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Survey of San Francisco Likely November 2014 Voters Regarding Attitudes on Employee Shuttles

Prepared for Bay Area Council



March 2014

Methodology

- ▶ Telephone survey of Likely November 2014 Voters in San Francisco
- ▶ March 10 – 16, 2014
- ▶ 500 total interviews
- ▶ Margin of error: ± 4.38 percentage points
- ▶ Interviewing conducted by trained, professional interviewers in English and Cantonese

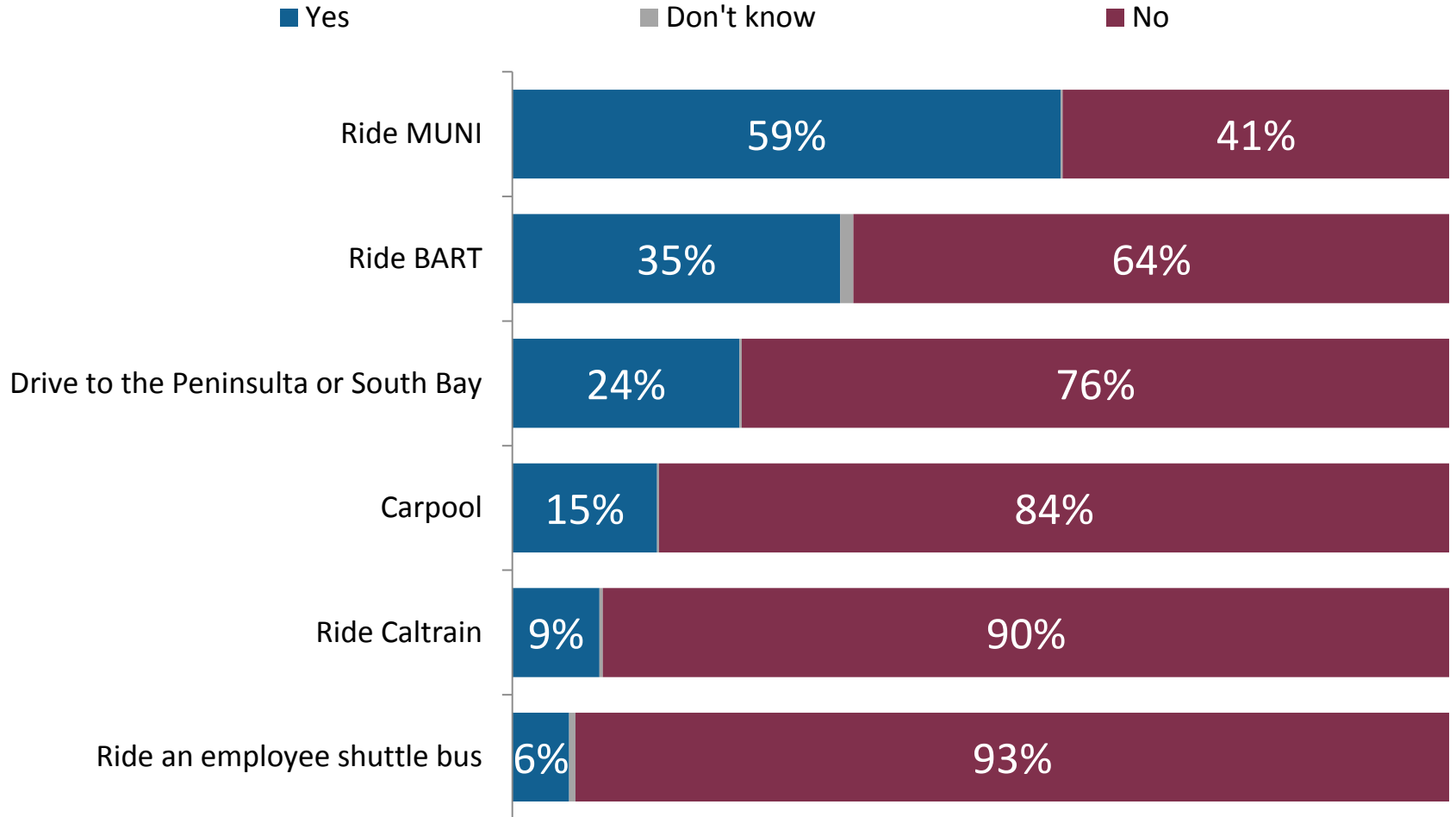
Please note that due to rounding, some percentages may not add up to exactly 100%.

Key Findings

- ▶ San Francisco voters are overwhelmingly positive about the tech industry and the impact tech has had on the city.
- ▶ Despite what it might look like from recent media coverage, a majority of voters have a positive opinion of the shuttle buses and support allowing buses to use MUNI stops.
- ▶ However, voters are also supportive of regulations, including potentially charging companies. And, opinions of the shuttle buses, while positive, are somewhat weak.
- ▶ Although not a majority, a consistent quarter of voters in the city are opposed to the buses, with higher opposition in the eastern side of the city.

