relocated to make more space for people walking, biking, and taking transit, what questions or concerns would you want addressed?

Survey Results

Types of Businesses

Survey respondents were primarily retail, service, and food establishments, together representing 81% of responses. The remaining 19% was spread across other business categories, including office, banking, and more. The high number of service and food establishments imply longer customer stays and more sustained parking demand if customers choose to drive. See **Table 1** for more detail on business types.

Table 1: Business Types Among Survey Respondents

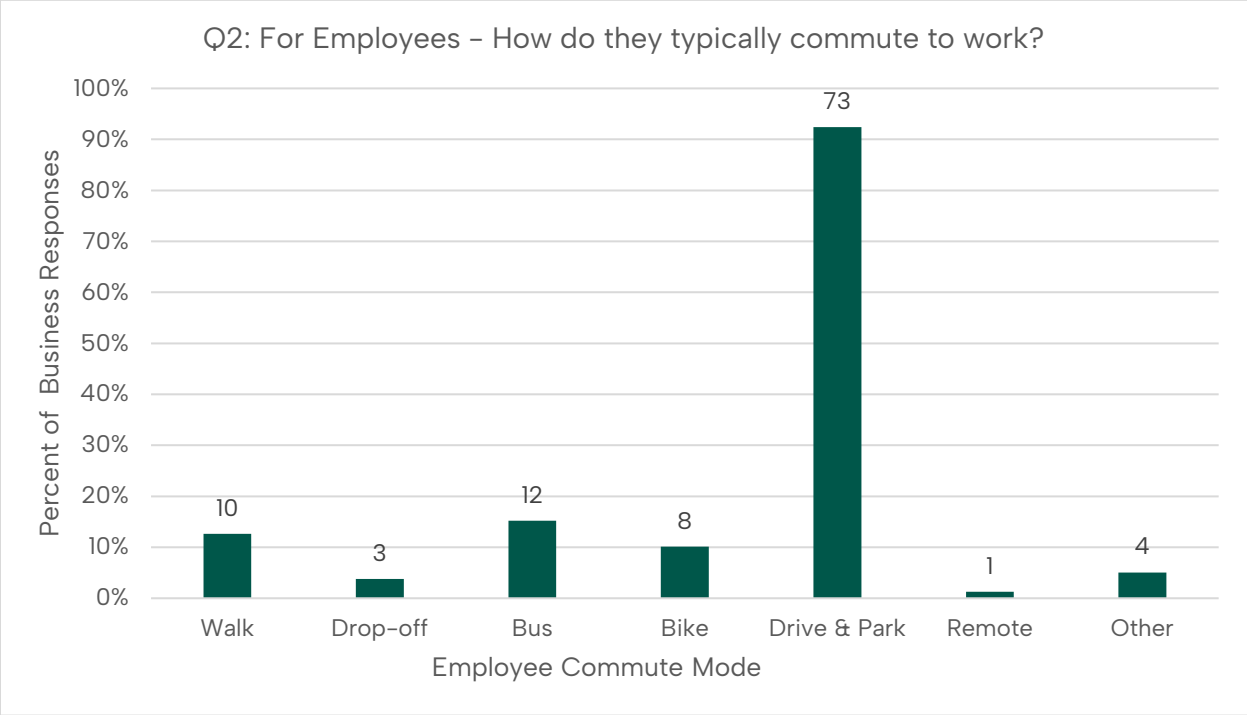
Type of Business	Number of Respondents	% of Respondents
Retail	24	30%
Service	23	29%
Restaurant/Food	17	22%
Office	6	8%
Banking	4	5%
Auto	1	1%
Senior Living	1	1%
Entertainment	1	1%
Church	1	1%
Health Care	1	1%
Total	79	100%

Source: City of San Mateo, 2026

Employee Commute Patterns

When asked how employees typically commute to work, the vast majority of businesses report that employees drive and park (92%). Just 15% of businesses report employees take the bus, 13% report employees walk, and 10% report employees bike. Since this was a select-all-that-apply question, respondents could select more than one option, so percentages sum to more than 100%. Please see **Figure 1** for more detail on employee commute responses.

Figure 1: Employee Commute Mode

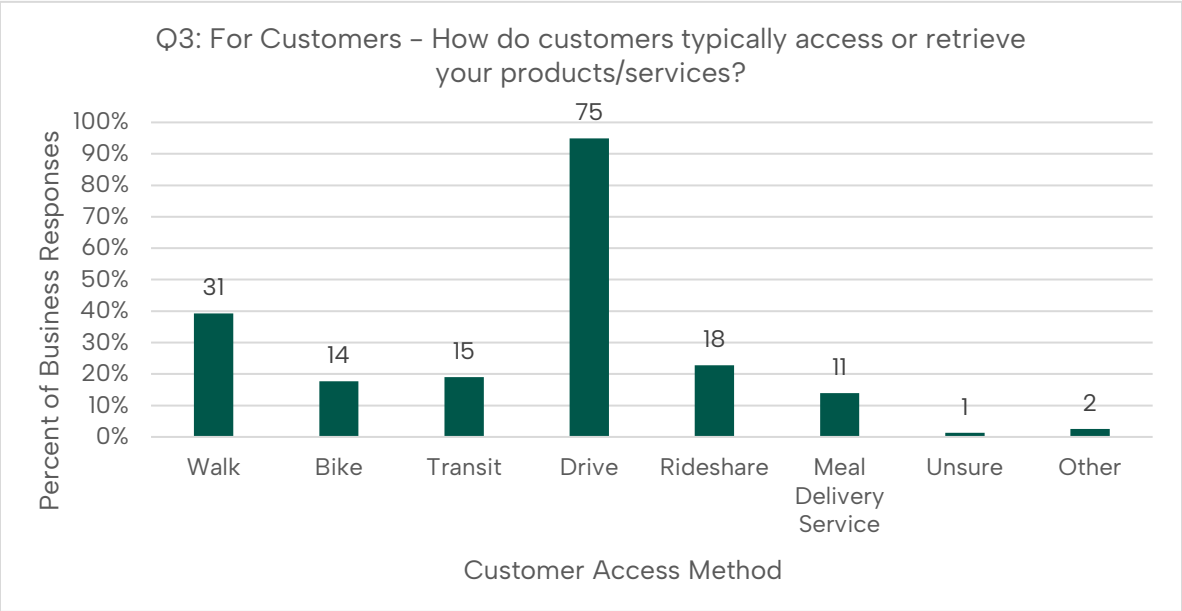


Source: City of San Mateo, 2026

Customer Access Patterns

Similarly, businesses report that their customers primarily drive to access their products and services (95%). However, survey responses also indicate a wider range of other transportation modes for customers compared to employees, with 39% of businesses reporting customers walking, 23% reporting customers using rideshare, 19% reporting customers taking transit, and 18% reporting customers biking. Additionally, 14% of businesses report that customers use meal delivery services. As with employee commute, this was a select-all-that-apply question, so percentages sum to more than 100%. Please see **Figure 2** for more detail on customer access responses.

