

# *Memo*

Date: August 13, 2010

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From: Bob Prowda  
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Subject: Results from Market Segmentation Survey, Focus on Transit/Transportation Development

The Market Segmentation Survey provided information in three areas, ridership development, longer-term transportation development and community understanding of NCTPA. This memo presents the key findings for long-term transit and transportation development.

The Market Segmentation survey interviewed adults (18 years of age or older) in Napa County who had not used public transit service in the County in the past year. All of the information reported in this memo is from non-riders. A total of 501 interviews were completed with people sampled randomly using random-digit-dialing methodology. There were no unusual events that would influence the results one way or another.

## **Key Findings**

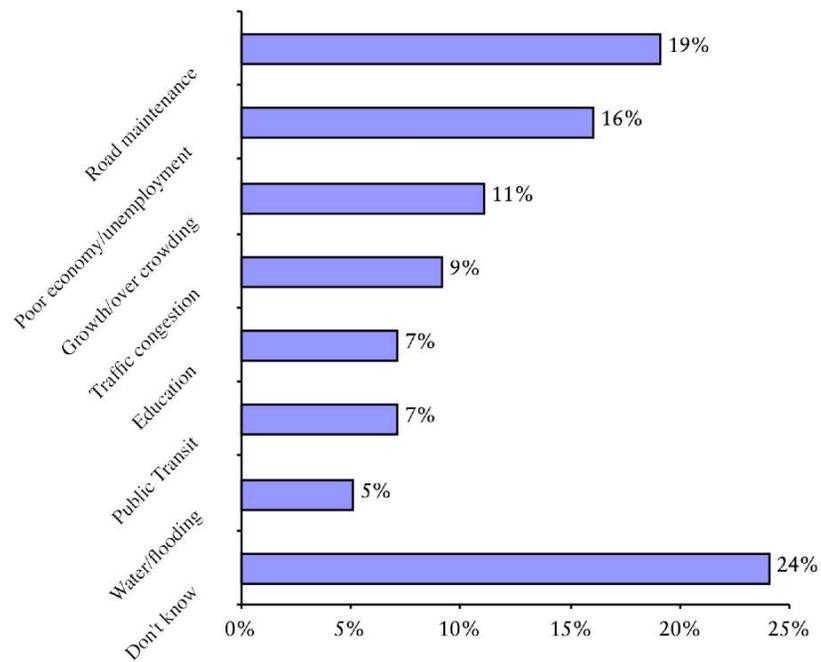
### **Road Maintenance is #1 Issue Facing County.**

When asked to state the most important issues facing Napa County in 2010, road maintenance was mentioned by 19% of the public, more often than the poor economy and unemployment. This was true for nearly every group examined including seniors, the employed, City of Napa residents, most income groups (under \$15,000 a year through \$49,999 a year), people who believe traffic congestion is an issue all of the time, and both men and women.

The second and third most mentioned issues were the poor economy/unemployment and growth/overcrowding.

One-in-four (24%) County residents could not name a most important issue, an important finding by itself. People may be relatively satisfied with the current state of the County, seniors in particular. A key difference is shown with 19% of those employed not naming a most important issue compared to 28% of retirees (29% for those 65 or older).

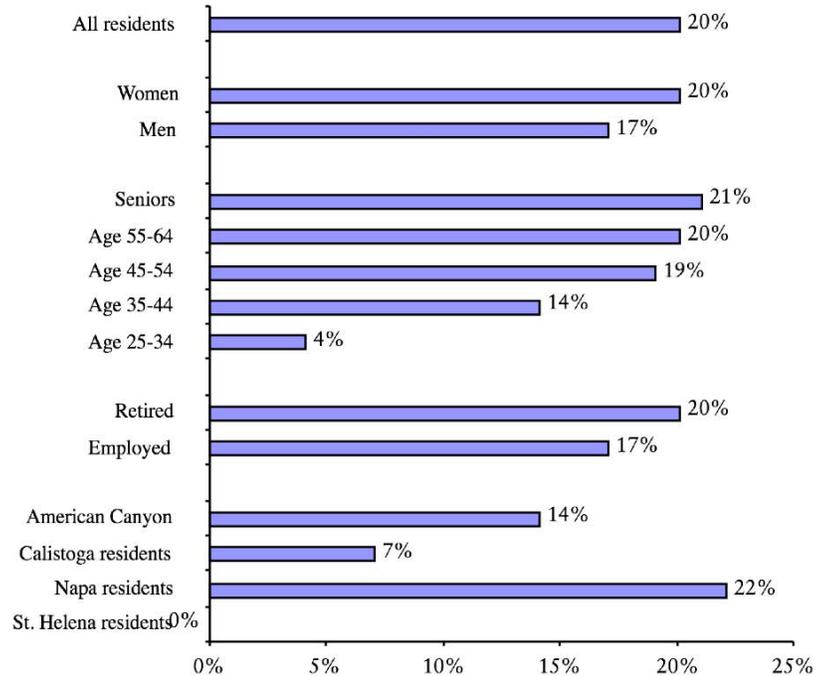
## Most Important Issues Facing County in 2010



Several interesting differences were identified by the segmentations.

- American Canyon residents named public transit as the number one issue, road maintenance was relatively unimportant. There were only 14 interviews among American Canyon residents so the result should be not be considered as a significant finding. Road maintenance also was not important for Calistoga or St. Helena residents.
- Age makes a difference. For seniors, road maintenance is number one, for the age group 55 to 64 it is tied for first, and as age decreases it becomes relatively less important.
- Commuters identified as Very Likely to ride transit identified road maintenance third among the most important issues, behind public transit and traffic congestion.

