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San Francisco Municipal Transportation Agency/ARUP

2015 Residential Parking Permit Program Resident Survey

May 2016

Overview and Research Objectives

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The San Francisco Municipal Transportation Agency or SFMTA, through Arup, commissioned Godbe Research to conduct a survey of San Francisco residents on the SFMTA residential parking permit or RPP program with the following research objectives:

- Evaluate perception of the overall quality of life in San Francisco;
- Assess general awareness of the RPP program as well as participation in the program;
- Evaluate current on-street parking conditions in the City;
- Evaluate mode choice and commute preferences;
- Identify home zip code and County of work or school (where applicable);
- Assess off-street parking for those residents who have access;
- Determine support for potential future RPP program policy actions, and;
- Identify any differences in voter support due to demographic, geographic, and/or behavioral characteristics.

Methodology Overview

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➢ Data Collection	Internet interviewing
➢ Universe	707,964 residents in the City of San Francisco.
➢ Fielding Dates	November 21 through December 15, 2015
➢ Interview Length	41-questions / 20-minutes
➢ Languages	English, Spanish, Chinese (traditional), and Tagalog
➢ Sample Size	n=2,349
➢ Margin of Error	± 2.02% at the 95% confidence level

Note: The data have been weighted to reflect the actual population characteristics of residents in the City of San Francisco in terms of their gender, age, ethnicity, and area of residence.

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Key Findings

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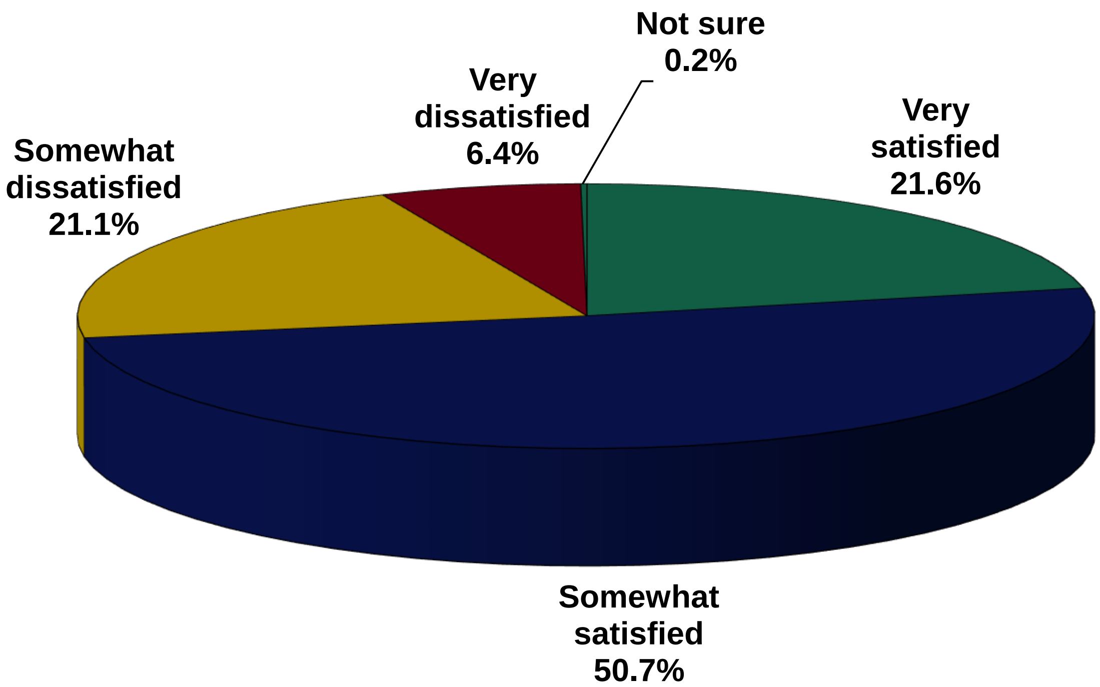
RPP Area Questions

Q1. Satisfaction With Quality of Life in SF (n=2,349)

As the first question in the survey, survey respondents were asked how satisfied they are with the quality of life in San Francisco. Slightly less than three-quarters (72%) of residents are 'satisfied' (very satisfied or somewhat satisfied) with the quality of life in San Francisco, where slightly more than one-quarter (28%) are 'dissatisfied' (very dissatisfied or somewhat dissatisfied) .



Q2. Awareness of Residential Parking Permit (RPP) Program (n=2,349)

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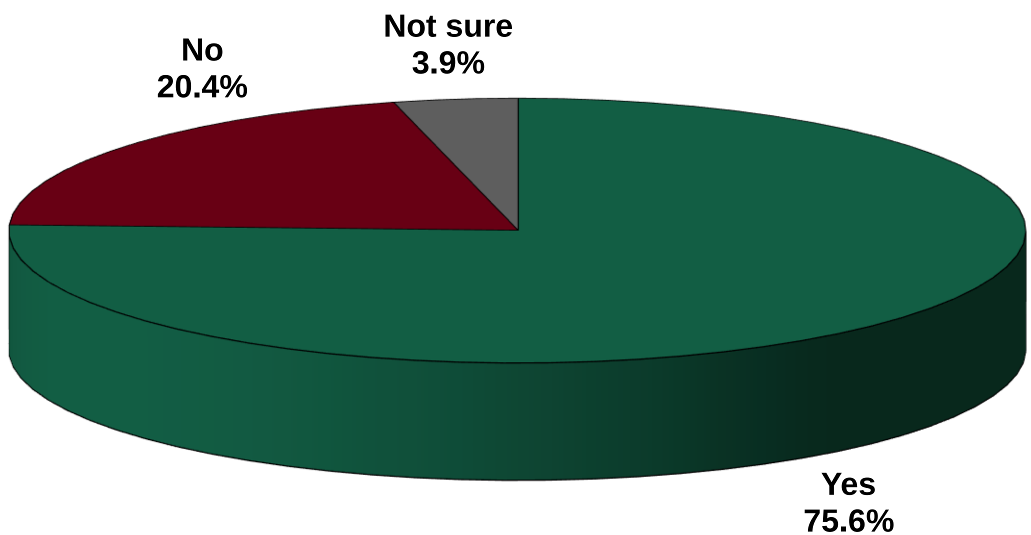
Next, survey respondents were asked their unaided awareness of the RPP program, with just over three-quarters (76%) of residents indicating that they are aware of the RPP program. This is quite high given that the survey included both RPP and non-RPP areas and no information about the SFMTA or RPP program had been presented to respondents prior to this question other than a brief introduction in the email recruitment method. Conversely, only one-fifth (20%) of residents indicated a lack of awareness of the RPP program.



Q3. Home Located in RPP Program Area (n=1,777)

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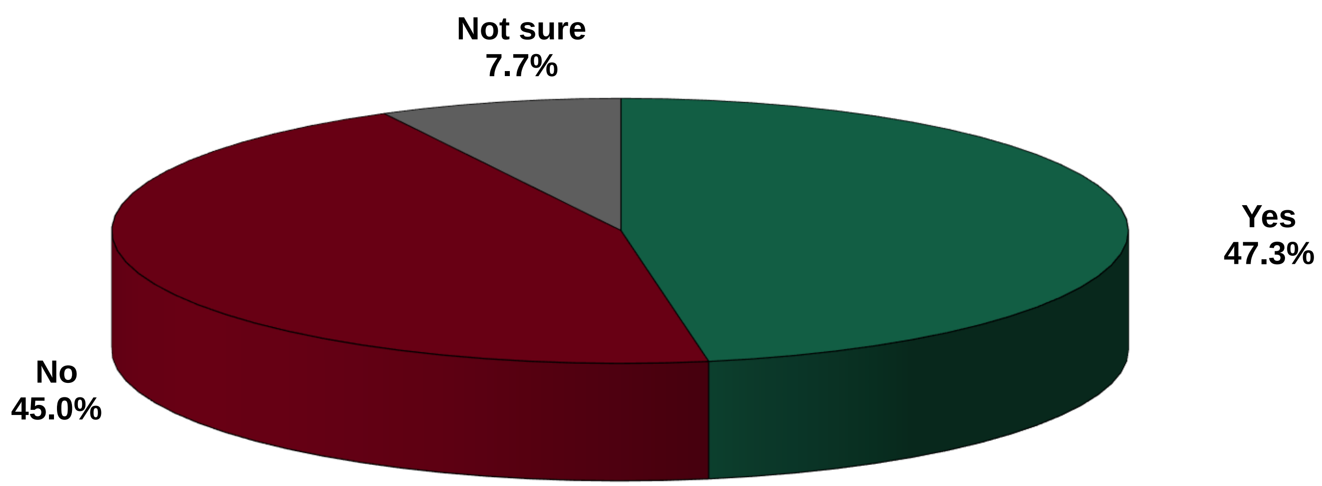
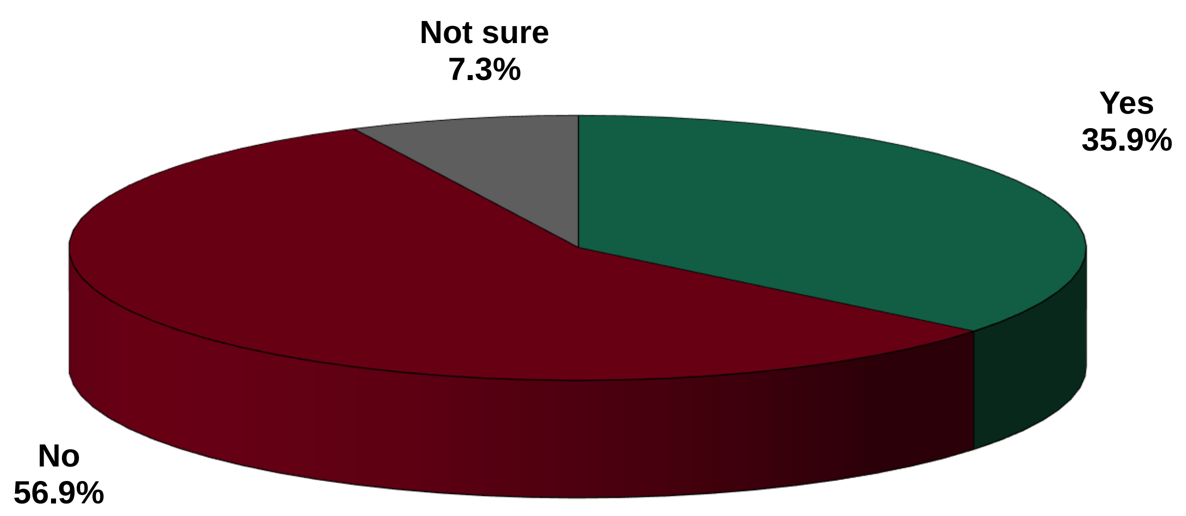
After asking the question on un-aided awareness of the RPP program, survey respondents who indicated awareness of the program were next asked if their home is located in a designated RPP area. Of those residents, slightly less than half (47%) indicated that there home is located in a designated RPP area.



Q4. Interest in Learning More About the RPP Program (n=1,509)

Respondents who indicated a lack of awareness of the RPP program in general (Q2) or who indicated that their home is not located in a designated RPP program area (Q3), were next asked if they were interested in receiving information about the RPP program after having been read a short introduction about the program. Of these respondents, more than one-third (36%) indicated that they would be interested in receiving more information about the RPP program.



Q5. Designated Home RPP Program Area (n=840)

Residents who indicated in that they currently live in a designated RPP program area (Q3) were next asked what RPP program area they live in. The table below shows the breakdown of survey respondents by specific RPP area based on their answer to this question, of they are 'not sure' of the specific RPP program area in which they live.

A	11.0%	**K**	2.2%	**U**	2.4%
B	0.3%	**L**	2.1%	**V**	1.7%
C	5.5%	**M**	3.5%	**W**	0.8%
D	1.8%	**N**	4.7%	**X**	1.1%
E	1.4%	**O**	2.2%	**Y**	2.1%
F	1.0%	**P**	1.2%	**Z**	1.9%
G	5.5%	**Q**	4.1%	**BB**	0.5%
H	0.7%	**R**	1.0%	**CC**	0.2%
I	2.2%	**S**	12.5%	**DD**	0.3%
J	6.2%	**T**	1.6%	**Not sure**	18.3%

Q6. Have an Annual RPP Program Permit (n=840)

