

Inner Sunset Green Benefit District

# NEIGHBORHOOD NEEDS SURVEY

June 2017

Prepared by Build Public & Boston Research Technologies

In collaboration with San Francisco Public Works & Inner Sunset GBD Formation Committee

# EXECUTIVE SUMMARY

As part of an effort to form a Green Benefit District (GBD), a group of community members circulated a Neighborhood Needs Survey to over 3,480 property owners & businesses in the Inner Sunset neighborhood in Spring 2017. The survey results showed a strong interest to form a GBD, and a general willingness to pay for enhanced services & improvements in the Inner Sunset neighborhood.

69% of homeowner respondents and 47% of business owner respondents in the study area indicated that they were very willing or somewhat willing to pay an assessment to fund public realm improvements in the Inner Sunset. 51% of all respondents indicated that they would support the formation of a GBD, and an additional 41% felt the GBD was an interesting idea, but would need more information.



# ABOUT THE SURVEY

## CONTEXT

A group of stakeholders representing residents, merchants and institutions in the Inner Sunset have been exploring the potential formation of a Green Benefit District (GBD) since July 2016. A GBD could help to maintain and beautify public spaces in the neighborhood, while providing a platform for advocacy, empowerment and investments for better community life

The process of forming a GBD involves multiple phases, including a petition, ballot and extensive community engagement throughout. As part of this formation effort, this group of stakeholders - or the Inner Sunset GBD Formation Committee - conducted a Neighborhood Needs Survey in Spring 2017 to gauge interest in public realm improvements and willingness to support a GBD.

## DESIGN

The survey questionnaire was designed and reviewed by the Inner Sunset GBD Formation Committee, Build Public, and Boston Research Technologies (BRT).

Build Public is a San Francisco based non-profit organization focused on financing, creating and maintaining public spaces, and is a formation partner in the community-based effort to form an Inner Sunset GBD. BRT is a leading market research expert in the financial services industry, and offered pro bono services for this survey.

## DISTRIBUTION

- Notice mailed to every parcel address in the study area using the City Assessor's data, announcing the online survey
- Announcements on various email lists and networks, including Inner Sunset Park Neighbors, Inner Sunset Merchants Association and Friends of the Urban Forest
- Posts on social media, including Facebook & Next Door
- Outreach events, including block parties & public meetings
- Sidewalk canvassing along Lincoln Way using pop-up displays
- Door-to-door outreach
- Posters in merchant windows along commercial corridor
- Tables at community events, including the Farmers' Market & Flea Market