## Traffic as Most Important Issue Facing County in 2010



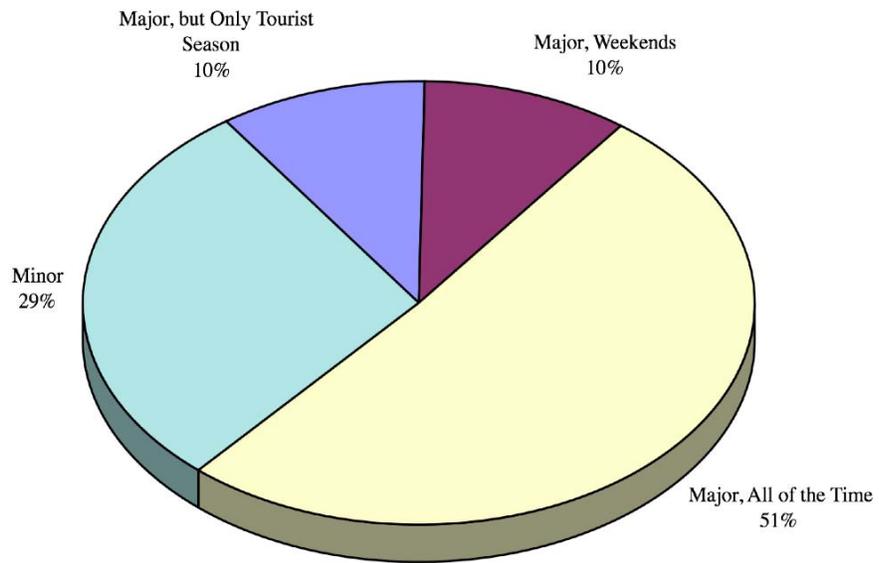
### **When Prodded, Traffic Congestion is Seen as a Growing Problem by a Majority of Residents.**

When asked specifically about traffic congestion, half of the residents (51%) say it is an issue all of the time. Only 9% mentioned it as an issue when there was no prodding.

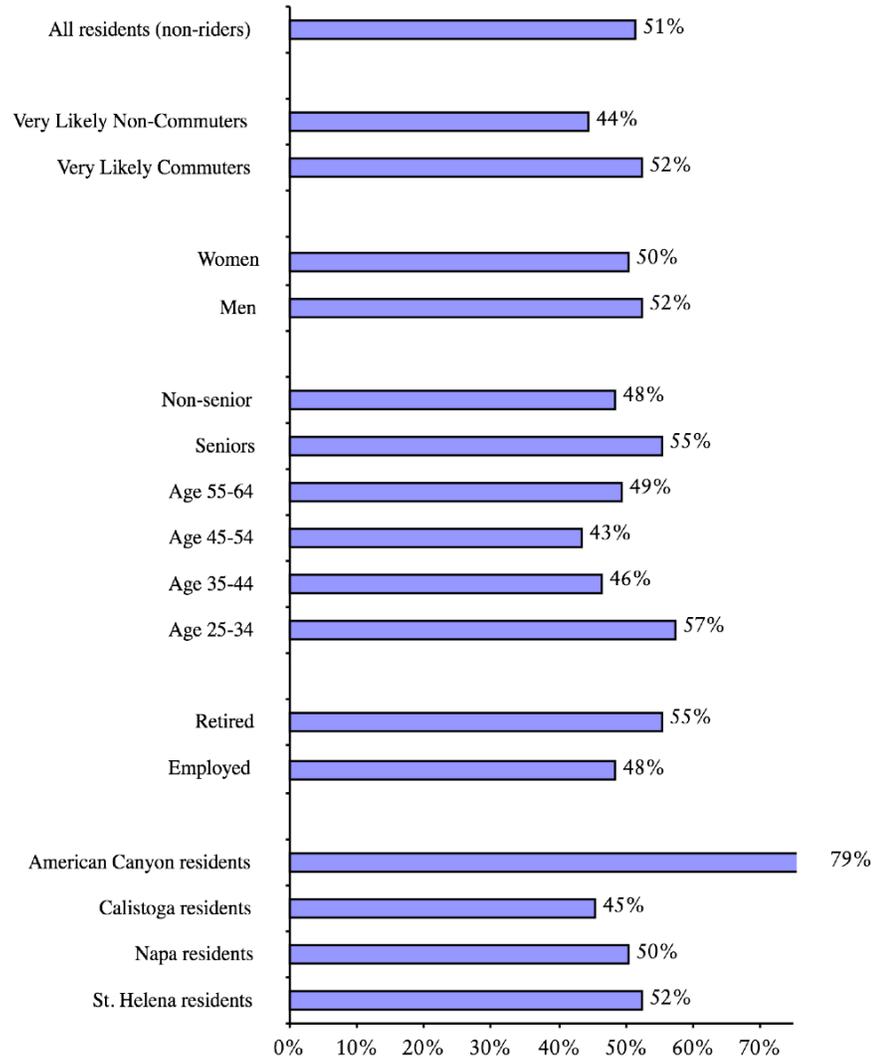
Among the cities in the county, American Canyon residents are far above the rest in their view of traffic congestion with 79% saying it is a major issue all of the time. Seniors are also more sensitive to the issue than non-seniors (55% as compared to 48%).

Traffic is not a particularly sensitive issue with those people who are commuters and very likely bus riders. It is much less of an issue for the non-commuters who are very likely bus riders.

