



SFMTA
Municipal
Transportation
Agency

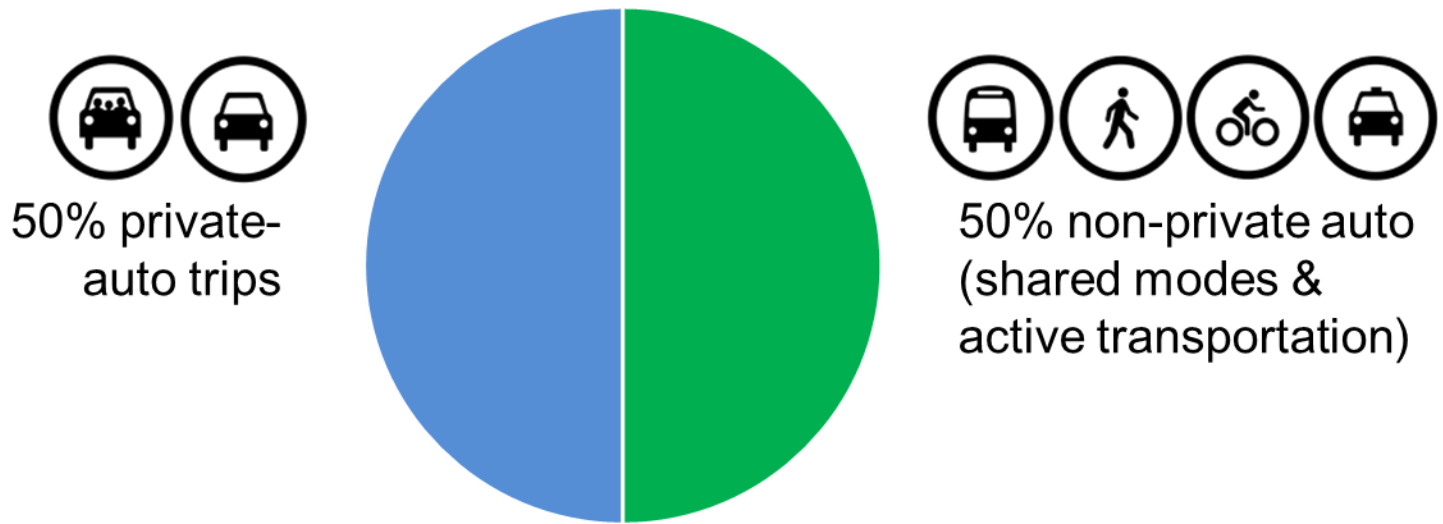
Travel Decision Survey 2015

Key Findings

April 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



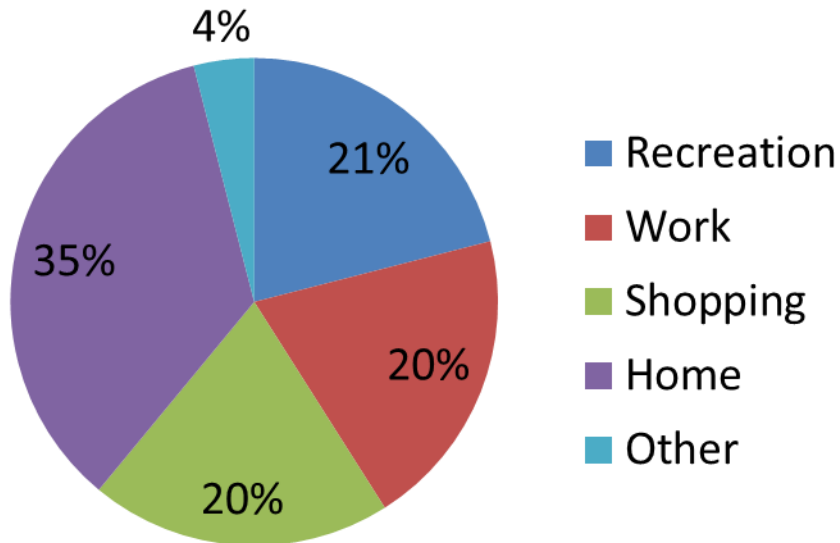
FY 2018 Target

Fall 2015 Survey

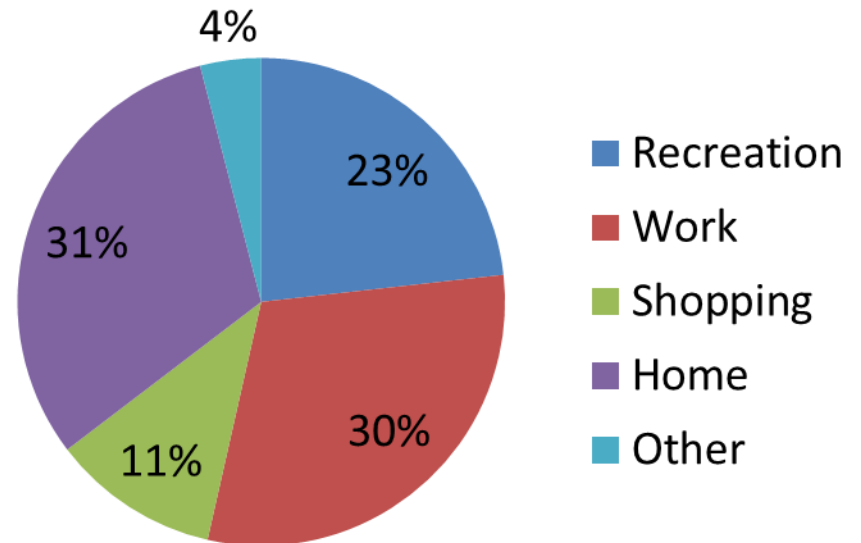
- Purpose
 - Meeting Strategic Objective for mode share?
 - Assess travel to, from, within SF
 - KEY DISTINCTION: All trips, not just work commute
- Methodology
 - Telephone study (land line and mobile)
 - 762 Bay Area residents surveyed
 - Margin of error for total sample: +/- 3.5%
- Demographics
 - Additional info broken down by Age, Gender, Income
- History
 - Annual Surveys since 2012