# FIELDING OF THE SURVEY

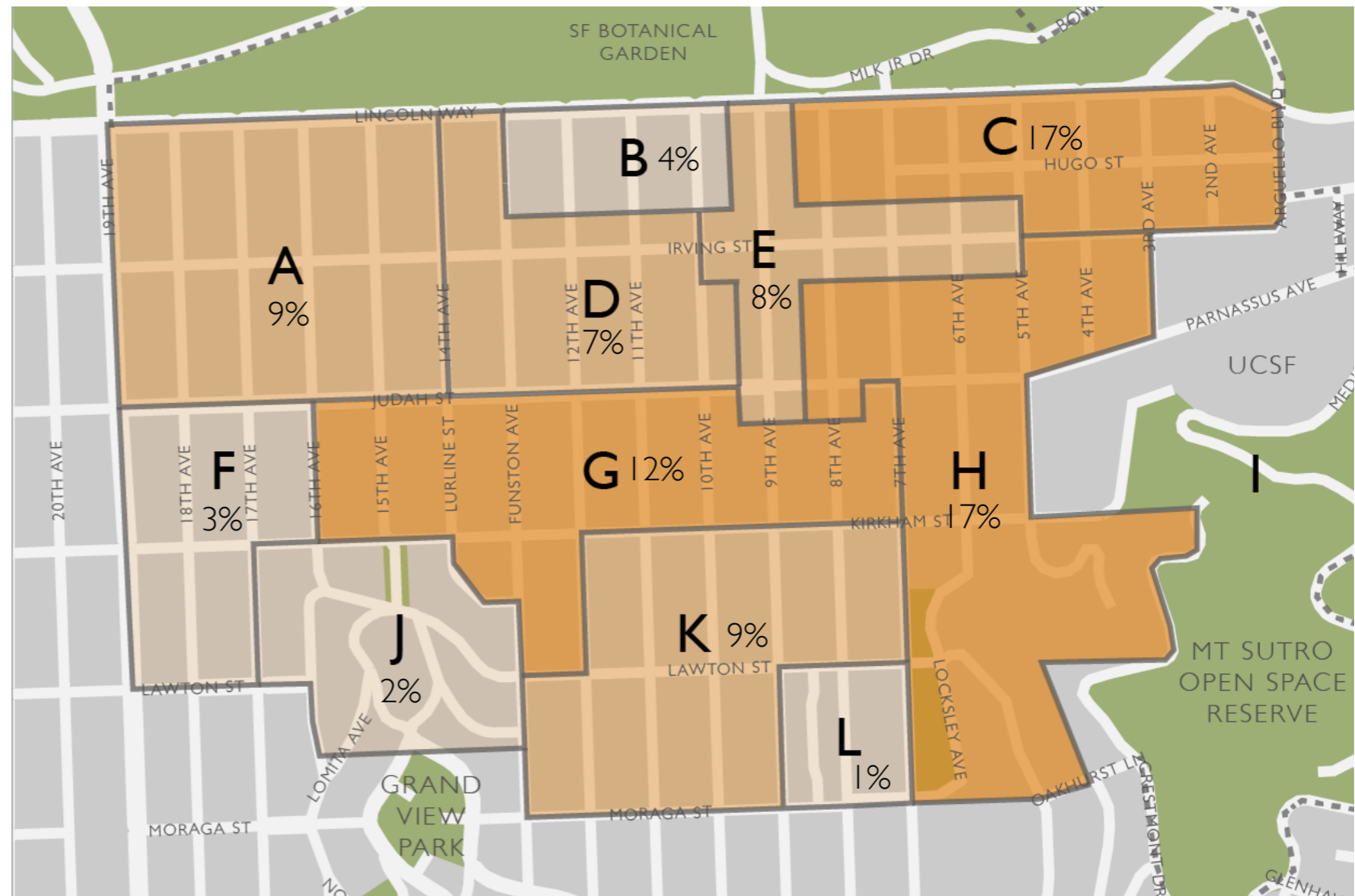


- The study area contains 3,487 parcels, of which 85% are zoned residential and 7% are zoned commercial
  - Survey responses were collected over a four-week period in Spring 2017, between April 19-May 31
  - A total of 679 useable responses were received, a 19.5% response rate
  - The sample size has the following maximum sampling errors, at a 95% confidence level:
    - ▶ Residents +/- 3.9 percentage points
    - ▶ Homeowners +/- 3.8 percentage points
    - ▶ Businesses +/- 8.0 percentage points
- Actual populations for residents & businesses are unknown, so we could not apply an adjustment factor. It is very likely that the sampling error is smaller than stated.
- The data was tabulated by Boston Research Technologies

# DISTRIBUTION OF RESPONSES

Response to the survey was very strong, with the majority of survey responses coming from Zones C, G and H.

Zone	Responses	% Total
A	61	9%
B	25	4%
C	115	17%
D	49	7%
E	54	8%
F	17	3%
G	84	12%
H	114	17%
J	15	2%
K	61	9%
L	9	1%
None	66	10%
<b>TOTAL</b>	<b>679</b>	<b>100%</b>



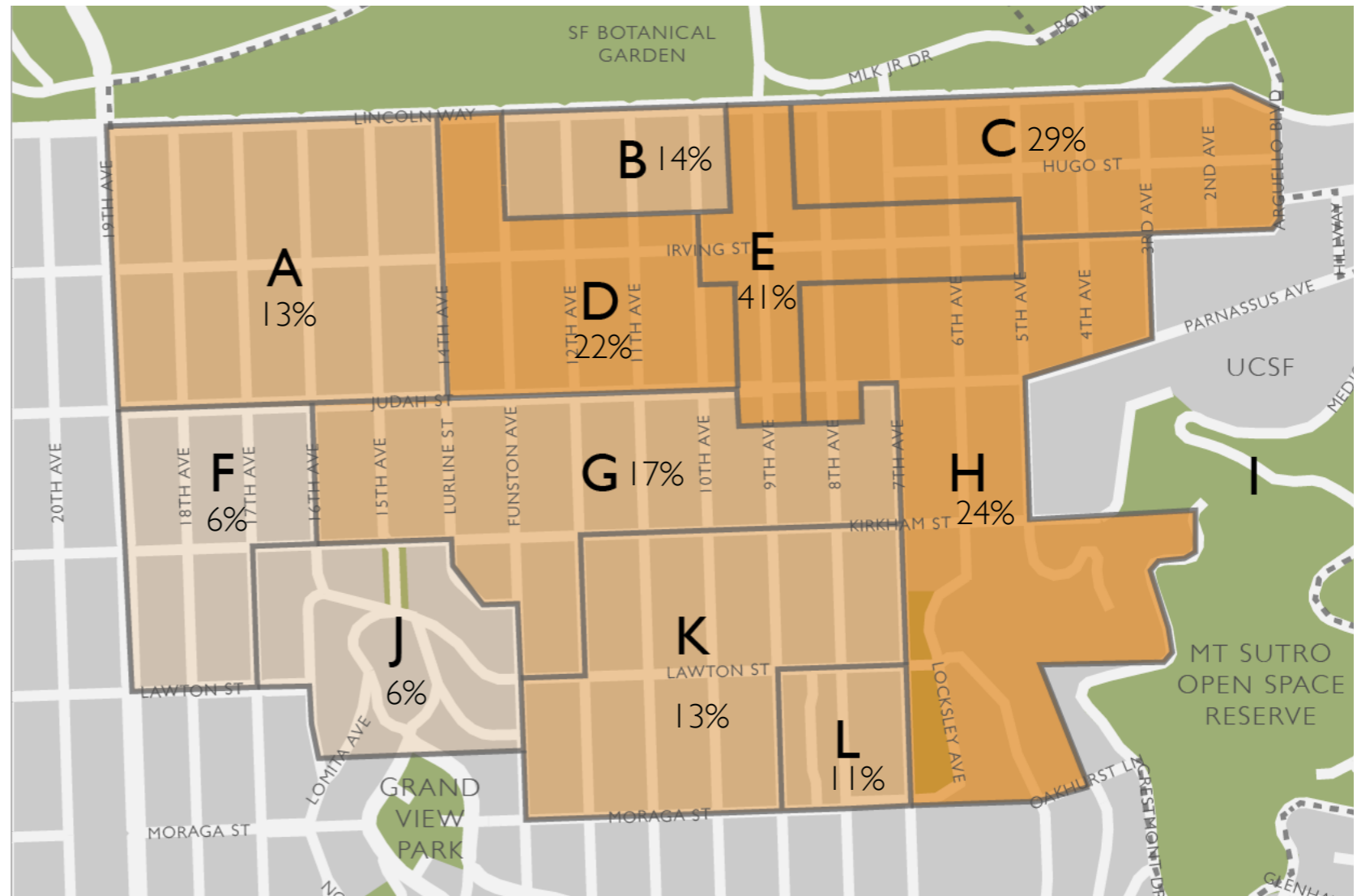
Percentages represent each zone's share of the total survey responses received

