

# Understanding the Choice to Reside in a Transit-Oriented Development

*presented to*

**MTC Planning Committee**

**January 9, 2009**



*presented by*

**Valerie Knepper, MTC**

**Chris Wornum, Cambridge Systematics**

**CAMBRIDGE**  
SYSTEMATICS

# Agenda

- **Background**
- **Survey Findings – Market Segments amenable to TOD**
- **Follow Up Questions for Key Market Segments**
- **Workshops on Potential Policies**
- **Your Comments and Questions**

# Survey Findings - Six Important Attitude Factors

## Statistical analysis of 900 responses to 30 questions

- **Transit accessibility**
  - Easily commute using transit
- **Quiet and clean neighborhood**
  - Quiet street, clean neighborhood that feels safe walking at night
- **Driving orientation**
  - Having my own garage with easy access to a freeway
- **School quality**
  - Living in a school district that provides a good education and being able to safely walk to schools
- **San Francisco access**
  - Living within an easy transit ride to downtown San Francisco
- **Travel minimization**
  - Near quick and reliable public transit, I do not frequently need a car

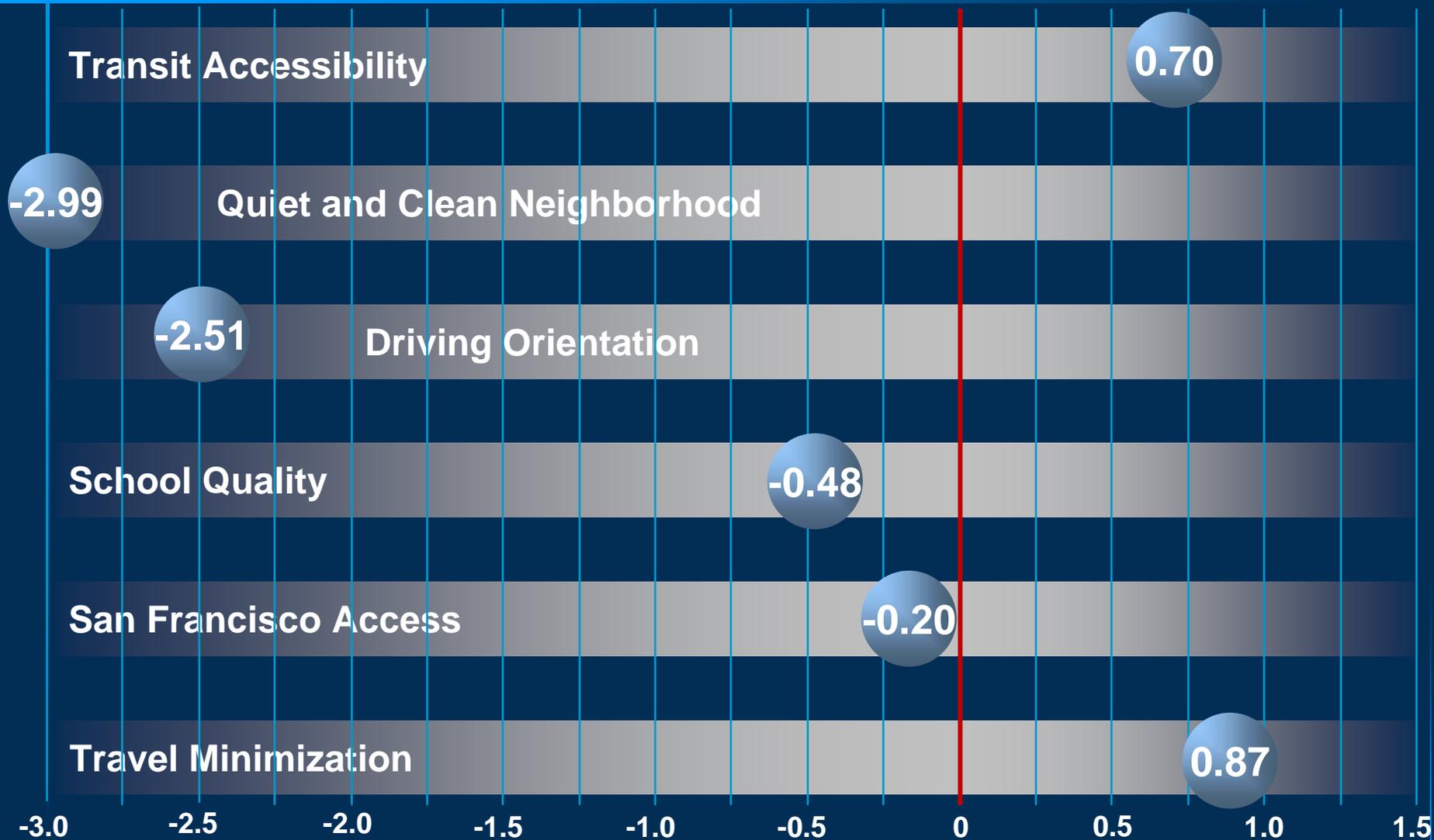
# Defining Market Segments

- **Eight market segments emerged, based on statistical analysis of six attitude factors**
- **Demographic data (added to assist understanding):**
  - **Age**
  - **Education**
  - **Income**
  - **Household size**
  - **Vehicle ownership**
- **Names are only to assist in understanding groups – can be modified**

