



SFMTA
Municipal
Transportation
Agency

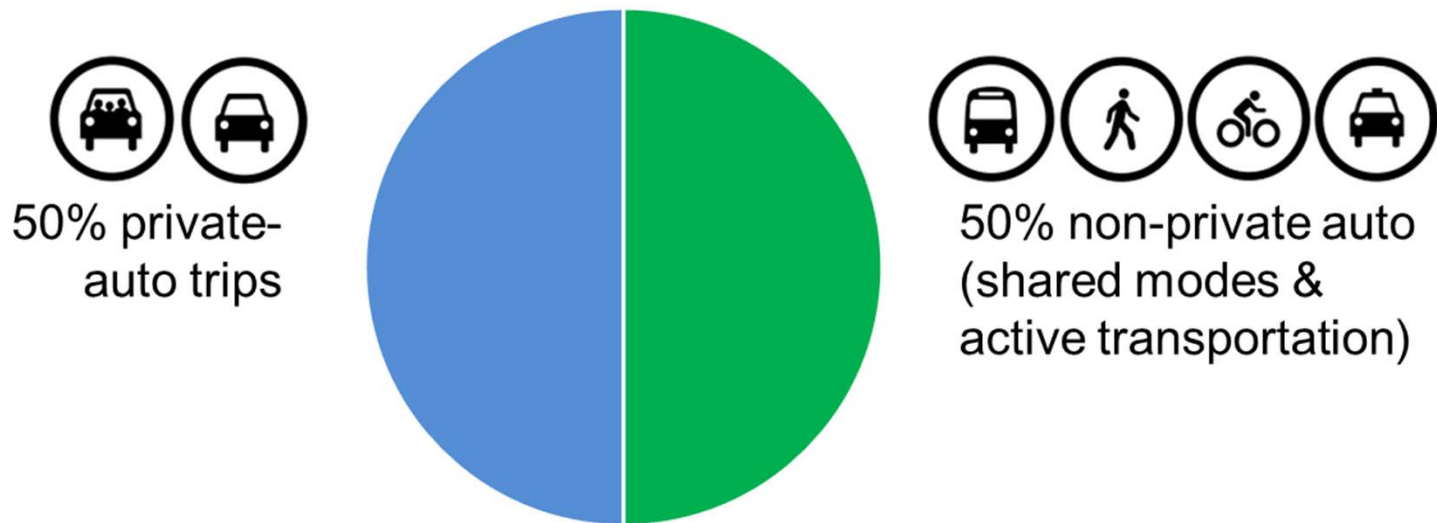
Travel Decision Survey 2015

Key Findings

February 9, 2016

Strategic Plan Objective 2.3: 50/50 Mode Share

Maintain split of 50% private auto trips and 50% non-private auto trips for all SF travel



FY 2018 Target

Fall 2015 Survey

➤ Purpose

- Meeting Strategic Objective for mode share?
- Assess travel to, from, within SF

➤ Methodology

- Telephone study (land line and mobile)
- 762 Bay Area residents surveyed
- Margin of error for total sample: +/- 3.5%

➤ Demographics

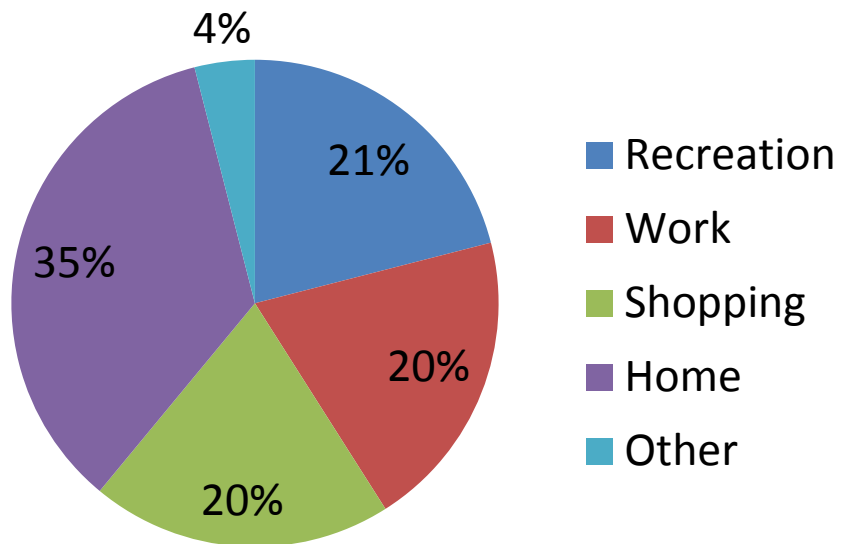
- Additional info broken down by Age, Gender, Income

