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Controller

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MEMORANDUM

TO: Sean Kennedy, Manager, Transit Effectiveness Project, SFMTA
Paul Kniha, Service Planning Intern, Transit Effectiveness Project, SFMTA

FROM: Corina Monzor, ^{WST}Wylie Timmerman, ^{HTP}Matt Podolin
City Services Auditor, City Performance Unit, Controller's Office

DATE: January 29, 2014

SUBJECT: Inner Sunset and San Bruno Corridor Survey Analysis

The Controller's Office, City Services Auditor Division (CSA), presents its analysis of the Inner Sunset and San Bruno Corridor Surveys. In addition, CSA is submitting the key findings PowerPoint presentation, the Excel file used for the analysis summary, and maps of the corridor survey locations.

Purpose/Overview

In October and November of 2013, the San Francisco Municipal Transportation Agency (SFMTA) managed the administration of an intercept survey of just under 200 people on the Inner Sunset and San Bruno corridors. The goals of the survey were to gauge the respondents' transportation and spending habits, and learn their opinions about possible streetscape and transportation improvements. These surveys were not meant to provide a comprehensive measure of the transportation use, spending patterns, or opinions of those on the corridors. They are intended to inform discussions of the habits and views of visitors to the corridors who responded to the survey.

Methodology

The SFMTA worked with the City Services Auditor (CSA) and the Office of Economic and Workforce Development to write the survey. The survey design was based on previous pedestrian intercept studies, including the 2013 SFMTA Polk Street survey and the SF Transportation Authority Geary Corridor survey. Depending on the respondent's answers, the survey was between 11 and 13 questions.

Students at San Francisco State University (SFSU) randomly approached pedestrians at five pre-established locations on each corridor; the students did not attempt to target any specific demographic groups. Their efforts resulted in a 12% response rate. The Inner Sunset surveys were conducted on October 17, 18, and 20-23. Five students in the Inner Sunset interviewed 105 people. These surveys were administered only in English. On the San Bruno corridor, surveys were conducted on November 13-15, 17, and 18. Four students interviewed 86 individuals. Some surveys in San Bruno were administered in languages other than English when students felt comfortable translating the survey during the interview. The SFSU students captured the responses on paper and then entered them into a Google form created by CSA.

What follows in Attachment A is CSA's analysis of the survey results. The other attachments are supporting documentation to the primary analysis.

Please do not hesitate to contact any member of the project team if you have questions about the analysis or supporting documentation. It has been a pleasure working with the SFMTA on this effort.

Attachments

- A. Analysis Summary
- B. Analysis Key Findings PowerPoint
- C. Survey Results Excel Document
- D. Survey Location Maps

Inner Sunset and San Bruno Corridor Survey Results Analysis Summary

Key Findings

Inner Sunset

- In the Inner Sunset, walking was the most common mode of arrival in the corridor. Half of the respondents walked to the corridor, 22% took a car, 21% took Muni, and 5% rode a bike.
- Almost 40% of those who arrived in the corridor by car reported that they visit the Inner Sunset less than once per week.
- Over 60% of the respondents supported transit-only lanes or other transit amenities. Close to one fifth of respondents were opposed.
- In the Inner Sunset, 90% of respondents who took Muni said that they were definitely willing to consider walking an additional block or two to reach a bus stop if it would mean that their ride would be faster and arrival times more reliable. The other 10% of respondents said, "It depends."

San Bruno

- Muni was the most common method of arriving at the corridor, followed by walking. Over 50% of respondents in San Bruno took Muni to the corridor, over 30% walked, and 15% drove.
- More than 50% of those who took Muni to San Bruno said they visit the corridor every day. Two thirds of those who walked to the corridor said that they visit it every day. Only 30% of those who arrived by car said they visit every day, and a similar percent said they almost never come to the corridor.
- Over half of the respondents supported transit-only lanes or other transit amenities. Just under one third were opposed.
- In San Bruno, 73% of respondents who took Muni said that they were definitely willing to consider walking an additional block or two to reach a bus stop if it would mean that their ride would be faster and arrival times more reliable. Another 17% of respondents said they were definitely not willing to consider it.

Methodology

- The survey was a pedestrian intercept survey conducted at five pre-determined locations on each corridor.
- The SFMTA worked with the City Services Auditor and the Office of Economic and Workforce Development to write the survey. It was based on prior pedestrian intercept surveys, including the 2013 SFMTA Polk Street survey and the SF Transportation Authority Geary Corridor survey.
- The survey length was between 11 and 13 questions, depending on the respondent's answers.
- The survey was conducted by students from San Francisco State University.
- The Inner Sunset surveys were conducted on October 17, 18, and 20-23. On the San Bruno corridor, surveys were conducted on November 13-15, 17, and 18.
- In the Inner Sunset, the survey had a 12% response rate and 105 people completed the survey. A total of 871 people were contacted on the corridor and 766 declined to take the survey.
- In San Bruno the intercept survey had a 12% response rate and 86 people completed the survey. A total of 707 people were contacted on the corridor and 621 declined to take the survey.
- San Francisco State University students recorded the surveys on paper and then entered them into Google Form created by the CSA.

Demographics

Below is self-reported demographic information about the survey respondents.

Inner Sunset

- All of the surveys were conducted in English
- Just under half of the respondents, 44%, do not live or work near the corridor. The slight majority of the respondents live and/or work close to the corridor.

Corridor	I live nearby	I work nearby	Both	Neither
Inner Sunset	40%	7%	9%	44%

- Those on the corridor are generally young. Those 18-29 were 32% of respondents. Those under the age of 39 made up 58% of the respondents. Respondents between the ages of 40 and 64 made up 34% of the respondents.

Corridor	18 - 29	30 - 39	40 - 49	50 -64	64 or older
Inner Sunset	32%	26%	14%	20%	8%

- Respondents were primarily White and Asian. Almost 69% of respondents identified as White while another 13% identified as Asian.

Corridor	White	Asian	Other
Inner Sunset	69%	13%	18%

San Bruno

- In San Bruno the survey was conducted in English by 85% of the respondents, in Chinese by 14%, and in Spanish by 1%.
- Just over half of the respondents did not live or work near the corridor. 36% of respondents live near the corridor.

Corridor	I live nearby	I work nearby	Both	Neither
San Bruno	36%	6%	5%	53%

- Most of the respondents were middle-aged or younger. Respondents between the ages of 18 and 29 made up 32% of the respondents and those 30 to 64 made up 64% of respondents.

Corridor	18 - 29	30 - 39	40 - 49	50 -64	64 or older
San Bruno	32%	14%	29%	21%	5%

- Respondents on the corridor had diverse racial and ethnic backgrounds. Asians were the largest group, making up 38% of respondents. A total of 19% of respondents identified as Black or African American, 16% as Hispanic or Latino, and 16% as White.

Corridor	Asian	Black or African American	Hispanic or Latino	White	Other
San Bruno	38%	19%	16%	14%	14%

Transportation Method

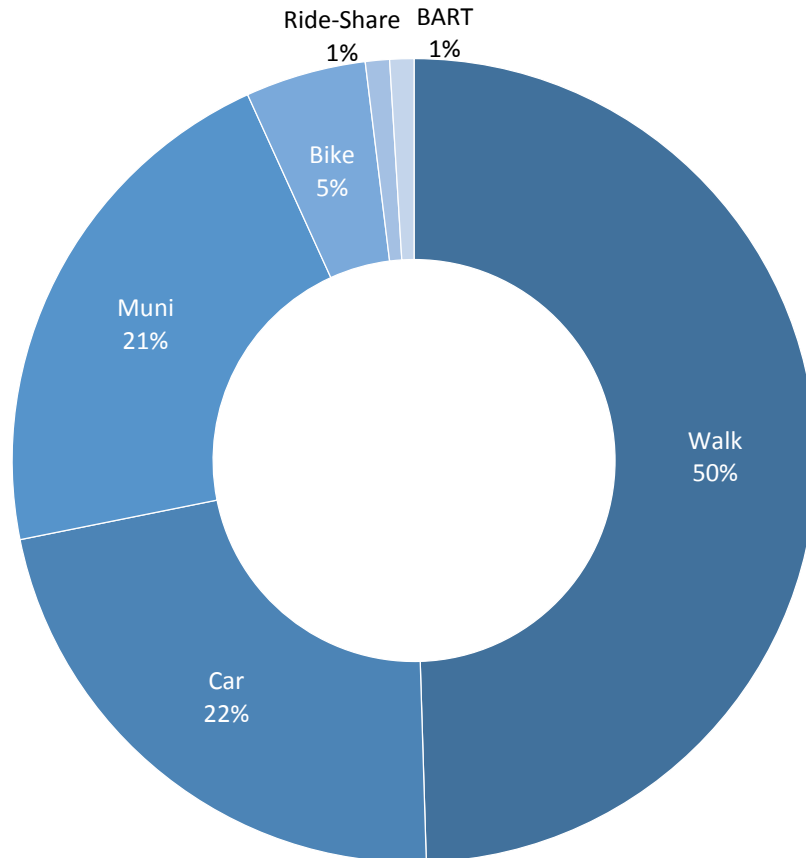
Respondents were asked about what method of transportation they used to get to the corridor.