Trip Purpose

Purpose of trips over previous two days – SF Residents

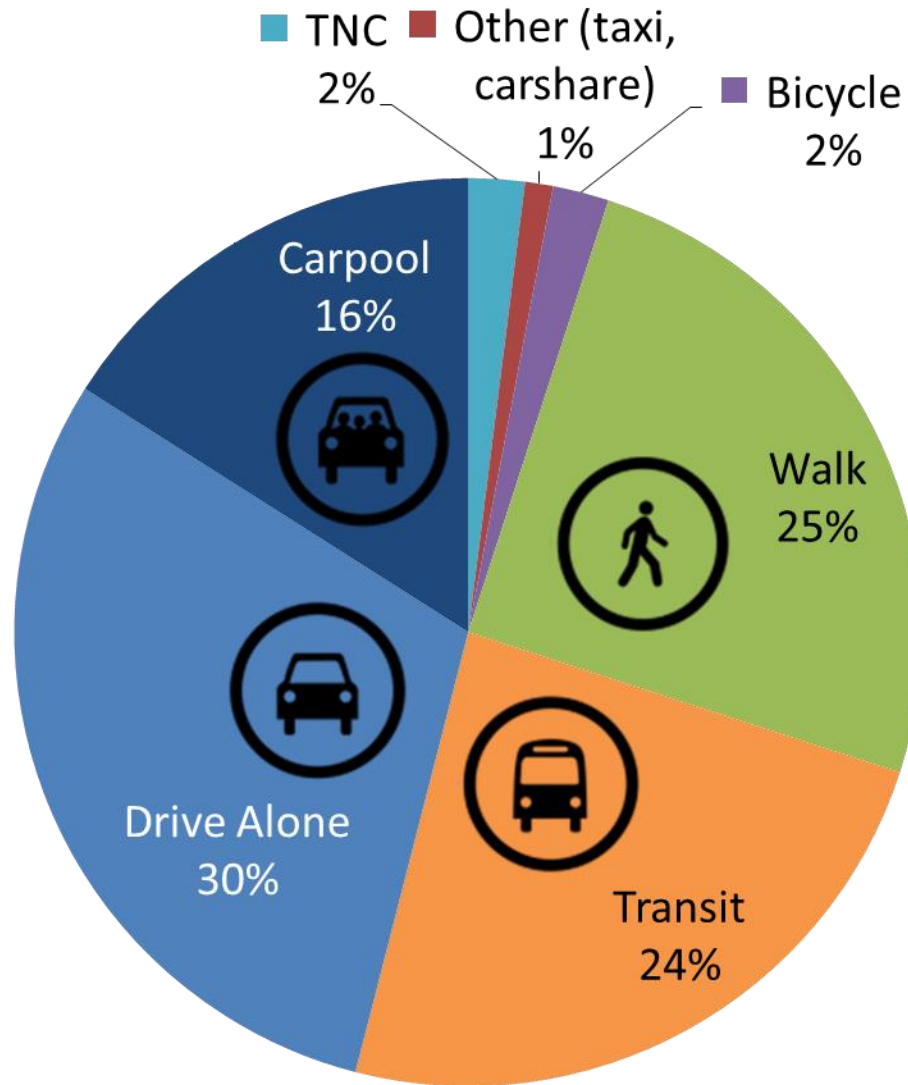


Purpose of trips over previous 30 days – Other Bay Area Residents



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

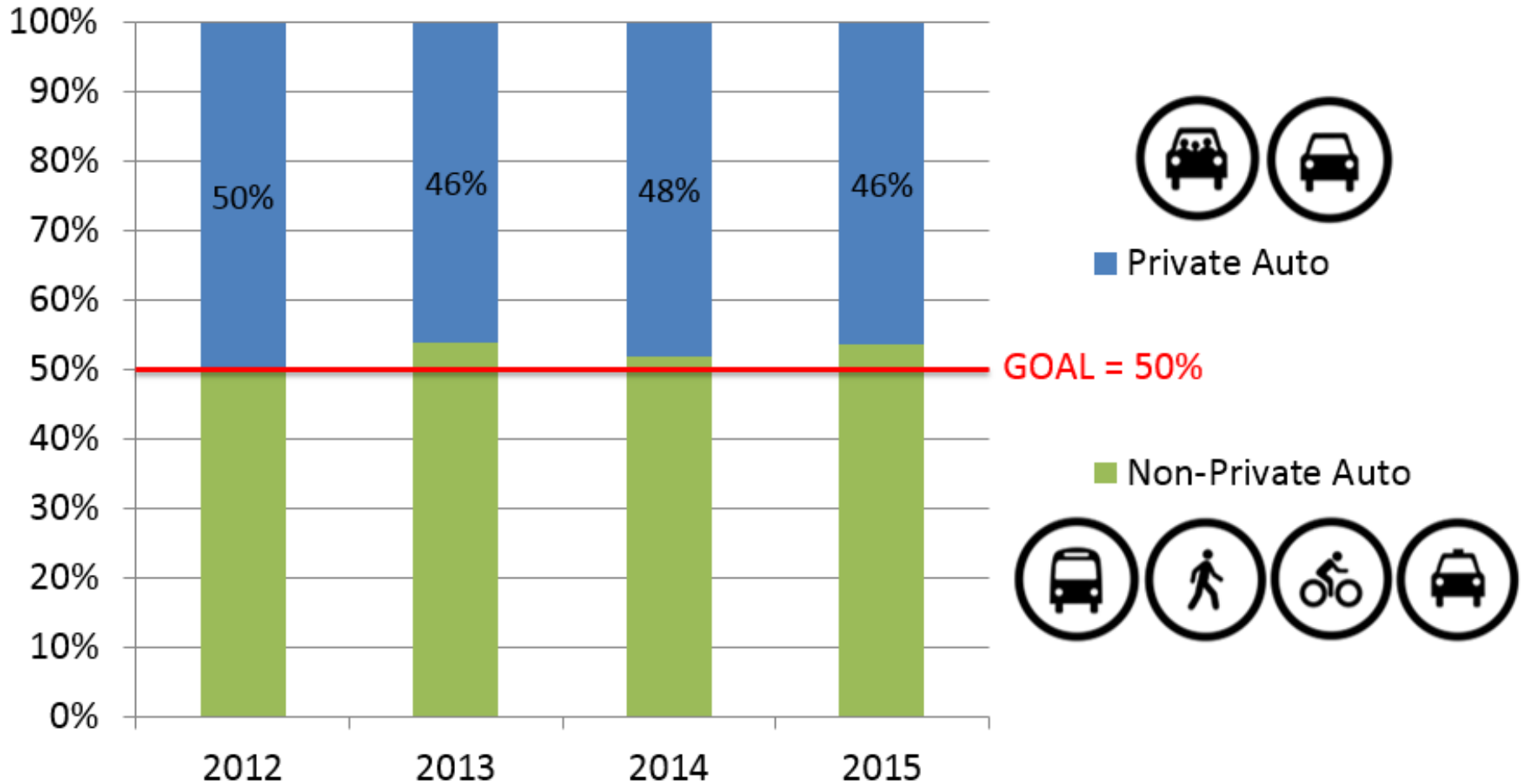
2015 Mode Share