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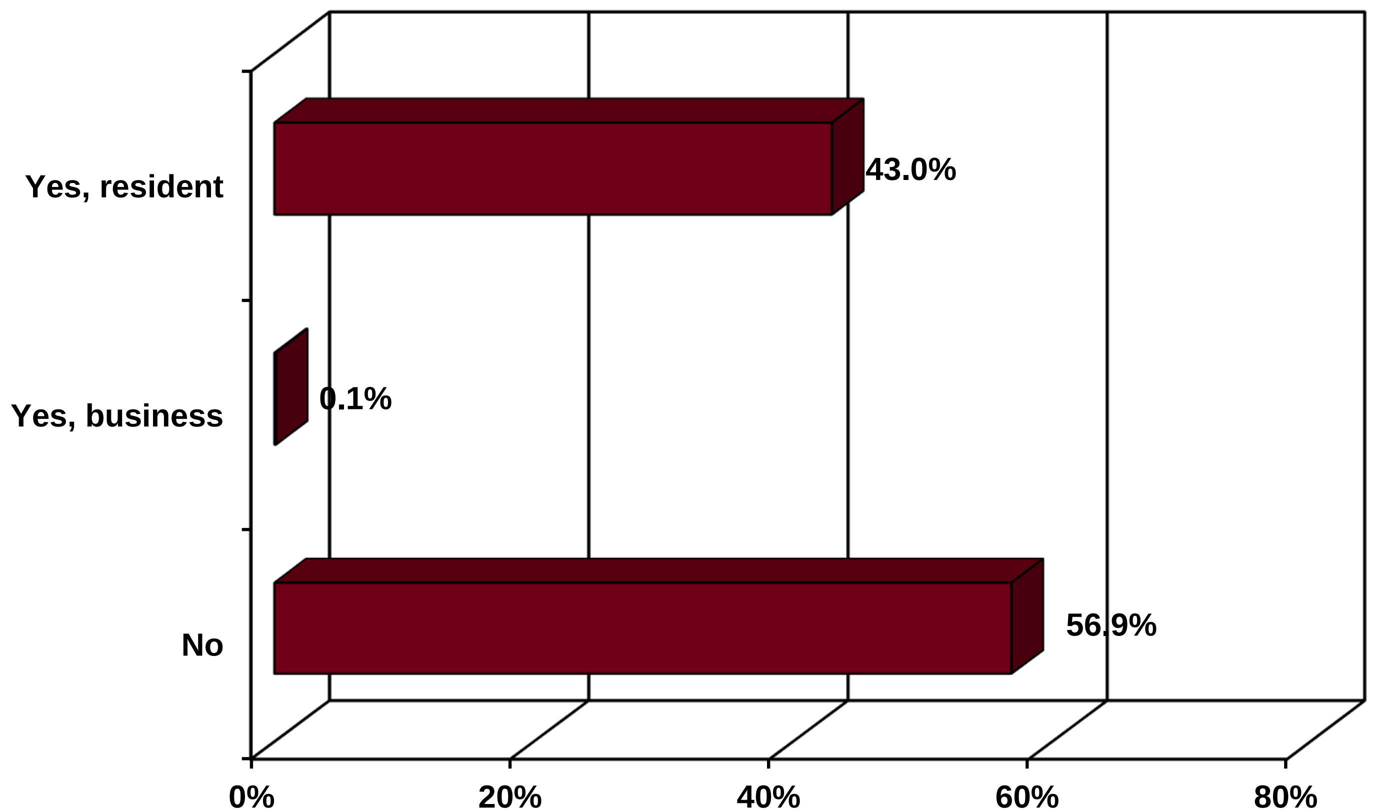
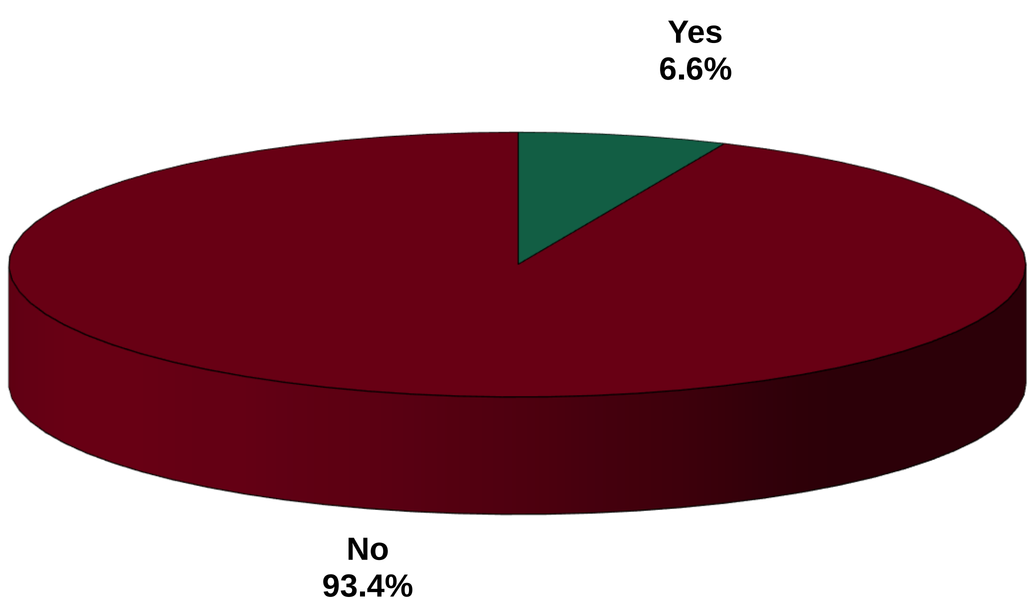
Residents who indicated in that they currently live in a designated RPP program area (Q3) were next asked if they currently have an annual RPP, and if that permit is a resident, business, or contractor permit with multiple responses accepted for this question. Slightly more than four in ten (43%) residents who indicate currently living in a designated RPP program area and indicated that they have an annual resident permit, where slightly less than six in ten (57%) residents indicated that they do not currently have an annual RPP.



Q7. Have a Handicap Placard for On-Street Parking in SF (n=478)

As a follow-up to Q6 (Do you currently have an annual RPP?), respondents who indicated that they do not currently have an annual RPP in any form (resident, business, or contractor) were next asked if they have a handicap placard for on-street parking, with more than 9 in 10 (93%) residents indicating that they do not have a handicap placard. Fewer than one in ten (7%) of residents indicated having a handicap placard for on-street parking.



Q8. Number of Annual RPP Program Permits for Home or Business (n=362)

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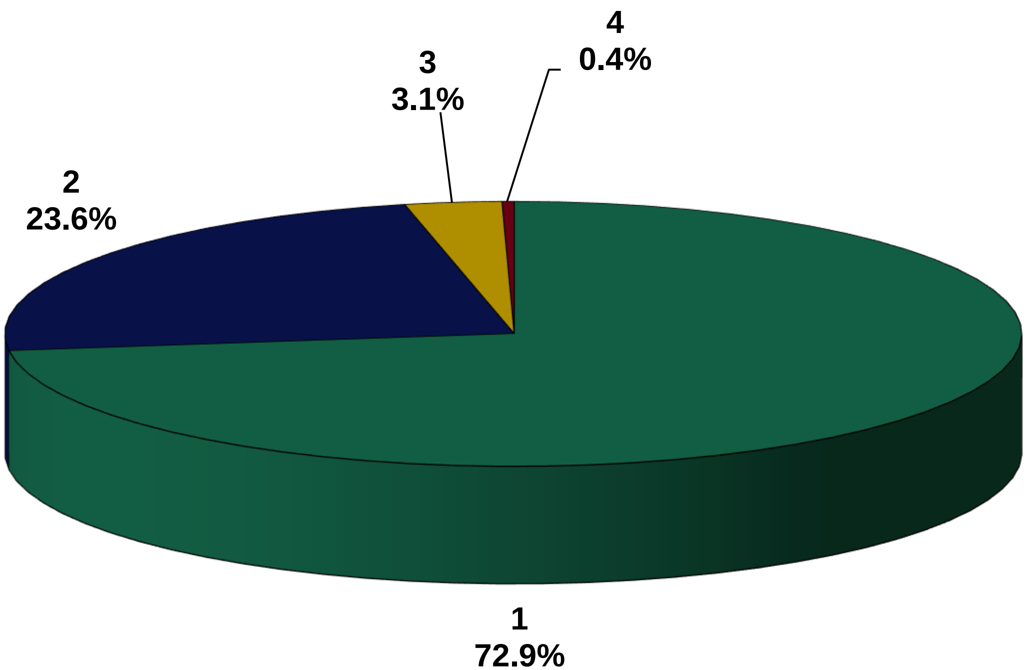
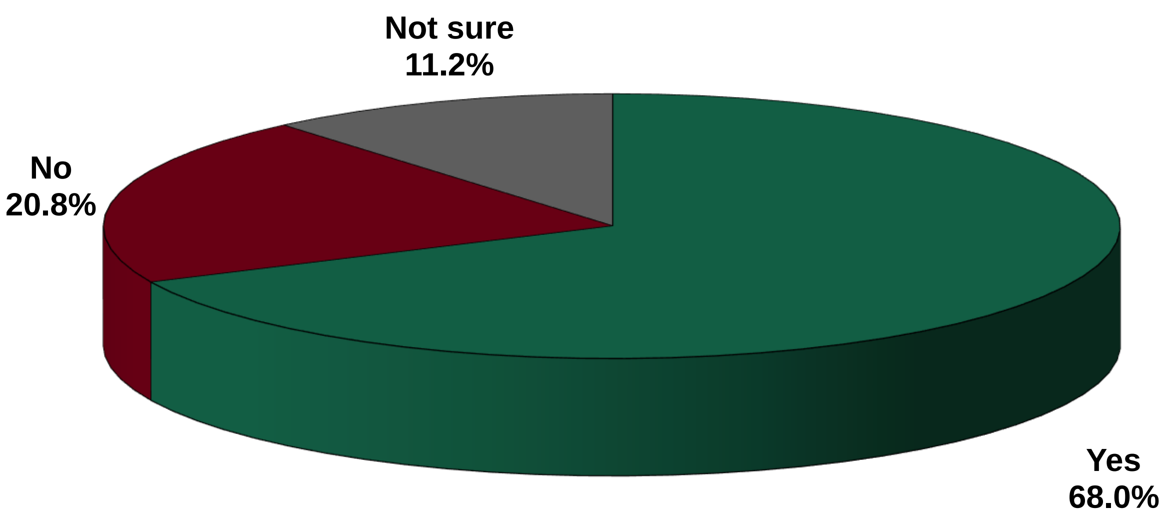
Beginning another series of follow-up questions to Q6 (Do you currently have an annual RPP?), respondents who indicated that they currently have an annual RPP in any form (resident, business, or contractor) were next asked how many annual RPP's they have for their home or business. Almost three-quarters (74%) of residents indicated having a single annual RPP, and significantly more than 9 in 10 (97%) residents indicate having 1 or 2 annual residential parking permits under the RPP program.



Q9. Opinion on Whether the Annual RPP is a Good Value (n=362)

Respondents who indicated currently having an annual RPP (Q6) were also asked about their perception of whether the annual RPP is a good value for the price. More than two-thirds (68%) of residents who have an annual RPP find the permit to be a good value for the price they paid. Conversely, only slightly more than one-fifth (21%) of residents indicated that they do not find the annual RPP to be a good value for the price.



Q10. Length of Time to Find Parking (n=362)

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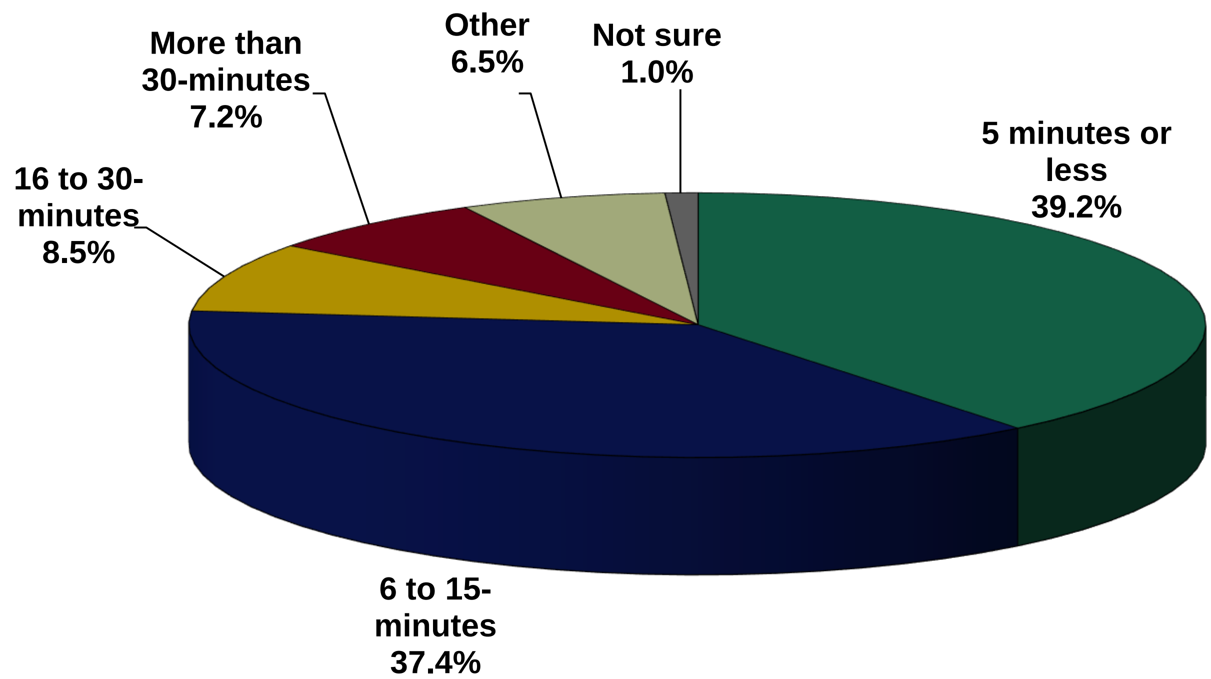
Respondents who indicated currently having an annual RPP (Q6) were next asked how long it took to find parking when they arrived home on their most recent car or other vehicle trip in terms of number of minutes. Just slightly less than four in ten residents (39%) indicated that it took them 5-minutes or less to find parking, and slightly more than three-quarters (77%) of residents indicated that it took them 15-minutes or less to find parking.



Q11. Distance From Home to Find Parking (n=362)

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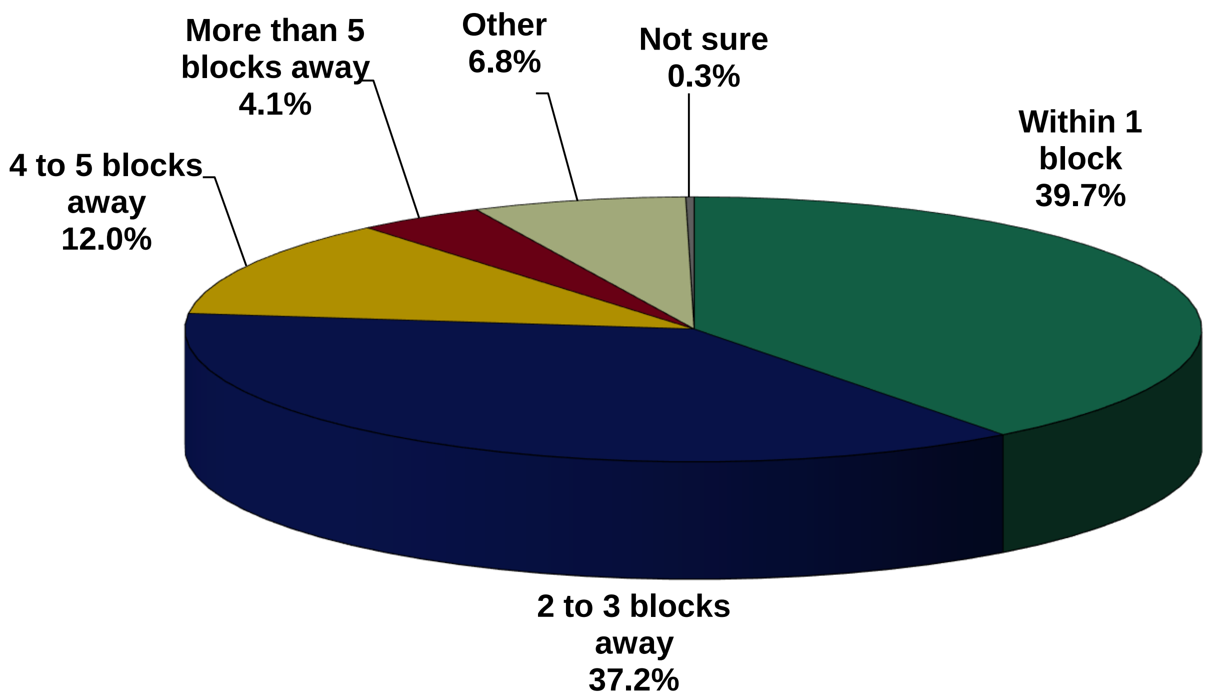
Respondents who indicated having an annual RPP (Q6) were also asked the distance from their home they had to park on their most recent car or other vehicle trip. Correlating with the time it takes to find parking, four in ten residents (40%) indicated that they found parking within one block of their home, and slightly more than three-quarters (77%) of residents indicated that they founding parking within three blocks of their home.