Note: Park institutions & UCSF have expressed interest in participating in a GBD, but are excluded from this analysis due to their institutional status & disproportionate influence on survey results as large property owners

# RESPONSE RATES BY ZONE

Response rates provide a sense of survey participation relative to the number of parcels.

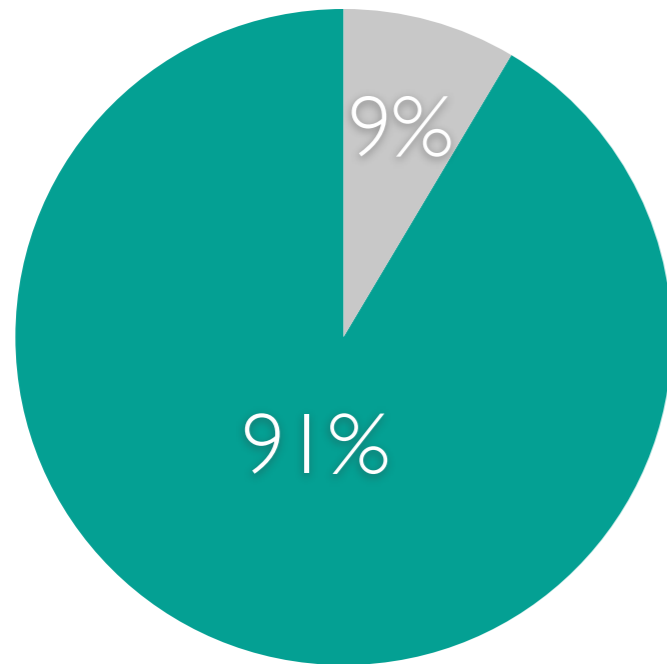
Zone	Parcels	Response Rate
A	482	13%
B	182	14%
C	393	29%
D	219	22%
E	132	41%
F	267	6%
G	506	17%
H	476	24%
J	265	6%
K	466	13%
L	82	11%
None	12	13%
<b>TOTAL</b>	<b>3,487</b>	<b>19%</b>



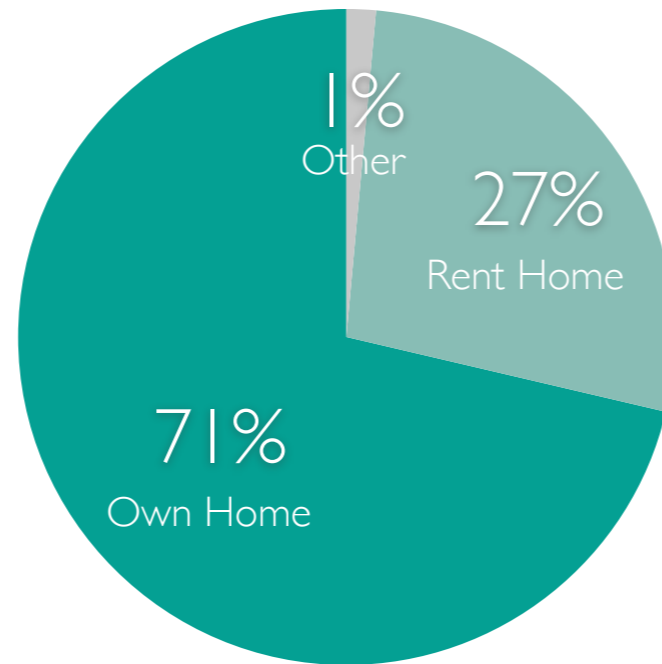
Percentages indicate response rates in each zone.

Note: Park institutions & UCSF have expressed interest in participating in a GBD, but are excluded from this analysis due to their institutional status & disproportionate influence on survey results as large property owners

