



METROPOLITAN
TRANSPORTATION
COMMISSION

Agenda Item 10

Joseph P. Bort MetroCenter
101 Eighth Street
Oakland, CA 94607-4700
TEL 510.817.5700
TDD/TTY 510.817.5769
FAX 510.817.5848
E-MAIL info@mtc.ca.gov
WEB www.mtc.ca.gov

Memorandum

TO: Elderly and Disabled Advisory Committee

DATE: Nov. 25, 2009

FR: Valerie Knepper, MTC

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

Background

Attracting more residents to transit-oriented developments (TODs), key to the region's goals for reducing vehicle miles of travel and greenhouse gas emissions, requires the efforts of developers to construct TODs and of public agencies to shape the neighborhood characteristics. This study, funded by Caltrans, uses market research methods to help public agencies understand the policies that can make TOD neighborhoods more 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. This memo focuses on the results and implications (details of the methodology are available separately).

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, and 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 percent 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 percent 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 percent 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; Price Conscious, Auto-Oriented; 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 (MTC Planning Committee, Advisory Committees, 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; and
- 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.

Staff will present this information at your December 3 EDAC meeting in order to obtain your comments.

Understanding the Choice to Reside in a Transit-Oriented Development

presented to
Elderly and Disabled Advisory Committee

December 3, 2009



presented by
Valerie Knepper, MTC

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

Understanding the Market for TOD

Demand Should Drive Supply



2

CAMBRIDGE

Survey results: Six Key Attitudes Shape Neighborhood Choice

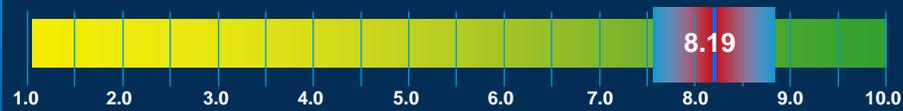
- Travel minimization / mixed land use
- Quiet and clean neighborhood
- Transit accessibility
- Driving orientation
- School quality
- San Francisco access