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Short Term Permit Questions

Q12. Awareness of RPP Program Short Term Permit for Visitors/Non-Owned Cars (n=840)

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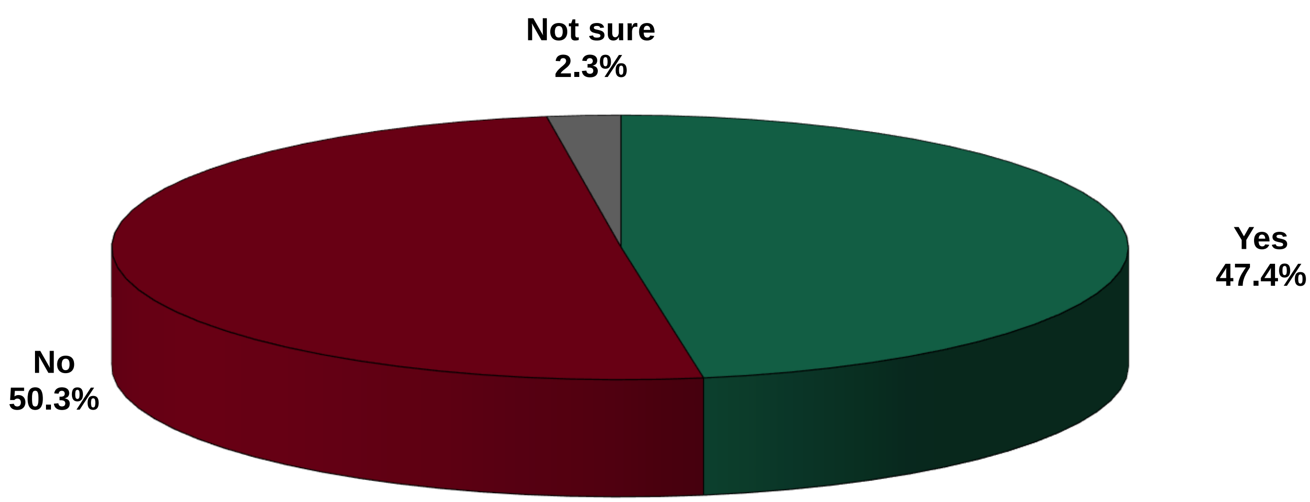
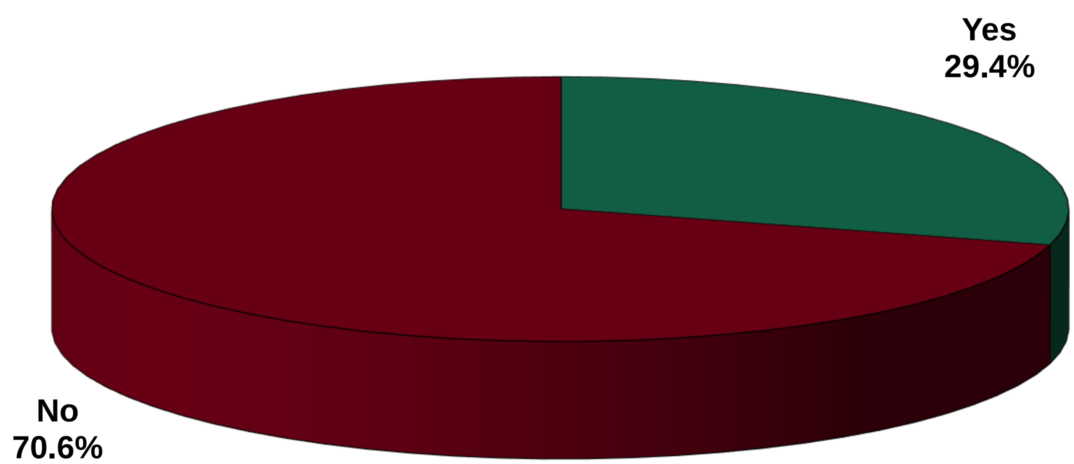
As question 12 in the survey, residents who indicated that they live in a designated RPP area (Q3) but do not currently have an annual RPP (Q6) were asked if they are aware of the RPP program short-term permit for visitors, and for borrowed or rented cars. Slightly less than half (47%) of respondents indicated that they are aware of the RPP program short-term permits, however, half (50%) of respondents indicated a lack of awareness of short-term permits under the RPP program.



Q13. Purchased a Short Term Permit Under the RPP Program (n=398)

As a follow-up to Q12, residents who indicated awareness of short-term permits under the RPP program were next asked if they had ever purchased a short-term permit. More than one-quarter (29%) of respondents indicated that they had purchased a short-term permit, with slightly more than seven in ten (71%) of respondents indicating that they had not purchased a short-term permit.



Q14. Reasons for Purchasing a Short Term Permit (n=117)

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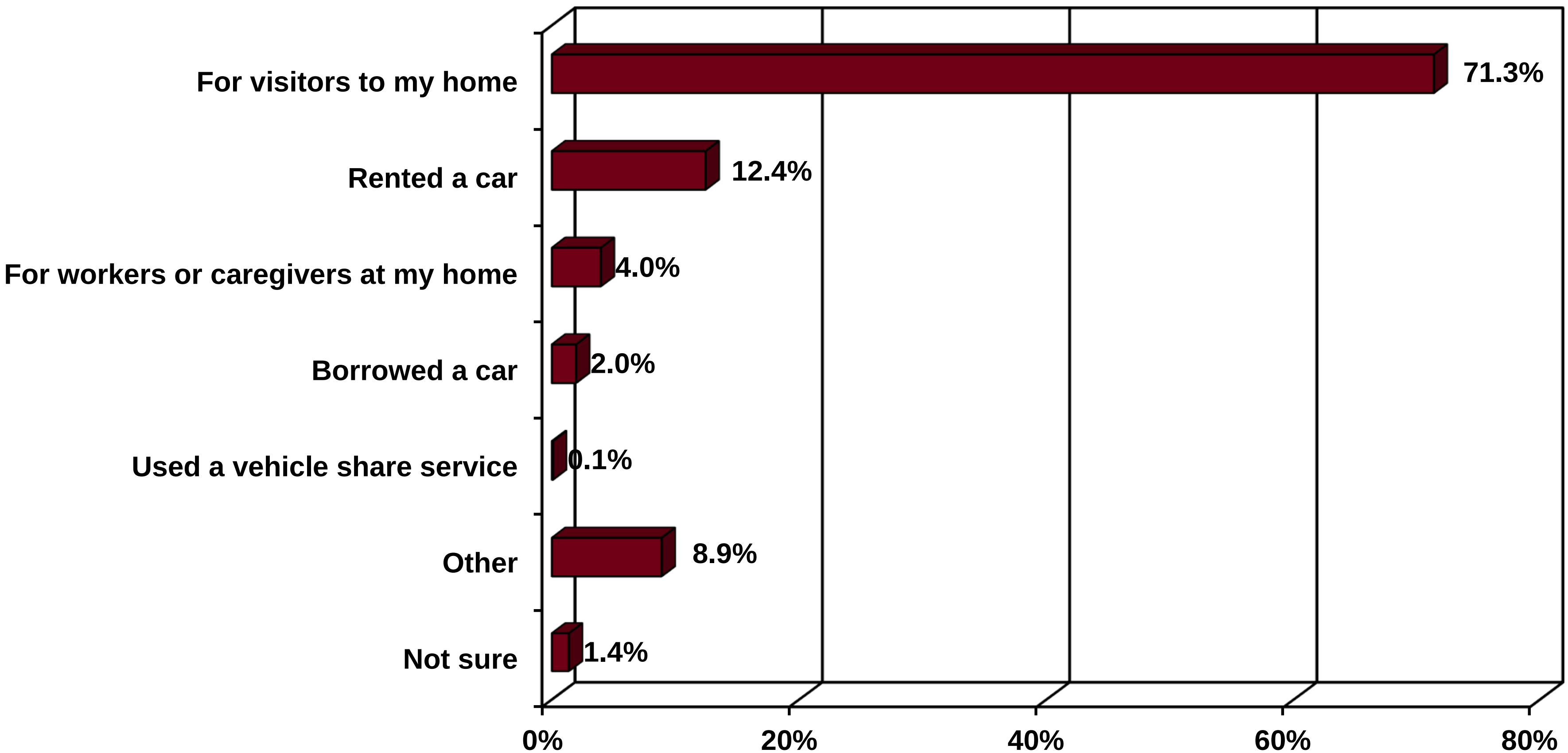
As the final short-term permit question, respondents who indicated purchasing a short-term permit in Q13 were asked why they purchased a short-term permit with the ability to select multiple responses, as needed. The most popular response to Q14 was ‘for visitors to my home’ $71%), with rented a car (12%) being the second most popular choice. While ‘other’ was the third most popular choice (9%), no sub-category within ‘other’ received more than 2%. Surprisingly, ‘used a vehicle share service’ received less than 1% of responses.



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Mode Choice and Work/Home Questions

Q15. Working Status (n=2,349)

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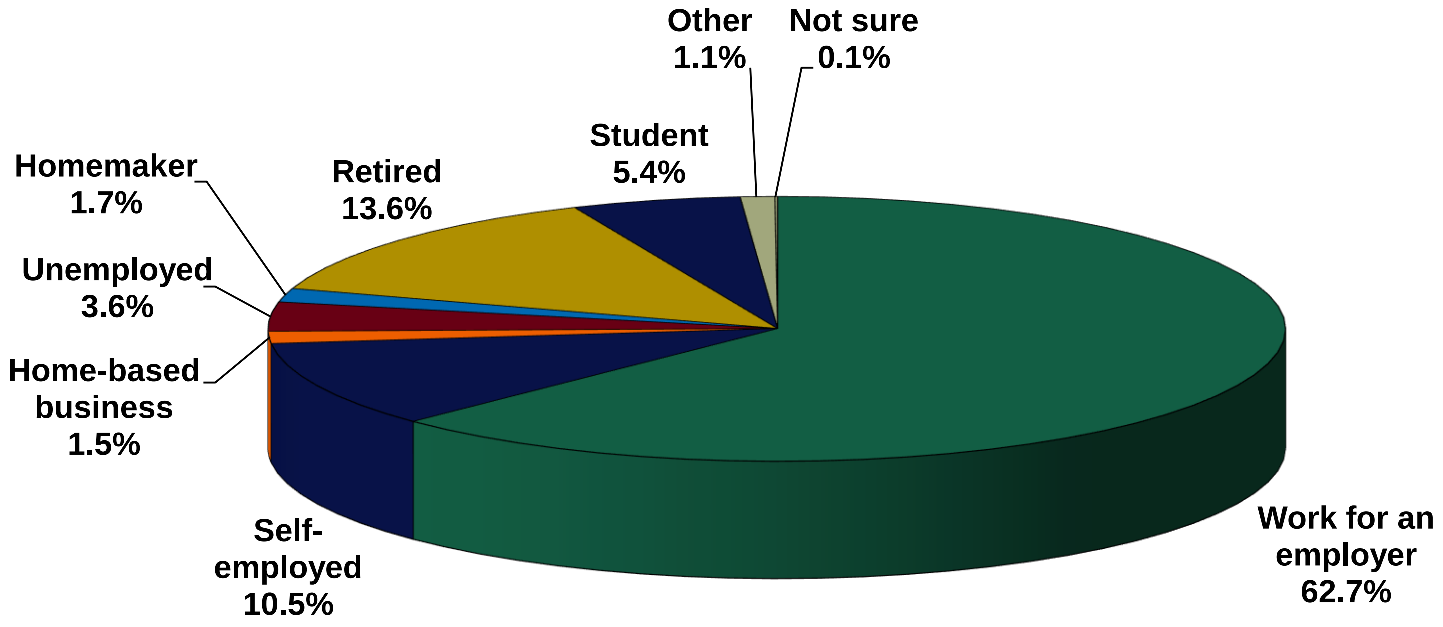
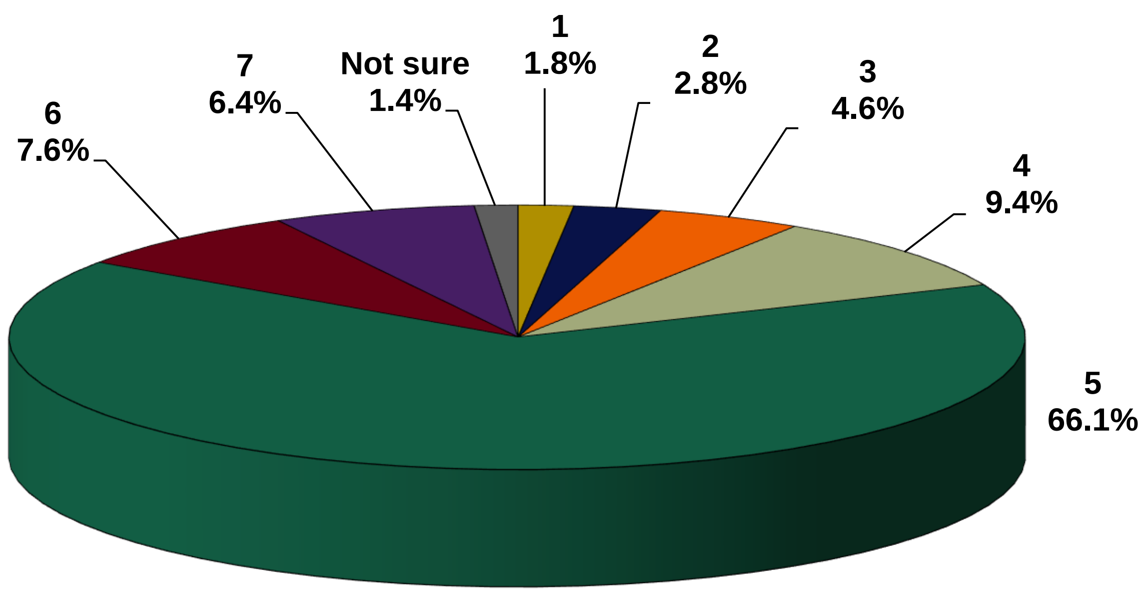
The next section of the survey had topics dealing with work status and location (destination), home location (origin), and preferred primary mode choice, the first of which were asked of all survey respondents. As the first question in this section, Q15 asked which best describes your working status. Slightly less than two-thirds (63%) of respondents indicated that they 'work for an employer' as the most popular response with the second most popular response being 'retired' (14%). As the third most popular response, slightly more than one in ten (11%) residents indicated that they are 'self-employed'. No other response category received more than 10% of responses.