Inner Sunset

- In the Inner Sunset, walking was by far the most common mode of arrival in the corridor, and respondents primarily arrived by a mode other than driving. A total of 78% of respondents arrived in the corridor by a mode other than private vehicle. Half of respondents walked, 22% arrived by car, and 21% took Muni.

Transportation Method	Respondents	Percent of Total
Walk	51	50%
Car	23	22%
Muni	22	21%
Bike	5	5%
BART	1	1%
Ride-sharing	1	1%

Total Respondents by Transportation Method - Inner Sunset



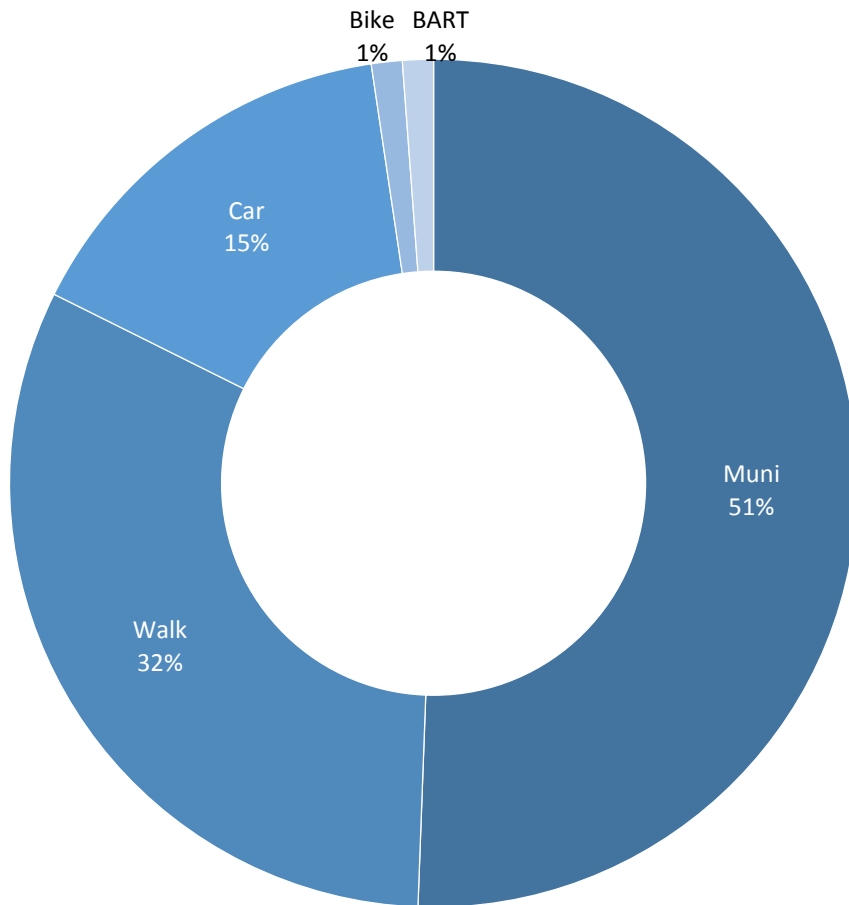
Attachment A: Analysis Summary

San Bruno

- In San Bruno, Muni was the most common method of arriving at the corridor, followed by walking. Just over half of the respondents took Muni, 32% walked, and only 15% arrived by car.

Transportation Method	Respondents	Percent of Total
Walk	43	51%
Car	27	32%
Muni	13	15%
Bike	1	1%
BART	1	1%

Total Respondents by Transportation Method - San Bruno



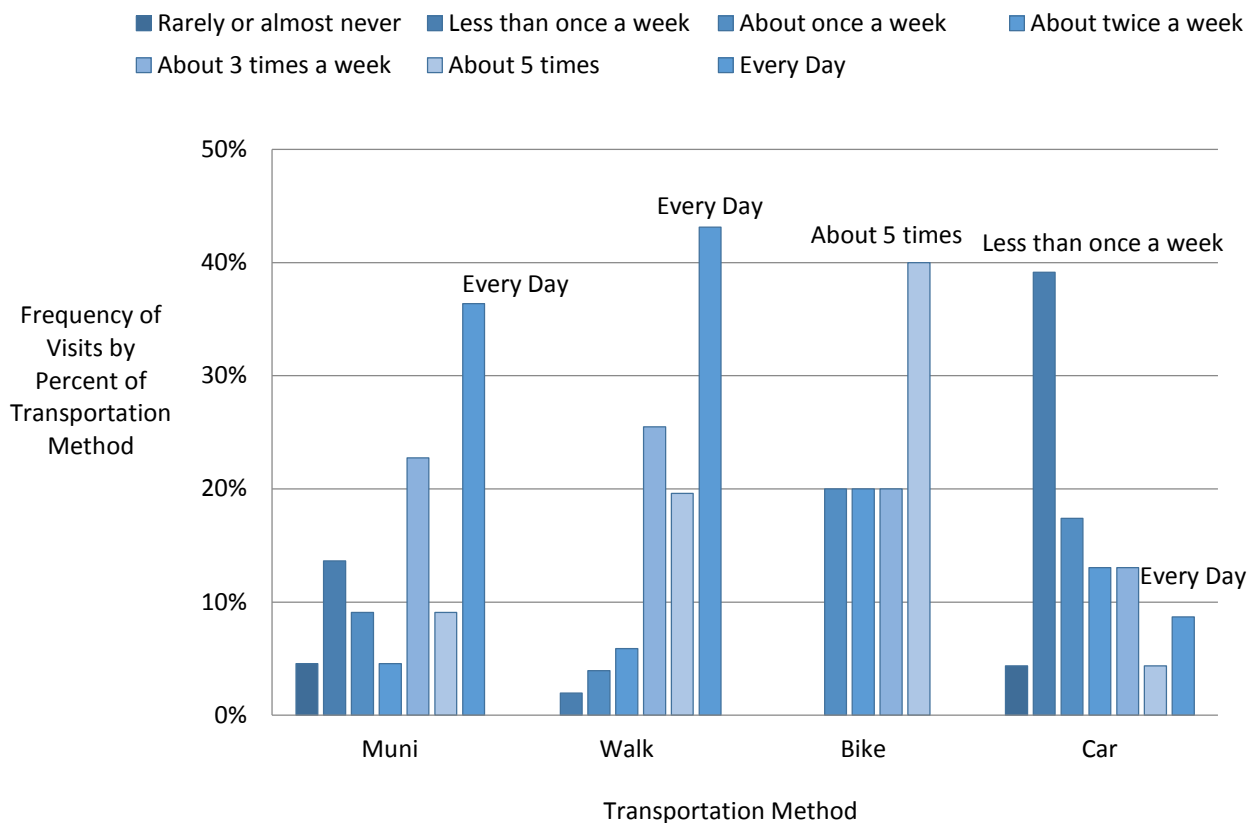
Visit Frequency and Difficulty Getting to the Corridor

Respondents were asked how often they visit the corridor in an average week and about the ease of their trip to the corridor.