### Traffic Congestion, Non-Riders, 2010



## Traffic Congestion is Major Issue All of the Time, 2010



### **No one solution to congestion captures the interest of the public.**

Seven possible solutions to traffic congestion were tested with people who view traffic congestion as a major issue (71% of the total), and no one option gains more than 35% strong support. Even widening existing freeways and highways is seen by only 30% as a high priority. This option is closest to the number one issue stated by the public, road maintenance, and clearly widening existing roads and highways is not seen as road maintenance. The one exception is residents of American Canyon where 58% rated the solution as a high priority (note: only 14 interviews in American Canyon).

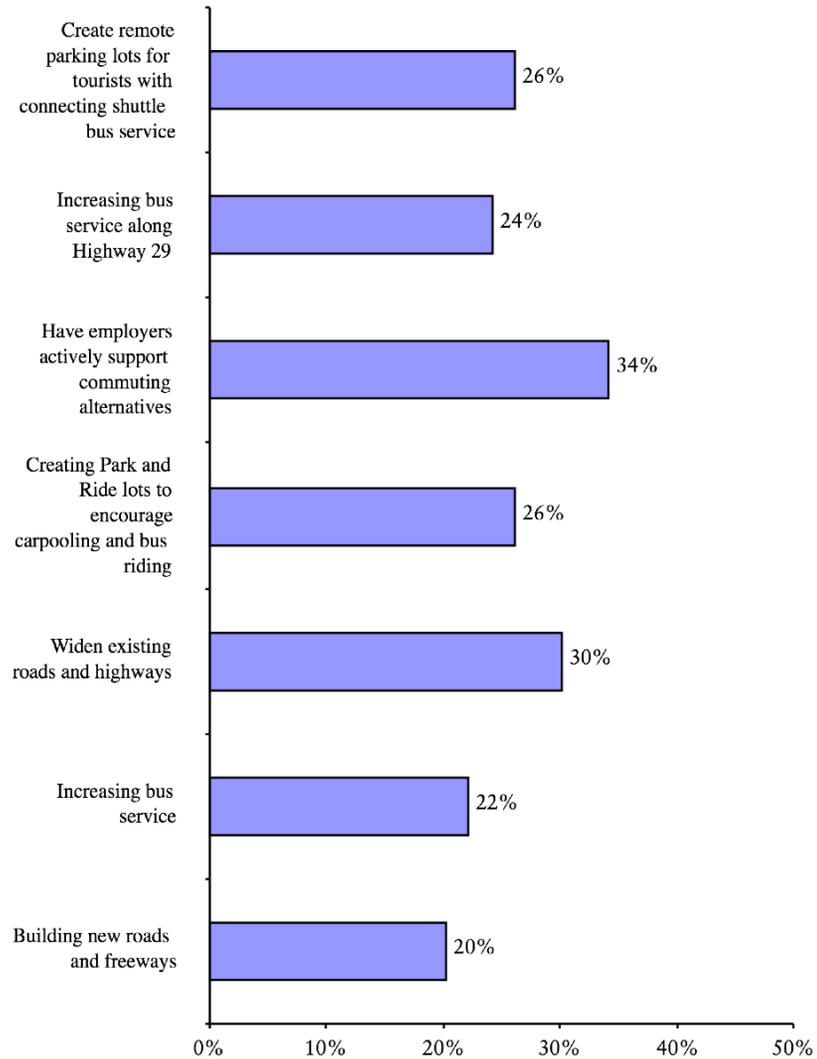
Increasing bus service is seen as a high priority by only 22% of the public (those saying traffic is a major issue). It gains more support from those who are very likely riders (46% from commuters, 28% from non-commuters), but only 19% support from retirees. Residents of the city of Napa also provide lukewarm support as 20% see increased transit service as a high priority solution to traffic congestion.

Creating Park and Ride lots to encourage bus riding and carpooling gains a high priority rating from 44% of those people who are very likely bus riders. This option is also slightly higher rated for women than men, American Canyon residents and from those 45-64 years of age. In addition, high ratings are recorded for the option 'increasing bus service along Highway 29' by both very likely commuters and non-commuters. These higher ratings may indicate that part of the strategy for increasing ridership among commuters and non-commuters involves increasing access to the service by building more Park and Ride lots located along Highway 29.

Among the seven options, having employers actively support commuting alternatives gains the highest rating. It gains the highest support among those employed (40%), and lower support from retirees (28%). Very likely commuters are supporters (48%) as are very likely non-commuters (58%). There is strong support from American Canyon residents (75%).

The one tourist-related option, remote parking lots with connecting shuttle bus service, is rated a priority by 26%. It receives higher support from very likely commuter and non-commuter bus riders, and from residents of Yountville and Calistoga (note: only nine interviews in Yountville, 22 in Calistoga).

