



Section 5 – Survey Results

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Introduction

In order to complete the analysis, Rich and Associates, with the assistance and cooperation of the Town requested that employees, business owners/managers and customers/visitors to the businesses complete either on-line or hard copy surveys. These surveys were designed to provide important characteristics that were used in the parking demand analysis such as number of staff working, ratios of customers per day etc. These surveys also provided responses to several opinion questions for both customers/visitors coming downtown and staff working downtown.

Customers/Visitors

Customers/visitors to the various businesses around downtown were asked to respond to a brief survey that requested data such as how they come downtown, their purpose when coming downtown, length of stay and various opinion questions regarding downtown parking and operations. The survey was available for both on-line completion and with hard copies available at various establishments around downtown. One hundred and ninety customers/visitors responded to the surveys.

One of the questions asked of customers and visitors was how they come downtown. One hundred eighty-eight individuals responded to this question. As shown by **Figure I**, one hundred forty-six individuals indicated that they generally drive and park while 70 indicated that they walk. Seventeen individuals said that they ride a bicycle while seven said that they ride with a friend. Because of multiple responses (for example, an individual indicating that they generally drive and park **and** walk when coming downtown) the sum of the responses totals more than 188 respondents.

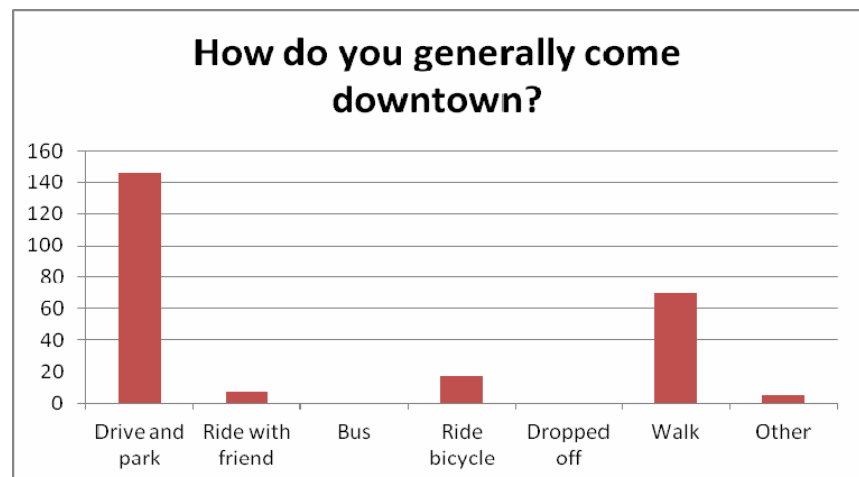


Figure I – Customer/Visitor Modal Split

Another question asked on the customer / visitor survey was the number of visits these individuals are making to downtown businesses during a typical week. As shown by **Table 25** and **Figure J** below, the average is 3.4 visits per week.

Table 25 - Customers /Visitors Response

If you are not an employee or business owner, how many times do you visit businesses downtown in a typical week?

Number of Visits	# Responses	# Visiits
0	2	0
1	17	17
2	40	80
3	45	135
4	31	124
5	23	115
6 or More	23	149
Total	181	620

Average Visits / Week **3.43**
(620 ÷ 181)



Figure J – Customer/Visitor Weekly Visits

In addition to the number of visits customers/visitors are making downtown, the survey also asked these individuals to rank the purpose of their visits on a scale of one to ten with one being most often. As visitors would rank these differently and not necessarily respond for all the choices, each choice was factored by the number of respondents who ranked it one, two, three and so on and the total divided by the number of respondents for that choice to derive an average score for each. The choices were then ranked in order of average score from lowest to highest as the choices with the lowest scores would be the most frequent reasons for coming downtown. The result of this question shows that shopping for goods is the primary reason for coming downtown followed by other services and dining. The shopping could, of course, be visits to Publix or Kosherland as opposed to some of the other retail destinations downtown. It should also be understood that as some new developments or expansions projected for the downtown are completed or new businesses open in existing vacant building space, the relative ranking of certain choices may change over time. The complete results of this question are shown in **Figure K** on the following page.

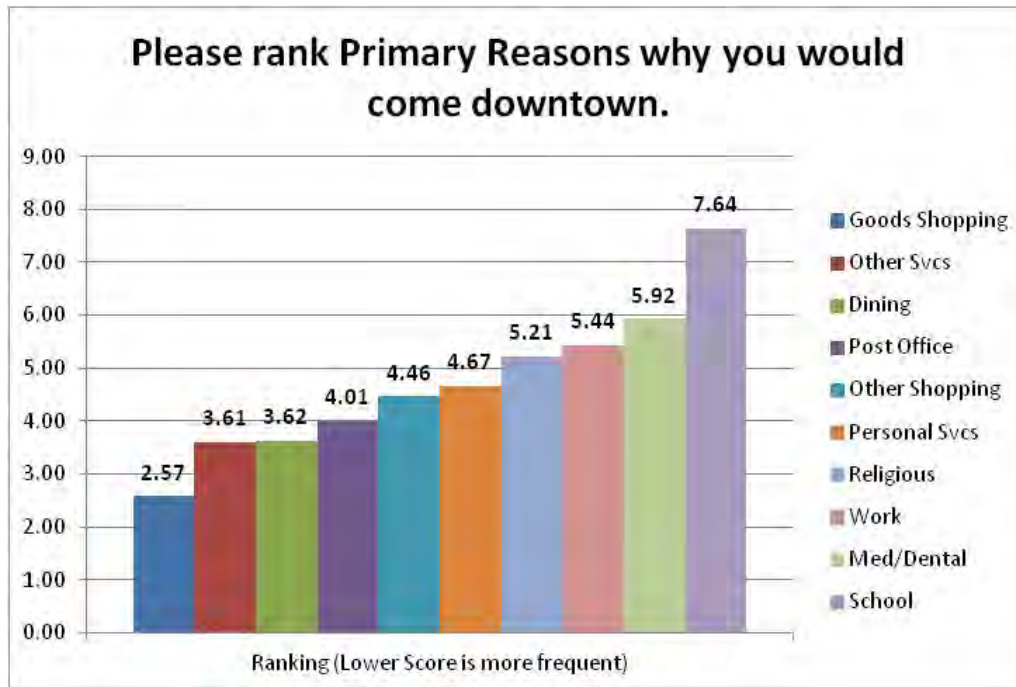


Figure K – Customer/Visitor Primary Purpose for Coming Downtown

In addition to the primary reason why someone may come downtown, respondents were asked to rank some “other” reasons why they may come downtown. This was calculated in the same manner as the primary reason question and had the responses as indicated by **Figure L** on the following page. It is important to understand that the results shown are compiled from the on-line survey which was available on the Town’s website during the first two weeks of September 2012. Therefore, it is not possible to separate these results to any specific day of the week such as the number of individuals going to the beach on weekends compared to, for example, coming downtown for recreation or exercise or entertainment on weekends or during the week.