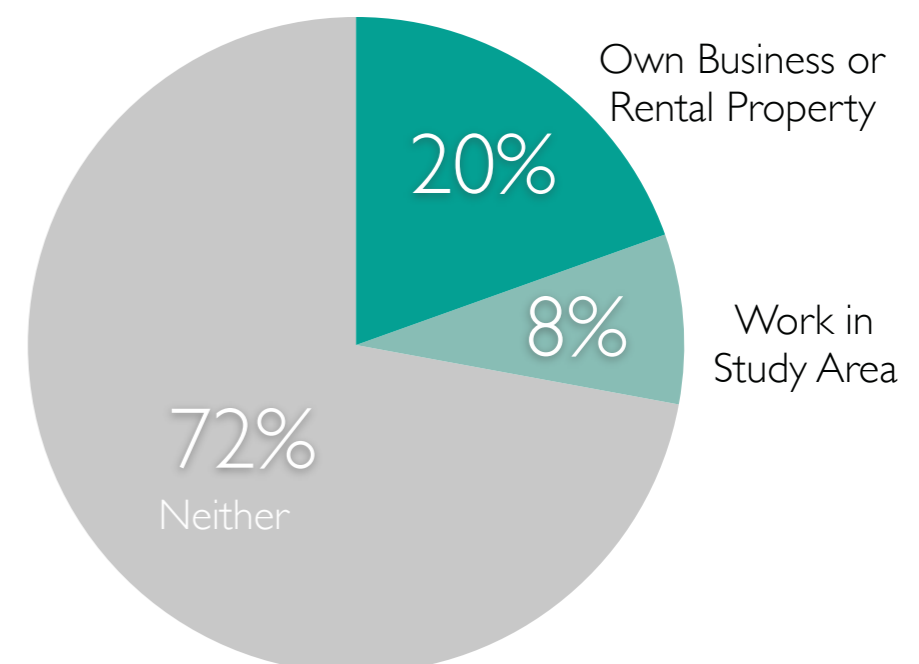
# SURVEY RESPONDENTS



**91%** Live in Study Area

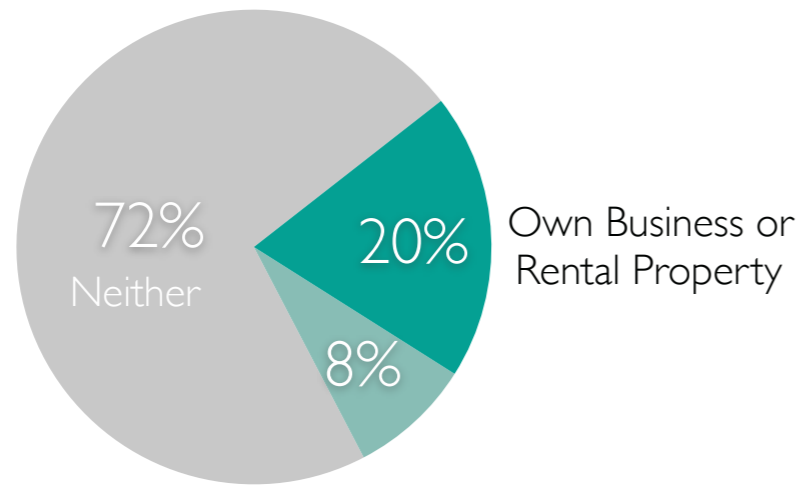


**71%** Own a Home in Study Area

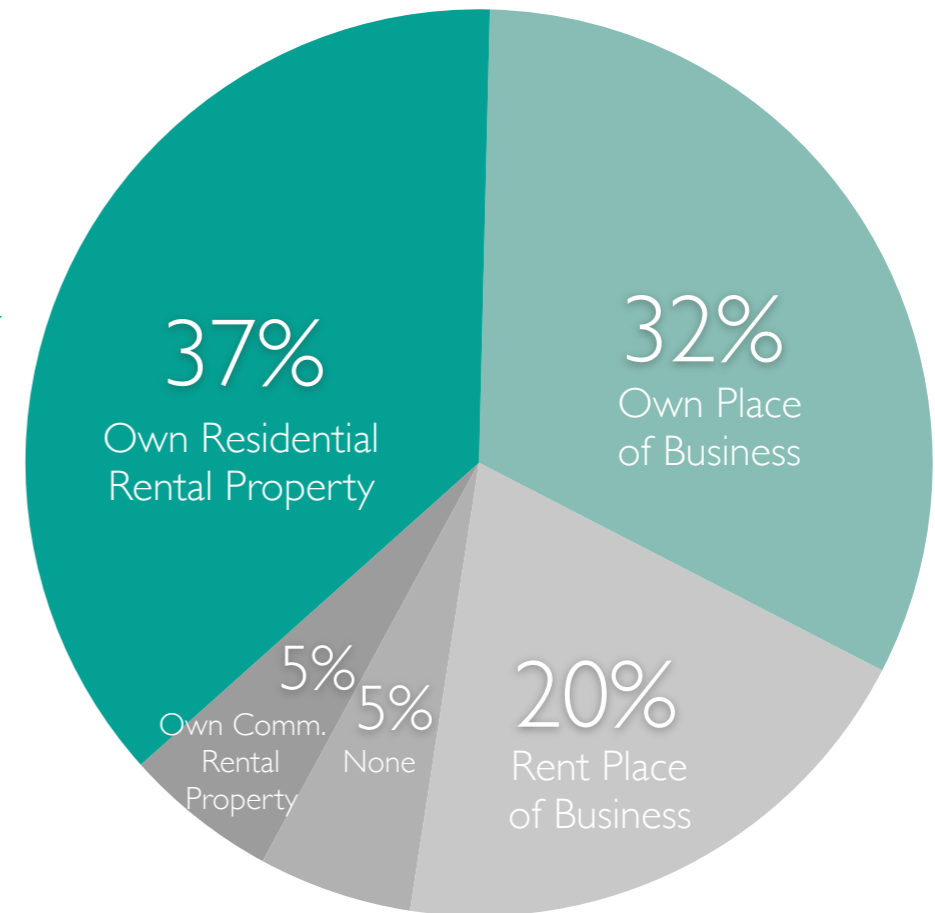


**20%** Own a Business or Rental Property in Study Area

# SURVEY RESPONDENTS



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Types of Business or Property Ownership

