

Capital Metro

Strategic Planning & Operational Analysis

Integrating Market Research

Taking a Market-based Approach to Compete With the Car

- Capital Metro is taking an innovative, private-sector market research approach
 - Identify and target specific market segments
 - Understand what will it take to for people in those segments to choose public transit instead of the automobile
- Surveying Central Texans to more fully understand their daily travel-related attitudes, preferences, and choices
 - Seek to understand the critical attitudes and tradeoffs of all potential travelers
 - Describe the transit competitiveness of every neighborhood in Capital Metro's service area

Market-Based Planning Process From Private Sector to Public Sector

Private Sector



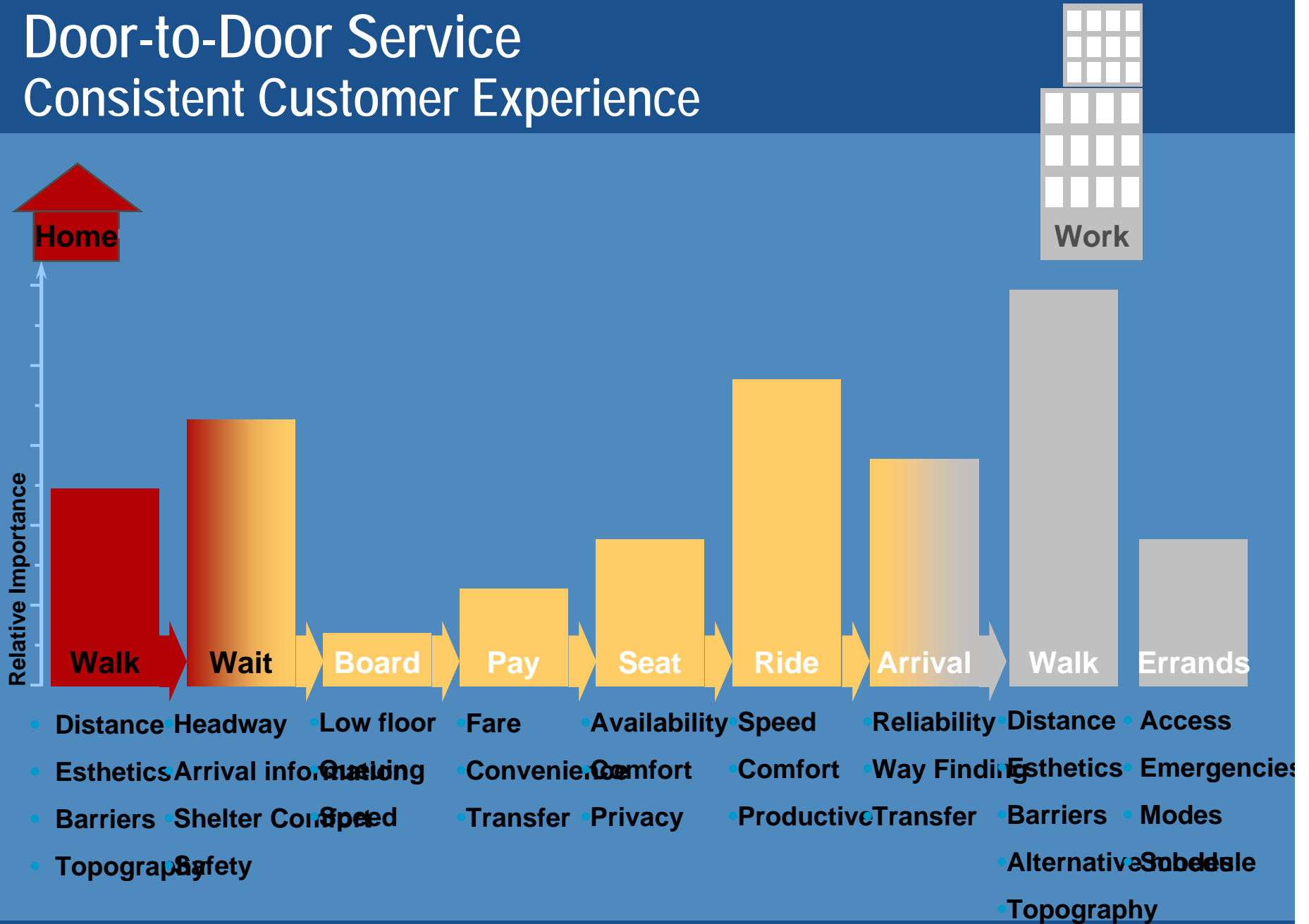
Mobility Services



Key Questions

- The Capital Metro project will query households about their attitudes and sensitivities toward their local travel experiences.
- Sample questions include:
 - How much do people value their privacy when they travel?
 - How important is it to feel safe?
 - Is reliable door-to-door travel time important?
 - What about the impact on our environment?