➤ History

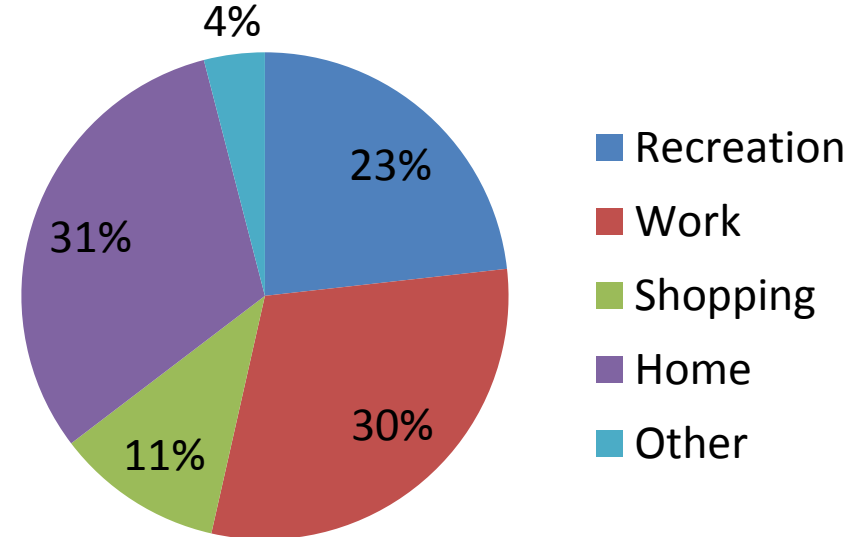
- Annual Surveys since 2012

Trip Purpose

Purpose of trips over previous two days – SF Residents

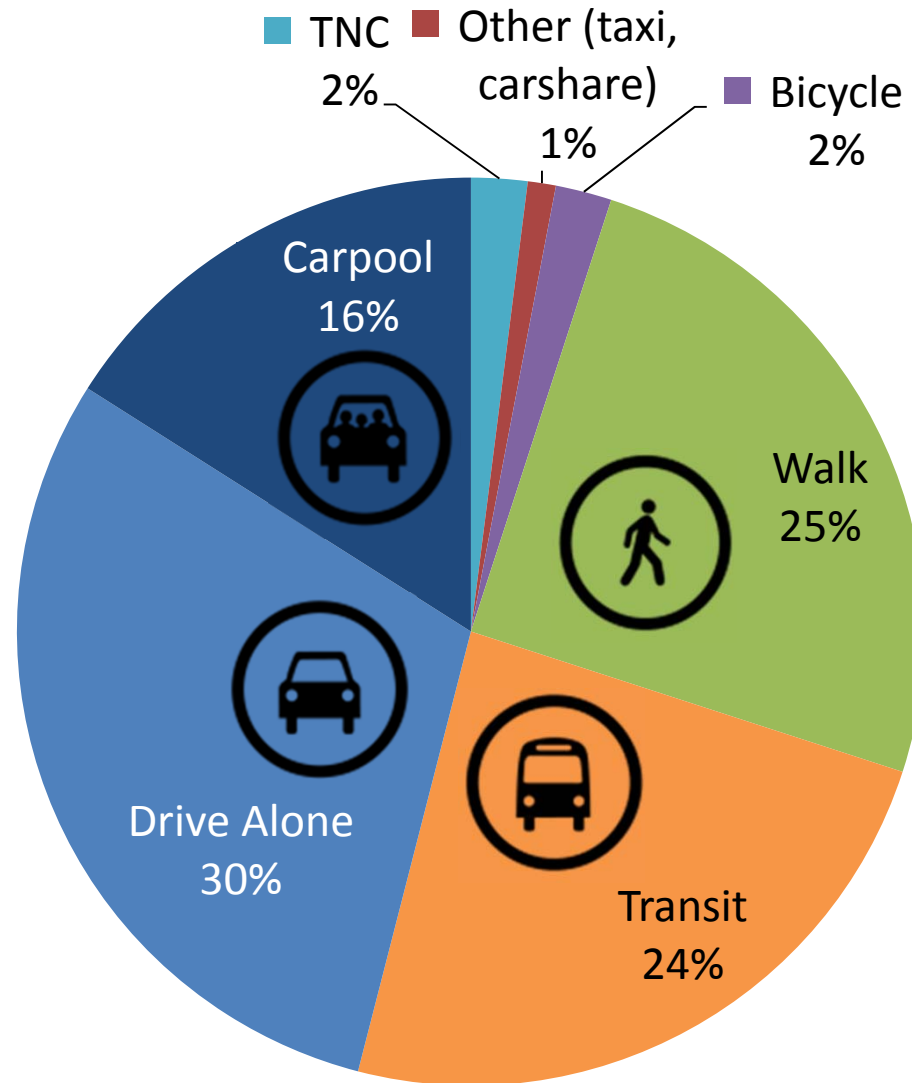