Figure 2: Customer Access to Businesses

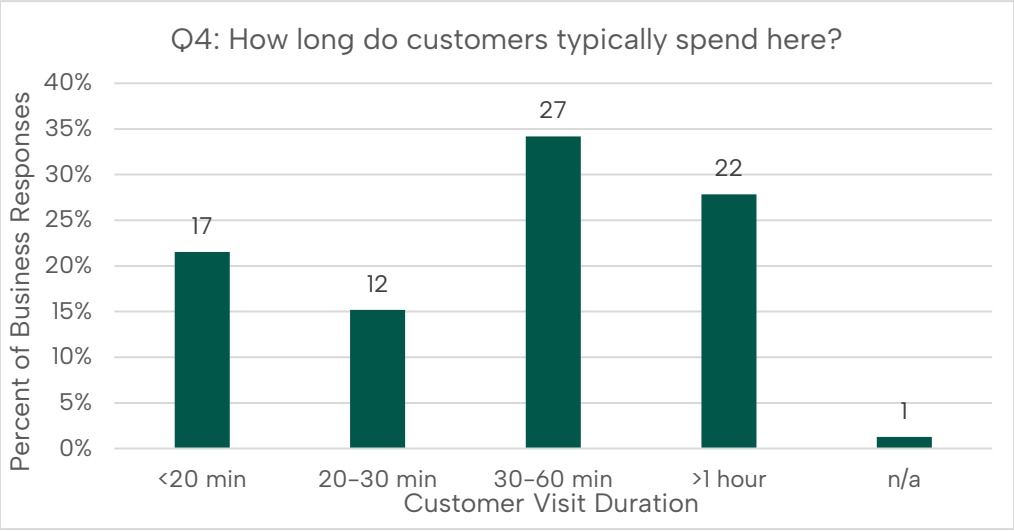


Source: City of San Mateo, 2026

Customer Visit Duration

Over 60% of businesses report customers stay for 30 minutes or longer. Only 22% of businesses report customers spending less than 20 minutes and 15% report customers spending 20–30 minutes. This suggests that, for many businesses along El Camino Real, customer visits tend to be longer in duration rather than quick stops, indicating sustained parking demand. However, there may still be demand for short-term parking in certain locations. See **Figure 3** for more detail on customer visit duration responses.

Figure 3: Customer Visit Duration

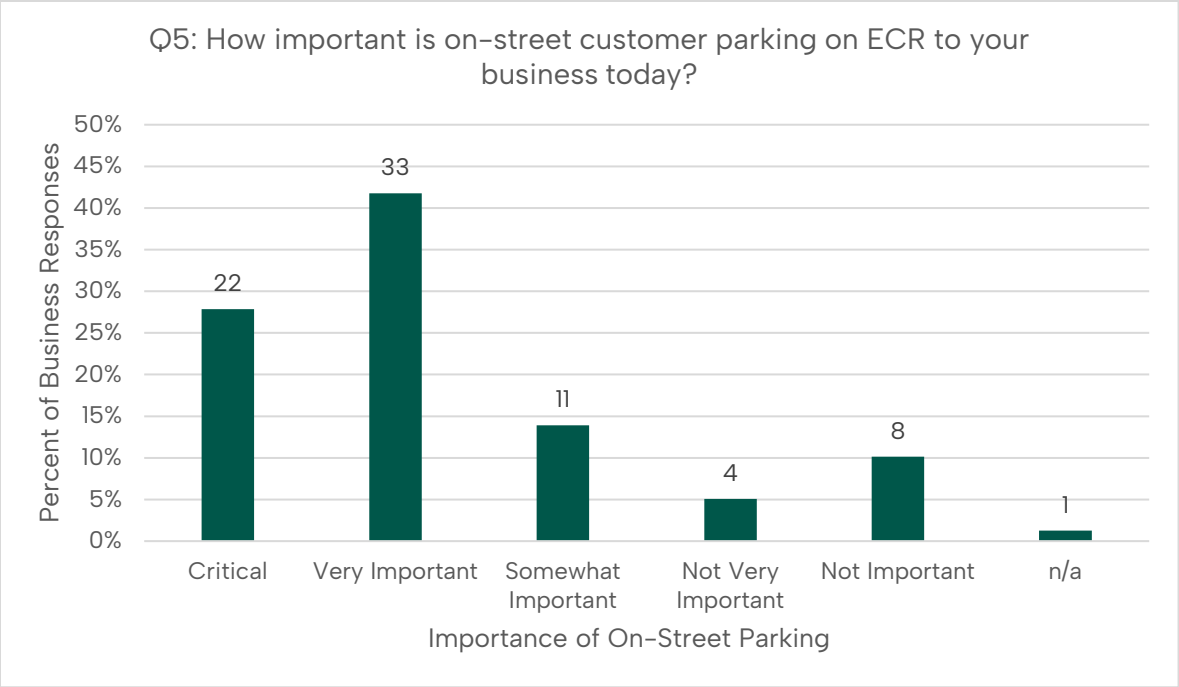


Source: City of San Mateo, 2026

Importance of On-Street Parking

When asked how important on-street customer parking on El Camino Real is, 70% of businesses replied that it was Very Important or Critical, with another 14% reporting it was Somewhat Important. Only 15% of businesses reported that on-street customer parking on El Camino Real was Not Important or Not Very Important. These responses indicate the businesses along El Camino Real value on-street parking highly and view it as very important to the success of their business. See **Figure 4** for more detail on the importance of on-street parking to businesses.