## Proposed Solutions to Traffic Congestion, Non-Riders, 2010



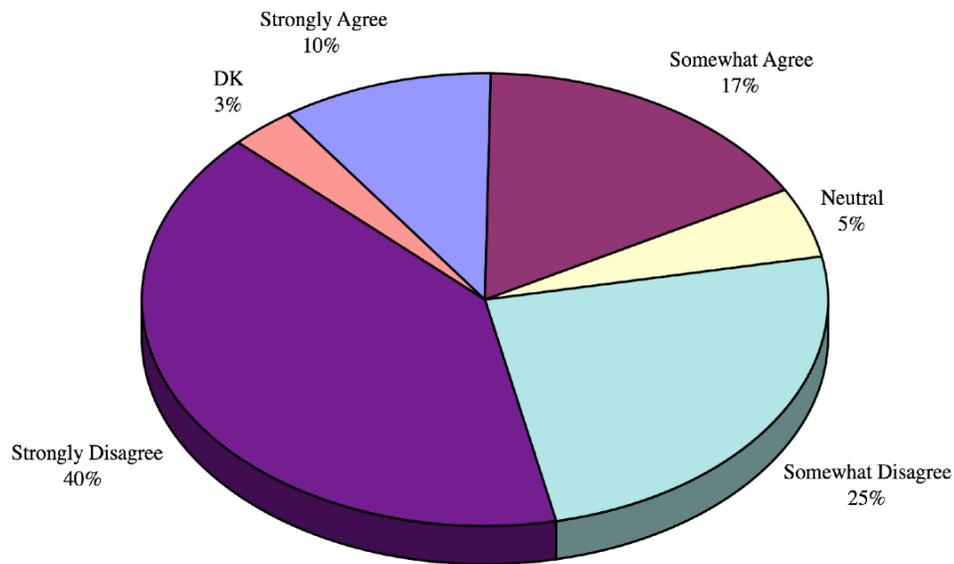
### **Two-thirds of the public see a multi-modal solution.**

The responses to the question “Building and widening roads is the only solution to traffic congestion” is used to define public support for a multi-modal solution, and the portion of the public that may not support increased transit development. Four-in-ten county residents (who are not riding the bus) strongly disagree with the statement meaning they are strong supporters of a multi-modal solution. An additional 25% somewhat disagree yielding a total of 65% of the public that supports a solution to traffic congestion that is more than building and widening roads.

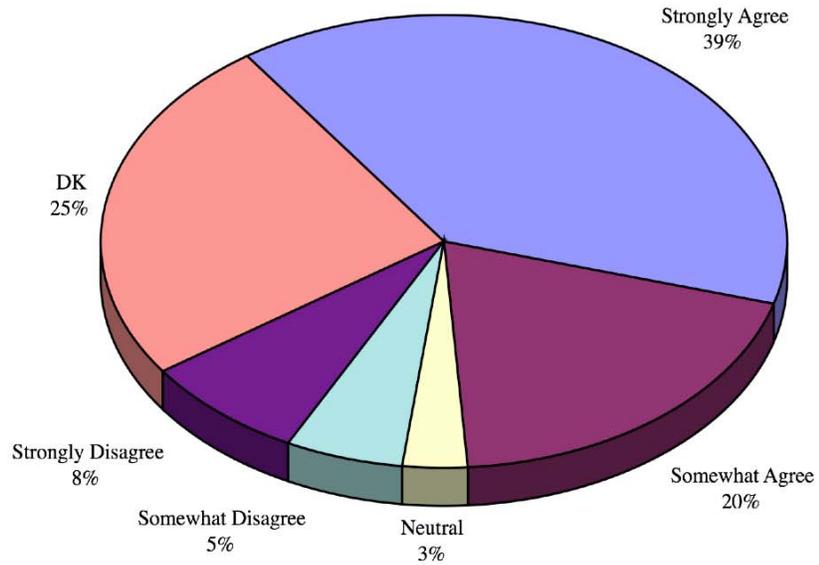
Those that agree with the statement (10% strongly agree, 17% somewhat agree) define the size of the group that would be expected to not support additional (larger scale than at present) transit development in the county. Slightly less support is shown by those retired (only 60%), and people with incomes under \$35,000 a year (support is higher in the higher income brackets). Women show slightly less support than men (63%, 69%). Residents in American Canyon are not strong supporters of a multi-modal solution.

The size of the non-support group is further defined by the responses to the questions “We are going to have to change our attitudes about how we use our cars” and “Money spent on public transit services in Napa County is a good investment”. For both these questions the total of those that disagree is only 18%, notably less than the 27% of non-support when the wording references a link to solving traffic congestion.

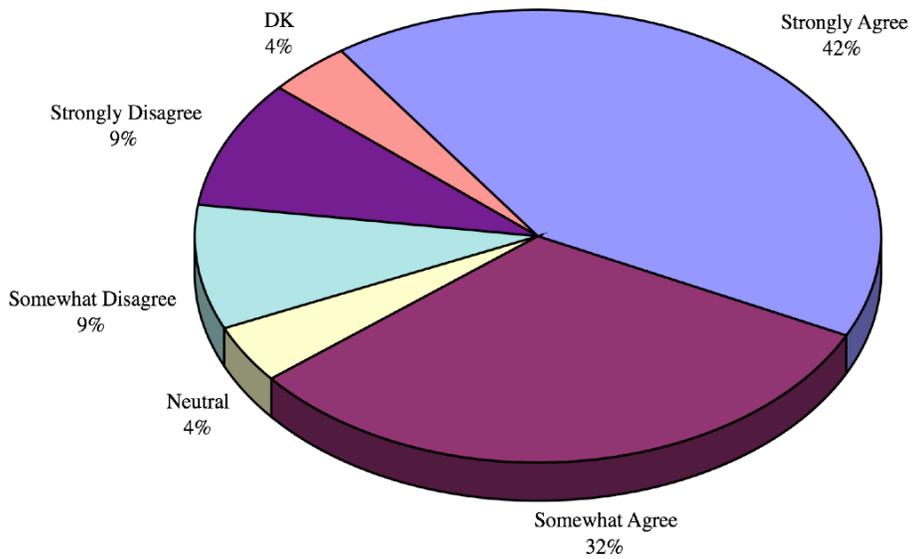
### **Building and Widening Roads is the Only Solution to Traffic Congestion, Non-Riders, 2010**