Q16. Number of Days Each Week Leaving the Home for Work or School (n=1,871)

Residents who indicated that they 'work for an employer', are 'self-employed' , are a 'student', or 'other' were then asked a follow-up question regarding the number of days per week they leave home to go to work or school. Almost two-thirds (66%) of respondents indicated that they work or go to school five days per week and eight in ten (80%) of respondents indicated that they go to work or school five days a week or more.



Q17. County Locations for Work or School (n=1,871)

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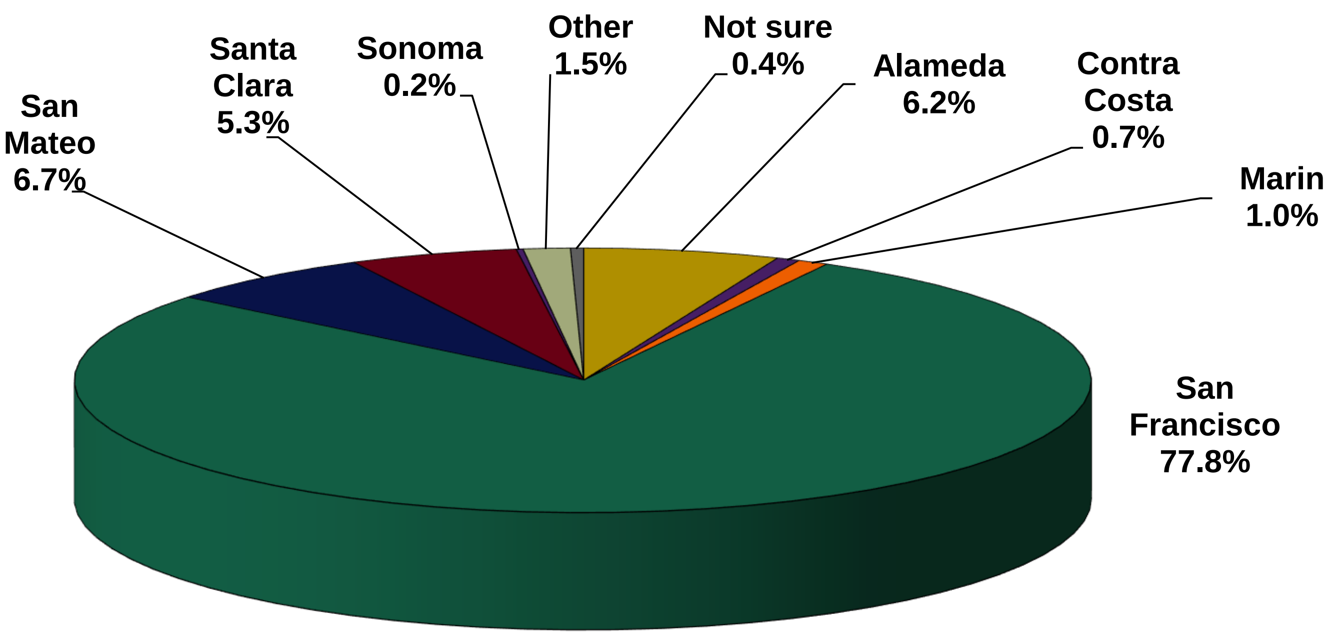
Similar to Q16, residents who indicated that they 'work for an employer', are 'self-employed' , are a 'student', or 'other' were also asked the County in which they go to work or school. As the most popular choice, more than three-quarters (78%) of residents indicated going to work or school in San Francisco. San Mateo, Alameda, and Santa Clara Counties were the next most popular responses with fewer than 10% of respondents selecting any of these Counties as their work or school location.



Q18. Work or School Zip Code (n=1,456)

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Respondents who indicated that they either work or go to school in San Francisco County in the previous question (Q17) were asked a follow-up question regarding the zip code of their work or school location. The most frequently mentioned zip code for respondents was 94015 with slightly more than one in ten (11%) of respondents selecting this specific zip code. 94102 and 94103 were the second most popular zip codes for work or school locations inside San Francisco with 10% of respondents selecting each zip code.

94102	10.2%	**94114**	2.0%	**94129**	0.9%
94103	10.3%	**94115**	2.6%	**94130**	0.0%
94104	5.5%	**94116**	1.1%	**94131**	0.6%
94105	11.2%	**94117**	1.9%	**94132**	4.3%
94107	5.5%	**94118**	3.0%	**94133**	2.0%
94108	2.4%	**94121**	1.6%	**94134**	1.2%
94109	3.4%	**94122**	2.2%	**94158**	1.9%
94110	5.2%	**94123**	1.7%	**Other**	2.6%
94111	6.9%	**94124**	2.8%	**Not sure**	1.9%
94112	4.5%	**94127**	0.6%		

Q19. Usual Transportation Methods for Getting to School or Work (n=1,871)

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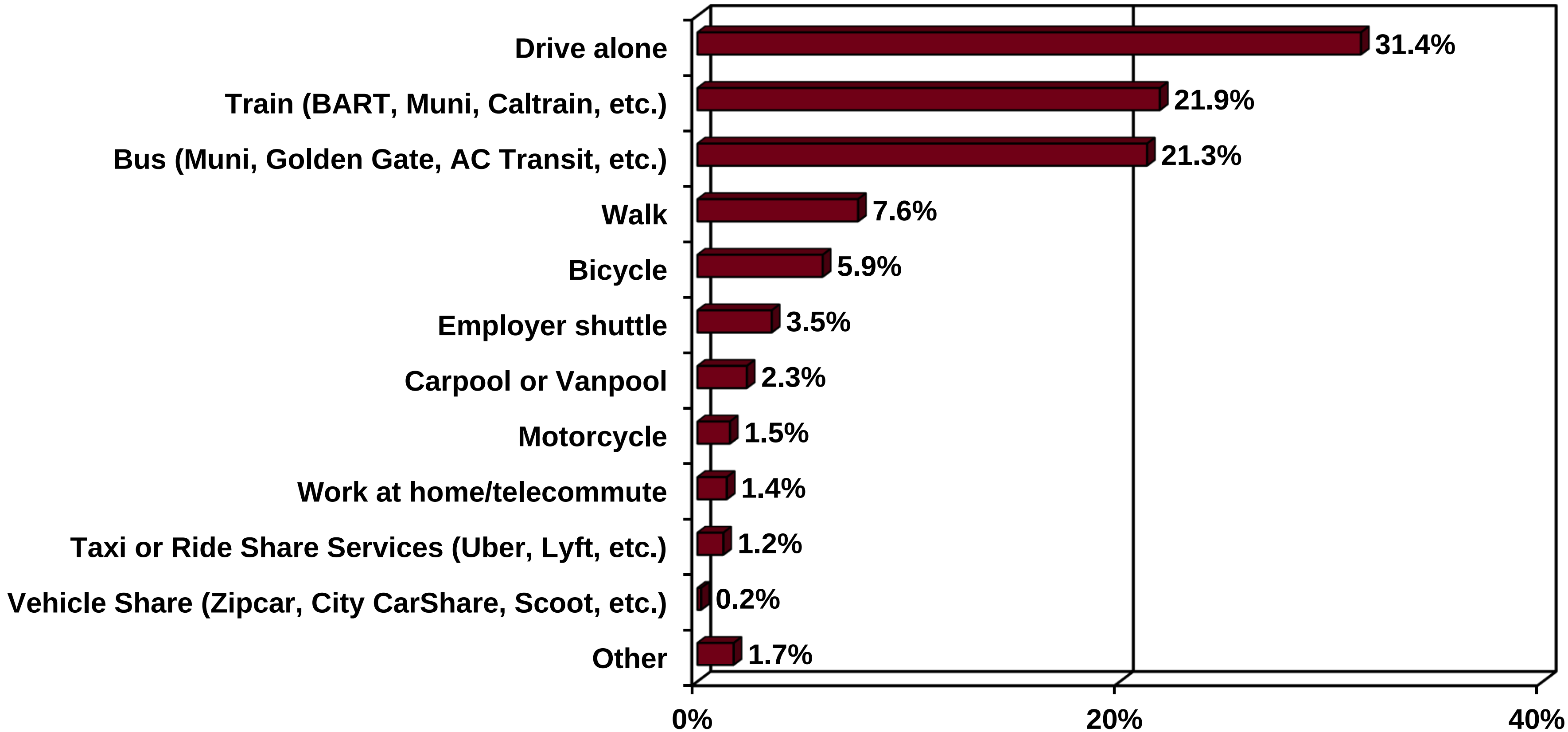
The next question on the commute mode typically used to get to work or school was asked of any respondent who indicated that they ‘work for an employer’, are ‘self-employed’ , are a ‘student’, or ‘other’. While the most popular response, still fewer than one-third (31%) of respondents indicated that they usually ‘drive alone’. Conversely, slightly almost two-thirds (64%) of respondents indicated some sort of alternative form of transportation such as ‘train’, ‘bus’, ‘walk’, ‘bicycle’, ‘employer shuttle’, ‘carpool or vanpool’, or ‘taxi or ride share service’



Q20. Method of Transportation to Access Commute Transportation (n=921)

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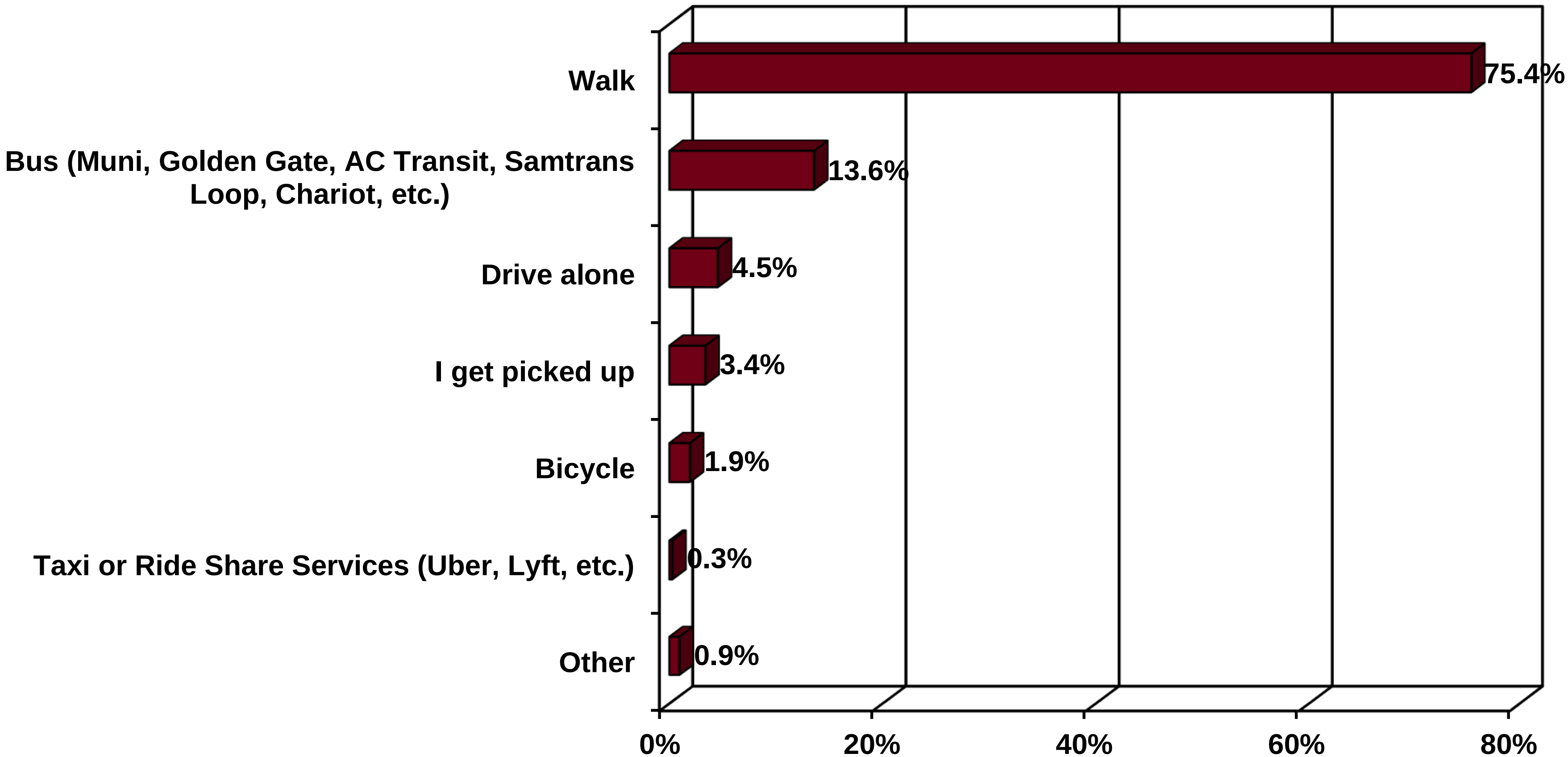
As a follow-up to Q19, respondents who indicated that they usually commute via alternative transportation such as ‘train’, ‘bus’, ‘ferry’, ‘carpool or vanpool’, ‘employer shuttle’, or ‘vehicle share’ to get to work or school were asked how they access their primary mode of transportation. Three-quarters (75%) of respondents indicated that they ‘walk’ to access their primary commute mode, where only 5% of respondents indicated ‘drive alone’.



