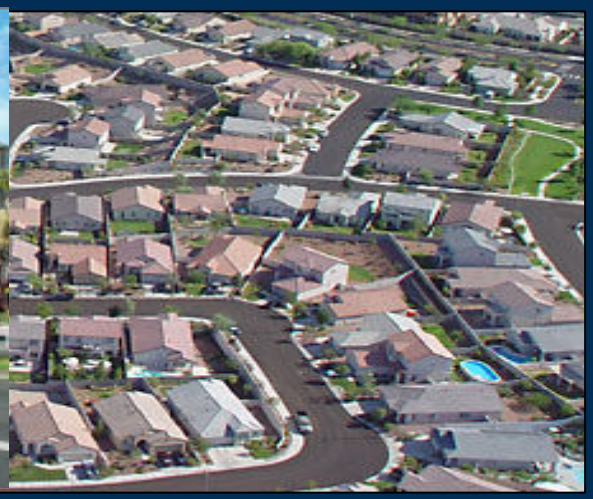
Understanding the Choice to Reside in a Transit-Oriented Development

presented to

MTC Planning Committee

October 9, 2009



presented by

Valerie Knepper, MTC

Chris Wornum, Cambridge Systematics

CAMBRIDGE SYSTEMATICS

Presentation Summary

- Study Purpose, Methods and Process
- Survey Findings – Market Segments amenable to TOD
- Using results to address issues - Policy packages
- Examples to demonstrate process – 3 steps
- Your Comments and Questions

CAMBRIDGE SYSTEMATICS

Understanding the Market for TOD

Demand Should Drive Supply

Housing Choice Criteria (*What people want*)	Supply Characteristics (*Neighborhood Attributes*)
Feel safe walking at night	People walking, restaurants
Enjoy walking to errands	Retail and residential density
Shorter commute	Proximity to transit to jobs, pedestrian access
Schools, places to play	Proximity to schools, parks

CAMBRIDGE SYSTEMATICS

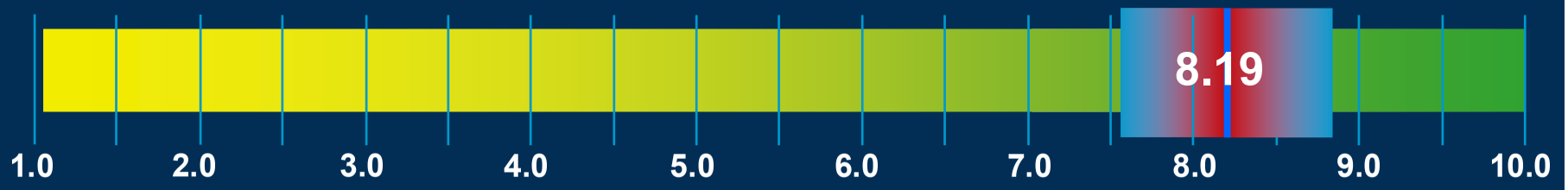
Survey results:
Six Key Attitudes Shape Neighborhood Choice

- Travel minimization / mixed land use
- Quiet and clean neighborhood
- Transit accessibility
- Driving orientation
- School quality
- San Francisco access

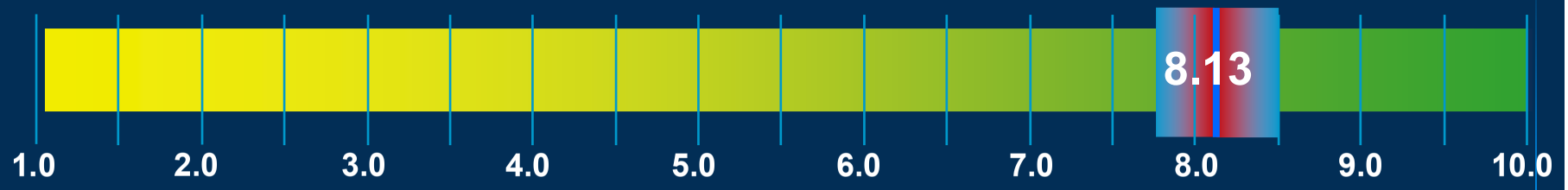
CAMBRIDGE SYSTEMATICS

Overall Finding: Safe & Convenient Walking & Bicycling
Vital for Attracting Most Market Segments

- *Having a neighborhood where I feel safe enough walking at night* - highest-rated statement on average, almost universally valued

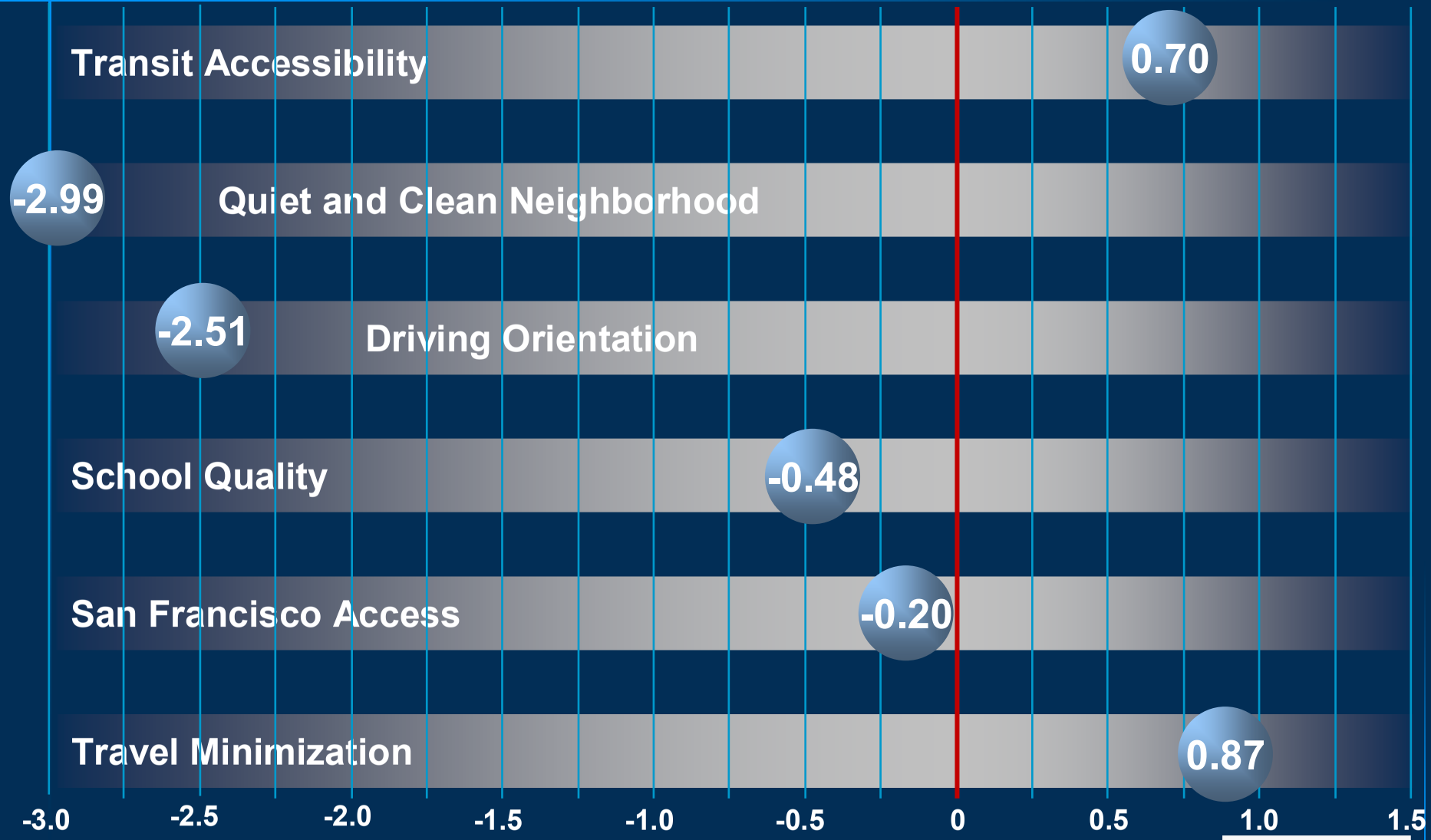


- *Having a neighborhood where it is safe and convenient to walk and bicycle for errands* was the second highest rated statement



CAMBRIDGE SYSTEMATICS

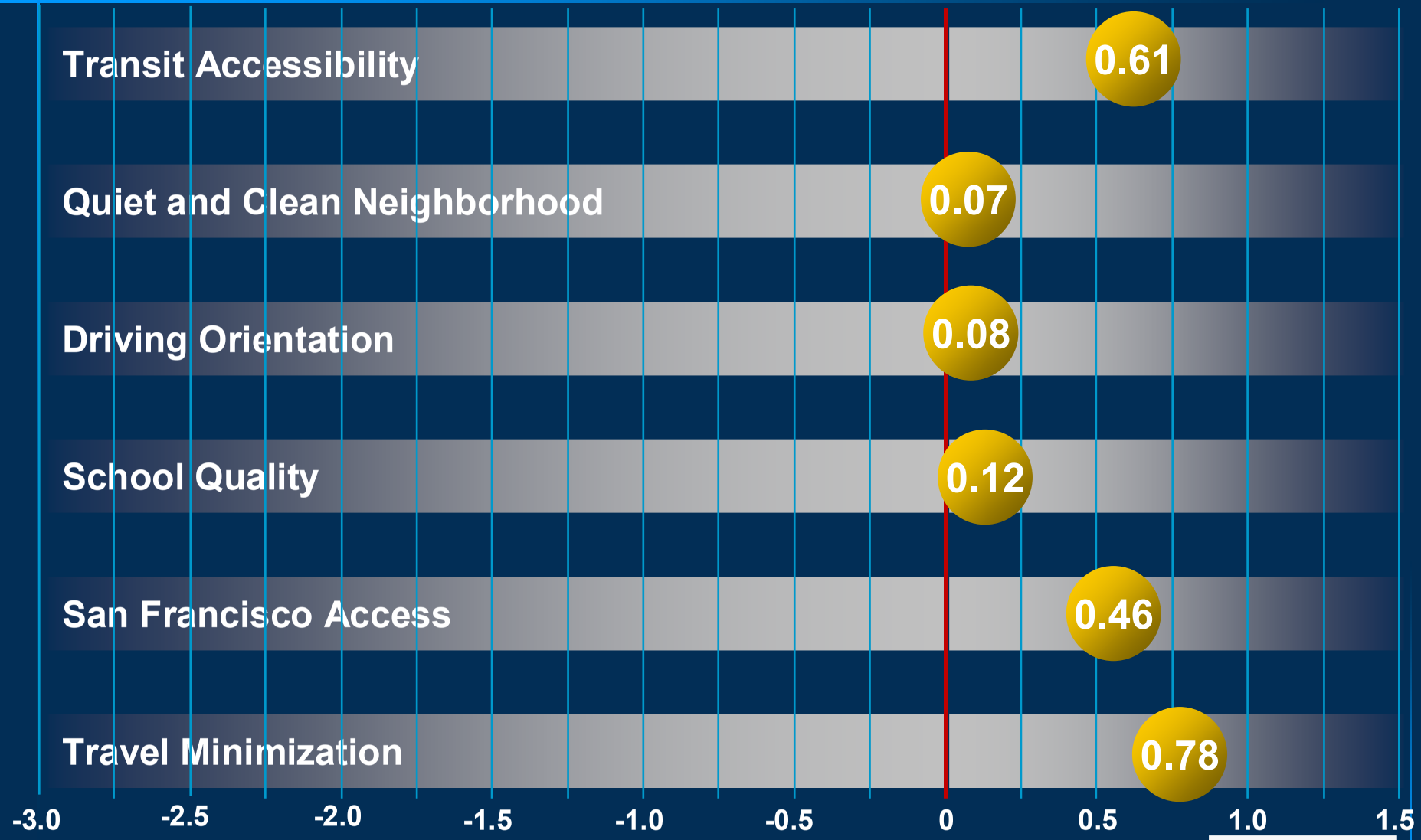
Market Segment 1
Transit Preferring



CAMBRIDGE SYSTEMATICS

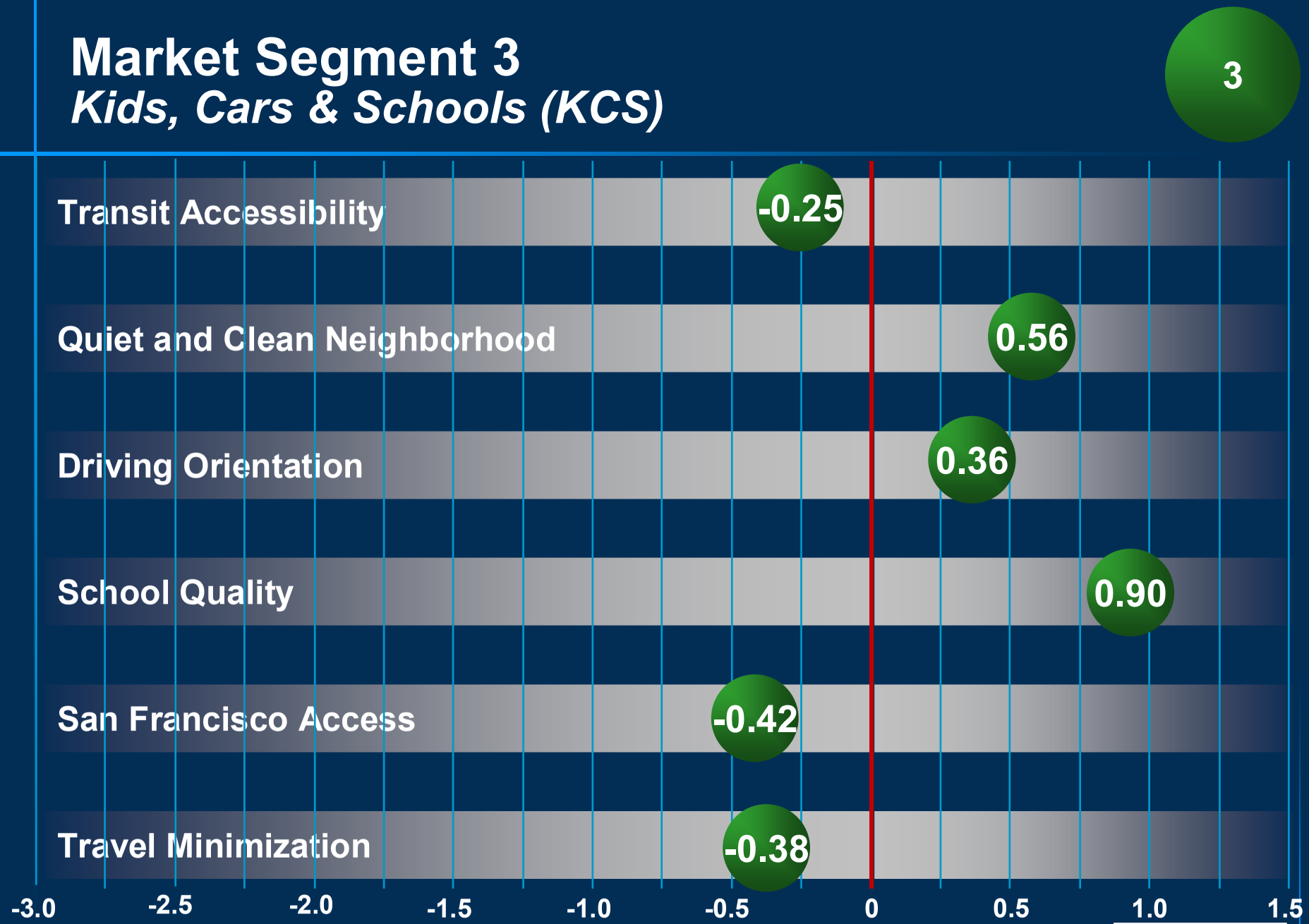
Market Segment 2
Young Brainiacs

2



CAMBRIDGE SYSTEMATICS

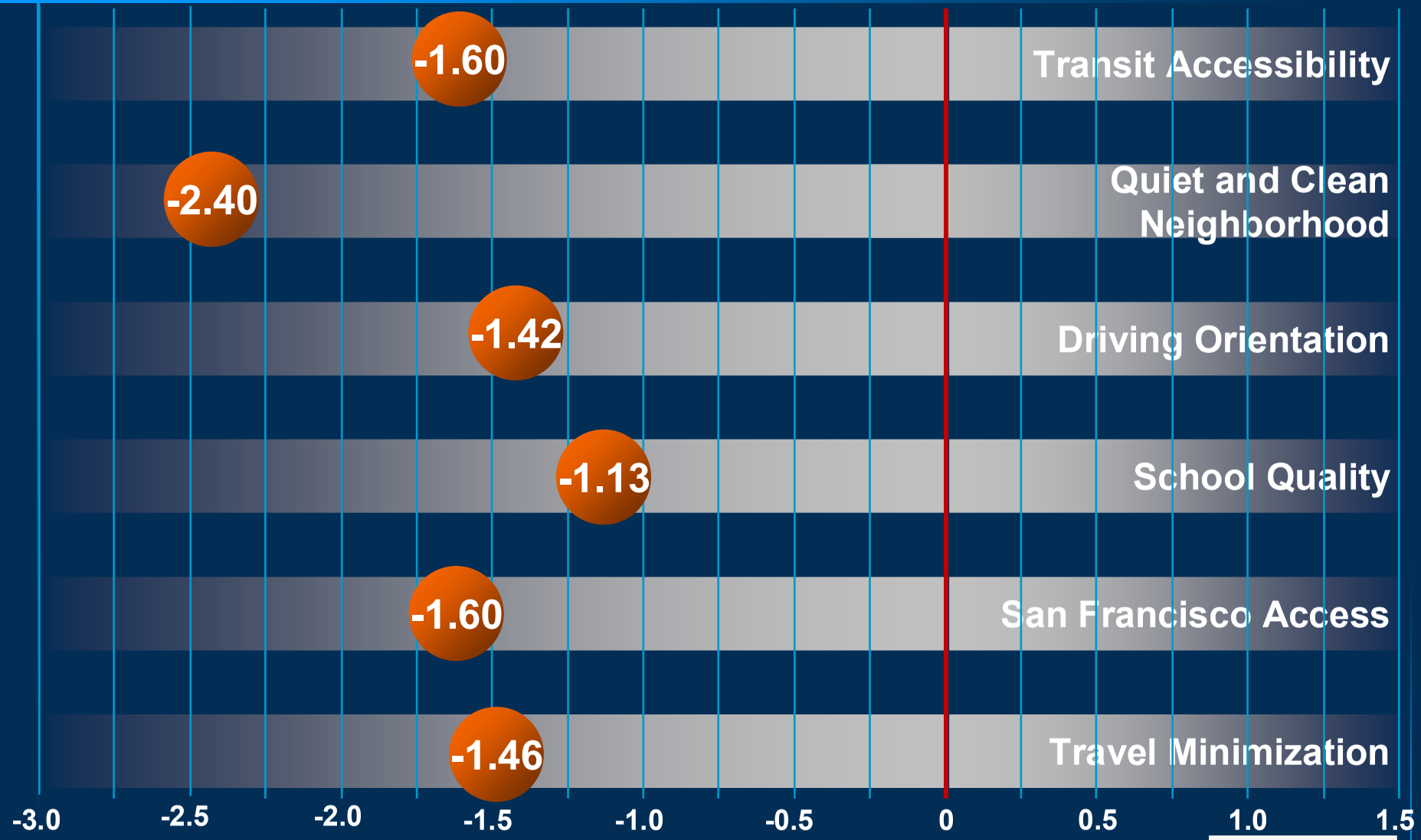
Market Segment 3
Kids, Cars & Schools (KCS)



CAMBRIDGE SYSTEMATICS

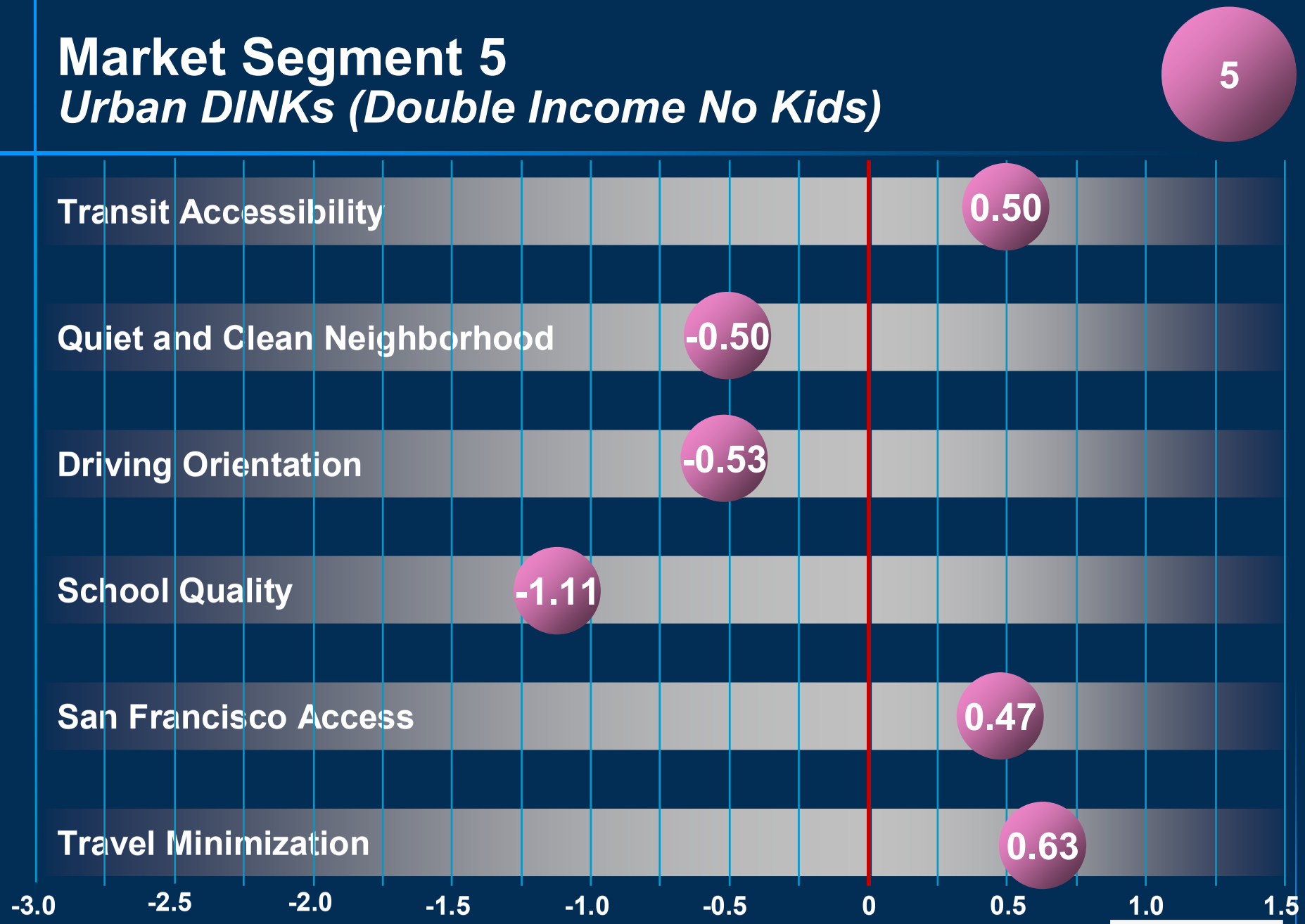
Market Segment 4
Price Conscious Auto Oriented

4



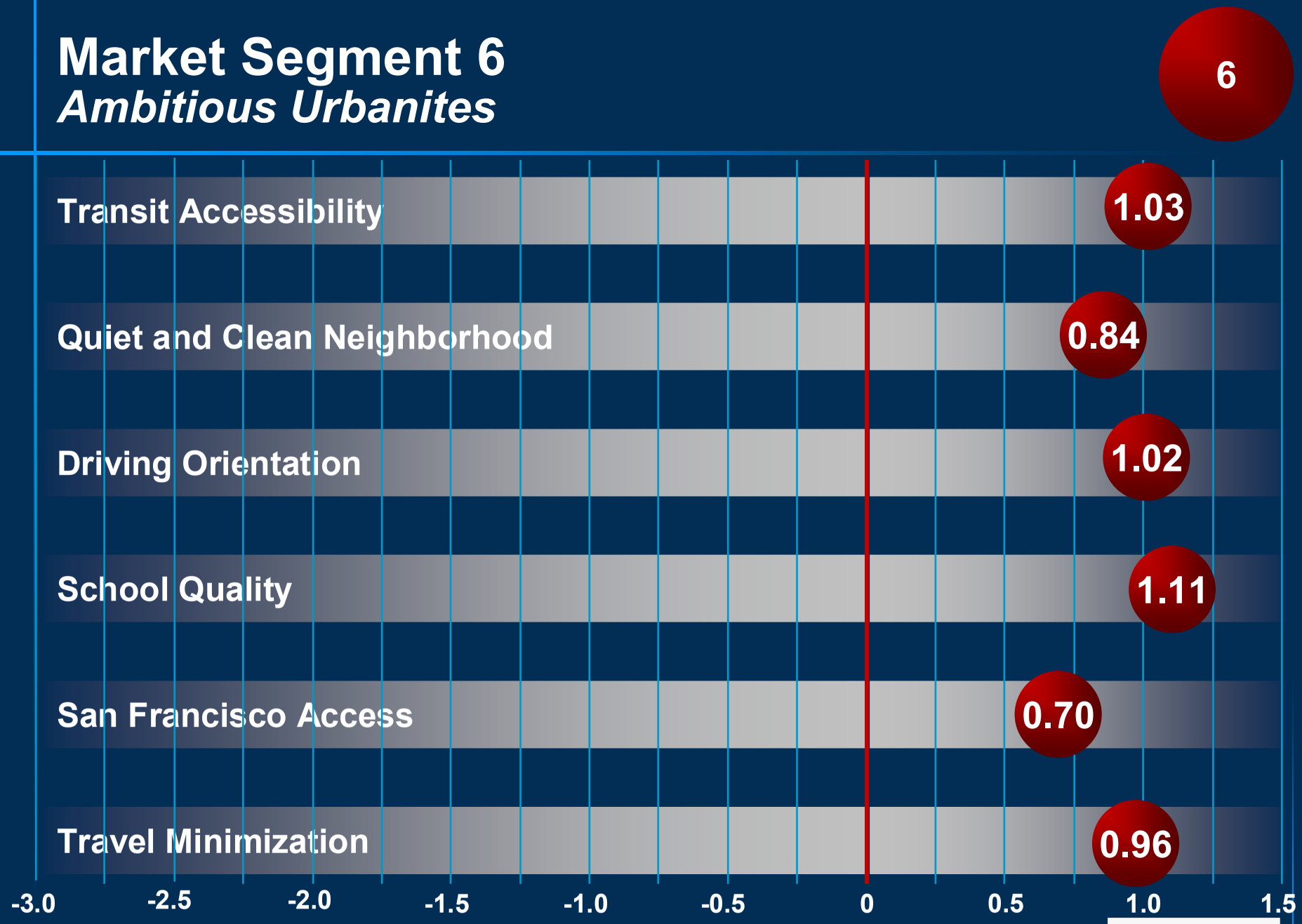
CAMBRIDGE SYSTEMATICS

Market Segment 5
Urban DINKs (Double Income No Kids)



CAMBRIDGE SYSTEMATICS

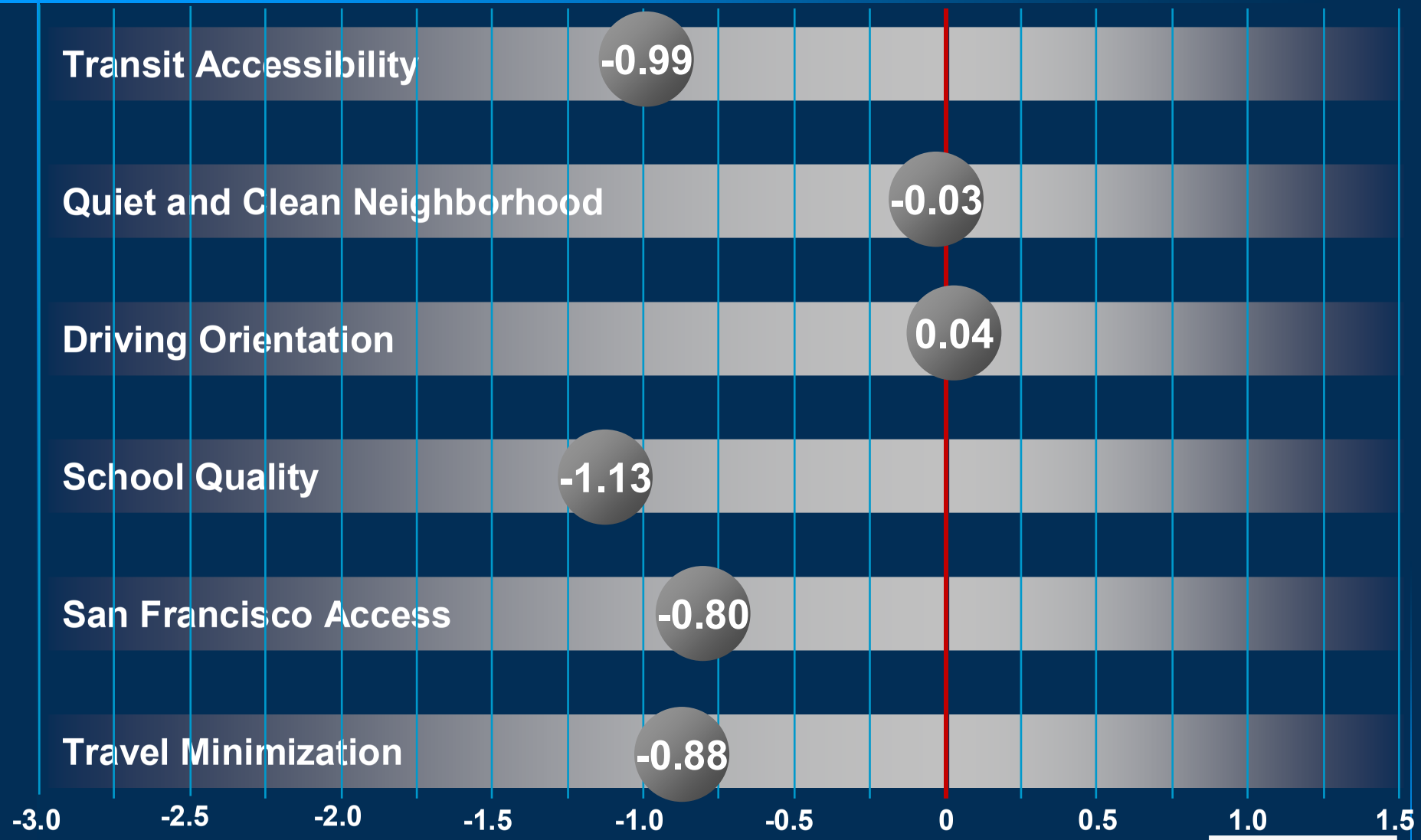
Market Segment 6
Ambitious Urbanites



CAMBRIDGE SYSTEMATICS

Market Segment 7
Mellow Couples

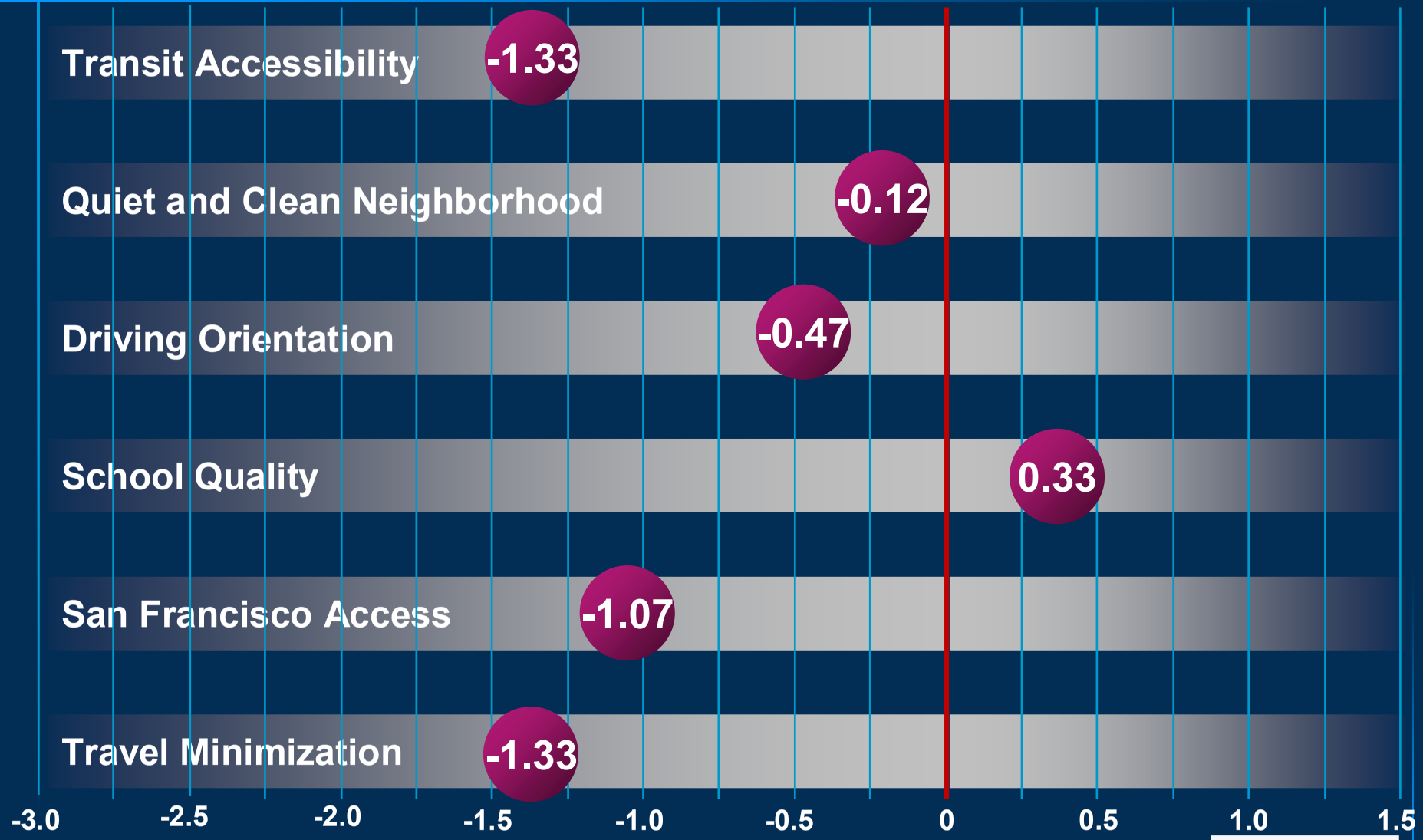
7



CAMBRIDGE SYSTEMATICS

Market Segment 8
High Income Suburbanites

8



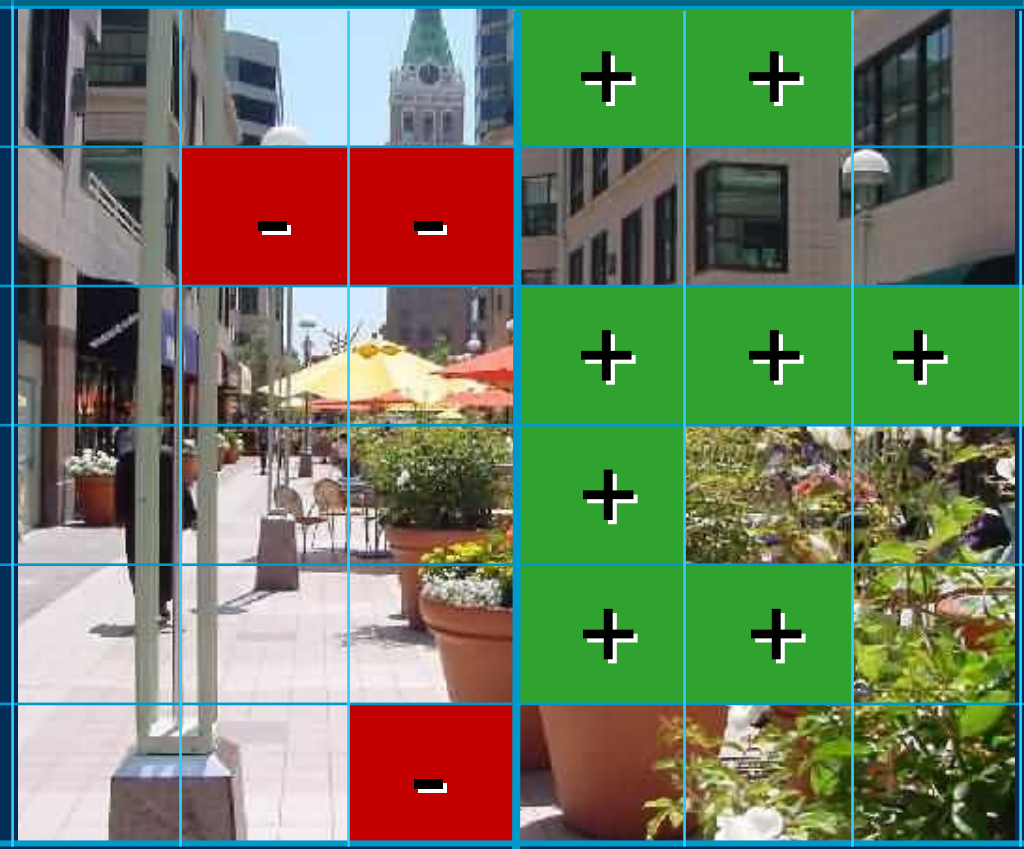
CAMBRIDGE SYSTEMATICS

Using Results to Make TODs Attractive

- Step 1 – Evaluate TOD characteristics
  - Transit, auto, density, land use mix, crime levels, school quality
- Step 2 – Identify market segments to attract
  - Compare characteristics with interests of each market segment
- Step 3 – Apply strategies to attract target market segments
  - Design and implement specific strategies

Step 1: Evaluate your TOD
Example Score Card

Selection Criteria	City Center / Urban Neighborhood
Transit Accessibility	+ +
Driving Orientation	- -
Travel Minimization / Mixed Land Use	+ + +
School Quality	+
Neighborhood Quiet and Clean	+ +
San Francisco Access	-



-3 -2 -1 0 1 2 3

Step 2 – Identify Segments to Attract
Importance of Conditions for Key Market Segments

Condition	Relative Importance Placed on Condition				
	Transit Preferring	*Urban DINKs*	*Young Brainiacs*	*Ambitious Urbanites*	*Mellow Couples*
Transit accessibility	High	High	High	High	Low
Travel min/mixed land uses	High	High	High	High	Low
San Francisco Access	Medium	High	High	Medium	Low
School Quality	Medium	Low	Medium	High	Low
Neighborhood quiet & clean	Low	Low	Medium	High	Medium
Driving orientation	Low	Low	Medium	High	Medium
Affordability	High	Medium	Medium	Medium	Low

Step 3 – Apply Strategies to Attract Segments
Sets of Strategies

- Safety and convenience of walking and bicycling
- Neighborhood quiet and clean
- Transit reliability, frequency, and access
- School quality and access
- Housing affordability
- Parking management

CAMBRIDGE SYSTEMATICS

Specific Strategies:
Safe, Convenient Walking & Bicycling

- Zone for mixed use and higher densities of nighttime uses
- Install pedestrian-scale lighting around the TOD
- Provide extensive, connected and well maintained pedestrian and bicycle amenities
- Avoid large underutilized parking lots
- Create narrow street widths and short blocks to improve pedestrian safety and more direct access

Specific Strategies: Neighborhood Quiet and Clean

- Quickly remove trash and graffiti
- Install and maintain extensive high quality landscaping
- Calm traffic, reduce vehicle speeds
- Monitor late night noise from parties, vehicles
- Engage community in “Quality of Neighborhood” assessments, address concerns

Specific Strategies:
Transit reliability, frequency, and access

- Locate new developments very close to high quality transit; create high quality pedestrian access to transit station/stop
- Transit reliability and access –
  Install and maintain station area improvement and rider amenities, such as quality shelters, real time information, and signal priority
  Create dedicated bus ways or network of feeder buses into hub
- Transit frequency –
  Improve commute and non-commute frequency
  Increase hours of operation
- Transit access to San Francisco –
  Extend hours for late night access to San Francisco
  Direct transit links or cross platform transfer

Specific Strategies:
School Quality and Access Strategies

- Leveraging TODs Already Located Close to Good Schools
  - Improve sidewalks and initiate "safe routes to school"
  - Focus on attracting Young Brainiacs
- For TODs not proximate to distinguished schools
  - Attracting market segments with less of a priority on schools - Transit Preferring, the Urban DINKs, Mellow Couples
  - Attract a charter or independent school
  - Improve local school

Specific Strategies: Housing Affordability

- Housing assistance programs for individual households
- Local requirements on developers for affordable housing, allow accessory units, co-housing, rental units
- Reduction of household transportation costs through reduced parking requirements and unbundling of costs
- Local requirements on developers for provision of transit passes / car share / bicycling amenities
- Expedite entitlement process to support increased construction of units and density close to transit

Specific Strategies:
Parking Management Strategies

- Ambitious Urbanites and Mellow Couples want
  - To be able to drive around easily
  - To have convenient access to freeways, readily available parking, and private garages
- Provide parking for residents who are willing to pay for it
  - Unbundle the cost of parking from living or working space
  - Provide car sharing services
  - Sell permit parking to provide preferential access to street parking for local residents

Next Steps

- Presentations to interested parties
- Finalize and distribute Briefing Book and technical reports, post on web
- Consider applicability to MTC/ ABAG supported planning processes
  - Station Area Planning
  - FOCUS/PDA outreach
  - TOD TAP
  - TLC Design Guidelines