**We are Going to Have to Change our Attitudes About How We Use Our Cars,  
Non-Riders, 2010**



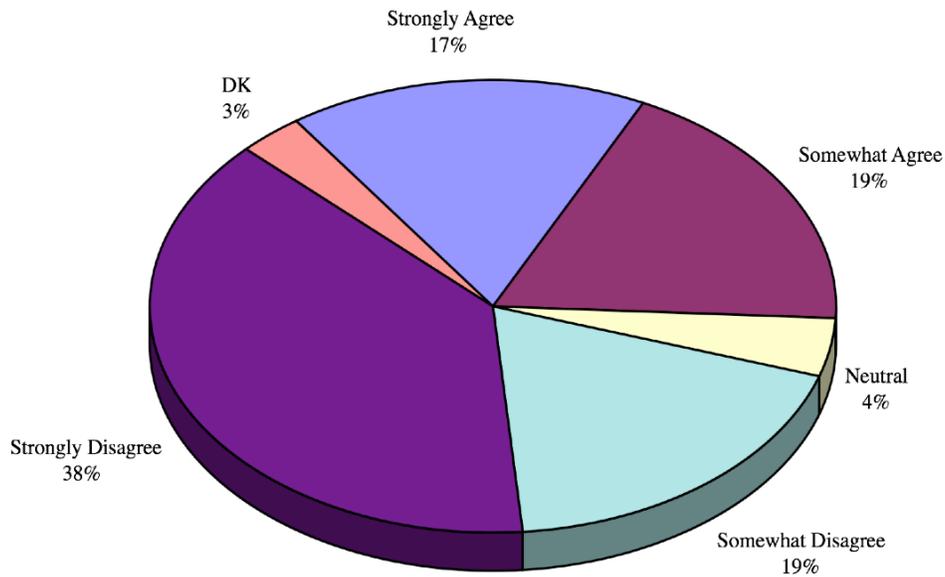
**Money Spent on Public Transit is a Good Investment, Non-Riders, 2010**



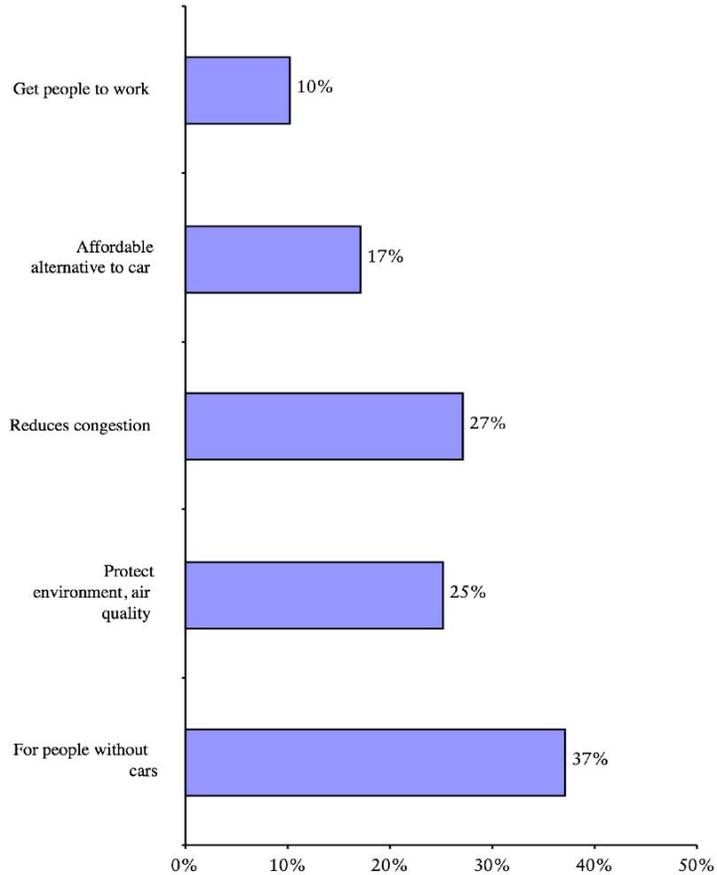
**A sizable number of seniors see transit as just for those without cars or who cannot drive.**

The results by seniors for two questions infer about four-in-ten have a limited view of transit's role and benefit. When asked to name the greatest benefits of public transit 44% stated 'for people without cars', the highest mention of 20 different responses. When asked to agree or disagree with the statement "Public transit is just for those who cannot afford a car or who cannot drive", a total of 36% indicated they agree with the statement. These responses indicate while many seniors do understand a larger role and benefits for public transit, these opinions are far from unanimous.

**Public transit is Just for Those who Cannot Afford a Car or Who Cannot Drive, Seniors, 2010**



## Greatest Benefits of Public Transit, Seniors, 2010



### **Trails for biking and walking, and shuttle services from Park and Ride lots have some appeal.**

Five new types of transportation options were tested with the non-riding public to see if any would capture the imagination of the public. The options included increasing taxi service, more trails for biking and walking, express buses to major events in Oakland and San Francisco, Park and Ride lots along Highway 29 and shuttle bus services for tourists from parking lots.