Purpose of trips over previous 30 days – Other Bay Area Residents



➤ Considered all trips taken in SF – not only work commutes

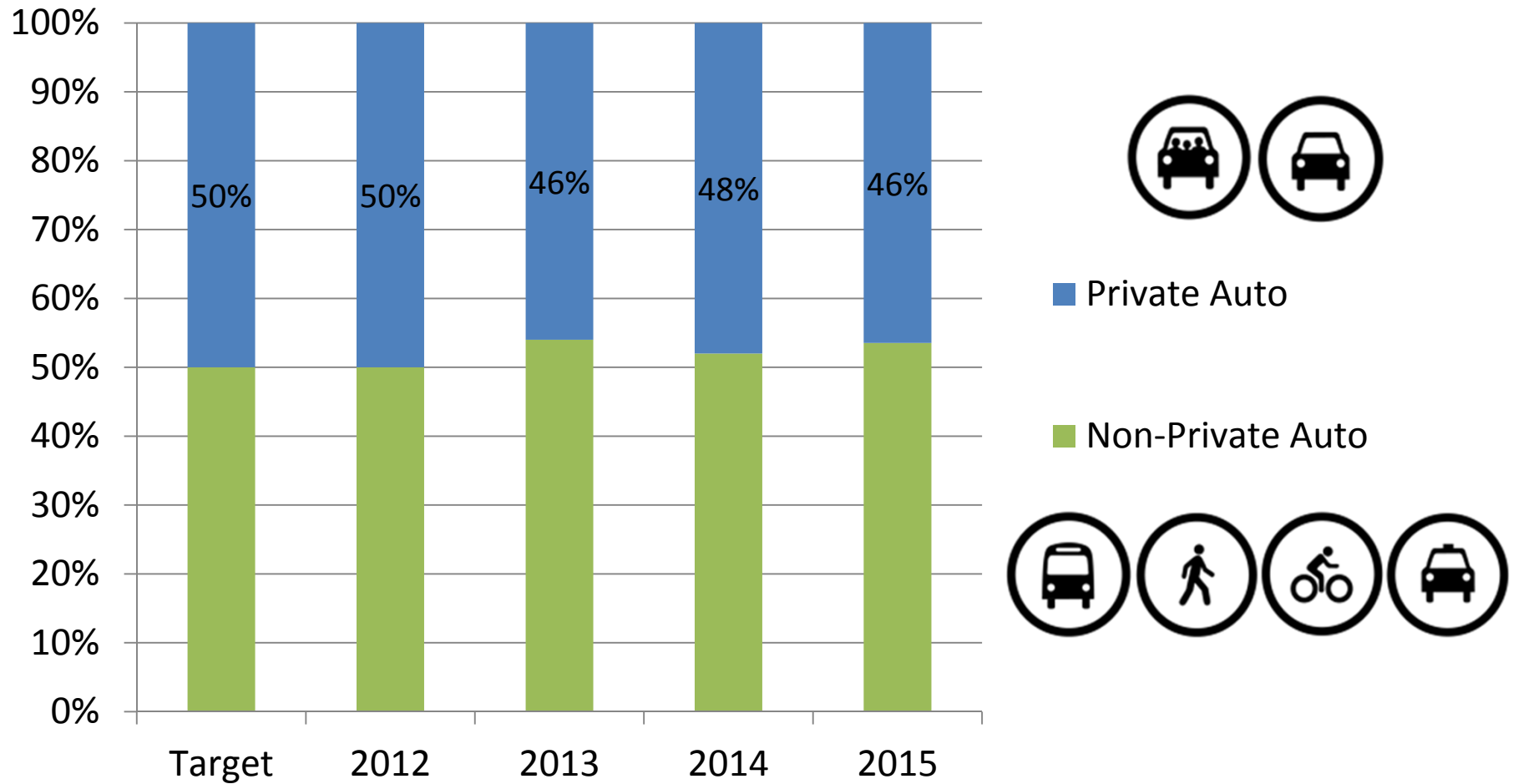