Q21. Home Zip Code (n=2,349)

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As the next topic in this section, all survey respondents were asked about their home zip code as Q21. Of all San Francisco zip codes, 94112 was the only zip codes to have more than 10% of respondents (11%), with zip codes 94109, 94110, 94114, 94116, 94117, 94118, 94121, 94122, and 94124 also being popular choices with between 5% and 7% of respondents selecting each of these as their home zip code.

94102	3.5%	**94114**	4.7%	**94129**	0.6%
94103	2.8%	**94115**	2.7%	**94130**	0.0%
94104	0.4%	**94116**	5.9%	**94131**	3.6%
94105	1.9%	**94117**	6.4%	**94132**	3.2%
94107	3.9%	**94118**	5.3%	**94133**	3.1%
94108	2.2%	**94121**	5.4%	**94134**	2.6%
94109	5.5%	**94122**	6.6%	**94158**	0.6%
94110	5.8%	**94123**	2.6%	**Other**	0.1%
94111	1.3%	**94124**	6.2%	**Prefer not to answer/ Not Sure**	0.1%
94112	10.7%	**94127**	2.4%		

Q22. Type of Home (n=2,349)

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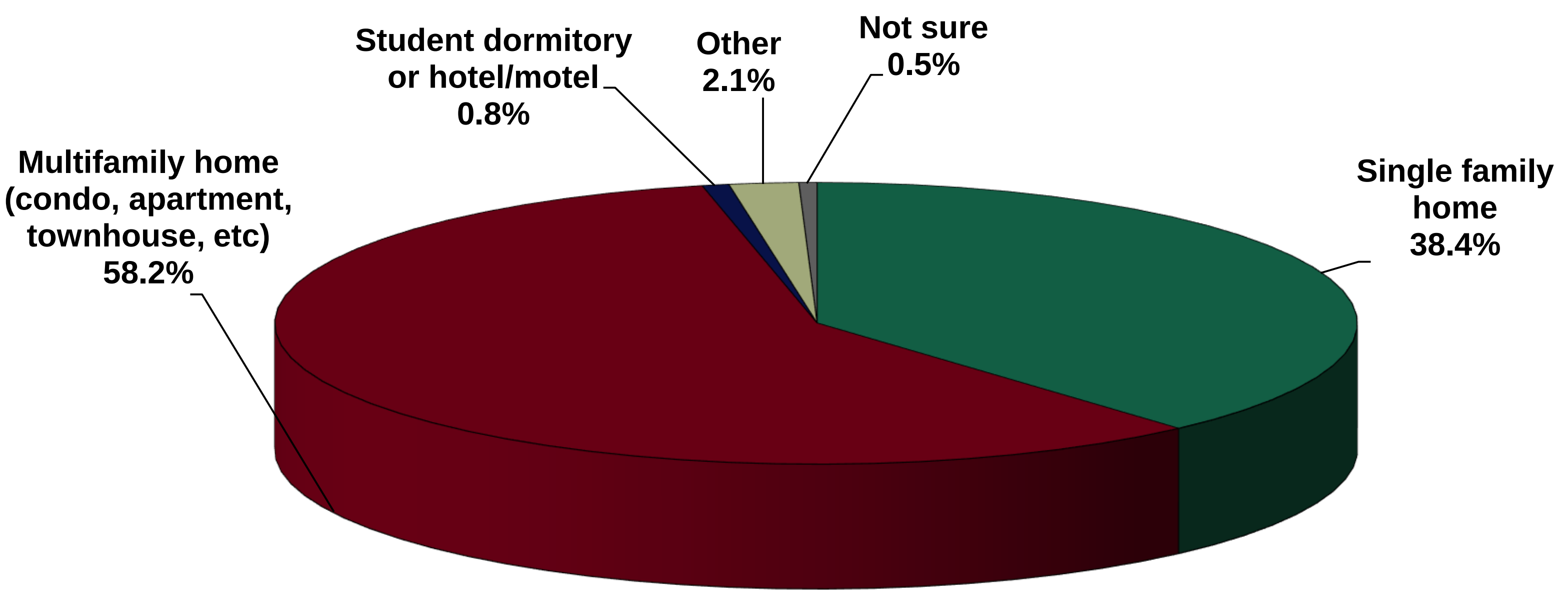
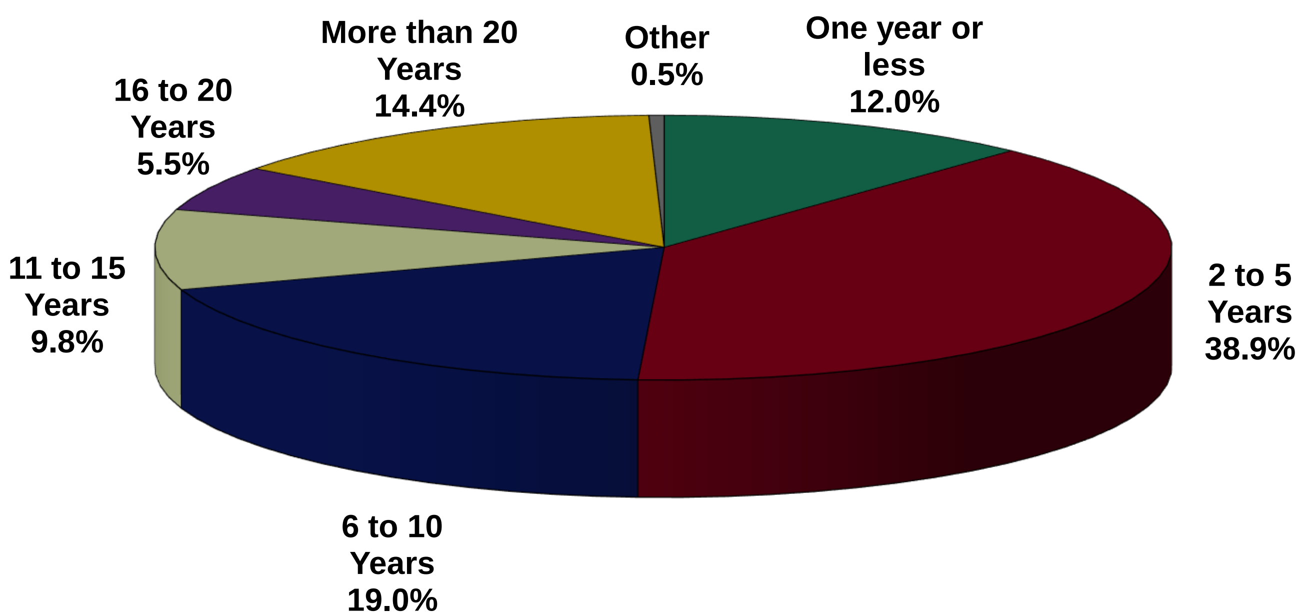
Following up on the previous home zip code question, Q22 next asked respondents about the type of dwelling the best describes their home. Almost 6 in 10 (58%) respondents indicated that they live in some sort of ‘multifamily home’, where fewer than four in ten (38%) respondents indicated living in a ‘single family home’.



Q23. Length of Residence in Current Home (n=2,349)

Respondents were next asked about their length of residence at their current home, regardless of the type of dwelling in which they live. ‘2 to 5 years’ was the most popular response with slightly less than four in ten (39%) of residents indicating this length of residence in their current home. Also, five years seems to be the median length of residence with about half of respondents indicating they have lived more than/less than five years in their current home.



Q24. Number of Employed Adults in Household (n=2,349)

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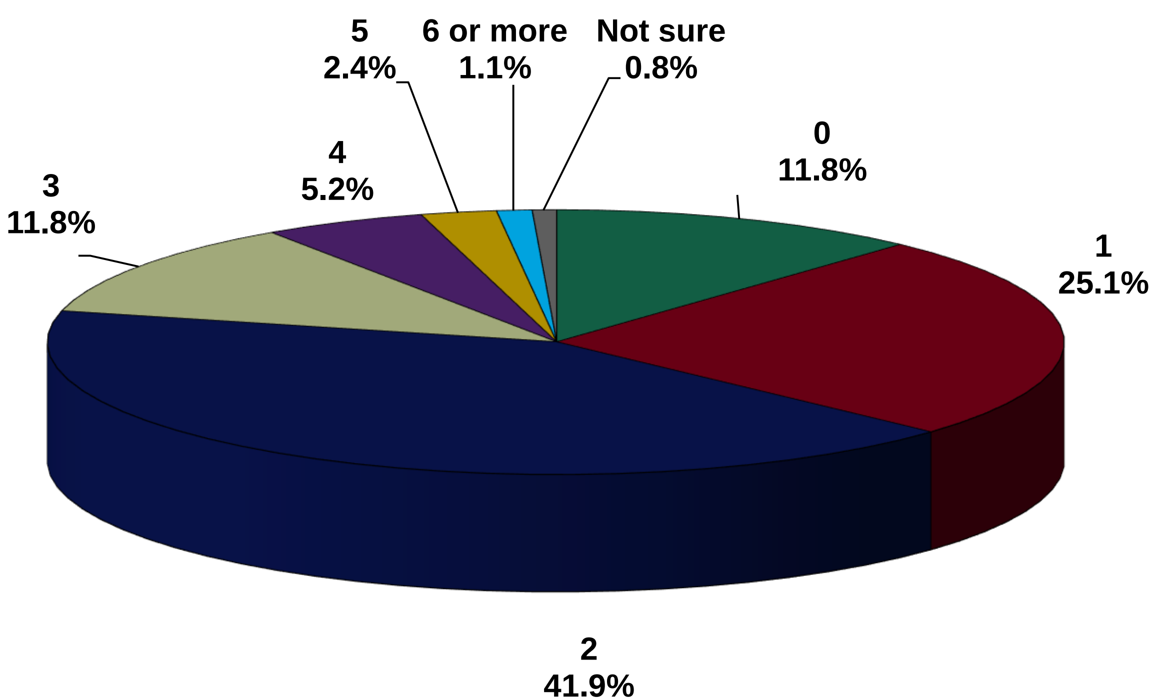
The next survey question asked respondents about the number of employed adults (age 18+) in their household. As the most popular choice, slightly more than four in ten (42%) of respondents indicated ‘two’ employed adults in their household with just over two-thirds (67%) of respondents selecting either ‘one’ or ‘two’ employed adults in their household.



Q25. Number of Children in Household (n=2,349)

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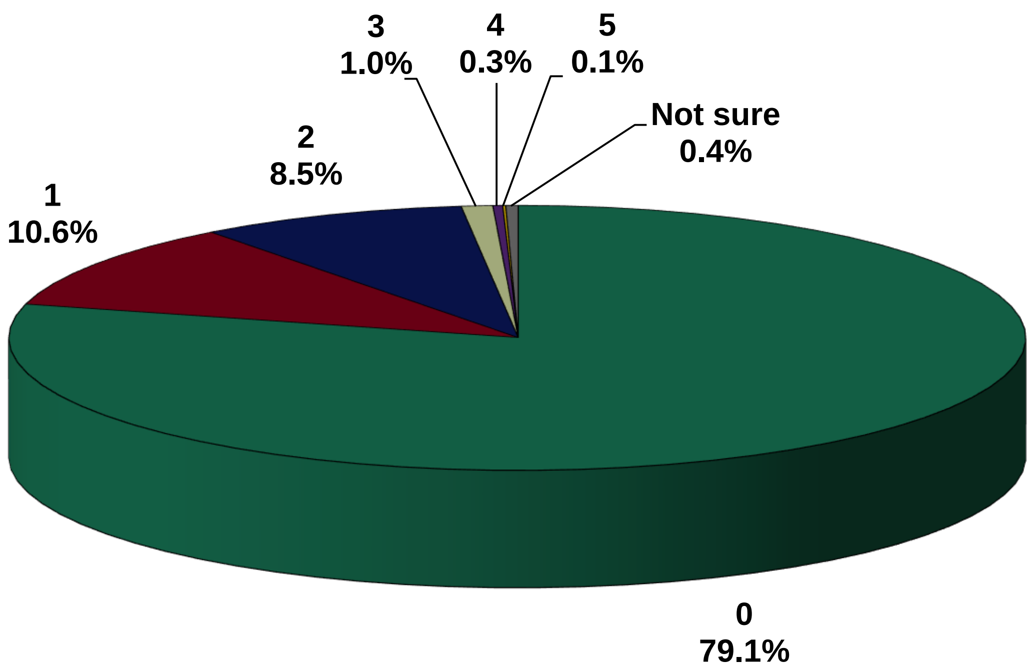
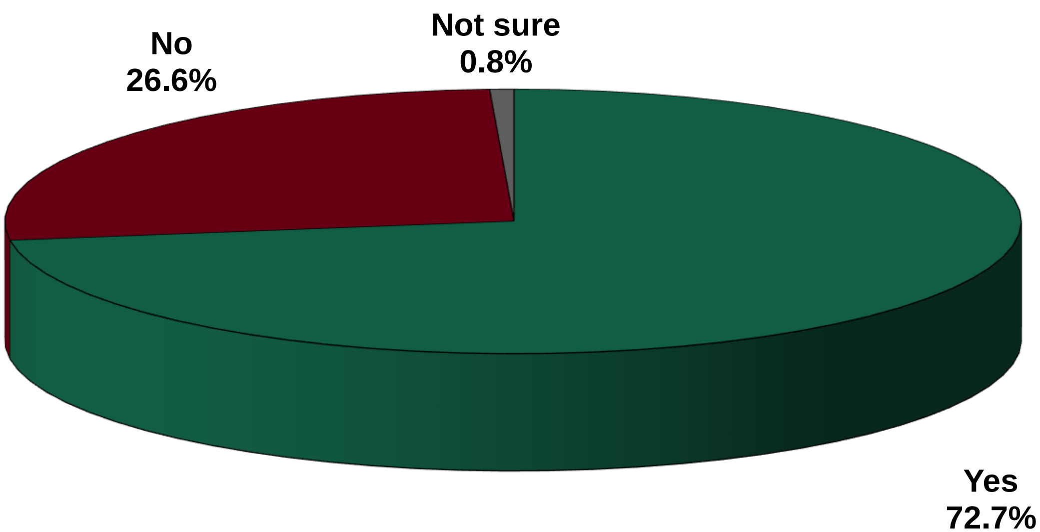
Dovetailing on Q24, respondents were next asked in Q25 about how many children (18 or under) they have living in their household. Surprisingly, almost eight in ten (79%) of respondents indicated having 'zero' children in their household. Of the respondents who indicated having children, 'one' was the most popular choice with slightly more than one in ten (11%) of respondents selecting this option.