Estimated Mode Share in San Francisco for 2015

Context: Previous Years

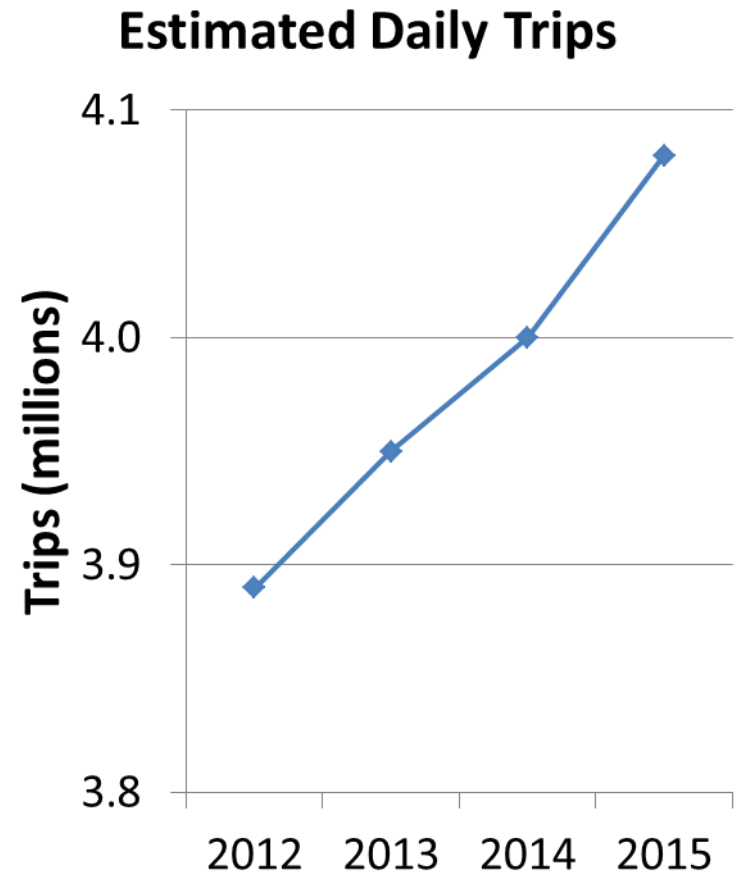
Estimated Mode Share by Years, compared to Goal



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

Key Finding

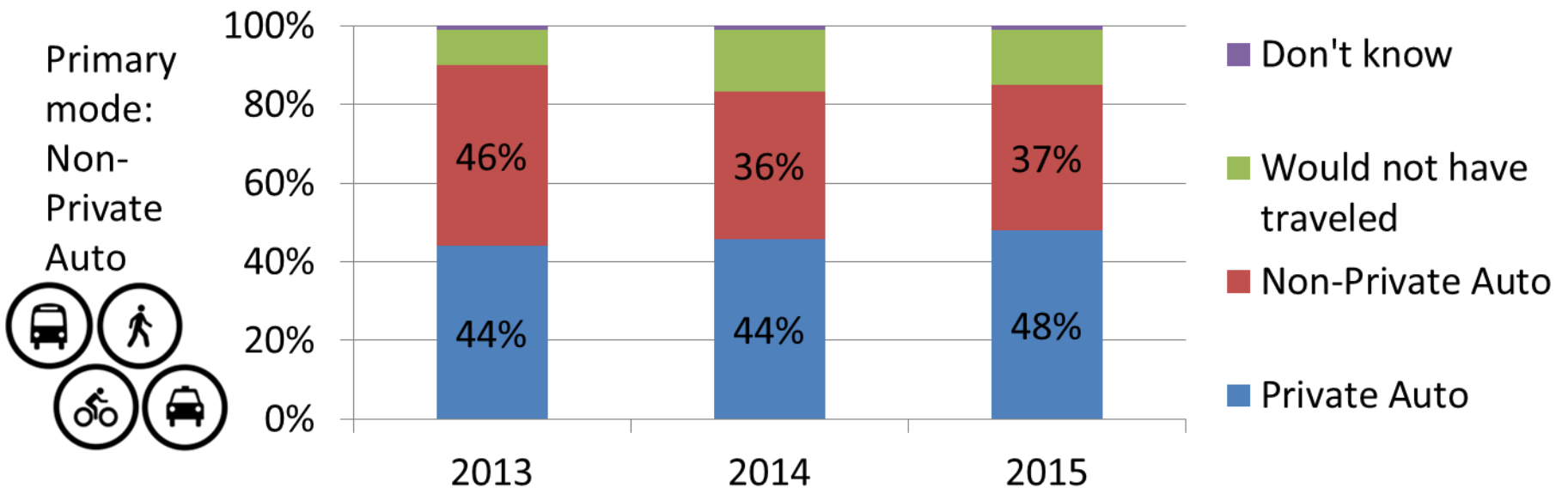
