



Parking Lot Districts (PLDs) FY16 Customer Satisfaction Survey

Department of Transportation (DOT)
Parking Management Division

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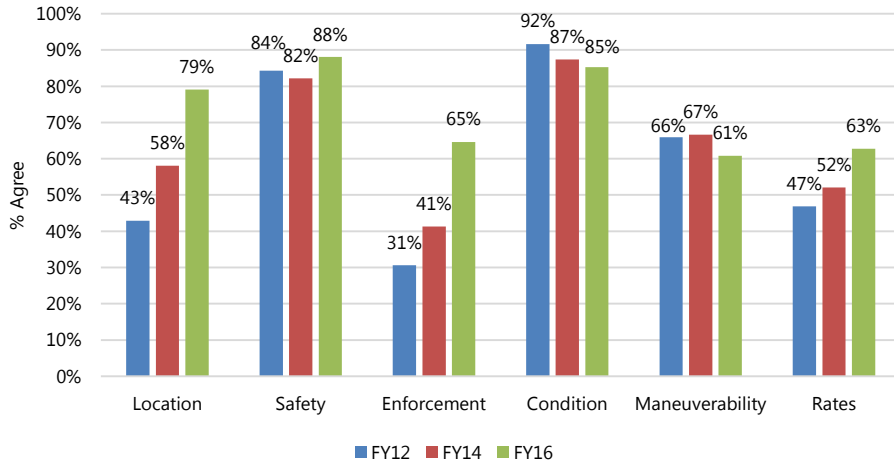
- **Purpose:** Gauge the current performance of the public parking system from the customers' perspective
- **Audience:** Permit Holders, Visitor/Transient Parkers, Business Owners
 - A breakdown of audience by year is on pages **16 and 30**
- **Survey Period:**
 - **Parkers:** Weekdays from 7AM-12PM and 3PM-7PM for the weeks of 12/7 and 12/14 2015.
 - **Businesses:** Weekdays from 11AM-7PM for the weeks of 1/11 and 1/18 2016
- **Methodology:** Similar to prior years, contractor personnel circulated through each parking district and each block during the time periods listed above during a typical weekday in an effort to meet and interview a representative sample of permit/visitor parkers and business owners/managers.

FY16 DOT Parking Survey General Findings (1/2)

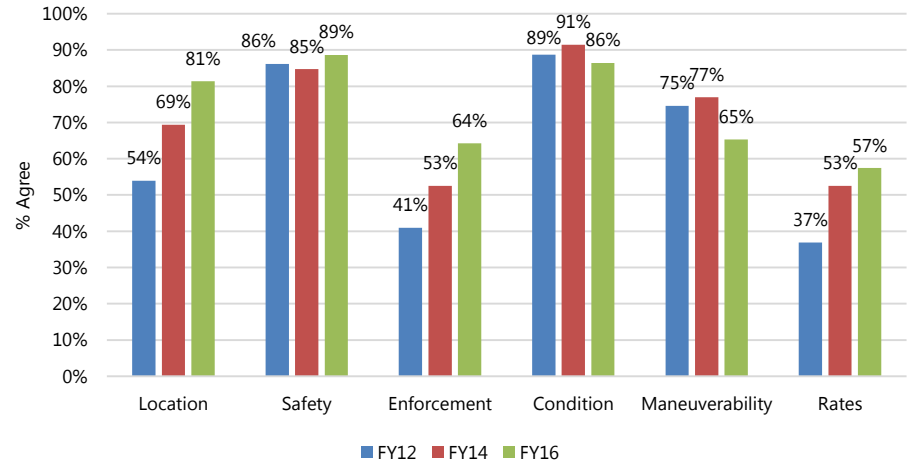
Business Survey

- Across all Parking Lot Districts (PLDs), businesses had **highest satisfaction with the safety and condition** of customer and employee parking facilities. These two areas of the survey were also the highest ranking for the FY12 and FY14 surveys. A breakdown of scores by year and by PLD begins at page 11.
- Perceptions of fair enforcement and parking rates remained the two lowest areas of the survey, but improved from previous surveys.
- Businesses reported their busiest day to be Saturday across all PLDs.

Business Ratings for Customer Parking – All Districts

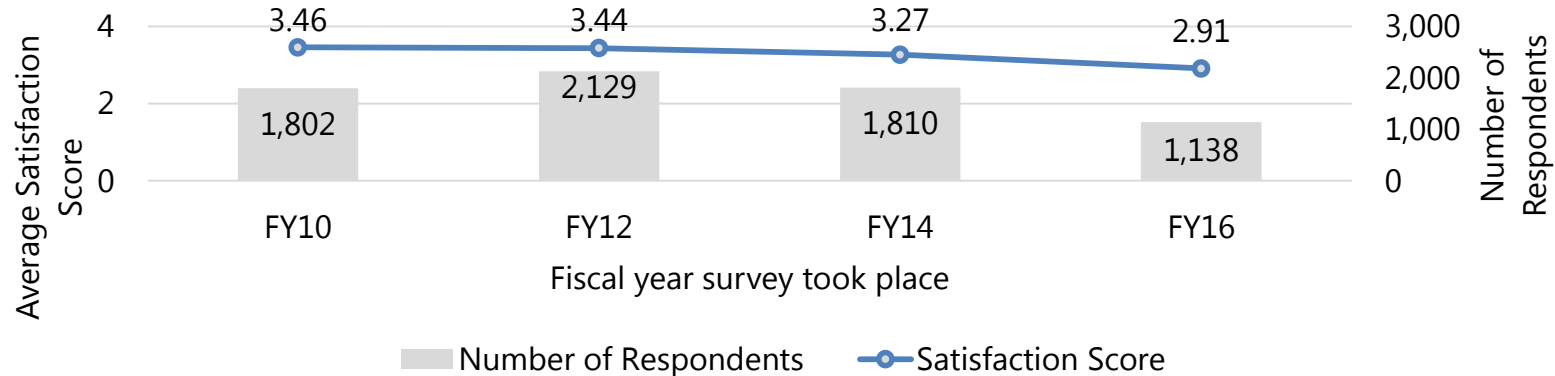


Business Ratings for Employee Parking – All Districts



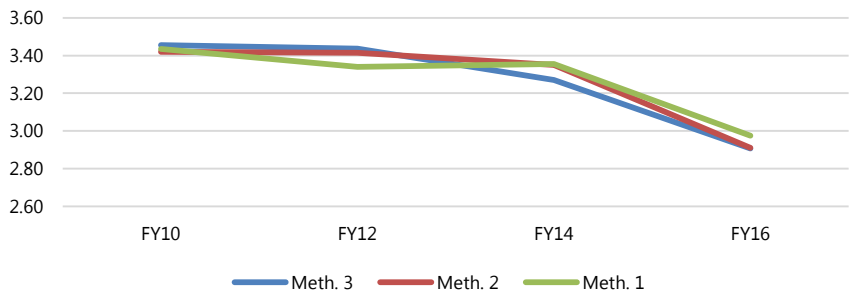
Pedestrian Survey

- Overall satisfaction for the Parking Lot Districts (PLDs) **dropped 11%** from 3.27 in FY14 to 2.91 in FY16. The FY16 results were the lowest since the survey began in FY10.
- There were some differences with the administration of the FY16 survey. Whether or not these changes affected the final results was unclear.
 - The FY16 survey was conducted in December whereas previous surveys were completed in October or November.
 - The sample size for FY16 was also the smallest recorded and 47% smaller than the FY12 sample.
- For facilities that were surveyed in FY14 and FY16:
 - Permit parkers: 13 total facilities – 1 improved, 4 were steady, and 8 declined
 - Visitor parkers: 6 total facilities – 2 improved and 4 declined



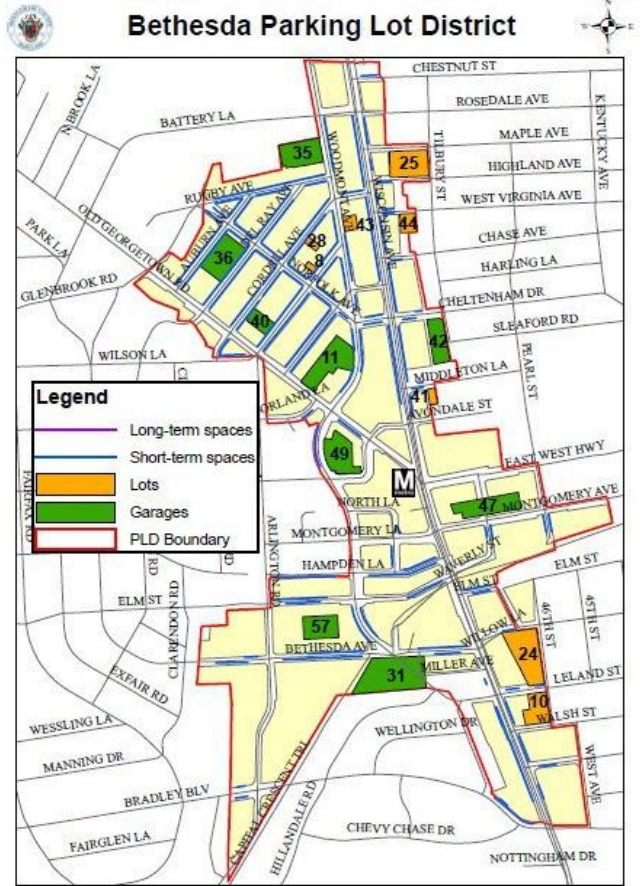
Note on Prior Years' Scores for Pedestrian Survey

- CountyStat reviewed the methodologies used to calculate average scores for the pedestrian survey each year. During this review, it was determined that slightly different methodologies were used to calculate average scores. The differences were as follows:
 - **FY10:** Overall average for permit and visitors was calculated by averaging the overall score for each parking facility regardless of sample size for the facility.
 - **FY12:** Overall average calculated by averaging the overall score for only the parking facilities that had ≥ 15 responses.
 - **FY14:** Overall average calculated using each pedestrian response regardless of facility and the number of responses for each facility.
- While the methodologies produced slightly different averages, ***the overall trends are the same regardless of methodology*** as can be seen in the chart and table below.
- To avoid mixing methodologies, CountyStat reprocessed and analyzed prior survey data to ensure consistency. Therefore, the FY10 and FY12 data in this report will not completely match prior reports.

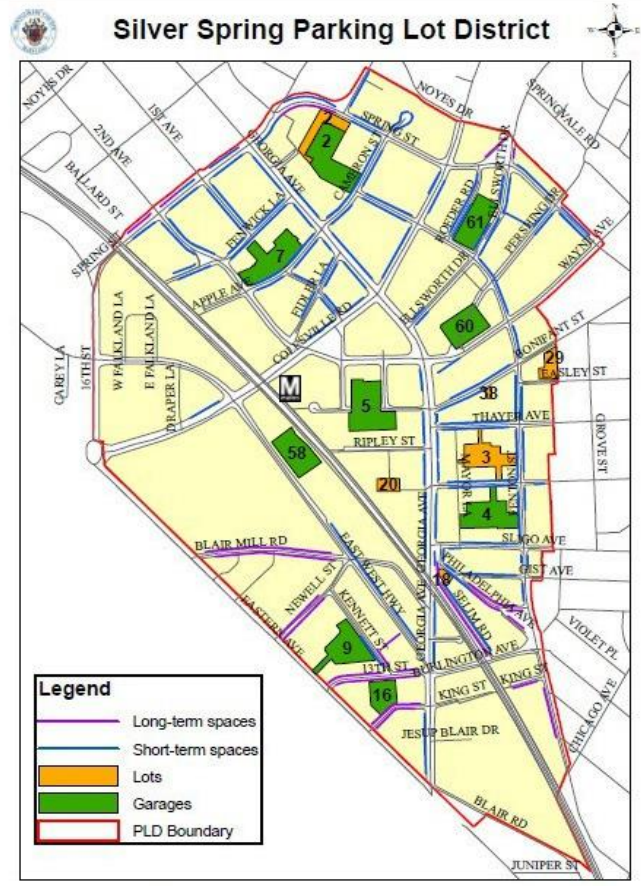


Survey Year	Methodology 1 (FY10)	Methodology 2 (FY12)	Methodology 3 (FY14)
FY10	3.44	3.42	3.46
FY12	3.34	3.42	3.44
FY14	3.36	3.35	3.27
FY16	2.98	2.91	2.91

Parking District Maps – Bethesda and Silver Spring

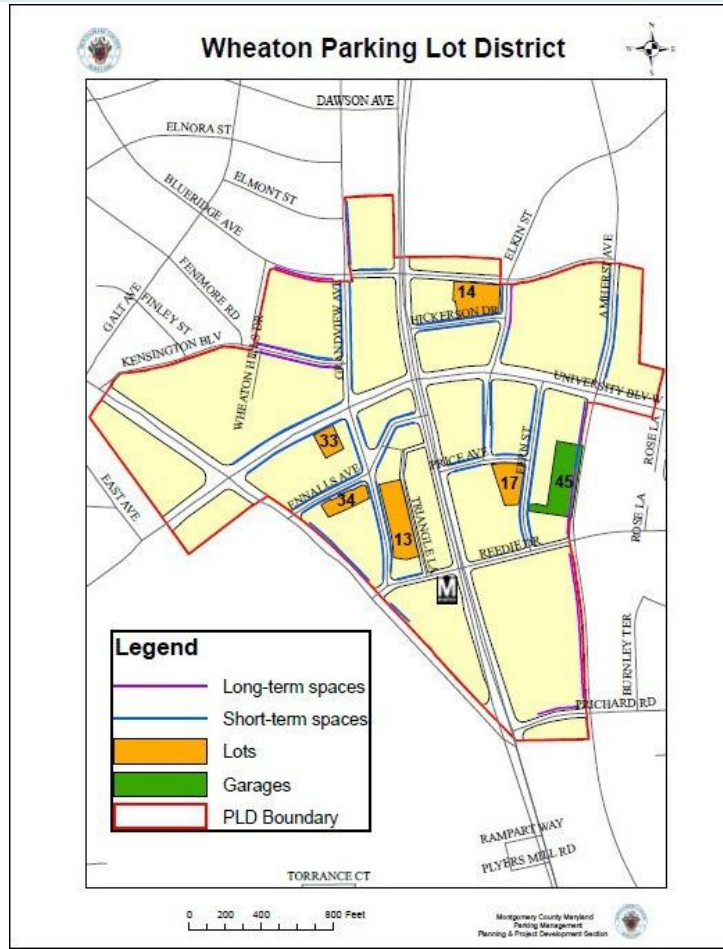
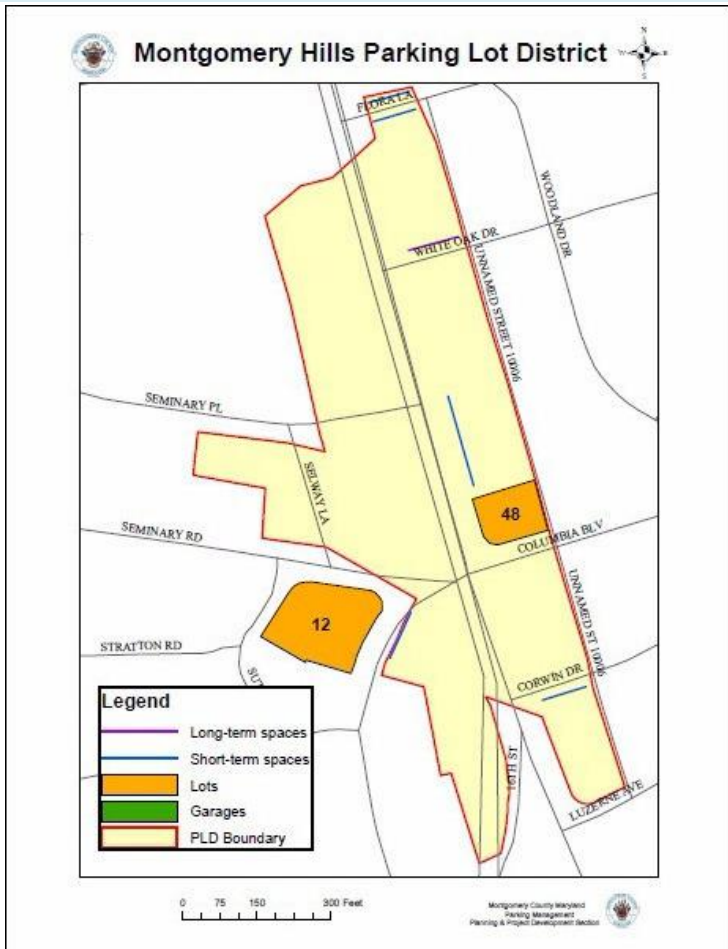