Door-to-Door Service Consistent Customer Experience



Strategic Roadmap From Market Research to Service Planning

Understand Customers

Market Segmentation
Mode Choice Analysis

Service
Planning Tool
(SPT)

Competitive Positioning

Existing Assets
Local government
cooperation
Financial
resources

Service Planning

Product
development
Local government
negotiations

Branding & Marketing

Agency reforms
Incentives
Outreach

Understand Markets

Origin – Destination Volumes
Other Travel Market Conditions

Transit
Competitiveness
Factor
(TCF)

Understanding Traveler Attitudes Attitude-Based Market Research Survey

Recruit Survey

~1,800 Recruits

Choice Experiments

1,000 Completes

Attitudinal and Demographic Survey

1,000 Completes

Determine Traveler Attitudes

Need for Flexibility and Speed



Personal Travel Experience



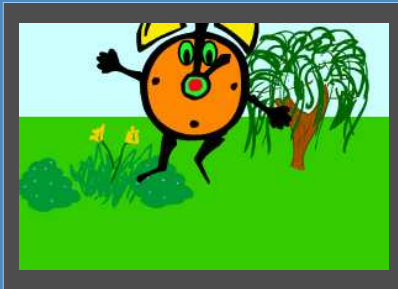
Personal Safety



Concern for the Natural Environment



Value of Time & Productivity



Transportation Costs



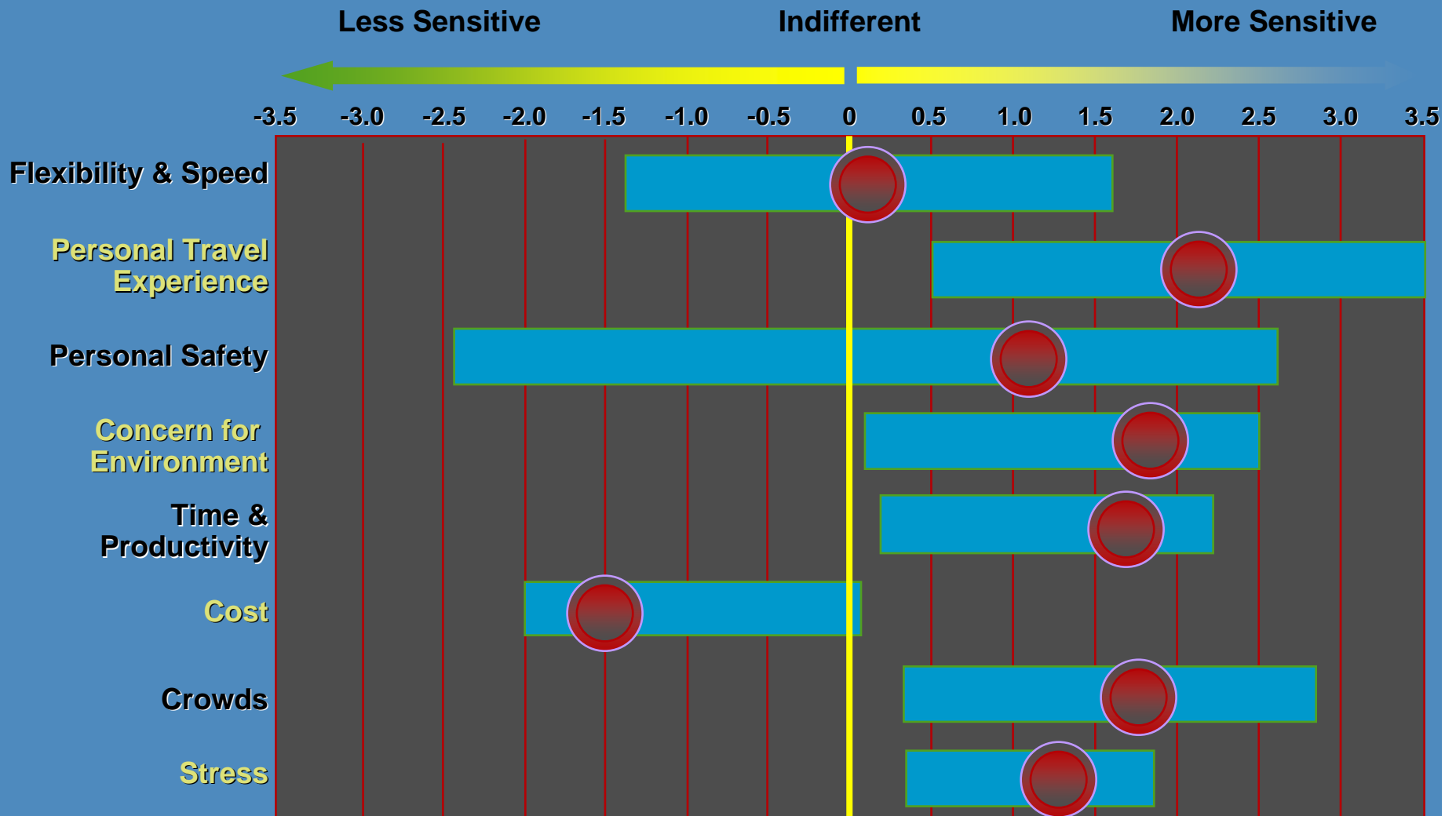
Crowds



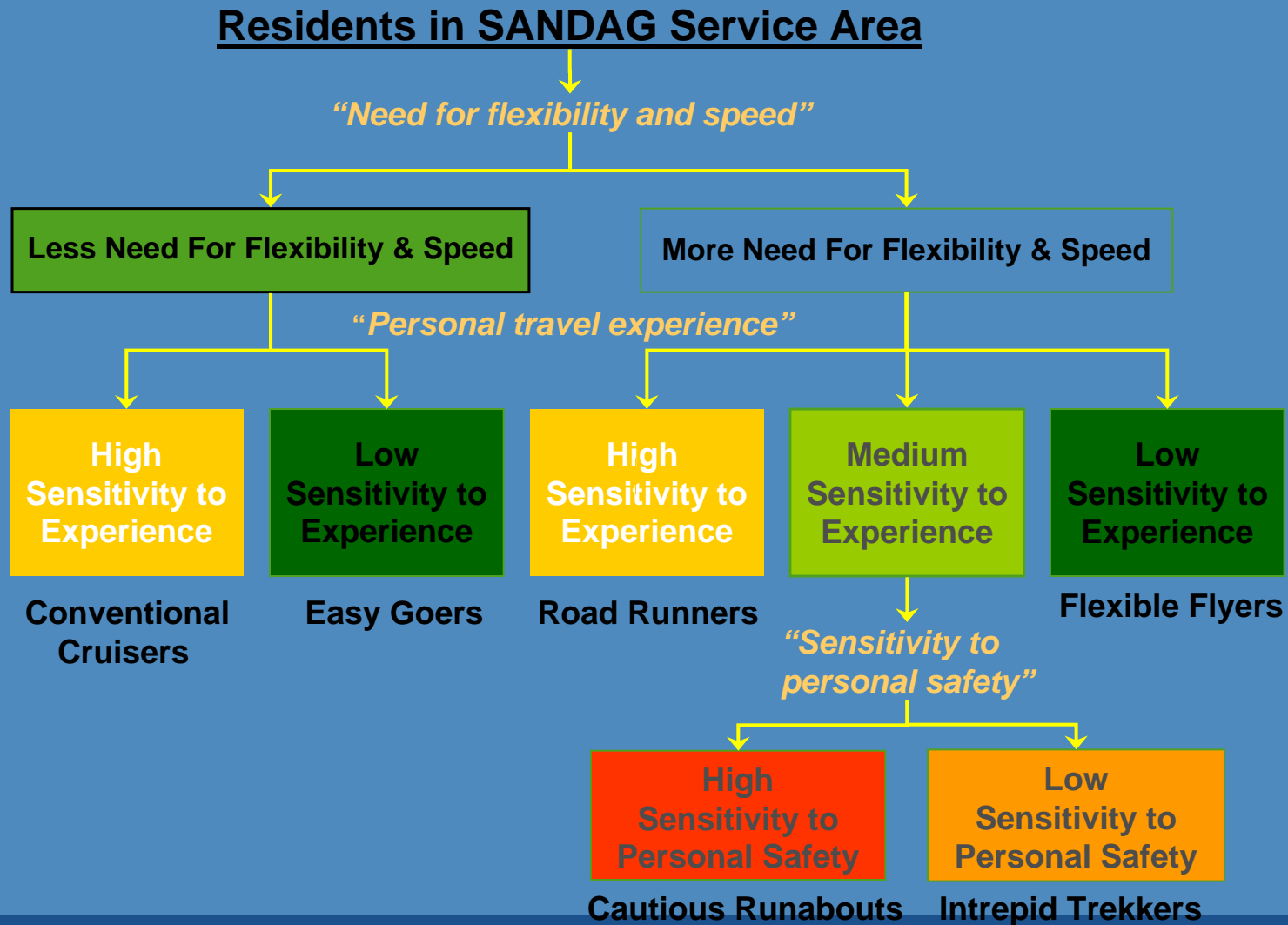
Stress



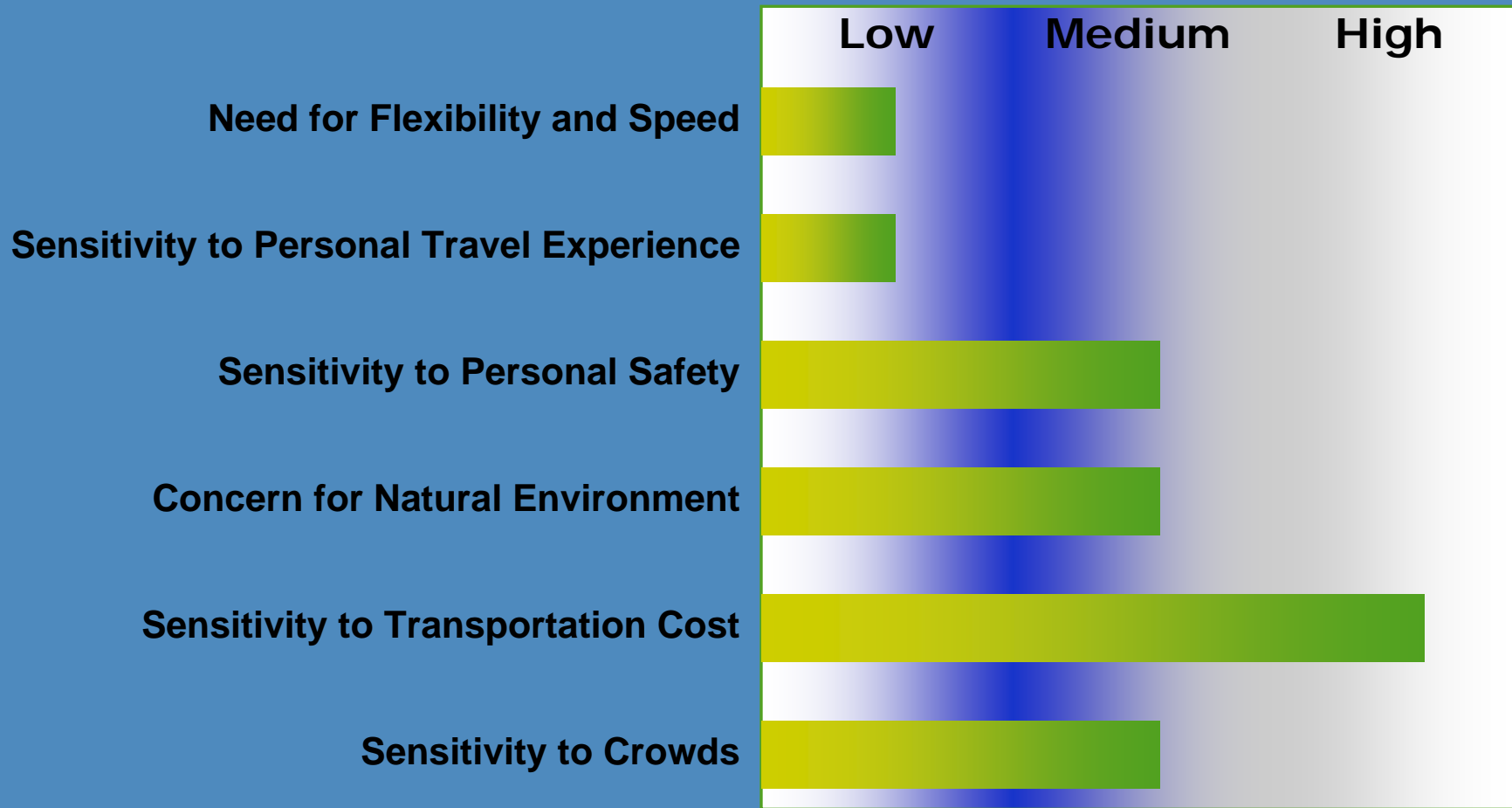
Universal Design Service Attributes Important for Entire Service Population



Structure of Market Segments San Diego Region



Easy-Goers Care About...



Quantifying Tradeoffs

How Much Do Flexible Flyers Value Different Options?