Q26. Access to Motorized Vehicle for Personal Use (n=2,349)

As the next question, Q26 asked respondents if they currently have access to a motorized vehicle for their personal use. Slightly less than three-quarters (73%) of residents indicated having access to a motorized vehicle for their personal use, where slightly more than one-quarter (27%) indicated not having access to a motorized vehicle.



Q27. Motorized Vehicle is a Scooter or Motorcycle (n=1,707)

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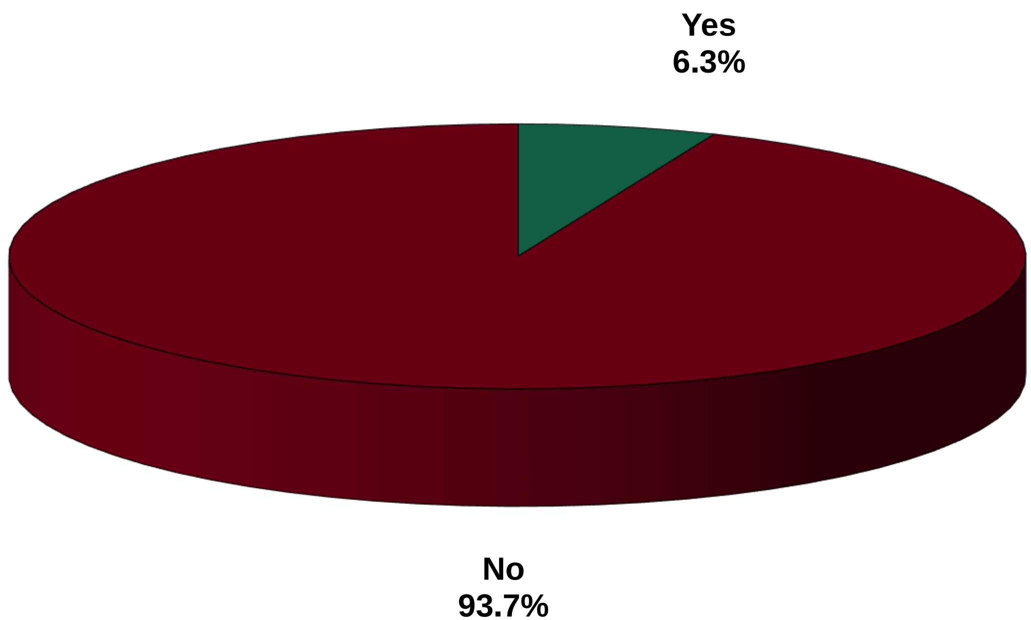
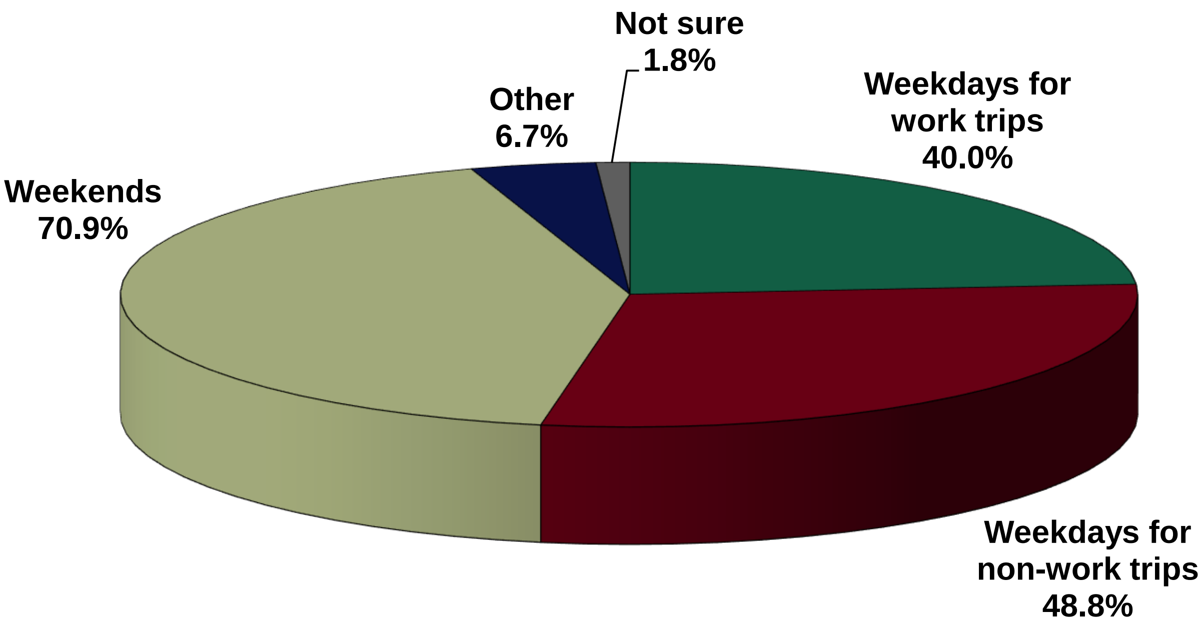
As a follow-up to Q26, respondents who answered ‘yes’ to having access to a motorized vehicle for their personal use were next asked a follow-up question about whether the motorized vehicle they have access to is a scooter or motorcycle. More than nine in ten (94%) residents indicated that the motorized vehicle for which they have access is <u>not</u> a scooter or motorcycle.



Q28. When Personal Motorized Vehicle is Used (n=1,707)

Respondents who answered ‘yes’ to having access to a motorized vehicle for their personal use (Q26) were also asked about when they typically use that motorized vehicle. For this question, respondents were allowed to select multiple options, thus the cumulative percentages area greater than 100%. More than seven in ten respondents indicated using their personal motorized vehicle on ‘weekends’, where slightly less than half (49%) indicated using their personal motorized vehicle on ‘weekdays for non-work trips’ . Finally, exactly four in ten (40%) of respondents indicated that they use their personal motorized vehicle on ‘weekdays for work trips’.



Q29. Number of Motorized Vehicles Available to Household (n=1,707)

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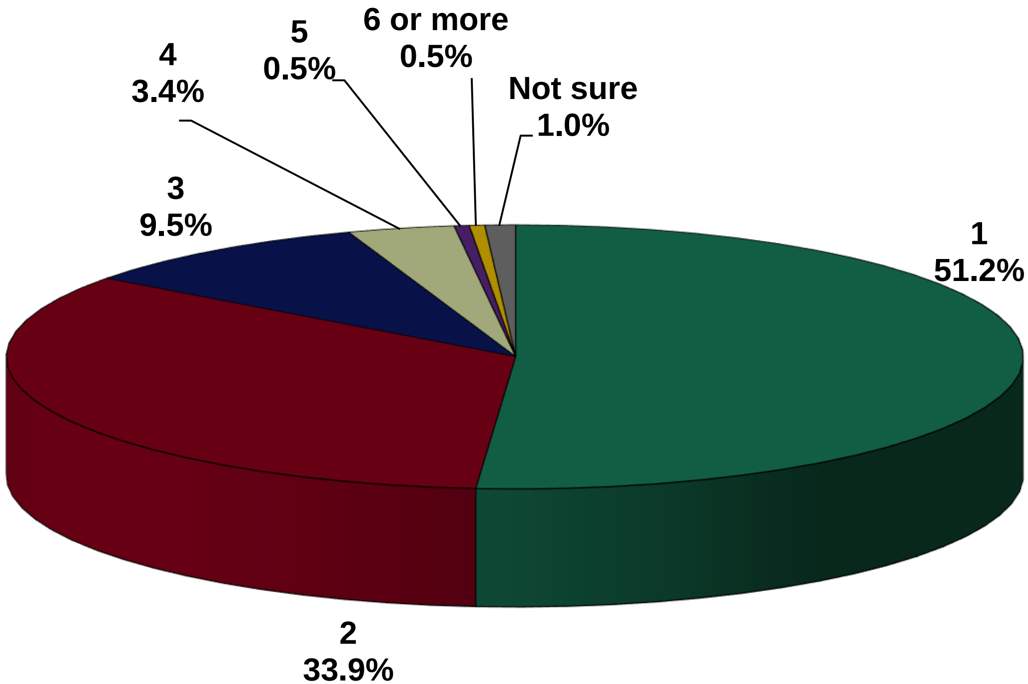
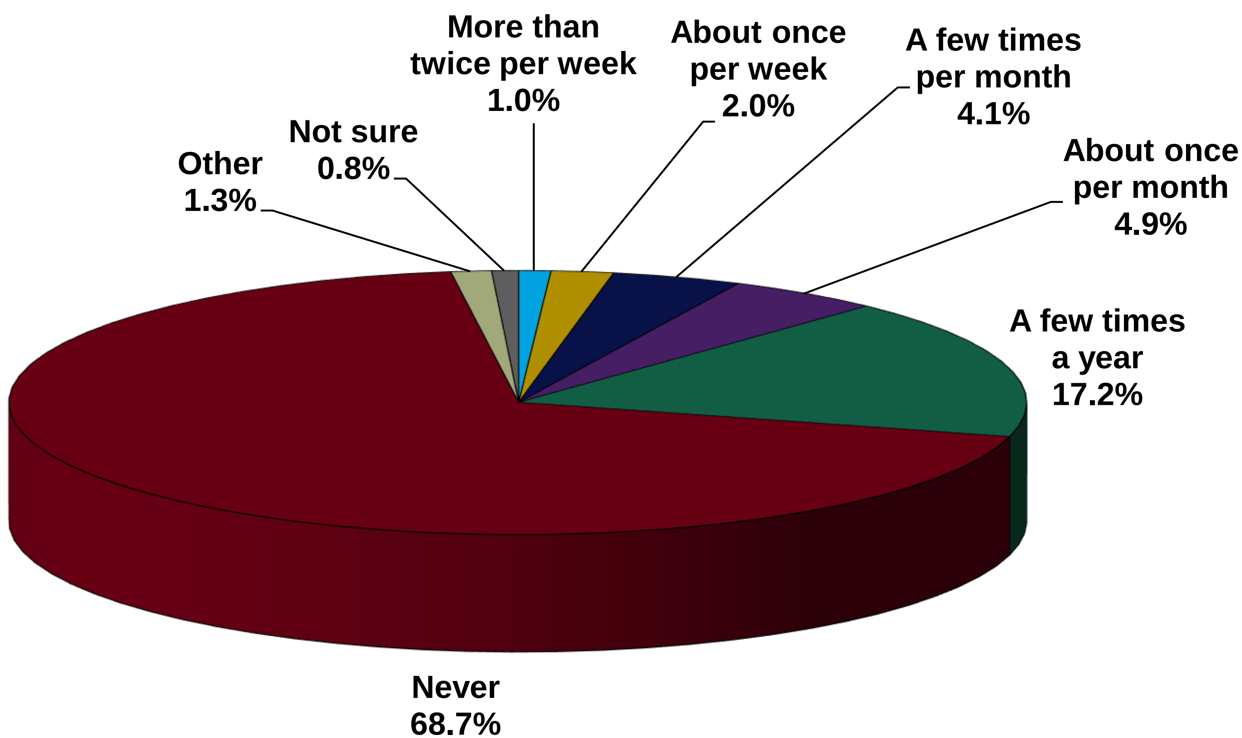
Finally, respondents who indicated that they had access to a motorized vehicle for their personal use in Q26 were asked about the number of motorized vehicles available to members of their specific household. Roughly half (51%) of respondents indicated that there is only one motorized vehicle available to members of their household as the most popular response. Slightly more than one-third (34%) of respondents indicated that there are two motorized vehicles available to members of their household. Finally, more than eight in ten respondents (85%) indicated that there are two or fewer motorized vehicles available to members of their household.



Q30. Use of Vehicle Sharing Services, or Borrowing or Renting a Vehicle for Local Travel (n=2,349)

As the final question in this section of the survey, Q30 asked all survey respondents about their frequency of usage (if any) of vehicle sharing services such as ZipCar, Scoot, or City CarShare, or if they rent or borrow a car to travel locally within the Bay Area. More than two-thirds (69%) of respondents indicated having never used a vehicle sharing service, or a rented or borrowed car to travel within the Bay Area, with slightly less than three in ten (31%) respondents indicating they had used a vehicle share service or had rented or borrowed a car. Of the respondents who answered in the affirmative, 'a few times a year' was the most popular response with slightly less than two in ten (17%) of respondents choosing this response.



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Parking Availability Questions

Q31. Access to Off-Street Parking (n=1,707)

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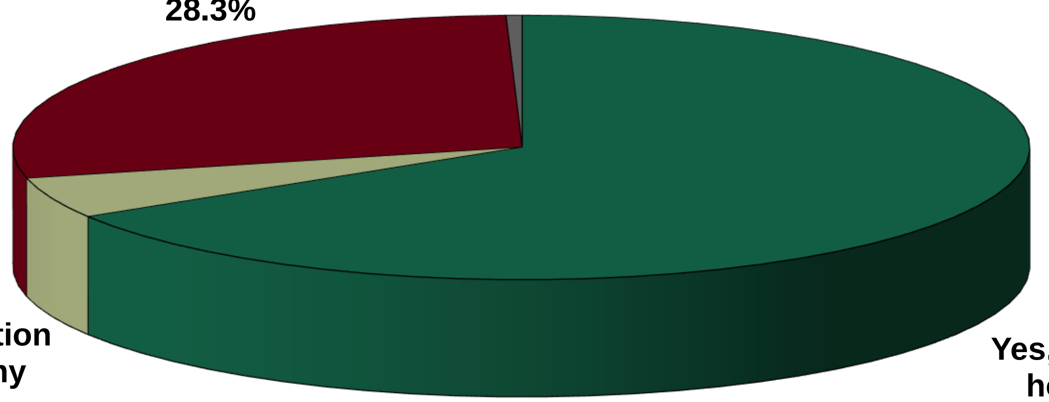
The next few questions in the survey had to do with off-street parking and Q31 was asked of any respondent who answered that they had access to a motorized vehicle for their personal use in Q26. Of those respondents almost two-thirds (66%) indicated that they had access to off-street parking 'at their home', where more than one-quarter (28%) indicated that they did not have access to off-street parking in any format. One in twenty (5%) of respondents indicated that they had access to off-street parking, however, it is at a location 'that is not at their home'.