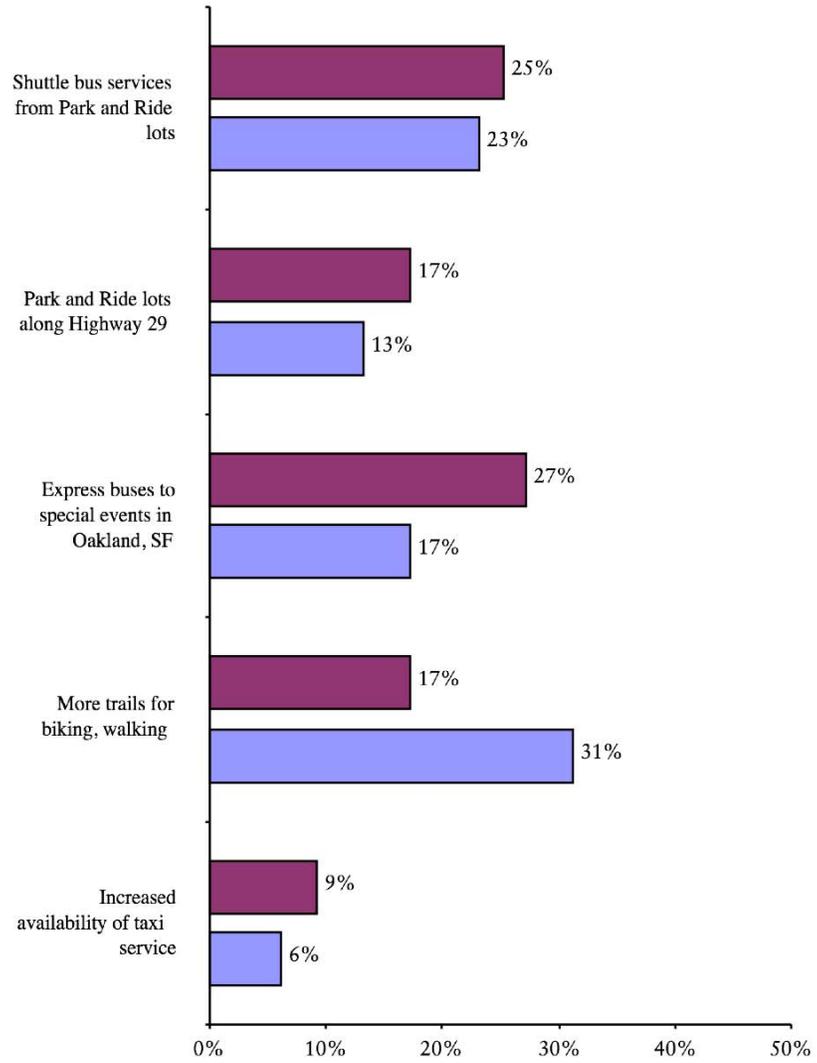
More trails for walking and biking is the first priority (among the five) by 31% of the public (non-riders). An additional 17% had it as their second priority. While shuttle services from Park and Ride lots was a first priority for only 23% of the public, when the second priority choices are added in the total equals the 48% for more trails for biking and walking.

A total of 48%, however, is not a majority of public opinion for either option. This may be a result of the lack of appeal of the options presented, or more likely an indication that transportation development (other than road maintenance) is not the highest priority.

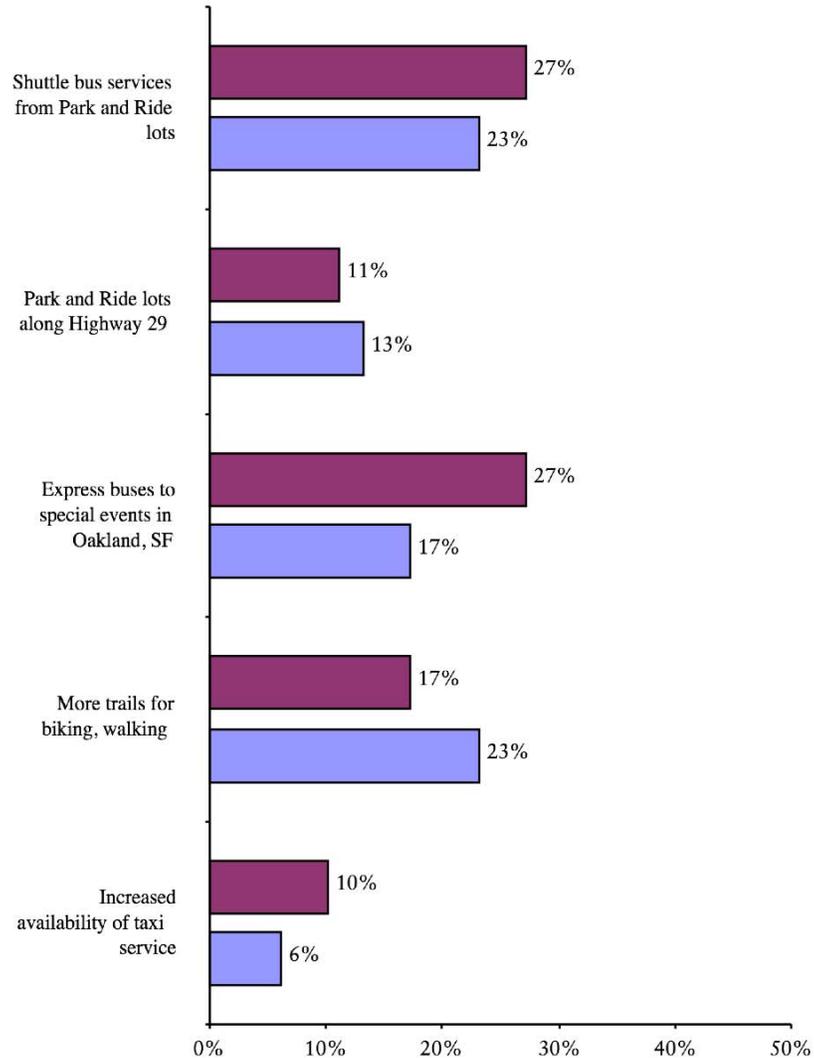
Seniors have lower scores for more trails for biking and walking (as the first priority), and less for Park and Ride lots along highway 29 as their second priority.