Inner Sunset

- Responses for those who arrived in the corridor by BART and ride-sharing are excluded because of their small sample size.
- Those who arrived in the corridor by Muni or by walking were the most likely to be daily visitors to the corridor. Just over one third of Muni riders and 43% of those who walked reported that they visit the corridor 7 days per week. Almost 40% of those who arrived in the corridor by car reported that they visit the corridor less than once per week.

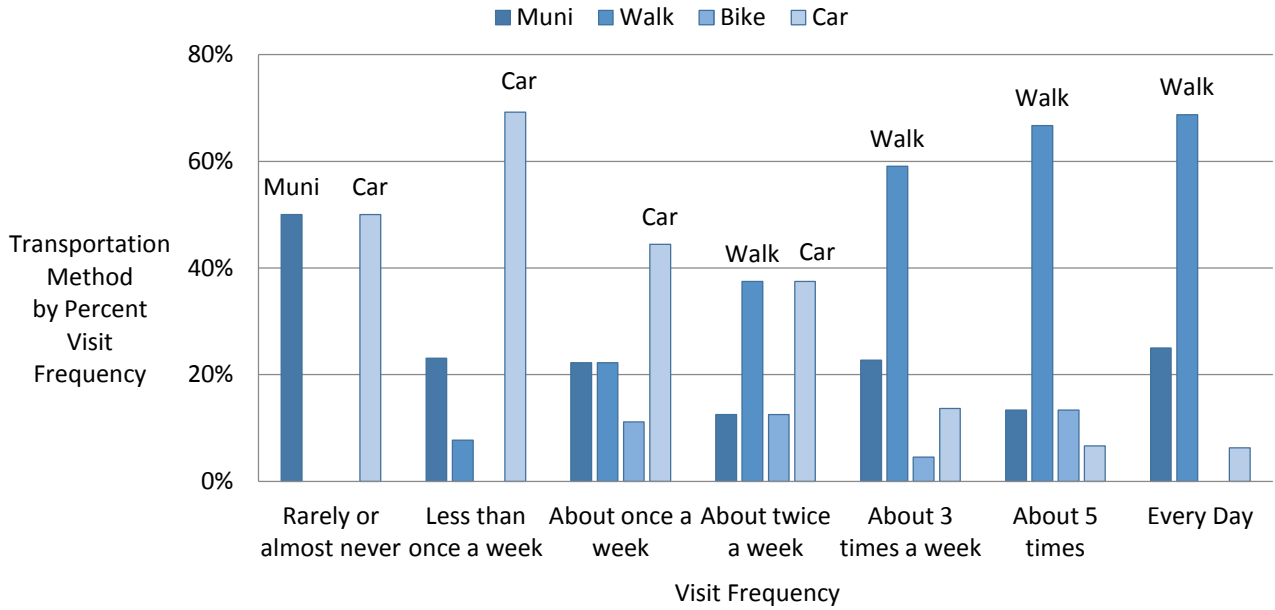
Frequency of Visits by Percent of Transportation Method - Inner Sunset



Attachment A: Analysis Summary

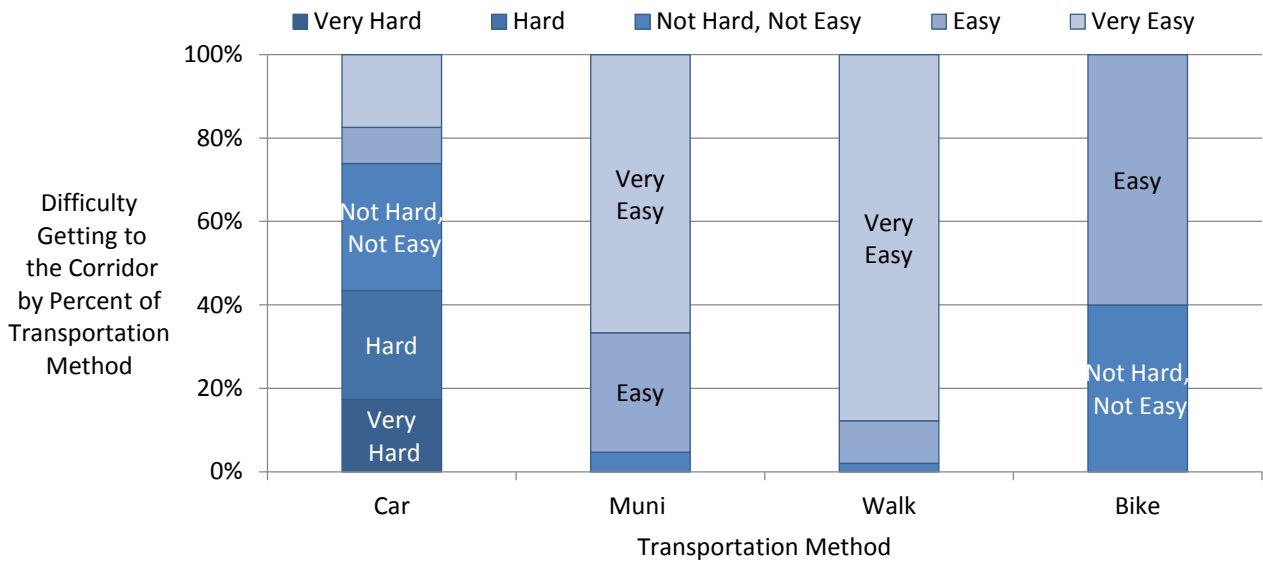
- Those who visit the corridor three times per week or more predominantly walked to the corridor, while those who visited the corridor once a week or less predominantly arrived by car.

Transportation Method by Percent of Visit Frequency - Inner Sunset



- Drivers had the most a difficult time getting to the corridor. Among those who took a car to the corridor, 43% said it was hard or very hard, and just 26% who said it was easy or very easy.
- Two thirds of those who took Muni said it was very easy to get to the corridor, and 95% said it was easy or very easy.

Difficulty of Getting to the Corridor by Percent of Transportation Method - Inner Sunset

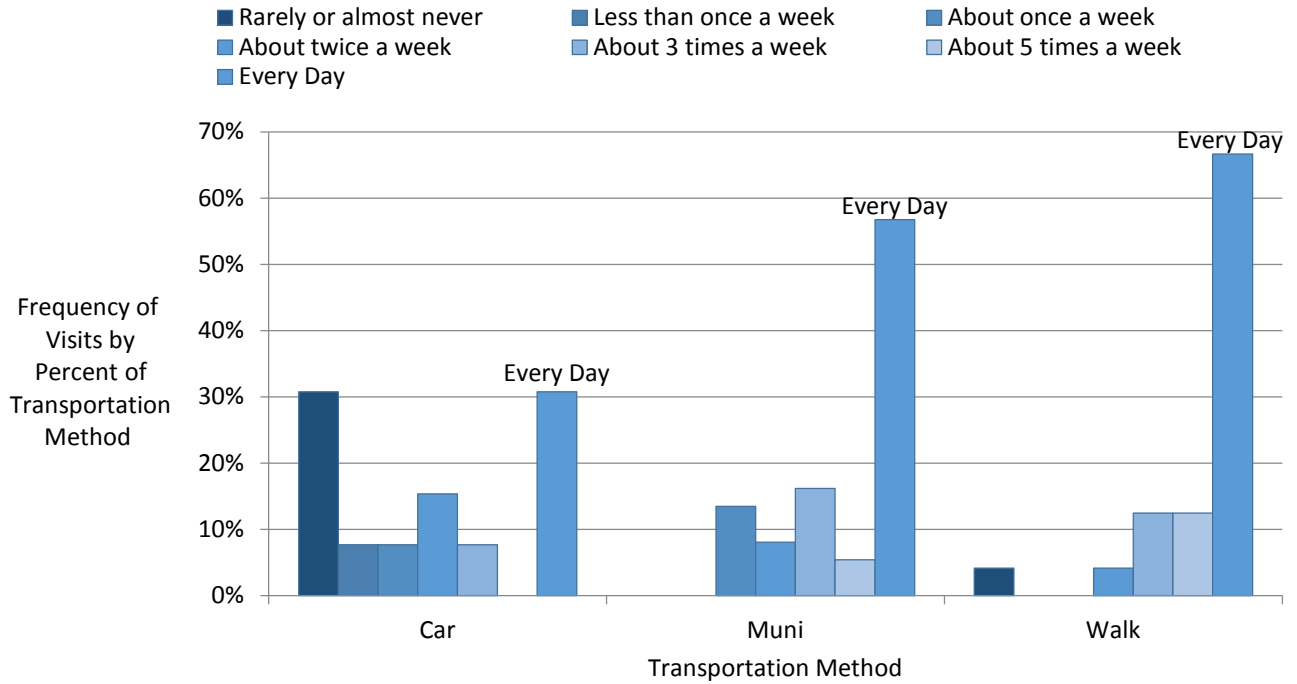


- Drivers parked an average of 2.8 blocks from their destination, with only 27% parking more than 3 blocks from their destination. Drivers said it took an average of 6 minutes to find parking.