2015 Mode Share



Estimated Mode Share in San Francisco for 2015

Context: Previous Years

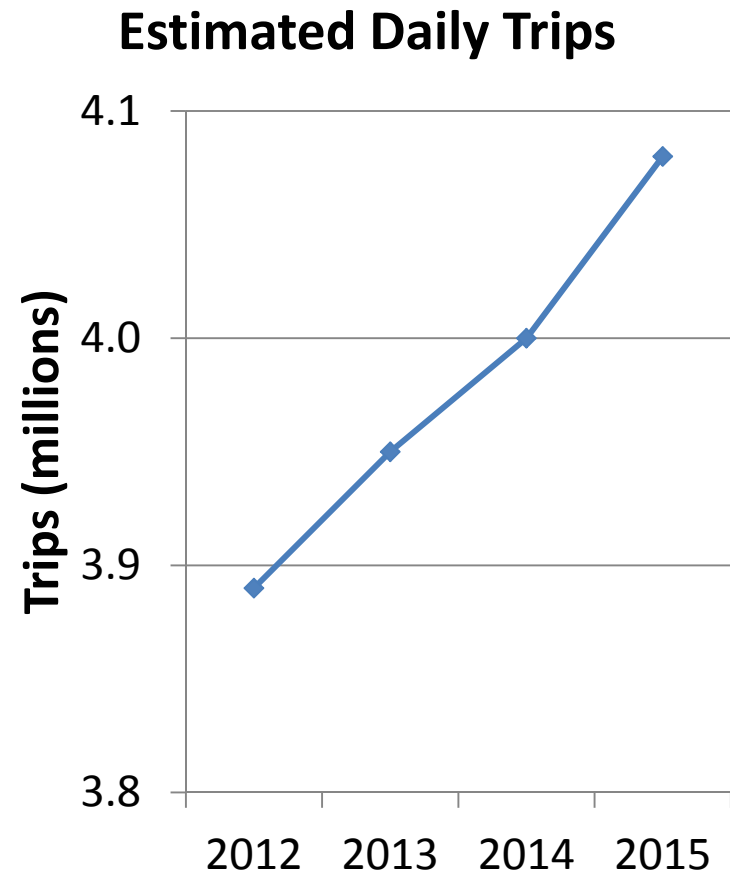
Estimated Mode Share by Years, compared to Goal