Transportation Methods

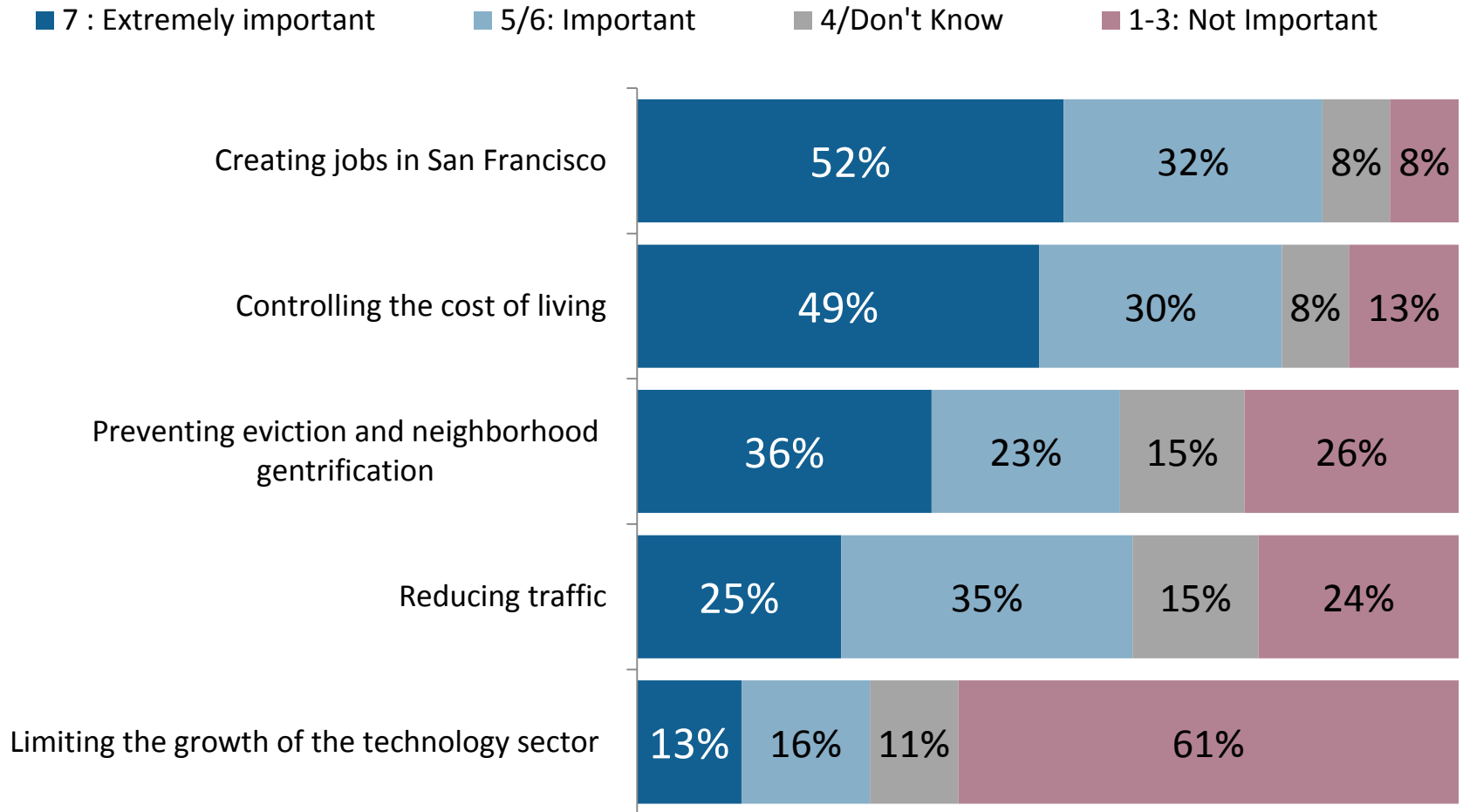
59% of respondents regularly ride MUNI; 6% report using a shuttle



Do you regularly - that is, at least two or three times per week - use each of the following modes of transportation?

Priorities

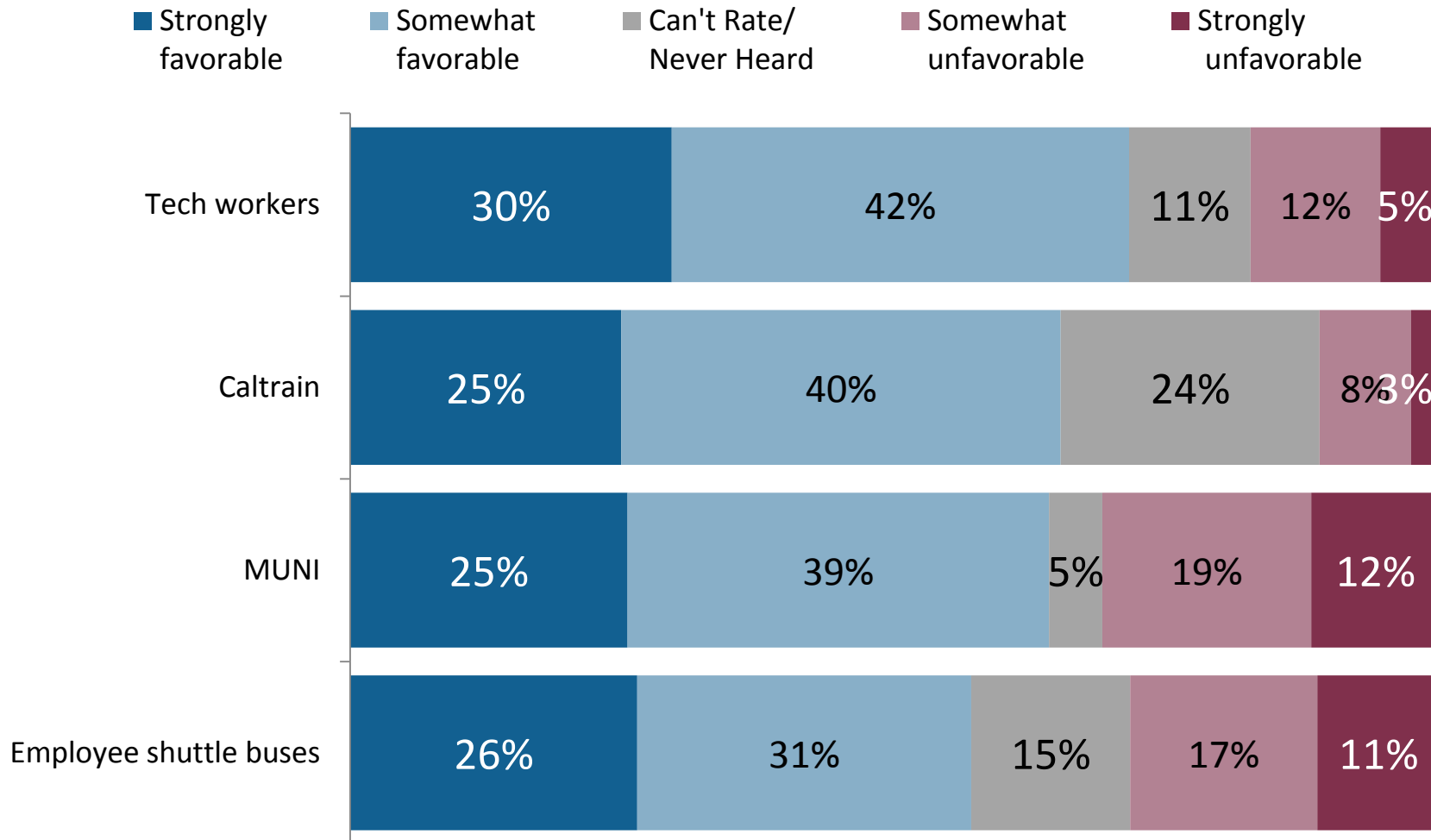
*San Francisco voters are concerned about creating jobs and controlling costs,
Few are interested in limiting growth of the tech sector*