0 295 590 1,180 Feet



0 305 610 1,220 Feet

Parking District Maps – Montgomery Hills and Wheaton



FY16 DOT Parking Survey Questionnaire

Pedestrian Questionnaire

Business Questionnaire

POINT OF ACCESS QUESTIONNAIRE LOCATION _____

"Excuse me sir/madam, I'm doing a survey for the Montgomery County. May I ask you 10 quick questions regarding your visit here today?" SURVEYOR'S NAME _____

WHAT IS THE PURPOSE OF YOUR VISIT?	Unless otherwise noted please rate each question using the following scale: 1. Poor 2. Fair 3. Good 4. Excellent 5. No Opinion																		
	Employee/Permit Holder					Visitor/Transient Parking													
Employee	Visitor	Availability of parking?	Ease of navigation/maneuverability?	Condition of facility (clean, well lit, way findings)?	Feeling of safety and security?	Convenience to destination?	Ease of signing up for a monthly permit?	Cost of parking?	How do you purchase/renew your parking permit (walk-in, mail, or both)?	How many blocks is it to your final destination? (1, 2, 3 or 4)	Availability of parking?	Ease of navigation/maneuverability?	Condition of facility (clean, well lit, way findings, informational signage)?	Feeling of safety and security?	Convenience to destination?	Ease of paying you parking fee?	Cost of parking?	How long will your visit be today (< 1 hour, 1-2, 2-3, 3-4, or > 4 hours)	How many blocks is it to your initial destination? (1, 2, 3 or >4)

Business Parking Customer Service Survey

Business Information

Address (Block) _____

Type of Business: Office Retail Restaurant Other

Please check one: Owner Tenant

Type of Business: _____

Average number of employees on a typical day: _____

Employees' average length of stay on a typical day: _____

Customers' average length of stay on atypical day: _____

Busiest day(s) of the week:
Sun Mon Tues Wed Thurs Fri Sat

Busiest time of day:
Before 9am 9am-11am 11am-1pm 1pm-5pm After 5pm

Do you provide parking for your employees? Yes No

Do you provide parking for your customers/visitors? Yes No

Do your employees or customers park in a Montgomery County parking space and if so where?
Employees: On-St. _____, Surface Lot _____, Garage _____
Customers/Visitors: On-St. _____, Surface Lot _____, Garage _____

Unless otherwise noted use the following scale to rate each question:
1. Disagree 2. Somewhat Disagree 3. Agree 4. No Opinion

Customer Surveys:

- Their parking space is conveniently located
- They believe that the parking facility/space was safe and secure
- They believe that parking enforcement is fair
- The parking space/facility was in good condition (clean, well lit, clear signage)
- The parking facility was easy to navigate/maneuver within
- Parking rates are fair

Employee Surveys:

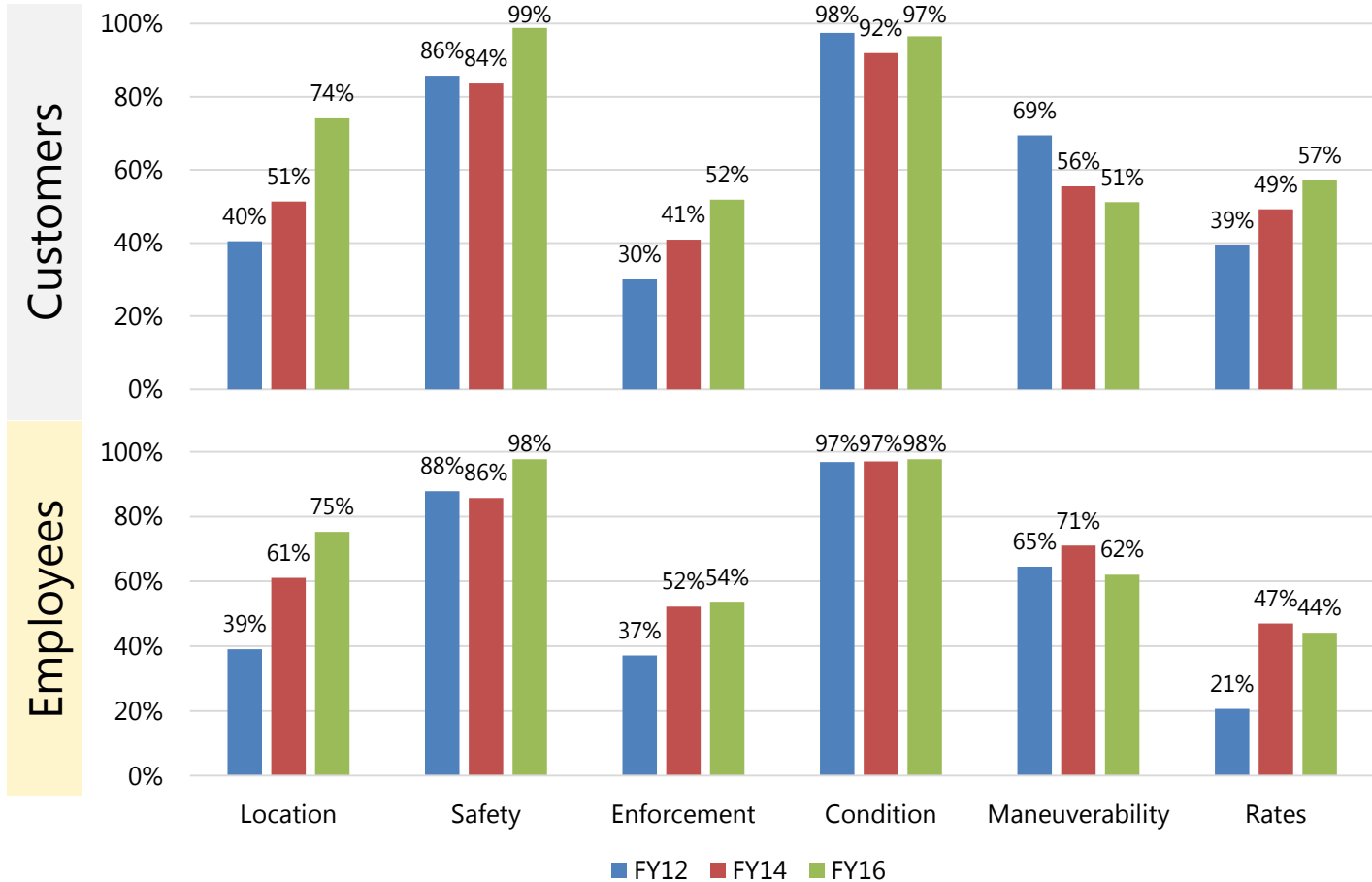
- Their parking space is conveniently located
- They believe that the parking facility/space was safe and secure
- They believe that parking enforcement is fair
- The parking space/facility was in good condition (clean, well lit, clear signage)
- The parking facility was easy to navigate/maneuver within
- Parking rates are fair



Business Survey Results

Multi-Year Analysis

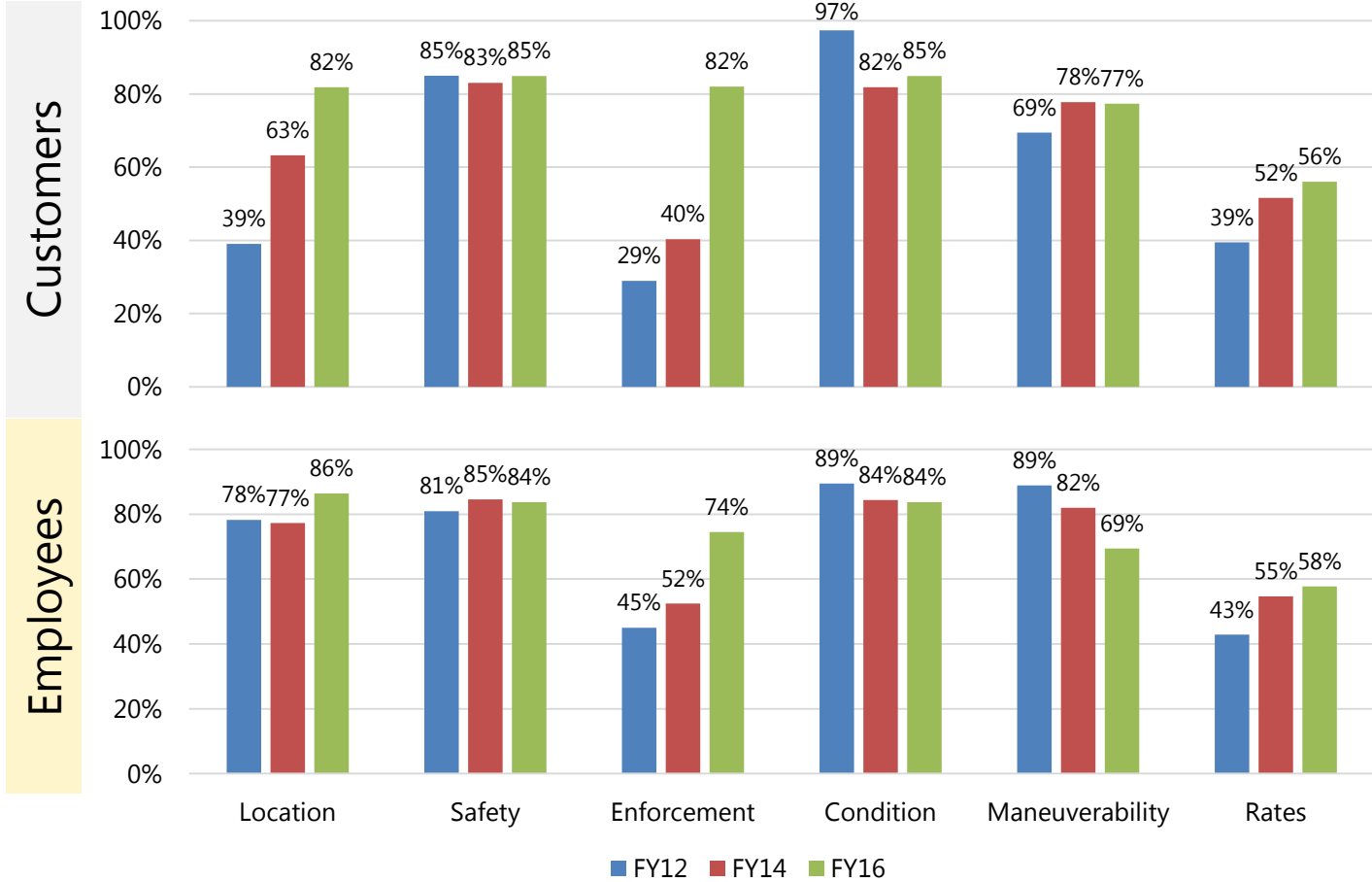
Bethesda Business Ratings



For the past three surveys, Bethesda businesses agreed that the facilities were in good condition and were safe and secure. The lowest agreement came when asked about fairness of parking enforcement and fairness of rates.

Agreement with parking being in convenient location has increased each year of the survey.

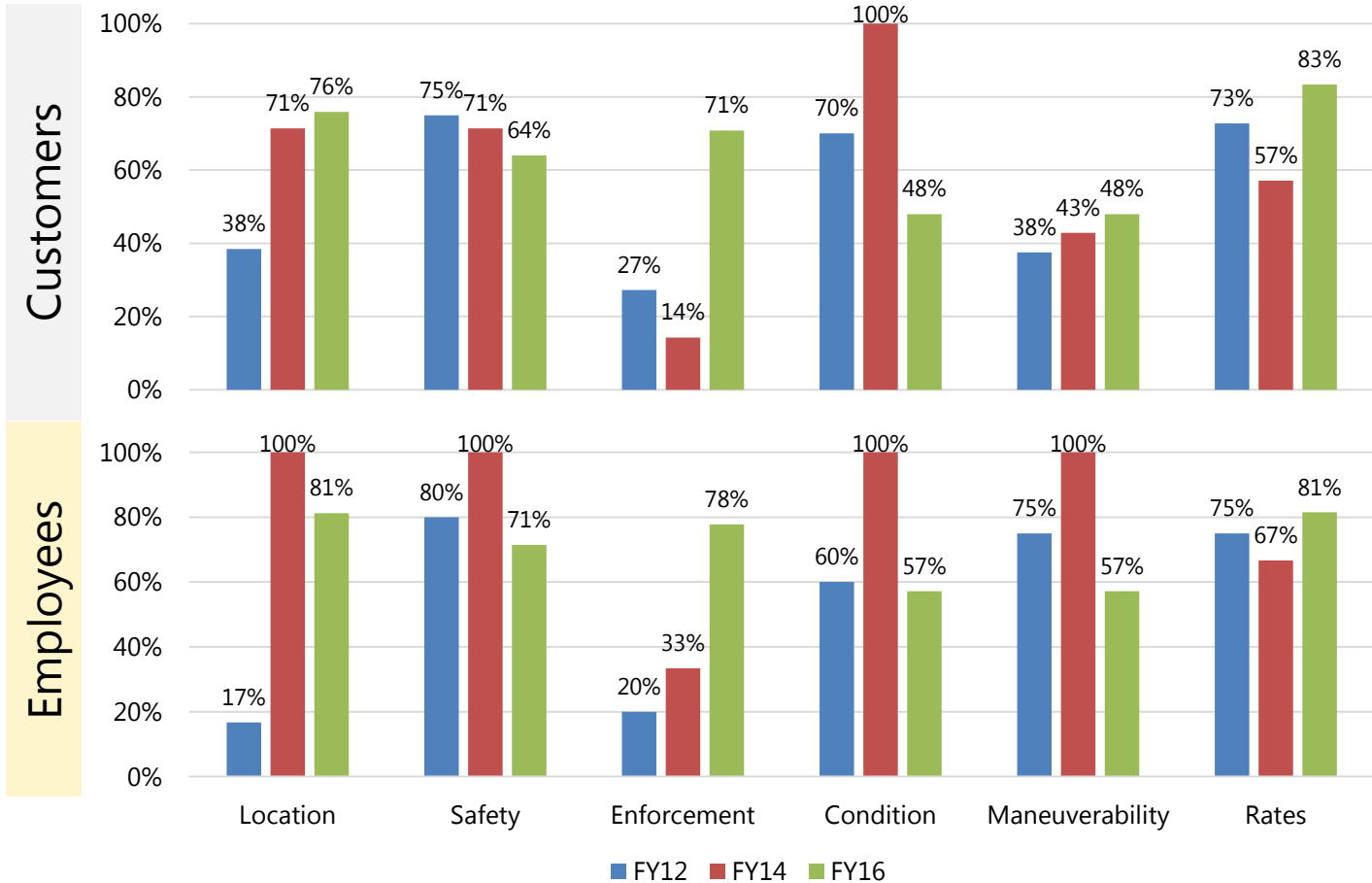
Silver Spring Business Ratings



Perceptions of fair enforcement increased by 42 percentage points for customer parking and 22 percentage points for employee parking from the FY14 survey.

