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COMMISSION

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## *Memorandum*

TO: Planning Committee

DATE: Oct. 1, 2009

FR: Deputy Executive Director, Policy

RE: The Choice to Reside in a Transit Oriented Development: Study Completion

### **Background**

Attracting more residents to TODs, key to the region's goals for reducing vehicle miles of travel and greenhouse gas emissions, requires the efforts of both private developers to construct TODs and public agencies to shape the characteristics of the neighborhoods. This study, funded by Caltrans, uses market research methods to help public agencies understand the public policies that can make TOD neighborhoods most attractive to potential residents. The effort included focus groups, surveys of over 900 households in the Bay Area who have recently moved or plan to move soon, input by a Technical Advisory Committee (TAC), and policy review by local practitioners. Details of the methodology were presented to the Planning Committee previously; this memo focuses on the results and implications.

### **Survey Results**

Based on statistical analysis of responses to 35 attitudinal questions about choosing a home, we defined six key interests regarding desirable neighborhood and travel characteristics:

- Travel minimization: Near quick and reliable transit, easy walk and bike access to errands
- Neighborhood amenities: quiet streets, clean neighborhood that feels safe walking at night.
- Transit accessibility: the importance of proximity to high quality transit
- Driving orientation: having a garage, on-street parking, easy access to a freeway
- School quality: good school district, being able to safely walk to schools
- San Francisco access: Living within an easy transit ride to downtown San Francisco

We defined eight distinct market segments based on attitudes as summarized below:

- ***Transit Preferring*** – very strong interest in access to quality transit and minimizing travel, very little interest in quiet neighborhoods or driving, half have no vehicle in household
- ***Young Brainiacs*** - strong interest in quality transit, minimizing travel, and access to San Francisco, some interest in schools and quietness; well educated, low auto ownership
- ***Kids, Cars and Schools*** – very strong interest in good schools and quiet neighborhood, interest in driving, some interest in walking and biking
- ***Price Conscious Auto Oriented*** – low overall interest in survey factors, most interest in driving, sensitive to costs
- ***Urban DINKS*** (Double Income No Kids) - strong interest in quality transit, minimizing travel, and access to San Francisco; low interest in schools, quietness or driving

- ***Ambitious Urbanites*** - high overall interest in all survey factors, most interest in school quality following closely by proximity to transit, travel minimization and driving
- ***Mellow Couples*** - low overall interest in survey factors, most interest in driving, quiet neighborhood and walking to errands
- ***High Income Suburbanites*** – strong interest in schools, very low interest in transit or minimizing travel; predominately families with children, high auto ownership

Each group has a unique mix of desires for neighborhood types and amenities, providing information for how to attract them to TOD neighborhoods, which we classified as follows:

- **Easiest to Attract:** Three segments, representing 38% of the market, are the most easily attracted to TODs based on strong interest in transit and low interest in driving: Transit Preferring, Urban DINKs and Young Brainiacs are good target segments for most TODs.
- **Possible to Attract:** Two segments, representing 29% of the market, are somewhat amenable to attract, having some interests that match TOD characteristics and others that do not. The Ambitious Urbanites have interest in transit, but also value driving; the Mellow Couples are interested in walking and bicycling for errands, but less interested in transit.
- **Hardest to Attract:** Three segments, representing 33% of the market, are the hardest to attract because of attitudes such as a low desire to use transit and a strong interest in driving, Kids, Cars, and Schools, Auto-Oriented, Price Conscious, and the High-Income Suburbanites.

### **Policy Implications**

Overall we found very broad and strong interest in living in neighborhoods that are perceived as safe and convenient to walk and bike to do errands. This speaks to the importance of prioritizing the safety and comfort of walking and increasing the number of walkable destinations to make TOD neighborhoods an attractive option for more people.

We are developing a Briefing Book/Toolbox to assist public agencies in attracting residents to TOD neighborhoods, including examples of neighborhoods that have both positive qualities and challenges, and policy suggestions to improve the attractiveness for key market segments. The full set of technical papers will be available online and on a CD with the Briefing Book/Toolbox.

### **Next Steps**

Upon completion of the Briefing Book/Toolbox, MTC staff intends to:

- Present this information to interested parties. Presentations are currently scheduled for the MTC Advisory Council, the Minority Citizens Advisory Committee and the National Rail~Volution Conference
- Distribute the Briefing Book/Toolbox to interested local city planning and public works departments and other agency staff, advocacy groups and individuals
- Make the Briefing Book/Toolbox and technical papers available on MTC's website
- Reference the work in related regional efforts as appropriate, such as the Station Area Planning, FOCUS/Priority Development Areas outreach, TOD Technical Assistance Program, and Transportation for Livable Communities Design Guidelines

I look forward to your comments and suggestions.

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Ann Flemer