Figure 4: Importance of On-Street Parking



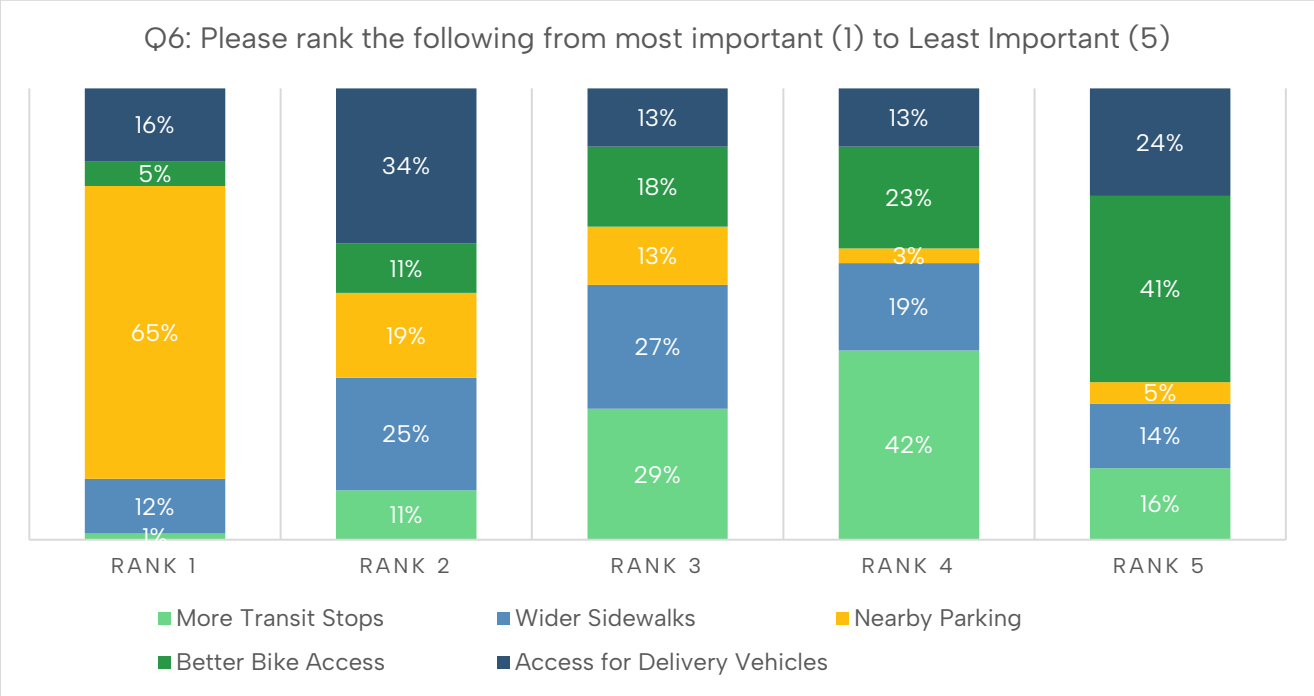
Source: City of San Mateo, 2026

Business Priorities for Corridor

When asked to rank El Camino Real corridor improvements from most important (1) to least important (5), businesses highlighted Nearby Parking as a clear priority, with 65% of businesses ranking it most important. Access for Delivery Vehicles (34%) and Wider Sidewalks (25%) were most frequently ranked second priority, indicating these are also valued highly. In the middle of the ranking, More Transit Stops (29%) and Wider Sidewalks (27%) were most common, suggesting these fall into a middle tier of importance for businesses. On the lower end of the scale, More Transit Stops was most frequently ranked second least important (42%), and Better Bike Access was most frequently ranked last (41%), making it the improvement businesses consistently valued least.

Taken together, parking, delivery access, and wider sidewalks are the dominant concerns for businesses along the corridor, while investments in bike infrastructure and transit stops are seen as comparatively lower priorities from a business perspective. See **Figure 5** for more detailed ranking results.

Figure 5: Business Rankings of Corridor Improvement Priorities

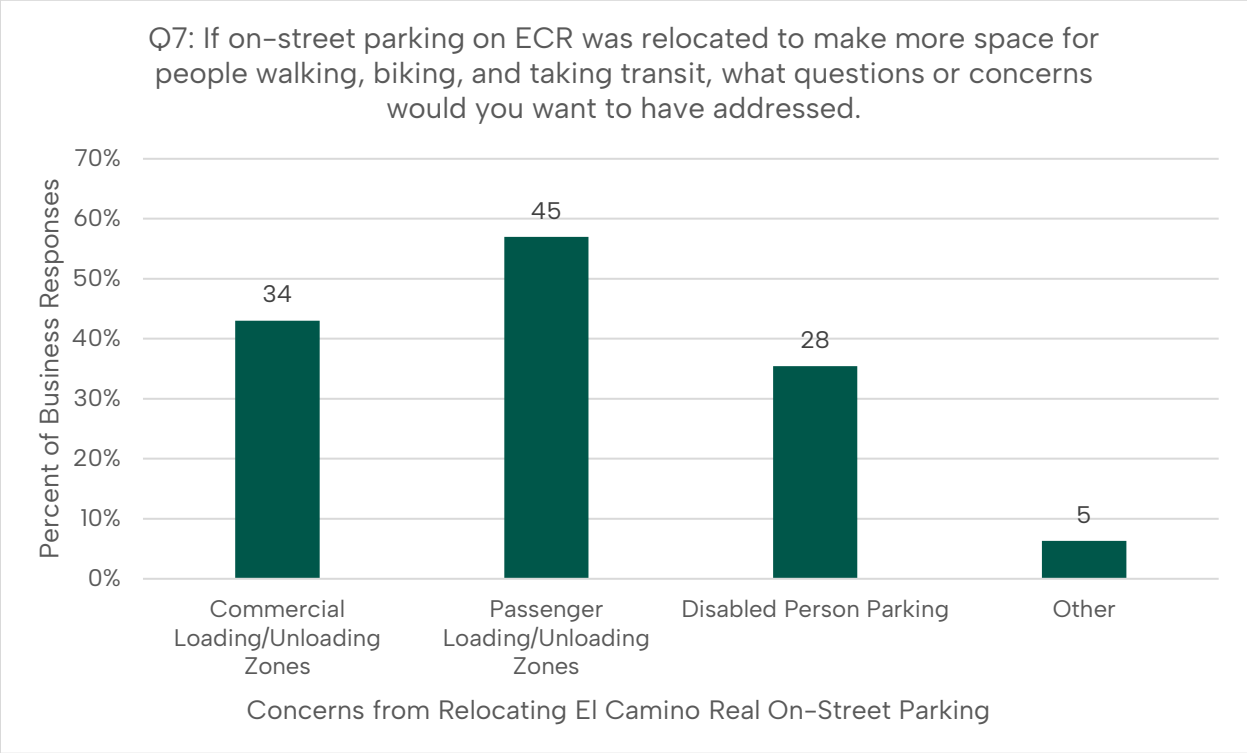


Source: City of San Mateo, 2026

Questions or Concerns about Relocating On-Street Parking

Businesses were also asked what questions or concerns they would want addressed if El Camino Real on-street parking were relocated to make room for walking, biking, and transit improvements. Businesses report their most common concern is Passenger Loading/Unloading Zones (57%), followed by Commercial Loading/Unloading Zones (43%) and Disabled Person Parking (35%). Since this was a select-all-that-apply question, respondents could select more than one option, so percentages sum to more than 100%. Some businesses left free-response comments with similar concerns, emphasizing the importance of parking and access - including questions like where else people would park, how long a redesign would take, and whether there would be any effects on traffic. See **Figure 6** for the responses regarding relocating on-street parking.