Silver Spring's highest scores were for safety and facility condition. Its lowest scores were over perception of fair parking rates.

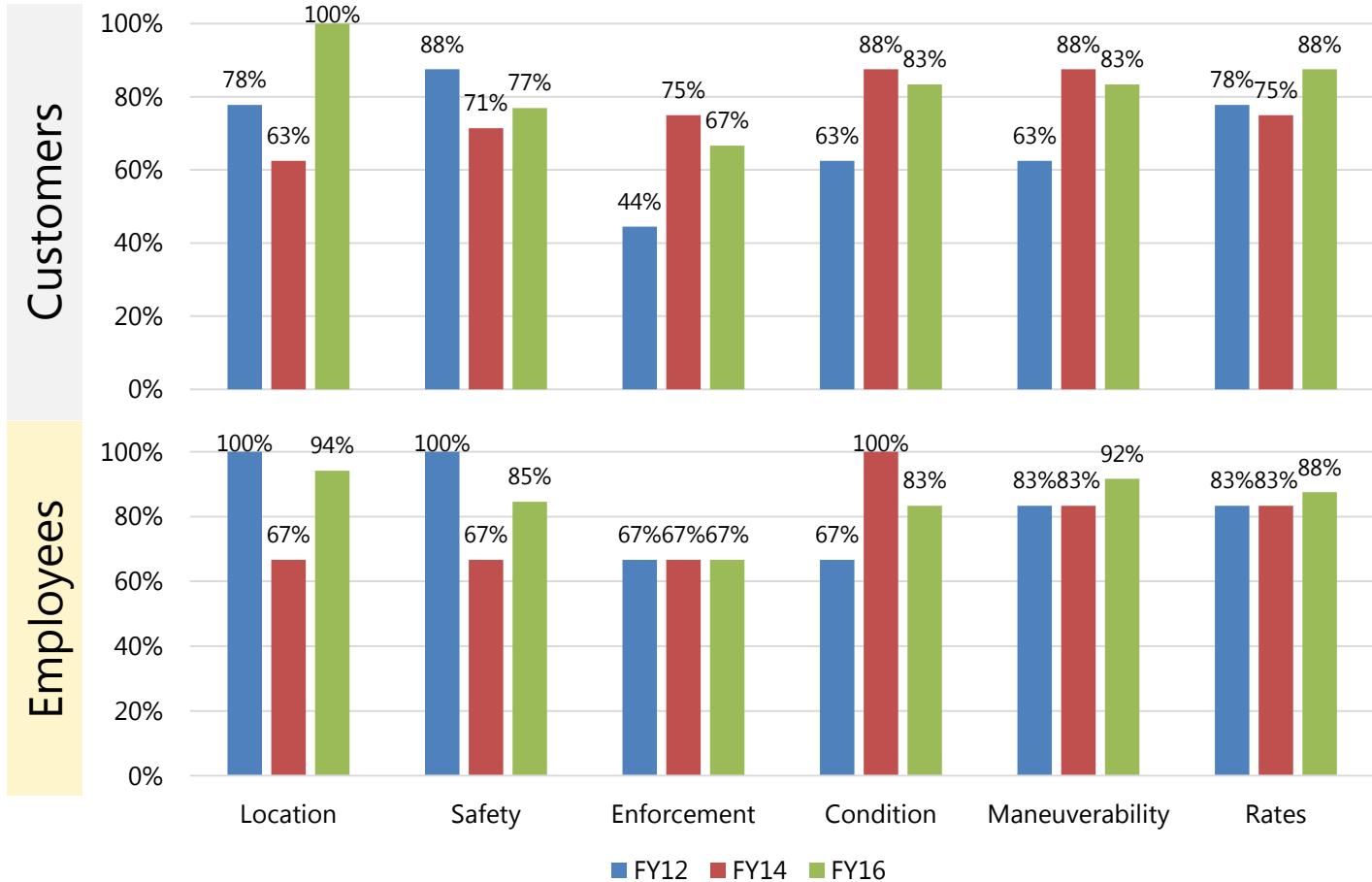
Wheaton Business Ratings



Of the four PLDs, Wheaton had the lowest agreement about the facilities being in good condition and ease of navigation for customers and employees.

Perceptions of fair enforcement increased by 57 and 45 percentage points for customers and employees respectively.

Montgomery Hills Business Ratings



Overall satisfaction for Montgomery Hills businesses was high with the majority agreeing with all 6 survey areas in FY16.

Montgomery Hills businesses had higher agreement over the fairness of parking rates and enforcement than the other PLDs.



Business Survey Results

FY16 Results in Detail

Business Characteristics

	<u>Retail</u>	<u>Restaurant</u>	<u>Office</u>	<u>Other</u>	<u>No Answer</u>	<u>Total</u>
Bethesda	43	21	0	27	0	91
Silver Spring	28	23	7	8	2	68
Wheaton	14	15	1	1	1	32
Montgomery Hills	3	8	0	6	1	18
Total	88 (42%)	67 (32%)	8 (4%)	42 (20%)	4 (2%)	209 (100%)

For the types of businesses surveyed in FY16, there were slightly more restaurants as a percentage of the total (32%) as compared to the FY14 survey (25%).

	<u>Employees</u>			<u>Customers</u>		
	<i>Yes</i>	<i>No</i>	<i>N/A</i>	<i>Yes</i>	<i>No</i>	<i>N/A</i>
Bethesda	33%	67%	0%	30%	70%	0%
Silver Spring	56%	43%	1%	31%	68%	1%
Wheaton	53%	44%	3%	50%	47%	3%
Montgomery Hills	78%	22%	0%	72%	28%	0%

The majority of businesses surveyed in 3 of the 4 PLDs provide employee parking whereas only the businesses in the Montgomery Hills PLD mainly supply parking for their customers.

Business Survey – Customer & Employee Ratings

Average Score		Convenient	Safe	Fair	Facility	Easy	Fair
		Location	Facility	Enforcement	Condition	Maneuverable	Rates
Bethesda	Customer (91)	2.61	2.99	2.31	2.95	2.23	2.35
	Employee (91)	2.61	2.98	2.28	2.97	2.36	2.07
Silver Spring	Customer (68)	2.82	2.85	2.82	2.85	2.75	2.44
	Employee (68)	2.86	2.82	2.72	2.84	2.65	2.40
Wheaton	Customer (32)	2.76	2.64	2.71	2.48	2.48	2.83
	Employee (32)	2.81	2.71	2.78	2.57	2.57	2.81
Montgomery Hills	Customer (18)	3.00	2.77	2.67	2.83	2.83	2.88
	Employee (18)	2.94	2.85	2.67	2.83	2.92	2.88

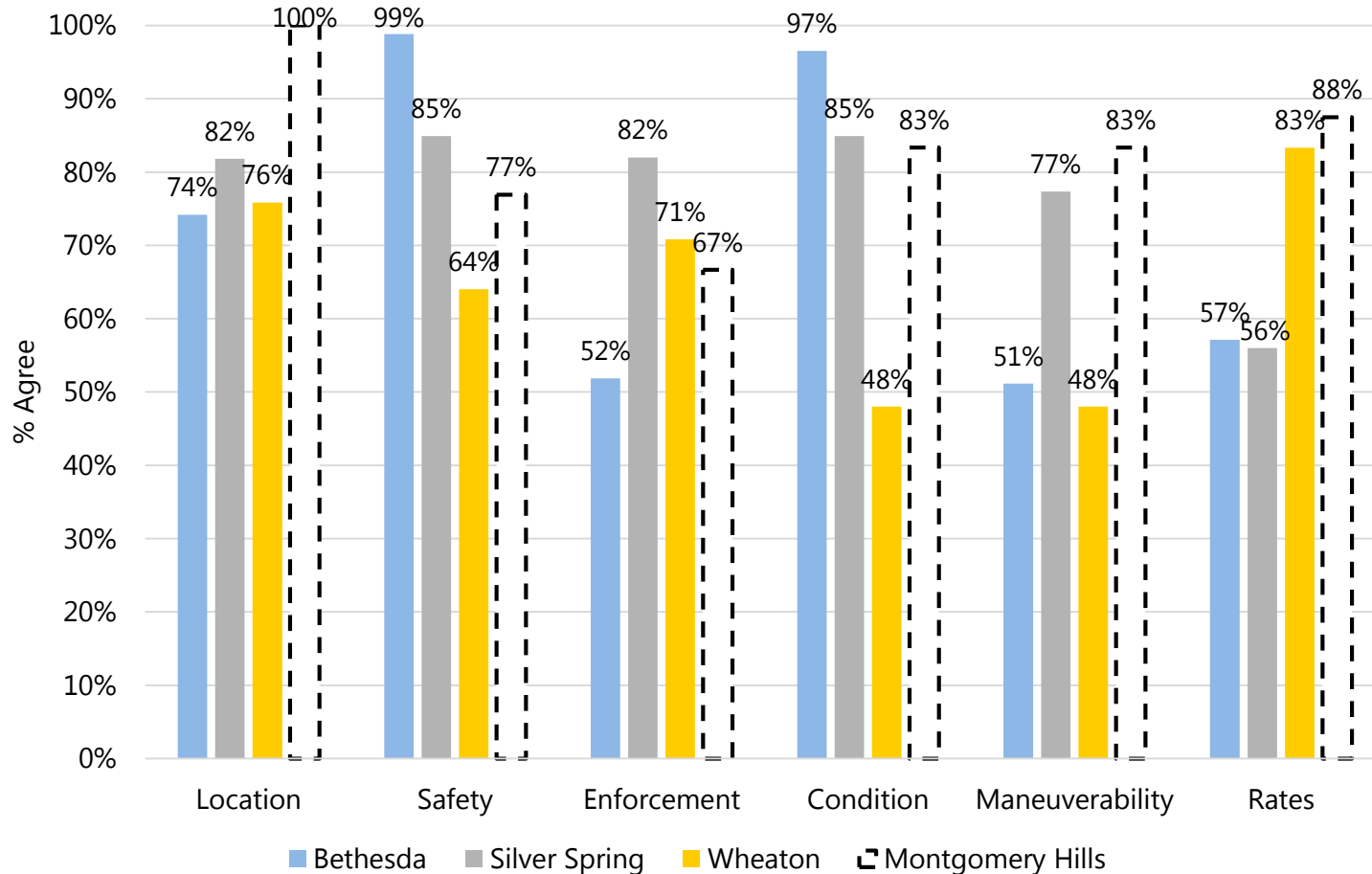
% Agree (excludes "No Opinion")		Convenient	Safe	Fair	Facility	Easy	Fair
		Location	Facility	Enforcement	Condition	Maneuverable	Rates
Bethesda	Customer (91)	74%	99%	52%	97%	51%	57%
	Employee (91)	75%	98%	54%	98%	62%	44%
Silver Spring	Customer (68)	82%	85%	82%	85%	77%	56%
	Employee (68)	86%	84%	74%	84%	69%	58%
Wheaton	Customer (32)	76%	64%	71%	48%	48%	83%
	Employee (32)	81%	71%	78%	57%	57%	81%
Montgomery Hills	Customer (18)	100%	77%	67%	83%	83%	88%
	Employee (18)	94%	85%	67%	83%	92%	88%

Key: **Red Text** = Agreement below 50%

Across all PLDs, the majority of businesses agreed with the 6 statements about the state of customer and employee parking. The lowest agreement was in fair rates, ease of maneuvering in facility and fairness of enforcement.

**The sample size is listed in parentheses. If the business responded to at least one survey question, it is counted in the sample size for the parking district. Some businesses gave their business and customer characteristics, but did not answer survey questions.*

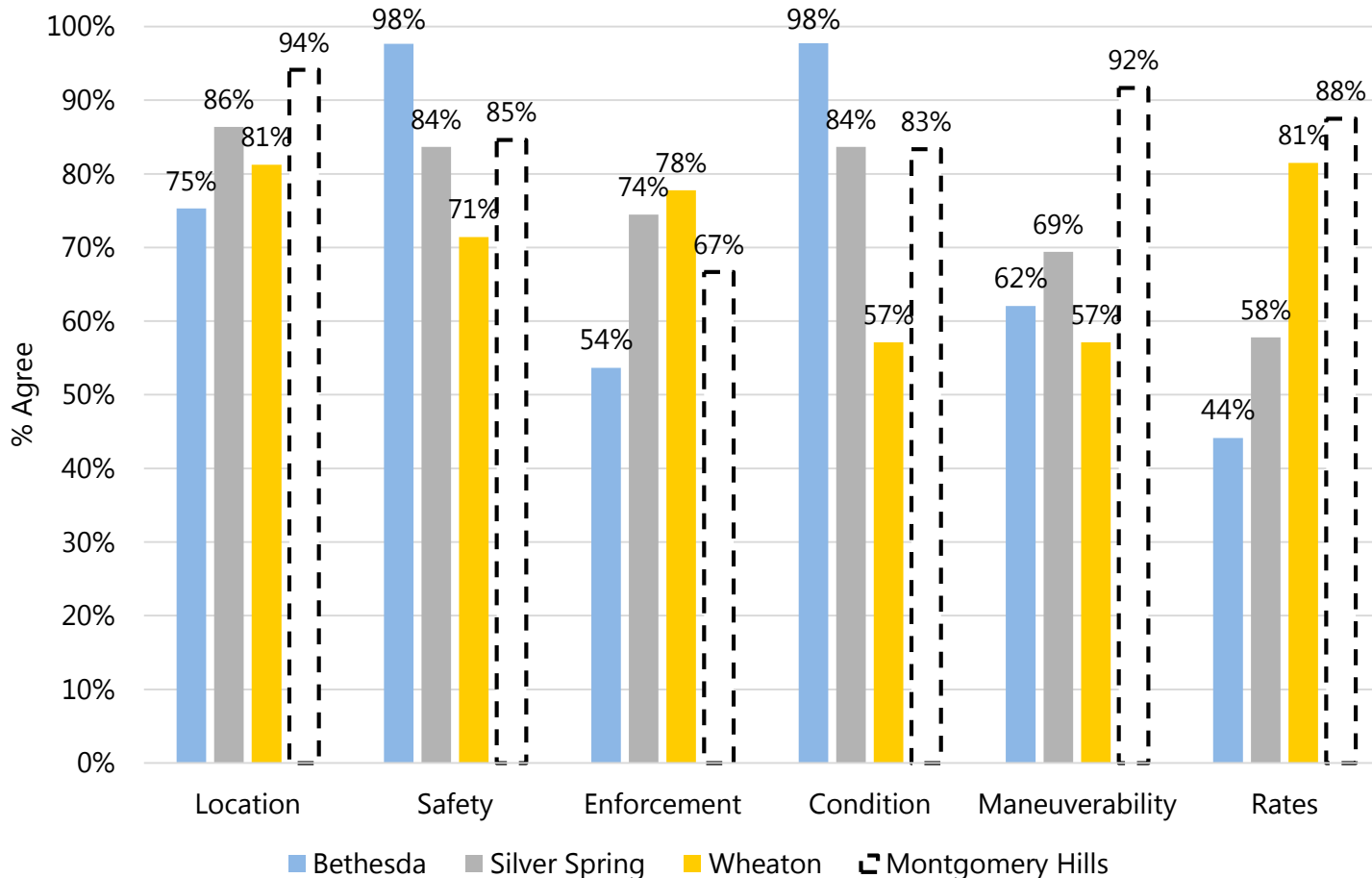
Business Survey – Customer Ratings



For customer parking, the perception of fair enforcement was lowest in Bethesda with 52% agreeing.