However, one interesting point to make based on the results from this question was the individuals who responded “park to go to the beach”. Unlike individuals who may have responded with one of the other choices, where they would interact with a local business, those individuals who may have responded that they come simply for the beach and do not visit a local business as part of that trip, represent unquantified parking demand. This means that they are not included in the parking generation rate used in calculating parking needs which is based on visitors per one-thousand square feet of building use. There is no method that Rich and Associates is aware of to quantify the number of visitors to beach use.

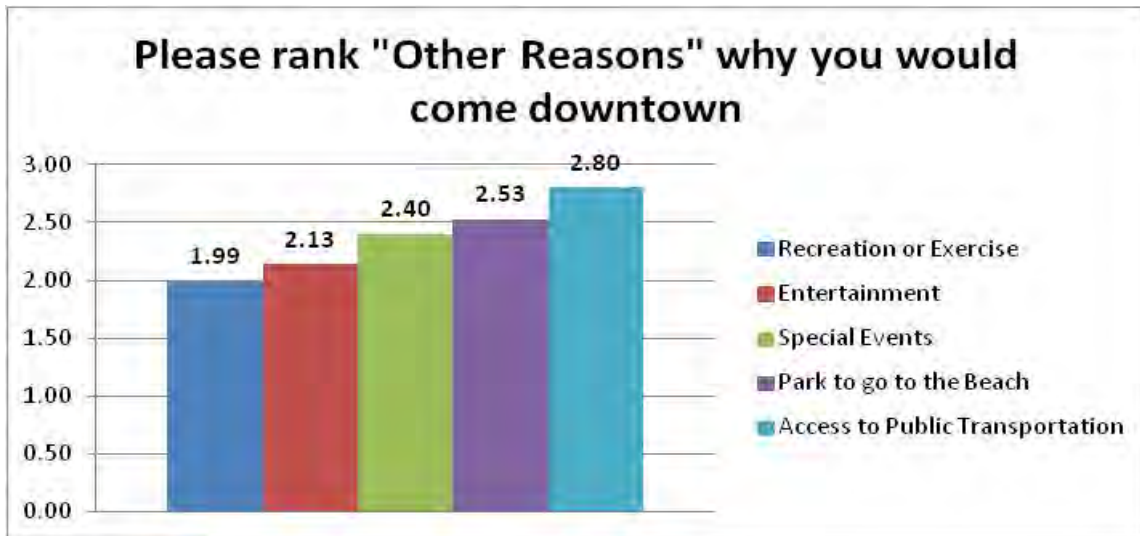


Figure L – Customer/Visitor Secondary Reasons for Visiting Downtown

Downtown customers and visitors were also asked how long their visits downtown generally lasted. This information as shown by **Table 26** and **Figure M** below had an average from the 189 respondents of 2 hours and 9 minutes. This length of stay is significantly longer than the calculated average stay based on the data from the downtown master meters which was only about 1 hour and 30 minutes. However, it is possible that all 15 individuals with responses of stays beyond four hours (and particularly the 10 of these respondents who indicated more than 8 hours) are downtown employees (and should not have answered this question). If these responses are excluded from the computation, the average length of stay calculates as 1 hour and 41 minutes which is a result much closer to the calculated average length of stay based on the transaction data as provided by the master meters.

Table 26 – Length of Stay Summary

Length of Stay	Pct	Responses
Less than 1 hour	34%	64
1 to 2 Hours	44%	84
2 to 3 Hours	14%	26
3 to 4 Hours	0%	0
4 to 5 Hours	2%	4
5 to 6 Hours	0%	0
6 to 7 Hours	0%	0
7 to 8 Hours	1%	1
More than 8 Hours	5%	10
Total		189
Average Length of Stay (Hrs:Min)		2:9

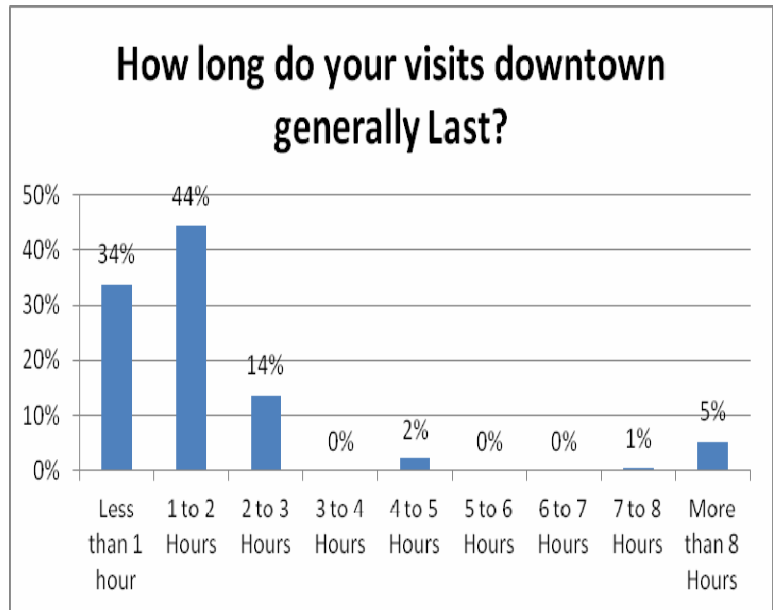


Figure M – Customer/Visitor Length of Stay

Downtown customers and visitors were also asked their opinion as to what the time limits should be for parking on downtown streets. The current limit is four hours but as Rich and Associates noted previously on page 2-12, on-street parking is typically limited to two hours in other jurisdictions.

The question was asked “What do you think should be the time limit for parking on-street?” Individuals were to respond with “at least” and no more than. Individuals responded differently for what the minimum and maximums should be. These responses are then grouped by the minimum number. For example, the first set of bars in **Table 27** on **page 5-7** shows a total of 20 individuals responded with on-street parking should be “at least 30 minutes”. One person indicated only 30 minutes which was taken as their opinion for the maximum for on-street parking. Four individuals responded that on-street parking should be a minimum of 30 minutes and a maximum of one hour. One person responded with a minimum of 30 minutes and a maximum of 90 minutes (1 ½ hours). There were eight more respondents who thought on-street parking should be a minimum of 30 minutes but it should be no more than 2 hours while one person thought a maximum of 3 hours was sufficient with the 30-minute minimum. Finally, five individuals thought it should be a minimum of 30 minutes with the existing 4 hour maximum. These individuals are all saying or stating that any on-street parking downtown should allow at least 30-minutes of parking up to various maximums.