Q32. Payment Methods for Off-Street Parking (n=1,216)

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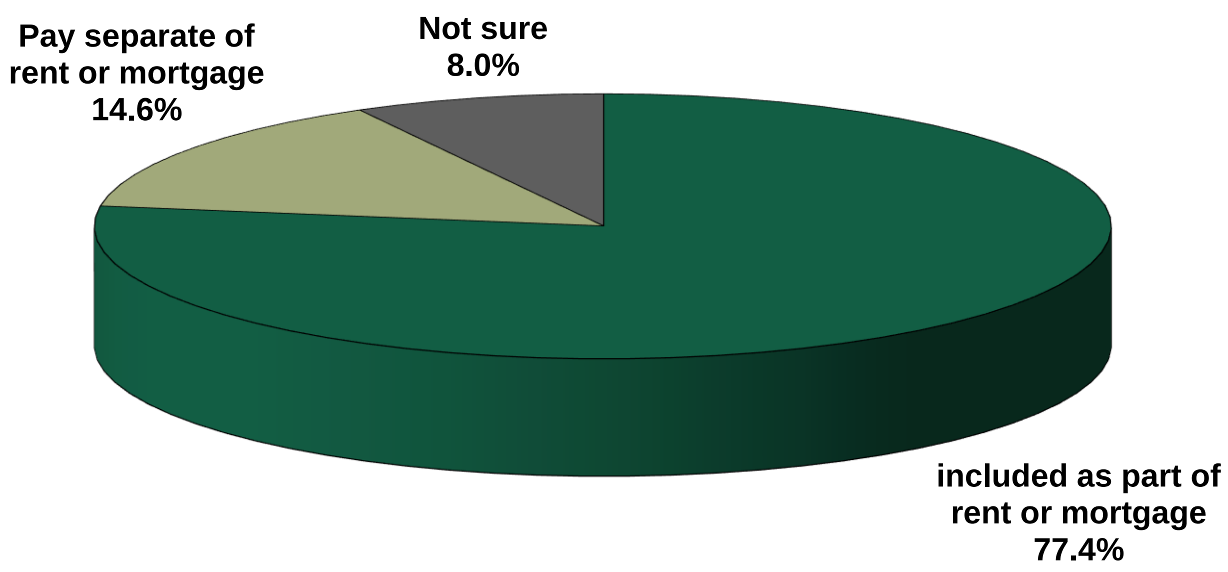
Residents who answered in the affirmative to having access to off-street parking 'at their home' or 'at a location that is not their home' in Q31 were next asked how they pay for their off-street parking. Slightly more than three-quarters (77%) of respondents indicating paying for their off-street parking access as 'part of their rent or mortgage', where more than one in ten respondents (15%) indicated that they pay for off-street parking 'separate of their rent or mortgage'.



Q33. Amount Paid for Off-Street Parking (n=178)

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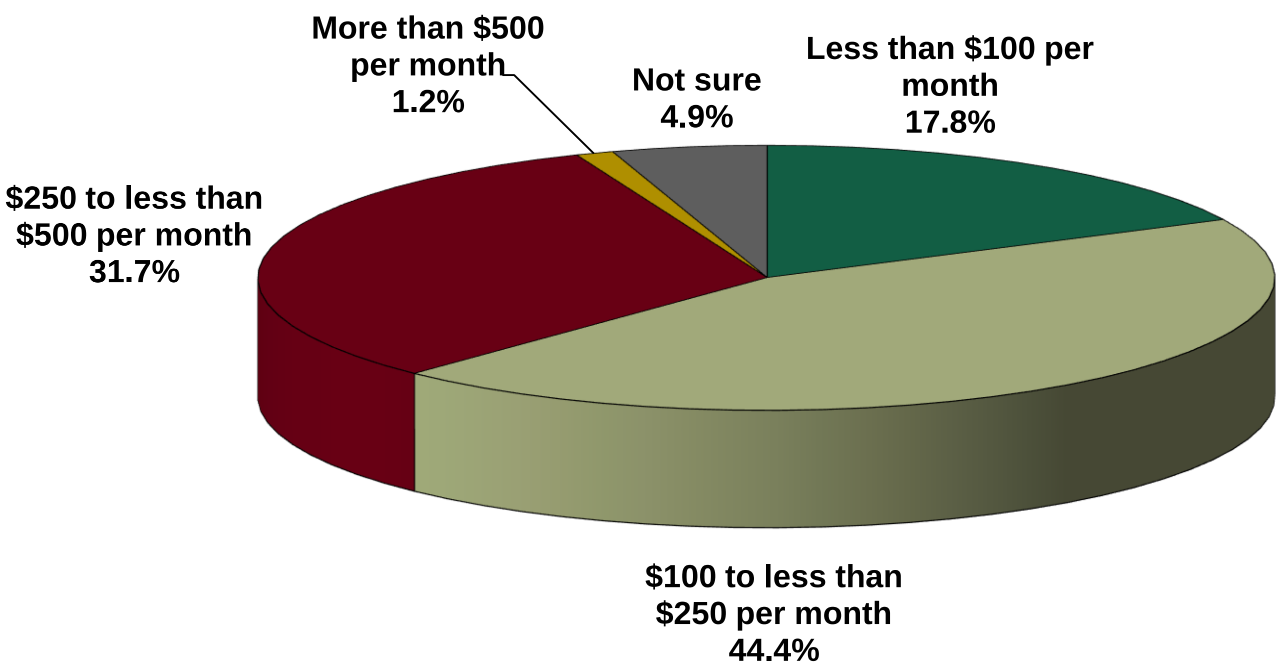
Respondents who indicating paying for off-street parking separate from their rent or mortgage in Q32 were asked a follow-up question regarding how much they pay per month for access to their off-street parking. Slightly less than two in ten (18%) of respondents indicated paying less than $100 per month for off-street parking, where slightly more than six in ten (62%) of residents indicated paying $250 a month or less for off-street parking.



Q34. Frequency of Using Off-Street Parking (n=1,216)

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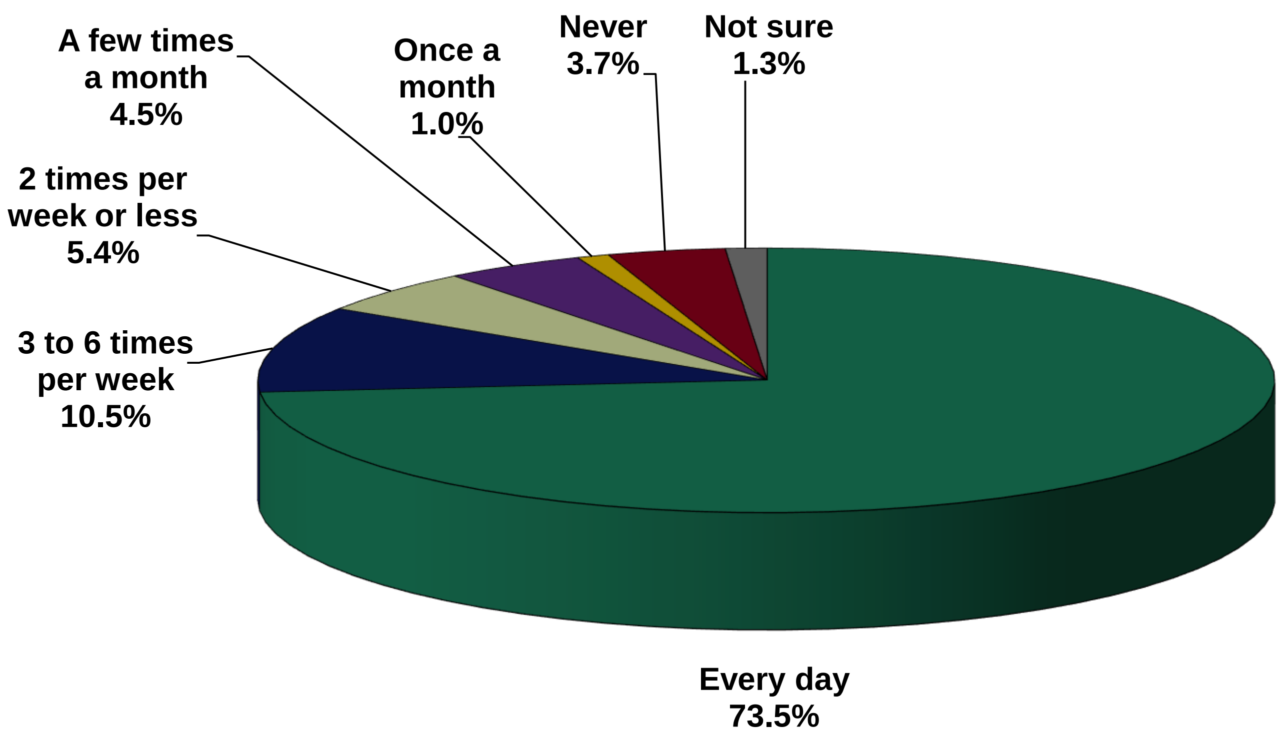
Residents who answered in the affirmative to having access to *off-street* parking 'at their home' or 'at a location that is not their home' in Q31 were also asked how often the use their access to off-street parking. Almost three-quarters of respondents indicated using their off-street parking access 'everyday' and more than eight in ten (84%) of respondents indicated using their access to off-street parking at least three times per week.



Q35. Ability to Access On-Street Parking Near Home (n=2,349)

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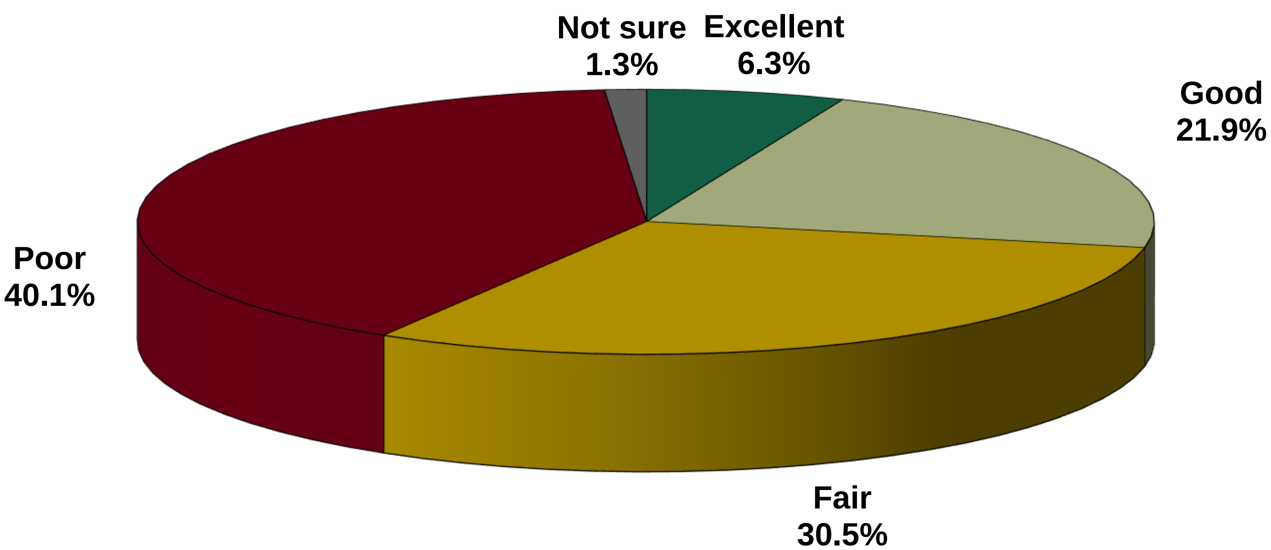
As the only question relating to on-street parking in this section, Q35 asked all survey respondents to rate the ability to access on-street parking near their home. Almost six in ten (59%) of respondents rated the ability to access on-street parking near their home as either 'excellent', 'good', or 'fair', where four in ten (40%) of respondents incited that the ability to access on-street parking near their home as 'poor'.



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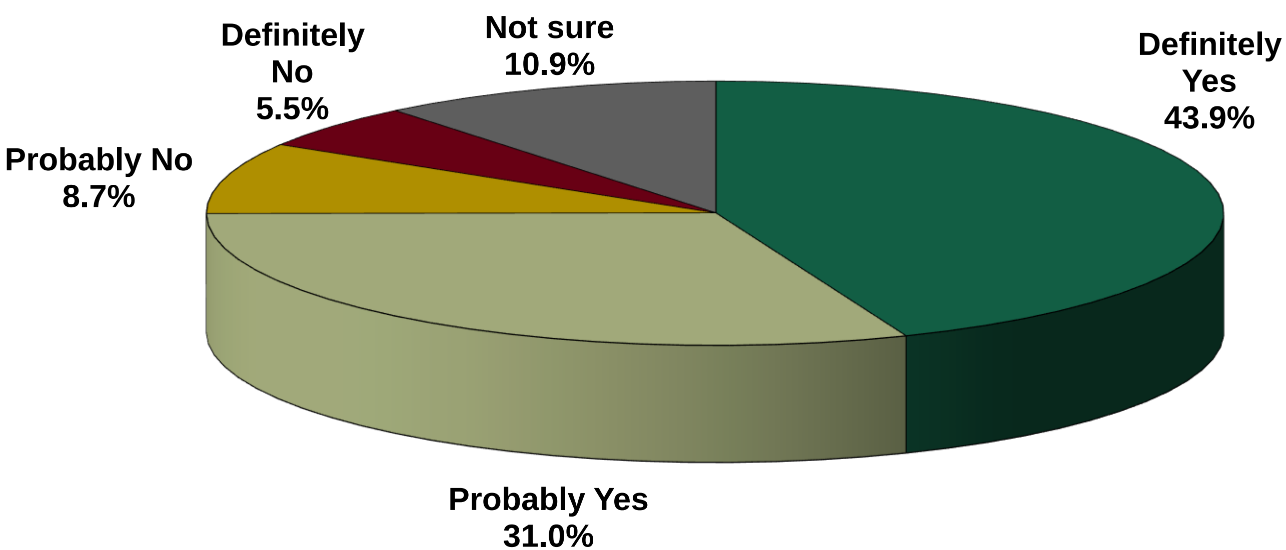
Potential Policy Change Questions

Q36. Support for Reduction in Number of Permits per Household (n=840)

The two final substantive questions in the survey asked about potential future policy changes to the pricing and availability of RPP's under the RPP program, and were only asked of respondents who indicated in Q3 that 'yes' their home is currently located in a designated RPP program area. Q36 asked residents who currently live in a designated RPP program area if they would be in favor of a reduction in the number of RPP allowed for a given household. Three-quarters (75%) of respondents would be in favor of a reduction in the number of RPP's per household (definitely yes/probably yes), where only slightly more than 1 in 10 (14%) of respondents would not be in favor of a reduction in the number of RPP's per household.