Bethesda and Wheaton had lower scores on maneuverability with agreement at 51% and 48% respectively.

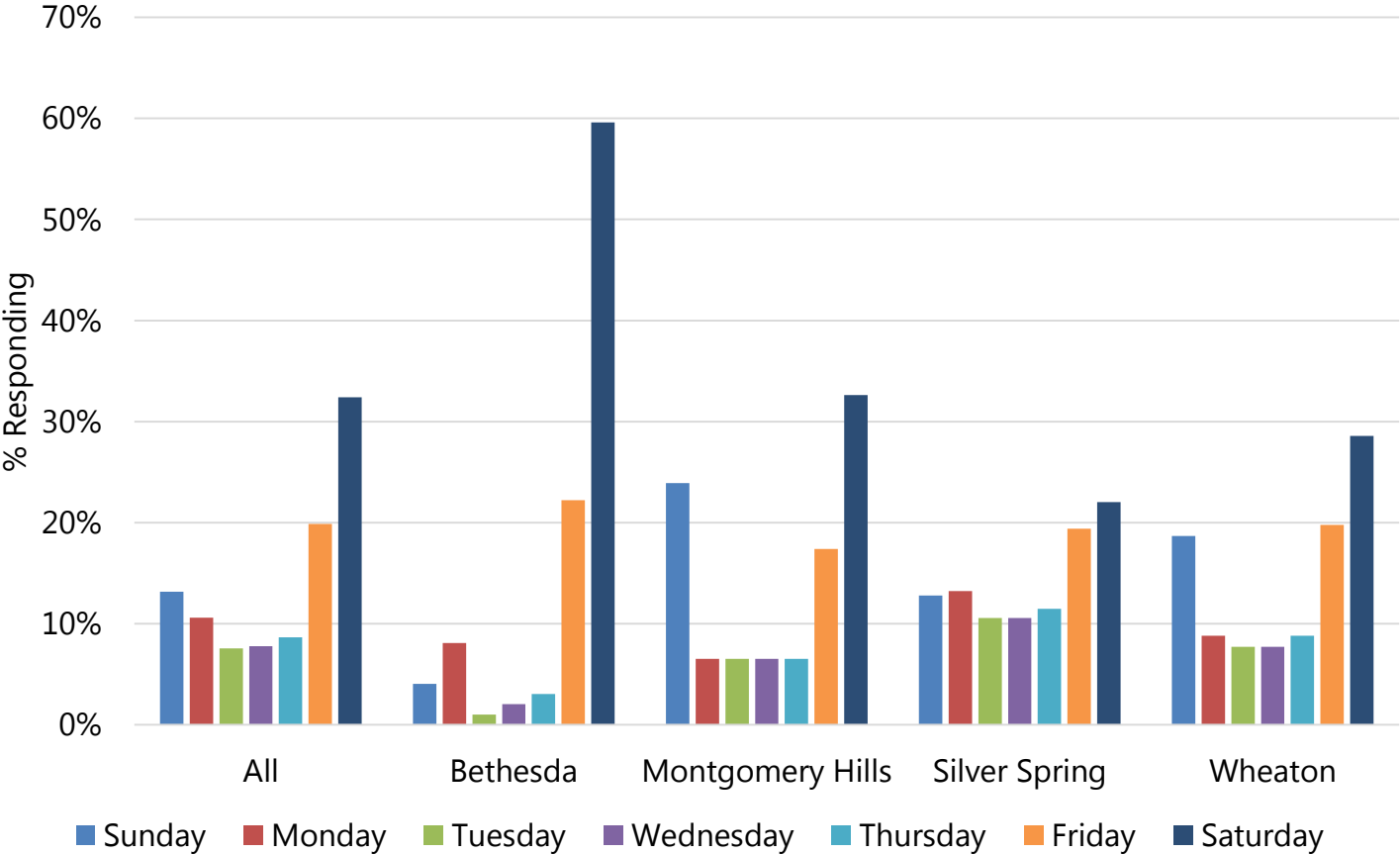
Business Survey – Employee Ratings



As with customers, businesses found the facilities for employees were conveniently located and were safe and secure.

Only 44% of Bethesda businesses agreed that parking rates were fair for their employees. The variance between customers and employees for fairness of rates in Bethesda was 13 percentage points.

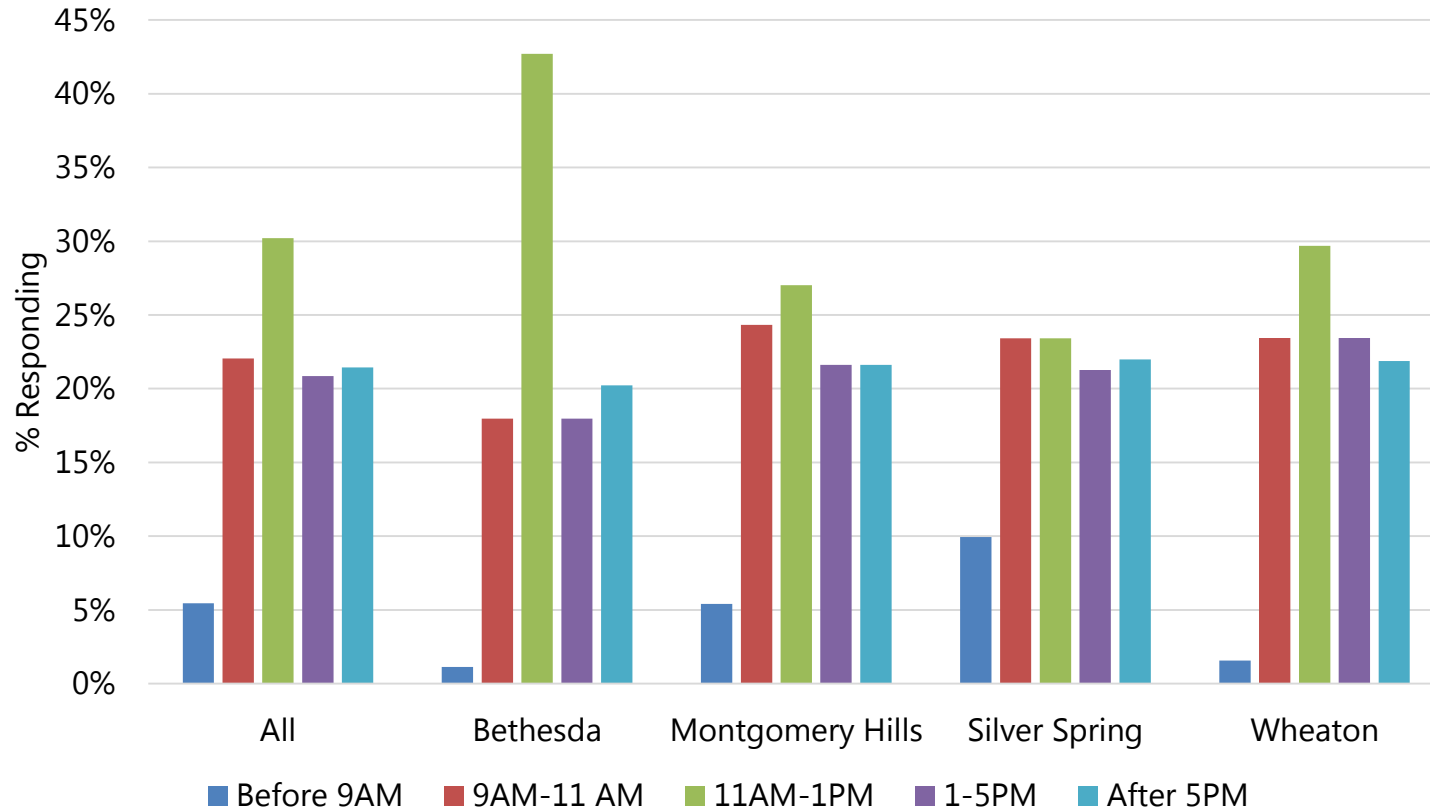
Business Survey – Busiest Day of the Week



For 3 out of the 4 PLDs, Friday and Saturday were their busiest days of the week. The exception was Montgomery Hills, where Saturday and Sunday were busiest.

***NOTE:** Survey respondents indicated multiple days and times that were the busiest periods for their business. The results shown above are not adjusted for the multiple responses.

Business Survey – Busiest Time of Day by PLD



The lunch period, 11AM – 1PM, was the busiest time across all PLDs. This result was somewhat biased due to the number of retail stores surveyed which are busiest from 11AM – 1PM (see page 26 for breakdown by establishment type).

***NOTE:** Survey respondents indicated multiple days and times that were the busiest periods for their business. The results shown above are not adjusted for the multiple responses.

Business Survey – Busiest Times for Bethesda

Bethesda businesses surveyed reported busiest times on Saturday afternoons.

Bethesda	Before 9 AM	9-11 AM	11AM-1 PM	1-5 PM	After 5 PM
Sunday	0	1	4	0	0
Monday	0	4	3	1	0
Tuesday	0	0	0	0	0
Wednesday	0	0	1	1	0
Thursday	0	0	0	1	2
Friday	0	3	7	4	8
Saturday	1	10	26	9	15

***NOTE:** Survey respondents indicated multiple days and times that were the busiest periods for their business. The results shown above are not adjusted for the multiple responses.

Business Survey – Busiest Times for Silver Spring

Silver Spring	Before 9 AM	9-11 AM	11AM-1 PM	1-5 PM	After 5 PM
Sunday	6	16	16	15	9
Monday	11	15	15	8	12
Tuesday	8	11	14	7	9
Wednesday	7	11	14	7	10
Thursday	8	10	14	8	12
Friday	11	13	16	14	27
Saturday	9	24	23	26	24

Silver Spring businesses surveyed reported busiest times on Saturday and Sunday between 9AM and 5PM. The busiest single day and time was Friday after 5PM.

***NOTE:** Survey respondents indicated multiple days and times that were the busiest periods for their business. The results shown above are not adjusted for the multiple responses.

Business Survey – Busiest Times for Montgomery Hills

Montgomery Hills	Before 9 AM	9-11 AM	11AM-1 PM	1-5 PM	After 5 PM
Sunday	1	8	8	7	3
Monday	1	1	1	0	2
Tuesday	1	1	1	0	2
Wednesday	1	1	1	0	2
Thursday	1	1	1	0	2
Friday	1	1	2	1	6
Saturday	1	8	9	8	6

Montgomery Hills businesses followed a similar pattern to the Silver Spring PLD with busiest times being Friday after 5PM, and weekends between 9AM and 5PM.

***NOTE:** Survey respondents indicated multiple days and times that were the busiest periods for their business. The results shown above are not adjusted for the multiple responses.

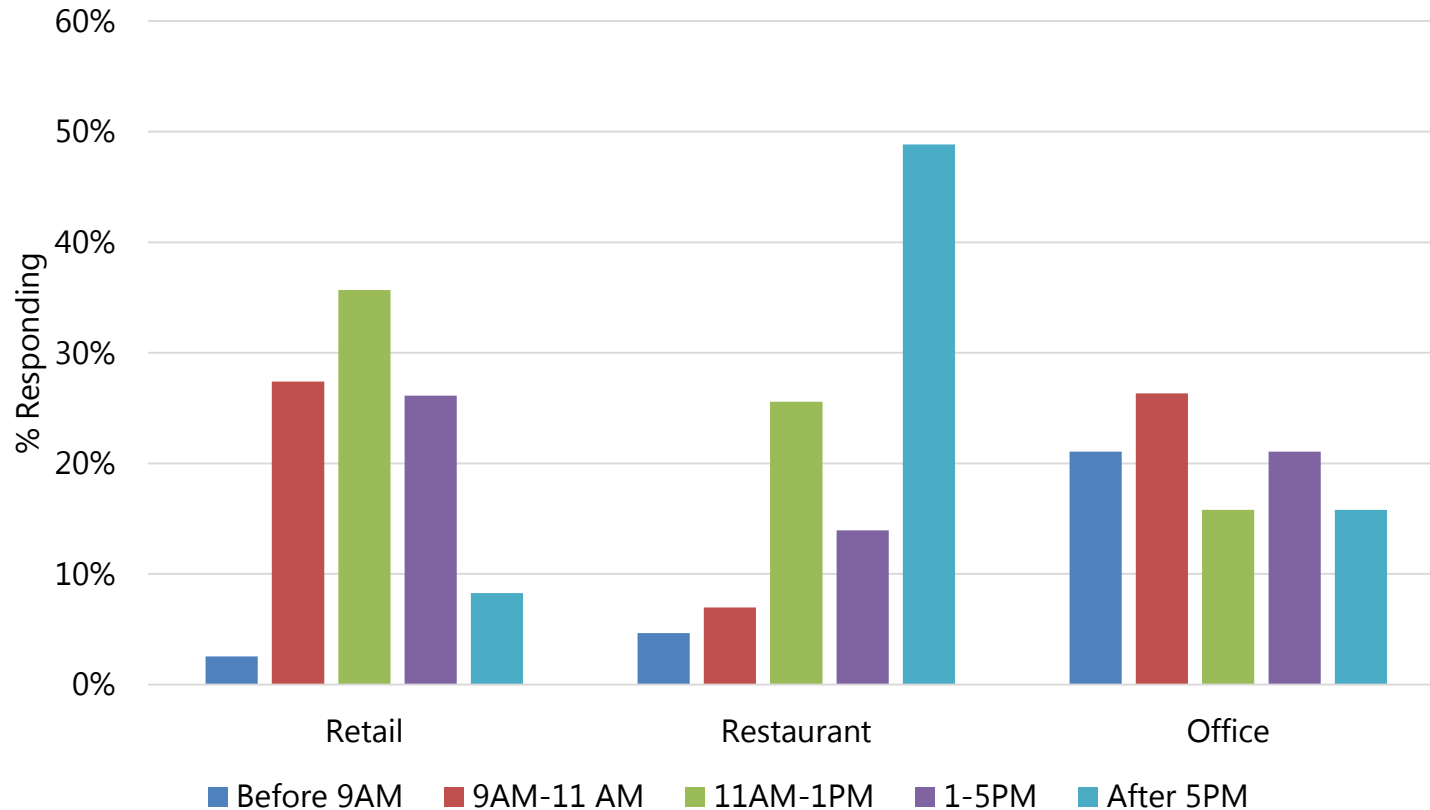
Business Survey – Busiest Times for Wheaton

Wheaton	Before 9 AM	9-11 AM	11AM-1 PM	1-5 PM	After 5 PM
Sunday	1	12	13	11	5
Monday	1	4	6	2	3
Tuesday	0	3	6	2	2
Wednesday	0	3	6	2	2
Thursday	0	3	6	3	3
Friday	1	4	6	5	12
Saturday	1	13	13	14	12

Wheaton businesses followed a similar pattern to the Silver Spring PLD with busiest times being Friday after 5PM, and weekends between 9AM and 5PM.