Save 5 minute walking access time



Save 5 minute parking search time



Guaranteed seat



No transfer



Save 5 minute driving access



Shuttle



Reduce cost by 50 cents



Save 5 minute in-vehicle travel time



Having real time arrival information



Improve peak headway by 5 min



Improve off-peak headway by 5 min



Strategic Roadmap

Understanding Markets

Understand Customers

Market Segmentation

Mode Choice Analysis

Service
Planning Tool
(SPT)

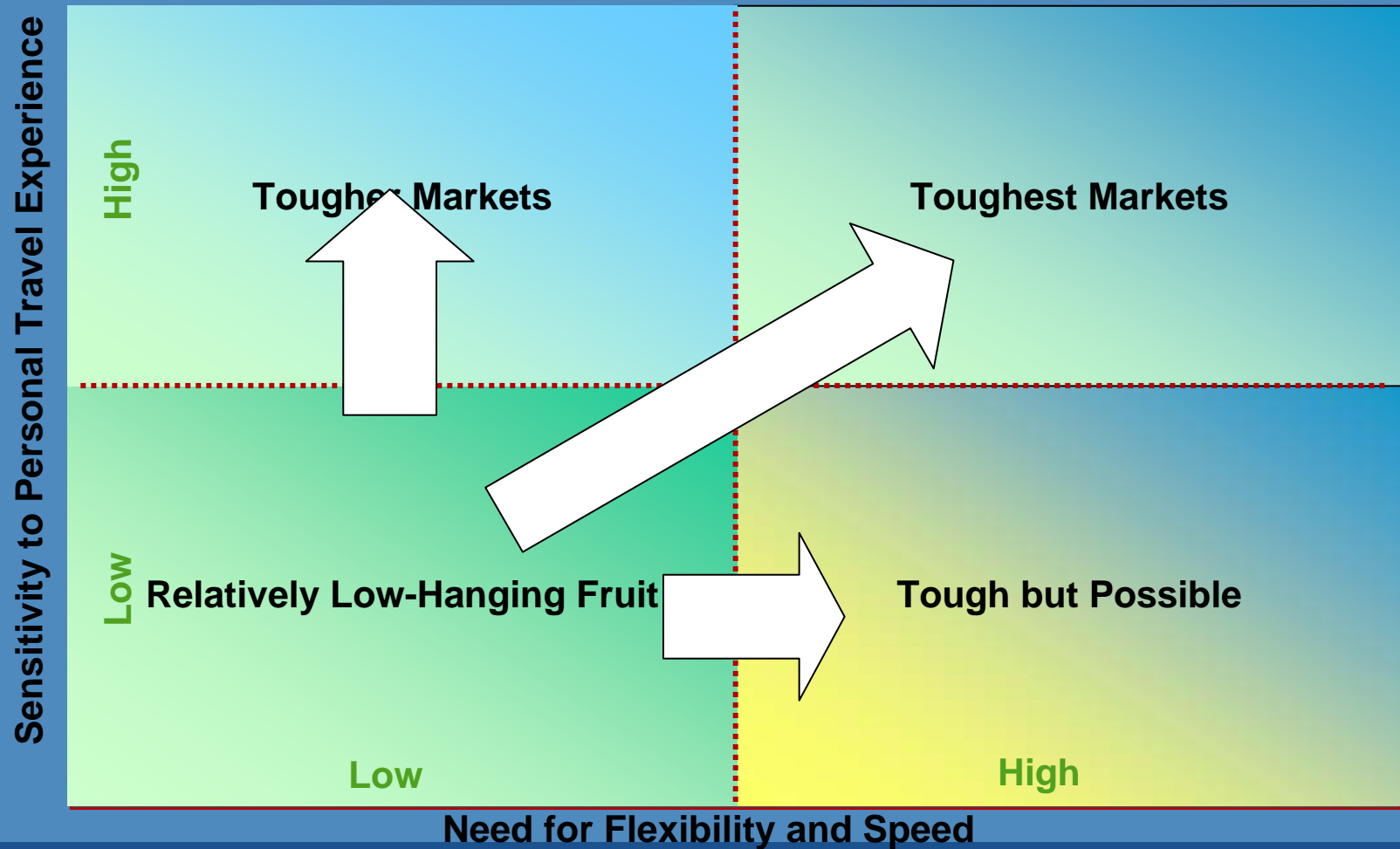
Competitive Positioning

Existing Assets

Local government