Alternatively, there were another 20 individuals who thought that the Town should not reduce the time limit for on-street parking to anything less than one hour. Ten of these 20 respondents felt that so long as the Town permitted at least one hour of on-street parking, two hours should be sufficient for the maximum allowed.

The largest group responding to this question was 39 individuals who felt that on-street parking should not be limited to anything less than two hours. Twenty-eight of these 39 respondents had the opinion that three hours would be sufficient for the maximum length of stay permitted in on-street spaces. The balance of 11 individuals who felt that two hours should be the minimum felt that the current maximum of four hours is sufficient.

Analyzing this information in the context of the potential to reduce on-street parking to a maximum of two hours in conjunction with developing one or more parking structures downtown gives an interesting result. Fifty-three (53) individuals feel that a maximum of two hours is sufficient for the on-street parking, while 53 others feel that the time limit should be more than two hours.

The minimum and maximum on-street parking limits suggested by some members of the community is also interesting if considered in the context of the consideration to eliminate the on-street parking along Harding altogether (in conjunction with developing one or more parking structures to service the downtown). If implemented, the intent of eliminating the on-street parking as part of streetscape improvements would be to have wider sidewalks which are more pedestrian friendly and may allow more restaurants to have outdoor dining. Of course, such a change would be subject to a financial review and the impact on perceptions of convenient parking downtown.

Table 27- Opinion On-Street Time Limits

		To					
Minimum of 30 Minutes	1 Hour	1 1/2 hrs	2 Hrs	2 1/2 Hours	3 Hrs	4 Hrs	
1							
4							
1							
8							
1							
5							
		To					
30 Minutes	Minimum of 1 Hour	1 1/2 hrs	2 Hrs	2 1/2 Hours	3 Hrs	4 Hrs	
2							
10							
1							
3							
4							
		To					
30 Minutes	1 Hour	Minimum of 1 1/2 hrs	2 Hrs	2 1/2 Hours	3 Hrs	4 Hrs	
4							
3							
1							
		To					
30 Minutes	1 Hour	1 1/2 hrs	Minimum of 2 Hrs	2 1/2 Hours	3 Hrs	4 Hrs	
20							
8							
11							
		To					
30 Minutes	1 Hour	1 1/2 hrs	2 Hrs	Minimum of 2 1/2 Hours	3 Hrs	4 Hrs	
1							
		To					
30 Minutes	1 Hour	1 1/2 hrs	2 Hrs	2 1/2 Hours	Minimum of 3 Hrs	4 Hrs	
5							
4							
		To					
30 Minutes	1 Hour	1 1/2 hrs	2 Hrs	2 1/2 Hours	3 Hrs	Minimum of 4 Hrs	
9							

In addition to the time limit for on-street parking, Visitors/Customers respondents were also asked their opinion for what they felt the hourly rate for on-street parking should be. The majority of the respondents (63%) felt that the current rates are sufficient with about 20 percent of the responses suggesting rates that are higher than the current rates for on-street parking with 18 percent suggesting either free parking or parking rates that are lower than current rates should be implemented for the on-street spaces. *One caveat of this question is that it was not asked in the context of having additional parking developed in one or more parking structures.*

Table 28 - Opinion – On-street Parking Rates

On-Street Parking Should cost			
No Response	3		
Free or Free for Residents	2	}	18%
\$0.50 / Hour	3		
\$1.00 / Hour	19		
\$1.25 / Hour (Current Rate)	85		62%
\$1.50 / Hour	16	}	20%
\$1.75 / Hour	8		
\$2.00 / Hour	2		
\$3.00 / Hour	1		
\$11.00 / Hour	1		
Total	137		



Figure N – Customer/Visitor Opinion of On-Street Parking Rates

Visitors/Customers respondents were also asked their opinion regarding rates for off-street parking. As shown below, only 19 percent felt that the current parking rates are appropriate. Nearly 20 percent felt that higher rates are appropriate and 61 percent felt that lower rates than currently charged would be appropriate. Comparing these opinions to results from three previous studies performed by Rich and Associates for other jurisdictions where similar questions were asked, similar results were obtained with the largest percentage tending to feel that lower rates would be more appropriate. The percentage of respondents that feel that existing rates were proper ranged from 14 percent to 24 percent in the other studies analyzed which puts the results obtained in Surfside right in the middle. The 20 percent of respondents in Surfside who felt that higher rates for off-street parking would be appropriate significantly exceeded the responses from the other studies compared which ranged from a low of 1.5 percent of the respondents to a high of 12 percent of the respondents.

Table 29- Opinion – Off-street Parking Rates

Off-Street Parking Should cost		
First 30 Minutes Free	1	} 61%
Free or Free for Residents	4	
\$0.50 / Hour	4	
\$1.00 / Hour	75	
\$1.25 / Hour (Current Rate)	26	} 19%
\$1.50 / Hour	11	
\$1.75 / Hour	10	} 20%
\$2.00 / Hour	4	
\$3.00 / Hour	2	
Total	137	

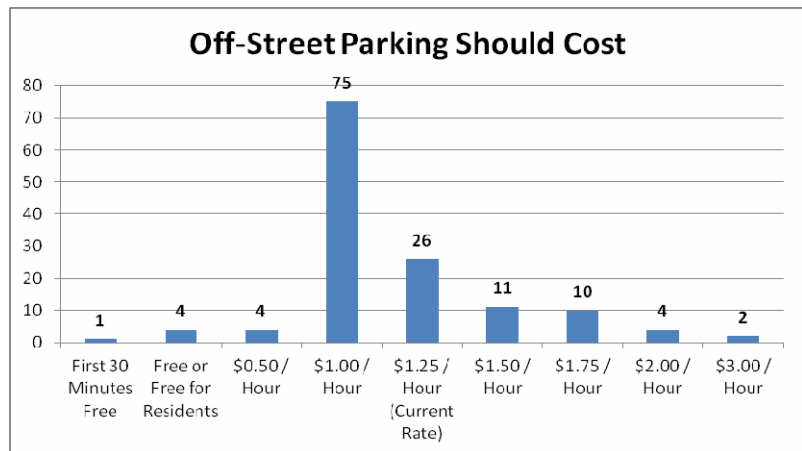


Figure O – Customer/Visitor Opinion of Off-Street Parking Rates

Visitors/Customer respondents were also asked to respond to a series of opinion questions as to whether they:

Strongly Disagree	-2
Disagree	-1
Neither Agree nor Disagree	0
Agree	+1
Strongly Agree	+2

For these questions, each of the responses was weighted as noted above to derive an average score for the question.

For the statement “It is easy to locate a parking space downtown”, the respondents tended to agree with statement with an average score of plus 0.43. Of the 187 responses, 28 percent disagreed or strongly disagreed with the statement while 57 percent agreed or strongly agreed with the statement. Fifteen percent neither agreed nor disagreed.