Figure 6: Questions or Concerns about Relocating On-Street Parking



Source: City of San Mateo, 2026

Summary

The survey results indicate that businesses highly value on-street parking along El Camino Real, reporting it as their top priority for the corridor and very important for employee and customer access. Businesses also report support for passenger and commercial loading space, particularly if on-street parking were removed along El Camino Real. Walking is viewed as an important mode of access for customers and wider sidewalks appear valued as a corridor priority. However, biking and transit are not perceived to be important modes of access and facilities for them are not high priorities for businesses.

Attachment A: Business Survey Mailer

CITY OF SAN MATEO
PUBLIC WORKS DEPARTMENT
330 WEST 20TH AVENUE
SAN MATEO, CALIFORNIA
94403-1388

CENTRAL EL CAMINO REAL BUSINESS SURVEY

Return by JULY 10, 2026.

Online Survey

English

Spanish

Simplified Chinese

Central El Camino Real Business Survey: Help Us Plan Improvements!

Business Name: _____

1) What kind of business is this?

O Restaurant/Food O Retail O Service

O Office O Other: _____

2) FOR EMPLOYEES: How do they typically commute to work? Please select all that apply.

O Walk O Drop-off O Bus O Bike

O Drive & Park O Remote O Other: _____

3) FOR CUSTOMERS: How do customers typically access or receive your products/services? Please select all that apply.

O Walk O Bike O Transit O Drive

O Rideshare (Lyft/Uber) O Meal Delivery Service

O Unsure O Other: _____

4) How long do customers typically spend here?

O <20 min O 20-30 min

O 30-60 min O >1 hour

5) How important is on-street customer parking on El Camino Real to your business today?

O Critical O Very Important

O Somewhat Important O Not Very Important

O Not Important

6) Please rank the following from most important (1) to least important (5):

____ More Transit Stops ____ Wider Sidewalks

____ Nearby Parking ____ Better Bike Access

____ Access for Delivery Vehicles

7) If on-street parking on El Camino Real was relocated to make more space for people walking, biking, and taking transit, what questions or concerns would you want to have addressed. Please select all that apply.

O Commercial Loading/Unloading Zones

O Passanger Loading/Unloading Zones

O Disabled Person Parking O Other: _____

Submit your feedback by folding this sheet with your comments on the inside and taping it closed. No postage necessary.
Please submit your feedback by **July 10, 2026.**
[Address]

Central El Camino Real Plan

About the Central El Camino Real Plan

The City of San Mateo is working with SamTrans to develop the Central El Camino Real Plan to create a safer, more accessible, and vibrant corridor for businesses, residents, and visitors.

Project Goals

- Create a cohesive, locally defined vision that improves the walking, biking, rolling, driving, and transit experience on El Camino in San Mateo, Belmont, San Carlos, and Redwood City
- Enhance safety for all users traveling on El Camino, addressing major safety issues as part of the county's High-Injury Network
- Identify a transportation improvement option that meets both the regional and local needs for El Camino

Feedback

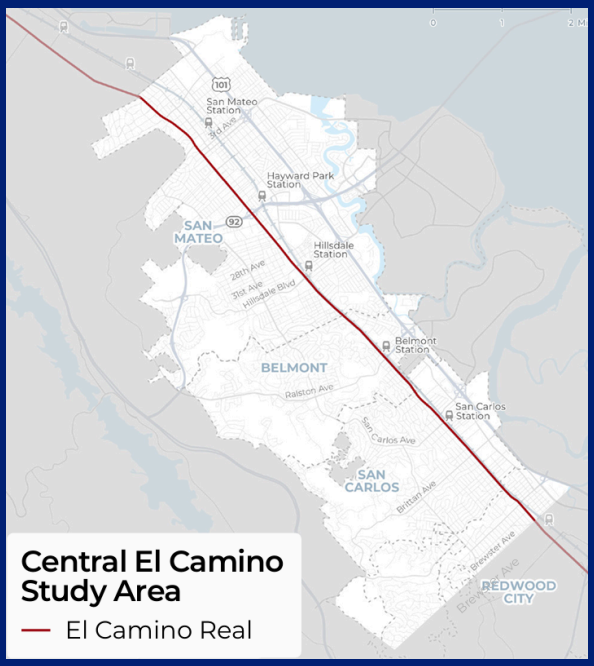
Help us plan improvements by completing the survey on the back of this card OR online.

Please fold this sheet with your comments inside and tape closed. No postage necessary. Respond by **July 10, 2026.**

Questions

Visit samtrans.com/CentralElCamino for more information.

Project Area



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BUSINESS REPLY MAIL

FIRST-CLASS MAIL PERMIT NO. 43 SAN MATEO, CA

POSTAGE WILL BE PAID BY ADDRESSEE

DEPARTMENT OF PUBLIC WORKS
CITY OF SAN MATEO
330 W 20TH AVE
SAN MATEO, CA 94403-9803

Fehr & Peers

Memo

Date: August 14, 2026

To: Jay Yu and Ella Phillips, City of San Mateo

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From: Jocelyn Wu, Kevin Zamzow-Pollock, and Erin Ferguson, PE, Fehr & Peers

Subject: San Mateo El Camino Real Parking Analysis

Introduction

At the request of the City of San Mateo, Fehr & Peers evaluated parking inventory and utilization on and in the vicinity of El Camino Real for both on-street parking spaces and publicly accessible garages. The purpose of this evaluation was to assess the ability of surrounding parking spaces to absorb parking demand from El Camino Real in the case of parking reduction on El Camino Real. The current county-wide Grand Boulevard Initiative is exploring a range of potential street redesign options for long-term implementation on El Camino Real, some of which may impact the number of available parking spaces. This analysis assumes all parking would be eliminated along El Camino Real to assess the highest affect on neighboring parking. However, this is for the purpose of analysis; no final determinations have been made about the number of parking spaces to be removed or maintained. The following memorandum provides a summary of the data collected and the findings from the analysis.

Data Collection and Methodology

Study Area

The study area for this analysis is centered on El Camino Real in San Mateo and includes the area between Santa Inez Avenue and North Road.[1] Within this area, data was collected for both on-street and off-street parking.