# Market Segment 1

## *Transit Preferring*

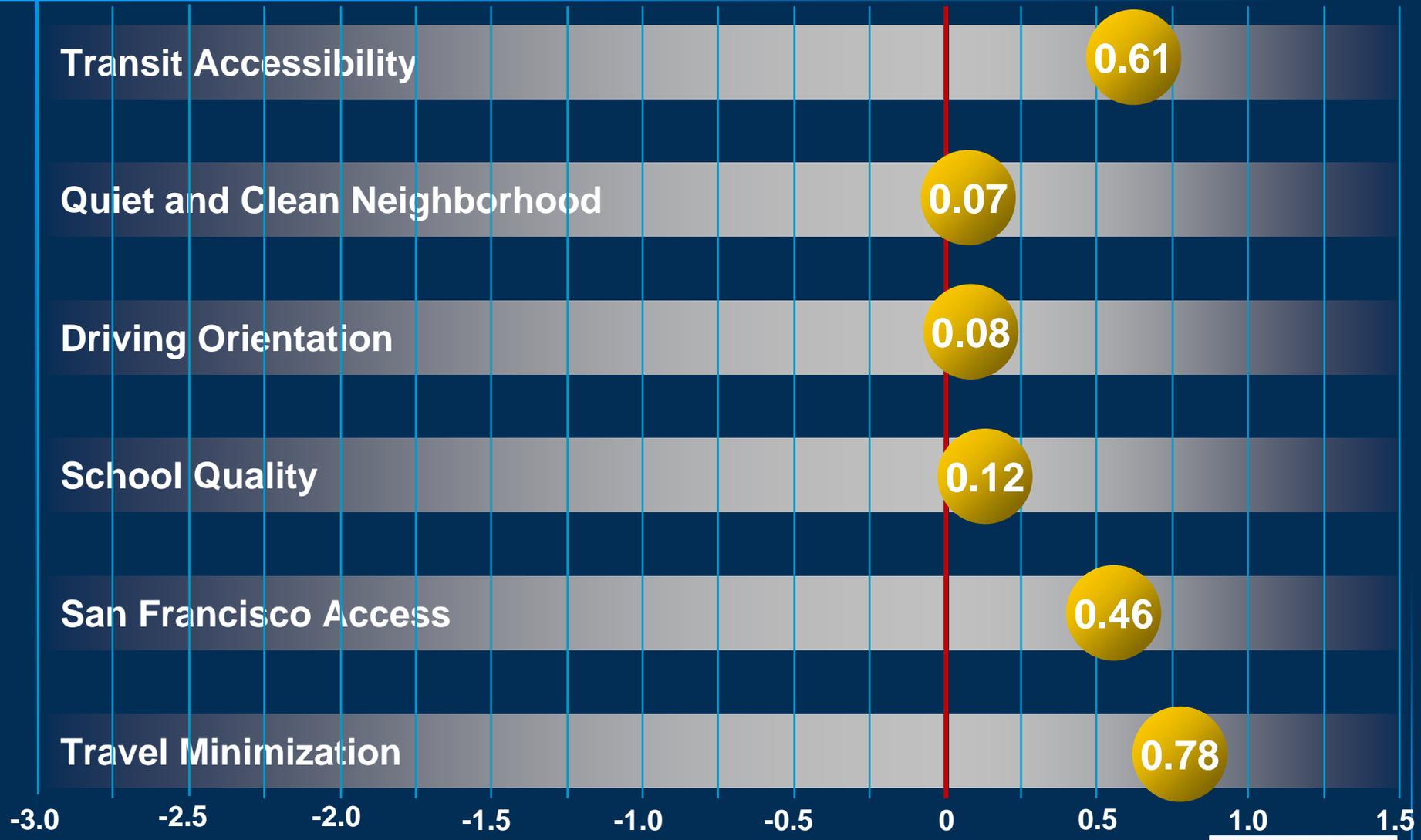
1



# Market Segment 2

## *Young Brainiacs*

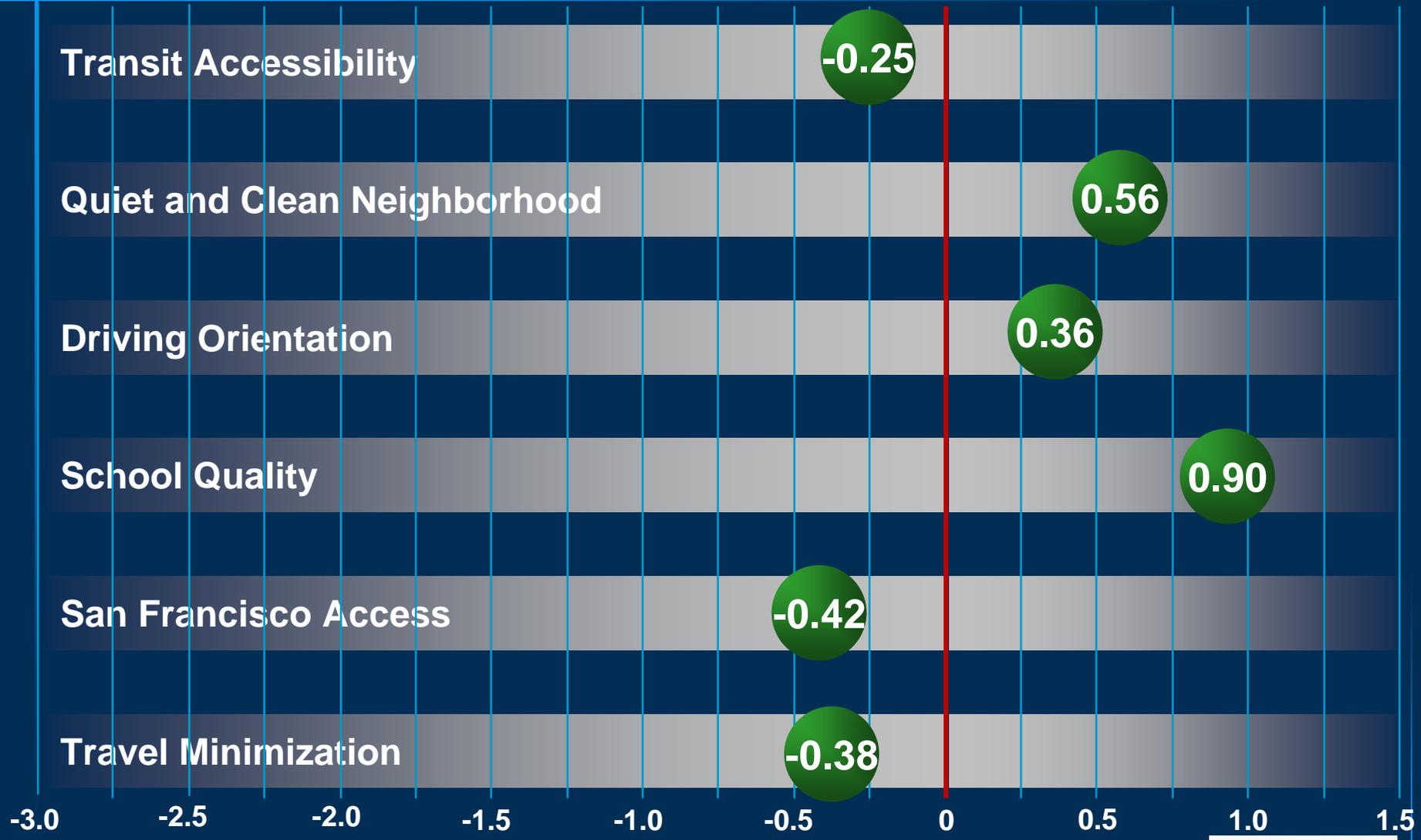
2