3

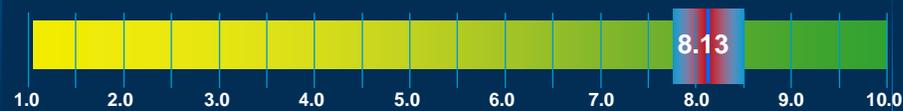
CAMBRIDGE

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

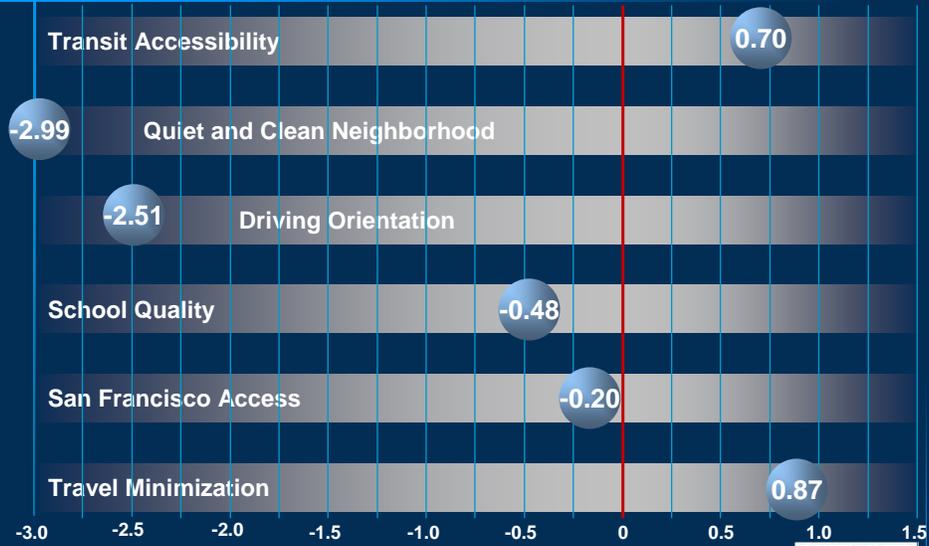


4

CAMBRIDGE

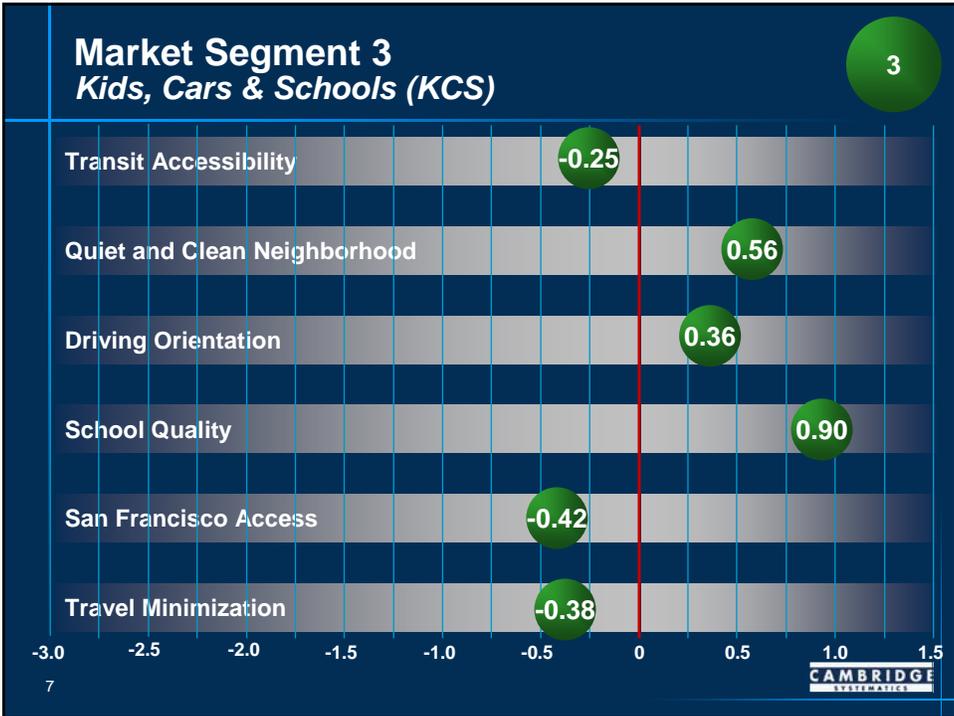
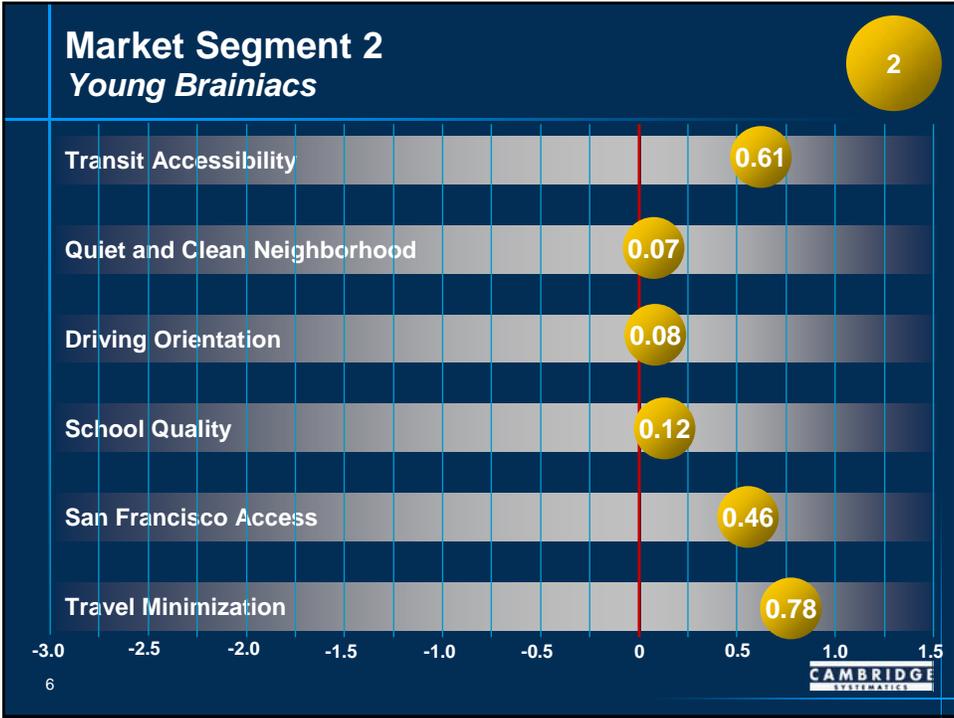
Market Segment 1 Transit Preferring

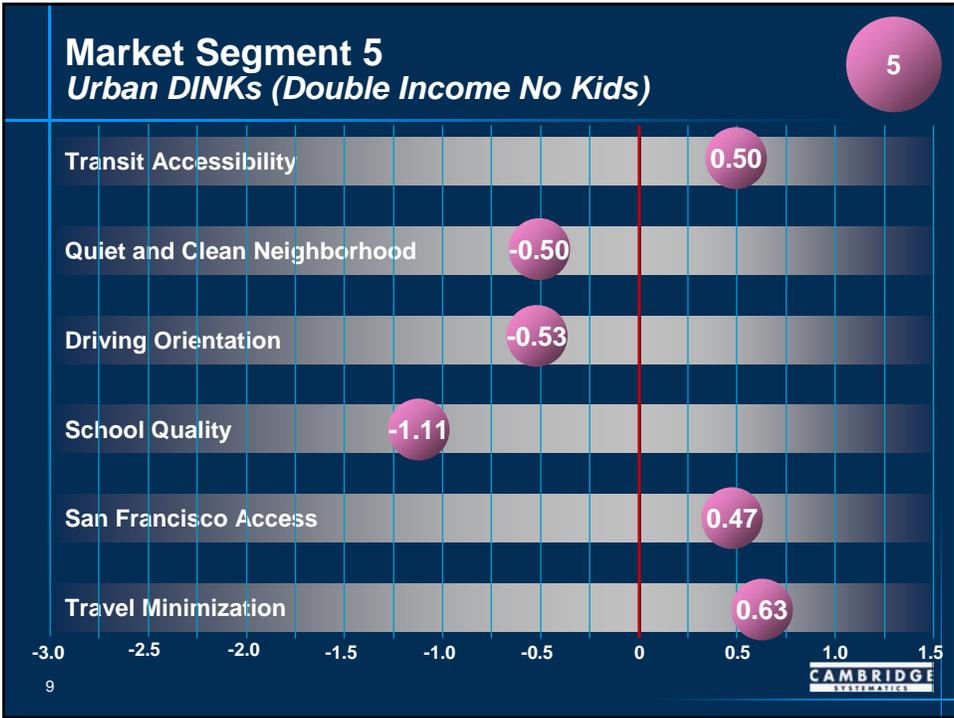
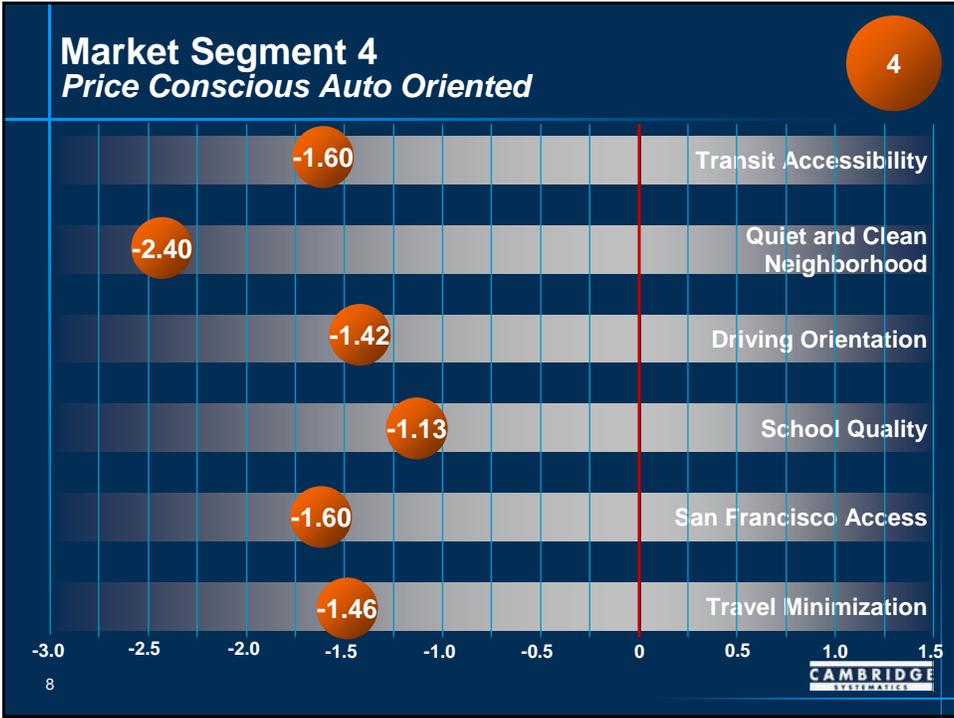
1

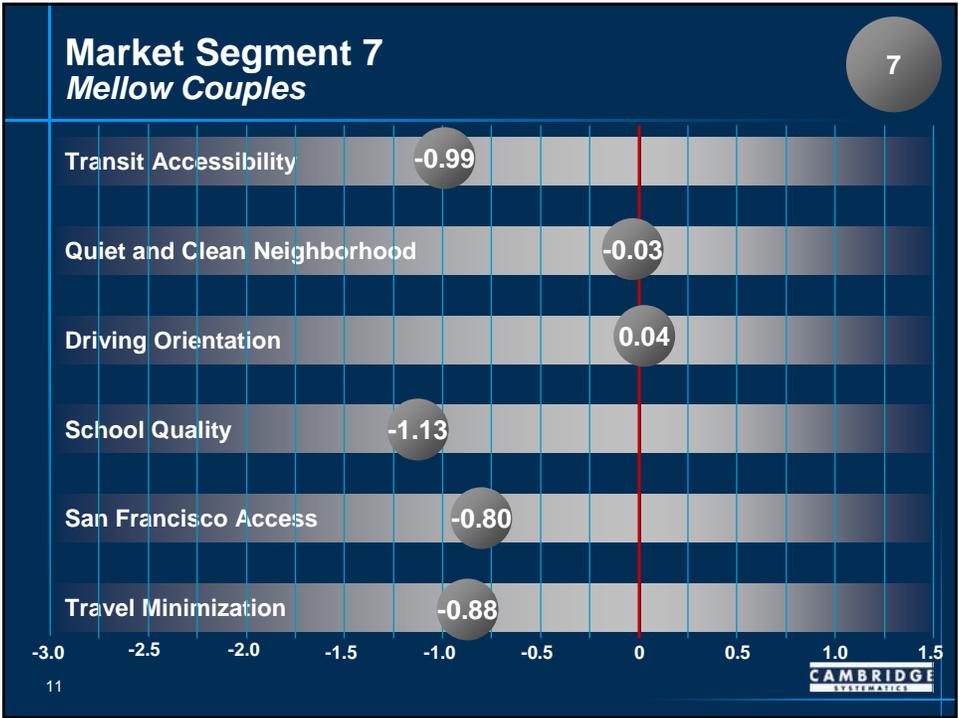
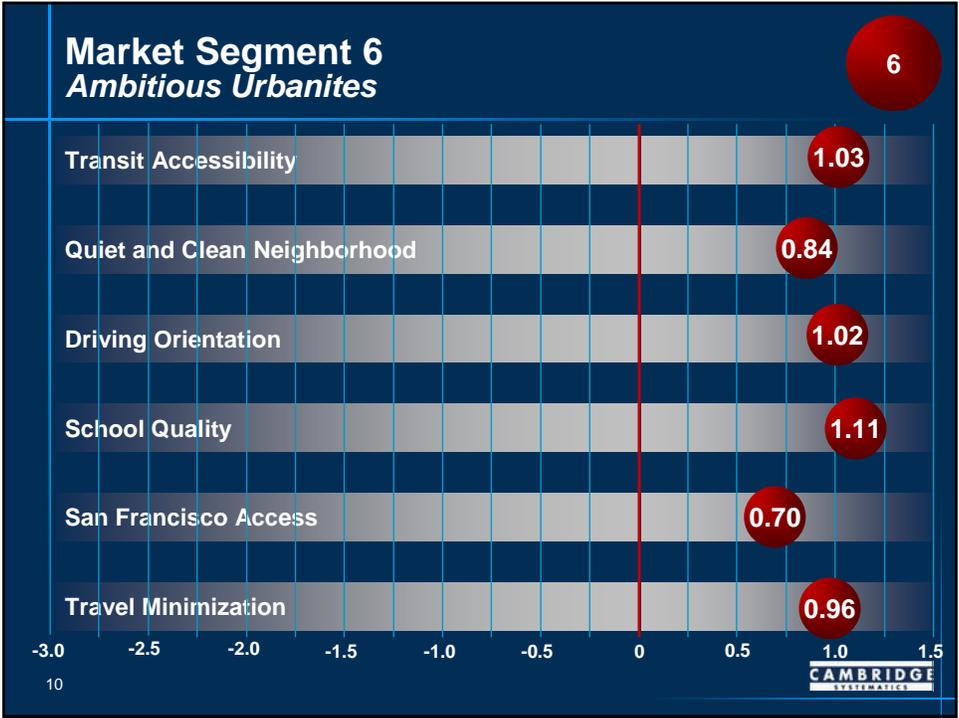


5

CAMBRIDGE

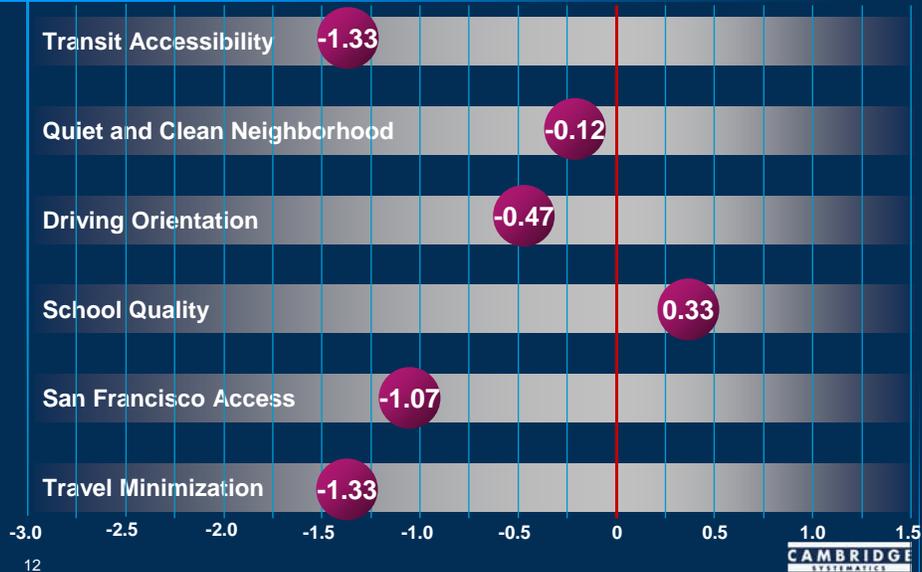






Market Segment 8 *High Income Suburbanites*

8



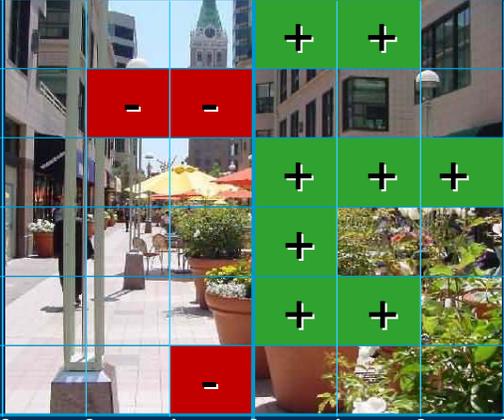
Using Results to Make TODs Attractive

- 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

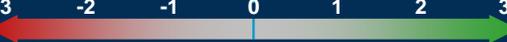
13

CAMBRIDGE

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



14

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

15

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**

16

CAMBRIDGE
PLANNING

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**

17

CAMBRIDGE
PLANNING

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

18

CAMBRIDGE
PLANNING

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

19

CAMBRIDGE
PLANNING

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

20

CAMBRIDGE
PLANNING

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**

21

CAMBRIDGE
PLANNING

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

22

CAMBRIDGE
PLANNING

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

23

CAMBRIDGE
PLANNING