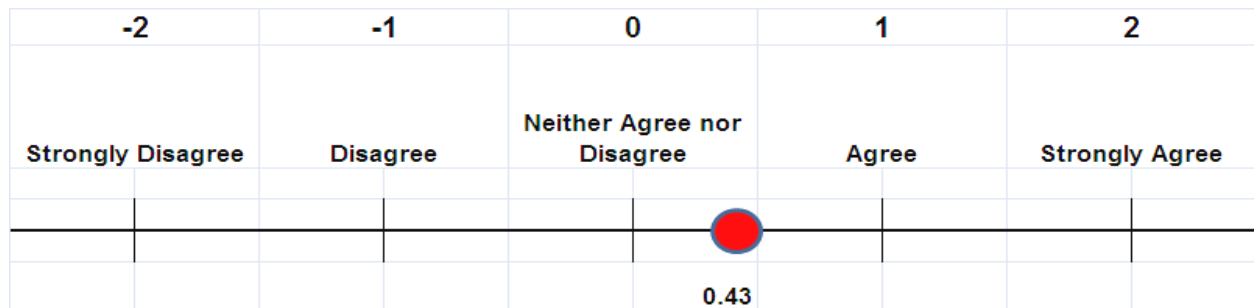


Figure P – Opinion - Agree/Disagree – It is easy to locate a parking space downtown.

Patrons also tended to agree with the statement that “Parking signage (directional, length of stay etc) is easy to follow and understand” with an average score of 0.40. In this case, of the 186 respondents, 20 percent either disagreed or strongly disagreed with the statement while 54 percent agreed or strongly agreed and 26 percent neither agreeing nor disagreeing with the statement. *It should be noted that patrons were not asked about the aesthetics of the existing signs but only with the information that they were intended to convey. It should be further noted that the new parking signs were not installed at the time of the survey.*

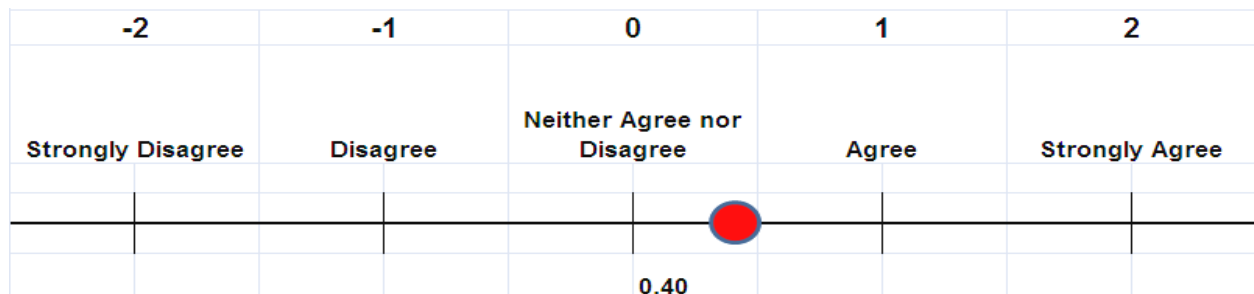


Figure Q – Opinion - Agree/Disagree – Parking signage (directional, length of stay, etc.) is easy to follow and understand.

Downtown patrons only marginally agreed with the statement “There is enough public parking in the downtown at all times”. Here based on 189 responses, the average score was just slightly on the agree side with an average score of 0.11. Forty one percent either disagreed or strongly disagreed with the statement while just under 46 percent agreed or strongly agreed.

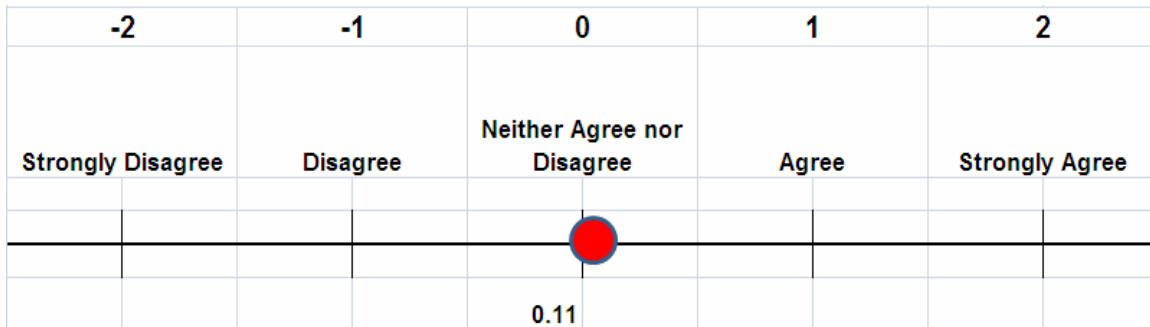


Figure R – Opinion – Agree/Disagree – There is enough public parking in the downtown at all times.

Patrons felt that the on-street time limits gave them sufficient time to complete their trips. The majority of responses (63 percent) agreed or strongly agreed with the statement “The on-street parking time limitations generally give me enough time to complete my trip” with an average score of 0.61. Only fifteen percent of the 179 respondents disagreed or strongly disagreed.

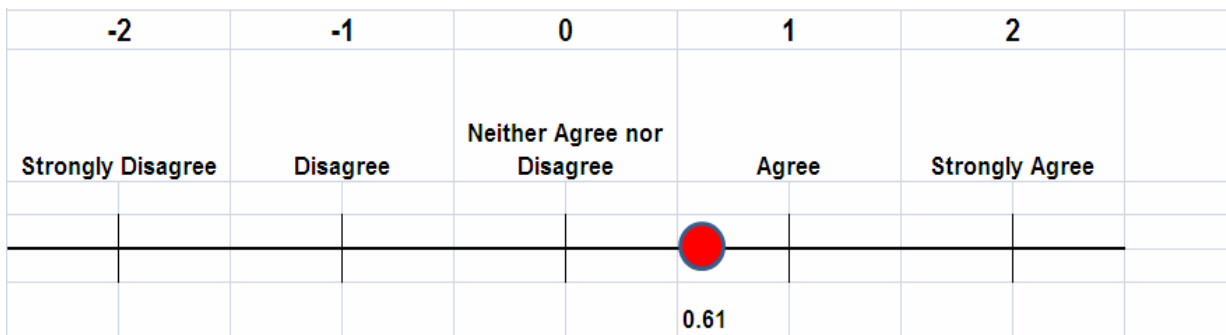


Figure S – Opinion – Agree/Disagree – The on-street parking time restrictions generally give me enough time to complete my trip.