# Market Segment 3

## *Kids, Cars & Schools (KCS)*

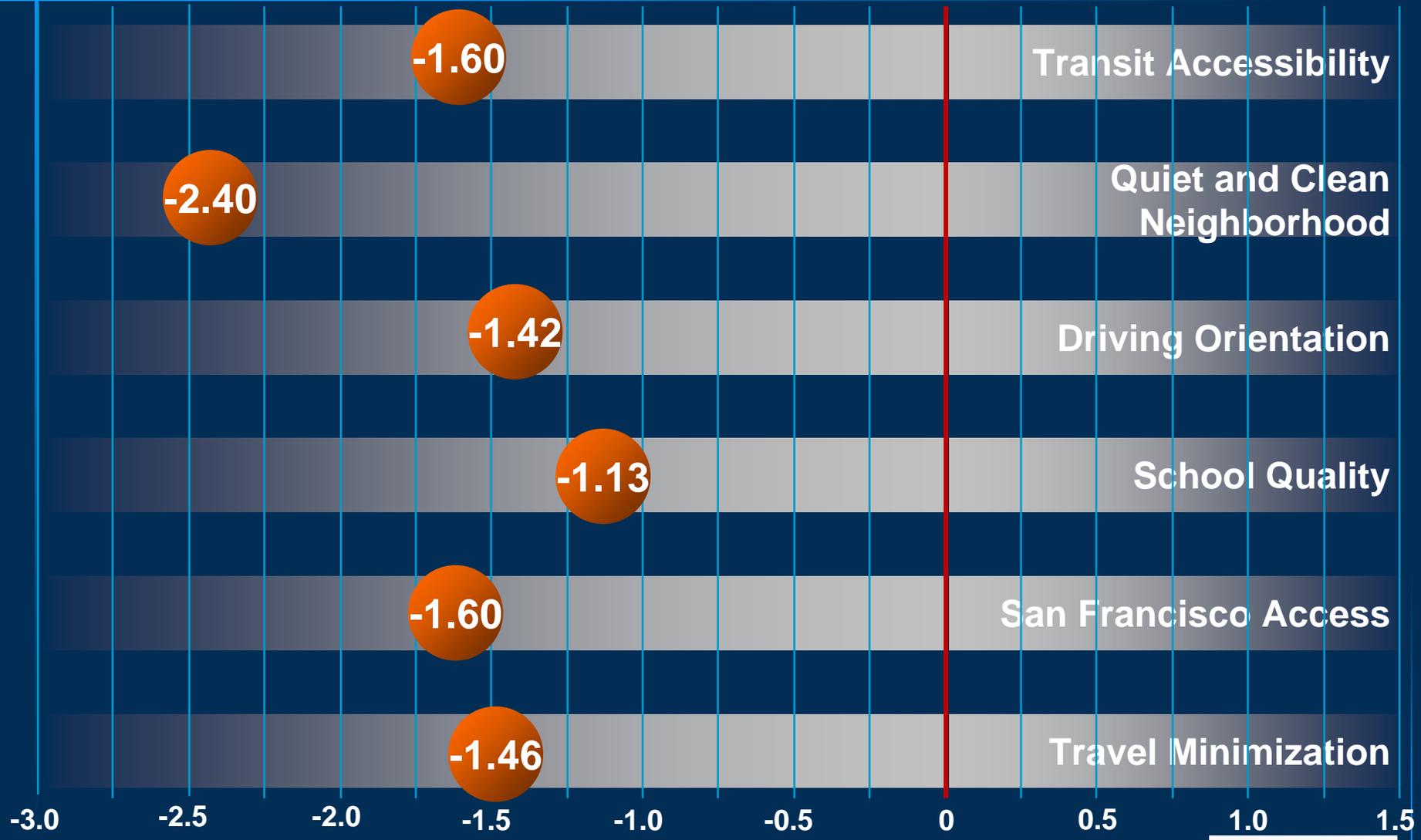
3



# Market Segment 4

## *Price Conscious Auto Oriented*

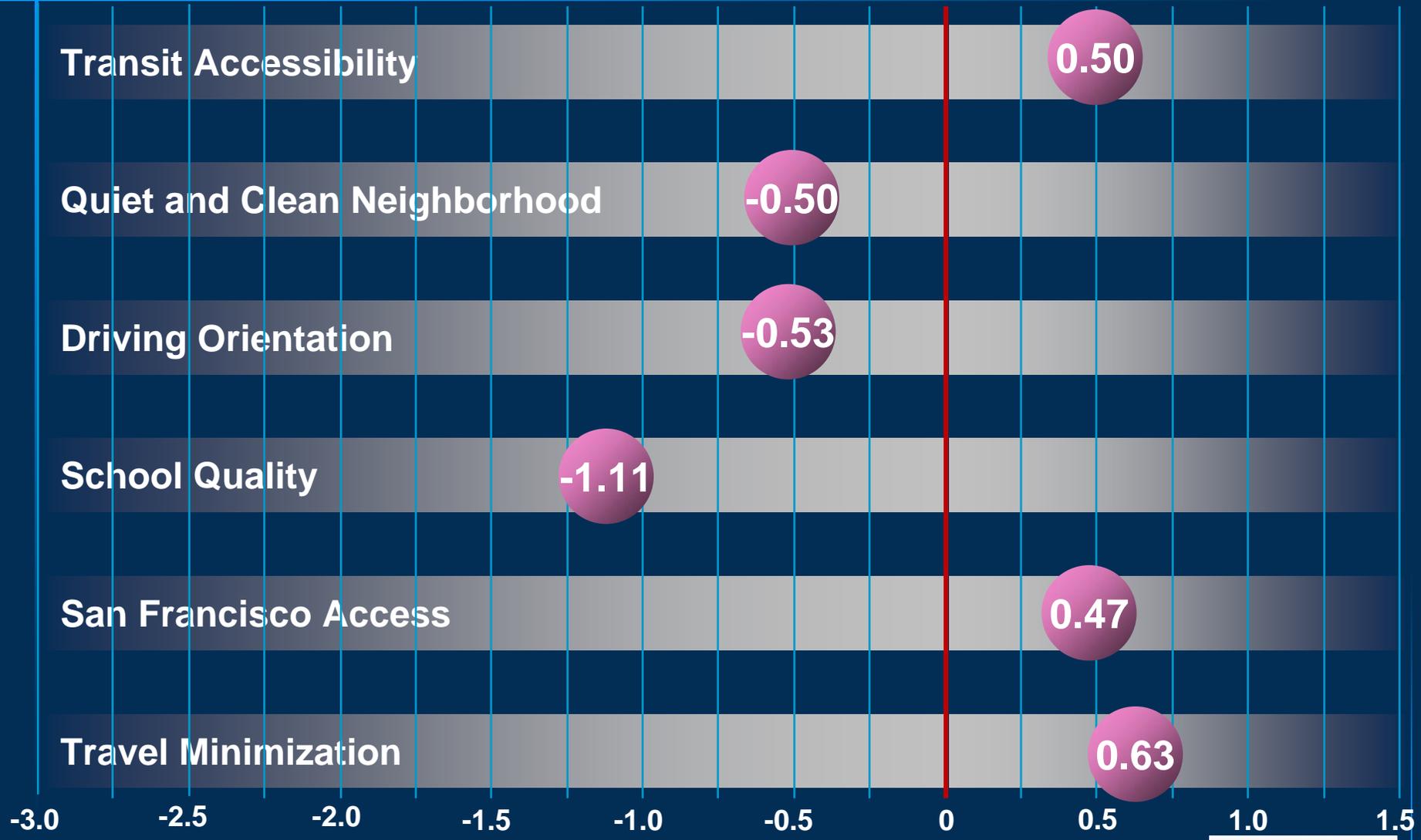