San Bruno

- Responses for those who arrived in the corridor by BART, bike, and ride-sharing are excluded because of their small sample size.
- Over 50% of those who took Muni to San Bruno said they visit the corridor every day. Two thirds of those who walked to the corridor said that they visit it every day. Only 31% of those who arrived by car said they visit every day, and another 31% said they almost never come to the corridor.

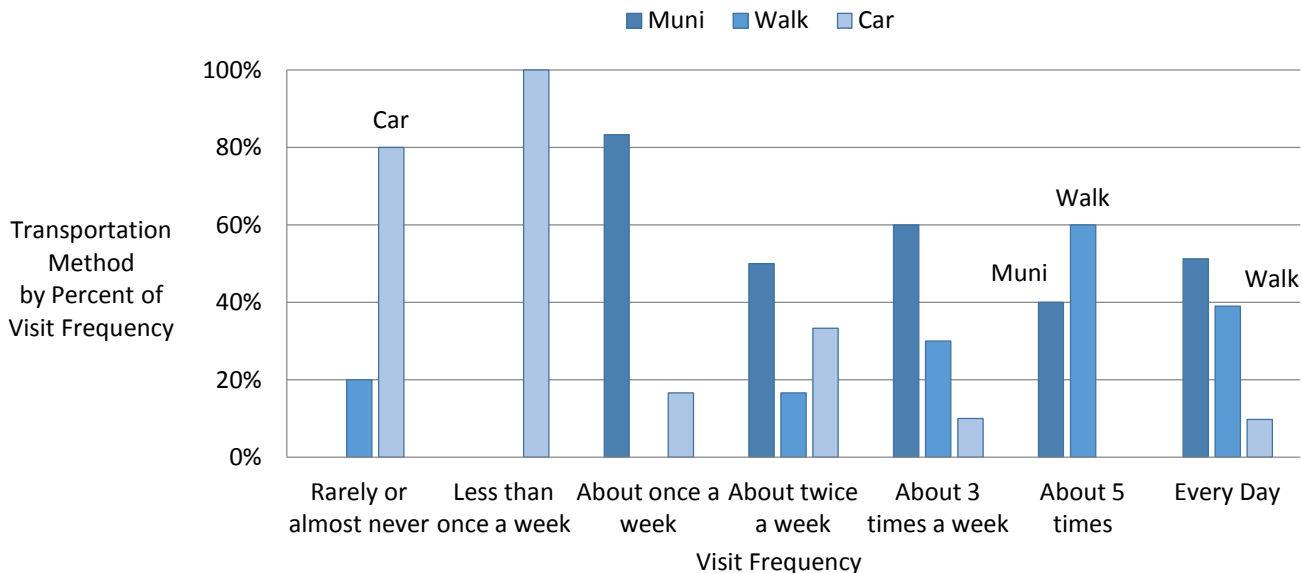
Frequency of Visits by Percent of Transportation Method - San Bruno



Attachment A: Analysis Summary

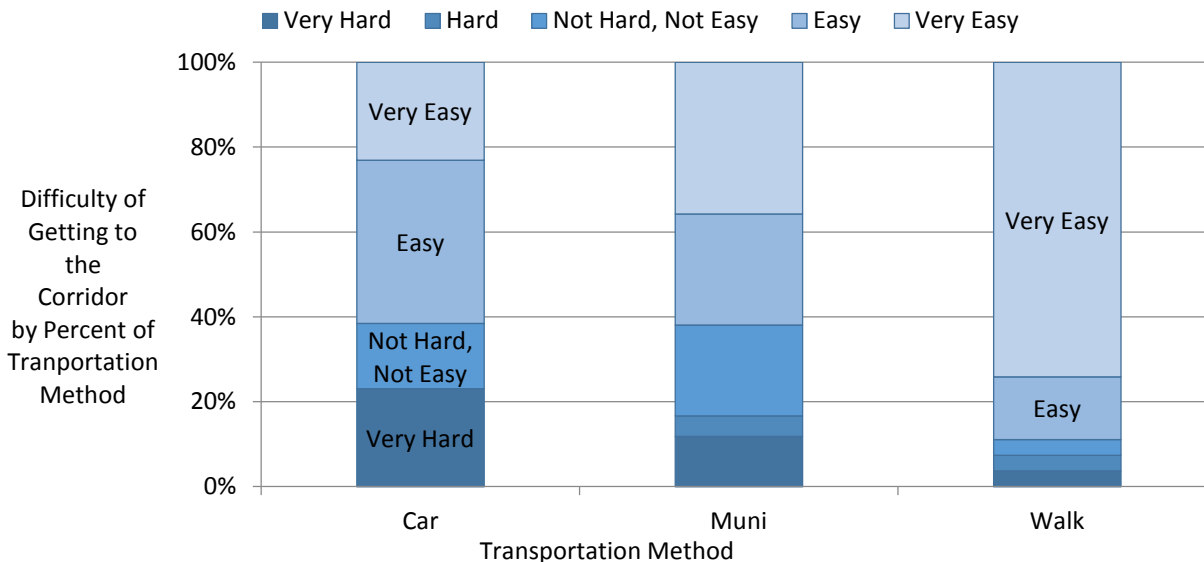
- Respondents who walked or took Muni were the greatest proportion of frequent visitors to the corridor. Drivers made up the majority of those who visited the corridor less than once per week.

Percent of Transportation Method by Visit Frequency- San Bruno



- It was most difficult to get to the corridor for those who took cars, followed by Muni riders and those who walked. Over 23% of those who used a car said it was very difficult to get to the corridor, while only 16% of those who took Muni said it was very hard or hard. Just over 60% of those who drove and those who took Muni said it was very easy or easy to get to the corridor. Those who walked had the easiest time getting to the corridor, with almost 90% reporting that it was very easy or easy to get there.

Difficulty of Getting to the Corridor by Percent of Transportation Method - San Bruno



- Respondents who drove to San Bruno said that it took them an average of 9 minutes to park. There was insufficient data to determine the average number of blocks away from their destination that they parked.

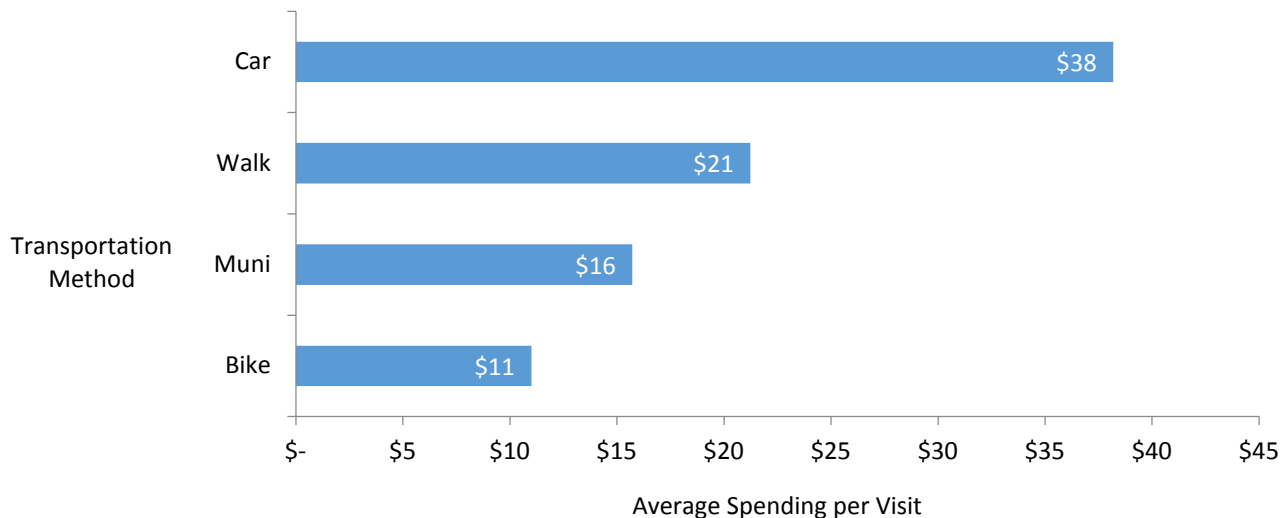
Spending

Respondents were asked about how much money they usually spend on the corridor per visit.