Finally, to the statement “Parking Enforcement is Consistent”, patrons tended to agree with this statement with an average score of 0.52. Fourteen percent of the 184 responses either disagreed or strongly disagreed while 54 percent agreed or strongly agreed. Nearly one-third (32 percent) neither agreed nor disagreed.

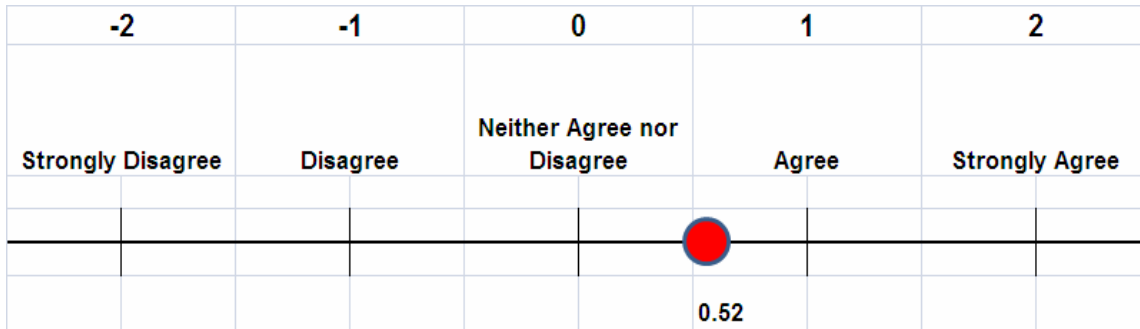


Figure T – Opinion – Agree/Disagree – Parking enforcement is consistent.

Business District Employees

Employees of the various businesses in downtown Surfside were also asked to respond to a brief survey. This survey requested information on their employment status (full-time versus part-time), employment classification, method of transportation when coming to work, parking location and proximity to workplace and opinions on several questions.

Of the 102 individuals who responded to the question on their employment status (full-time versus part-time), 81 percent were full-time employees. Twenty-five percent of the 83 full-time respondents classified themselves as food services/restaurant staff. Twenty-five percent classified themselves as working in financial services while 23 percent worked for personal service establishments. Seventeen percent were in retail sales.

Employment Classification (Pick the option that best describes your job function)

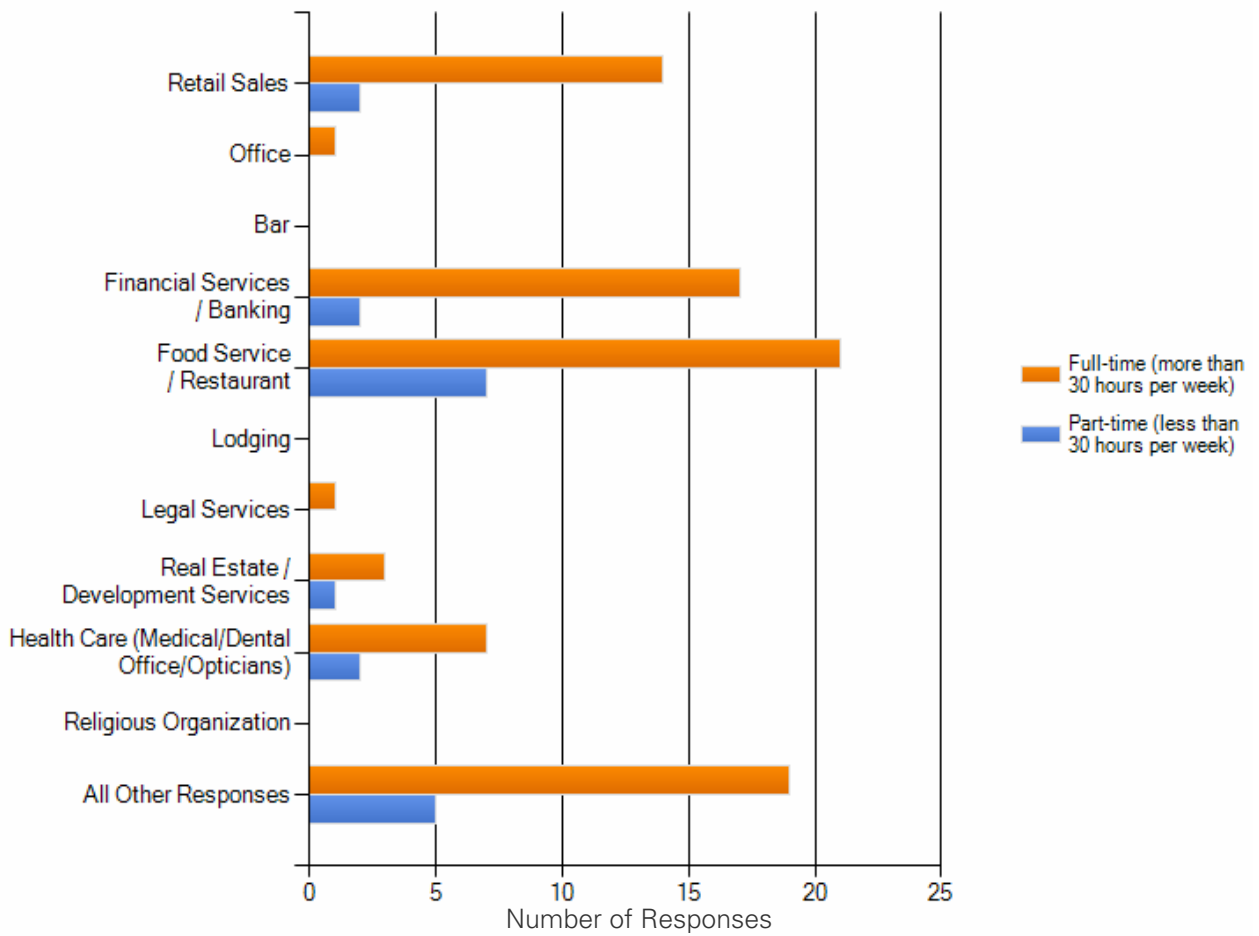


Figure U – Downtown Employees – Employment Classifications

Of the 101 downtown employees who responded to the question “How do you generally come to work?” 86 percent indicated that they generally drive and park when coming to work while 9 percent use public transportation and five percent either walks or rides a bicycle to work.