***NOTE:** Survey respondents indicated multiple days and times that were the busiest periods for their business. The results shown above are not adjusted for the multiple responses.

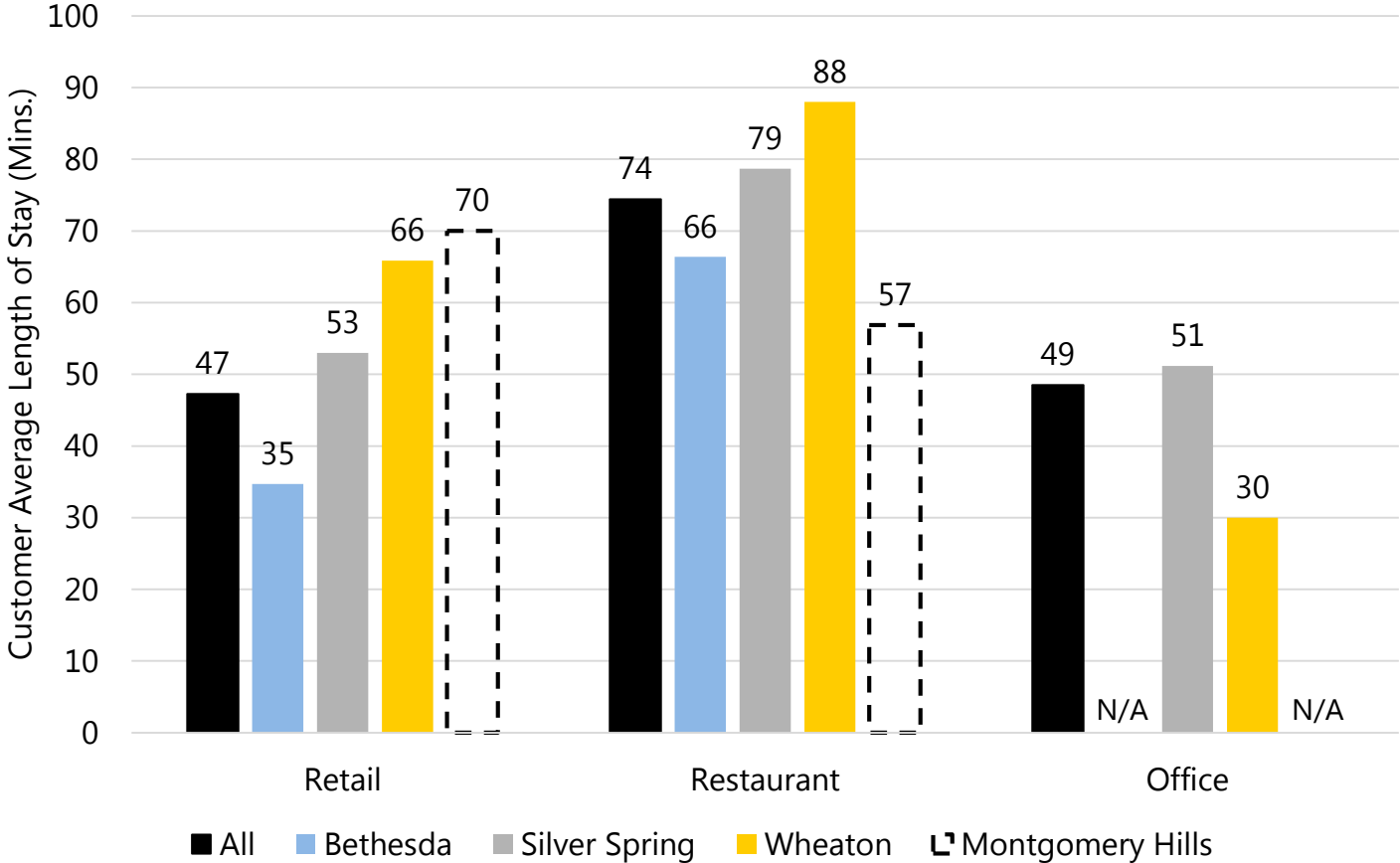
Business Survey – Busiest Time of Day by Business Type



The lunch period, 11AM – 1PM, was the busiest time for retail, whereas after 5PM was busiest for restaurants.

***NOTE:** Survey respondents indicated multiple days and times that were the busiest periods for their business. The results shown above are not adjusted for the multiple responses.

Business Survey – Customer Length of Stay



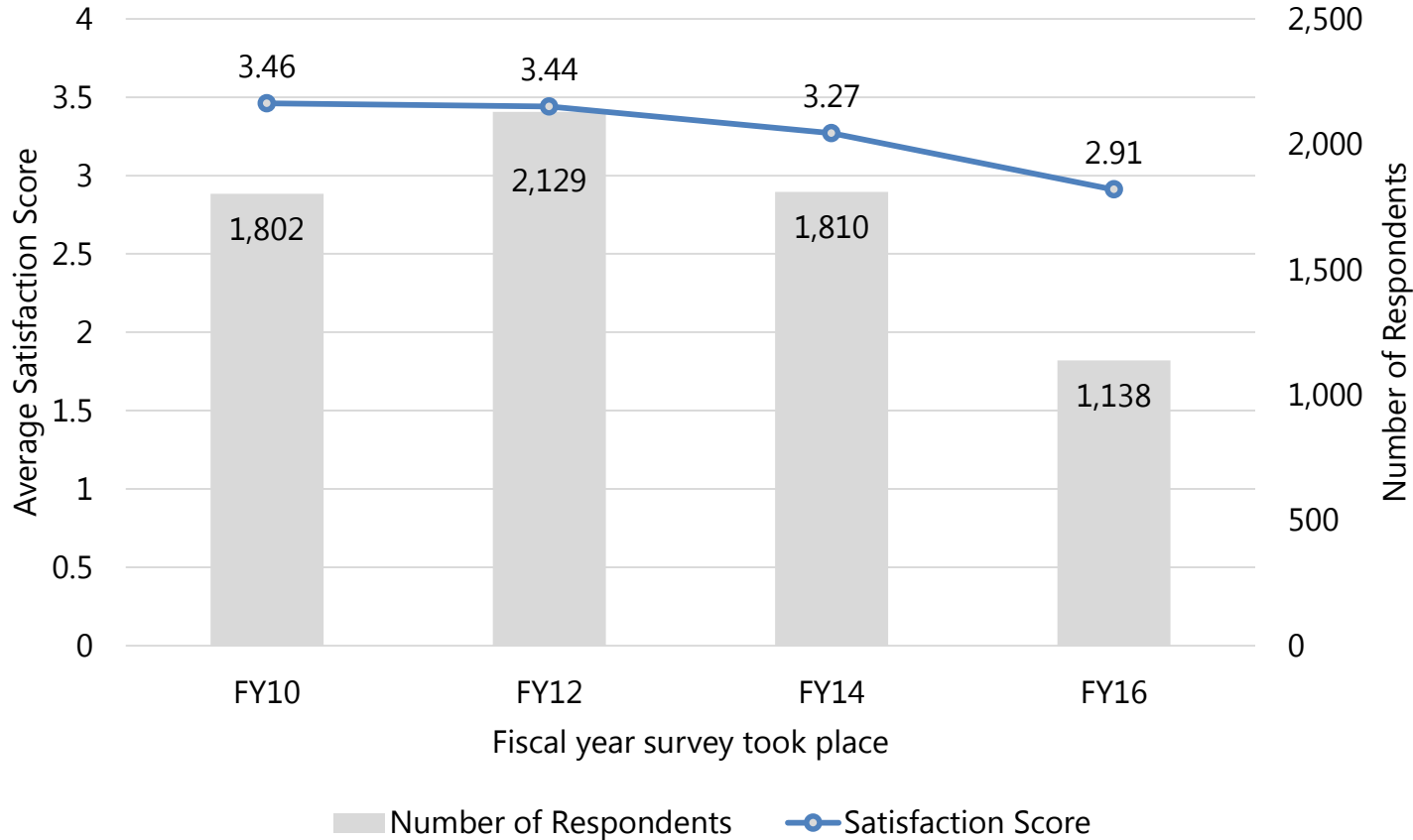
Bethesda retail survey respondents reported the shortest average time for customers in their stores with 35 minutes. Each PLD averaged around one hour for the length of stay in restaurants.



Pedestrian Survey Results

Overview

Overall Customer Satisfaction Score for PLDs



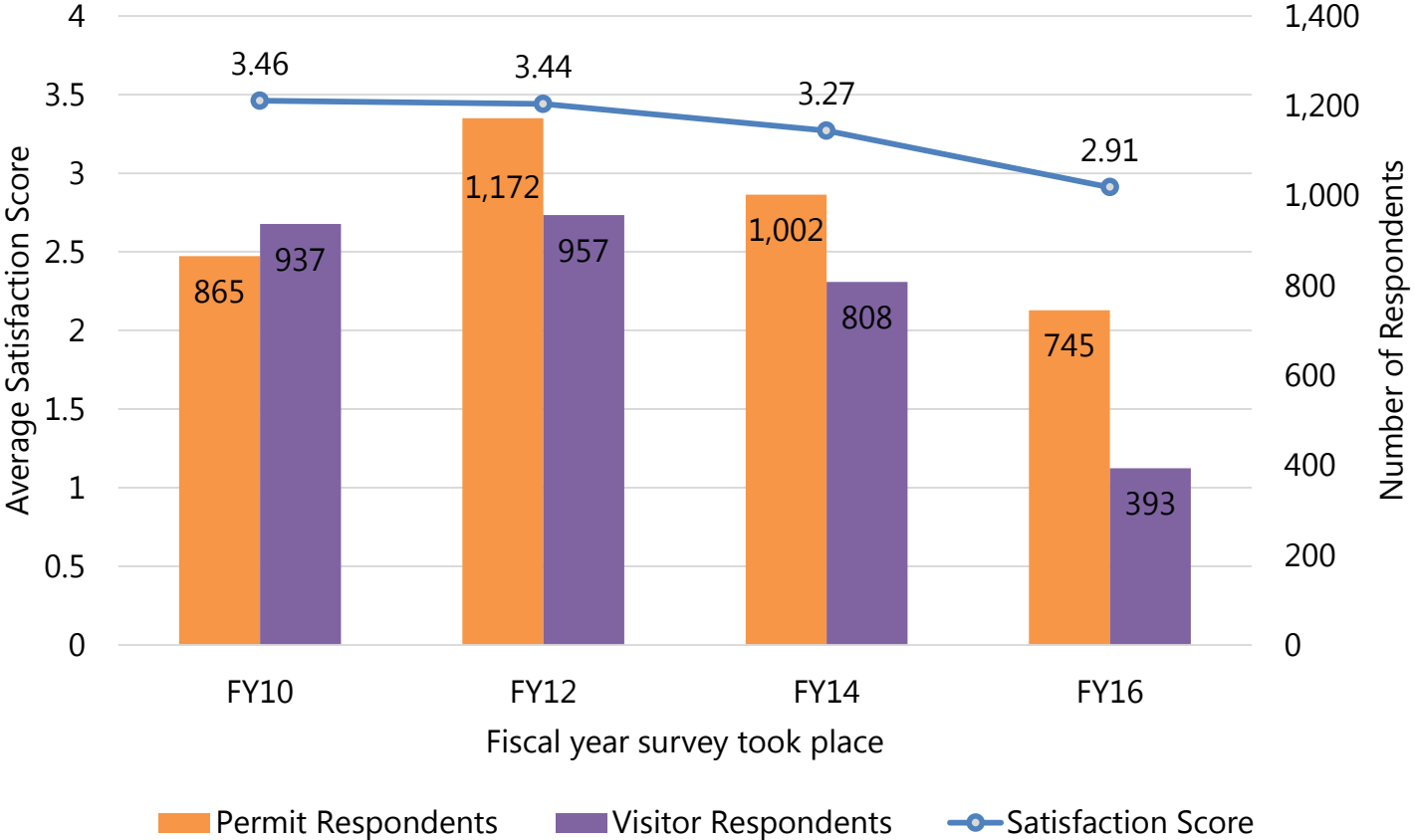
Overall satisfaction for the Parking Lot Districts (PLDs) dropped 11% from 3.27 in FY14 to 2.91 in FY16. The FY16 results are the lowest since the survey began in FY10.

The FY16 survey was conducted in December whereas previous surveys were completed in October or November.

The sample size for FY16 was also the smallest recorded and 47% smaller than the FY12 sample.

NOTE: Respondent count excludes “street” parkers for FY10 and FY12 since their responses were not used in calculating the average satisfaction score for those years.