4



# Market Segment 5

*Urban DINKs (Double Income No Kids)*

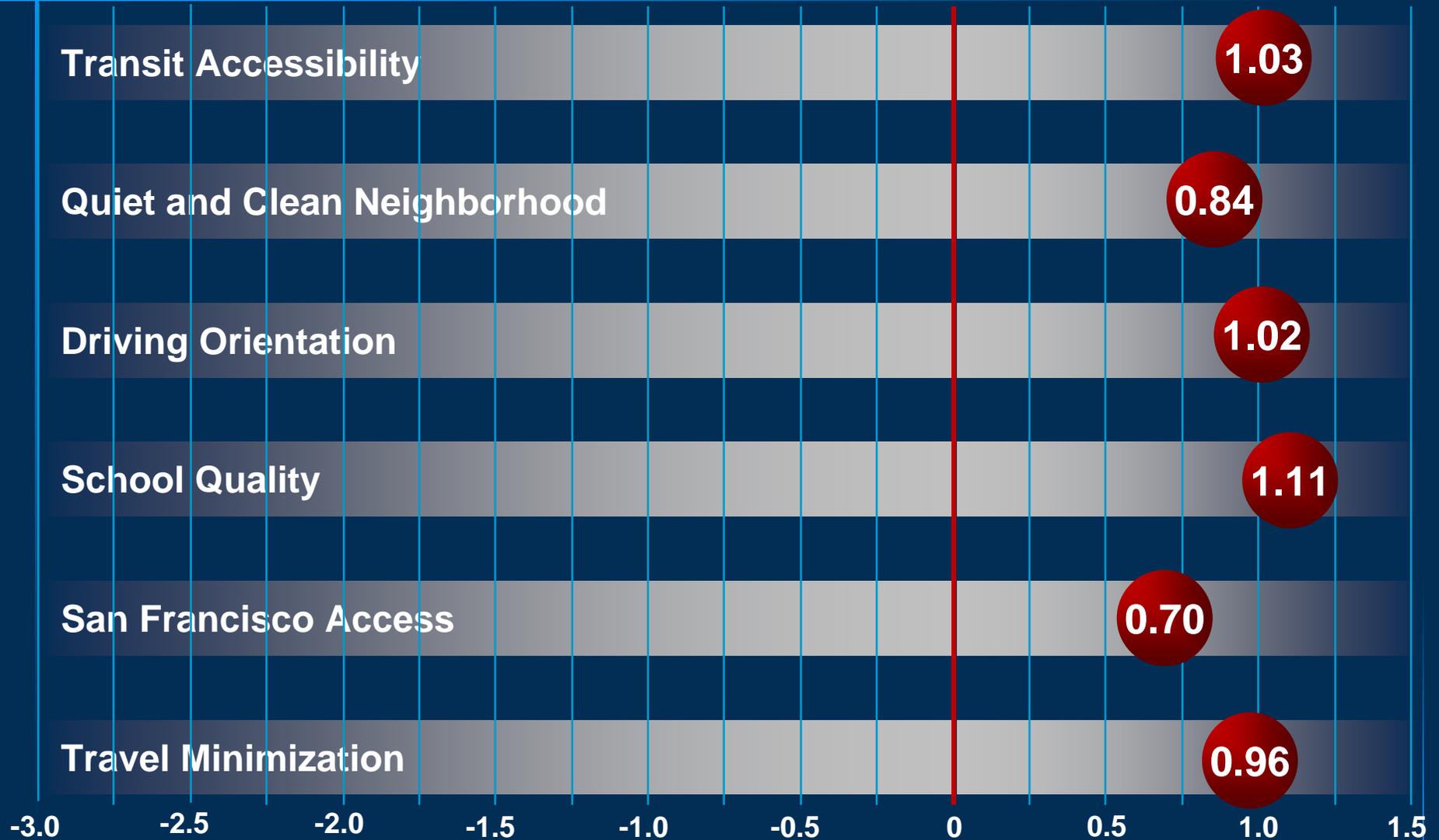
5



# Market Segment 6

## *Ambitious Urbanites*

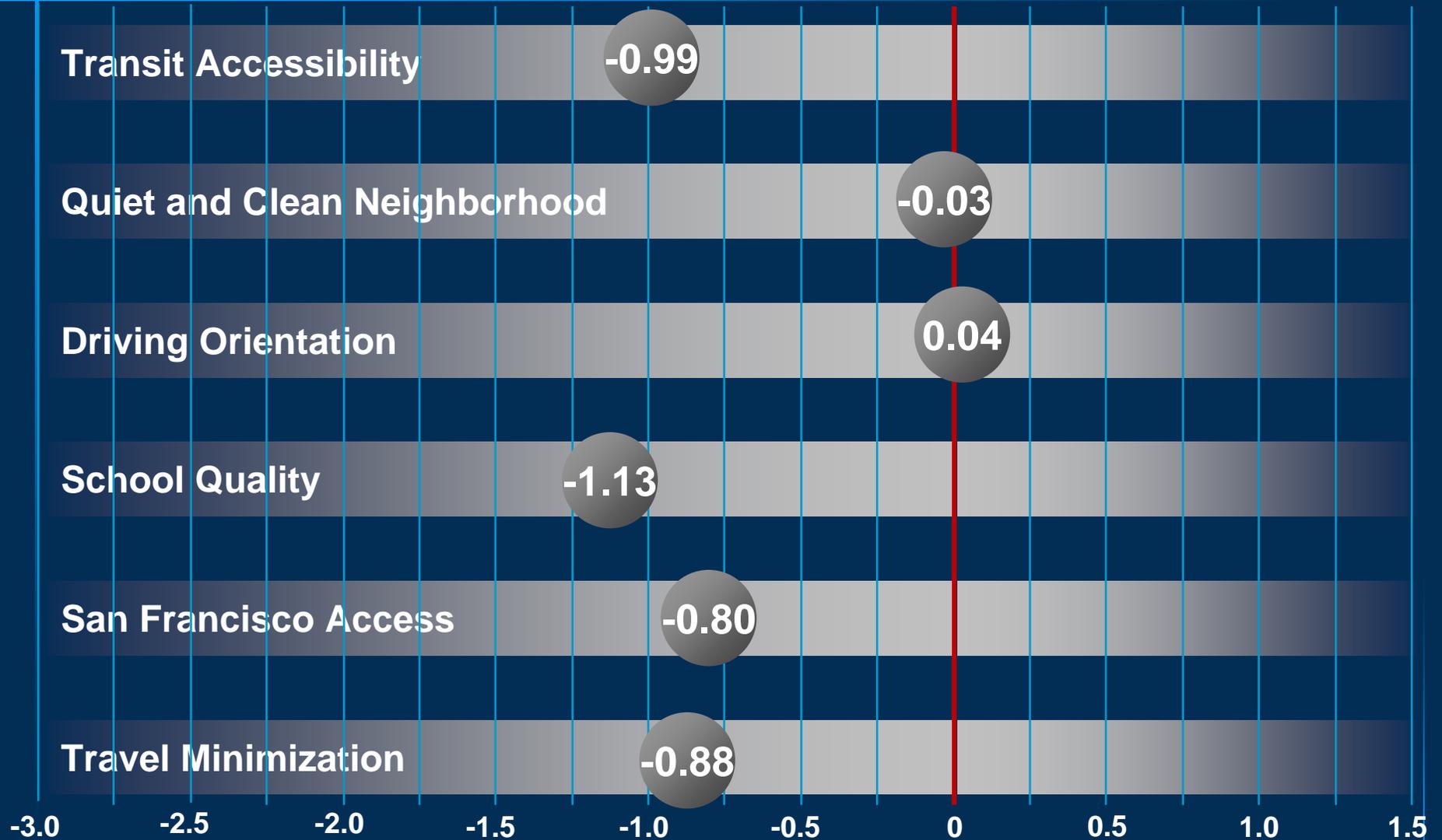