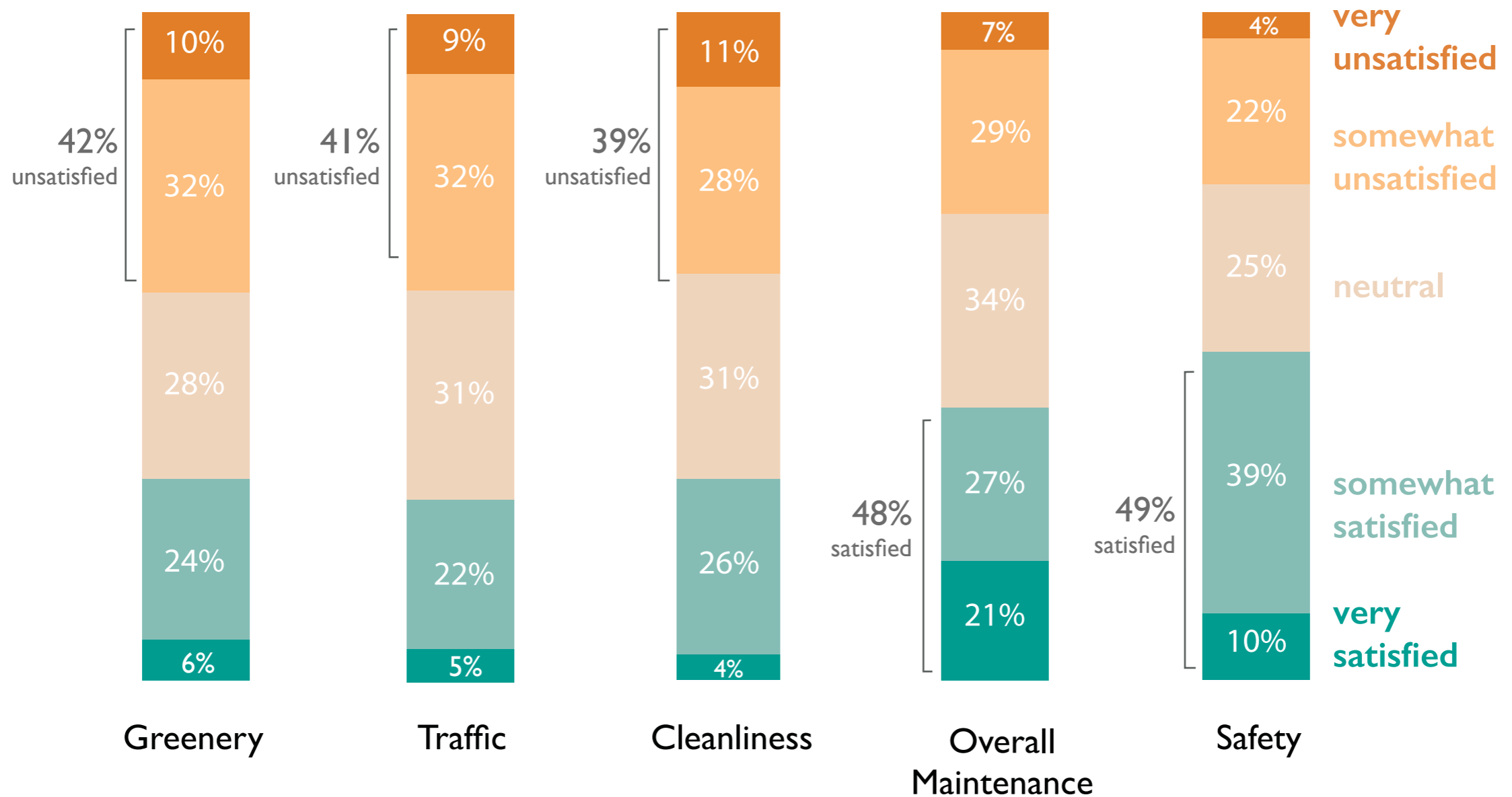
Note: In the survey, "business" was defined as selling products and services and/or owning a property rented out for residential or commercial purposes.