*Note: Variation from 50% goal is within the 3.5% margin for error

Key Finding

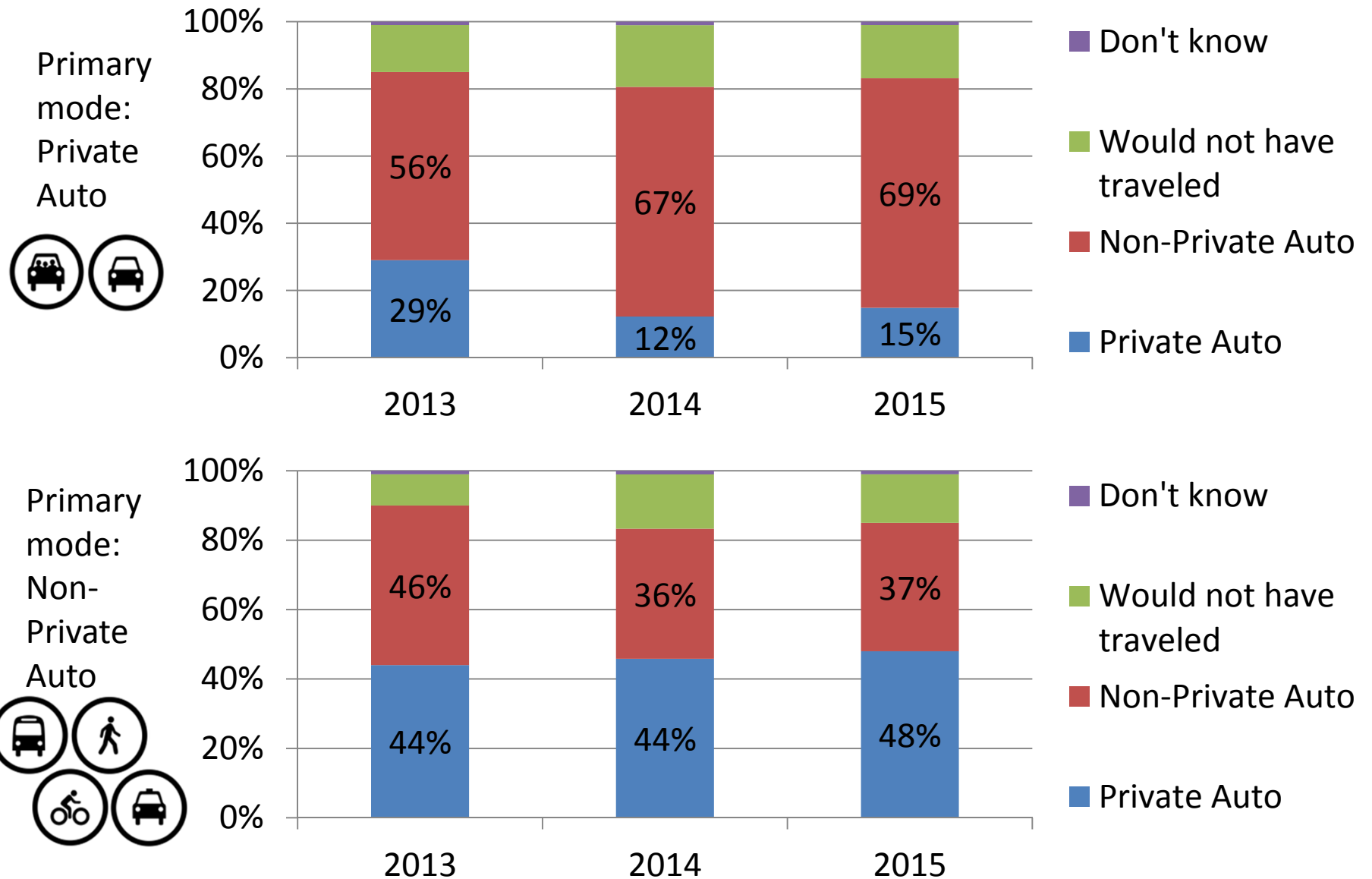
- The Strategic Plan Objective of no more than 50% of all trips made in private autos continues to be met, even as the overall volume of daily trips is estimated to have increased.
- Over 4 million estimated daily trips within, to and from San Francisco



Source: SF-CHAMP Year 2012-CHAMP 5.0 run for TIMMA TIPS

Preferred Alternatives

If your primary mode was unavailable, how would you travel instead?