On a scale of one to seven where one is not at all important and seven is extremely important, how important do you think each of the following should be for San Francisco right now?

Favorability

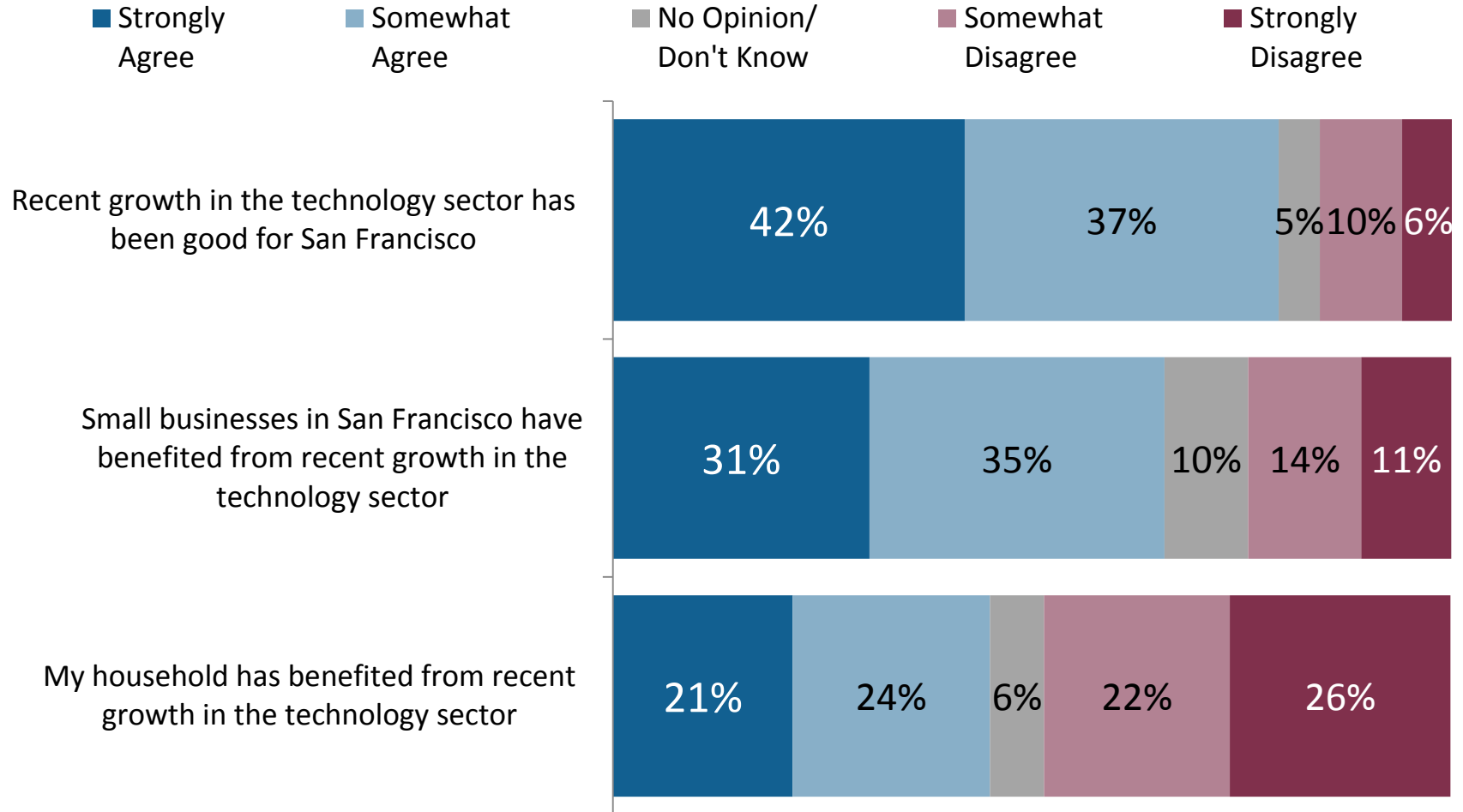
Tech workers and employee shuttle buses are viewed unfavorably by only a minority.