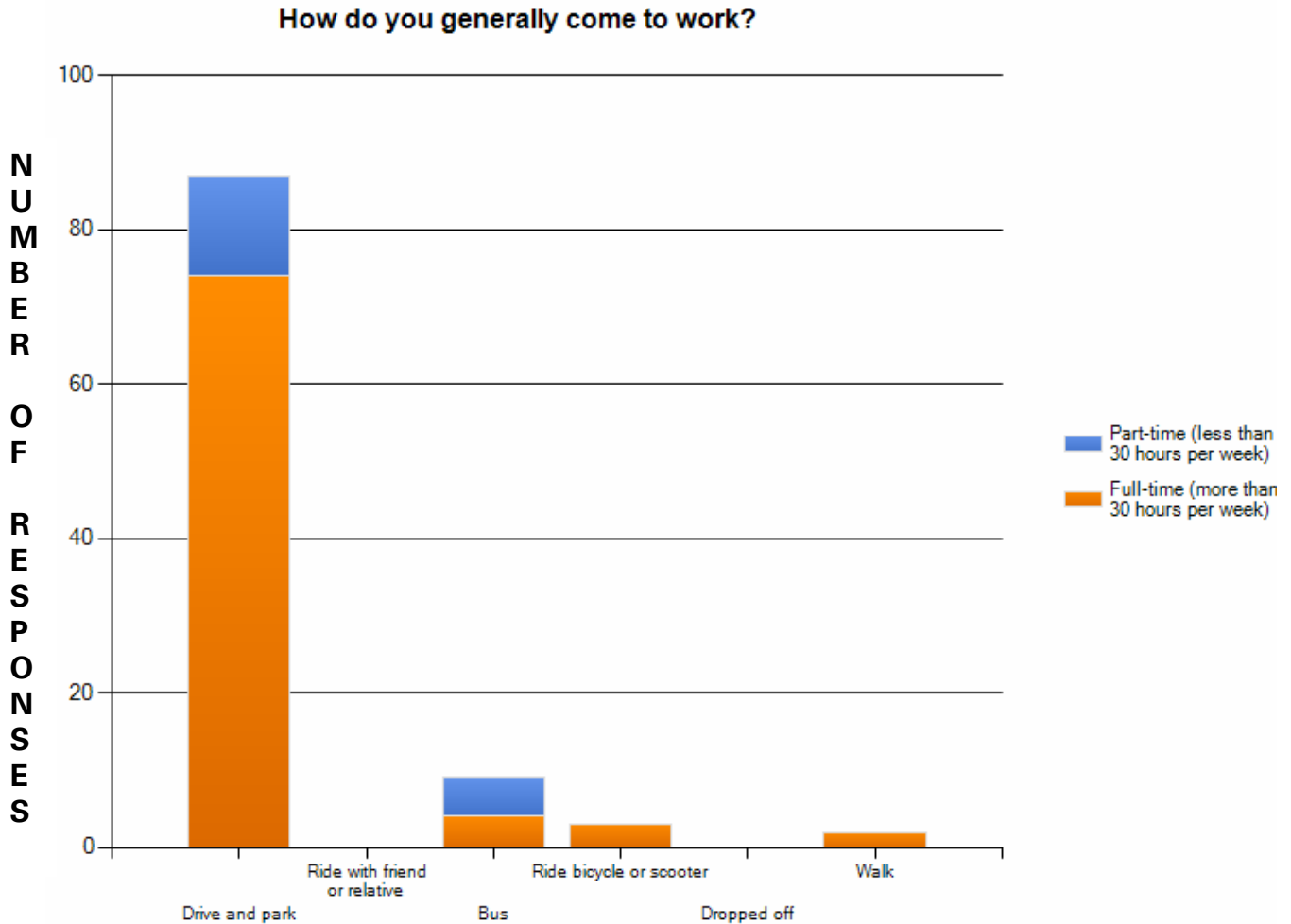


Figure V – Downtown Employees – Modal Split

With the limited access to private parking available in downtown Surfside, it isn't surprising that three quarters (74%) of the 89 respondents to the question "If you drive when you come to work, where do you usually park?" are parking in publicly provided parking. This is consistent with Rich and Associates' earlier statement and conclusion that few businesses, even if they may have some parking associated with their business, will have enough parking for all their needs. However, because the question did not ask the employee respondent for the name of their specific employer, it is not possible to relate what employees from what businesses are or may be using public parking spaces. However, data provided by the Town indicated that Publix was recently purchasing from 20 monthly permits to as many as 60 permits per month for their staff to park in the 94th Street Lot. They have since discontinued this practice of purchasing permits for their staff.