# DETAILED ANALYSIS

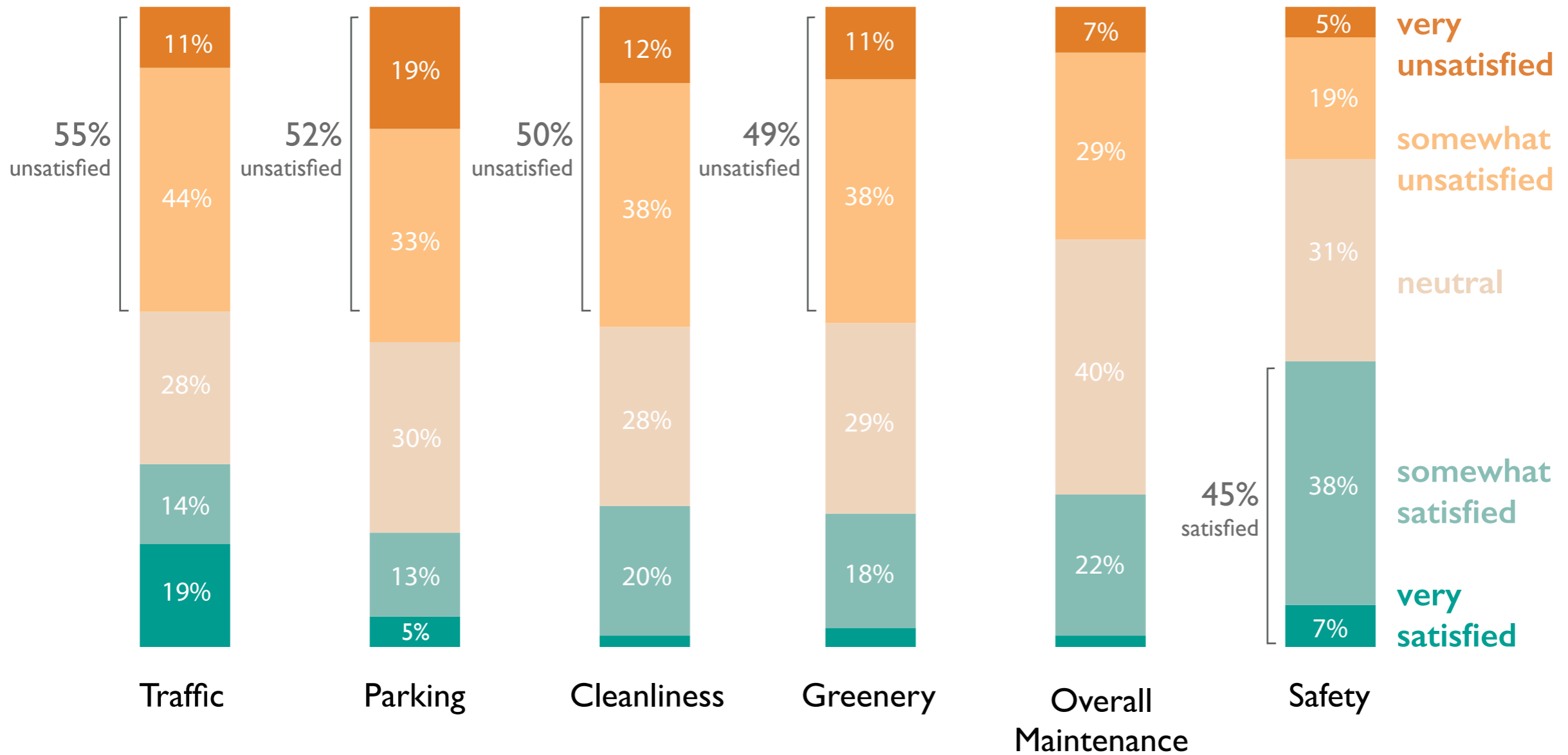
# LEVEL OF SATISFACTION: Residential Areas

Respondents were asked to indicate their **level of satisfaction** with the quality & condition of the public realm in residential areas within the study area. Respondents appear to be most dissatisfied with greenery, traffic & cleanliness.



# LEVEL OF SATISFACTION: Commercial Corridor

Respondents were asked to indicate their **level of satisfaction** with the quality & condition of the commercial corridor (9th Ave & Irving) in the study area. People appear to be most dissatisfied with traffic, parking, cleanliness & greenery.



## Residential Areas

# PRIORITY SERVICES & IMPROVEMENTS:

The chart below indicates percent of respondents that felt the following services & improvements should be a high, moderate or low priority for the GBD:

HIGH	MED	LOW	SERVICE / IMPROVEMENT
64%	29%	8%	Tree planting, staking, replacement & care (Greening)
60%	29%	11%	Lighting, clear crosswalks, pedestrian safety (Connectivity)
47%	34%	18%	Sidewalk gardens & planters (Greening)
44%	35%	21%	Proactive graffiti removal (Enhanced Cleaning)
43%	36%	20%	Improved irrigation systems, pathway repairs, furnishings (Golden Gate Park Spot Improvements)
40%	40%	20%	Locally managed & proactive platform that provides one-stop shop for neighborhood (Advocacy)
39%	46%	15%	Sidewalk & gutter sweeping (Enhanced Cleaning)
37%	41%	22%	Libraries & schools (Enhanced Access & Upkeep)
28%	51%	21%	Community gardens (Enhanced Access & Upkeep)

# Commercial Areas

## PRIORITY SERVICES & IMPROVEMENTS

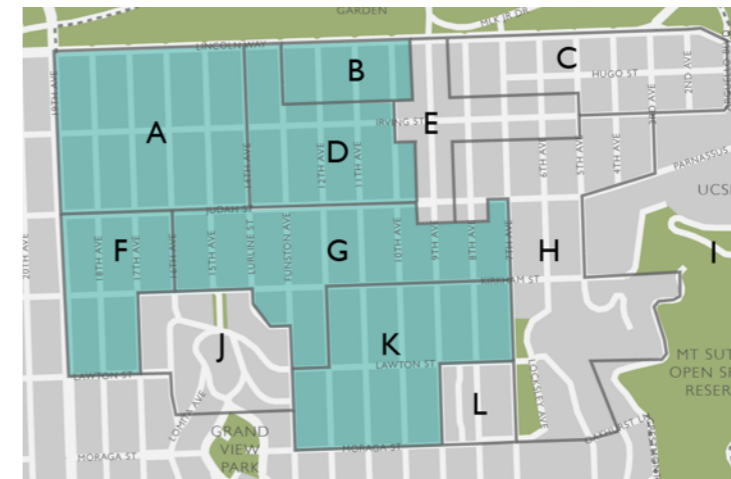
The chart below indicates percent of respondents that felt the following services & improvements should be a high, moderate or low priority for the GBD:

HIGH	MED	LOW	SERVICE / IMPROVEMENT
59%	31%	10%	Tree planting, staking, replacement & care (Greening)
55%	35%	10%	Sidewalk & gutter sweeping (Enhanced Cleaning)
51%	32%	18%	Proactive graffiti removal (Enhanced Cleaning)
50%	33%	16%	Neighborhood Ambassadors (Safety)
48%	36%	13%	Power washing & steam cleaning of sidewalks (Enhanced Cleaning)
45%	36%	19%	Additional SFPD Beat Officer (Safety)
31%	46%	23%	Locally managed & proactive platform that provides one-stop shop for commercial corridor (Advocacy)
28%	36%	36%	Improved wayfinding, valet program, street parking reconfiguration (Parking & Transport)
27%	43%	30%	Banners, holiday lighting, seasonal events (Promotion)

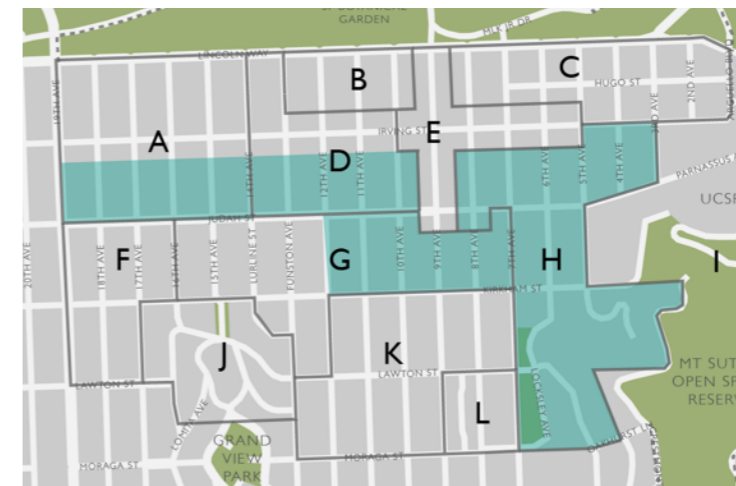
# PRIORITY CAPITAL IMPROVEMENTS

Respondents expressed strong interest in the following activities & improvements that could be implemented by a GBD, but would require a longer timeline & more resources than those listed on the previous page. The chart below indicates the percent of respondents that felt the following capital projects should be a **high or moderate priority** for the GBD, as opposed to a moderate or low priority:

HIGH	MED	LOW	PROJECT
48%	33%	19%	Undergrounding utility wires
43%	32%	25%	Protected bike lanes & landscaped medians
40%	29%	31%	Improved Golden Gate Park entrance at 9th; new park access between 9th-19th Ave
38%	43%	19%	Green infrastructure for storm water management
30%	36%	34%	Park at 7th & Lawton vacant lot
28%	38%	34%	Create community gathering spaces



Areas in which over 50% respondents marked undergrounding of utility wires as a high priority



Areas in which over 50% respondents marked protected bike lanes & landscaped medians as a high priority

# WILLINGNESS TO PAY

The survey asked business & property owners about their willingness to pay an annual GBD assessment using monadic price testing. It rotated three prices for residential property owners and five prices for commercial property owners. The chart below captures the percent of survey respondents that were either “very willing” or “somewhat willing” to pay at these price points.



A majority of respondents expressed willingness to pay a GBD assessment between \$150-\$500 per year.