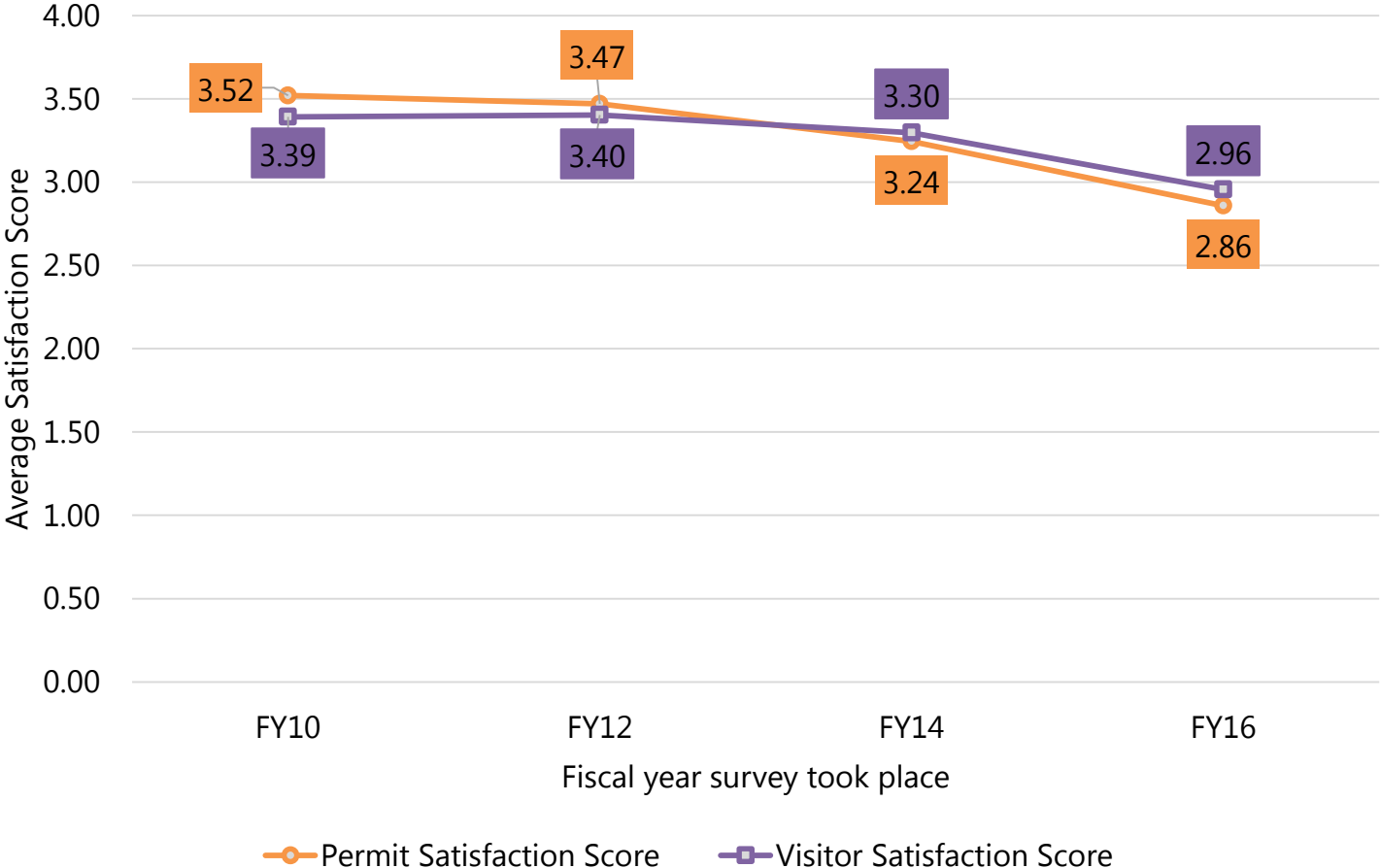
Permit vs. Visitor Parkers by Year



The FY10 survey was the only survey where more visitors than permit parkers were surveyed. For FY12 and FY14, there were approximately 4 visitors for every 5 permit parkers surveyed. For FY16, that ratio dropped to 1 visitor to 2 permit parkers.

NOTE: Respondent count excludes "street" parkers for FY10 and FY12 since their responses were not used in calculating the average satisfaction score for those years.

Permit vs. Visitor Satisfaction by Year



From FY14 to FY16, overall visitor satisfaction declined 10% and permit holder satisfaction declined by 12%.



Pedestrian Survey Results

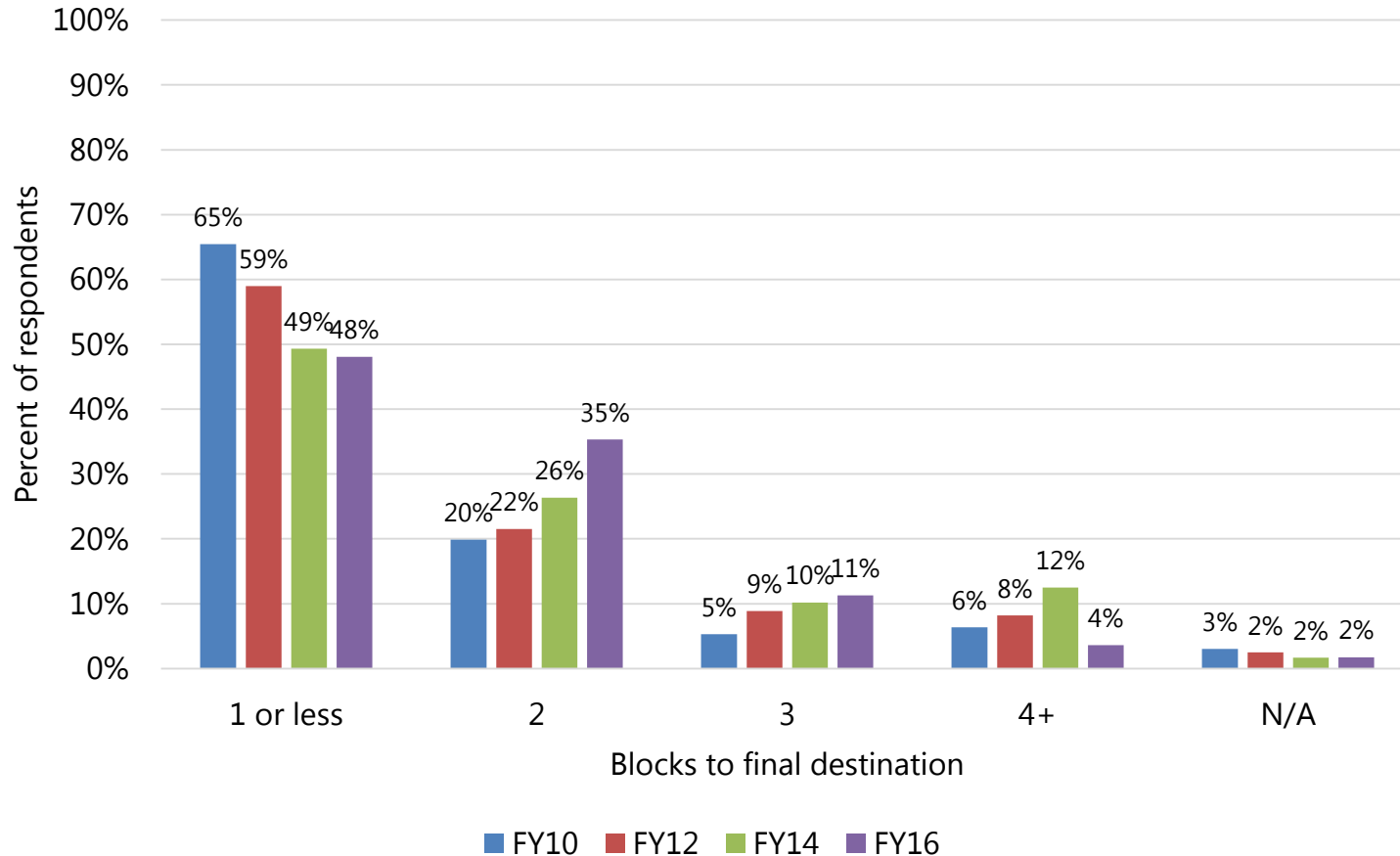
Permit Parkers

FY16 Parker Characteristics

		How many blocks is it to your final destination?						How do you purchase/renew your parking permit?				
		1 or less	2	3	4+	N/A	Total	Mail	Walk-In	Both/Other	N/A	Total
Permit Holders	Garage	241	151	53	22	13	480	6	360	103	11	480
	Lot	110	106	23	5	0	244	1	166	42	35	244
	On-Street	7	6	8	0	0	21	0	0	0	21	21
	Total	358	263	84	27	13	745	7	526	145	67	745
	Percent	48%	35%	11%	4%	2%	100%	1%	71%	19%	9%	100%

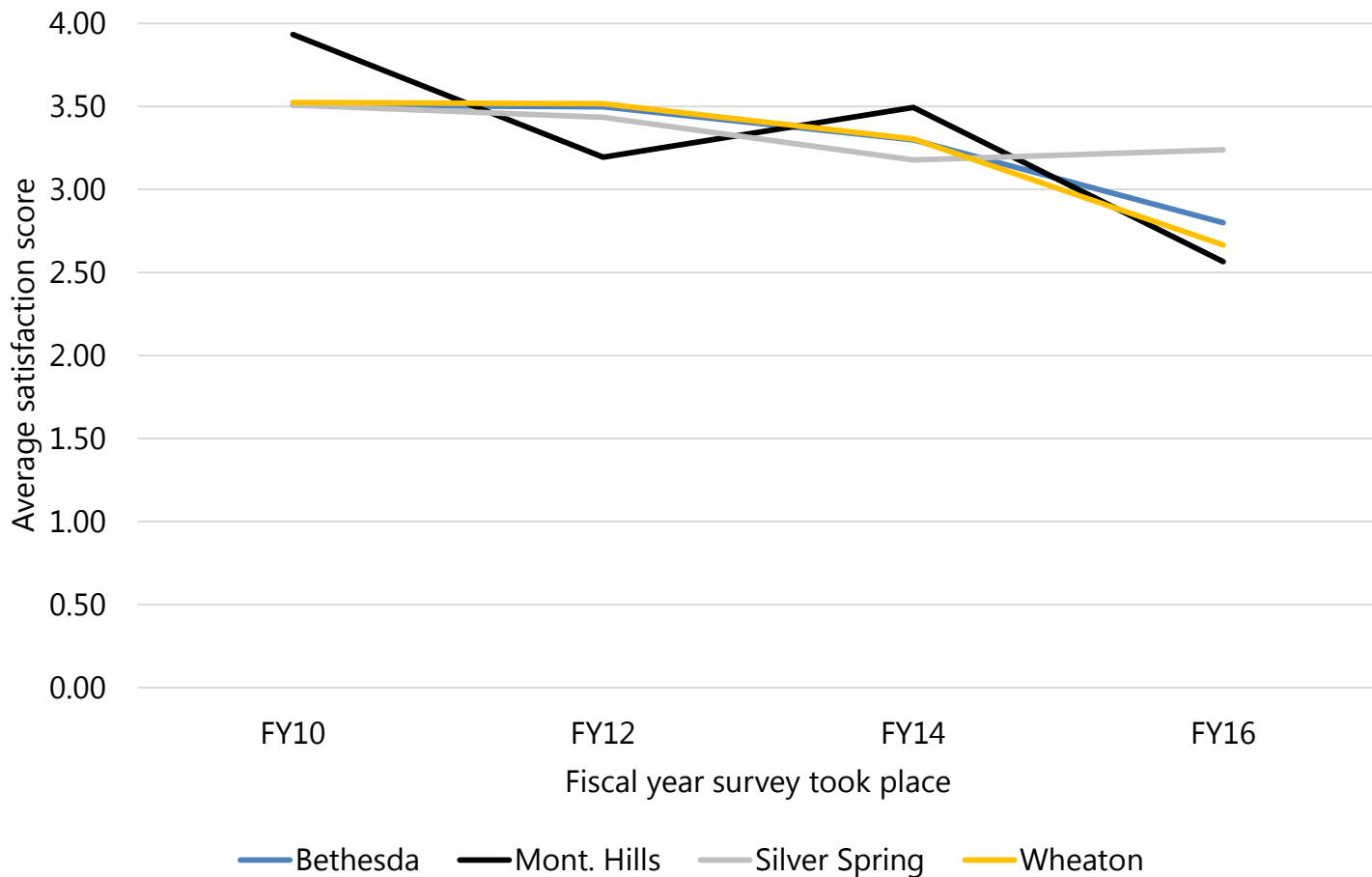
Visitors	Garage	67	45	29	35	5	181
	Lot	81	39	6	3	0	129
	On-Street	34	35	14	0	0	83
	Total	182	119	49	38	5	393
	Percent	46%	30%	13%	10%	1%	100%

Permit Parker Characteristics Over Time



In FY16, there were more respondents that were travelling 2 blocks to their final destination as compared to prior years but less respondents travelling 4 or more blocks. Those travelling one block or less was similar to the FY14 survey, but below the FY10 and FY12 results.

Permit Parkers – Customer Satisfaction Score by Parking District



3 out of the 4 parking districts saw a decline in customer satisfaction between FY14 and FY16. Silver Spring PLD remained near a 3.2 satisfaction rating. FY16 scores were the lowest for each parking district since the survey began in FY10.

FY16 Permit Holder Satisfaction by PLD

<u>Garage/ Lot</u>	<u>Availability</u>	<u>Navigation</u>	<u>Facility Condition</u>	<u>Safety And Security</u>	<u>Destination Convenience</u>	<u>Sign-up Ease</u>	<u>Cost of Parking</u>	<u>Overall</u>
Bethesda	2.99	2.84	2.66	2.88	3.18	2.80	2.25	2.80
Silver Spring	3.29	3.23	3.39	3.30	3.50	3.12	2.83	3.24
Wheaton	2.80	2.32	2.69	2.66	3.09	2.69	2.40	2.67
Montgomery Hills	3.00	2.20	2.23	2.64	2.95	No Response	2.36	2.56
Average	3.01	2.76	2.81	2.91	3.22	2.87	2.43	2.86

Silver Spring PLD ranked highest across all 7 survey areas for permit parkers in FY16. Permit parkers had the highest satisfaction with their parking facilities convenience to the final destination and availability of parking.