On-street data were recorded for cross streets and parallel streets within one block of El Camino Real. Off-street data were recorded for surface lots within one block of El Camino Real and larger parking garages within three blocks. Private off-street lots for the exclusive use of residents or employees were excluded from the data collection, but private lots for business customers were included. **Figure 1** illustrates the project area. Orange segments indicate the on-street locations where data was collected, while blue represents the off-street facilities (lots and garages).

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[1] El Camino Real and surrounding streets in San Mateo north of Santa Inez Avenue were not included in the study area because that stretch of El Camino Real does not have any existing on-street parking.

Figure 1. El Camino Real from Santa Inez Ave to North Road (Project Area)

Collection Periods

To capture how parking demand shifts over the course of a typical week, field counts were conducted during three periods: a weekday midday period (Thursday, 12:00 PM), a weekday evening period (Thursday, 6:00 PM), and a weekend midday period (Saturday, 12:00 PM). At every location and time period, the parking inventory (the total number of spaces available) and occupancy were collected. The analysis incorporated multiple instances of data collection from 2024 to 2026. Downtown San Mateo was collected in April 2024, El Camino Real on-street parking was collected in May 2025, and the rest of the study area was collected in April/May 2026.

Analysis

Segmentation

The project area was separated into ten segments to organize the analysis. Each segment spans approximately a quarter to a half mile, with boundaries drawn around natural breaks in the corridor, such as major cross streets or highway interchanges. Each segment encapsulates a stretch of the El Camino Real corridor with similar land use and general character to represent a realistic common parking catchment area. The list of segments are:

- Santa Inez Avenue - Baldwin/Baywood Avenue
- Baldwin/Baywood Avenue - 5th Avenue
- 5th Avenue – Aragon Boulevard/Hayward Avenue
- Aragon Boulevard/Hayward Avenue- Barneson/14th Avenue
- Barneson/14th Avenue - Highway 92
- Highway 92 - 22nd Avenue
- 22nd Avenue - 28th Avenue
- 28th Avenue - 36th Avenue
- 36th Avenue - 41st Avenue
- 41st Avenue - North Road

Analysis Methodology

The analysis models a surrounding-area parking condition where drivers displaced from El Camino Real can park anywhere nearby, on-street or off-street, except in blocks designated under the Residential Parking Permit Program (RPPP). RPPP blocks are prioritized for permit-holding residents and were excluded from the surrounding area's available parking count.

Using the collected field data described above, the workbook compares before-and-after occupancy conditions across the surrounding street network for each of the three collection periods, simulating what occupancy would look like if existing El Camino Real parking were removed and that demand redistributed to nearby on-street and off-street spaces.

Findings

The analyzed section of El Camino Real saw 240-280 vehicles typically parked within the existing on-street parking. The surrounding on-street and off-street parking network would be able to fully absorb this demand without drawing on RPPP blocks, meaning drivers currently parking on El Camino Real could typically find alternative parking within a couple of blocks.

Additionally, across all three time periods, parking occupancy after redistribution in the surrounding area stays well below capacity – at the segment scale, the resulting occupancy is up to 73% during the weekday midday period, 70% during the weekday evening period, and 72% during the weekend midday period.

Table 1 provides more detailed results, highlighting the surrounding parking occupancy without and with parking demand from El Camino Real by segment and time period. **Attachment A** provides a visual breakdown of El Camino Real parking occupancy counts and surrounding area vacancy counts across the corridor for each time period.

Table 1. Surrounding Parking Occupancy Without and With El Camino Real Parking Demand

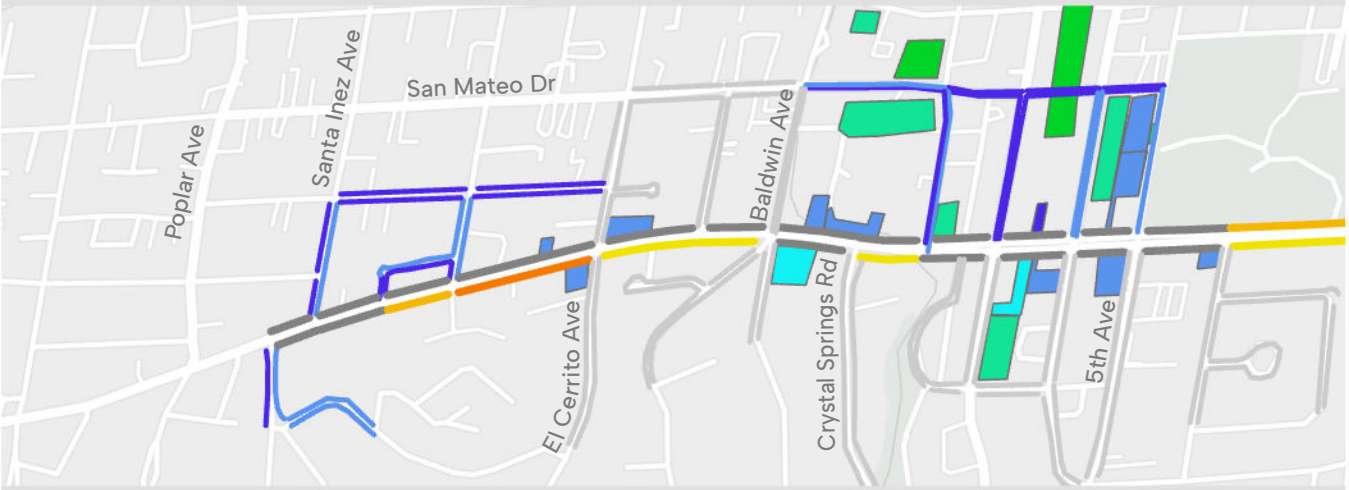
El Camino Segment	Weekday 12 PM		Weekday 6 PM		Weekend 12 PM	
	Without	With	Without	With	Without	With
Santa Inez Ave – Baldwin/Baywood	57%	67%	61%	70%	56%	64%
Baldwin/Baywood – 5th Ave	62%	63%	42%	42%	46%	46%
5th Ave – Aragon/Hayward	29%	34%	24%	30%	26%	33%
Aragon/Hayward – Barneson/14th	44%	51%	43%	48%	50%	55%
Barneson/14th – Hwy 92	52%	54%	39%	41%	48%	49%
Hwy 92 – 22nd Ave	58%	62%	54%	58%	69%	71%
22nd Ave – 28th Ave	66%	73%	56%	62%	65%	72%
28th Ave – 36th Ave	35%	35%	35%	35%	53%	53%
36th Ave – 41st Ave	54%	59%	53%	57%	59%	63%
41st Ave – North Road	42%	46%	61%	63%	55%	58%

Note: Streets designated as part of the Residential Parking Permit Program (RPPP) were not included in available on-street supply.