cooperation

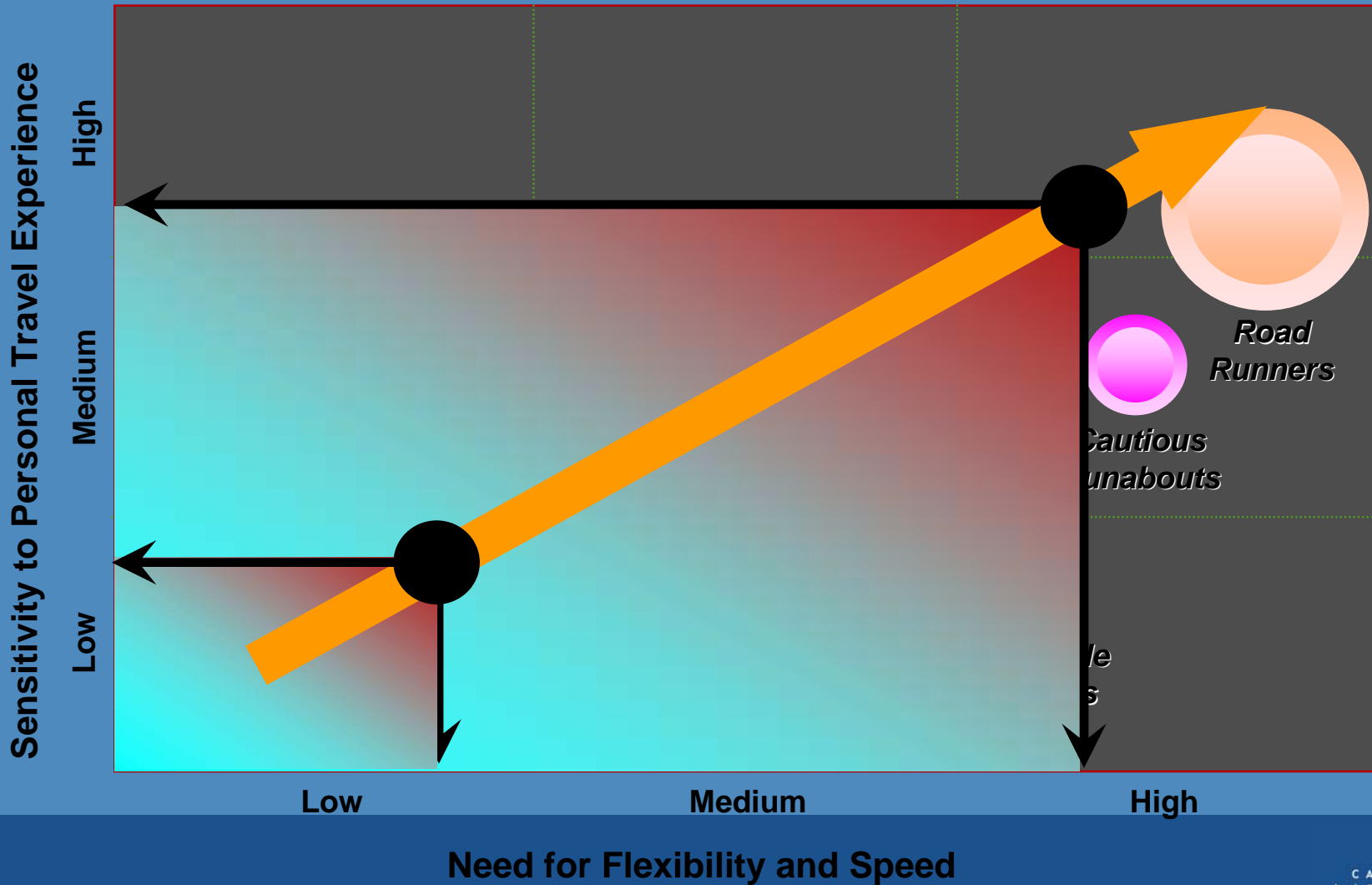
Financial
resources

Market Segmentation Competitive Positioning

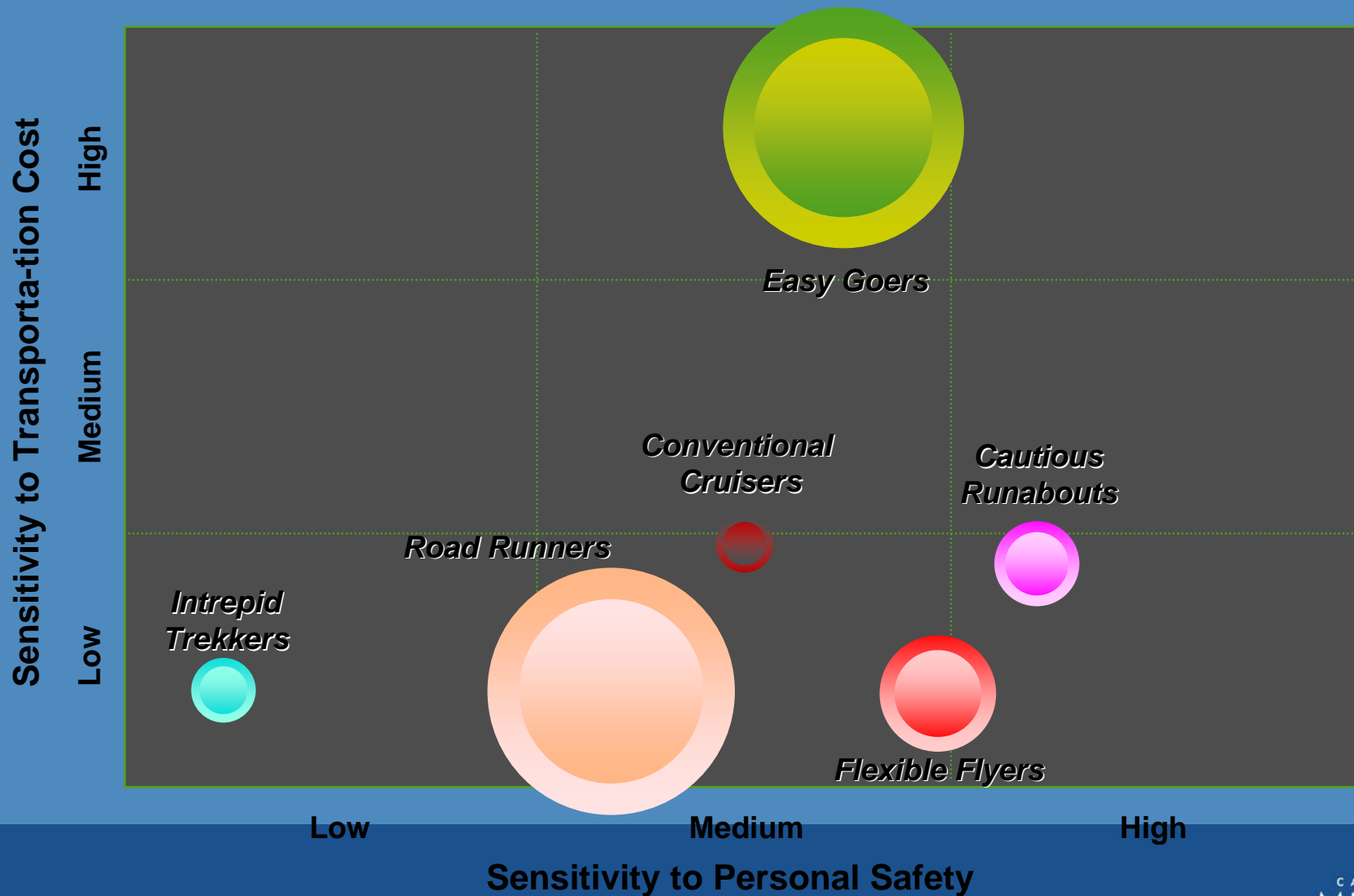


Example Competitive Positioning

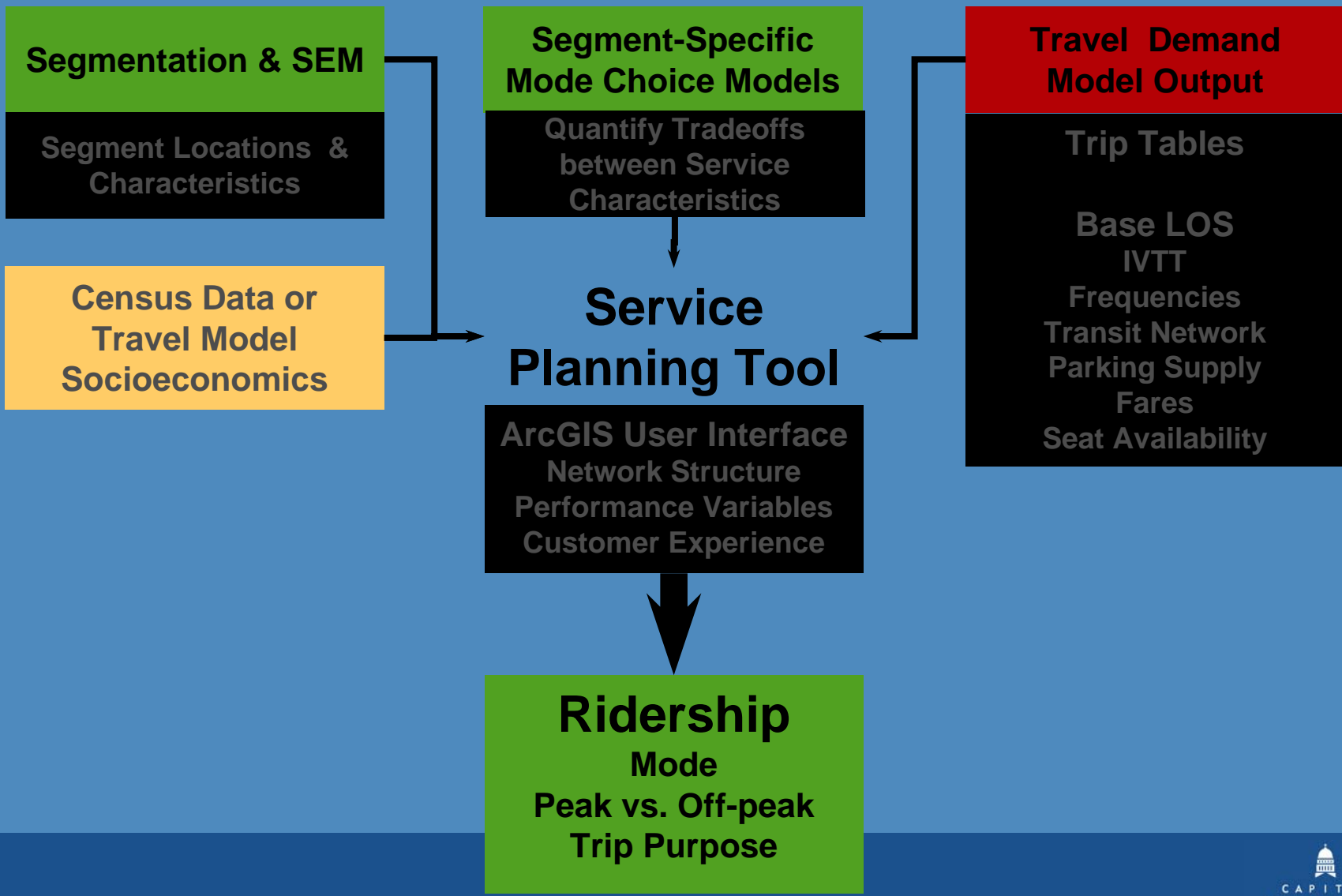
Personal Travel Experience v. Flexibility & Speed