FY16 Permit Holder Satisfaction by Facility

Garage/ Lot	Availability	Navigation	Facility Condition	Safety And Security	Destination Convenience	Sign-up Ease	Cost of Parking	Overall
35	3.94	3.78	3.78	4.00	3.78	3.38	2.61	3.61
9	3.68	3.60	3.80	3.73	3.85	3.56	2.84	3.58
42	3.87	3.87	3.87	3.80	3.84	3.48	2.31	3.58
7	3.32	3.34	3.70	3.50	3.81	2.60	2.88	3.31
60	3.25	3.17	2.96	2.96	3.13	3.50	2.75	3.10
29	3.00	3.00	3.00	3.00	3.00	No Response	3.00	3.00
11	3.01	2.55	2.78	2.81	3.20	No Response	2.84	2.86
45	2.96	2.51	2.85	2.97	3.25	2.80	2.36	2.81
25	3.00	3.07	2.51	2.91	2.93	2.93	2.07	2.77
48	3.00	2.14	2.34	2.59	2.97	No Response	2.45	2.58
13	2.74	2.21	2.57	2.50	3.00	2.50	2.37	2.56
12	3.00	2.33	2.00	2.73	2.93	No Response	2.20	2.53
14	2.48	2.13	2.61	2.26	3.00	2.00	2.64	2.44
49	2.52	2.45	1.98	2.39	2.94	2.44	1.83	2.36
3	N/A – Only locations with 15 or more survey responses are shown							
5/55								
24								
On-Street B								
On-Street SS								
Average	3.01	2.76	2.81	2.91	3.22	2.87	2.43	2.86

Key:

Bethesda
Silver Spring
Wheaton
Montgomery Hills

= Below Average Rating at a Statistically Significant Level
 = Above Average Rating at a Statistically Significant Level

Permit Parkers - Customer Satisfaction by Facility

Facility Number	FY10	FY12	FY14	FY16	Change from FY14 to FY16
2	3.30		3.25		
3	3.17		3.10		
5/55	3.69	3.18	3.18		
7	3.33	3.65	3.43	3.31	-0.12 (-3%)
9			3.68	3.58	-0.10 (-3%)
11	3.68	3.58	3.31	2.86	-0.45 (-14%)
12			3.80	2.53	-1.27 (-33%)
13	3.49		3.43	2.56	-0.87 (-25%)
14				2.44	
25	3.47		3.51	2.77	-0.74 (-21%)
29			3.28	3.00	-0.28 (-9%)
31	3.37	2.95			
35	2.97	3.79	3.47	3.61	+0.14 (+4%)
42	3.58	3.80	3.59	3.58	-0.01 (0%)
45	3.55	3.63	3.30	2.81	-0.49 (-15%)
48	3.91		3.33	2.58	-0.75 (-23%)
49	3.55	3.34	3.44	2.36	-1.08 (-31%)
57	3.44		2.99		
58	2.66	3.44	3.32		
60	3.65	3.18	2.85	3.10	+0.25 (+9%)

Of the 13 facilities with data in FY14 and FY16, 8 had declines, 4 were stable, and one facility increased in overall satisfaction. The largest drop was for Lot 12 in Montgomery Hills with a 33% decrease in overall satisfaction. The lone improvement was for Garage 60 in Silver Spring, which had an overall satisfaction score similar to its FY12 scores.

Key: Bethesda Silver Spring Wheaton Montgomery Hills = Lower Avg. Rating compared to FY14 = Higher Avg. Rating compared to FY14



Pedestrian Survey Results

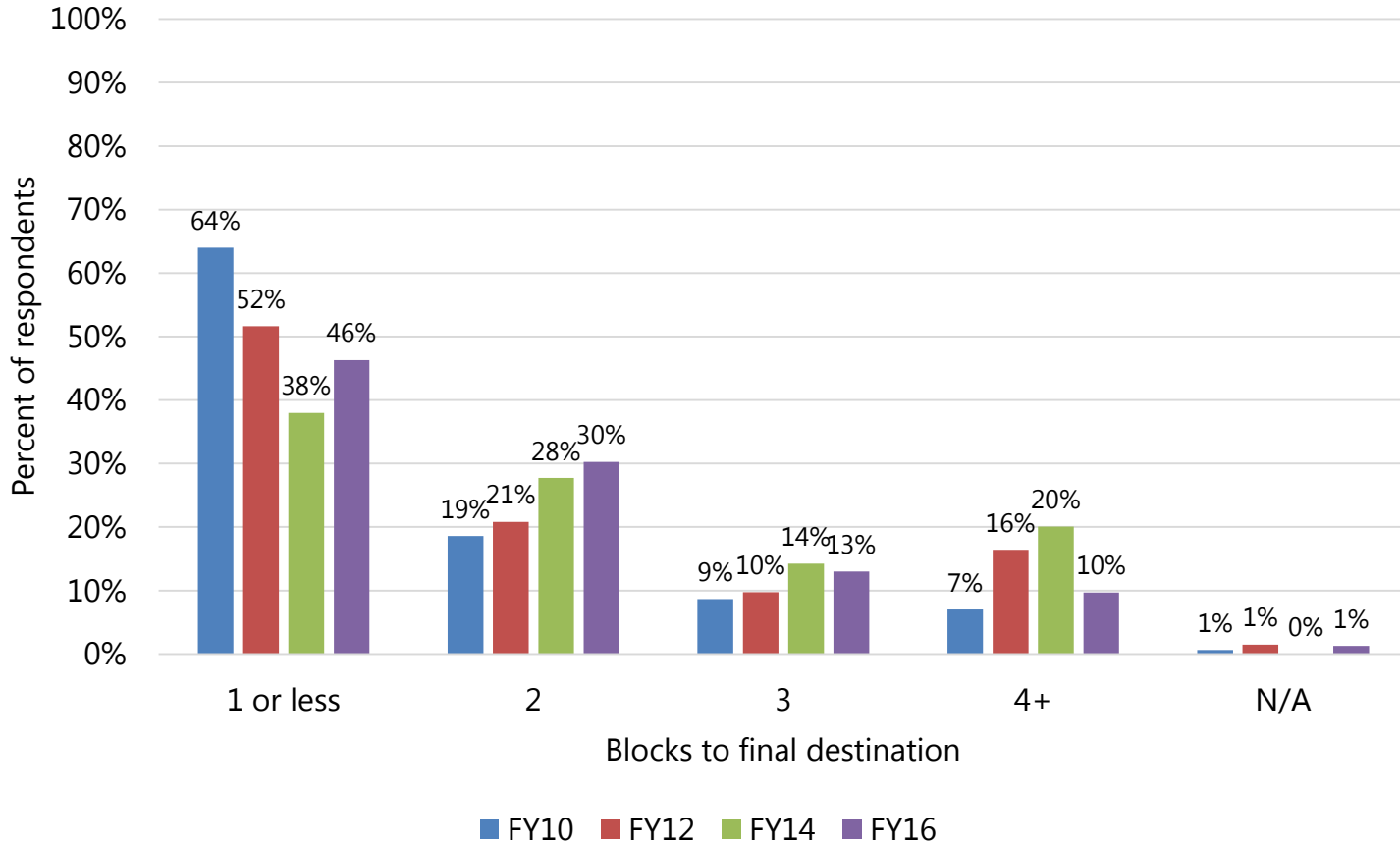
Visitor Parkers

FY16 Parker Characteristics

		How many blocks is it to your final destination?						How do you purchase/renew your parking permit?				
		1 or less	2	3	4+	N/A	Total	Mail	Walk-In	Both/Other	N/A	Total
Permit Holders	Garage	241	151	53	22	13	480	6	360	103	11	480
	Lot	110	106	23	5	0	244	1	166	42	35	244
	On-Street	7	6	8	0	0	21	0	0	0	21	21
	Total	358	263	84	27	13	745	7	526	145	67	745
	Percent	48%	35%	11%	4%	2%	100%	1%	71%	19%	9%	100%

Visitors	Garage	67	45	29	35	5	181
	Lot	81	39	6	3	0	129
	On-Street	34	35	14	0	0	83
	Total	182	119	49	38	5	393
	Percent	46%	30%	13%	10%	1%	100%

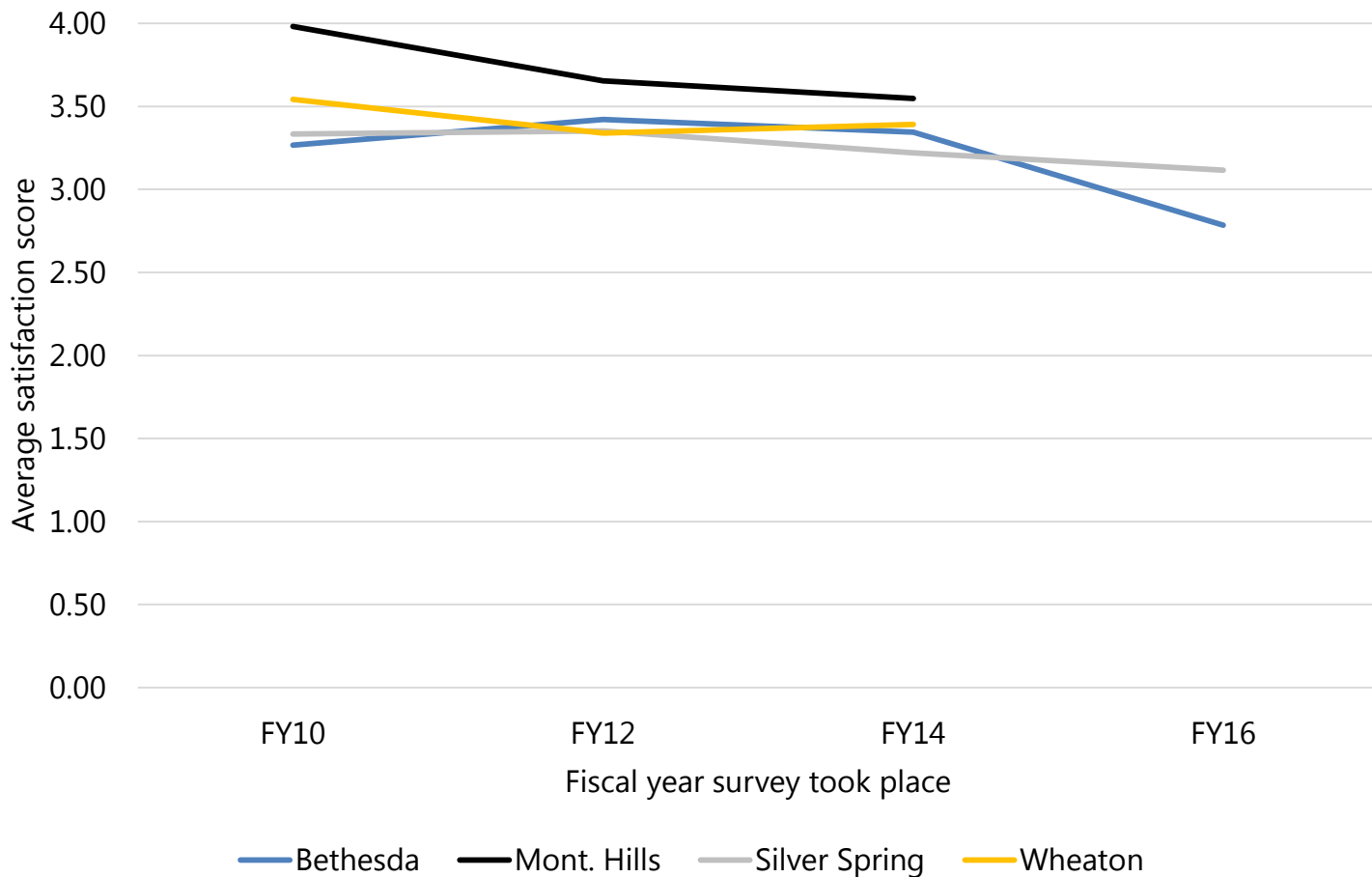
Visitor Parker Characteristics Over Time



In every year of the survey, the plurality of visitors are travelling one block or less to their final destination.

The number of visitor parkers travelling one block or less to their destination was up 8 percentage points as compared to the FY14 results, but in line with the FY12 results.

Visitor Parkers – Customer Satisfaction Score by Parking District



Two PLDs in FY16, Wheaton and Montgomery Hills, had less than 15 total visitors responding so the scores are not shown.

For Silver Spring, the scores have remained fairly steady year-to-year with a high score of 3.35 in FY10 and a low of only 3.12 in FY16.

Bethesda visitors' satisfaction declined from 3.39 in FY14 to 2.79 in FY16 (-17%).

FY16 Visitor Holder Satisfaction by PLD

<u>Garage/ Lot</u>	<u>Availability</u>	<u>Navigation</u>	<u>Facility Condition</u>	<u>Safety And Security</u>	<u>Destination Convenience</u>	<u>Sign-up Ease</u>	<u>Cost of Parking</u>	<u>Overall</u>
Bethesda	2.79	2.91	2.76	2.92	3.12	2.77	2.23	2.79
Silver Spring	3.12	3.01	3.16	3.16	3.24	3.15	2.99	3.12
Wheaton	N/A – Only locations with 15 or more survey responses are shown							
Montgomery Hills	No Responses							
Average	2.96	2.97	2.97	3.04	3.18	2.93	2.63	2.96

For visitors, Silver Spring ranked higher than Bethesda across all 7 survey areas in FY16. Wheaton only had 3 visitor responses and Montgomery Hills had zero.

FY16 Visitor Satisfaction by Facility

<u>Garage/ Lot</u>	<u>Availability</u>	<u>Navigation</u>	<u>Facility Condition</u>	<u>Safety And Security</u>	<u>Destination Convenience</u>	<u>Pay Ease</u>	<u>Cost of Parking</u>	<u>Overall</u>
7	3.60	3.64	3.84	3.69	3.82	3.11	3.49	3.60
60	3.07	3.00	3.15	3.15	3.24	3.14	3.04	3.11
On-Street B	3.02	2.96	3.00	3.16	3.31	3.28	2.80	3.08
29	3.00	3.00	3.00	3.00	2.87	No Response	3.00	2.98
3	3.00	3.00	2.96	3.00	3.00	No Response	2.82	2.96
24	2.83	2.72	2.45	2.69	3.24	2.86	2.00	2.68
25	2.65	2.88	2.53	2.86	3.04	2.69	1.69	2.62
On-Street SS	2.66	2.09	2.38	2.66	2.81	No Response	2.34	2.49
49	2.09	2.56	2.34	2.31	2.48	2.31	2.16	2.32
5/55	N/A – Only locations with 15 or more survey responses are shown							
9								
11								
35								
42								
45								
Average	2.96	2.97	2.97	3.04	3.18	2.93	2.63	2.96

Key:

Bethesda
Silver Spring
Wheaton
Montgomery Hills

= Below Average Rating at a Statistically Significant Level
 = Above Average Rating at a Statistically Significant Level

Visitor Parkers - Customer Satisfaction by Facility

Facility Number	FY10	FY12	FY14	FY16	Change from FY14 to FY16
2	3.29	3.39	3.12		
3	3.06		3.37	2.96	-0.41 (-12%)
5/55	3.62	3.28	3.60		
7	3.03	3.55	3.39	3.60	+0.21 (+6%)
9			3.58		
11	3.79	3.59			
12	3.97	4.00			
13	3.52	3.10	3.53		
14	3.64		3.02		
24				2.68	
25		3.45	3.54	2.62	-0.92 (-26%)
29			3.20	2.98	-0.22 (-7%)
31	3.03	3.12			
35	3.01	3.60	3.51		
42	3.33	3.29			
45	3.55		3.21		
48	3.99	3.11	3.51		
49	3.50	3.37	3.45	2.32	-1.13 (-33%)
57	3.32		3.15		
58	2.75		3.43		
60	3.68	3.10	2.97	3.11	+0.14 (+5%)
On-Street Bethesda				3.08	
On-Street Silver Spring				2.49	

Of the 6 facilities with ratings in FY14 and FY16 for visitors, 4 declined and 2 improved. The largest improvement was for Garage 7 in Silver Spring, which already had a high overall rating. The largest decrease was for Garage 49 in Bethesda which dropped 33% between FY14 and FY16.

To maximize space on this page, the color key in not shown. The color key for this page is the same as page 38.