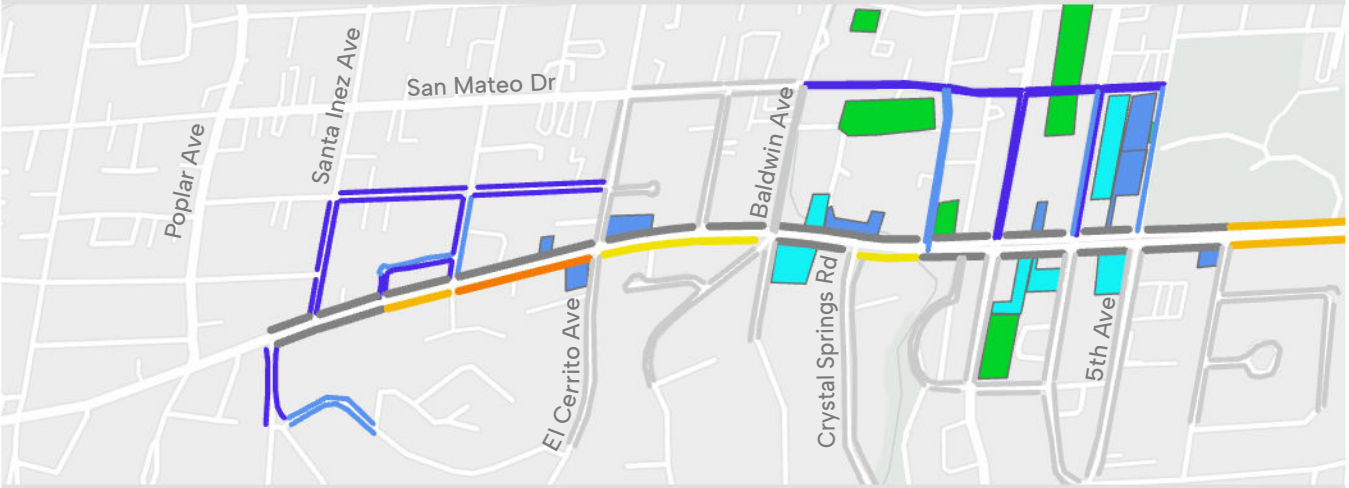
Attachment A: Parking Occupancy Maps

Segment A and B | Santa Inez Ave to 5th Ave

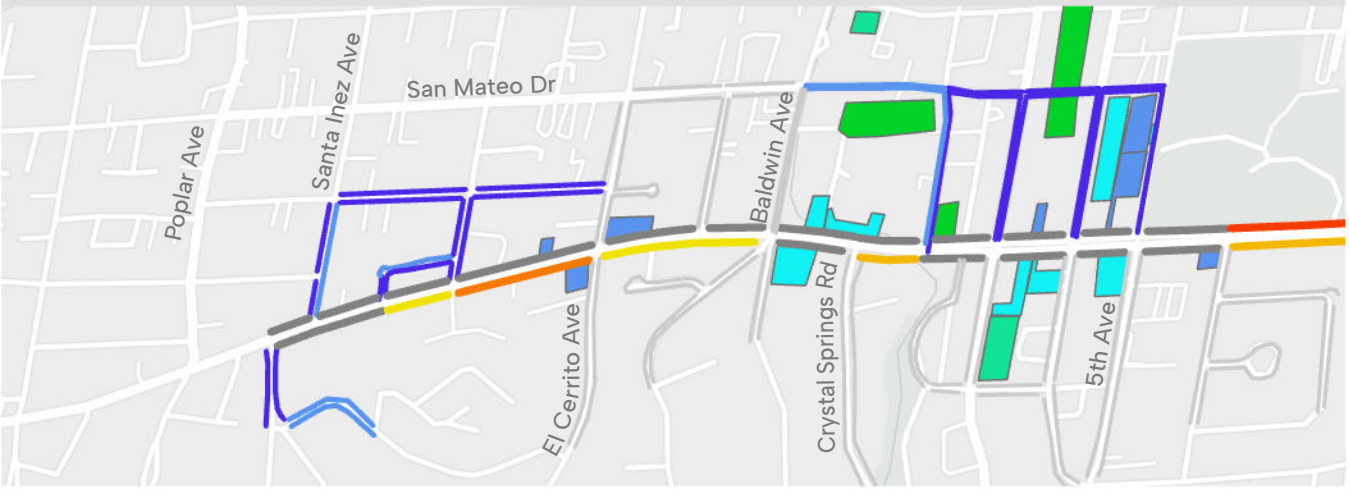
Weekday Midday



Weekday Evening



Weekend Midday



El Camino Real Parking Occupancy (Count)

- 0
- 1 - 5
- 6 - 10
- 11 - 15
- 16 - 30

Surrounding Unused Parking (Count)

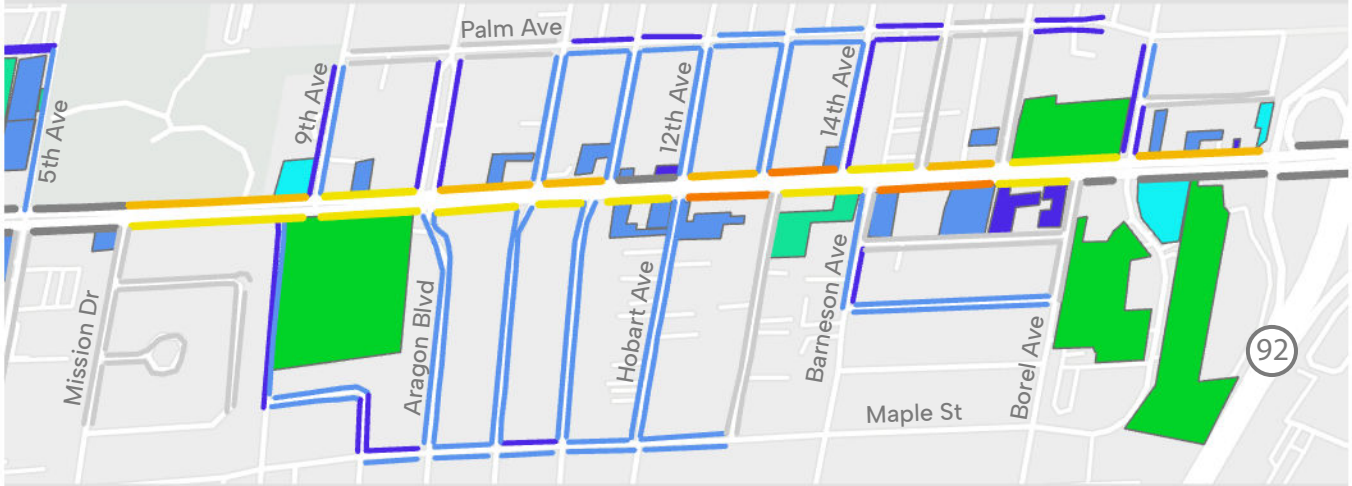
- 0 - 5
- 6 - 20
- 21 - 50
- 51 - 100
- 101 - 1000
- RPPP