6



# Market Segment 7

## *Empty Nesters*

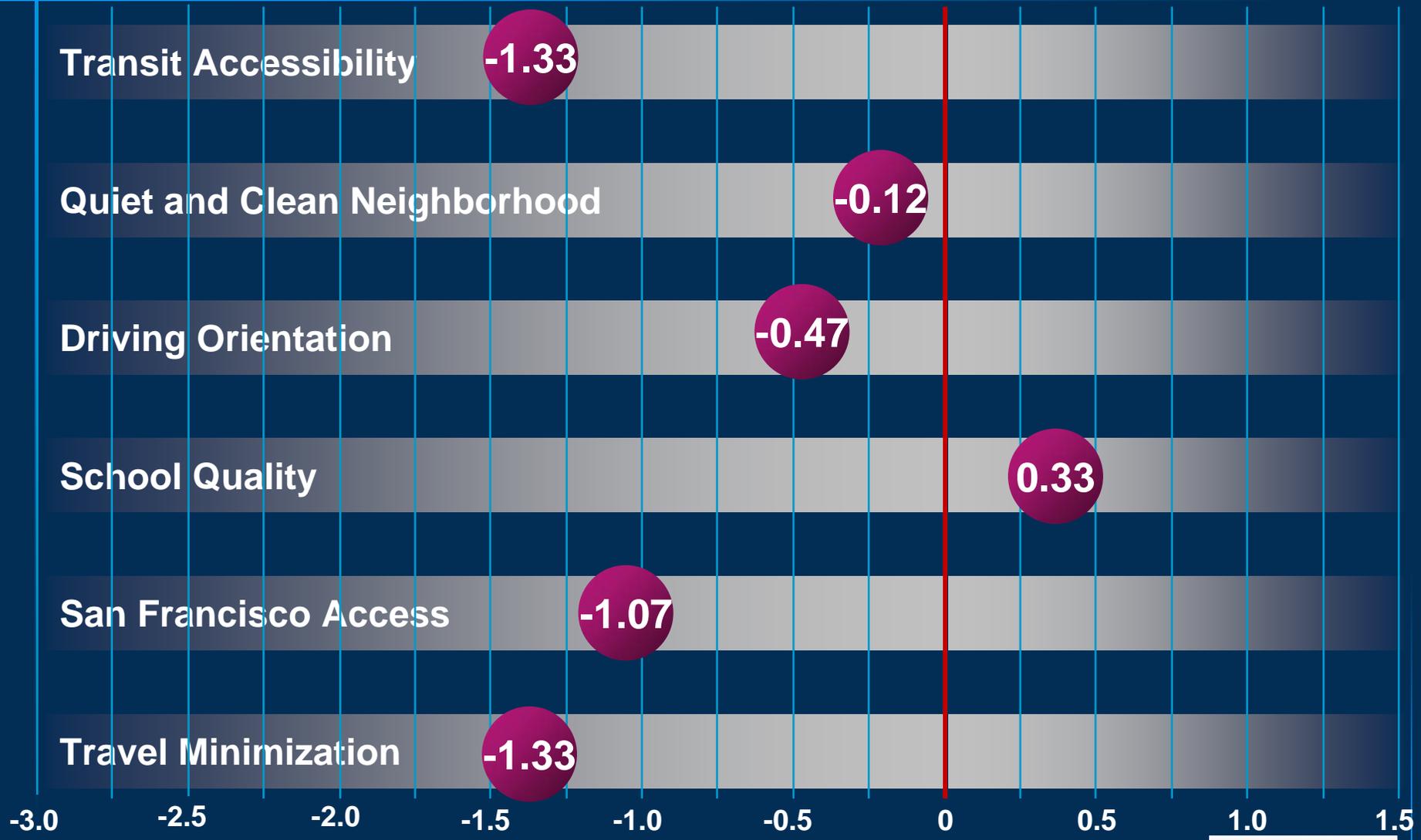
7



# Market Segment 8

## High Income Suburbanites

8