Motivators for Driving

2015 Results: Which of the following influenced your decision to drive?

“Strongly influenced my decision to drive”	All respondents (445 responses)	SF Residents Only (185 responses)	Other Bay Area Residents (260 responses)
Driving and parking is faster than other modes	78%	79%	77%
Parking is available close to my destination	69%	70%	69%
Parking at my destination was free/cheap	51%	64%	43%
I needed to carry something	44%	51%	40%
Driving and parking is safer than other modes	41%	39%	43%
I needed to make multiple stops before going home	38%	41%	37%
I was traveling with children	22%	24%	20%



The primary reasons chosen for driving were that it is **faster** and that **parking is available** nearby.



Car Ownership

- Rate of access to or ownership of a car is on the decline, particularly among San Franciscans (down to 70% from 74% in 2014)
- Car ownership and access is significantly higher for non-San Francisco residents in other Bay Area counties

	Do you own a car or have regular access to a car through family or friends?	All respondents (690 responses)	SF Residents (317 responses)	Other Bay Area Residents (373 responses)
2	Yes	85%	74%	95%
0	No	15%	26%	5%
1				
4				

	Do you own a car or have regular access to a car through family or friends?	All respondents (762 responses)	SF Residents (382 responses)	Other Bay Area Residents (380 responses)
2	Yes	81%	70%	92%
0	No	18%	30%	6%
1				
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Reasons for Reducing Cars

2015 Results: What was the primary reason you reduced cars in your home?

Reason for reducing household cars	All respondents (128 responses)	SF Residents Only (69 responses)	Other Bay Area Residents (59 responses)
I did not use the car enough	25%	26%	24%
Car ownership too expensive	20%	24%	16%
The car was broken/damaged	16%	12%	21%
The car was old	10%	8%	13%
Car owner left household	10%	6%	13%
Lack of parking	9%	13%	5%
Use public transit	7%	10%	3%
Parking costs too expensive	4%	5%	2%



The most common reasons for shedding a car were that they did not use the car enough and that car ownership was too expensive