For each one please tell me if you have a strongly favorable, somewhat favorable, somewhat unfavorable or strongly unfavorable opinion.

Feelings about the Technology Sector

An overwhelming majority agree that growth in the tech sector has been good for SF; however, many disagree that it has been good for their own household.

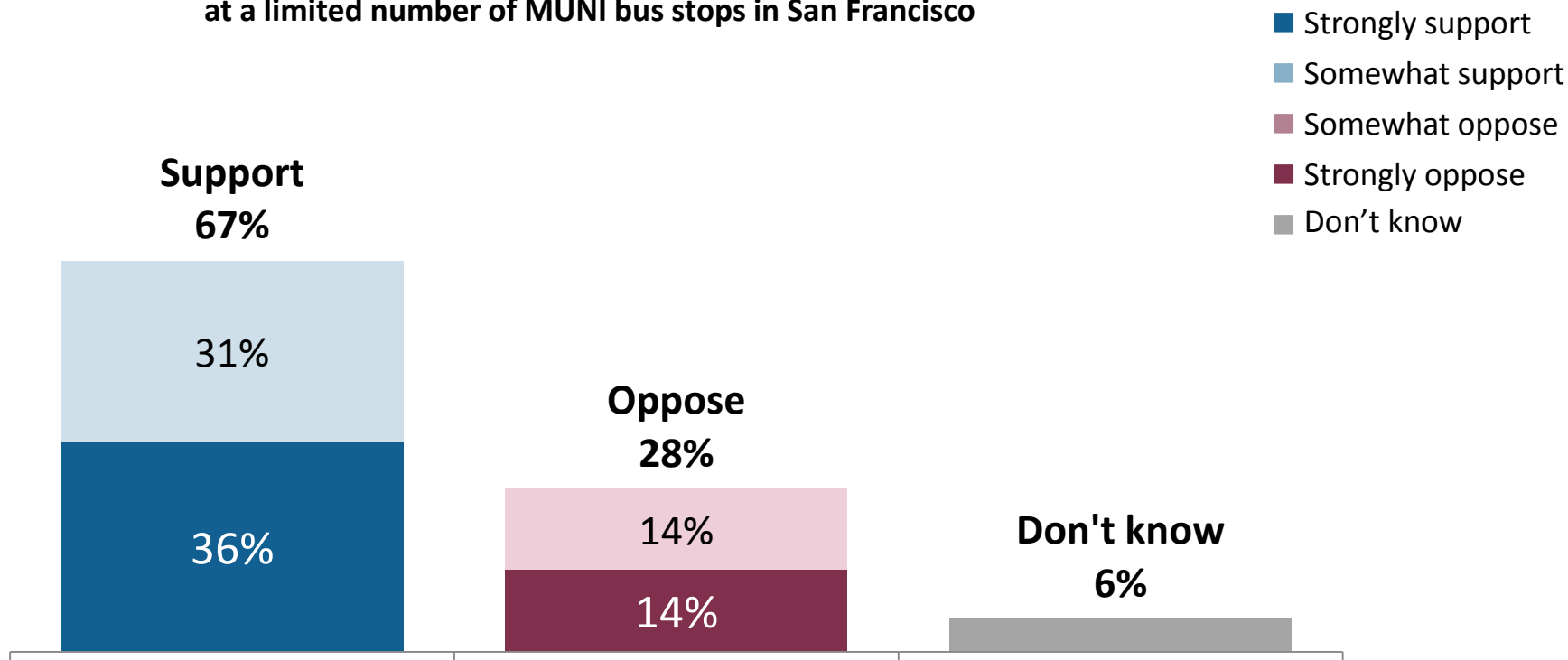


Please tell me if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with each of the following statements:

Support for Allowing Shuttle Buses

*Two-thirds support allowing shuttle buses to MUNI stops.
Only a small minority are strongly opposed.*

**Allowing employee shuttle buses to pick up and drop off passengers
at a limited number of MUNI bus stops in San Francisco**