More trails for biking and walking is very appealing to younger residents, especially those 25 to 34. Six-in-ten (61%) of this group had it as their first priority. It also has appeal among those with incomes above \$100,000 (44% as first priority) and people who are employed (40% as a first priority).

## New Transportation Option Priorities, Non-Riders, 2010



## New Transportation Option Priorities, Seniors, 2010



### Increased availability of information is a high priority among non-riders and seniors

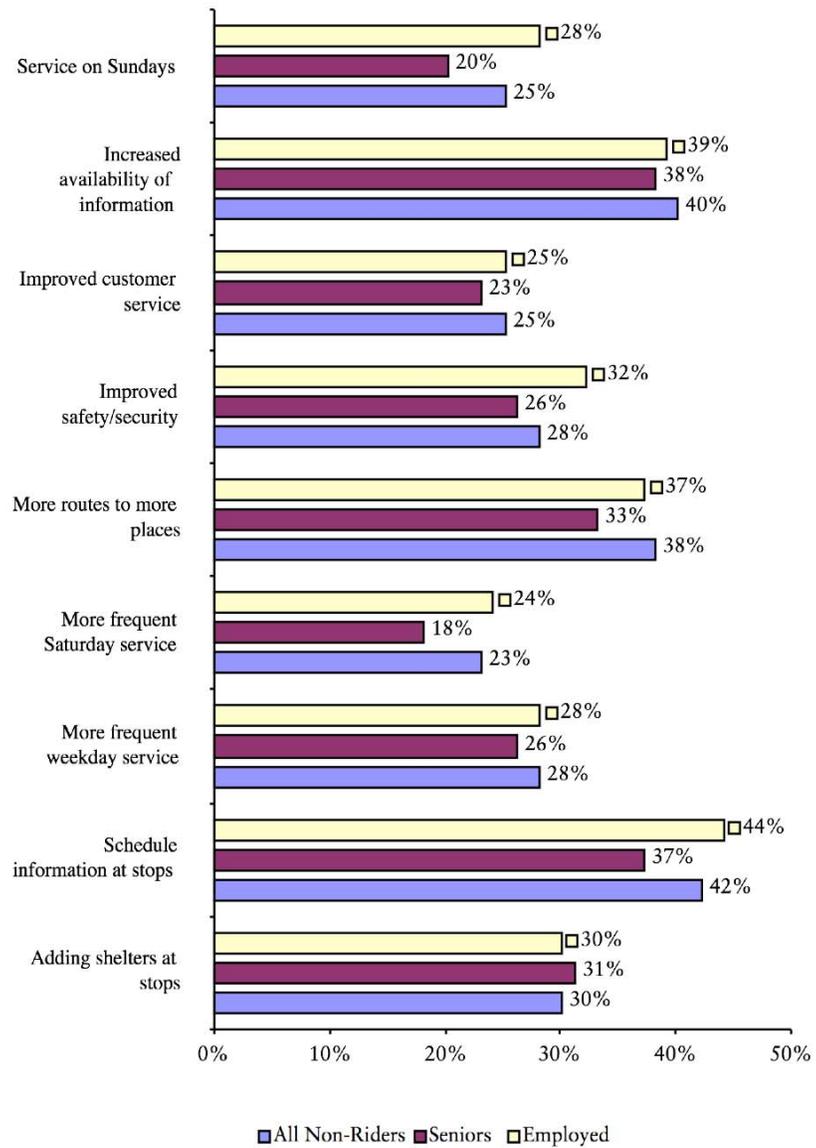
Nine transit improvement options were presented and respondents asked to provide a priority from low to high. The results show that improving information availability and adding schedule information at stops are the highest rated by all non-riders, seniors and those who are employed.

The second chart displays the results by city (numbers for American Canyon and Yountville need to be read with care as there were less than 25 interviews).