Q37. Support for Increasing Annual Permit Price (n=840)

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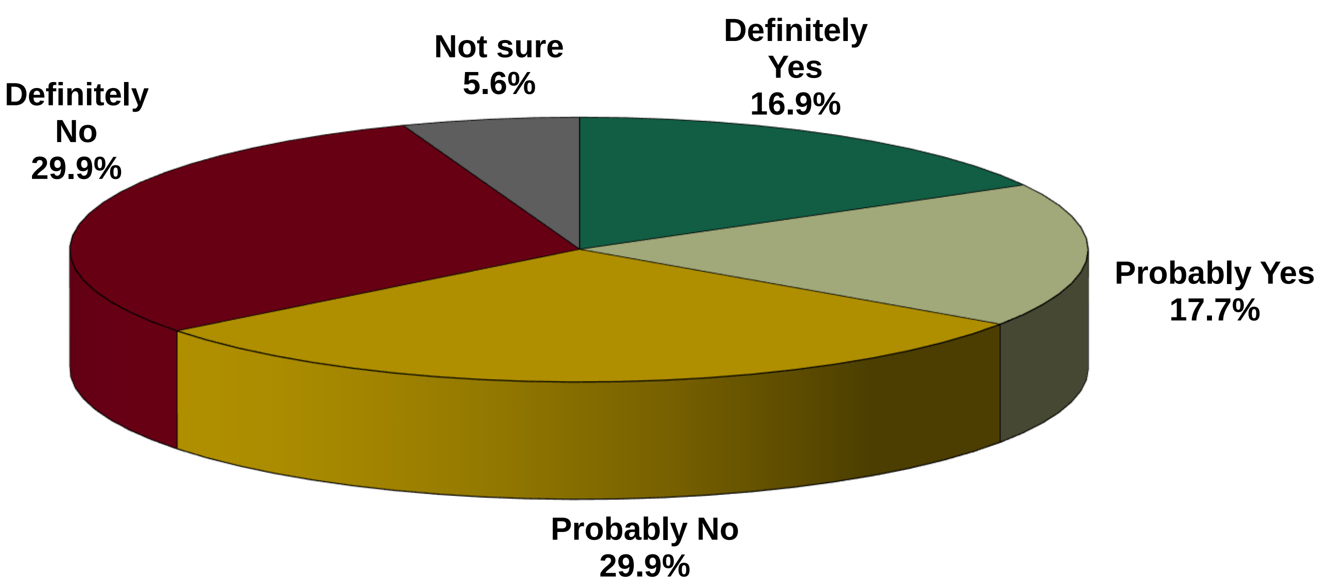
Q37 next asked residents who currently live in a designated RPP program area if they would be in favor of increasing the permit price for an annual RPP under the RPP program, however, we did not test any specific dollar amount or percentage price increase. Only slightly more than one-third (35%) of respondents indicated that they would support a price increase for an annual RPP (definitely yes/probably yes) where six in ten (60%) respondents indicated that they would not support a price increase (definitely no/probably no). Even accounting for a lack of information regarding the amount of a potential future price increase, respondents clearly favored a cap on the number of annual RPP's per household (75% support) in comparison to an increase in price (35% support).



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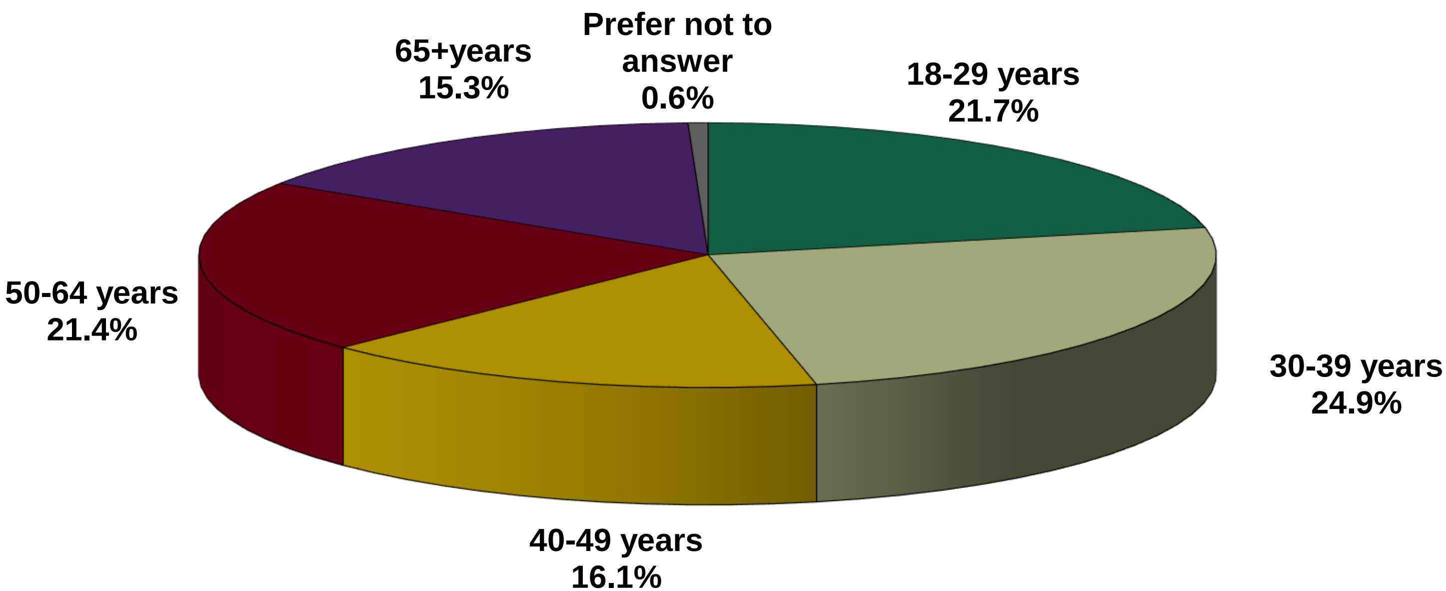
Additional Demographics

Q38. What is your age (n=2,349)



Q39. What ethnic group do you consider yourself a part of or closest to? (n=2,349)

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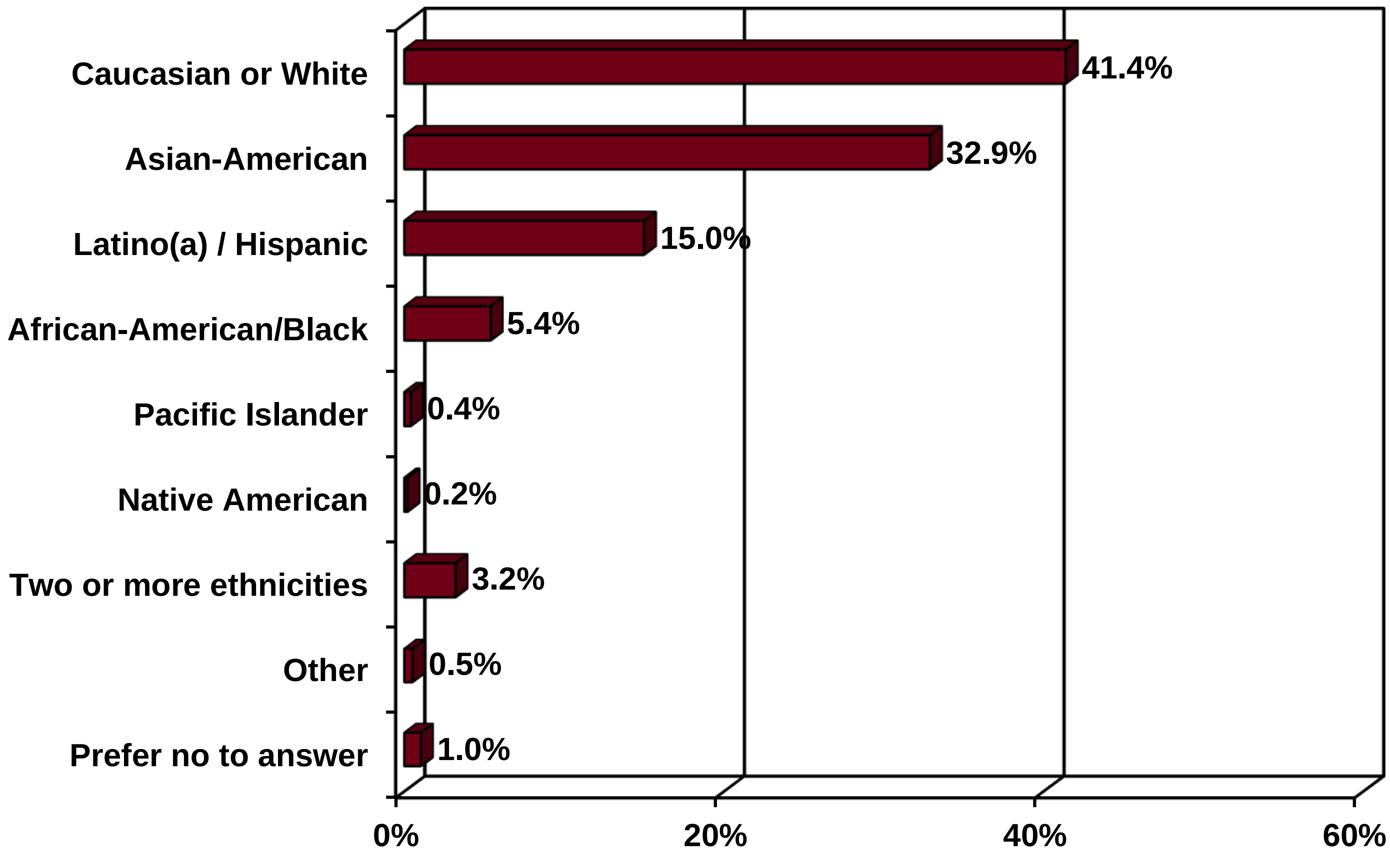
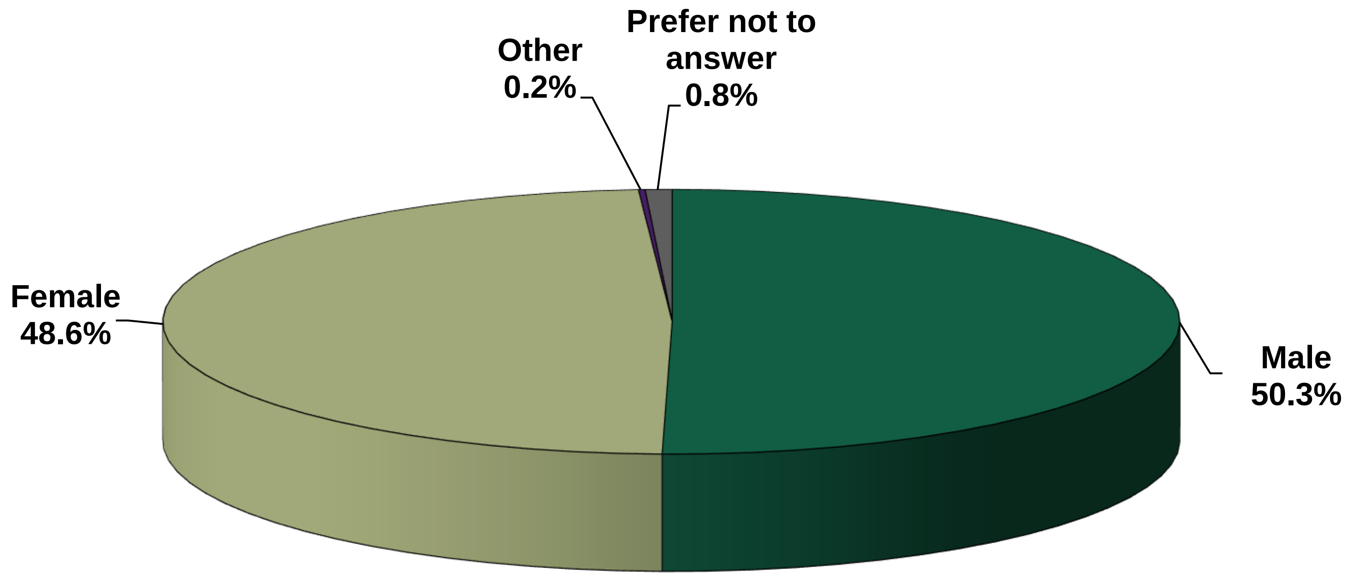
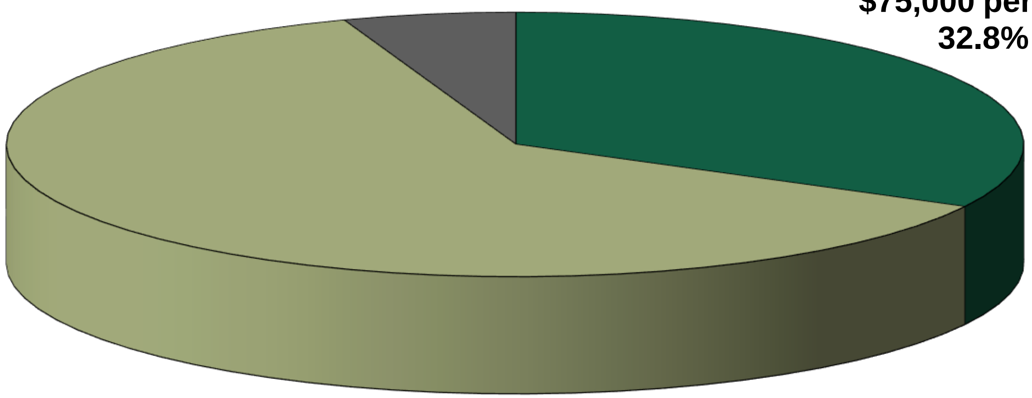


Q40. What is your gender? (n=2,349)



Q41. Please indicate if your household income in less than $75,000 per year or $75,000 per year or more (n=2,349)



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