



David Binder Research

San Francisco Voter Survey Summary Memo on Transportation

Summary

A recently conducted telephone (both cell and landline) survey of voters in San Francisco shows strong support for City leaders to encourage more cycling in San Francisco, expand the Bike Share program to serve the city's neighborhoods, and provide physically separated bike lanes to increase safety and ensure bicycling is comfortable and safe to residents of all ages.¹

Despite operating only a few months, half of voters have a favorable opinion of Bay Area Bike Share, with only 11% unfavorable, with the remaining 39% having no opinion. Further, two-thirds of voters support expanding the bike sharing program to serve San Francisco's neighborhoods.

About three-fourths of voters believe bicycling is good for San Francisco and that bicycling in the City should be comfortable and attractive to people of all ages, from small children to seniors. And voters back up these general viewpoints by strongly supporting specific policies that would expand cycling in San Francisco through such infrastructure improvements as physically separated bike lanes and taking steps so riders feel less threatened by cars.

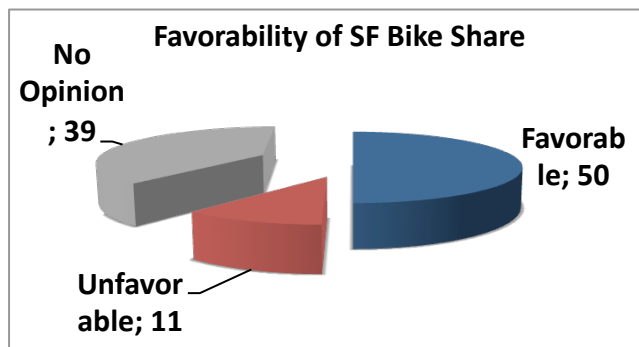
Importantly, not only do voters support policies to expand cycling, there is an urgency to their support – with 60% support for increasing the total number of all trips taken to between 10-15% **in the next five years**. And many voters would like to ride a bike more frequently than they do, including about 3 in 10 of voters who never ride a bike currently. However, concerns over safety (more than half of voters think riding a bike in San Francisco is unsafe) and the lack of protected bike lanes (majorities of voters are likely to ride a bike on protected lanes) result in fewer voters choosing to ride a bike.

David Binder Research surveyed 400 likely San Francisco voters by cell phones and landlines between October 8th and 10th, 2013. The margin of error is ±4.9%. Full question wordings and responses appear in the Appendix.

Importantly, this survey was conducted with voters, which has two notable implications:

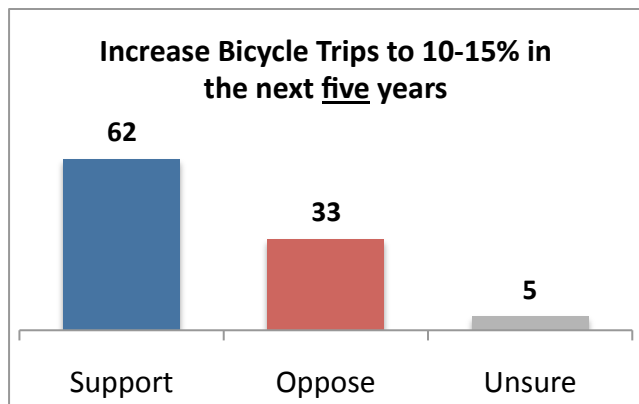
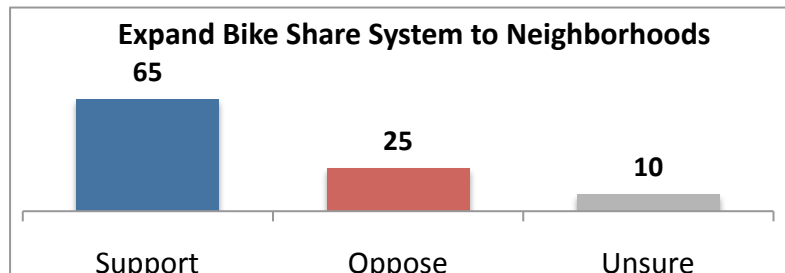
- ✓ First, because the voting pool skews older than the residents overall (28% in the survey were over 65, compared with 14% for the general population), support would be even higher if these questions were asked of all city residents and not voters.
- ✓ Second, even though the respondents in the pool were twice as likely to be over 65 than the typical resident of San Francisco, **majorities of voters** support a range of proposed policy options to improve San Francisco's bicycling infrastructure.