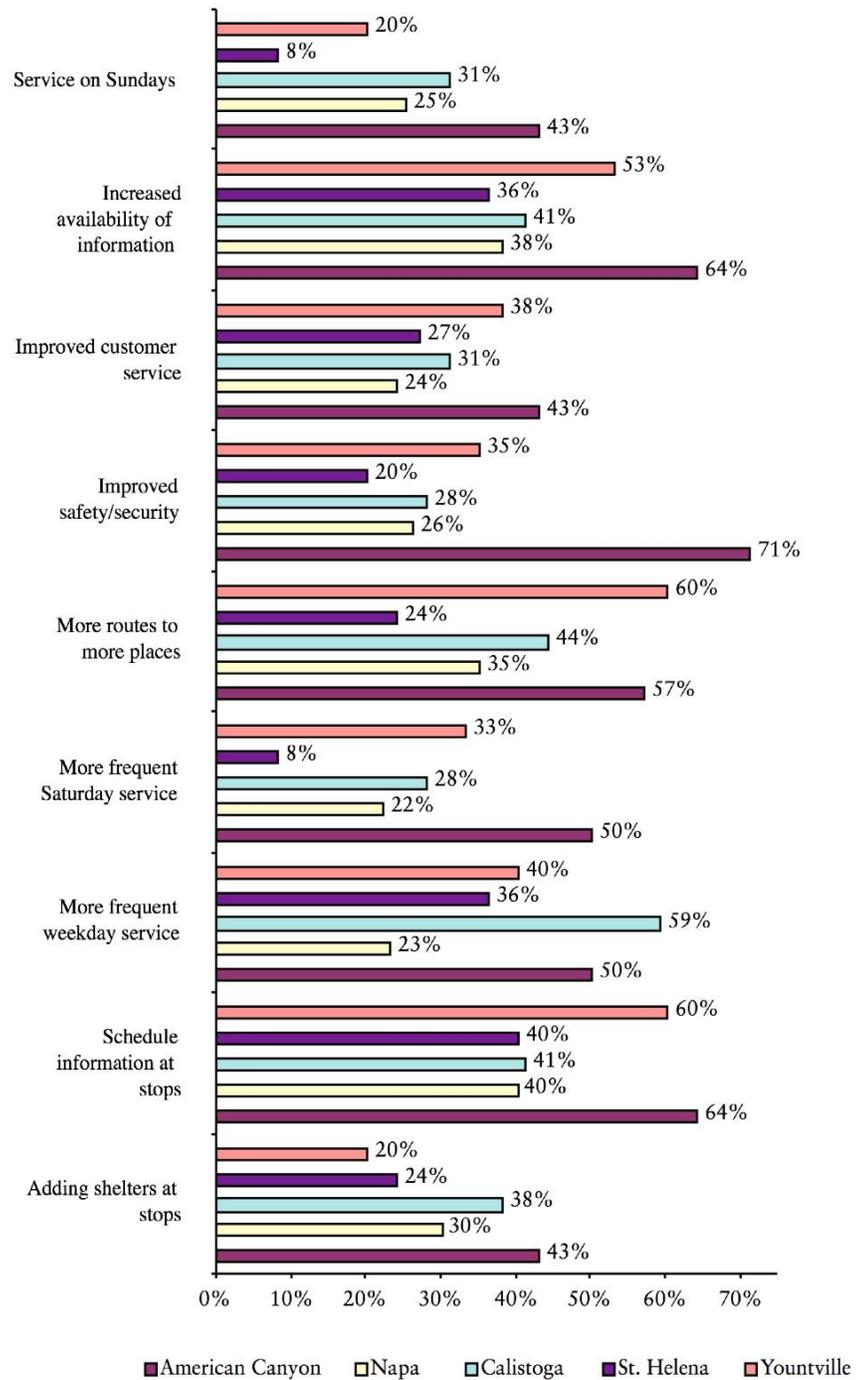
- Adding information at stops: American Canyon and Yountville
- Increased information: American Canyon and Yountville

- Increased weekday service: Calistoga
- Increased Saturday service: American Canyon
- More routes to more places: Yountville and American Canyon
- Improved safety and security: American Canyon

**Transit Improvement Priorities, Non-Riders, 2010**



## Transit Improvement Priorities, By City, 2010



## **Implications for Market Planning**

### **Road Maintenance as #1 is Good**

In the 25-plus years we have been surveying the public on transit and transportation development issues we have never seen a community rate road maintenance as the number one issue or even close to the top. Relative to any number of other community or transportation issues, road maintenance is a fairly easy and inexpensive issue to fix.

### **Talking about Traffic**

Traffic can be a little like the weather. The public is constantly being reminded about it by the media, the subject is easy to talk about, and most people drive every day and the opportunity to experience some form of congestion is high. But, traffic congestion was only fourth among the issues identified. When prodded, only half of the community see traffic congestion as an issue “all of the time”. Close to one-in-three (29%) do not see traffic as an issue at all, and the remainder see it related to tourism.

Based on the results, traffic seems more a topic of conversation than an actual concern, one that large numbers of citizens are demanding immediate action. This situation places an organization such as NVTPA, responsible for transportation planning and transit, in the position of needing to raise the issue to a higher level of concern. NVTPA understands transportation and transit improvement programs require years for design, implementation and funding approvals. They know as a community grows traffic and congestion will grow too, so it is a matter of time before Napa County reaches a tipping point where solutions and action are demanded.

This strategy requires an aggressive and on-going public education program. This program should be above and beyond any project-related efforts or programs associated with updates of a long-range plan. It needs to educate the public about traffic, link the ability to grow and keep ‘Napa like Napa’, and stress the need to implement transportation and transit improvement projects to protect the lifestyle.

### **A Multi-Modal Solution**

It is clear from the results that the public prefers a solution that is balanced and a combination of projects, large and small. There is no one improvement preferred by the public. They will respond to a combination that makes sense to them. Right now, it is not obvious what that combination might be. We suspect the public ‘will know it when we see it’.

### **People’s Solutions are Local**

It appears from the data that most people are focused on local, community-based transportation concerns than issues on a countywide scale. This presents another communication challenge for NCTPA, getting people to understand a bigger picture and the linkages among all the various parts at the same time addressing local concerns.

### **American Canyon has Potential**

Whether because of its location, size or demographic make-up, American Canyon residents seem to have some different opinions from the residents of other Napa County cities/towns. Unfortunately, there were too few interviews conducted among American Canyon residents to make any specific recommendations. But, based on those few interviews and in-field observations, we believe there are opportunities in American Canyon for transit development and increasing ridership.