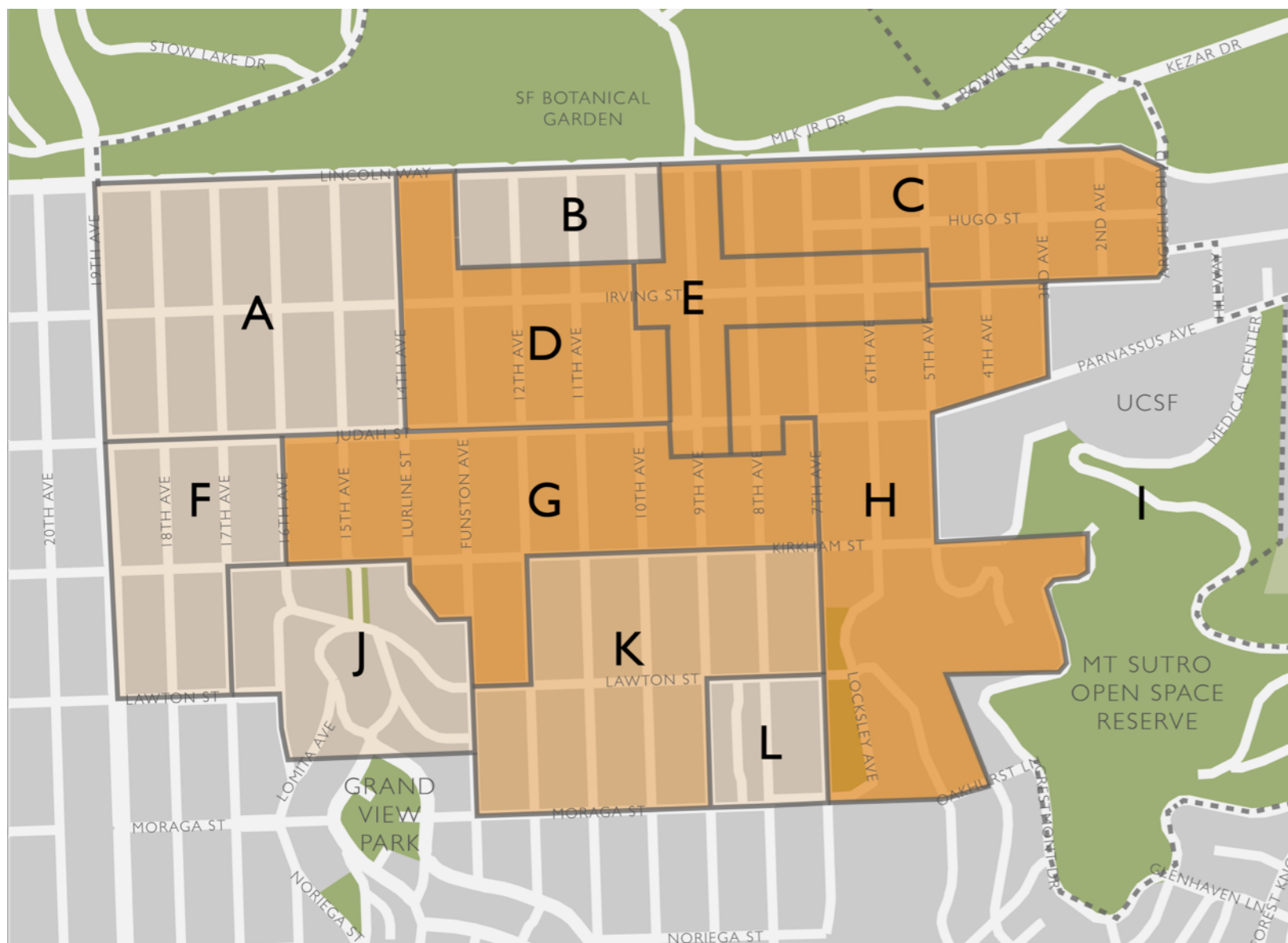
## Residential property owners

- Somewhat willing
- Very willing

## Commercial property owners

- Somewhat willing
- Very willing

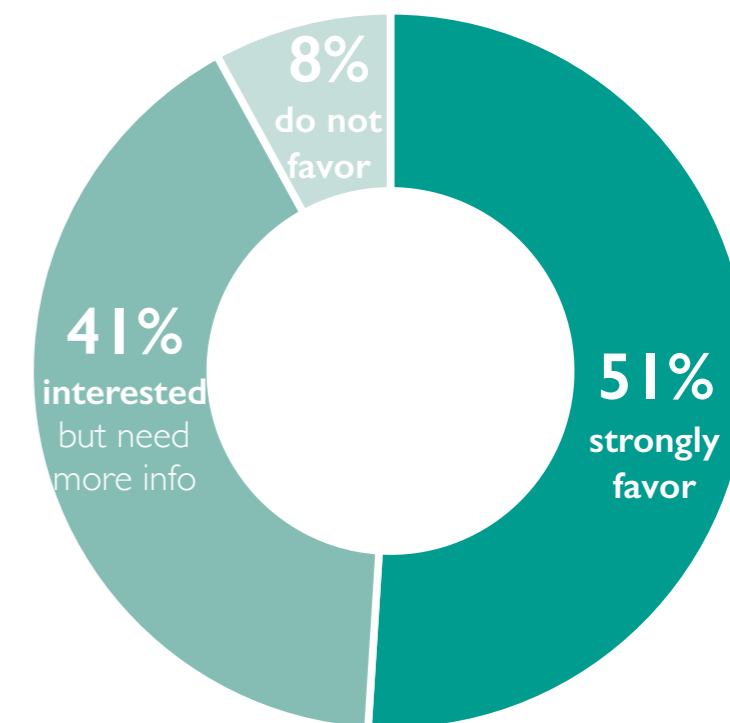
# SUPPORT FOR GBD?



- Strong support (over 50% in favor) & high response rate
- Strong support (over 50% in favor) & low response rate
- Low support (under 50% in favor) & low response rate

**51%** of survey respondents strongly favor the formation of a GBD, while only **8%** are against.

High levels of participation in the survey further indicate strong interest in a potential GBD.



CONCLUSIONS

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## KEY TAKEAWAYS

- Results from the Neighborhood Needs Survey demonstrate strong support for the formation of an Inner Sunset GBD.
- There is marked dissatisfaction with the current greenery, cleanliness, and traffic conditions across residential and commercial areas.
- Greening, enhanced cleaning and neighborhood advocacy were culled out as high priorities for a potential GBD across residential and commercial areas. In addition, residential respondents marked pedestrian safety, spot improvements to Golden Gate Park, and enhanced access to amenities as high priorities - whereas commercial respondents prioritized safety programs, parking management and promotion.
- Willingness to pay is strongest for an annual assessment range of \$150-\$500 among residential and commercial respondents.

## NEXT STEPS

Given the high level of support for a GBD in the Inner Sunset, Build Public recommends that the formation process move forward as follows:

- Share survey results with community members at Visioning Workshop (July 2017)
- Develop Vision Plan, documenting results from survey & workshop (August 2017)
- Develop Management Plan, informed by Vision Plan & public meetings, to outline the scope & authority of the proposed district (August-December 2017)
- Conduct district-wide petition (Spring 2018)
- City administers district-wide special ballot election to establish the GBD (July 2018)