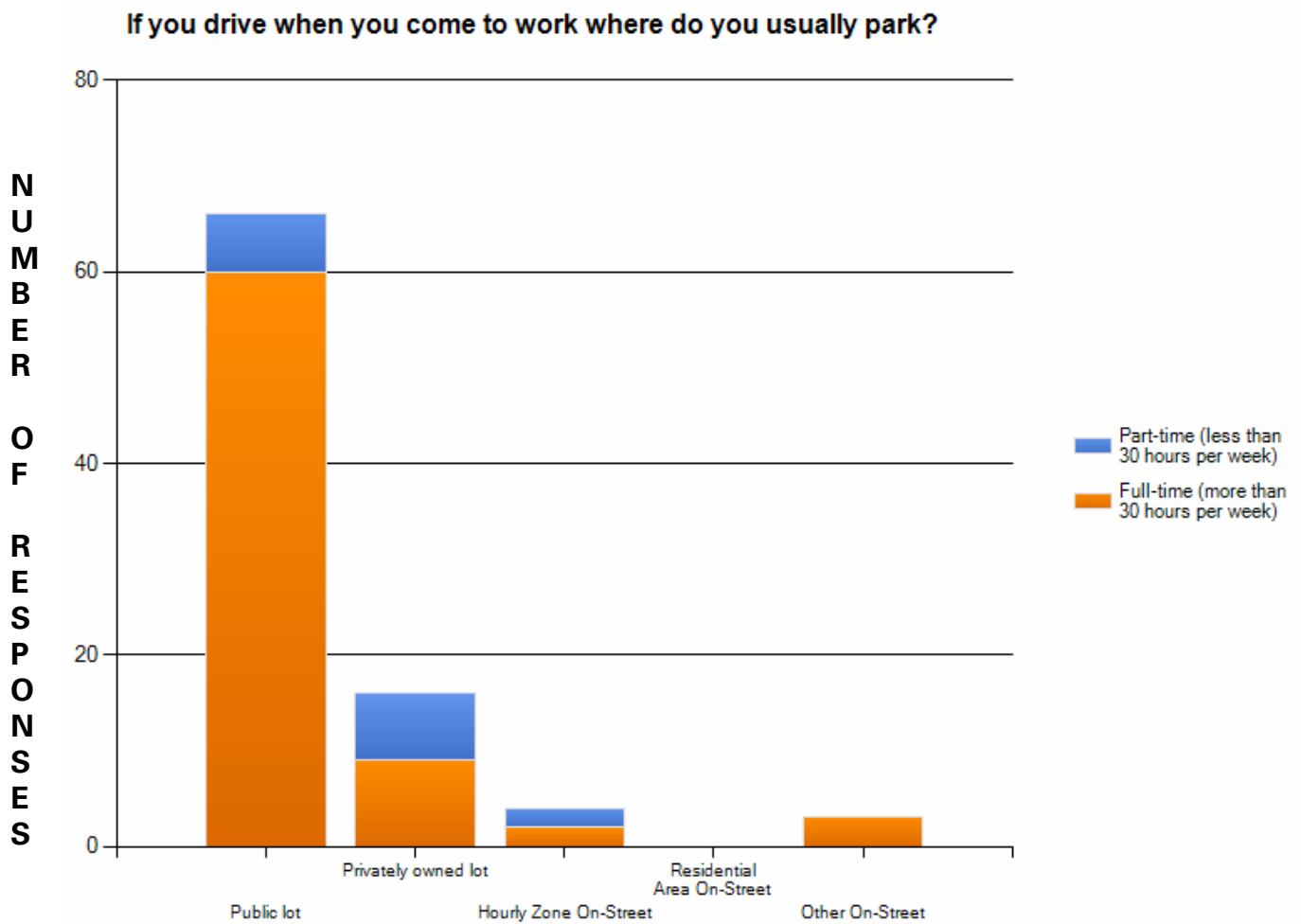


Figure W – Downtown Employees – Parking Locations

Ninety-seven employees answered the question “How far do you generally walk from your parking location to your workplace?” More than one-half (53%) walk 100 feet or less while forty percent are walking at least one block to more than two blocks.

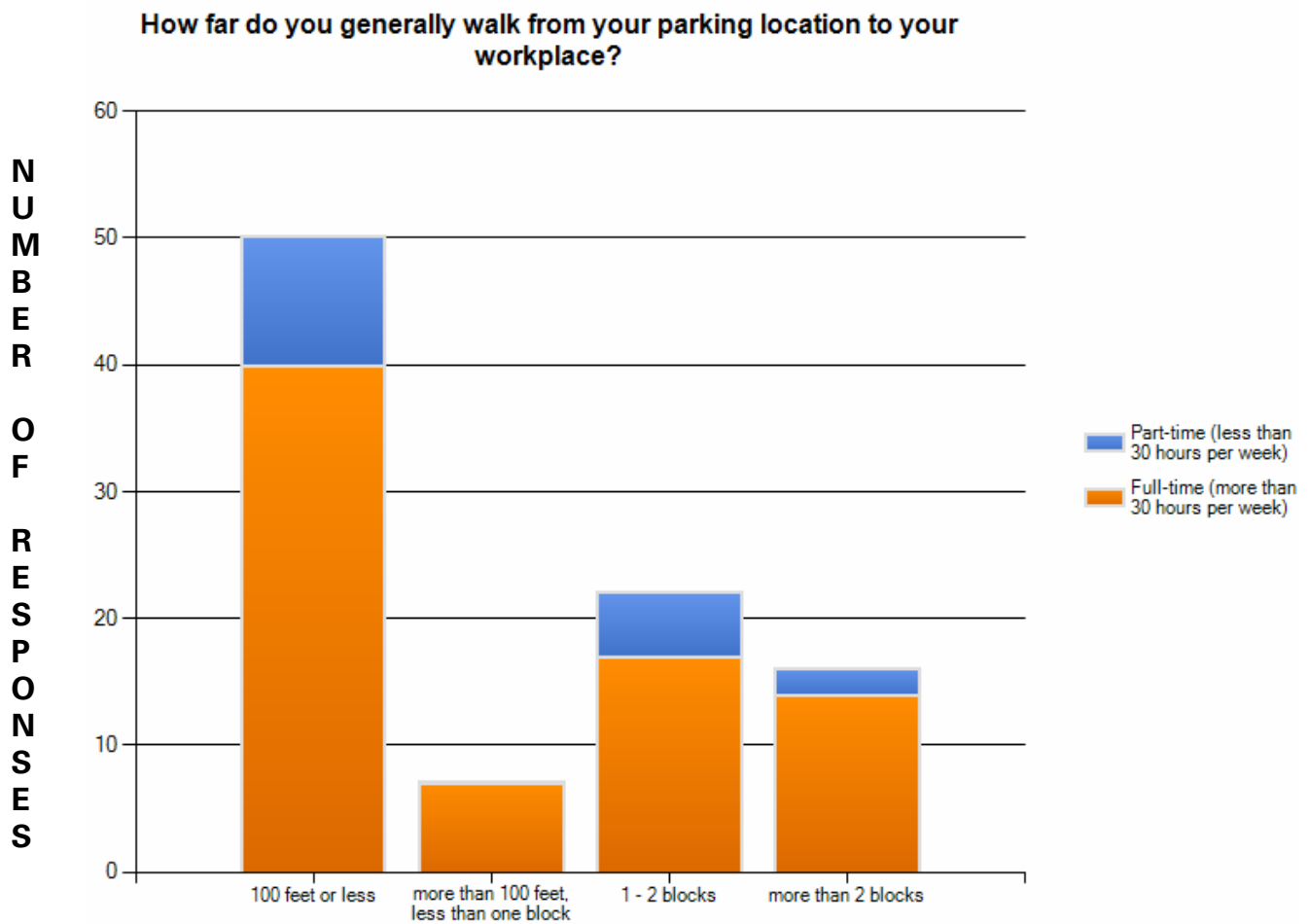


Figure X – Downtown Employees – Actual Walking Distance Parking to Workplace.

The question “How far are you willing to walk, particularly if less expensive?” must be considered carefully. Much of the available parking is publicly provided and rates are uniform at \$1.25 per hour. As such, there are few locations with “less expensive” parking. The only option would be if someone were to purchase a business permit for parking in the 94th Street lot or Post Office lot. At the time of the fieldwork permits cost \$69.55 per month. Assuming a full-time employee working 22 days per month and eight hours per day, the hourly cost is about \$0.40 per hour. For a part-time employee working, for example, 12 days per month and eight hours per day the hourly cost for the permit would be about \$0.72 per hour. Some employees may have considered the question in the context of parking at 94th Street lot or the Post Office lot because of the permit availability and lower rate and working other locations within the downtown whereas others may have simply interpreted the question, “How far are you willing to walk?”

With this caveat, in terms of walking distance, employees were almost evenly split with 47 percent not willing to walk more than one block while 52 percent would walk from 1 to 2 blocks. Seven percent were willing to walk from 100 feet to one block.