# Market Segments Amenable to TOD

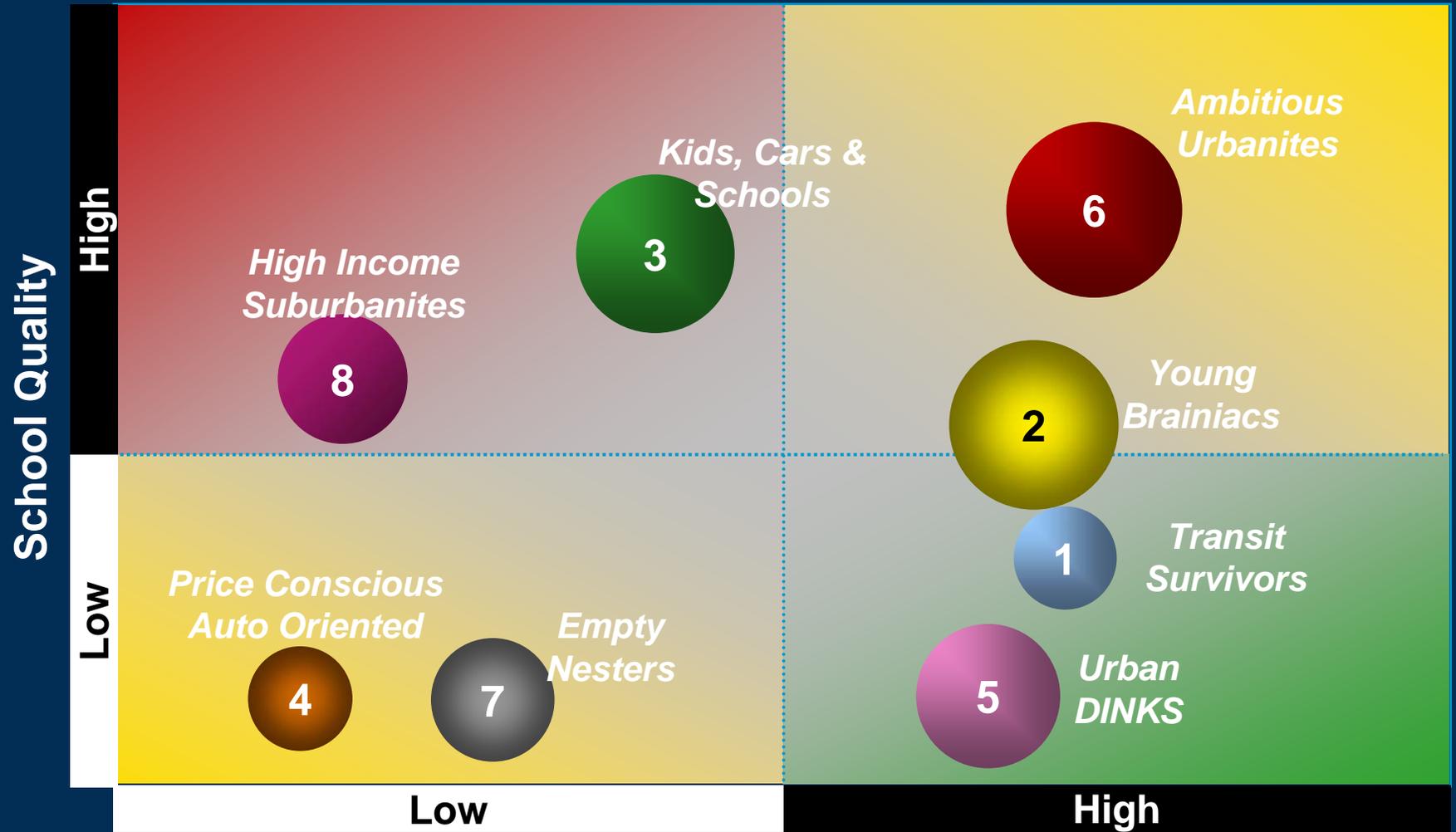
## Already very oriented toward TOD

- Segment 1- *Transit Preferring*
- Segment 5 - *Urban DINKS*