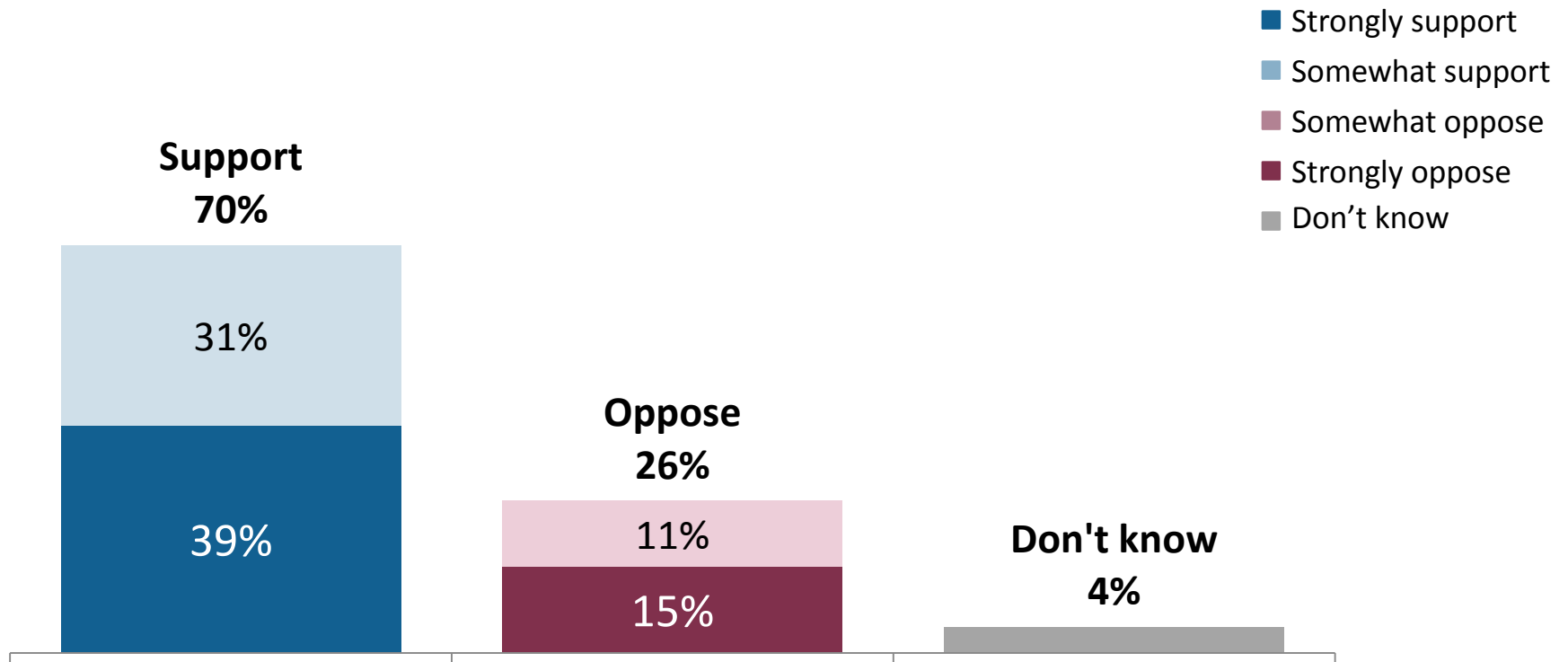


Would you say you strongly support, somewhat support, somewhat oppose or strongly oppose allowing employee shuttle buses to pick up and drop off passengers at a limited number of MUNI bus stops in San Francisco?

Support for Regulating Shuttle Buses

Although voters want to allow the buses, the vast majority also want regulation.

Regulating employee shuttle buses in San Francisco

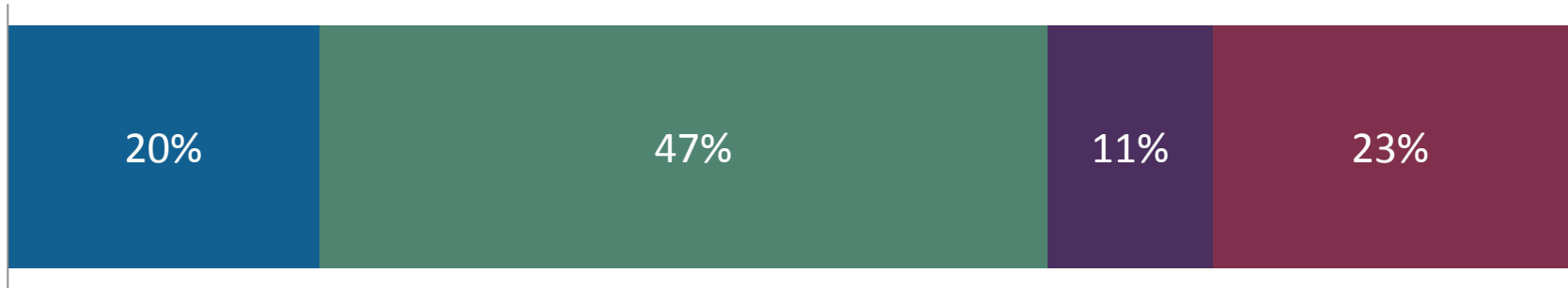


Some people have proposed regulations on employee shuttle buses that use MUNI bus stops to pick up and drop off passengers. Do you strongly support, somewhat support, somewhat oppose or strongly oppose regulating employee shuttle buses in San Francisco?

Allow/Regulate Segmentation

Almost half of all voters want to allow the shuttles, but with regulation. One-third don't want the busses at all.

■ Allow, don't Regulate ■ Allow & Regulate ■ Don't Allow or Regulate ■ Regulate, don't Allow



Allow, don't Regulate: Respondents who said they support allowing employee shuttle buses to pick up passengers at MUNI stops and oppose regulating them.

Allow & Regulate: Respondents who said they support allowing the shuttle buses to use MUNI stops and support regulating them.