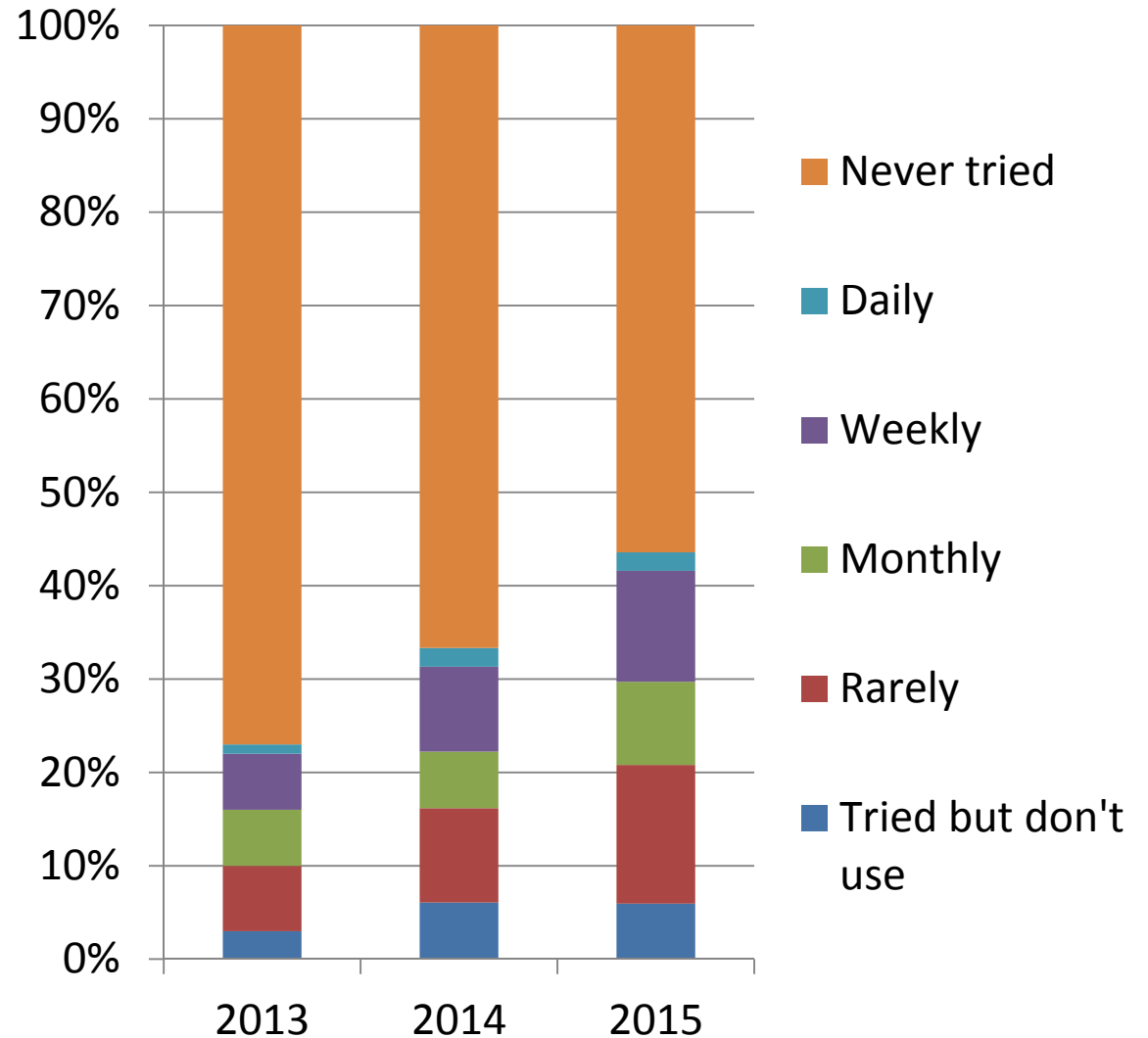


TNC Usage



- Usage of Transportation Network Companies (TNCs) is increasing among all Bay Area residents.
- Still, more than half the respondents have never tried TNCs.