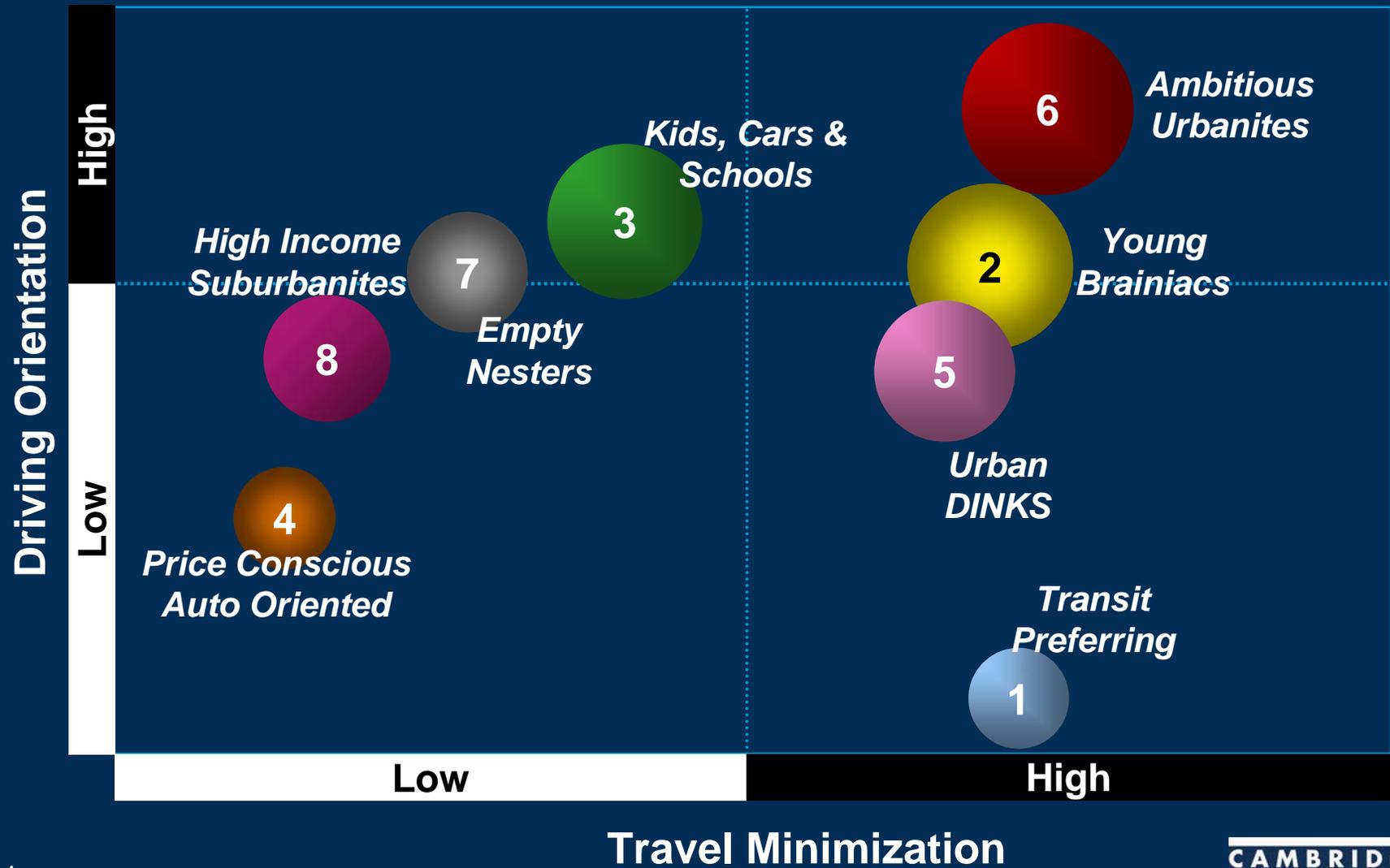
## High Potential – Three Segments

- Market Segment 2 - *Young Brainiacs*
- Market Segment 6 - *Ambitious Urbanites*
- Market Segment 7 – *Empty Nesters*