0 0.1 0.2 Miles

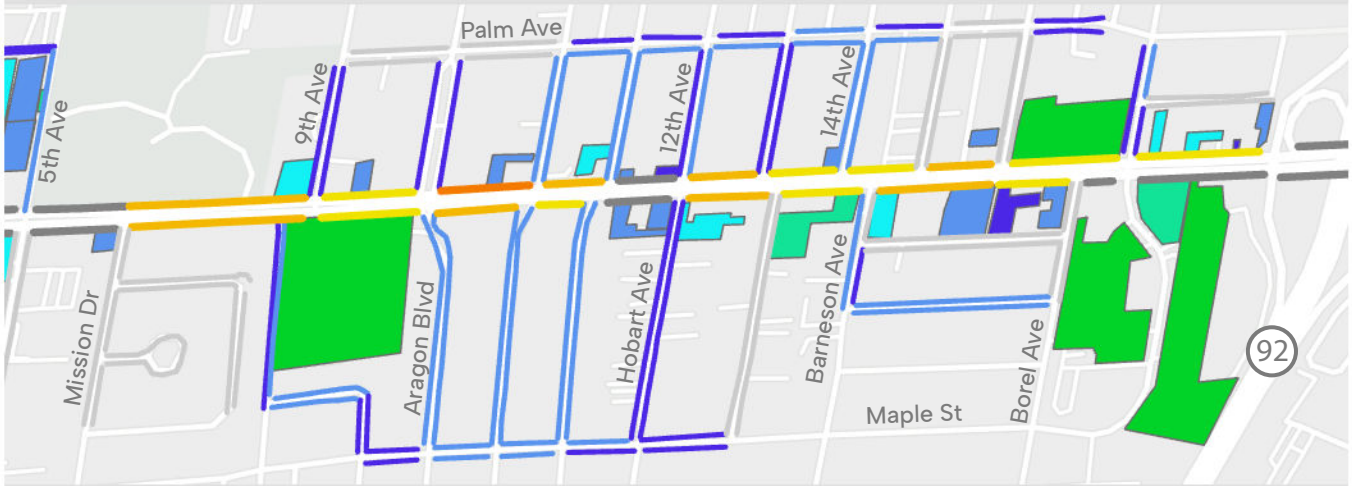
N

Segment C, D, and E | 5th Ave to Hwy 92

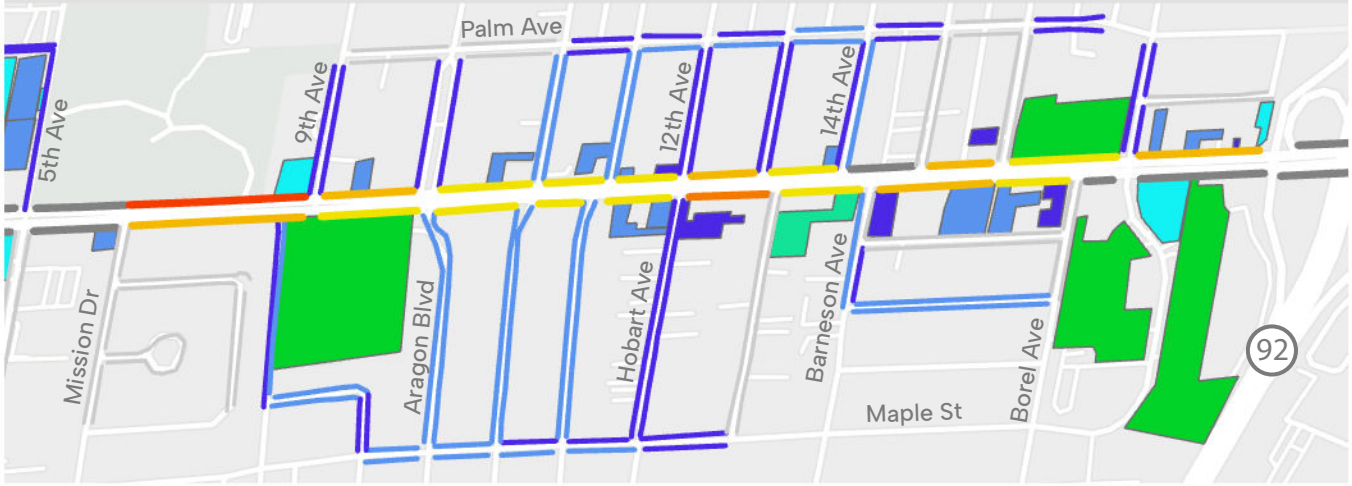
Weekday Midday



Weekday Evening



Weekend Midday



El Camino Real Parking Occupancy (Count)

- 0
- 1 - 5
- 6 - 10
- 11 - 15
- 16 - 30

Surrounding Unused Parking (Count)

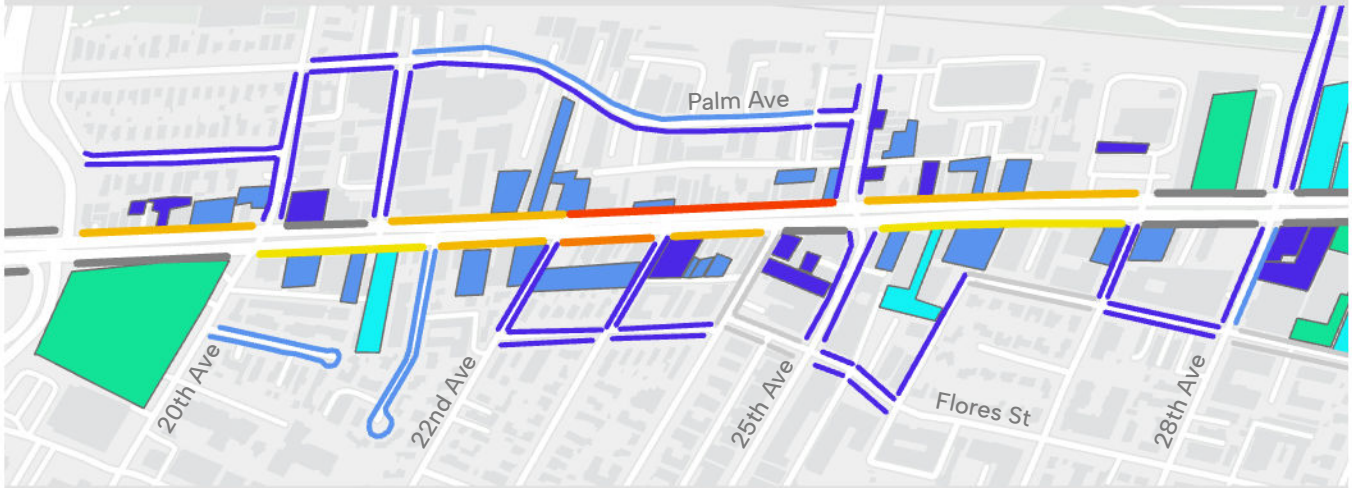
- 0 - 5
- 6 - 20
- 21 - 50
- 51 - 100
- 101 - 1000
- RPPP

