Geary Corridor Bus Rapid Transit
Conceptual Engineering and Environmental Analysis

Merchant Survey
Preliminary Results

SAN FRANCISCO COUNTY TRANSPORTATION AUTHORITY
Geary Citizens Advisory Committee
July 11, 2013
Methodology

Door-to-door merchant outreach from Gough to 33rd Ave.

- Outreach on weekdays and a Saturday in May
- All businesses visited at least twice
- Fact sheets distributed, owners/managers surveyed
- Also visited Clement St. businesses
Survey responses

• Geary: 569 businesses visited
  202 survey responses (35%)
• Clement: 295 businesses visited
  58 survey responses (19%) - not included in analysis
• Compared with previous customer survey (Arguello –26th)

Number of surveys collected by corridor segment

Total Reponses: 260
Characteristics of Geary businesses

- Over 70% employ 5 or fewer people
- Most have 50 or fewer daily customers

How many customers visit your business location on an average day?

<table>
<thead>
<tr>
<th>Number of Customers</th>
<th>Percent of Total Responses</th>
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<tbody>
<tr>
<td>1 to 20</td>
<td>30%</td>
</tr>
<tr>
<td>21 to 50</td>
<td>20%</td>
</tr>
<tr>
<td>51 to 100</td>
<td>15%</td>
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<tr>
<td>101 to 200</td>
<td>10%</td>
</tr>
<tr>
<td>More than 200</td>
<td>5%</td>
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How customers travel to Geary: customer and merchant responses

**Customers** surveyed arrived at the corridor by:

- Walk or Bike: 49%
- Transit: 28%
- Auto: 22%

**Merchants** surveyed estimated that their customers arrive by:

- Walk or Bike: 18%
- Transit: 25%
- Auto: 54%
Perceptions of parking difficulty

Merchants said parking for customers arriving by car is...

- 26% ...usually available.
- 28% ...sometimes difficult.
- 46% ...usually difficult.

Over 70% of auto customers said...

- They parked less than 2 blocks from their destinations
- It took less than 5 minutes to find a spot
Improvements to Geary Boulevard: merchant priorities

What would be your highest priority change for Geary Boulevard?

- Preserve parking: 40% of responses
- Faster, More Reliable Muni: 20% of responses
- Pedestrian Safety: 10% of responses
- Something else: 10% of responses
- Sidewalk amenities: 5% of responses
- Landscaping: 5% of responses

Muni: faster and more reliable transit system

Parking:

Safety:

Sidewalk

Amenities:

Landscaping:

Other:

Percent of Responses
What would be your highest priority change for Geary Boulevard?

- Preserve parking
- Faster, More Reliable Muni
- Pedestrian Safety
- Something else
- Sidewalk amenities
- Landscaping

Percent of Responses

- Merchants
- Customers
Effect of BRT on businesses: merchants’ views

Would faster and more reliable transit service with pedestrian and streetscape enhancements but some parking removal be good or bad for your business?
Effect of BRT on businesses: merchants’ and customers’ views

Customers: Would you be more or less likely to visit Geary businesses if Muni were faster and more reliable and some parking were removed?

- **Merchants**
  - Good / More Likely: 15%
  - Bad / Less Likely: 40%
  - Little or No Effect: 20%
  - Not Sure: 25%

- **Customers**
  - Good / More Likely: 30%
  - Bad / Less Likely: 45%
  - Little or No Effect: 20%
  - Not Sure: 5%
Survey conclusions

Merchants consider parking critical to their success

• Many think BRT with a parking trade-off would hurt businesses

Yet...

• Survey results indicate a disconnect between merchants and customers regarding how many customers are driving to Geary businesses
• Customers say they would be at least as likely visit Geary businesses with BRT (even with some parking loss)

Next Steps: Incorporate findings into merchant and public outreach in the fall
Questions?