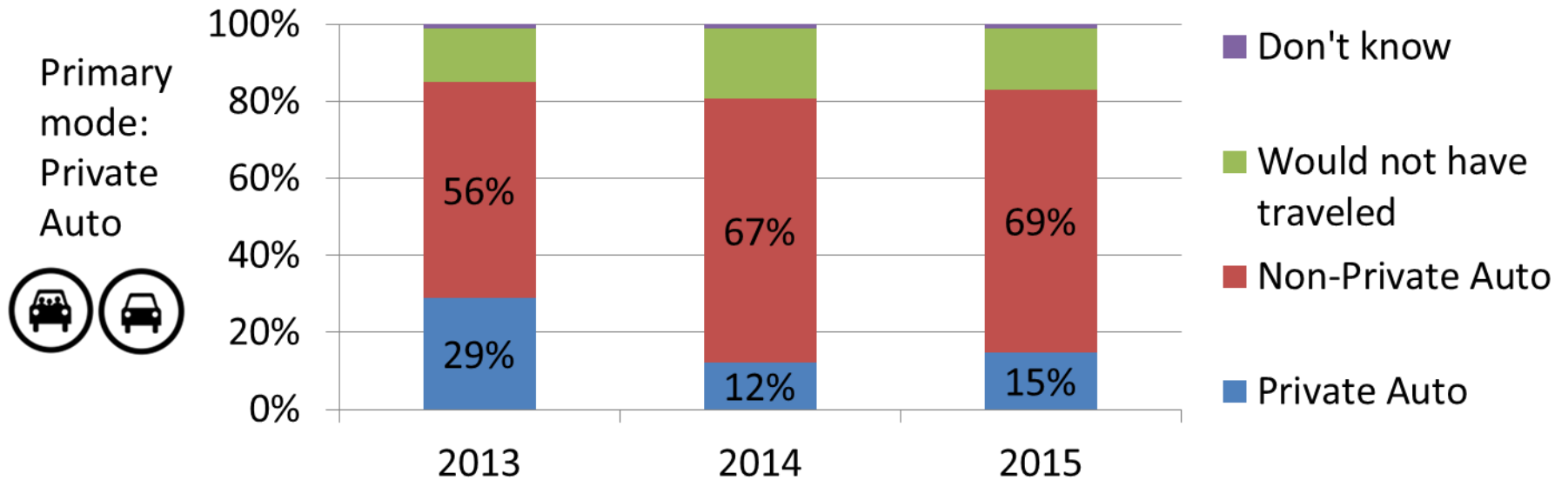
- The Strategic Plan Objective of no more than 50% of all trips made in private autos continues to be met, even as the overall volume of daily trips is estimated to have increased.
- Over 4 million estimated daily trips within, to and from San Francisco



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 | | | | |
| 5 | | | | |

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 the car ownership was too expensive

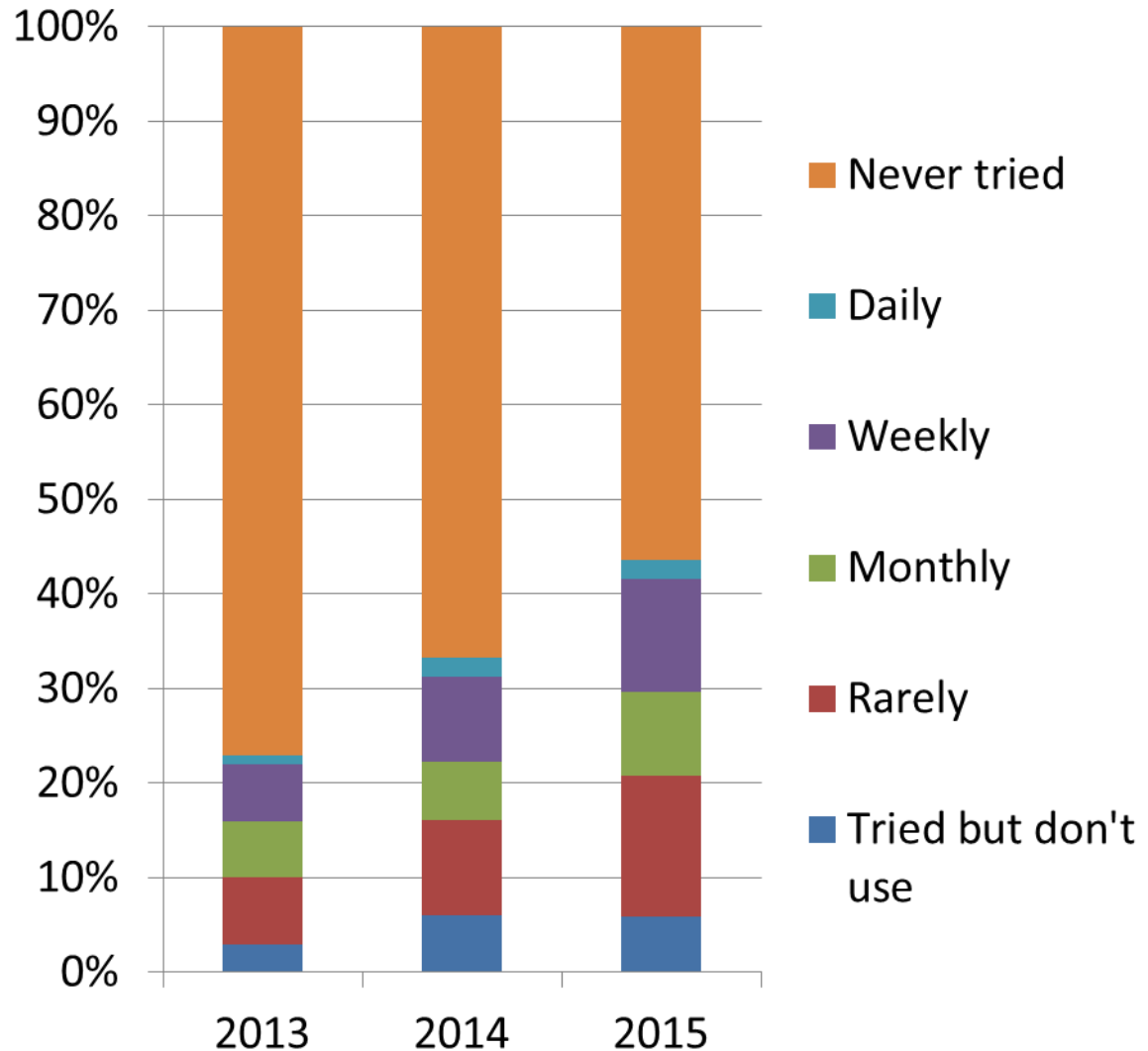


TNC Usage



- 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

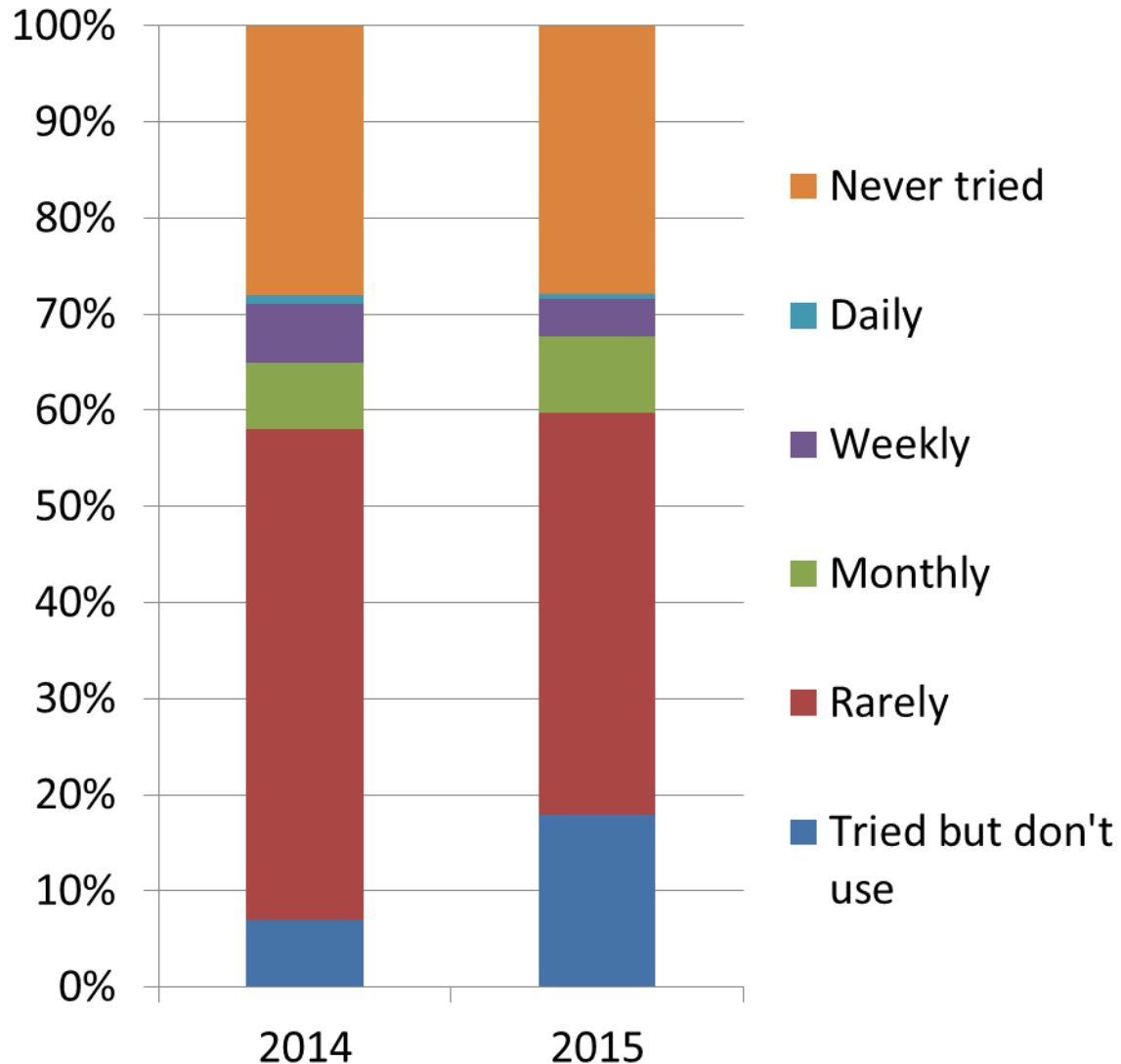


Taxi Usage

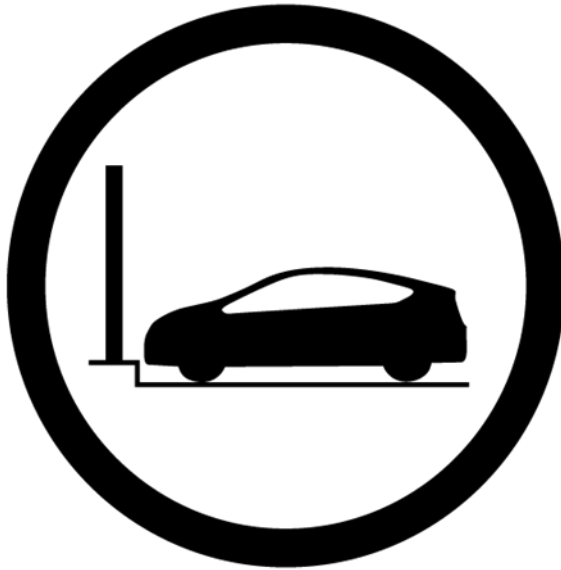


- Regular taxi usage appears to be declining among all Bay Area residents.
- In 2015, 75% of San Franciscans and 70% of other Bay Area residents used or tried a taxi

% of respondents who have tried/used taxis

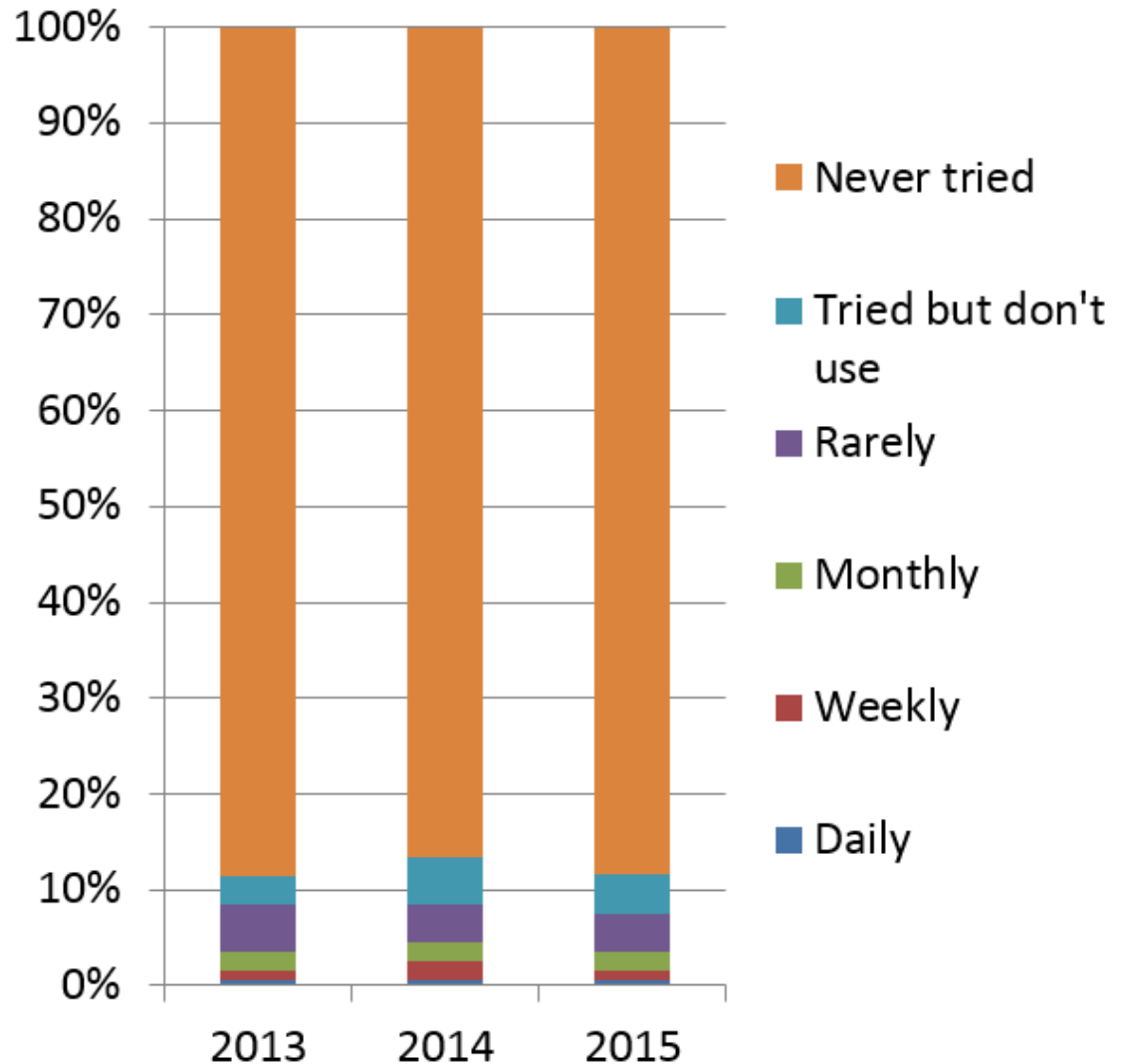


CarShare Usage



- 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

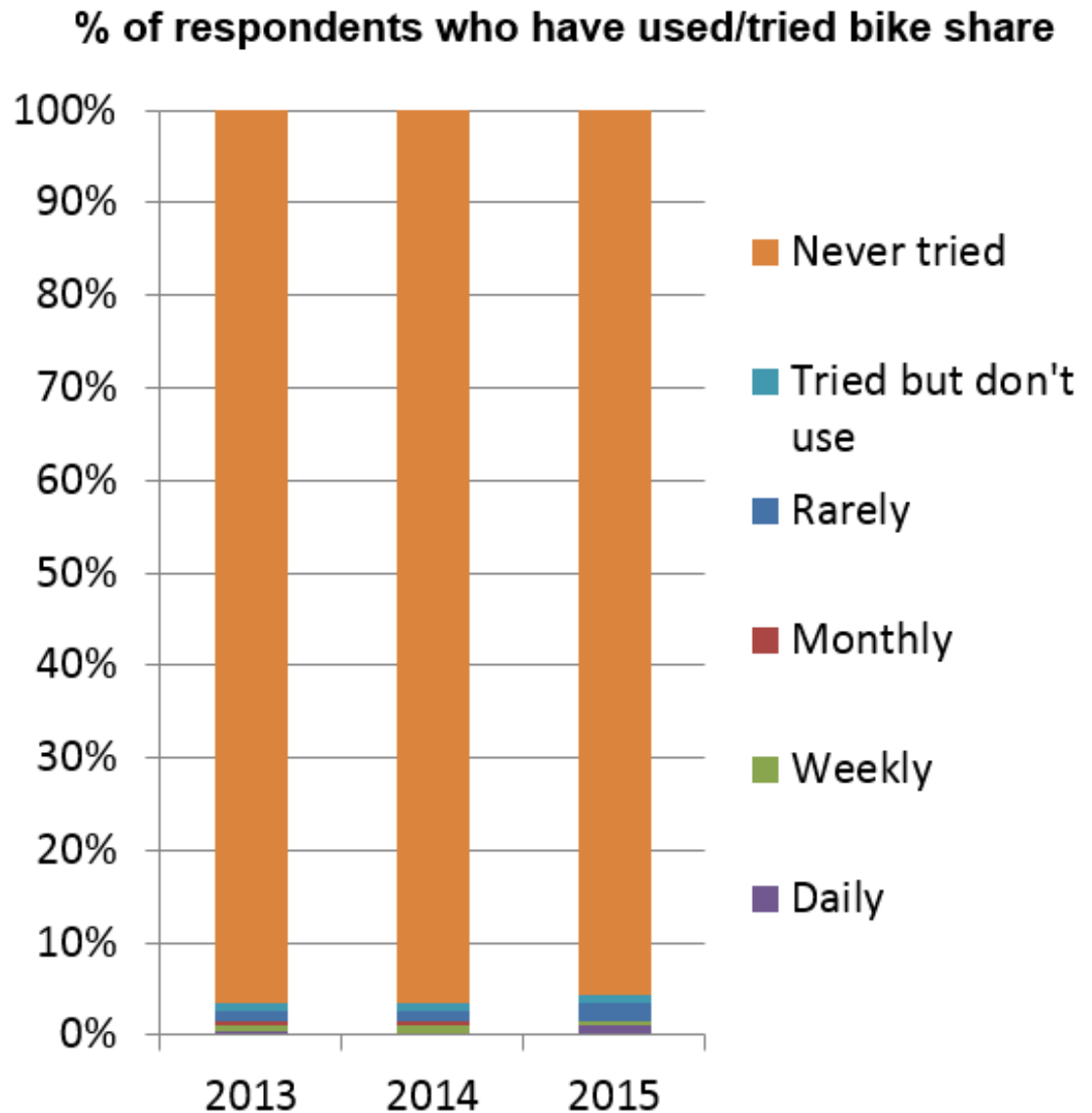
% of respondents who have tried/used CarShare



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



Questions and Suggestions?

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