Voters Love Bike Share and Support Expanding Both Bike Share and Cycling Generally



50% of voters are favorable towards Bay Area Bike Share, with only 11% unfavorable. 39% do not have an opinion, which is not surprising given that the program has been in operation for just a few months. What is remarkable is that 50% of voters are favorable towards this new, limited program that only operates downtown currently.

Further, 65% support expanding the bike share program to 3,000 bikes to serve San Francisco's neighborhood, with only one-quarter opposing the expansion and 10% unsure.

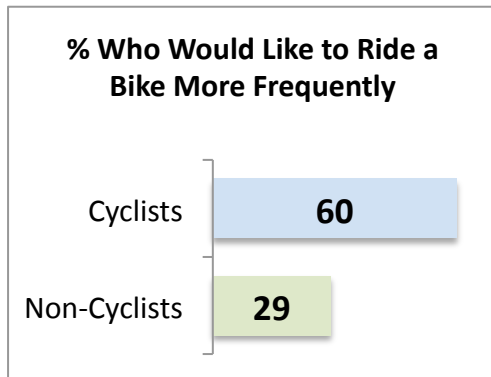


Voters also strongly support the City's goal of increasing the number of bicycle trips to between 10% and 15% of all trips *in the next five years*. There is a sense of urgency from voters in support of city leaders working to make the city an easier place to move around by giving people more transportation options, including bicycling.

Voters also agree strongly with the idea that bicycling is good for San Francisco, should be comfortable for residents of all ages, and that city government should do more to encourage cycling:

- ✓ 76% agree: Bicycling is good for San Francisco.
- ✓ 72% agree: Bicycling in San Francisco should be comfortable and attractive to people of all ages, from small children to seniors.
- ✓ 60% agree: City government should do more to encourage bicycling as a routine form of transportation in San Francisco.

And voters are not just generally supporting the *idea* of bicycle riding, but are already out there riding a bike regularly. 43% of voters are already riding a bike, with 25% of voters in San Francisco riding regularly, meaning a few times a month or more.

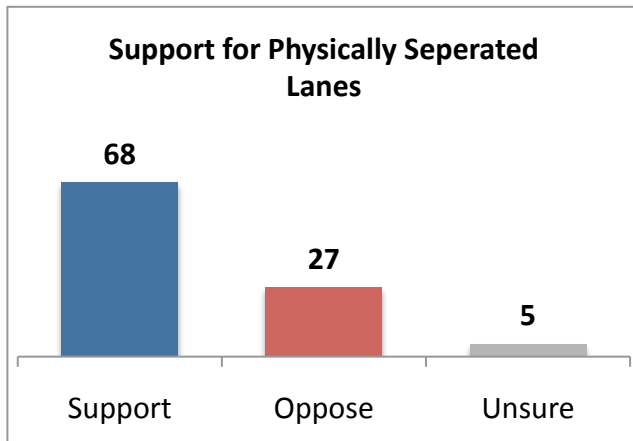


Further, many voters would like to ride a bicycle more frequently than they do now. Three-fifths (60%) of voters who currently ride a bike in San Francisco would like to ride even more frequently than they do now. But perhaps more interesting is that 29% of voters who currently **never** ride a bike would like to ride a bike more frequently.

Many voters would like to ride a bike more in San Francisco, and would do so if they felt less threatened by cars, the streets were smoother, and there were more bike lanes. And voters clearly prefer physically separated bike lanes, enhancing a sense of safety. The top three reasons cited that would cause voters to be more likely to ride a bike are:

- ✓ 46% more likely: Feeling less threatened by cars
- ✓ 46% more likely: Smoother surface on the roads and fewer potholes
- ✓ 43% more likely: More bike lanes along my route