Example Competitive Positioning Cost v. Personal Safety



Service Planning Tool



finalTOOL_withreport_0408_from0326 - ArcMap - ArcView

File Edit View Insert Selection Tools Window Help

LOS INPUT WINDOW

Please define LOS changes for HBW Trips

| | | | BUS | RAIL | AUTO |
|--|---|------------------------------------|-----|------|------|
| IVTT | <input checked="" type="radio"/> minute | <input type="radio"/> % | -5 | -10 | 0 |
| Travel Cost | <input checked="" type="radio"/> dollar | <input type="radio"/> % | 0.5 | 0 | 0 |
| Drive Access | <input type="radio"/> minute | <input checked="" type="radio"/> % | 0 | 0 | 0 |
| Walk Access/Egress | <input checked="" type="radio"/> minute | <input type="radio"/> % | 0 | 0 | 0 |
| Peak Frequency (Sevice runs every X minutes) | <input checked="" type="radio"/> minute | <input type="radio"/> % | 0 | 0 | 0 |
| Offpeak Frequency (Sevice runs every X minutes) | <input checked="" type="radio"/> minute | <input type="radio"/> % | 0 | 0 | 0 |
| Number of Transfers | <input checked="" type="radio"/> number | <input type="radio"/> % | 1 | 0 | 0 |
| Parking Search Time at Destinations (in Minutes) | <input checked="" type="radio"/> minute | <input type="radio"/> % | 0 | 0 | 0 |
| Seat Availability (0/1) | | | 0 | 0 | 0 |
| Shuttle bus for local transit service (0/1) | | | 1 | 0 | 0 |
| Real time information (0/1) | | | 0 | 0 | 0 |

Previous **Next** Cancel

Layers

- D:\PROJECTS\SAMT
 - stnlinks_noxpq
 - stnlinks
 - smstreets_utm
 - taz_marketarea
 - <all other va
 - MARKET_AR
 - Burlingame/H
 - Daly City / C
 - Foster City
 - Half Moon Be
 - Menlo P/E.Pa
 - Pacifica
 - Red Wood Ci
 - S. San Franci
 - SF Airport
 - San Bruno / t
 - San Carlos/B
 - San Mateo
 - Woodside/Pc
 - TAZs
 - JUNKMODE
 - JUNK1
- D:\PROJECTS\SAMT
 - CALTRAIN

Display Source

Drawing

Arial 10 B I U

323.40 2570.42 Miles

What's Next?

- Capital Metro understands that it must provide transit service from the “right” origin to the “right” destination that appeals to a specific customer. Designing such perfect-fit transit service is a challenge that Capital Metro is eager and ready to take on.
- **Timeline**
 - Fall/Winter 2007 – survey of 1,000 service area residents/complementary onboard surveys
 - Winter, 2007/2008 – market segmentation, choice modeling and competitive analyses developed
 - Spring/Summer 2008 – branding and marketing strategies will be developed
 - Summer/Fall 2008 – Capital Metro to share study results and its plans for service optimization. Implement outreach and community involvement efforts.

Questions?

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