# Travel Minimization vs. School Quality



# Travel Minimization vs. Driving Orientation



# Task 8 Questionnaire

## Follow-up with Members of Key Market Segments

Follow-up questionnaire - concerns with TOD, policies to address for likely market segments

- Improve understanding of the housing and travel choices
- Improve our understanding of the relative value of various public policies to make TOD more attractive
- Document personal stories

# Workshop Planning Overview

- Envision 8-12 people each, two workshops
- Geographic area to target
  - One in East Bay
  - One in South Bay
- Timeframe: late February/March 2009

# Background Slides

# Transit Accessibility Seven Statements

Easily commute using transit

100%

Easy access to local bus or MUNI

93.9%

Neighborhood where transit is reliable

91.0%

Easy drive to BART

63.0%

Easy access to commuter rail

59.0%

Neighborhood that offers a mix of housing types

41.8%

Despite quick and reliable public transit, frequently need a car

-39.0%

# Neighborhood Amenity Five Statements

Quiet street

100%

Clean neighborhood

98.0%

Neighborhood where I felt safe walking at night

89.4%

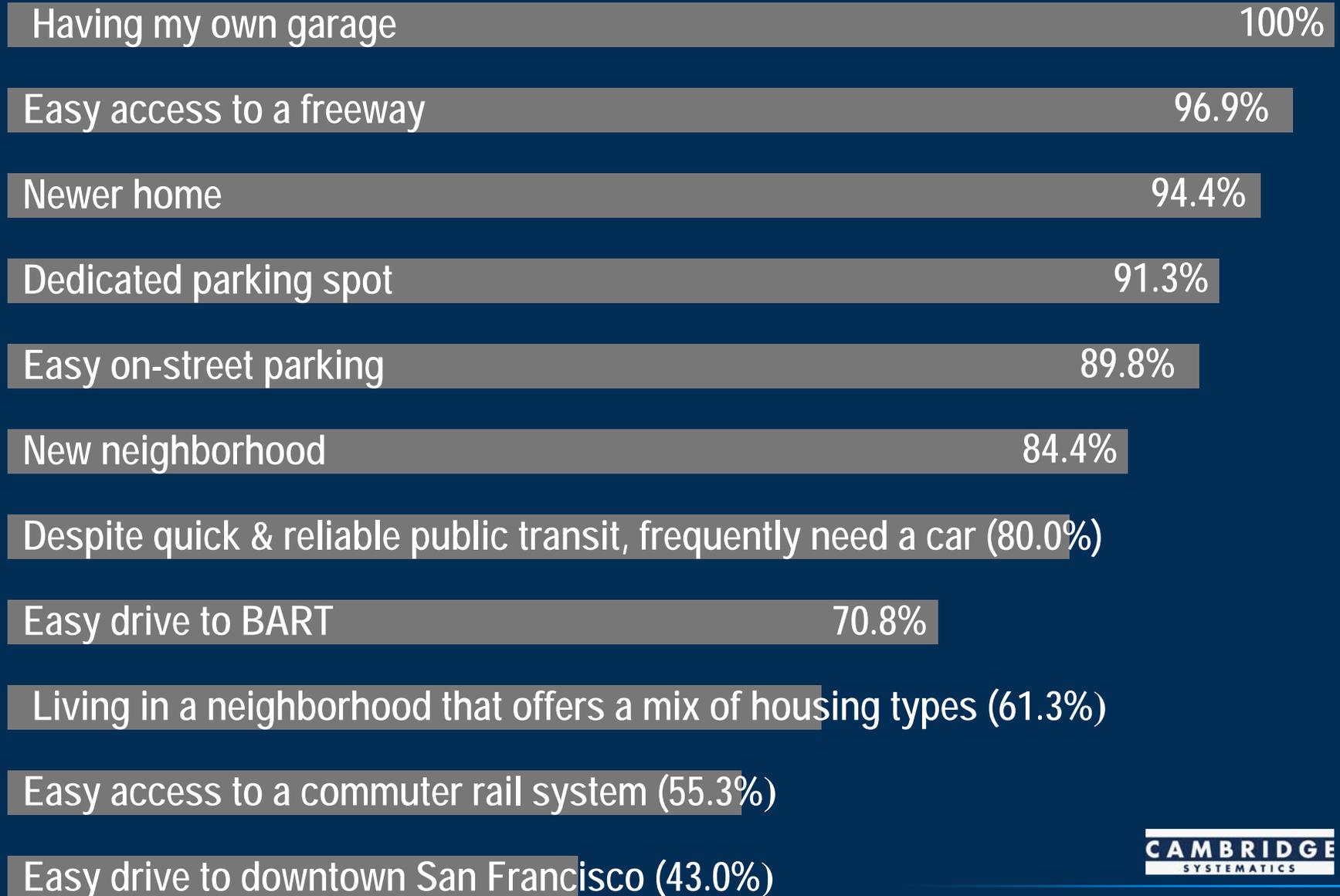
Having pleasant public parks nearby

71.5%

Neighborhood where there are places to spend time

63.5%

# Driving Orientation Eleven Statements



# School Quality Three Statements

Living in a school district that provides a good education

100%

Being able to safely walk to schools

97.8%

Pleasant public parks nearby where family or pets can safely play

23.6%

# San Francisco Access Statements

## Three Statements

Living within an easy transit ride to downtown San Francisco

100%

Living in San Francisco

56.3%

Living within an easy drive to downtown San Francisco

55.2%

# Travel Minimization Nine Statements

Even near quick and reliable public transit, I frequently need a car (-100%)

Having only one or fewer dedicated parking spots is sufficient (-86%)

Living in a neighborhood that offers a mix of housing types (-80%)

Having my own garage (-66%)

Living within a short commute to work (-62%)

Safe & convenient neighborhood to walk or bike for errands (54%)

Being able to safely walk to schools (52%)

Dedicated parking spot (50%)

Neighborhood where there are places to spend time (41%)