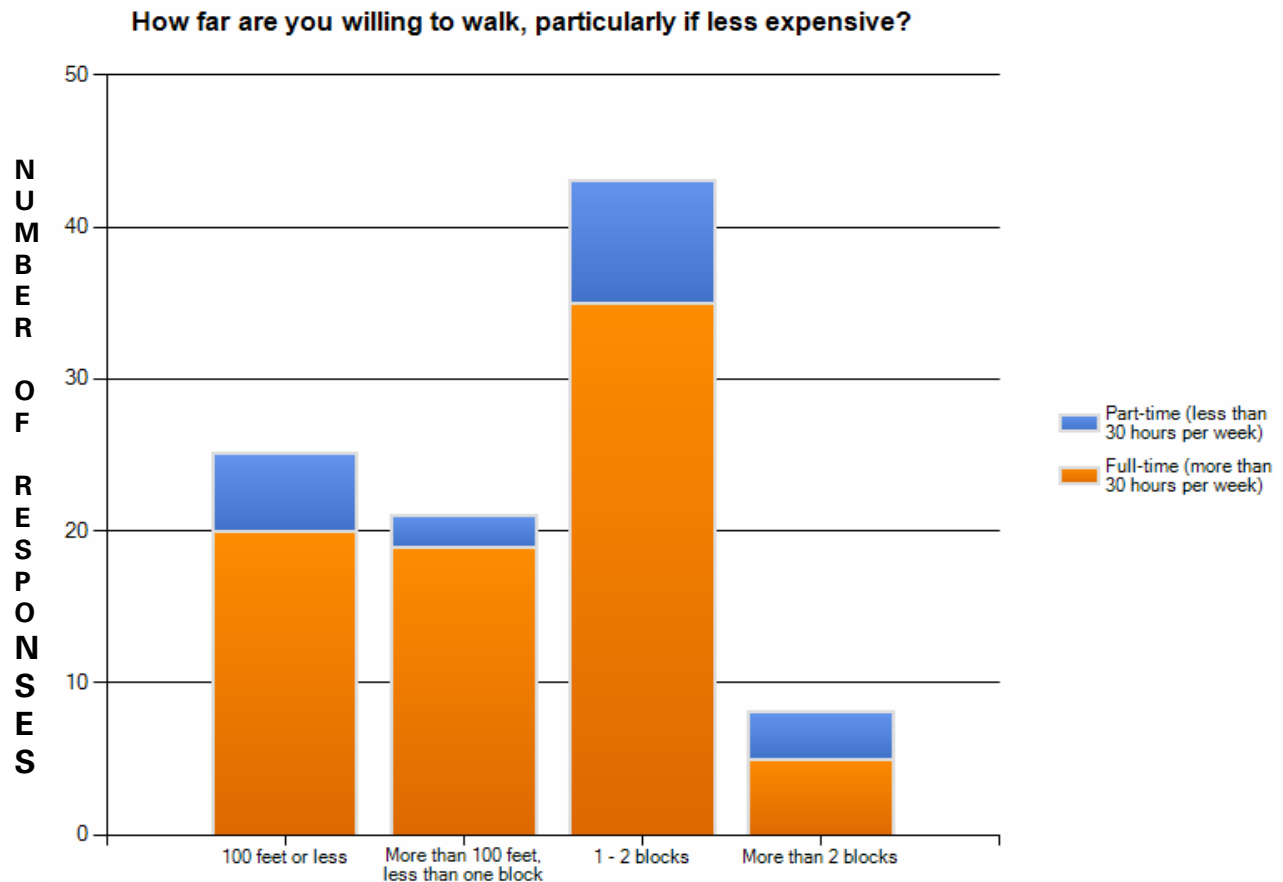


Figure Y – Downtown Employees – Distance Willing to Walk.

Just as with the customers/visitors, downtown employees were asked to provide their opinion on several statements with whether they agreed or disagreed with the statement. As with the customers/visitors questions, the responses for agree and disagree were weighted so that an average score of each statement could be determined.

Employees tended to disagree with the statement “There is an adequate number of parking spaces for employees” with an average score of negative 0.47. Of the 97 employees that responded, 45 percent disagreed or strongly disagreed while 39 percent agreed or strongly agreed. Fifteen persons neither agreed nor disagreed.

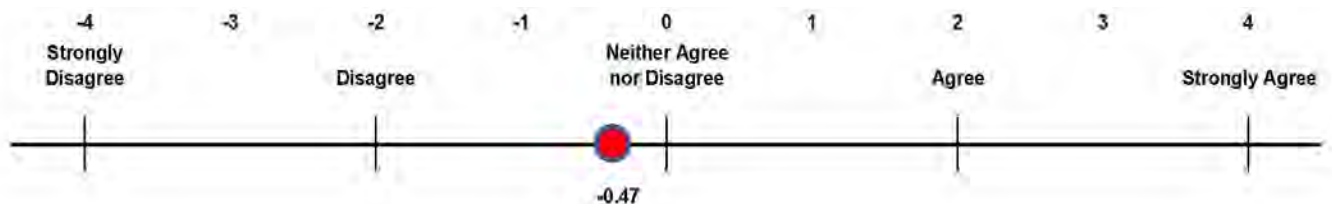


Figure Z – Downtown Employee Opinion – Agree/Disagree – There are an adequate number of parking spaces for employees.

Employees also disagreed with the statement that “There is an adequate number of parking spaces for customers”. Here based on 98 responses the average score was negative 0.96. Fifty one percent disagreed or strongly disagreed with the statement while only 32 percent agreed or strongly agreed.

Employees also tended to disagree in the same proportion to the statements “There are an adequate number of parking spaces for residents” and “There are an adequate number of parking spaces for visitors”.

Employees however did tend to agree with the statement “The parking is reasonably close to my work place” with an average score of 0.73 based on 99 responses. In this case, 28 percent disagreed or strongly disagreed with the statement while more than half (51%) either agreed or strongly agreed with it.

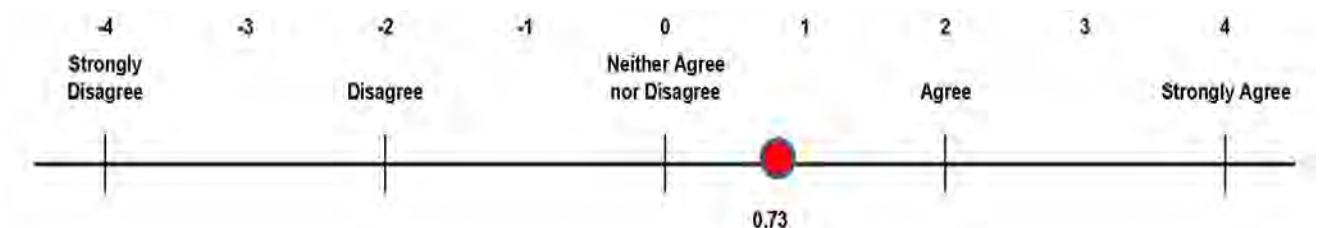


Figure AA – Downtown Employee Opinion – Agree/Disagree – The parking is reasonably close to my work place.