

PRESIDIO EMPLOYEE + RESIDENT TRANSPORTATION SURVEY RESULTS

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SURVEY RESULTS

INTRODUCTION

This report summarizes the findings from transportation surveys distributed to Presidio-based employees and residents. The survey was distributed to gather information pertaining to daily travel behavior to and from the Presidio. The electronic survey was distributed through multiple email distribution lists. Each survey respondent spent an average of 5-6 minute completing the survey.

Methodology: The employee commute survey was distributed on April 23, 2018 and remained open until April 30, 2018. Employees were asked to answer questions regarding their commute during the previous week.

Responses: Between the two surveys, there were 1,537 responses. There are an estimated 4,000 Presidio-employees and according to data from 2018, there are 3,133 Presidio residents. Of these residents, 657 (21 percent) of them are children under 18. Each survey had a response rate of 22%. There are 293 Presidio residents that also work in the Presidio. This level of response is sufficient for generating results at a 99% confidence level with a confidence interval of +/- 3%.

	Survey Responses	Estimated Adult Population	Survey Participation
<i>Employees</i>	886	4,000	22%
<i>Residents</i>	651	3,133	26%
<i>TOTAL</i>	1,537	6,479	23.7%

RESULTS

1. Commute Distance

Presidio-based employees were asked to provide their home zip code and Presidio residents were asked to provide their work (or school) zip code. Some patterns emerged: over half of Presidio-based employees live in San Francisco and 41 percent of residents work in Downtown San Francisco.

Figure 1.1: Home Zip Codes of Presidio-based Employees

San Francisco County	51%
Alameda & Contra Costa Counties	20%
Marin County	13%
San Mateo & Santa Clara Counties	7%
Presidio Residents	6%
Sonoma, Solano & Napa Counties	3%

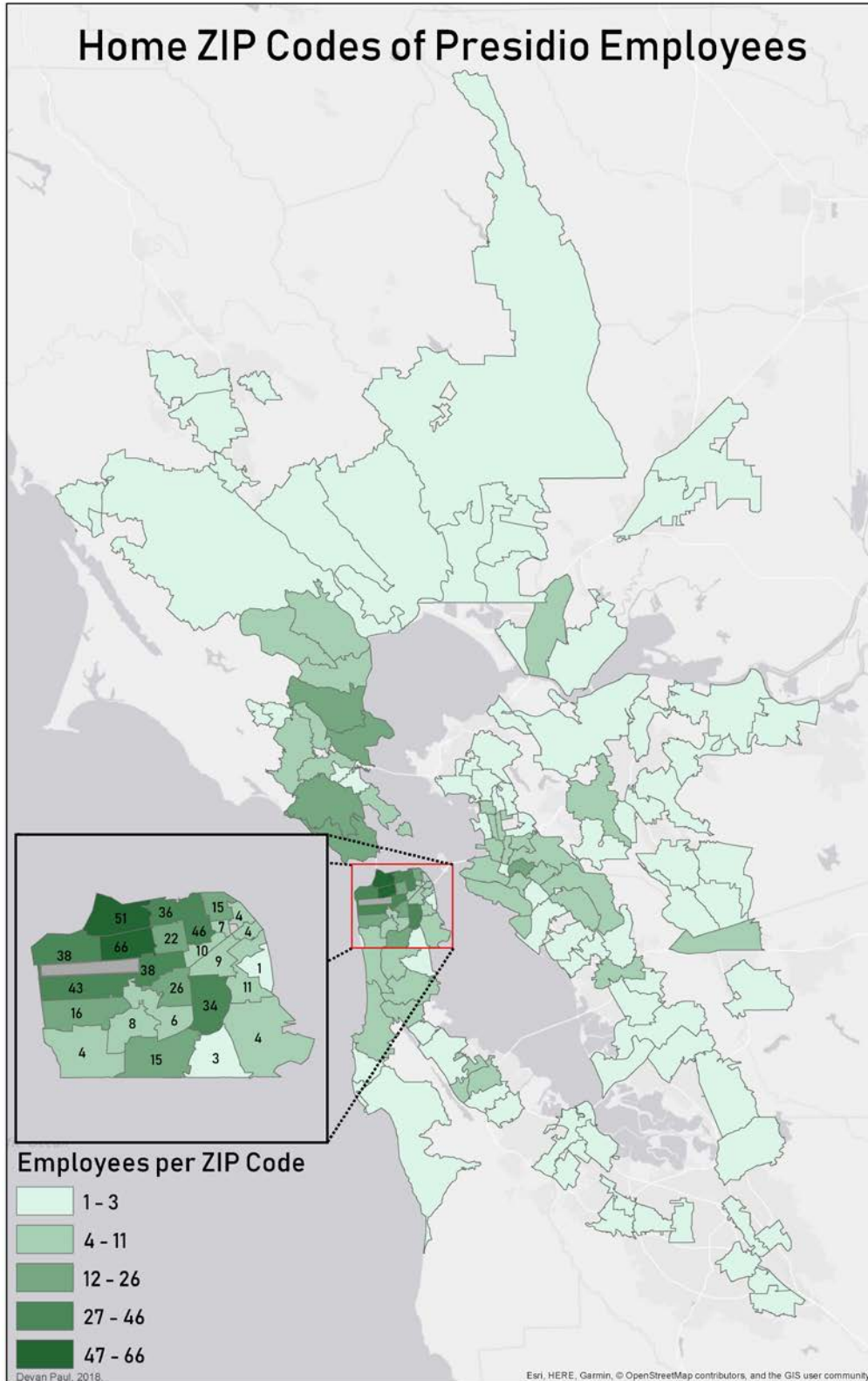
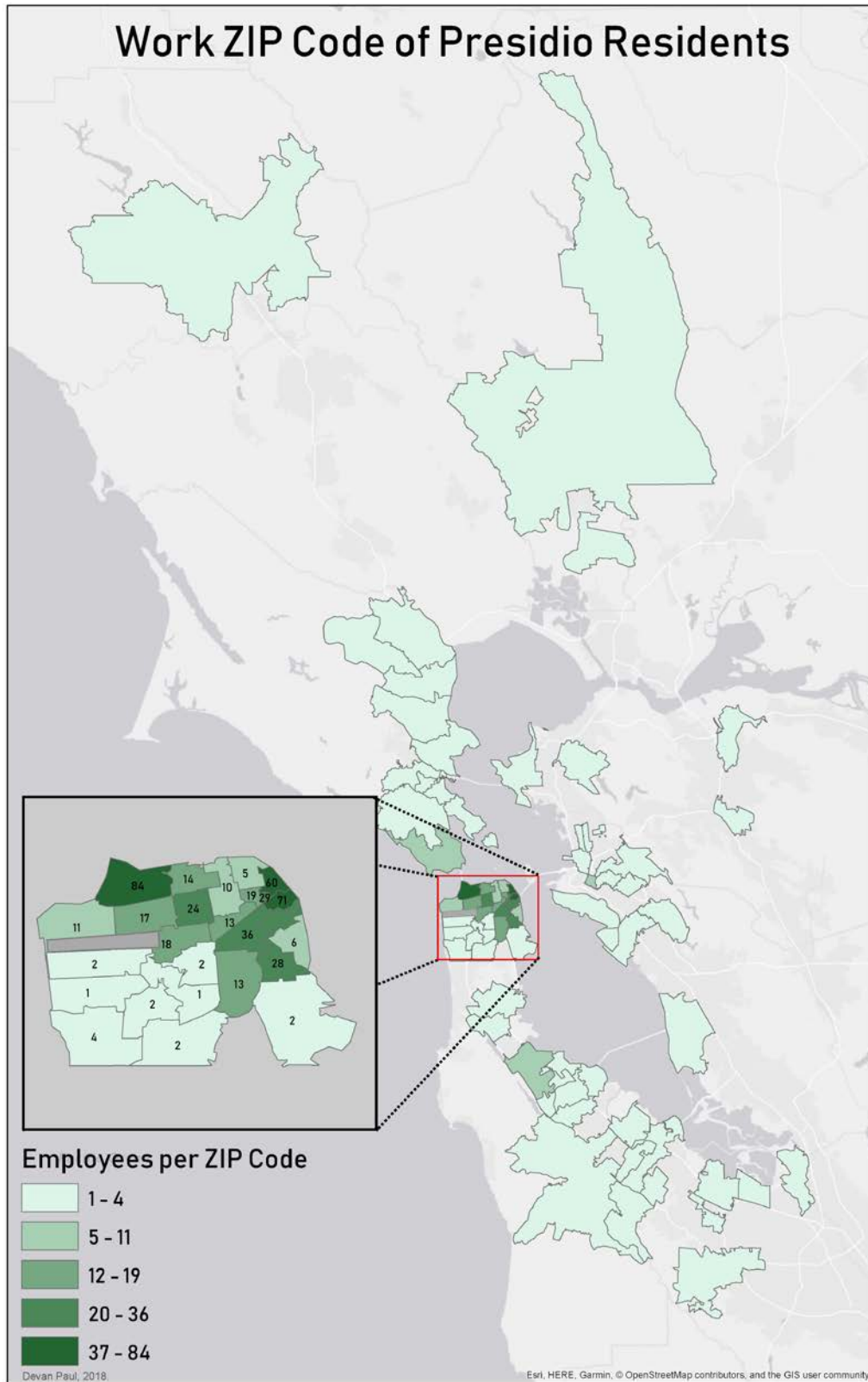