Voters Urgently Want Safer Streets for All Users

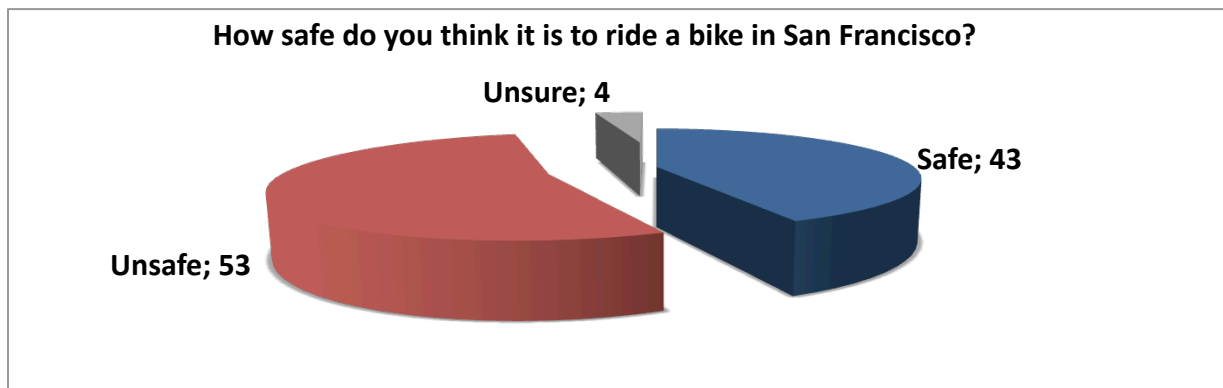


Over two-thirds of voters (68%) support the city adding physically separated bike lanes to improve safety and traffic flow and to allow for more clearly delineated space for all road users.

Importantly, strong majorities of all voters support physically separated lanes that allow for more clearly delineated space for all road users, independent of their primary mode of transit.

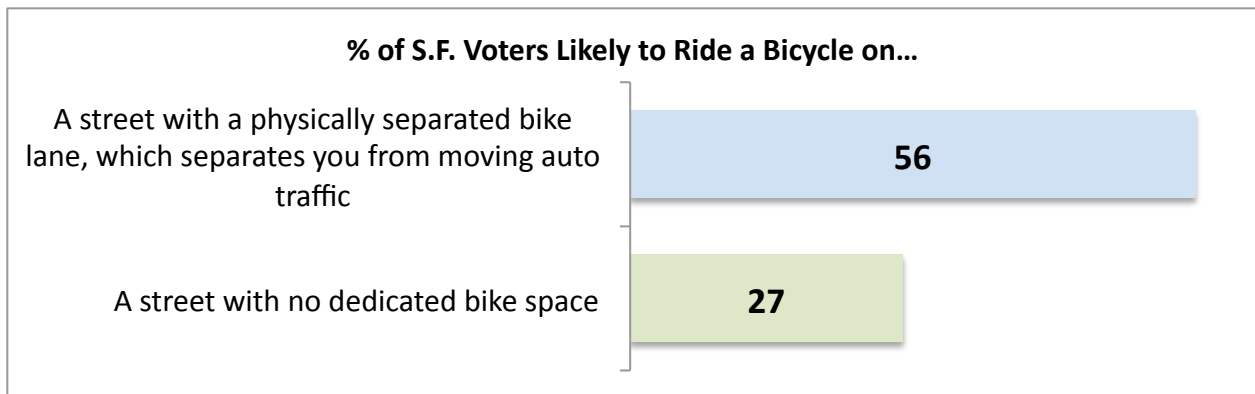
In fact, 61% of voters who drive as their primary method of traveling support the city adding physically separated bike lanes. Support is even strong among those whose primary method of travel in San Francisco is public transportation (70%), is walking (76%), is taking taxi or care shares (65%) and bicycle (90%).

Unfortunately, only 43% of voters view riding a bike in San Francisco’s current condition as safe. A majority 53% say riding a bike in San Francisco is unsafe, with 17% saying *strongly* unsafe.



Street Design Matters to Voters

The importance of street design on the likelihood of voters riding a bicycle is striking: more than twice as many voters say they are likely to ride a bicycle on a street with a physically separated bike line (56%) than a street with no dedicated bike space (27%). Even more remarkable, among voters who never ride a bike in San Francisco currently, 38% say they are likely to ride a bike on a street with a physically separated bike lane.



Appendix: Survey Questions

Below we display the wording and results of the questions appearing in the survey.

- a. Please tell me if you have a favorable or unfavorable opinion of Bay Area Bike Share. If you have not heard of the name, just say so and we will move on. (IF FAVORABLE OR UNFAVORABLE, FOLLOW-UP: Is that strongly un/favorable or just somewhat?)