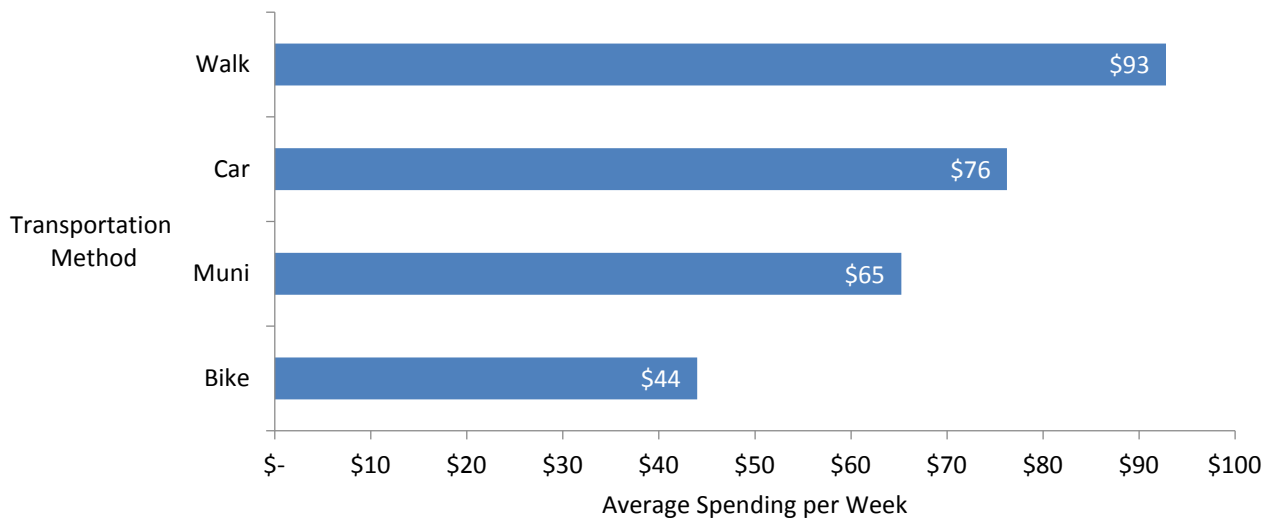
Inner Sunset

- Respondents who used a car to get to the corridor had the highest average spending per visit, but those who walked had the highest average spending per week.

Average Spending per Visit by Transportation Method - Inner Sunset ¹



Average Weekly Spending by Transportation Method - Inner Sunset ²



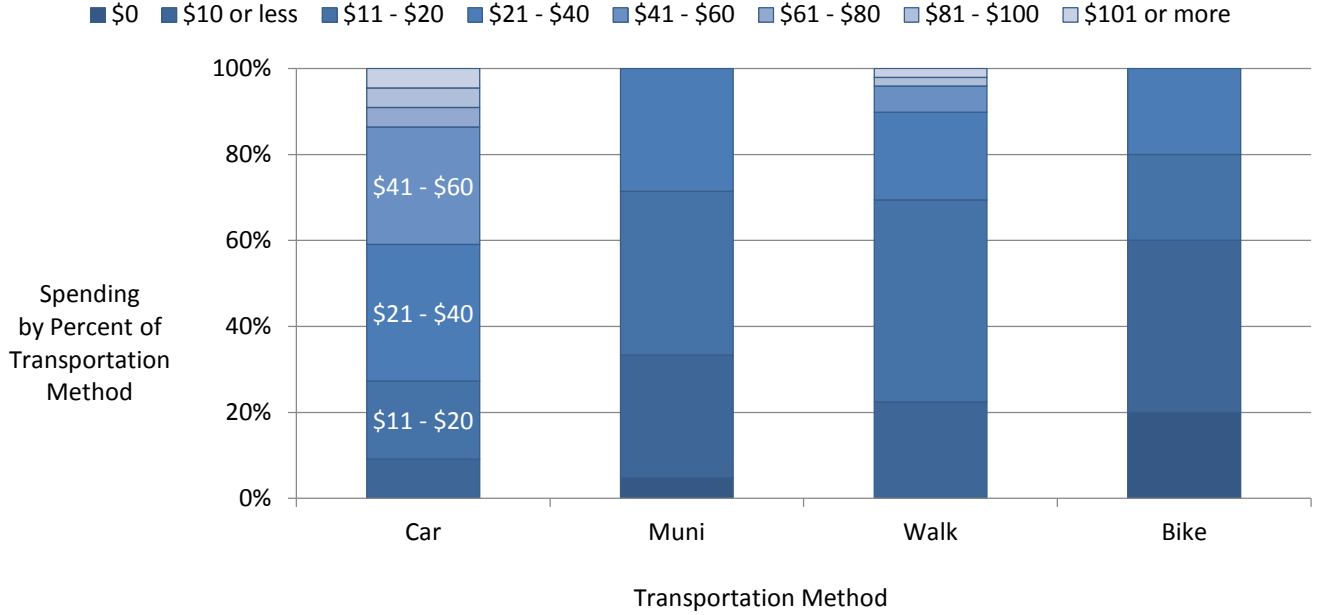
¹ Average spending uses the respondents' estimates of their usual spending per visit to the corridor. Survey answers were ranges of spending. The middle of each spending range was used to assign a specific spending amount to each respondent.

² Weekly spending for each individual was calculated by multiplying their usual spending amount by the number of times per week they said they visit the corridor. Averages were then calculated per transportation method.

Attachment A: Analysis Summary

- All of those who took Muni or biked said that they spend less than \$40 per visit. Just over 40% of those who drove said they spend more than \$40 per visit.

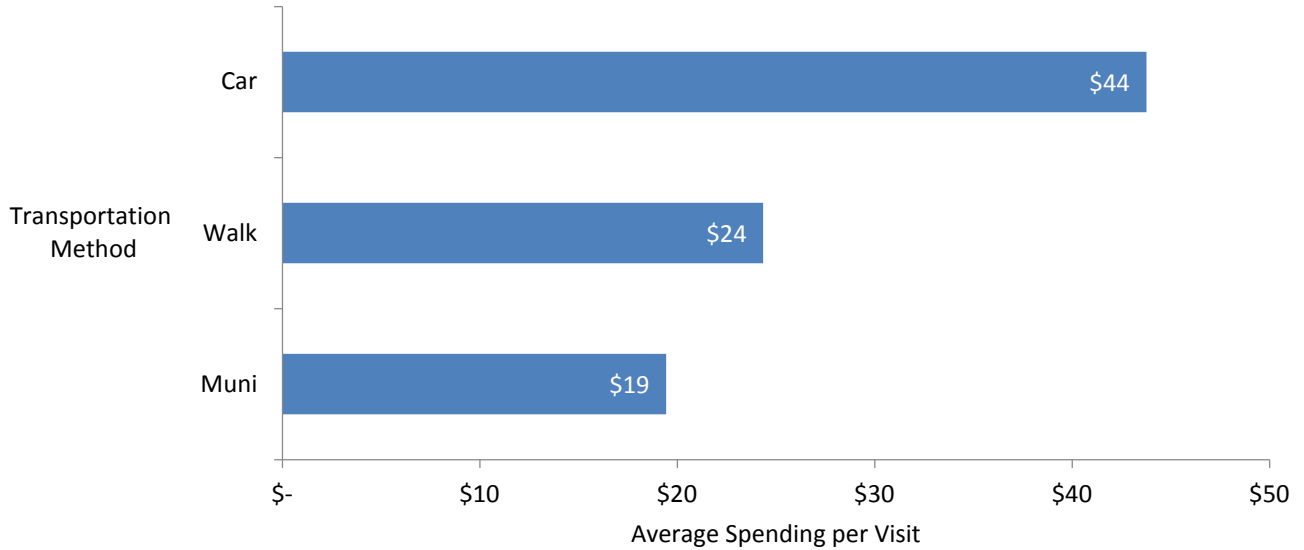
Spending by Percent of Transportation Method - Inner Sunset