0 0.1 0.2 Miles

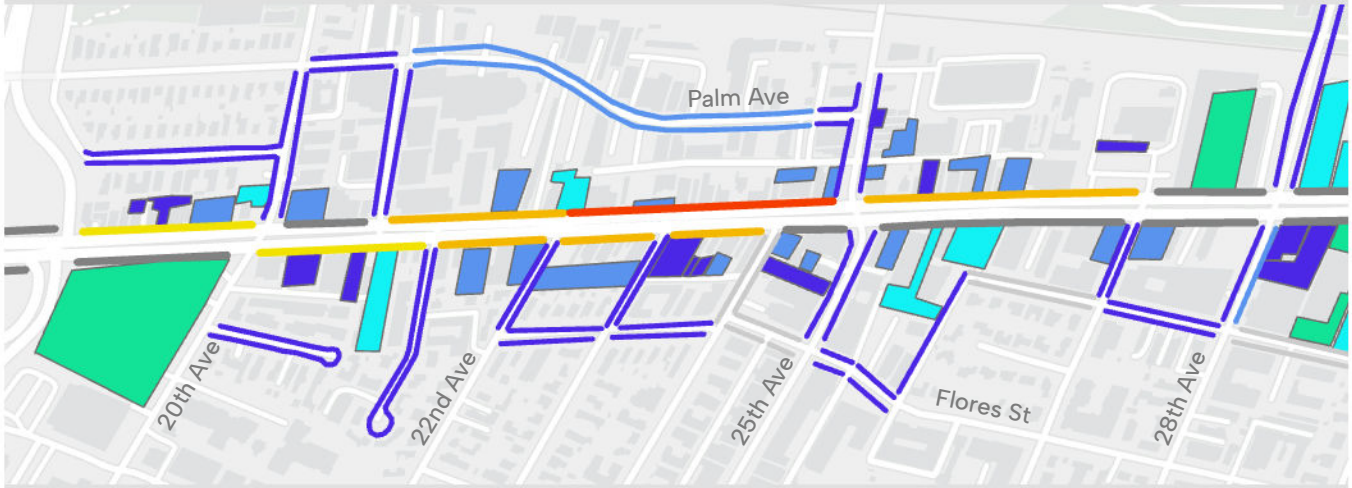
N

Segment F and G | Hwy 92 to 28th Ave

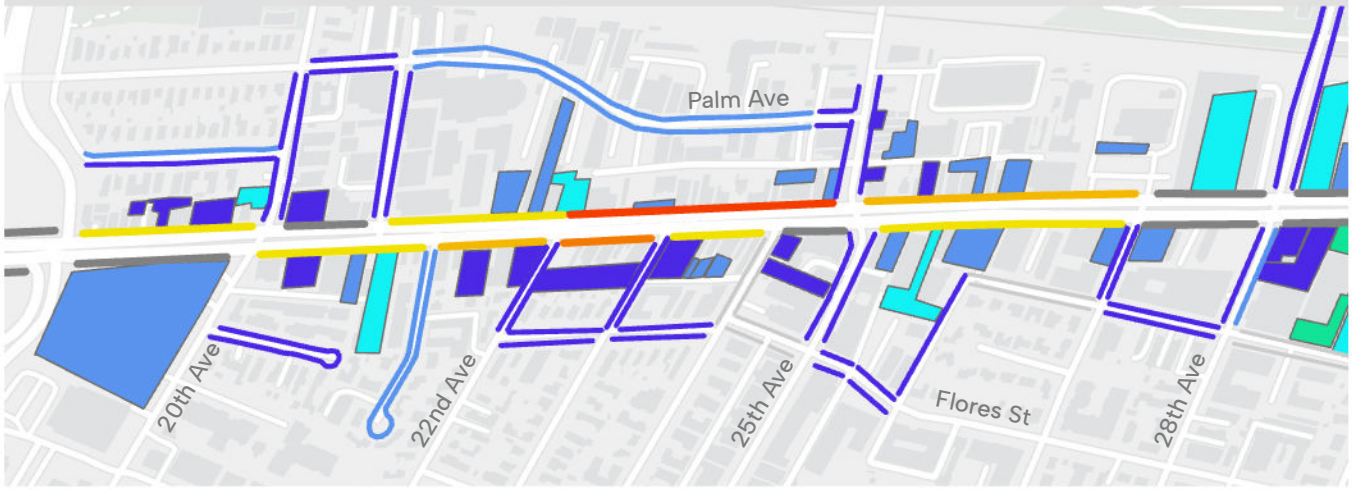
Weekday Midday



Weekday Evening



Weekend Midday



El Camino Real Parking Occupancy (Count)

- 0
- 1 - 5
- 6 - 10
- 11 - 15
- 16 - 30

Surrounding Unused Parking (Count)

- 0 - 5
- 6 - 20
- 21 - 50
- 51 - 100
- 101 - 1000
- RPPP

0 0.1 0.2 Miles

N

Segment H and I | 28th Ave to 41st Ave

Weekday Midday

Weekday Evening

Weekend Midday

El Camino Real Parking Occupancy (Count)

- 0
- 1 - 5
- 6 - 10
- 11 - 15
- 16 - 30

Surrounding Unused Parking (Count)

- 0 - 5
- 6 - 20
- 21 - 50
- 51 - 100
- 101 - 1000
- RPPP

0 0.1 0.2 Miles

N

Segment J | 41st Ave to North Rd

Weekday Midday

Weekday Evening

Weekend Midday

El Camino Real Parking Occupancy (Count)

- 0
- 1 - 5
- 6 - 10
- 11 - 15
- 16 - 30

Surrounding Unused Parking (Count)

- 0 - 5
- 6 - 20
- 21 - 50
- 51 - 100
- 101 - 1000
- RPPP

0 0.1 0.2 Miles

N