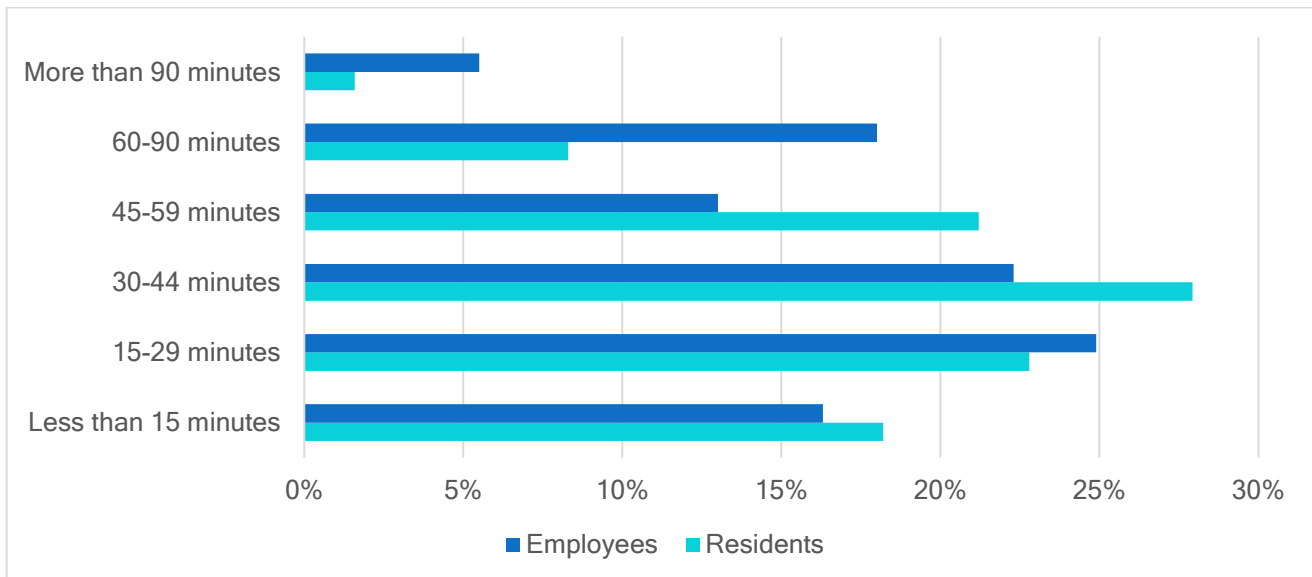
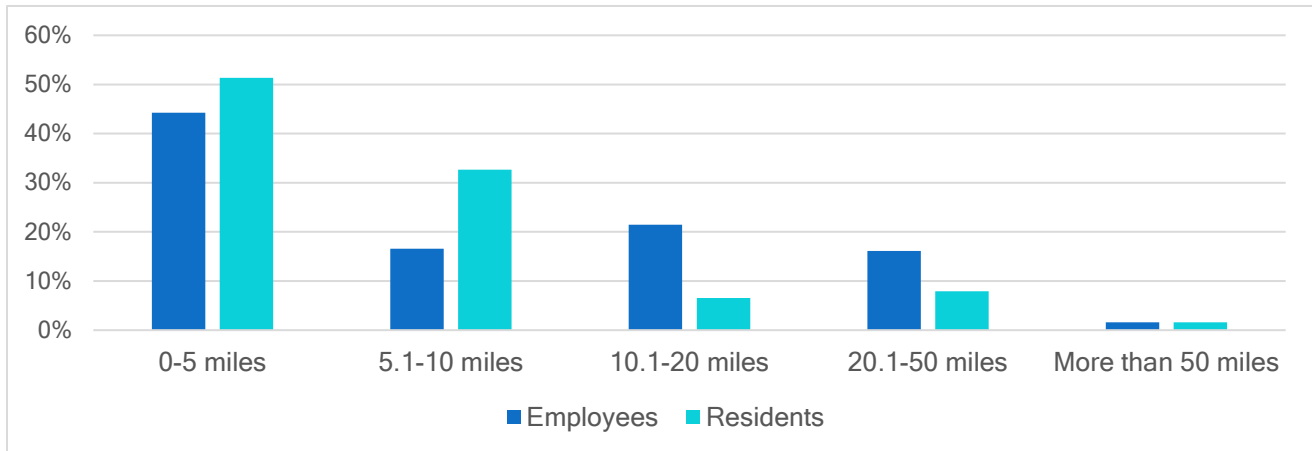
Figure 1.2: Work Zip Codes of Presidio Residents

Downtown San Francisco	41%
Other Neighborhoods of San Francisco	29%
Presidio	15%
San Mateo & Santa Clara Counties	7%
Marin County	4%
Alameda & Contra Costa Counties	4%
Sonoma & Napa Counties	<1%



Nearly half of Presidio commuters¹ travel five miles or less to get to work. Only 14 percent of commuters travel more than 20 miles to work. Commute duration greatly varies but 49 percent of commuters spend 15 to 44 minutes getting to work and 18 percent of commuters spend more than 60 minutes getting to work.

Figures 1.3 and 1.4: Commute Distance and Time



2. Mode Split

Mode split refers to the percentage of trips using a particular type of transportation. As defined in the Presidio Trust Management Plan, the Trust set a long term goal of reducing automobile trips and increasing auto occupancy such that only 50 percent of all external trips are completed by auto.

¹ Presidio commuters in this report is a reference to both populations surveyed: Presidio residents and Presidio employees

Figure 2.1: Presidio-Based Employees Primary Mode² of Transportation to Work

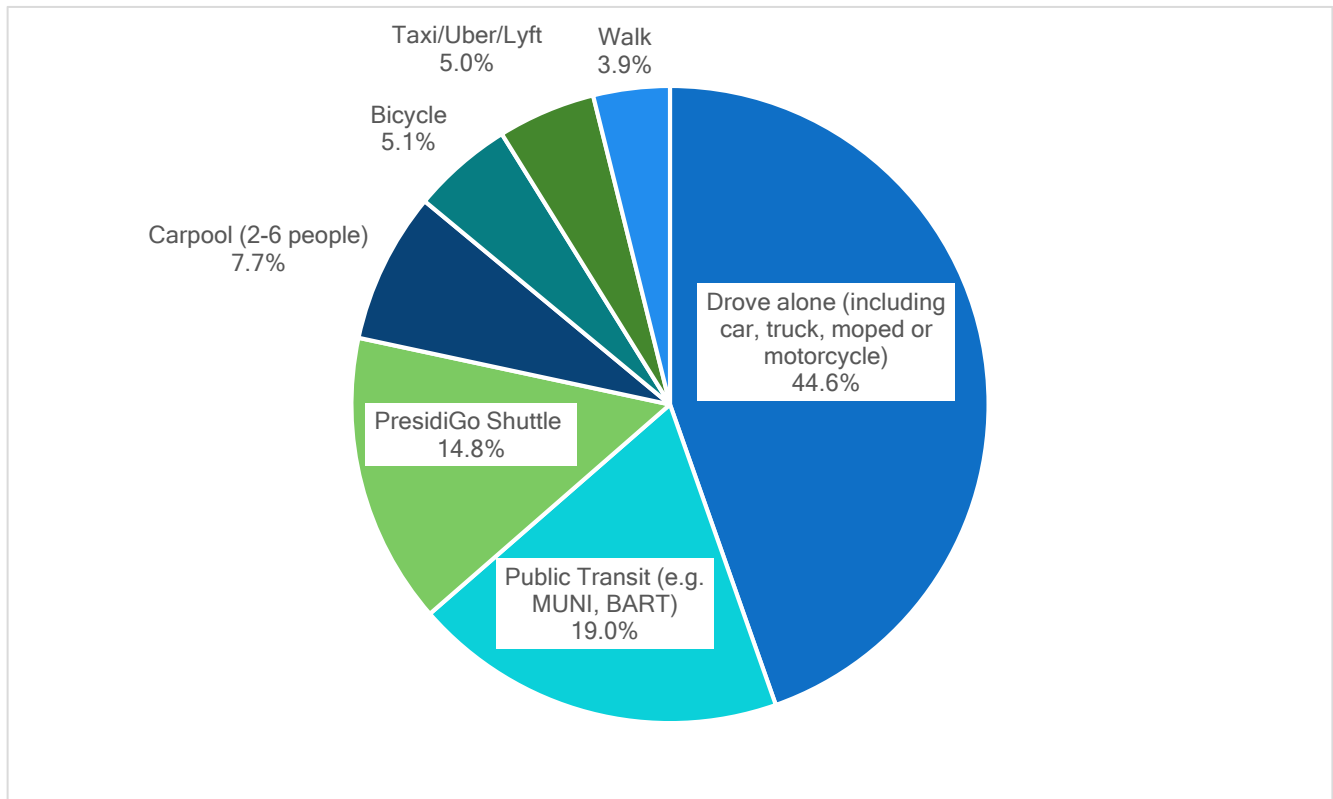
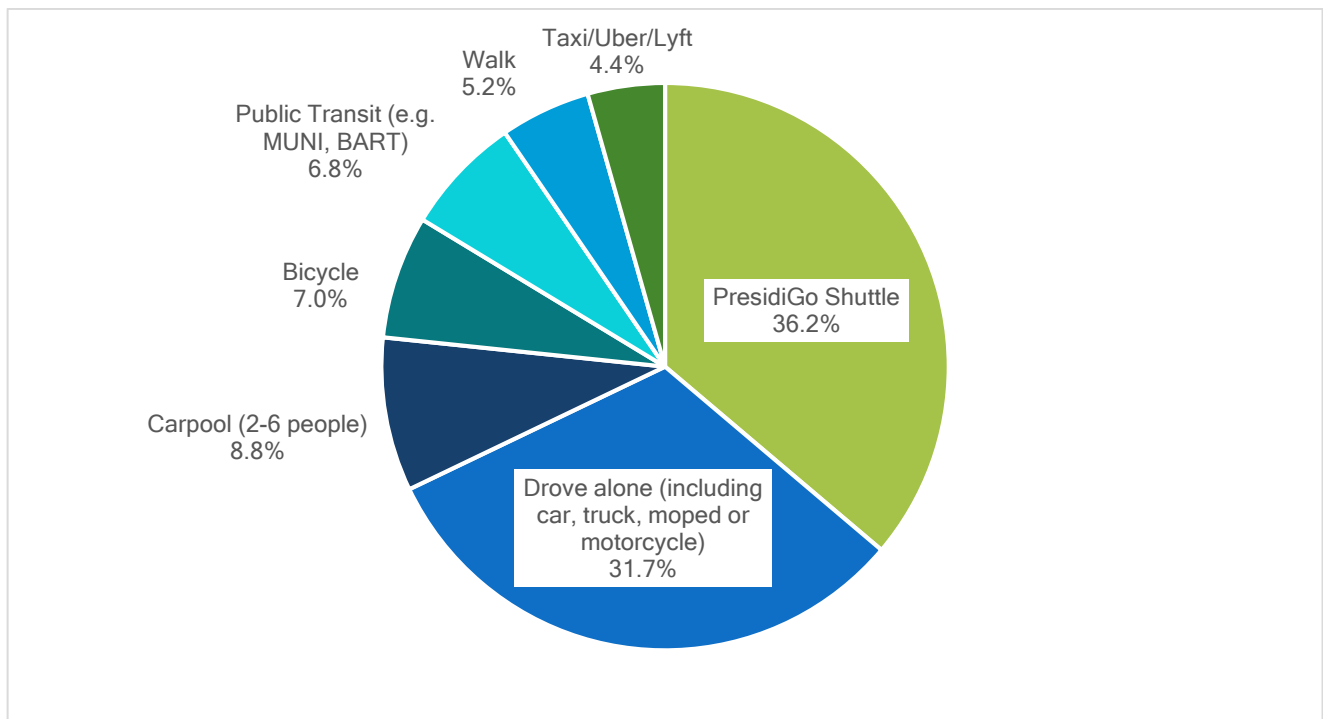


Figure 2.2: Presidio Residents Primary Mode² of Transportation to Work or School



² A primary mode is categorized as the mode of transportation the respondent used for the greatest length of their journey. For instance, a commuter may drive their car one mile to a BART station and ride the BART for six miles. In this case, BART is their primary mode of transportation.

Presidio commuters made 52 percent of their trips to work by auto (combining drove alone, carpool, and taxi trips). For Presidio residents, 32 percent of commute trips were drive alone trips compared to 36 percent³ of all San Francisco residents. Presidio-based employees are more likely to drive alone (45 percent) than residents and how they commute is largely determined by what county they are commuting from (Figure 2.3 below). The drive alone rate is significantly lower than the Bay Area as a whole: 66 percent of Bay Area residents drive to work alone³.

Public transportation and PresidiGo are the most popular commute alternatives. For Presidio residents, the PresidiGo Shuttle is the most popular way to commute to work. When both populations are combined, 37 percent of commutes are completed by public transportation or PresidiGo, the same rate as San Francisco residents (37 percent³). At 43 percent, Presidio residents are more likely to use transit or PresidiGo than San Francisco residents (37 percent³).

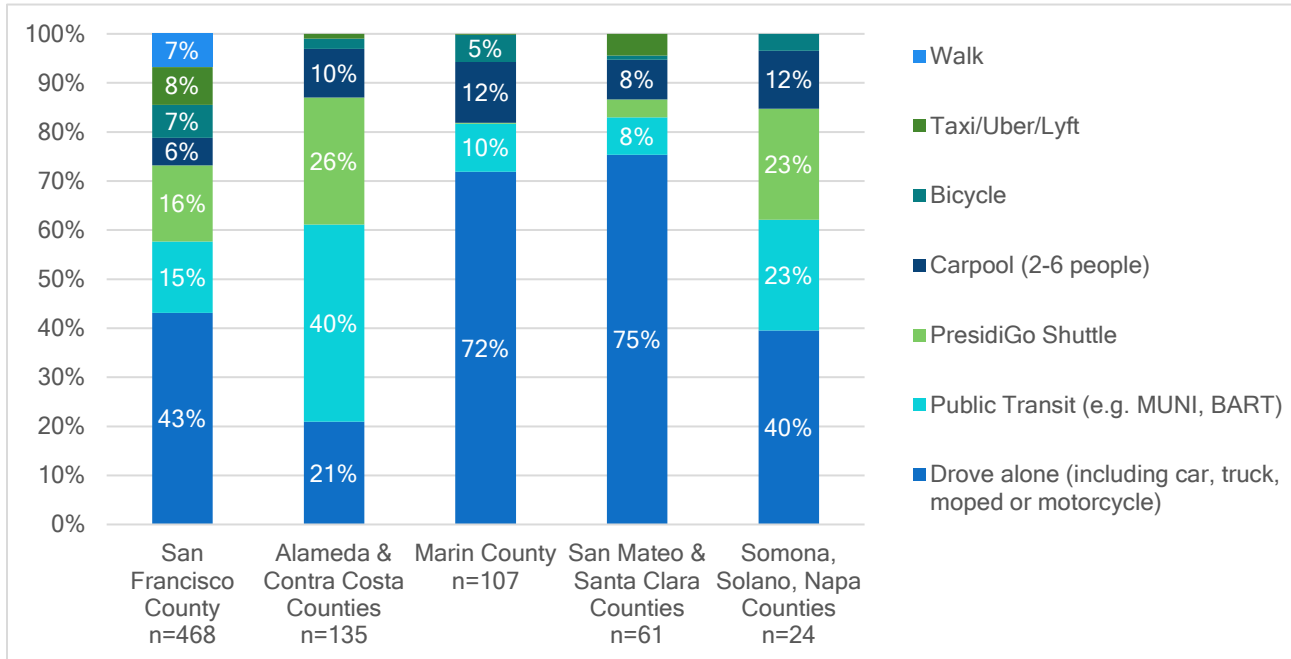
Presidio commuters are more likely to bike than San Francisco residents (5 percent vs 4 percent³). However, walking to work is much more popular for San Francisco residents, just 4 percent of Presidio commuters walk compared to 12 percent of San Francisco residents³. Over 4 percent of commute trips were made by Taxi/Uber/Lyft but the City does not have data available for comparison. Although vanpool was a separate category in the survey, less than one percent of trips were made by vanpool and were excluded from the charts.

Twenty percent of Presidio commuters use more than one mode of transportation to get to work. Of those commuters, 69 percent of them use a combination of PresidiGo and Public Transportation. The remaining commuters that use more than one mode of transportation account for three percent of survey respondents. There is an equal split between people that drive alone, carpool and bike as their second mode of transportation.

Six percent of commuters answered “Did not commute/Other mode (e.g. vacation, telecommute)”. This response was most common on Friday; 10 percent of Presidio commuters did not commute on Friday.

³ 2016 American Community Survey 1-Year Estimates

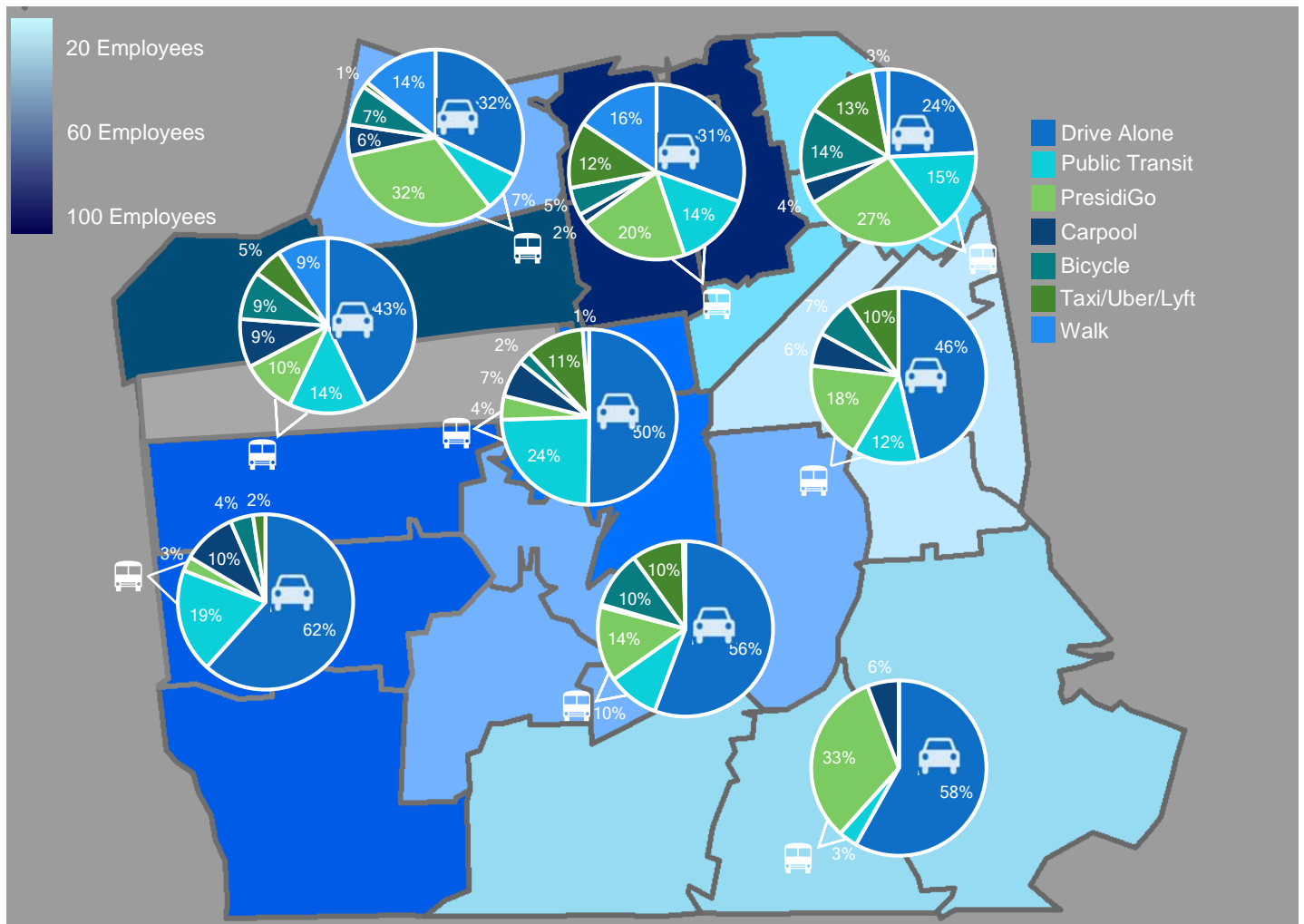
Figure 2.3: Presidio Employee Primary Mode Split by Home County



Presidio-based employees' commutes vary greatly by what county they reside in. Commuters that live in San Francisco have the most transportation options and they are more likely to ride a bike, walk, or take a taxi to work. Alameda and Contra Costa residents are significantly more likely to take public transit and PresidiGo: 66 percent commuted by transit and just 21 percent drove alone. This may be due to traffic on the Bay Bridge: using BART and PresidiGo is, in many cases, quicker than driving to Alameda and Contra Costa counties. Marin County does not have public transportation with its own right-of-way and San Mateo and Santa Clara counties have much fewer rapid transit stations compared to the East Bay. Commuters from Sonoma, Solano, and Napa counties may be avoiding bridge tolls and heavy traffic congestion outside of San Francisco by using public transportation.

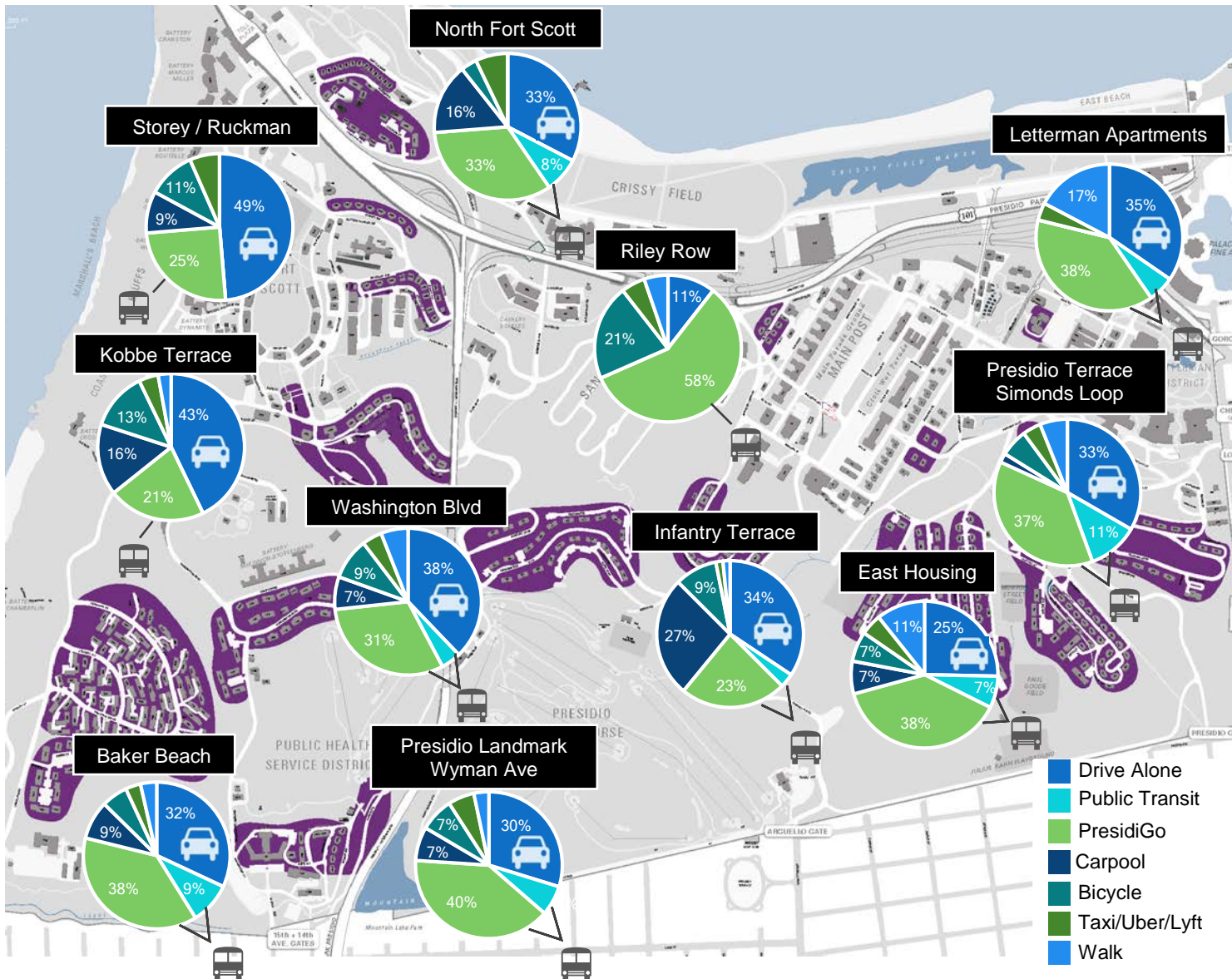
The drive-alone rate for Presidio commuters from Marin County is very close to that of Marin County as a whole: 72 percent of Marin County commuters coming the Presidio drive alone and 73 percent of Marin County residents³ drive to work alone. Similarly, San Mateo and Santa Clara residents commuting to the Presidio drive alone at the same rate as the county averages (75 percent³). However, the drive alone rate for Presidio commuters from Alameda or Contra Costa is significantly lower when compared to the counties overall: 68 percent³ of Alameda or Contra Costa residents report driving alone to work compared to the just 21 percent of Presidio commuters.

Figure 2.4: Presidio Employee Commutes from San Francisco Neighborhoods



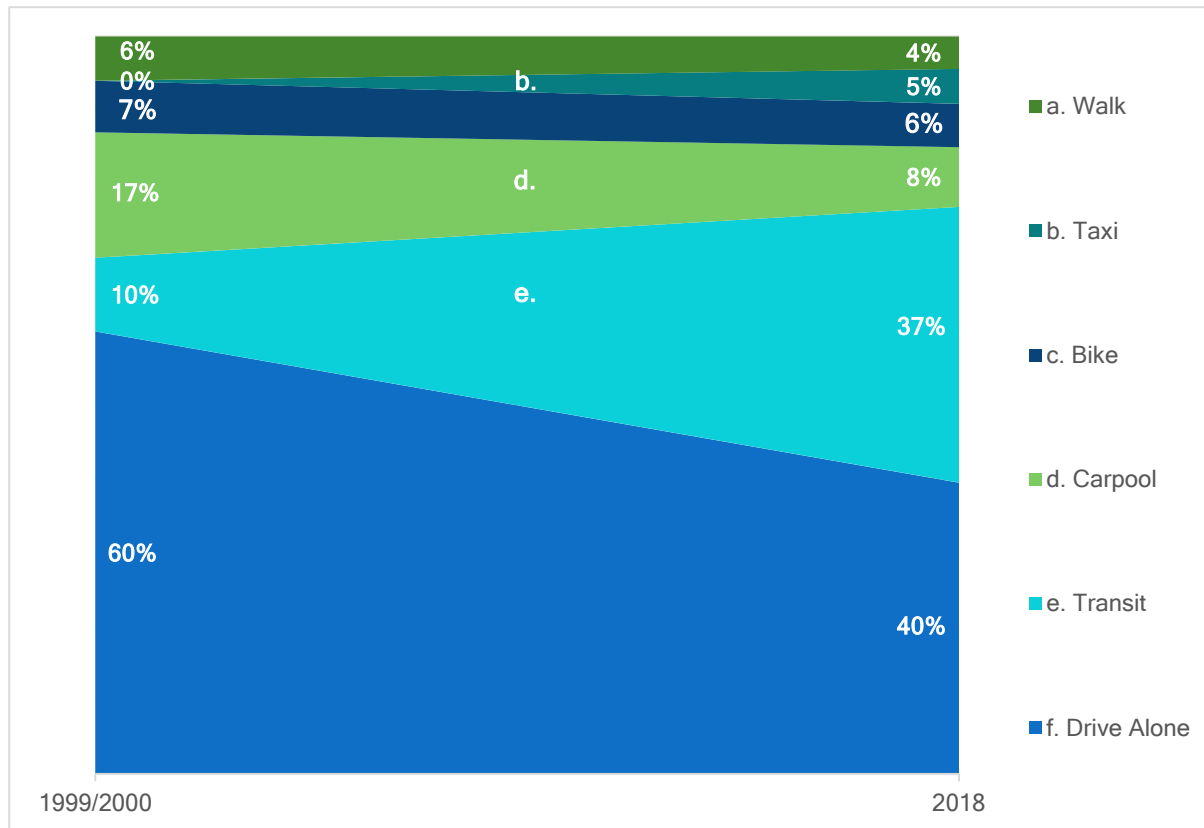
The ways that San Francisco residents that work in the Presidio commute vary greatly based on which neighborhood they live in. The two neighborhoods that are closest to the Presidio (the Richmond and the Marina/Russian Hill) have the highest number of Presidio-based employees. Commuters in these neighborhoods are more likely to commute to work using active transportation like walking or biking. The relatively few people that live in Downtown San Francisco (39 respondents) are the least likely to drive to work and the most likely to take PresidiGo or public transit. Those that live in the Sunset district are the most likely to drive alone to work and the least likely to take transit or PresidiGo. There are no direct transportation options from the Sunset to the Presidio's Main Post.