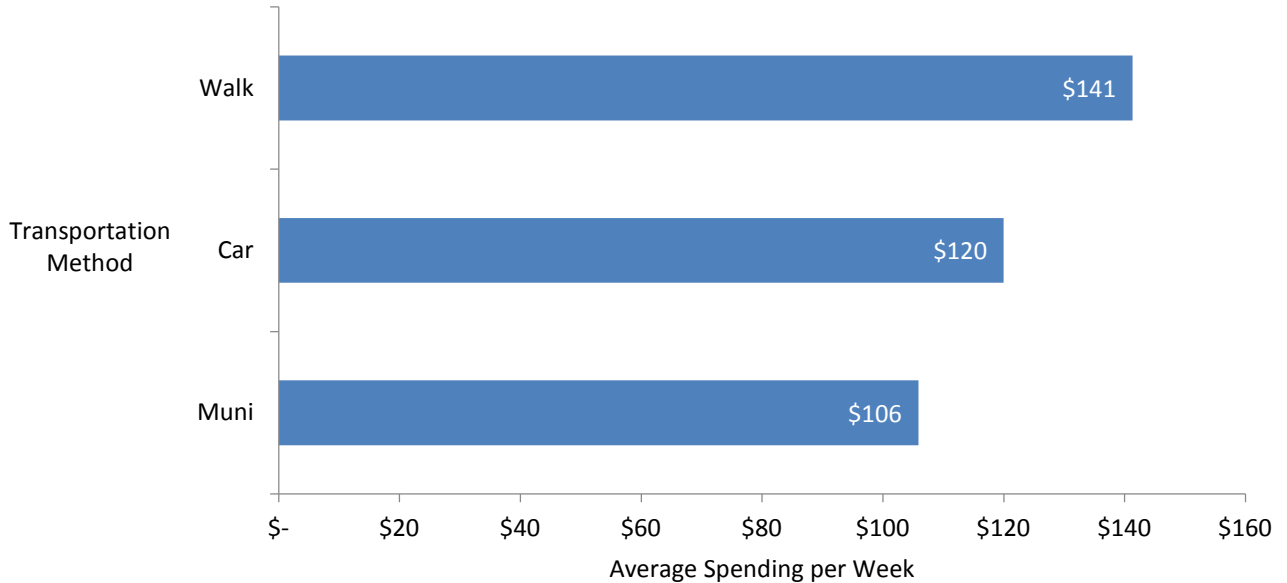
San Bruno

- Respondents who drove had the highest average spending per visit, but those who walked had the highest average weekly spending.

Average Spending per Visit by Transportation Method - San Bruno¹



Average Weekly Spending by Transportation Method - San Bruno²



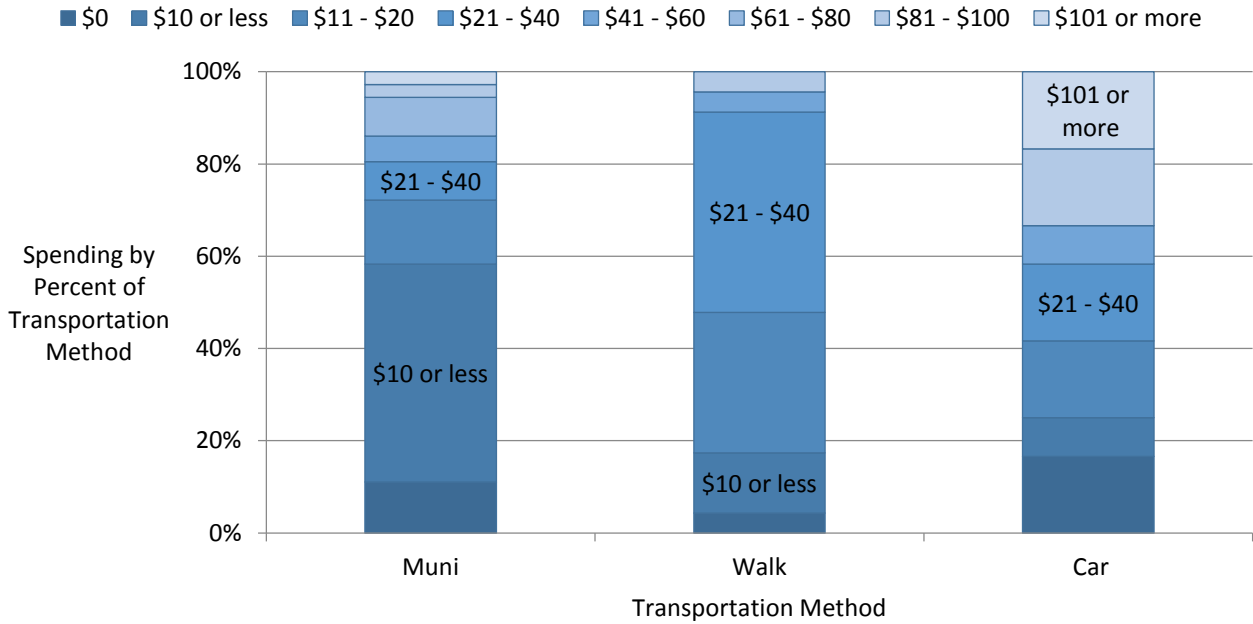
¹ Average spending uses the respondents' estimates of their usual spending per visit to the corridor. Survey answers were ranges of spending. The middle of each spending range was used to assign a specific spending amount to each respondent.

² Weekly spending for each individual was calculated by multiplying their usual spending amount by the number of times per week they said they visit the corridor. Averages were then calculated per transportation method.

Attachment A: Analysis Summary

- The greatest proportion of those who took Muni to San Bruno said they usually spend \$10 or less, while the majority of those who walked to the corridor said they usually spend \$20-\$40.

Spending by Percent of Transportation Method - San Bruno



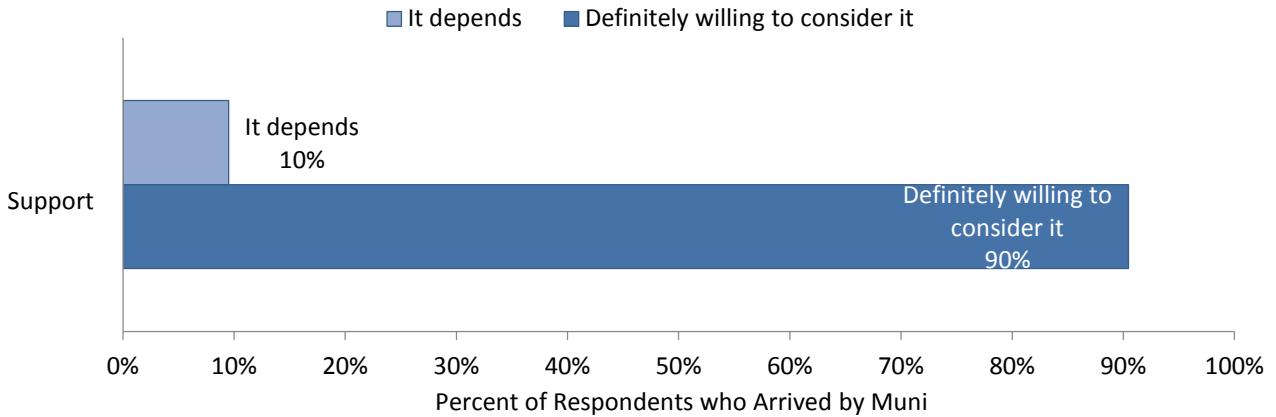
Transportation Improvements

If they took Muni, respondents were asked if they would consider walking an extra block or two to make their Muni ride faster and more reliable.