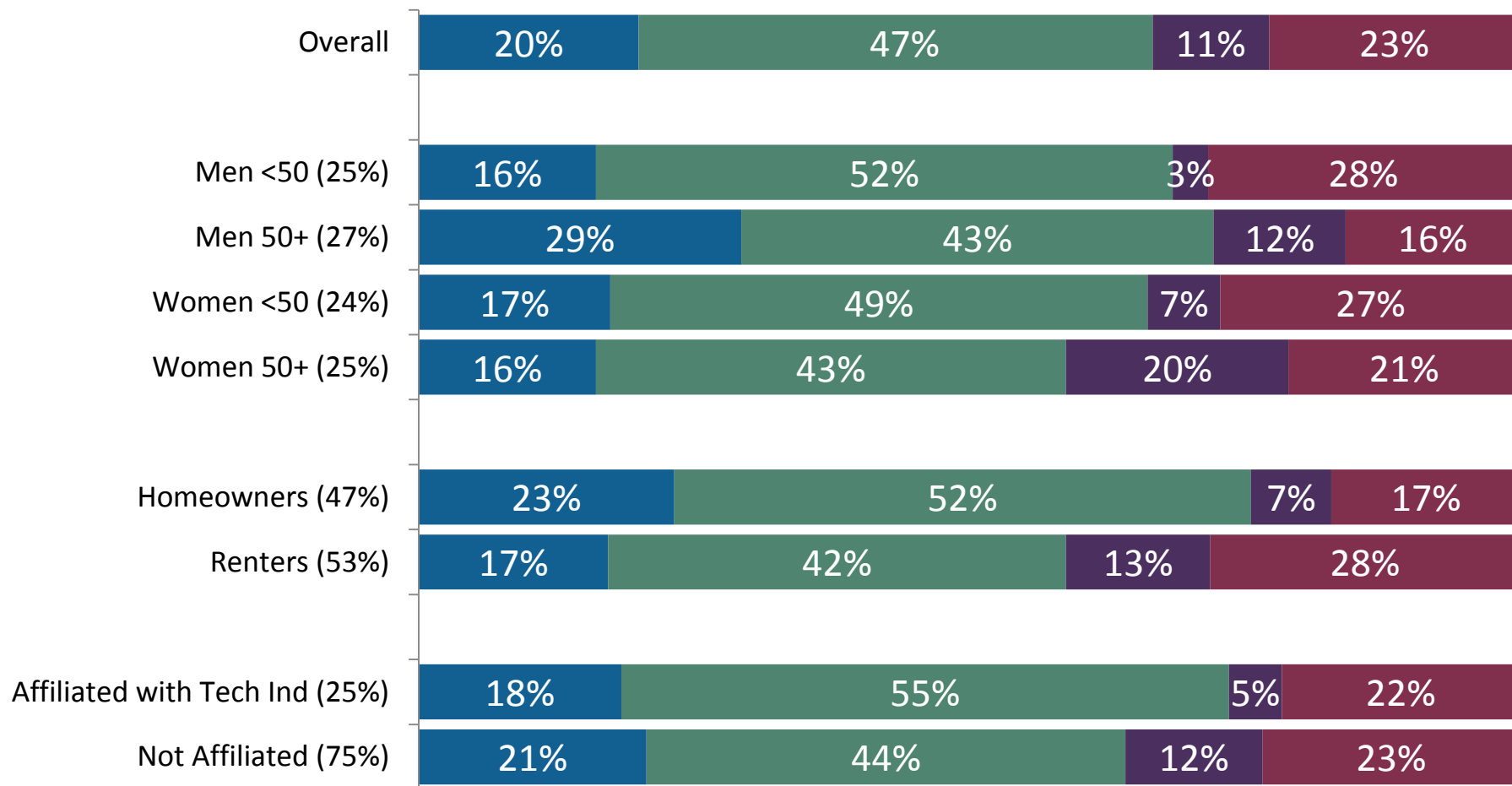
Don't Allow or Regulate: Respondents who said they oppose allowing the shuttles to use MUNI stops and oppose regulating them.

Regulate, don't Allow: Respondents who said they oppose allowing the shuttles to use the MUNI stops and support regulating them.

Support Segmentation by Subgroups

41% of both women over 50 and renters do not support allowing shuttles to use MUNI stops

■ Allow, don't Regulate
 ■ Allow & Regulate
 ■ Don't Allow or Regulate
 ■ Regulate, don't Allow