STRONGLY FAVORABLE	23	→ 50%
SOMEWHAT FAVORABLE	27	
SOMEWHAT UNFAVORABLE	6	→ 11%
STRONGLY UNFAVORABLE	5	
HEARD OF, NO OPINION	12	
HAVE NOT HEARD OF	27	

Now I am going to read some statements people make about transportation and biking in San Francisco. For each statement I read, please tell me if you agree or disagree with the statement. (RANDOMIZE)
 IF AGREE/DISAGREE: Is that strongly, or just somewhat?

	AGREE		DISAGREE		Don't Know	SUMMARY	
	Strong	Some-what	Some-what	Strong		Agree	Disagree
b. Bicycling is good for San Francisco.	44	32	8	11	5	76	19
c. Bicycling in San Francisco should be comfortable and attractive to people of all ages, from small children to seniors.	41	31	11	14	3	72	25
d. City government should do more to encourage bicycling as a routine form of transportation in San Francisco.	32	28	16	21	3	60	37

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- e. City leaders are working to make San Francisco easier to move around by giving people more transportation options, including bicycling. Do you support or oppose the City's goal of increasing the number of bicycle trips to between 10 and 15 percent of all trips in the next five years?

IF SUPPORT/OPOSE: Is that strongly SUPPORT/OPOSE or just somewhat?

STRONGLY SUPPORT	30	→ 62%
SOMEWHAT SUPPORT	32	
SOMEWHAT OPOSE	13	→ 33%
STRONGLY OPOSE	20	
DON'T KNOW	5	

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- f. The City has been working to reduce the potential for conflict between people biking and other street users, and to improve safety by separating bicycling traffic from motor vehicle traffic on city streets.

Do you support or oppose the city adding physically separated bike lanes to improve safety and traffic flow and to allow for more clearly delineated space for all road users?

IF SUPPORT/OPOSE: Is that strongly SUPPORT/OPOSE or just somewhat?

STRONGLY SUPPORT	40	→ 68%
SOMEWHAT SUPPORT	28	
SOMEWHAT OPOSE	12	→ 27%
STRONGLY OPOSE	15	
DON'T KNOW	5	

- g. The City has launched a small bike sharing program, which is already being heavily used. There is a proposal to expand the bike share system to 3,000 bikes in San Francisco.

Do you support or oppose expanding the bike share system to serve San Francisco's neighborhoods?

IF SUPPORT/OPPOSE: Is that strongly SUPPORT/OPPOSE or just somewhat?

STRONGLY SUPPORT	36	→ 65%
SOMEWHAT SUPPORT	29	
SOMEWHAT OPPOSE	12	→ 25%
STRONGLY OPPOSE	13	
DON'T KNOW	10	

- h. How safe do you think it is to ride a bike in San Francisco... Is it (READ CHOICES.)

Very safe	5	→ 43%
Somewhat safe	38	
Somewhat unsafe	36	→ 53%
Very unsafe	17	
DON'T KNOW	4	

How likely are you to ride a bicycle on the following types of streets... very likely, somewhat likely, not very likely, or not at all likely? (RANDOMIZE)

	Likely		Not Likely		Un- sure	SUMMARY	
	Very	Some -what	Some -what	Not at all		Likely	Not Likely
i. A street with no dedicated bike space	8	19	24	44	5	27	68
j. A street with a physically separated bike lane, which separates you from moving auto traffic	28	28	9	31	4	56	40

- k. How often do you ride a bicycle in San Francisco? (READ CHOICES.)

Daily	3
More than once a week	10
A few times a month	12
Once a month or less	18
Never	57
DON'T KNOW	<1

I. Would you like to ride a bicycle more frequently than you do now?

IF YES? Would you like to ride much more, or a little more?

YES, MUCH MORE	19	→ 43%
YES, A LITTLE MORE	24	
NO	55	
DON'T KNOW	2	
REFUSE	<1	

How likely are you to ride a bicycle on the following types of streets... very likely, somewhat likely, not very likely, or not at all likely? (RANDOMIZE)

	MORE LIKELY		Makes No Difference	Don't Know	Summary: More Likely
	Much	Some-what			
m. Feeling less threatened by cars while biking	23	23	49	5	46
n. Smoother surface on the roads and fewer potholes	22	24	50	4	46
o. More bike lanes along my route	21	22	54	3	43

About David Binder Research

David Binder Research has provided innovative and influential research for more than 25 years. David Binder Research is well-known for qualitative and quantitative research, hybrid methodologies, and message and ad testing research.

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