Inner Sunset

- In the Inner Sunset, over 90% of respondents who took Muni said that they were definitely willing to consider walking an additional block or two to reach a bus stop if it would mean that their ride would be faster and arrival times more reliable. Only 10% said, "it depends."

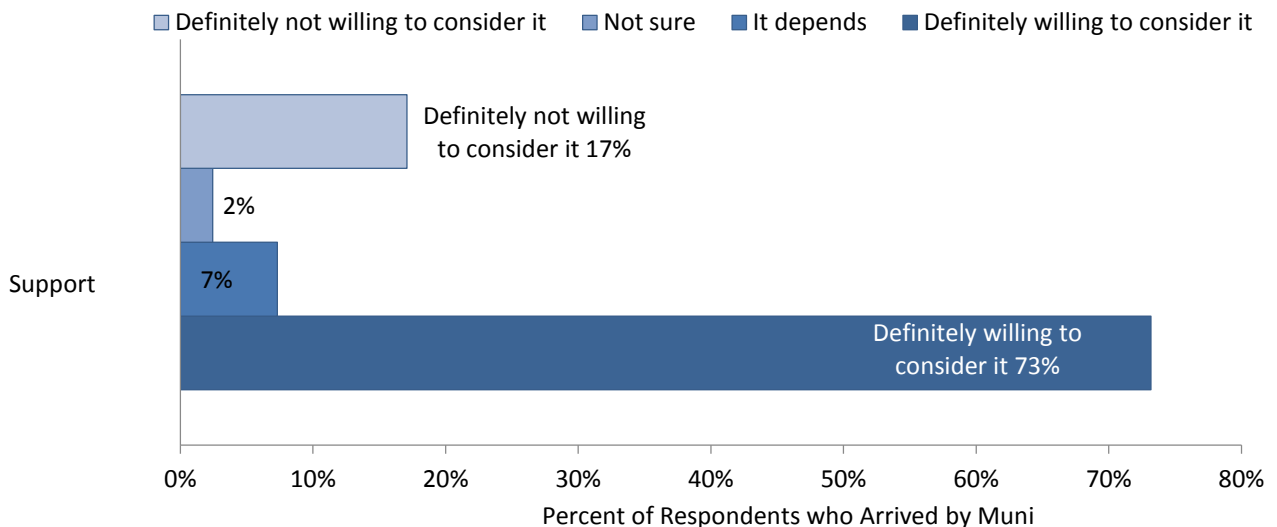
Support for Moving Stops to Improve Ride Times - Inner Sunset



San Bruno

- In San Bruno, 73% of respondents who took Muni said that they were definitely willing to consider walking an additional block or two to reach a bus stop if it would mean that their ride would be faster and arrival times more reliable. Another 17% of respondents said they were definitely not willing to consider it. A total of 9% said that it depends or that they were not sure.

Support for Moving Stops to Improve Ride Times - San Bruno

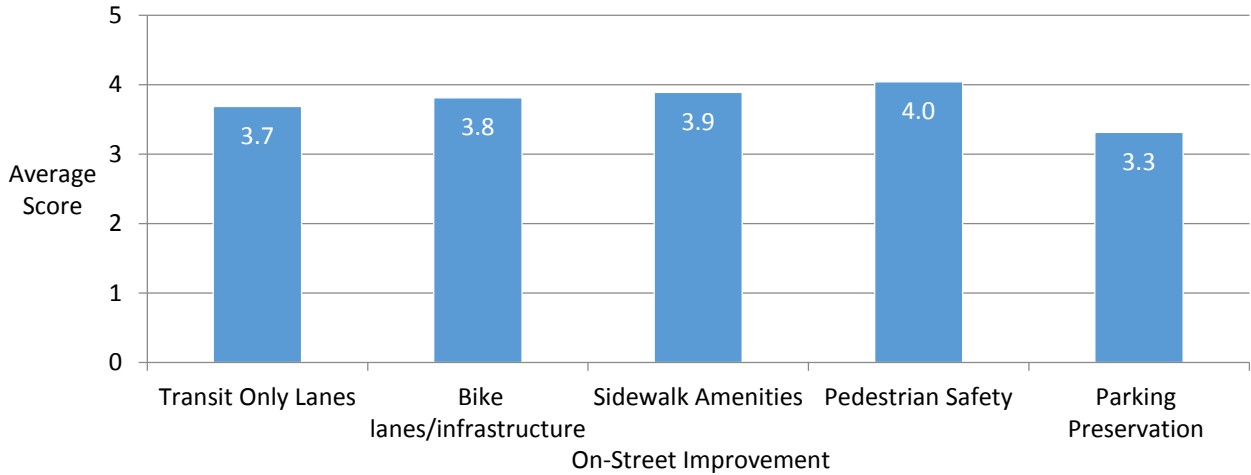


Residents were asked to score several options for on-street improvements on a scale of one (strongly against) to five (strongly support).

Inner Sunset

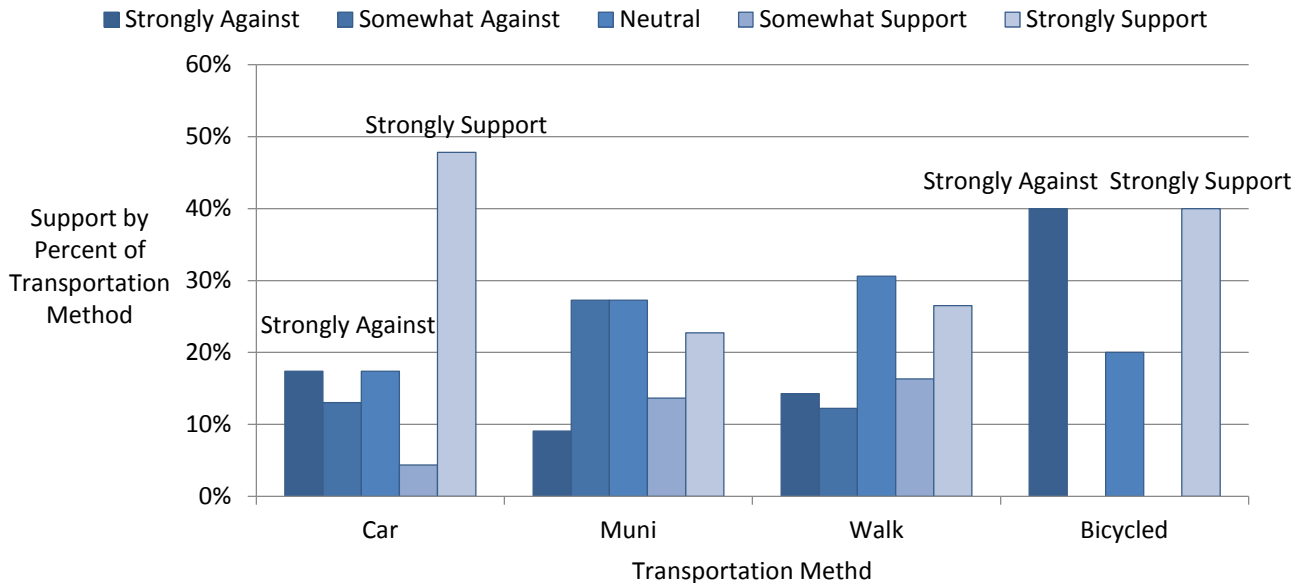
- All of the on-street improvement types received a favorable average score. Pedestrian safety and sidewalk amenities had the highest average score, at and just below 4 out of 5. Parking preservation had the lowest score with 3.3 out of 5.

Average Score for On-Street Improvements - Inner Sunset
1=Strongly Against, 5=Strongly Support



- In the Inner Sunset, there was the most support for parking preservation among those who drove. Between 20% and 30% of those who took Muni or walked supported parking preservation.