Pedestrian Survey Results

Ratings by Facility Characteristics

Facility Satisfaction Rankings by Occupancy

Permit Holders			
Garage/ Lot	Availability	Overall Average	Occupancy FY16
35	3.94	3.61	98%
49	2.52	2.36	93%
7	3.32	3.31	74%
14	2.48	2.44	69%
29	3.00	3.00	69%
11	3.01	2.86	65%
13	2.74	2.56	65%
60	3.25	3.10	59%
25	3.00	2.77	48%
48	3.00	2.58	47%
42	3.87	3.58	46%
45	2.96	2.81	35%
9	3.68	3.58	26%
12	3.00	2.53	12%
Average	3.01	2.86	57%

Visitor Parkers			
Garage/ Lot	Availability	Overall Average	Occupancy FY16
49	2.09	2.32	93%
7	3.60	3.60	74%
29	3.00	2.98	69%
3	3.00	2.96	67%
24	2.83	2.68	61%
60	3.07	3.11	59%
25	2.65	2.62	48%
On-Street B	3.02	3.08	N/A
On-Street SS	2.66	2.49	N/A
Average	2.96	2.96	57%

= Below Average Rating at a Statistically Significant Level
 = Above Average Rating at a Statistically Significant Level

Key:

Bethesda

Silver Spring

Wheaton

Montgomery Hills

Impact of Occupancy on Satisfaction – All Parkers

Availability of Parking					
Occupancy	Average	N	StdDev	Difference	p-value
<50%	3.18	330	0.62		
50-75%	3.02	521	0.53	-0.15	0.00
76-100%	2.65	183	0.84	-0.53	0.00

Feeling of Safety					
Occupancy	Average	N	StdDev	Difference	p-value
<50%	3.15	330	0.70		
50-75%	2.95	521	0.66	-0.20	0.00
76-100%	2.61	183	0.86	-0.54	0.00

Ease of Navigation					
Occupancy	Average	N	StdDev	Difference	p-value
<50%	3.01	330	0.77		
50-75%	2.82	521	0.67	-0.18	0.00
76-100%	2.66	183	0.73	-0.34	0.00

Convenience to Destination					
Occupancy	Average	N	StdDev	Difference	p-value
<50%	3.34	319	0.71		
50-75%	3.23	512	0.58	-0.11	0.01
76-100%	2.97	182	0.87	-0.37	0.00

Facility Condition					
Occupancy	Average	N	StdDev	Difference	p-value
<50%	3.01	330	0.80		
50-75%	2.99	521	0.62	-0.02	0.36
76-100%	2.32	183	0.91	-0.70	0.00

- = Avg. Rating Lower than <50% Occupancy at a Statistically Significant Level
- = Avg. Rating Higher than <50% Occupancy at a Statistically Significant Level

Across all parking districts and survey respondents, those in facilities with lower average occupancy rates had higher satisfaction ratings. There are exceptions such as garages 7 (Silver Spring) and 35 (Bethesda) with high occupancy rates and high satisfaction scores for availability.

Facility Satisfaction Rankings: Above/Below Grade

Permit Holders					
Garage/Lot	Navigation	Facility Condition	Safety and Security	Overall	Above or Below Grade
7	3.34	3.70	3.50	3.31	Above
9	3.60	3.80	3.73	3.58	Above
11	2.55	2.78	2.81	2.86	Above
12	2.33	2.00	2.73	2.53	Above
13	2.21	2.57	2.50	2.56	Above
14	2.13	2.61	2.26	2.44	Above
25	3.07	2.51	2.91	2.77	Above
29	3.00	3.00	3.00	3.00	Above
35	3.78	3.78	4.00	3.61	Above
45	2.51	2.85	2.97	2.81	Above
48	2.14	2.34	2.59	2.58	Above
60	3.17	2.96	2.96	3.10	Above
42	3.87	3.87	3.80	3.58	Below
49	2.45	1.98	2.39	2.36	Below
Average	2.76	2.81	2.91	2.86	

Visitor Parkers					
Garage/Lot	Navigation	Facility Condition	Safety And Security	Overall	Above or Below Grade
3	3.00	2.96	3.00	2.96	Above
7	3.64	3.84	3.69	3.60	Above
24	2.72	2.45	2.69	2.68	Above
25	2.88	2.53	2.86	2.62	Above
29	3.00	3.00	3.00	2.98	Above
60	3.00	3.15	3.15	3.11	Above
On-Street B	2.96	3.00	3.16	3.08	Above
On-Street SS	2.09	2.38	2.66	2.49	Above
49	2.56	2.34	2.31	2.32	Below
Average	2.97	2.97	3.04	2.96	

= Below Average Rating at a Statistically Significant Level
 = Above Average Rating at a Statistically Significant Level

Key: Bethesda Silver Spring Wheaton Montgomery Hills

Impact of Grade on Satisfaction – All Parkers

Availability of parking					
Grade	Average	N	StdDev	Difference	p-value
Above	3.04	926	0.56		
Below	2.80	212	0.89	-0.24	0.00

Feeling of Safety					
Grade	Average	N	StdDev	Difference	p-value
Above	3.00	924	0.67		
Below	2.74	212	0.90	-0.26	0.00

Ease of Navigation					
Grade	Average	N	StdDev	Difference	p-value
Above	2.83	925	0.69		
Below	2.83	212	0.82	0.00	0.48

Convenience to Destination					
Grade	Average	N	StdDev	Difference	p-value
Above	3.23	906	0.64		
Below	3.11	211	0.87	-0.12	0.03

Facility Condition					
Grade	Average	N	StdDev	Difference	p-value
Above	2.94	926	0.67		
Below	2.53	212	1.02	-0.41	0.00

- = Avg. Rating Lower than Above Grade at a Statistically Significant Level
- = Avg. Rating Higher than Above Grade at a Statistically Significant Level

With the exception of ease of navigation, parkers in below grade structures were less satisfied as compared to those in above grade facilities. This was a reversal of the results from the FY14 survey. The change was largely due to a large drop in satisfaction scores for underground Garage 49, which went from 3.45 in FY14 to 2.32 in FY16 (-33%).

Facility Satisfaction Rankings: Parking Rates

Permit Holders			
Garage/Lot	Cost of Parking	Overall	Rate
12	2.20	2.53	\$0.50
48	2.45	2.58	\$0.50
7	2.88	3.31	\$0.70
9	2.84	3.58	\$0.70
13	2.37	2.56	\$0.75
14	2.64	2.44	\$0.75
45	2.36	2.81	\$0.75
11	2.84	2.86	\$0.80
29	3.00	3.00	\$0.80
35	2.61	3.61	\$0.80
42	2.31	3.58	\$0.80
49	1.83	2.36	\$0.80
60	2.75	3.10	\$1.00
25	2.07	2.77	\$1.25
Average	2.43	2.86	

Visitor Parkers			
Garage/ Lot	Cost of Parking	Overall	Rate
7	3.49	3.60	\$0.70
3	2.82	2.96	\$0.80
29	3.00	2.98	\$0.80
49	2.16	2.32	\$0.80
60	3.04	3.11	\$1.00
On-Street SS	2.34	2.49	\$1.00
24	2.00	2.68	\$1.25
25	1.69	2.62	\$1.25
On-Street B	2.80	3.08	\$2.00
Average	2.63	2.96	

= Below Average Rating at a Statistically Significant Level
 = Above Average Rating at a Statistically Significant Level

Key:

Bethesda	Silver Spring	Wheaton	Montgomery Hills
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Facility Satisfaction Rankings by Payment System

Permit Holders

Garage/Lot	Sign-up Ease	Cost of Parking	Overall	Payment System
49	2.44	1.83	2.36	Cashier
9	3.56	2.84	3.58	Meter
12	No Response	2.20	2.53	Meter
13	2.50	2.37	2.56	Meter
14	2.00	2.64	2.44	Meter
25	2.93	2.07	2.77	Meter
29	No Response	3.00	3.00	Meter
35	3.38	2.61	3.61	Meter
42	3.48	2.31	3.58	Meter
48	No Response	2.45	2.58	Meter
7	2.60	2.88	3.31	Pay-by-Space
45	2.80	2.36	2.81	Pay-by-Space
11	No Response	2.84	2.86	Pay-on-Foot
60	3.50	2.75	3.10	Pay-on-Foot
Average	2.87	2.43	2.86	

Visitor Parkers

Garage/Lot	Pay Ease	Cost of Parking	Overall	Payment System
49	2.31	2.16	2.32	Cashier
3	No Response	2.82	2.96	Meter
24	2.86	2.00	2.68	Meter
25	2.69	1.69	2.62	Meter
29	No Response	3.00	2.98	Meter
On-Street B	3.28	2.80	3.08	Meter
On-Street SS	No Response	2.34	2.49	Meter
7	3.11	3.49	3.60	Pay-by-Space
60	3.14	3.04	3.11	Pay-on-Foot
Average	2.93	2.63	2.96	

= Below Average Rating at a Statistically Significant Level
 = Above Average Rating at a Statistically Significant Level

Key:

Bethesda

Silver Spring

Wheaton

Montgomery Hills

Impact of Payment System on Satisfaction – All Parkers

Cost of Parking					
Payment	Average	N	StdDev	Difference*	p-value
Meter	2.44	614	0.78		
Cashier	1.90	156	0.65	-0.55	0.00
Pay-by-Space	2.84	162	0.90	0.40	0.00
Pay-on-Foot	2.91	181	0.48	0.46	0.00

Ease of Payment/ Ease of Sign-up					
Payment	Average	N	StdDev	Difference*	p-value
Meter	3.11	280	0.79		
Cashier	2.41	156	0.70	-0.70	0.00
Pay-by-Space	2.88	88	1.05	-0.24	0.03
Pay-on-Foot	3.15	72	0.49	0.04	0.29

*Compared to metered facilities

Cost of Parking**					
Credit?	Average	N	StdDev	Difference	p-value
Yes	2.58	603	0.80		
No	2.41	510	0.79	-0.17	0.00

Ease of Payment**					
Credit?	Average	N	StdDev	Difference	p-value
Yes	2.74	334	0.84		
No	3.10	262	0.80	0.36	0.00

Note: The credit card “yes/no” field is based on the **ability to use a credit card in the facility. The current survey does not capture the method of payment for visitors.

■ = Avg. Rating Lower than Meter at a Statistically Significant Level
■ = Avg. Rating Higher than Meter at a Statistically Significant Level

Only one lot, Lot 49 in Bethesda, uses a cashier and it had lower satisfaction as compared to facilities with other payment methods.

Pay-by-space and pay-on-foot had the highest satisfaction for cost of parking. Pay-on-foot and meters had the highest satisfaction when it came to ease of payment.

When able to pay with a credit card, the cost of parking was perceived slightly better than not able to use one. The opposite was true for ease of payment where facilities without credit cards were considered easier to pay.

Impact of Proximity to Destination on Satisfaction – All Parkers

Feeling of Safety					
Blocks away	Average	N	StdDev	Difference	p-value
1 or less	3.08	540	0.74		
2	2.75	381	0.67	-0.33	0.00
3	2.84	132	0.69	-0.24	0.00
4+	3.17	65	0.70	0.09	0.18

Ease of Payment/ Ease of Sign-up					
Blocks away	Average	N	StdDev	Difference	p-value
1 or less	2.98	362	0.83		
2	2.69	149	0.80	-0.28	0.00
3	2.72	39	0.92	-0.26	0.05
4+	3.13	38	0.78	0.16	0.12

Convenience to Destination					
Blocks away	Average	N	StdDev	Difference	p-value
1 or less	3.33	535	0.74		
2	3.03	373	0.63	-0.30	0.00
3	3.15	128	0.60	-0.18	0.00
4+	3.31	64	0.56	-0.02	0.41

Cost of Parking					
Blocks away	Average	N	StdDev	Difference	p-value
1 or less	2.46	536	0.88		
2	2.48	373	0.73	0.01	0.41
3	2.60	127	0.63	0.13	0.02
4+	2.71	62	0.80	0.25	0.01

= Avg. Rating Lower than 1 block or less at a Statistically Significant Level
 = Avg. Rating Higher than 1 block or less at a Statistically Significant Level

For permit and visitor parkers, those travelling one block or less have higher satisfaction with safety, ease of payment and convenience as opposed to those parkers travelling farther.

When it comes to the cost of parking, those travelling further found more value in the cost of parking. In the FY14 survey, cost of parking did not vary based on the respondent's distance to final destination.

Impact of Proximity to Destination on Satisfaction –

Permit Parkers

Feeling of Safety

Blocks away	Average	N	StdDev	Difference	p-value
1 or less	3.08	358	0.79		
2	2.65	262	0.67	-0.43	0.00
3	2.86	83	0.61	-0.23	0.00
4+	3.04	27	0.65	-0.04	0.37

Ease of Sign-up

Blocks away	Average	N	StdDev	Difference	p-value
1 or less	2.98	222	0.88		
2	2.56	84	0.83	-0.42	0.00
3	N/A – Too Few Responses				
4+	N/A – Too Few Responses				

Convenience to Destination

Blocks away	Average	N	StdDev	Difference	p-value
1 or less	3.36	353	0.76		
2	3.05	255	0.59	-0.31	0.00
3	3.20	80	0.58	-0.16	0.02
4+	3.15	26	0.61	-0.21	0.05

Cost of Parking

Blocks away	Average	N	StdDev	Difference	p-value
1 or less	2.43	354	0.86		
2	2.41	254	0.68	-0.02	0.39
3	2.53	78	0.60	0.10	0.11
4+	2.33	24	0.64	-0.09	0.25

- = Avg. Rating Lower at a Statistically Significant Level
- = Avg. Rating Higher at a Statistically Significant Level

The connections between distance and satisfaction with safety, ease of payment and convenience for permit parkers was in line with what was found in the FY14 survey. The further away the destination, the lower the satisfaction except for the cost of parking which was not affected.

Impact of Proximity to Destination on Satisfaction – Visitor Parkers

Feeling of Safety					
Blocks away	Average	N	StdDev	Difference	p-value
1 or less	3.09	182	0.62		
2	2.97	119	0.60	-0.11	0.06
3	2.81	49	0.82	-0.28	0.01
4+	3.26	38	0.72	0.18	0.08

Convenience to Destination					
Blocks away	Average	N	StdDev	Difference	p-value
1 or less	3.27	182	0.70		
2	3.01	118	0.71	-0.27	0.00
3	3.06	48	0.63	-0.21	0.02
4+	3.42	38	0.50	0.15	0.06

Ease of Payment					
Blocks away	Average	N	StdDev	Difference	p-value
1 or less	2.96	140	0.74		
2	2.86	65	0.75	-0.10	0.18
3	2.77	30	0.86	-0.20	0.12
4+	3.06	34	0.78	0.09	0.26

Cost of Parking					
Blocks away	Average	N	StdDev	Difference	p-value
1 or less	2.54	182	0.91		
2	2.62	119	0.80	0.08	0.20
3	2.71	49	0.68	0.18	0.07
4+	2.95	38	0.80	0.41	0.00

 = Avg. Rating Lower at a Statistically Significant Level
 = Avg. Rating Higher at a Statistically Significant Level

Feeling of safety was slightly lower for visitor parkers the further they were from their destination, but the result was only significantly different for those walking 3 blocks.

Not surprisingly, those walking further than one block found the convenience to final destination to be lower. The exception was the 4+ blocks group which was similar to the one block group.