Figure 2.5: Presidio Residents Commutes by Neighborhood



Transportation modes used by Presidio residents to travel to work also vary by the Presidio's residential neighborhood. The neighborhoods that have the highest rates of driving alone are the neighborhoods in Fort Scott (49 percent) and Kobbe Avenue (43 percent). These neighborhoods also have the longest commutes on PresidiGo: takes almost 25 minutes to just to reach the Presidio Transit Center and transfer to the Downtown Route using the Crissy Field Route in these neighborhoods. The neighborhood closest to the Presidio Transit Center, Riley Row, is most likely to use PresidiGo to commute to work (58 percent). Unexpectedly, the neighborhood with the second highest PresidiGo shuttle usage is the Presidio Landmark, with 40 percent of their residents using the shuttle. The Presidio Landmark, managed by Forest City, has higher residential parking fees and lower car ownership than the rest of the Presidio.

Figure 2.6: Past and Present Combined Mode Split



The last Presidio-based employee transportation survey was administered in 1999 and the last residential transportation survey took place in 2000. Figure 2.5 combines the populations of residents and employees for both time periods. Back in 1999/2000, the travel behaviors of Presidio residents and employees were very similar to one another: 59 percent of employees and 61 percent of residents drove alone. Transit use and carpooling rates were also comparable. Since 2000, transit ridership (which includes PresidiGo in this chart) has increased substantially and drive alone rates have decreased.

3. Taxi/Uber/Lyft

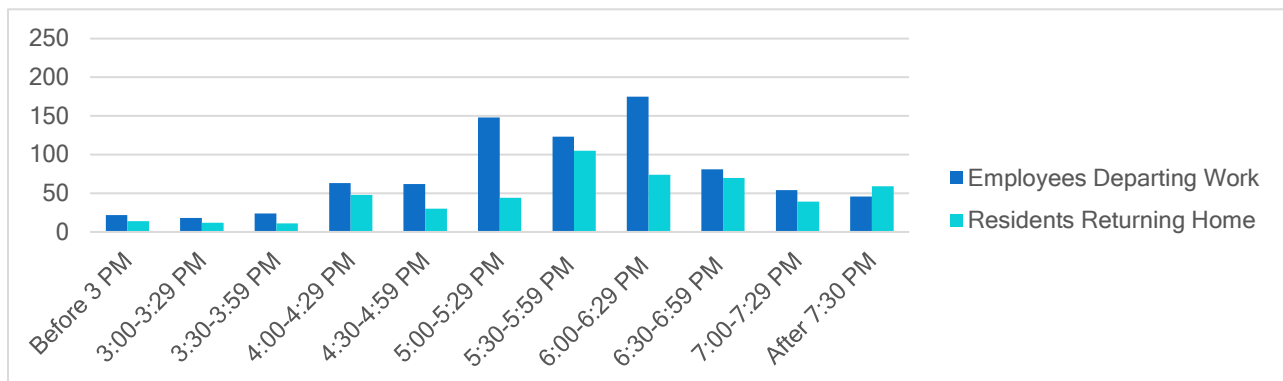
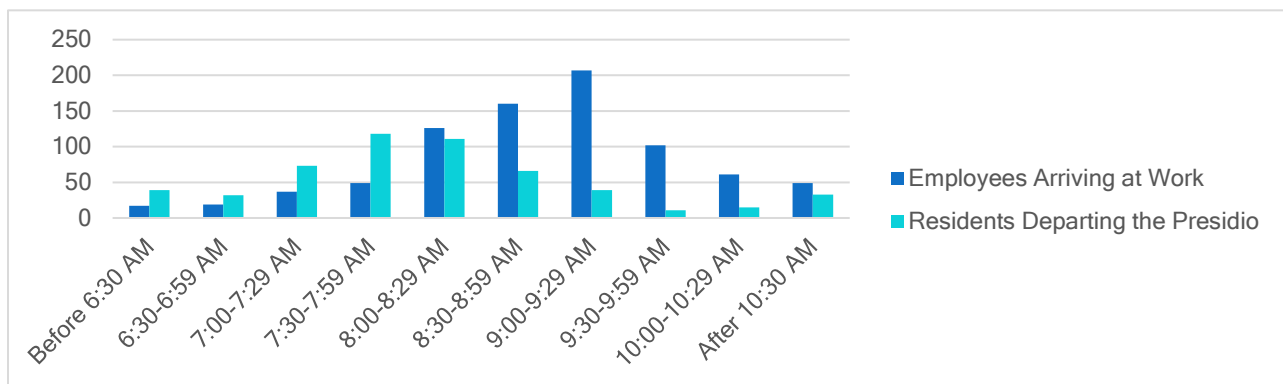
Transportation network companies like Uber and Lyft are becoming an increasingly popular way to get around. The Taxi/Uber/Lyft category accounted for almost 5 percent of commutes to work. Respondents were also asked how many taxis (including services like Uber and Lyft) they take to/from the Presidio each month. For residents, the number of taxi trips includes all types of trips, not just work trips. 88 percent of residents use taxis on a monthly basis and residents take, on average, six taxi rides per month. 58 percent of employees use taxis for transportation in the Presidio and the average employee takes three taxi rides per month. Detailed results about taxi rides are provided in Figure 3.1.

Figure 3.1: Number of Monthly Taxi Rides

Number of Taxi Rides	Employees n = 818	Residents n=558	Total n=1376
0	42%	12%	30%
1	13%	10%	12%
2	11%	9%	10%
3 to 5	18%	27%	22%
6 to 10	9%	26%	16%
11 to 20	5%	13%	8%
21 to 30	2%	3%	2%

4. Schedule

The majority of Presidio commuters have a typical 9 to 5 schedule. The peak hours are 8:00 to 9:00am and 5:30 to 6:30pm. In the morning, 54 percent of commuters are traveling in the Presidio between the hours of 8:00am and 9:30am. In the evening, 51 percent of commuters travel between 5:00pm and 6:30pm. The mode of transportation does not impact the time of day commuters travel (transit riders and car drivers arrive and depart work around the same time). The peak arrival times for employees matches up with PresidiGo ridership: the busiest PresidiGo trips arrive to the Presidio around 9am. However, the evening peak on PresidiGo occurs slightly earlier than the survey results: the busiest trips leaving the Presidio in the evening are 5:00 PM and 5:15 PM. This may mean more visitors are taking PresidiGo at these times.