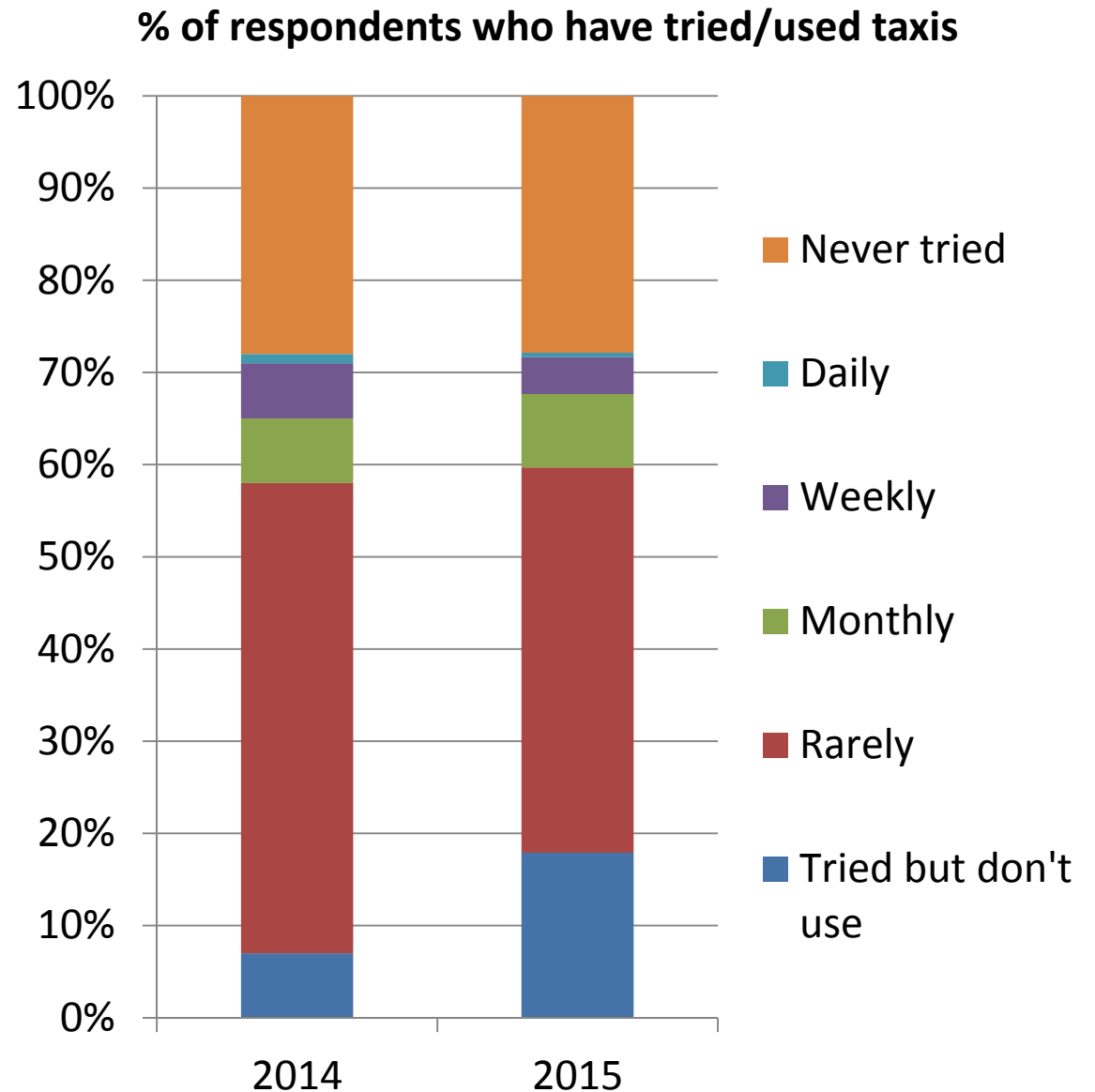
% of respondents who have tried TNCs



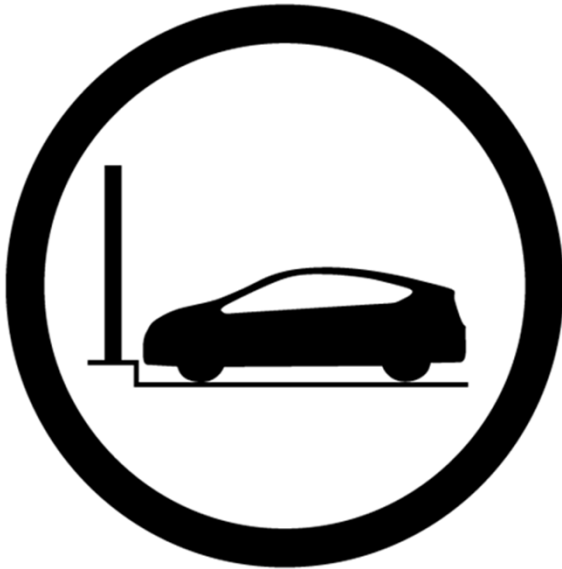
Taxi Usage



- Regular taxi usage appears to be declining among all Bay Area residents.
- In 2015, 75% of San Franciscans and 70% of other Bay Area residents used or tried a taxi



CarShare Usage



- CarShare usage is more common among SF Residents than other Bay Area residents.
- Overall, about 12% of all surveyed tried it, and approximately 3% use it at least monthly.
- There is little variation in overall usage from previous years

2015 Questionnaire Results

How often do you use carshare?	All respondents	SF Residents Only	Other Bay Area Residents
Never tried	88%	84%	93%
Daily	<0.5%	<0.5%	1%
Weekly	1%	1%	-
Monthly	2%	4%	1%
Rarely	4%	7%	2%
I've tried it, but I do not use it	4%	3%	5%

Bike Share Usage



- Bike Share usage has not significantly changed in the past three years.
- Approximately 3% of respondents have tried Bay Area Bike Share

2015 Questionnaire Results

How often do you use Bay Area BikeShare?	All respondents	SF Residents Only	Other Bay Area Residents
Never tried	97%	97%	97%
Daily	1%	<0.5%	1%
Weekly	<0.5%	-	<0.5%
Monthly	-	-	-
Rarely	2%	2%	1%
I've tried it, but I do not use it	1%	2%	1%

Timeline

2016 Survey Process