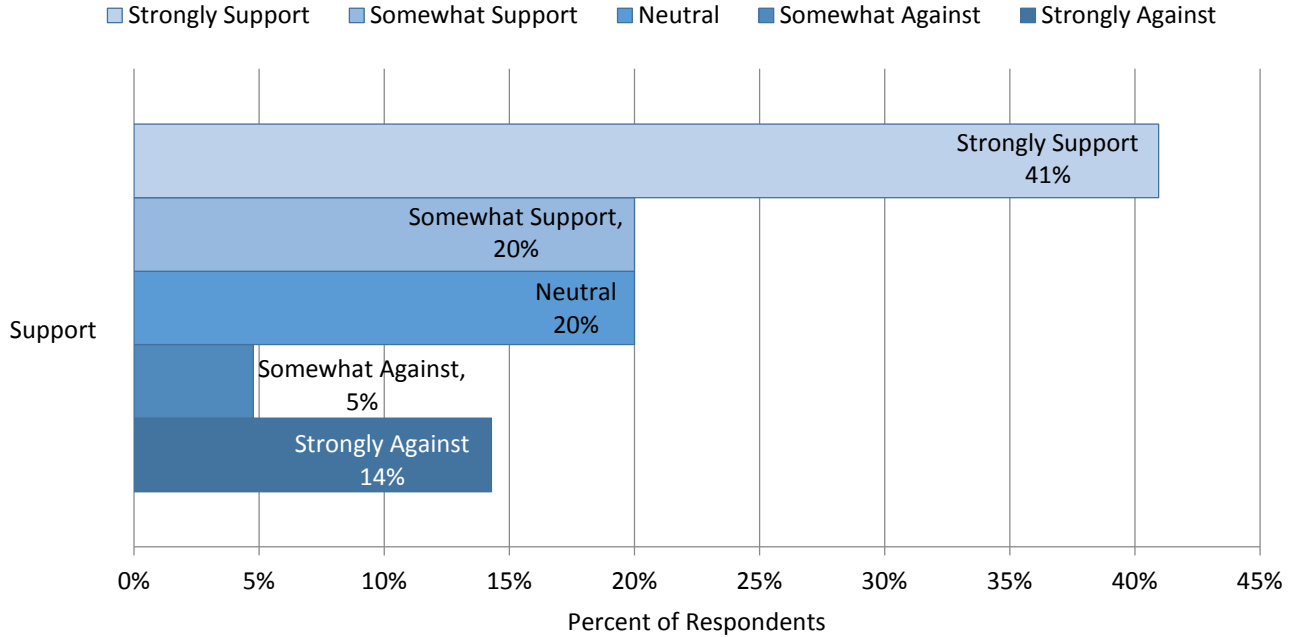
Support of Parking Preservation by Percent of Transportation Method - Inner Sunset



Attachment A: Analysis Summary

- In the Inner Sunset, over 60% of respondents supported transit-only lanes or other transit amenities and 19% were opposed.

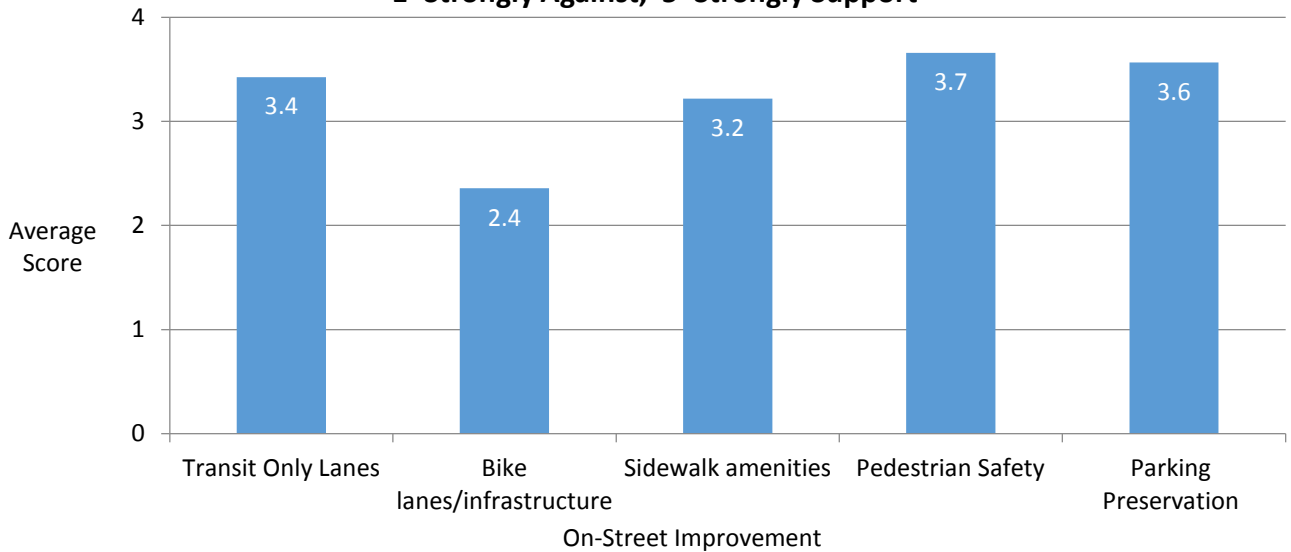
Support for Transit-Only Lanes or Other Transit Amenities - Inner Sunset



San Bruno

- All of the on-street improvement types received an average score that reflected positive support, except for bike lanes. In San Bruno, pedestrian safety scored the highest with a 3.7 followed closely by parking preservation at 3.6. Bike lanes and infrastructure scored significantly less favorably, with an average score of 2.4 out of 5.

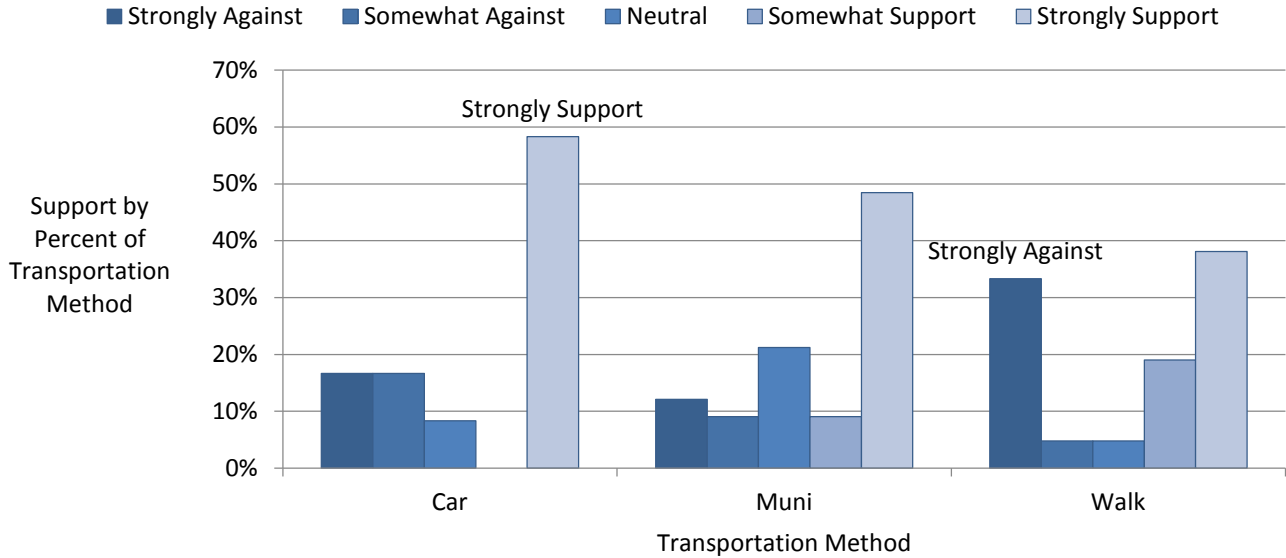
Average Score for On-Street Improvements - San Bruno
1=Strongly Against, 5=Strongly Support



Attachment A: Analysis Summary

- In San Bruno, over 50% of those who drove, took Muni or walked supported parking preservation. Almost 60% of those who drove strongly supported parking preservation, as did 48% of those who took Muni and 38% of those who walked. However, almost the same percent of those who walked, 33%, strongly oppose parking preservation.

Support of Parking Preservation by Percent of Transportation Method - San Bruno



- In the San Bruno, over 60% of respondents strongly supported transit-only lanes or other transit amenities. However, just under one third of respondents were opposed.

Support for Transit-Only Lanes or Other Transit Amenities - San Bruno