Figures 4.1 & 4.2: Arrival and Departure Times

Eighty-eight percent of Presidio-based employees work a five day work week and eighty percent of residents are employed full-time. Telecommuting is used by 44 percent of employees but only 19 percent of employees telecommute once a week or more. 32 percent of employees use telecommuting twice a month or less.

5. Alternatives

Respondents that drive to work alone were asked what would encourage them to drive less often. The most common for both populations was better public transportation or PresidiGo service: 42 percent of Presidio residents reported improved PresidiGo service would encourage them to leave their car at home. Many residents (26 percent) reported that nothing could encourage them to use an alternative to driving. About 15 percent of commuters answered “Other”. The most common answer was that a vehicle was needed for making multiple stops (like dropping kids at school) or for carrying supplies.

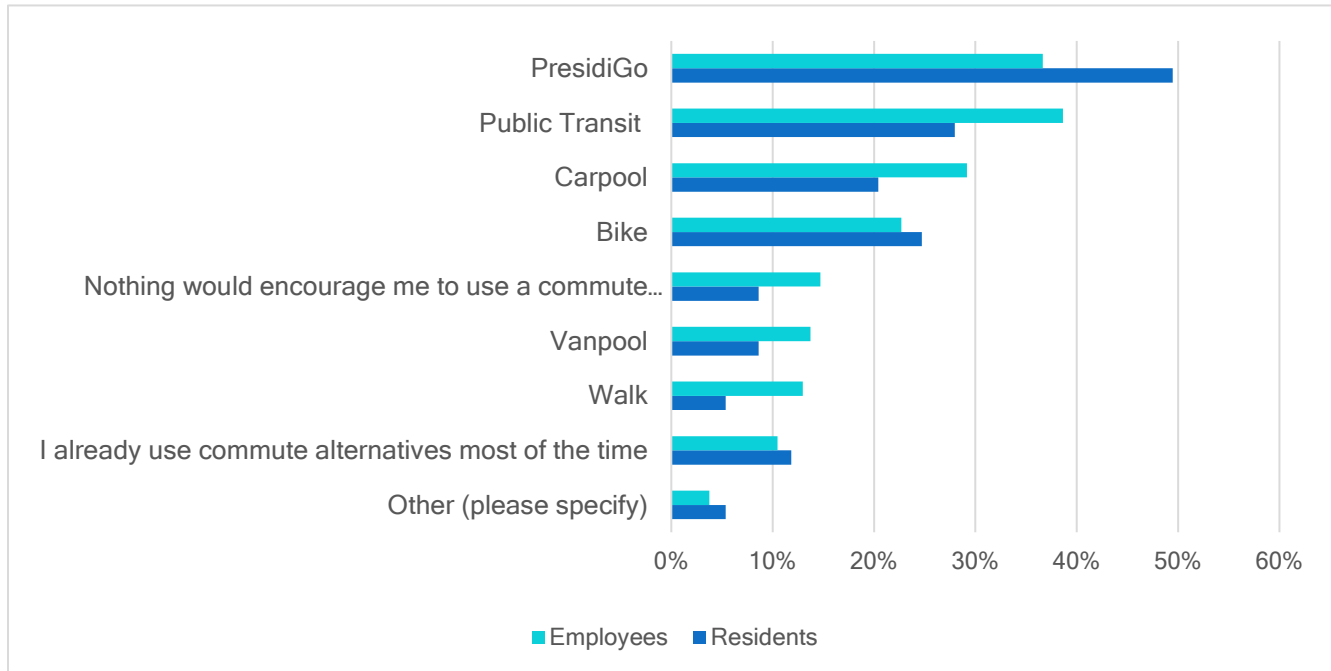
Figure 5.1: Transportation Demand Management Improvements

Drivers were asked to pick up to three answers (totals add to more than 100%).

	Employees	Residents
<i>Better public transit service in the Presidio</i>	30%	30%
<i>Financial subsidies/incentives for using alternative modes</i>	27%	n/a
<i>Better public transit service near my home (employees) or work (residents)</i>	26%	13%
<i>Nothing would encourage me to use a commute alternative</i>	18%	26%
<i>Better PresidiGo shuttle service</i>	17%	42%
<i>A more flexible work schedule</i>	12%	n/a
<i>Shared electric scooters available for personal use</i>	8%	13%
<i>Bicycle lockers/showers at work</i>	8%	n/a
<i>I already use commute alternatives most of the time</i>	7%	12%
<i>Employer/fleet vehicle available for work use (i.e. to drive to meetings)</i>	7%	n/a
<i>Assistance finding a carpool/vanpool</i>	6%	5%
<i>Better bicycle/pedestrian access</i>	6%	9%
<i>Better on-site services (retail, banking, etc.)</i>	6%	n/a
<i>More information about commute alternatives</i>	5%	5%
<i>Increased availability of car share vehicles for personal use</i>	4%	n/a
<i>Free taxi ride home in a personal emergency</i>	4%	5%
<i>Other</i>	15%	14%

Car drivers (anyone that drove a car to work at least once that week) were also asked what alternatives to driving they would be willing to try. The most popular answer was PresidiGo: 49 percent of residents and 37 percent of employees said they would try using PresidiGo. Public transit, carpooling, and biking were other common answers.

Figure 5.2: Preferred alternatives to driving



CONCLUSIONS

The Presidio Trust is close to achieving its long term goal of increasing the sustainable transportation mode share to above 50 percent for trips to or from the Presidio. When you look at the two populations as a whole, just 52 percent of trips were made by auto (combining drive alone, carpool and taxi trips). Since 2000, the percentage of trips made using sustainable modes has increased. All this increase was from PresidiGo and public transit. Transit ridership rose for both populations and for residents, the PresidiGo shuttle is the most common mode of transportation to work.

Better public transit is the improvement most likely to shift car drivers to more sustainable modes. The people that were most likely to drive alone were employees commuting from Marin or Santa Mateo and Santa Clara counties. The transit options from these areas do not have their own right-of-way so they are subject to car traffic and the riders' commute will be longer than driving. Those commuting from the Sunset district and residents near Fort Scott

and on Kobbe Avenue are also more likely to drive than their neighbors. These populations are dependent on inefficient transit transfers. By providing more first and last mile options like scooter and bike share, these commuters maybe more likely to take transit.



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In partnership with the National Park Service and the Golden Gate National Parks Conservancy, and at no cost to taxpayers, the Presidio Trust brings alive the unique historic, natural, and recreational assets of the Presidio for the inspiration, education, health, and enjoyment of all people.