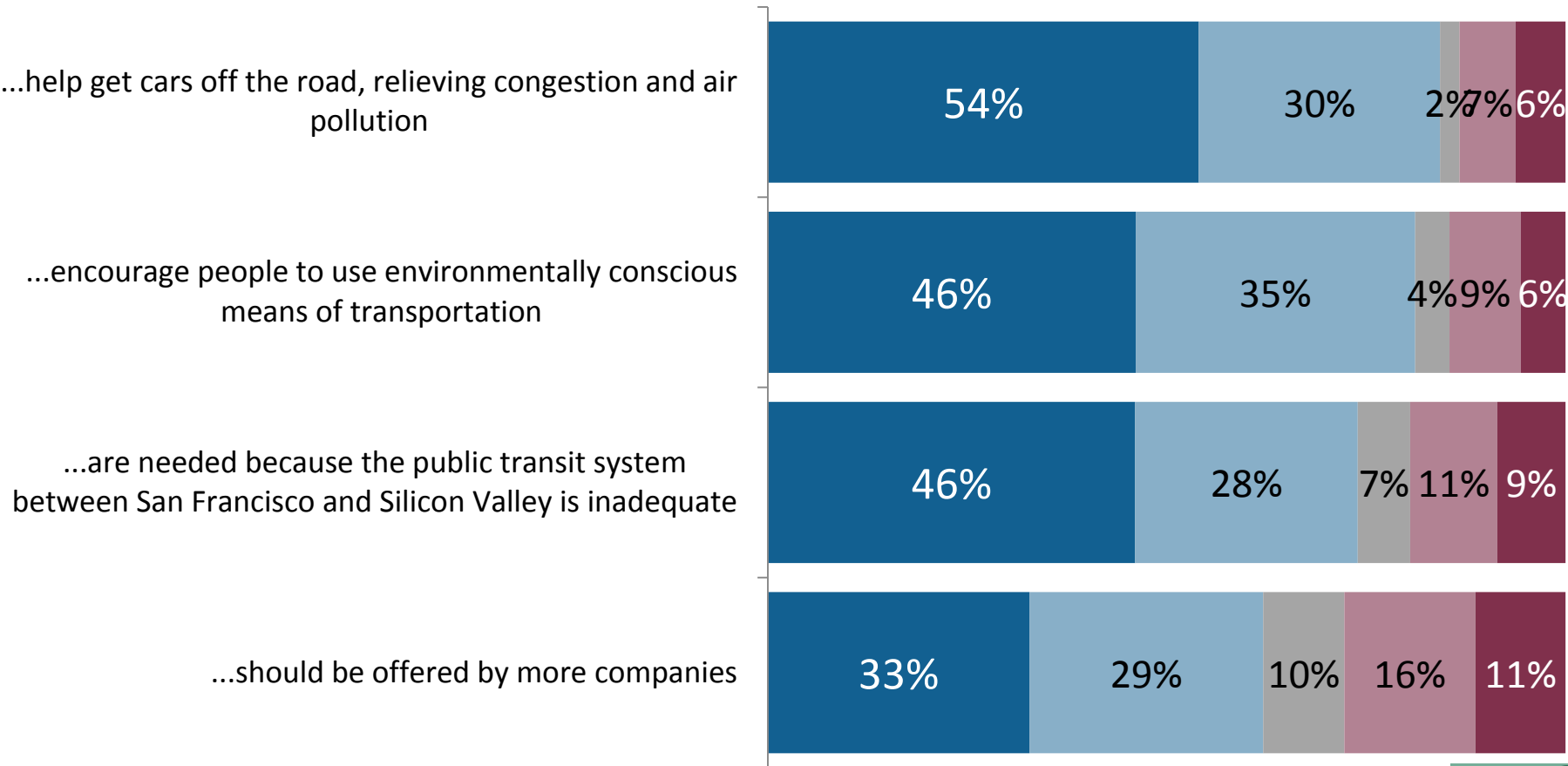


Shuttle Bus Attributes

The vast majority of San Francisco voters believe that the shuttle buses are a helpful component of our transportation network

Employee shuttle buses...

■ Strongly Agree
 ■ Somewhat Agree
 ■ No Opinion/Don't Know
 ■ Somewhat Disagree
 ■ Strongly Disagree



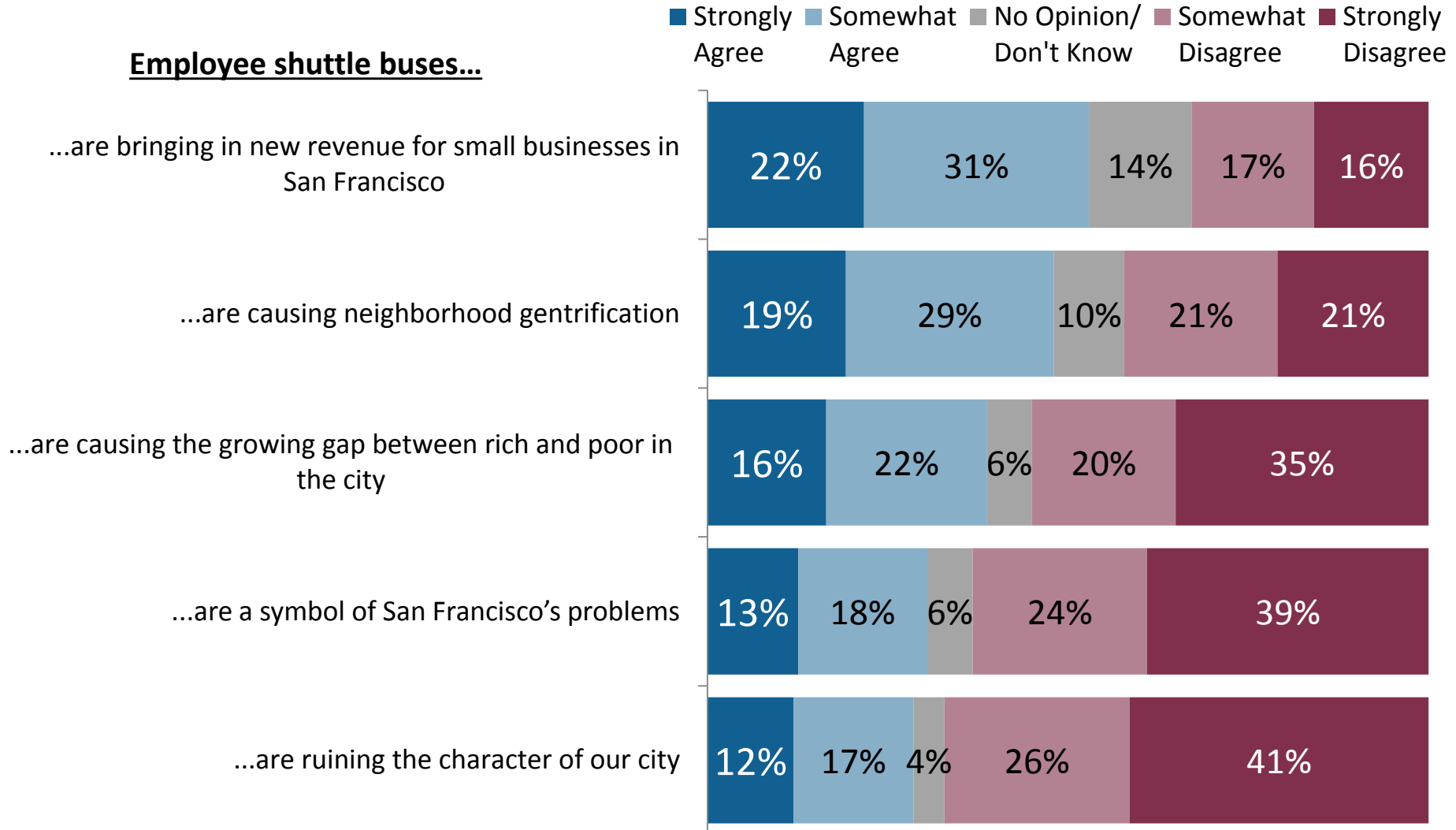
Now, thinking specifically about employee shuttle buses in San Francisco, please tell me if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with each of the following statements:



Shuttle Bus Attributes

About one-quarter of voters think the shuttles are ruining the city

Employee shuttle buses...

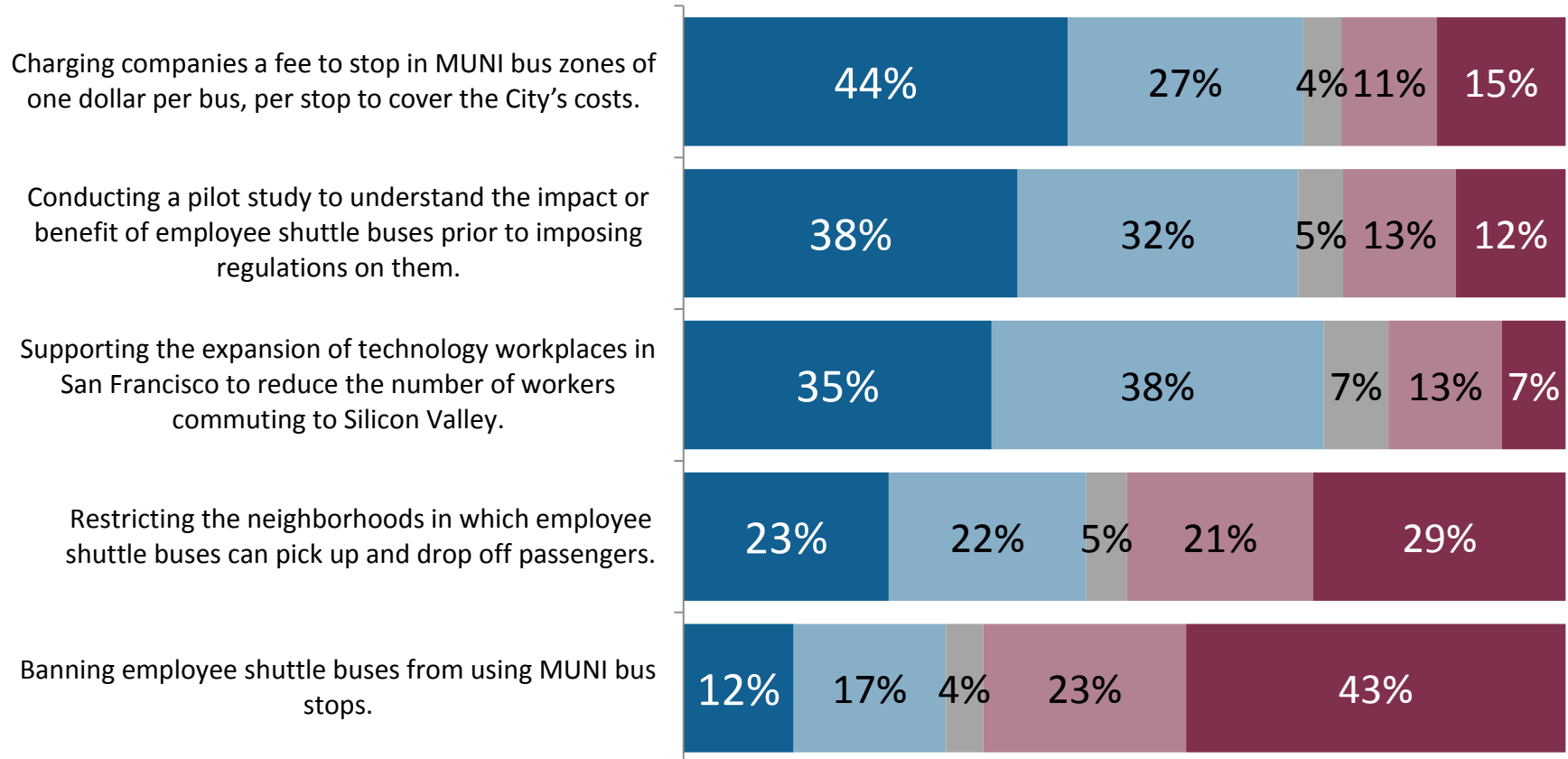


Now, thinking specifically about employee shuttle buses in San Francisco, please tell me if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with each of the following statements:

Support for Regulations, Ideas

Although support for shuttles is high, imposing regulations and payment have significant support

■ Strongly favor
 ■ Somewhat favor
 ■ Don't know
 ■ Somewhat oppose
 ■ Strongly oppose



Please tell me if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with each of the following statements: