LIVERMORE AMADOR VALLEY TRANSIT AUTHORITY

S T A F F   R E P O R T

SUBJECT: SmartTrips Pleasanton Report and Presentation

FROM: Tony McCaulay, Marketing Manager

DATE: November 28, 2017

Action Requested
Receive an update on the SmartTrips Pleasanton project and review final report.

Background
With the recent bus system redesign, Route 10 became a Rapid route (now labeled the 10R) and features 15-minute all day frequency. Within Pleasanton on Santa Rita Road, West Las Positas and Owens Drive the Rapid is new to customers and offers the convenience of quality public transportation into the Dublin/Pleasanton BART station. To introduce the new, more frequent Rapid route to residents, LAVTA received a grant from MTC to implement a marketing technique along the Rapid corridor in Pleasanton known as Personalized Travel Planning (PTP). PTP is defined as a technique that delivers information, incentives and motivation to individuals to help them voluntarily make sustainable travel choices. It seeks to overcome habitual use of the car, enabling more journeys to be made on foot, by bike, bus, train or shared cars.

In October of 2016 the LAVTA Board awarded the firm Steer Davies Gleave a contract to implement PTP on the new Rapid corridor in Pleasanton and report on the results. The goal of the program, aptly named SmartTrips Pleasanton, was to increase ridership 15% on the Rapid in the program area within a 12 month time period.

Discussion
The final report on SmartTrips Pleasanton is attached.   Lisa Buchanan, the lead project manager for Steer Davies Gleave, will be at the December 4th Board meeting to present a summary of the project and the goals achieved. The most recent October ridership information shows that boardings in the SmartTrips Pleasanton corridor have increased from 10,948 in October of 2016 to 12,717 in October 2017, a 16% increase.

Next Steps
The next steps in the SmartTrips Pleasanton corridor will be to continue marketing outreach to reinforce and expand upon the efforts of the individualized marketing project. In addition, lessons learned from this effort will help guide a similar effort planned along the Route 30R Dublin Boulevard corridor.

Recommendation
None – Information only.

Attachment
1 – SmartTrips Pleasanton Final Report

Approved: _____

steer davies gleave

SmartTrips Pleasanton

Livermore Amador Valley Transit Authority

Final Report
November 2017

Our ref: 23031901

steer davies gleave

SmartTrips Pleasanton	Livermore Amador Valley Transit Authority
Final Report November 2017	Our ref: 23031901

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Contents

Figures

Tables

Appendices

1 Introduction

Background

The aim of SmartTrips Pleasanton was to inform residents living within a walking distance of the 10R Tri-Valley Rapid of recent service improvements, increased frequency and new bus features, and encourage more people to use the service.

SmartTrips deployed a team of Travel Advisors (TAs) to hold motivational conversations with residents of the target area, speaking with them on their current travel choices and transportation options. The TA team worked with participants to identify alternative transportation options to driving alone, and deliver to their door personalized information and support to help them try new ways of getting around, including riding the bus, carpooling, biking and walking instead of driving alone.

The SmartTrips Pleasanton team spoke with 1,503 households and got 395 program participants at residences, and over 400 program participants at events, over a 10-week outreach period. Information was hand delivered to an additional 1100 residences about the bus service.

Program Goals

A number of elements were agreed to be included in the program:

- Visits to 4,000 households on up to three occasions, at different times of day, to talk to them about their travel options and promote the bus service. The visits were to be made by trained Travel Advisors. The target households were to be:
  - All 3,000 households within ¼ mile of the Santa Rita Road
  - Approx. 500 households within ¼ mile at the southernmost end of Owens Road.
  - Approx. 500 households along Santa Rita Road located between ¼ and ½ mile from the route, but nearest the actual stops to minimize distance.
- Hand deliver a Neighborhood map and Route 10 schedule to all households within ¼ and ½ mile of the Santa Rita Road not receiving a visit (approx. 1100 households) including a postcard inviting them to "opt in" to the program.
- Work with the Hacienda Business Park to agree on an outreach program to current and new residents to promote the bus service to downtown.
- Set up and staff (with trained travel advisers) table top events at the BART station during the AM period. If successful, table up to 5 similar events during the project implementation.
- Attend five events in the community, for example at the Farmers Market and events organized by Pleasanton Downtown Association which have a local bias.

What is Personalized Travel Planning?

The approach for the project was based on a social marketing technique widely adopted in the UK called Personalized Travel Planning (PTP). PTP is defined by the UK Department for Transport as "a technique that delivers information, incentives and motivation to individuals to help them voluntarily make sustainable travel choices. It seeks to overcome habitual use of the car, enabling more journeys to be made on foot, by bike, bus, train or shared cars".

PTP is a conversation between a Travel Advisor and a resident, usually on the resident's doorstep. During the conversation, the Travel Advisor will seek to establish current travel patterns and frustrations with travel options. Travel Advisors help residents identify and suggest alternatives to taking the car that they could use, and offer suitable resources such as maps or information leaflets, which can help the resident try out their new solution. These resources are then delivered to the resident at a later date, which offers a second opportunity for the team to promote the project and answer any additional questions the resident may have.

At the core of the Personalized Travel Planning method is the belief that the conversation between the Travel Advisor and the resident is instrumental in motivating individuals to commit to long term change in their travel behavior. Upon contact with the household, Travel Advisors engaged in an open conversation with the resident about their travel habits and how SmartTrips Pleasanton was able to support or encourage them to make (or continue to make) sustainable travel choices.

The structure of these conversations was based around the principles of Motivational Interviewing, with an emphasis on providing a non-judgmental audience and space for a resident to explore and reflect upon their travel habits and how or why they may wish to change them. The Motivational Interviewing approach has been successfully adapted from the health sector, where it is commonly used for influencing lifestyle behaviors such as exercise, diet and alcohol consumption. The approach recognizes that participants are engaged with varying levels of readiness to change their behavior, and that a willingness to explore where they are at in their process is typically more fruitful than forcing commitments they are not yet ready to make. Ultimately, Motivational Interviewing attempts to have participants think differently about their behavior and consider what might be gained through change.

Report Structure

This report is structured as follows:

- Project Approach: outlines the process of project set-up including team recruitment and training. This section also provides additional context on the Motivational Interviewing techniques used in the conversations with participants.
- Contact and Engagement Outcomes: examines engagement rates for the project, the resources distributed and an overview of the behavior change observed as a result of the project.
- Lessons Learned: reflects on the experience of project delivery for this groundbreaking project and makes suggestions for future implementation.

2   Project Approach

Target Area

The target area for this project was households close to the 10R Tri-Valley Rapid bus route on Santa Rita Rd. and Owens Dr. This area was selected for two primary reasons:

- Rapid was a new brand in the corridor, with new improved 15 minute frequencies for much of the day. This improvement in service would provide something tangible to promote to residents.
- Using the bus instead of the car would be competitive, in terms of both time and money, for travel to the BART station.

The project aim was to target all households within a ¼ mile walkshed of the 10R with an in person visit. The area between a ¼ and ½ mile distance from the route was the target area for the delivery of the 1,100 information packets.

We worked with City of Pleasanton to obtain household addresses in the target area and those locations are shown in Figure 2.1. Due to the lower number of available households within that walkshed than LAVTA had previously been advised, we adjusted our program goals slightly to include a visit to households at apartment complexes associated with the Hacienda Business Park.

A site visit, and desktop research, took place to assess the suitability of the area for household visits by travel adviser staff. A small number of concerns were identified, including the number of cul de sacs increasing real and perceived walk times from the bus stops, as well as an older population who may be less receptive to changing their behavior. However, on balance it was felt that careful planning could still result in more people using the bus in this corridor due to the much improved service.

The information packets were delivered to households situated between a ¼ and ½ mile of the 10R route. When distributing information packets, the Travel Advisor teams prioritized continuous streets, so streets where part of the street had received a household visit, or ensuring every door on a long street was provided an information packet. This strategy was used to ensure that specific households within a street did not feel "passed over" while their neighbors received resources and the option to request incentives.

Figure 2.1 shows the streets where residences were visited (blue) and those where information packs were delivered (green)

Figure 2.1: Project Area

Legend

- Household Visit
- Information Packet
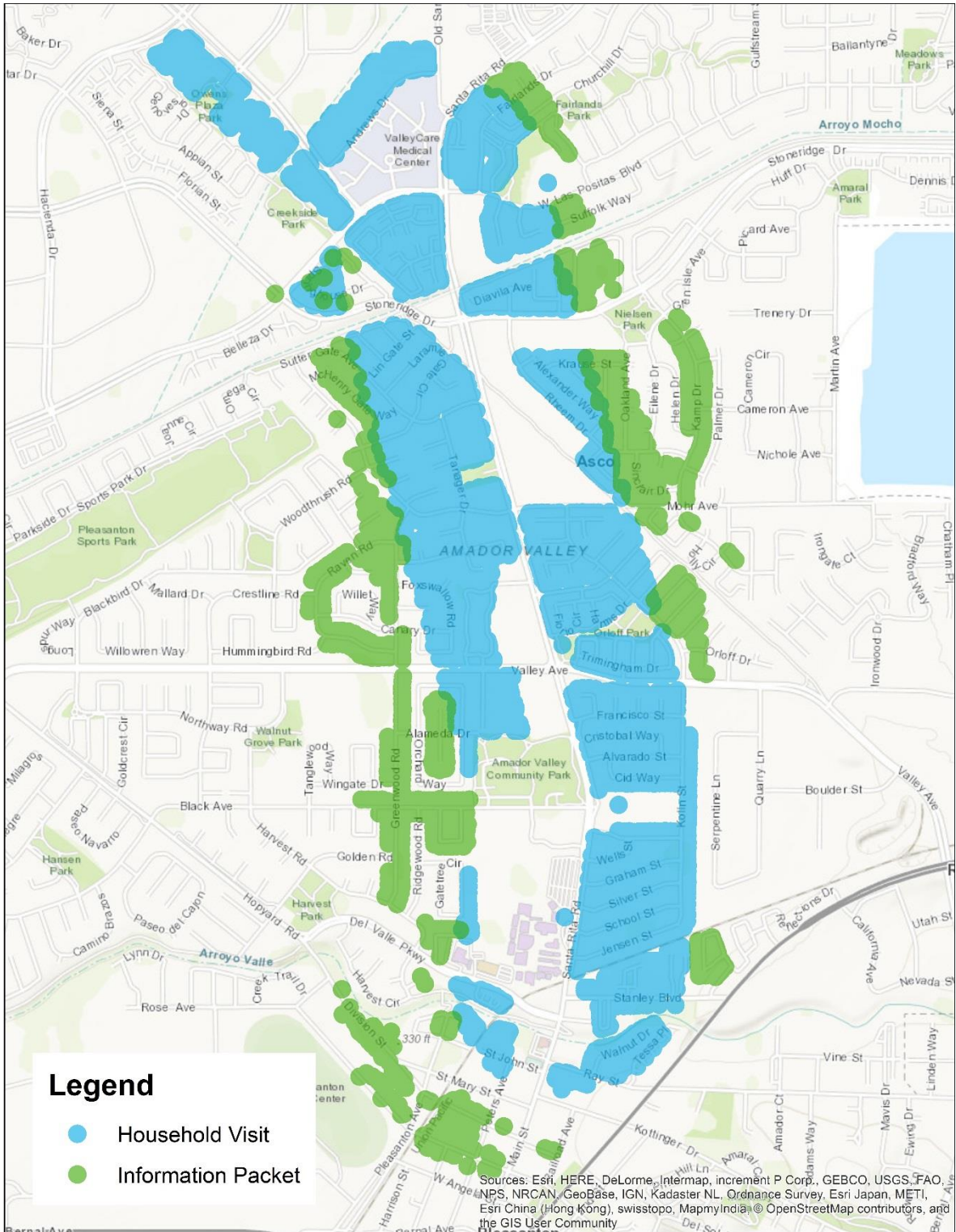
Recruitment & Training

Recruitment of a team of outreach staff was necessary to implement the door-to-door conversations. The recruitment process aimed to bring on a Team Leader to coordinate the team's day to day work, perform data entry and monitoring, and provide a daily communication link between the team on the ground and the project manager and coordinator. The need for an additional 3-4 travel advisors to go door-to-door was anticipated.

The Travel Advisor job advertisements were first disseminated through LAVTA contacts and stakeholders, and posted to various online job boards. The position was distributed as follows:

- Indeed (with regular reposts)
- Tri-Valley Jobs Board
- Distributed to various colleges in the area including a posting at Las Positas College
- Sent to stakeholders (ie. Bike Eastbay)
- Posts to social media
- Put up job posters in local stores and cafes

Recruitment was a challenge for this project. The job announcement was posted through multiple channels and was often updated and reposted, however, getting qualified applicants to apply for the positions was a significant challenge. The temporary nature of the position was in a couple cases given as a non-starter for applicants offered interviews. One-on-one interviews were conducted with each applicant with two staff members. Applicants were asked to respond to a mix of questions assessing understanding of project goals as well as general ability to communicate effectively with local residents.

The Travel Advisors were trained for the door-to-door outreach over the first three days of the project. TAs were given background on the project and the 10R service improvement, Wheels, and were trained to hold the motivational conversations with residents, fill out household forms and manage their progress. The training focused intensively on the conversations, as this element of their work is the most important element in encouraging folks to try a new way of traveling or make a larger commitment to an alternative to driving. The first two and a half days were classroom based training at LAVTA office and the second half of the third day of training was supported door-knocking. The team were also provided the opportunity to board a 10R bus which was brought to training on the first day; this created an opportunity for them to be shown the new features of the bus serving the project area including free WiFi, charging points and a smart interior.

Some elements of the classroom-based training on motivational interviewing include:

Theory	Building Blocks	Applications
Individualized Marketing	Opening lines	Open vs. closed question drawing exercise
Advising Vs. Motivating	Open questions	Exercise extracting information
	Listening, reflecting, guiding, exploring motivations	Rolling with resistance
	Responding to change talk, resistance and calls to action	Scenario cards

Training was also used to ensure that that team understood how to use the Household Forms, Street Sheets, and visit outcome codes correctly.

An essential part of the training was repeated role play, to give trainees the opportunity to apply what they are learning as they are building their understanding of it. Role play was used to practice general conversation, and as ability developed additional elements were added in such as resistance and use of the resources and Household Form.

The team also received training on health and safety in the field. This training aims to prepare Travel Advisors to handle any situations they may face, and have what they need for their day to day work, all in order to minimize any risks of health or safety incidents.

The in-field half day training was aimed at easing the Travel Advisors into outreach and building their confidence and performance with the motivational conversations. This was approached through supportive techniques including shadowing, working in groups, debriefing, and transition of conversation leadership.

It is policy for Travel Advisor staff to always wear an ID badge while out in the field. LAVTA was generous in providing staff with Wheels IDs that also allowed them to use the bus service during the implementation period. This proved to be invaluable to the ability of the team to travel to and from the neighborhoods from the project office, and help them form a strong familiarity with the 10R bus to inform their work.

Door-to-Door Engagement

Motivational Interviewing

The door-to-door engagement phase of the project ran for 10 weeks from March 23rd to May 31st. Travel Advisors worked between the hours of 11:00 a.m. and 7:00 p.m. from Tuesday to Friday; and 10:00 a.m. to 6:00 p.m. on Saturdays. The team went door to door in the project area, first delivering a door hanger to inform each household of the upcoming visit, and then attempting to contact each household on up to three occasions at different times of the day and during the weekend.

Travel advisors received a mixed response to door-to-door outreach. Residents who agreed to speak with Travel Advisors provided very positive feedback about their interaction with the team. Reasons given for not wanting to participate in the project included:

- Already knowing their neighborhood well enough:
- Public transportation options not being suitable for their trips
- An aversion to transit.

A number of those contacted also declined to participate without offering a reason.

Resource Fulfillment

Steer Davies Gleave's custom database was used for the project to assist in management and monitoring. The database recorded visit outcomes (including time, date and the Travel Advisor making the visit) and resources requested by residents. The database also held residents' contact details to allow for follow-up if the resident had agreed to this and responses to the baseline questions (see below).

The design of the fulfillment and delivery process had two priorities:

- To deliver all the requested resources to the right household in a timely manner; and
- To make delivery of resources as quick and efficient as possible for Travel Advisors.

A conversation form was completed for each participant, and the forms were submitted to the office at the end of each work day. The conversation form example can be found in Appendix A. Some of the fields asked of participants on the household conversation form include:

- Whether participant was aware of the 10R route and that it ran every 15 minutes throughout most of the day;
- How many trips had been taken by bus in the last week;
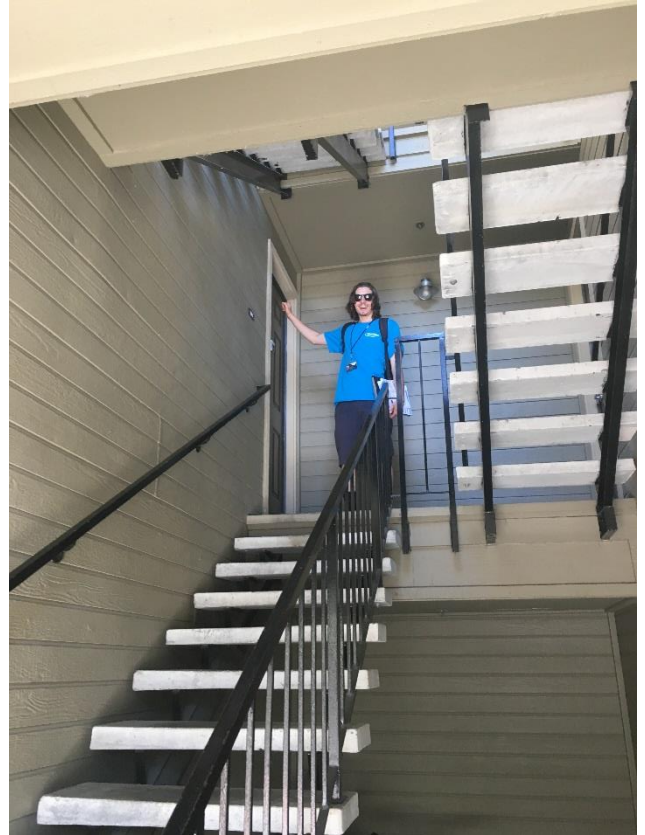
- If participant took BART, how they arrived at the station;
- Weekly commute trips by mode as well as number of non-commute trips per week by each mode;
- Which resources residents were interested in receiving based on interest expressed in certain modes;
- Which incentive the participant would like to receive;
- What type of trips the participant hoped to change and their reason for making the change; and,
- Contact information if they were comfortable providing.

During fulfillment, packing slips and delivery bags were sorted by street and bundled together. Staff filled the bags with requested resources and attached the packing slips to each bag. On delivery days, all staff spent a few hours distributing bags to households.

Events

The SmartTrips Pleasanton team also did outreach to residents at events, both at existing community events like Bike to Work Day and at neighborhood attractions such as the BART Station, Amador Valley Community Park and the Library. At most events, the team would set up a table, engage people in motivational conversations used at the doorstep conversations and fill out participant forms. The exception was during BART station outreach at peak hours, TAs would hand out information and resources to BART patrons as they entered/exited the stations, and would offer to speak with folks more extensively if they had questions or needed assistance.

Information Packets

SmartTrips bags with a mailer for residents to request resources were delivered to 1,100 households between ¼ and ½ mile of the 10R route. As well as the ability to "opt in" to the program, the bag provided information to residents in a more cost effective manner than by making household visits. The bag included a 10R schedule and a Neighborhood map.

Resources & Incentives

A number of resources were made available for the Travel Advisor team to promote to residents on the doorstep. Resources included:

- 10R schedule and a Wheels system map;
- information on riding BART to encourage the use of transit;

- a Clipper Card loaded with loaded value given as an incentive for residents who expressed a desire to try the 10R;
- a Neighborhood Travel Map for the project area, developed specifically for the project, highlighting the 10R route and stops so residents could see how the route relates to their neighborhood;
- a map of trails in Pleasanton was offered to promote active transportation; and
- pedometers and bike doctor vouchers were offered as incentives.

The full list of resources and volumes distributed can be found in Table 2.3 in the next section.

Stakeholders

There was a concerted effort made by the project team to ensure that the community was informed about SmartTrips Pleasanton and expecting the Travel Advisors. Meetings where held with City of Pleasanton staff, Hacienda Business Park, Downtown Pleasanton Association and Bike Eastbay.

2 Contact & Engagement Outcomes

In summary, the project engaged 800 people and made over 3500 impressions. People were either engaged through door to door visits, at events or by receiving information packs at their homes. The success of each of those methods is reported in this section.

2.1 Door-to-Door Engagement

After removing inaccessible households from the target number (apartment units in restricted access buildings), and sample reduction due to households listed incorrectly, temporary dwellings, vacant dwellings or duplicates, a total of 3,434 households (of 3,947) were available to be visited for door-to-door outreach.

Household Outcomes

Of those households contacted, there were a range of responses to the project:

- 2,012 households (59%) were spoken with during an in-person visit. Of those:
    - 395 households (12%) participated in the project by sharing information about how they currently travel and also requesting specific resources and/or incentives.
    - 1,617 households (47%) were spoken to but decided not to participate in the project—top reasons given for non-participation included lack of interest, perceived lack of transportation options, and attachment to current travel behavior.
- 1,422 households (41%) were not spoken with after three attempts at different times of day and on different days of the week. Those households which were not reached were left with a door hanger, encouraging them to visit the program website.
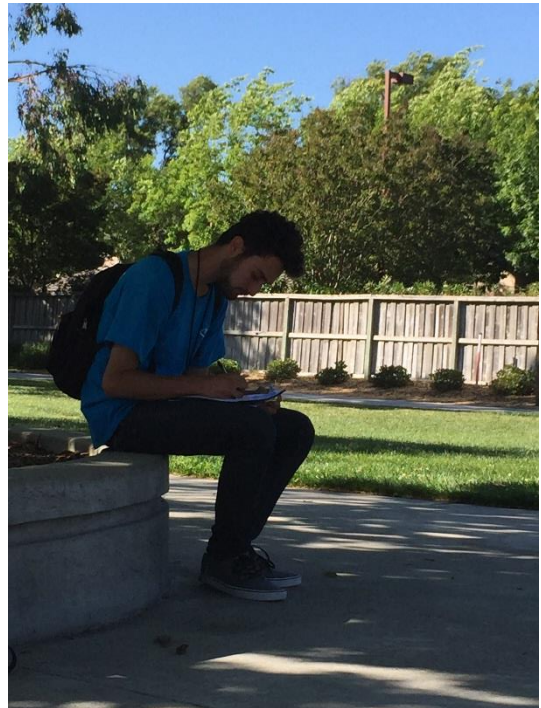
Table 2.1: Door-to-door engagement outcomes

Status	Number of households	% of households
Total households targeted	3,947	
Sample loss	533	15.5%
Total less sample loss	3,434	87.0%
Households Reached	2,012	58.6%
Participating households	395	11.5%
Non-participating households	1,617	47.1%
Households not reached (after 3 attempts)	1,422	41.4%

Participation Rate

Through door to door visits, this project achieved a 12% participation rate in terms of total households, which was lower than expected (typical for this type of project is 25-30%). The percentage of households who chose not to participate when spoken to was correspondingly higher than anticipated (47% versus 35-40% expected) and the potential reasons why are explored in the lessons learned section. These reasons should be understood to inform future work.

Various reasons for non-participation were provided to the Travel Advisors at the doorstep (reported in Table 2.2), though often no reason was given. Common reasons given for non-participation were compiled from the experiences of the travel advisors, shared at the regular team meetings.

Table 2.2: Reasons for non-participation

Common reasons for non-participation
Happy using car, not interested in trying something different
Interested in talking but not in participating/requesting resources
Already travel sustainably
Bus does not go where they need to go
Bad perceptions of bus/concerned of neighbor's perception
Unhappy with being disturbed at home/does not wish to speak with TA
Know their neighborhood, not receptive to information on local transportation
Retired and does not take many trips

Strategies to improve participation developed by the team and used throughout the course of the outreach were as follows:

- Not asking residents if they have time to speak with the TA, instead assuming participation and leading with an open question.

- If residents indicate a specific interest, asking more about that area.
- Asking to describe experiences with different modes.
- Asking about Active Transportation in a recreation context.
- Telling residents that we are interested in their experience, their feedback.
- Using resources to generate interest; based on initial conversation handing resident applicable resources to look at.
- Describing materials as "free resources" rather than as information or fliers.
- Holding conversations in a relaxed manor, conversational rather than questionnaire-style.

2.2   Event Engagement

SmartTrips Team performed outreach at nine events, including participation in existing community events and outreach at heavily frequented places in the community such as the Library and BART station. Below is a summary of event engagement outcomes:

Date	Event/Location	Event Participants	Resources Distributed
13 April 2017	East Dublin/Pleasanton BART Station	41	135
26 April 2017	East Dublin/Pleasanton BART Station	34	220
28 April 2017	East Dublin/Pleasanton BART Station	23	46
30 April 2017	Bike Safety Festival	73	166
04 May 2017	East Dublin/Pleasanton BART Station	81	173
11 May 2017	Bike to Work Day Station	75	375
11 May 2017	East Dublin/Pleasanton BART Station	43	157
17 May 2017	Pleasanton Library	23	72
28 May 2017	Amador Valley Park Bus Event	10	|Not known
	TOTAL	**403**	**1344**

2.3   Information packet households

1,100 of households were reached through delivering bags with essential information packed in them including a postcard asking recipients to fill out information to receive incentives and resources. Two recipients of the packs returned the mailer asking for additional resources. The 1,100 households received a 10R schedule, neighborhood map, bookmark and return mailer.

2.4   Resources and Incentives

LAVTA and Steer Davies Gleave provided the different resources and incentives which were available for residents. Travel Advisors only delivered requested items that supported a possible behavior change identified as a result of the conversation.

Table 3.4 shows the total number of each resource given out to participants over the course of the project.

Table 2.3: Resources requested by participating households

Resources taken	Door to door visits	Targeted Information Packets	Events	TOTAL
City of Pleasanton Trail Map	192	0	125	317
Neighborhood Map	191	1100	183	1474
Route 10R schedule	166	1100	199	1465
Wheels system map	134	1100	190	1424
Clipper card with $3.75 or $1.75 value	93	0	0	93
BART info	93	0	62	155
Pedometers	82	0	49	131
Fare/ Clipper information	55	0	143	198
Bike doctor	23	0	0	23
Personal journey plan	7	0	0	7

Nearly 1500 of each of the Route 10R schedule and Wheels system map were given to people within easy access of the bus corridor.

2.5   Access to BART

Residents were asked how they accessed the BART station and how often when we first spoke to them. 57 residents reported traveling to BART at least one day per week. Of those:

- 17 (30%) drove;
- 10 (18%) took the bus;
- 16 drove or got dropped off;
- 3 drove or got the bus;
- 3 rode their bikes;
- 2 walked; and
- 23 did not answer the question.

3   Project Results

3.1   Monitoring Approach

Behavior change surveys were completed with door to door participants through telephone, email and in person surveys. In total 42 of the 395 participants through door to door visits completed a follow up survey (11%).

The feedback survey reminded participants about the 10R service and asked the following questions:

- How many trips by bus did you take in the past 7 days?
- Are you aware that the 10R bus route, along Santa Rita Road to the BART station, runs every 15 minutes most of the day?
- How likely are you to use the 10R in the future?
- How helpful did you find your conversation with our Travel Advisor? (Score out of 5)
- How useful were the resources that you received? (Score out of 5)
- Did you reduce your driving as a result of the SmartTrips Pleasanton program?

3.2 Bus trips taken

The project saw a very large increase in the average number of bus trips residents reported taking in the prior week in the after survey compared to the number taken at first contact. The average number of bus trips increased from 0.29 trips per person in the week prior to contact being made with them, to 1.5 trips per person in the week prior to the follow up survey.

Given the size of the increase, this is statistically significant even with a relatively small sample as shown in Figure 3.1.

Figure 3.1: Confidence Intervals and Sample Size: change in trips
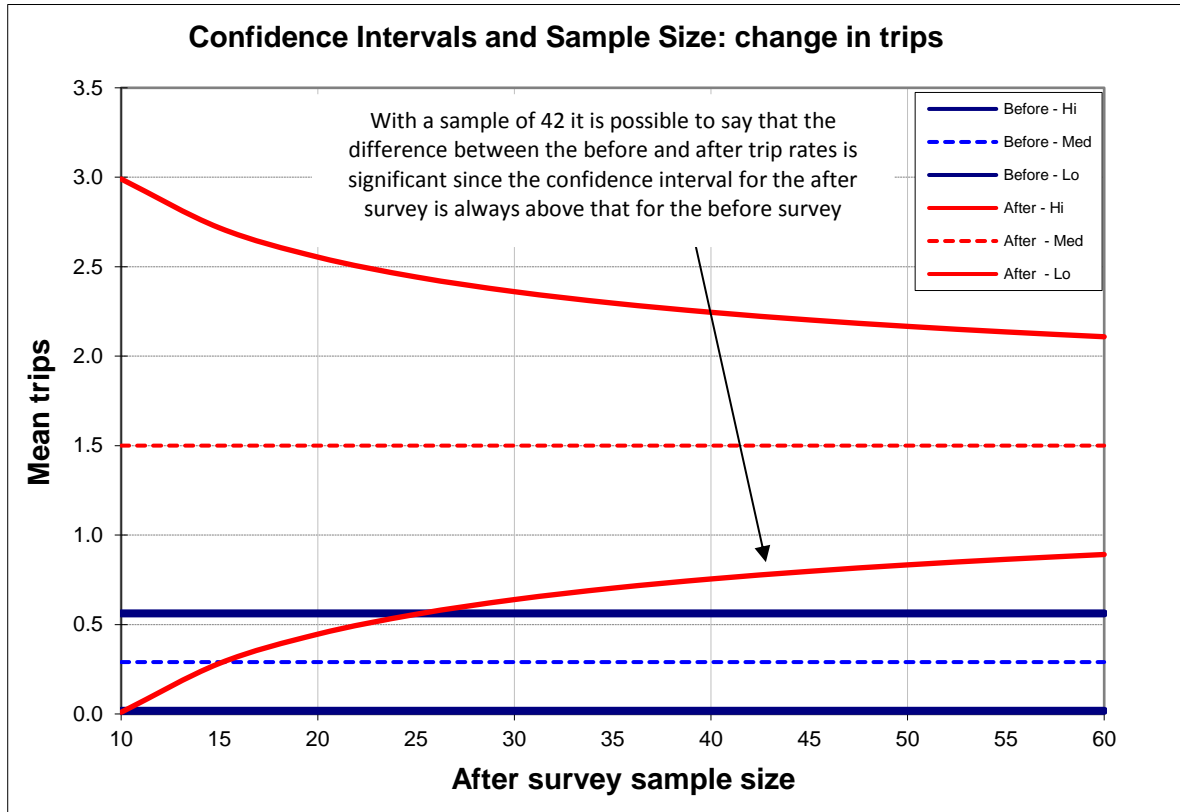
The 10R route saw a ridership boost post implementation of the program. Table 3.1 shows the change in September ridership over 3 years.

Table 3.1: Change in September Ridership 10R Bus

Month/Year	Boardings (w/out BART)	Increase from 2015 Ridership
Sep-15	9,906	
Sep-16	11,100	+12%
Sep-17	12,048	+19%

Figure 3.1 shows the change in 10R ridership over time with the red line marking the beginning of the SmartTrips Pleasanton Program in March 2017.

Figure 3.2: Change in 10R Ridership
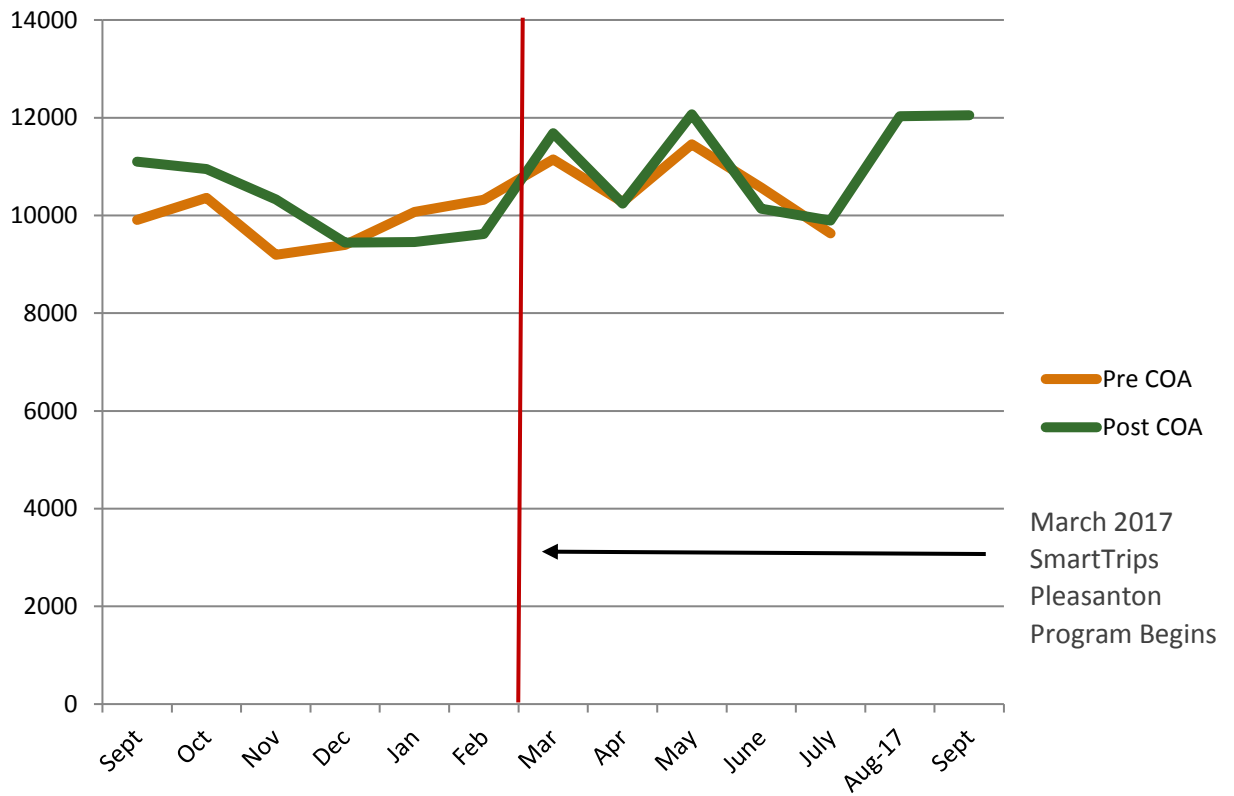
3.3   Familiarity with the 10R

Another positive outcome of the program was a significant increase in awareness of the 10R among the residents who live within the ¼ mile walkshed of the route. This improved recognition of the service is important to increasing the use of the service – even those who have not already tried the service immediately following contact by the program are more likely to do so in the future now that they are aware of the service that is offered.

Figure 3.3: Familiarity with the 10R service before and after

Familiarity with the 10R - first contact

Yes
33%

No
67%
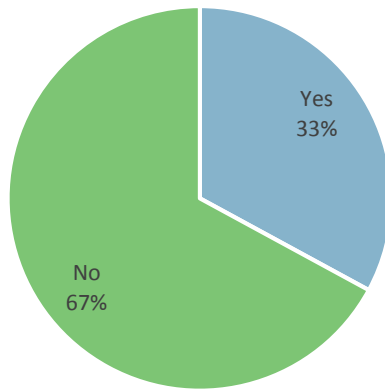
Familiarity with the 10R - follow up

No
10%

Yes
90%
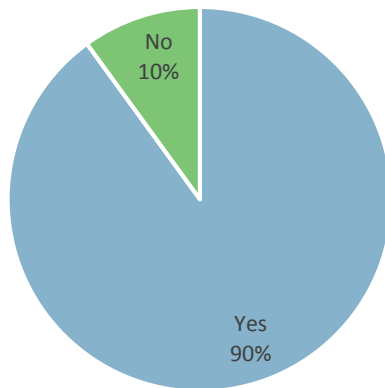
3.4 Likeliness to use service

In addition, 68% of follow up respondents indicated that they were either somewhat or very likely to use the 10R in the future.

Figure 3.4: Likeliness to use 10R in the Future
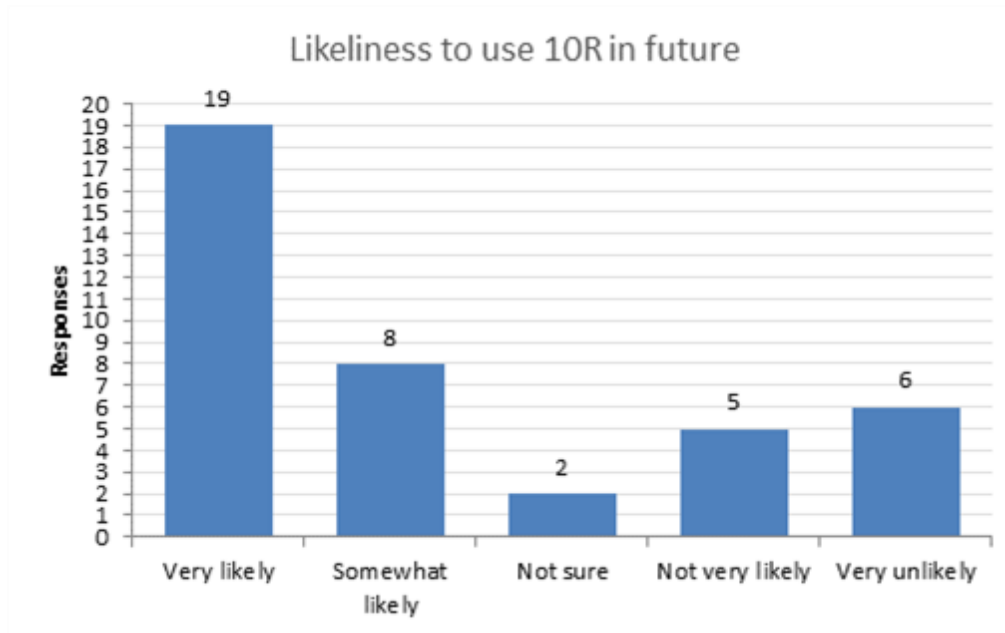
3.5 Conversation quality

92% of follow up respondents found the conversation with the Travel Advisor to be somewhat or very helpful. Those that did not either reported already riding the bus and not needing the information, or not wanting to use the bus.

Figure 3.5: Helpfulness to the Conversation
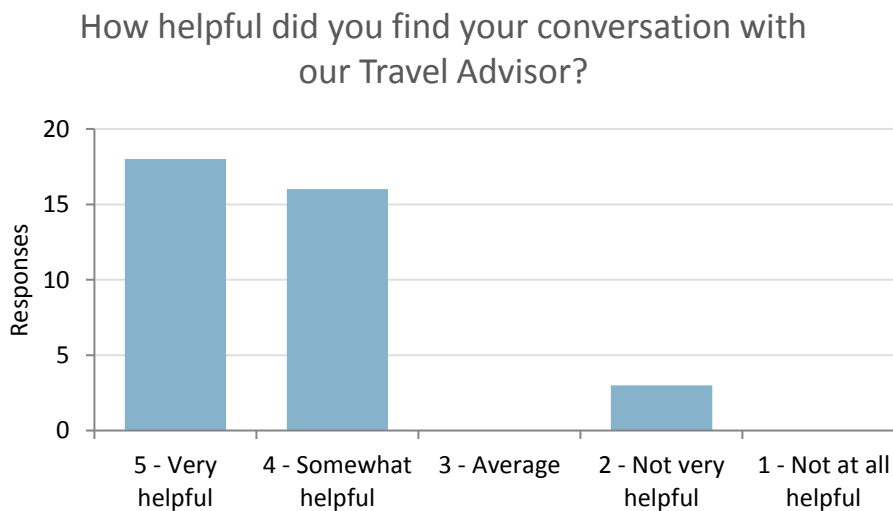
3.6   Resource quality

86% of follow up respondents found the resources they received to be somewhat or very useful.

Figure 3.6: Usefulness of Resources

How useful were the resources that you received?
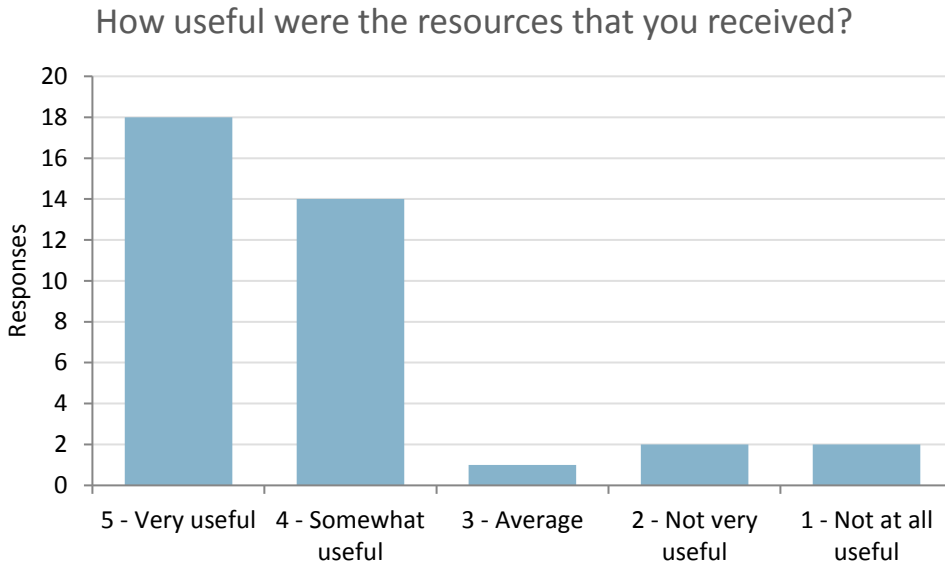
3.7   Reduction in driving

19% of follow up respondents reduced their driving as a result of the SmartTrips Pleasanton program.

Figure 3.7: Reduction in Driving

Did you reduce your driving as a result of the SmartTrips Pleasanton program?
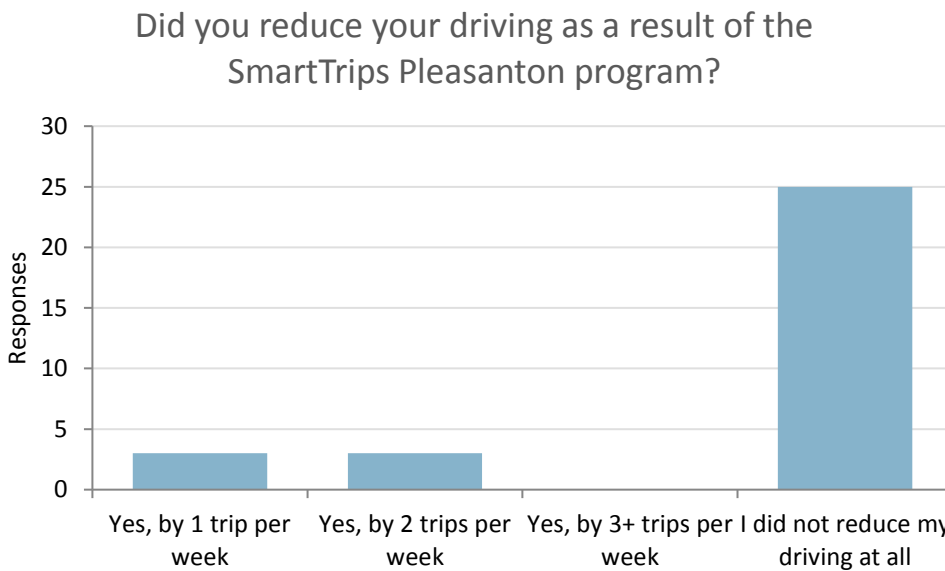
4   Lessons Learned

Overall, the project achieved some positive outcomes including:

- A reported increase in bus trips by residential participants in the follow up survey (from an average of 0.29 trips to 1.5 trips per previous 7 days).
- Improved community awareness about the 10R bus.
- Distribution of informational resources to over 1,800 households to help reduce barriers to taking transit for participants in the future.
- Positive feedback on the quality of their conversation with the TA and resources received from those who did participate in the program.
- A better understanding of local attitudes towards transit and some of the barriers to transit use in the local area.

Significant challenges faced by the SmartTrips team in implementing the program included:

- Difficulty recruiting team members led to an understaffed team resulting in slower progress and an extended outreach period.
- Lower participation rates than we have achieved in any other community – many residents were at home but refused to speak to the travel advisor.
- Negative attitudes towards public transportation.
- Spread out housing patterns slowed down progress rate.
- Very high sample loss/ inaccessible homes given the number of inaccessible apartment complexes in the target area.

The challenges and success of this program should be understood and used to improve outreach techniques and efficiency for future community outreach and marketing. Resistance to transportation behavior change can mean that mode shift can be more gradual and hard won in some communities than others. Some of the following actions should be taken to improve participation in any future similar programs:

- More vigorous community outreach ahead of residence visit to ensure more people understand the purpose of the project and are familiar with it before a Travel Advisor is at their door step. The team found that many residents were at least initially hesitant to speak with an advisor because their neighborhoods were regularly visited by solicitors. This may have been a huge barrier to asking residents to speak with a team member. If residents were to understand that the program was not selling anything and instead providing free resources and information ahead of their visit, more may have been willing to speak with a team member. More vigorous outreach through social media, partners, community groups, churches, ads in local news sources or engagement through NextDoor could be used in the future.
- Gamification could be used to incentivize folks to try the 10R for the first time, or increase the frequency they ride it across a wider area.
- The trails resource was the most requested item and promoting active recreation was a successful way to draw in participants. Adding additional recreation focused materials could improve participation, and in time willingness to ride the bus as people become less car dependent.
- Connecting with current 10R users and finding out more about what encouraged them to try the service the first time could also help improve the way the team approaches residents; using satisfied rider's stories through social media channels to make the service more appealing to non-users would also be effective.
- Our separate memo on recommendations for a Digital Campaign Strategy provided more specific ideas on digital channels.

In addition, the team achieved real success at events, in particular at the BART station where information was welcomed. This should remain a key part of future outreach and marketing strategies. The Amador Valley High School would also welcome an event but this could not be arranged in the project timescales.

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Appendices

A   Household Conversation Form

Participant Conversation Form

TA Initials:_____ Date:_____ 2017   Time (hh:mm) : ____:___   Visit Number: 1/ 2/ 3

	Key topics	
	Bus	☐
	BART	☐
	ACE	☐
	Walk	☐
	Bike	☐
	Car	☐

RESOURCES

Public Transit		Walking and Biking	
Route 10R schedule		Pedometers	
Wheels system map		Bike doctor	
Clipper card with $3.75 or $1.75 value		City of Pleasanton Trail Map	
Fare/ Clipper information		Bike Easy Bay fliers	
Personal journey plan (PTO)		All modes/ Other	
BART info		Neighborhood Map	

PRE VISIT: USE OF DIFFERENT TYPES OF TRANSPORT

	7 days a week	5+ days a week	3-4 days a week	1-2 days a week	Monthly	Less than monthly	Never
Drive alone							
Carpool							
Vanpool							
Bus							
BART							
How do you access BART?							
ACE							
Bike							
Walk							
Other (please state)							

How many trips did you take by bus in the last 7 days?		Were you aware the 10R bus route, along Santa Rita Road to the BART station, runs every 15 minutes most of the day?	Y/N

PARTICIPANT INFORMATION

First Name	Last name	Gender M / F	Approx Age	No. of persons in HH	No. of persons spoken to
Address	ZIP code	No. of cars in HH	No. of roadworthy bikes		Case Study? (P.T.O)

FOLLOW UP CONTACT

Send project newsletters by email/ other relevant travel information?   ☐ Yes   ☐ No

Participate in follow up survey?   ☐ Yes - Phone   ☐ Yes - Online   ☐ No

Telephone	Email	Best time to call (circle)			
		AM	PM	Early Eve	Any

Participant Conversation Form

TA Initials:_____ Date:_____ 2017   Time (hh:mm) : ____:___   Visit Number: 1/ 2/ 3

Personal Trip Plans

__Trip 1__ Method *Bus..*☐ *Train..*☐ *Any..*☐

Start_____   ZIP code:_____   Arrival Time (at destination):_____
                                                                OR
End:_____   ZIP code:_____   Departure Time (from home):_____

__Trip 2__ Method *Bus..*☐ *Train..*☐ *Any..*☐

Start_____   ZIP code:_____   Arrival Time (at destination):_____
                                                                OR
End:_____   ZIP code:_____   Departure Time (from home):_____

CASE STUDY
What change is this person going to make?   What makes them a good case study?

	What method are they going to try?
	Walking ………………..☐
	Biking …………………☐
	Bus………………..……..☐
	Train…………………....☐
	Carpooling/Vanpooling..☐
	Teleworking..…………..☐
	Other…………………..☐

Other notes about the conversation

OFFICE USE ONLY

FULFILLMENT DATE (mm/dd/yyyy):   _____/_____ /2017   INITIALS_____

DATE OF DATA ENTRY (mm/dd/yyyy):   _____/_____/2017   INITIALS_____

AFTER SURVEY CALL DATE (mm/dd/yyyy):   _____/_____/2017   INITIALS_____

B   Digital Campaign Strategy

To	LAVTA
Cc	Sarah McMinimy, Lisa Buchanan
From	Katie Wilson
Date	13 June 2017
Project	LAVTA Wheels Bus Route 10R Ridership Encouragement

Digital Campaign Strategy

Due to the older population of the target area, we recommend prioritizing local news outlets for digital advertising opportunities. We also recommend exploring available social media options to increase visibility of the campaign.

Advertisements

3-5 online banner/email banner ads or featured stories placed in local organizations and publications websites, geotagged to the target area.

- Online ads heavily branded for Wheels buses

    - Featured stories: write up about local community members utilizing Wheels and having a positive experience. Including personal stories and quotes as available.
    - Explore social media options with all outlets to help further spread ridership campaign.

- Possible local outlets to explore pricing options and readership data:

    - Bay Area News Group (East Bay Times): **http://www.bayareanewsgroup.com/our-products/east-bay-times/**
    - Pleasanton Weekly: **https://www.pleasantonweekly.com/**
    - Pleasanton Chamber of Commerce: **http://www.pleasanton.org/**
    - Pleasanton Website: **http://www.pleasanton.com/**
    - Downtown Pleasanton Association: **http://www.pleasantondowntown.net/**

Next Door

Connect with local advocate/user for the bus line that can post a personalized post on the neighborhood Next Door, talking about the convenient service and how it has helped her local trips. Highlight frequency, convenience and amenities on the bus.

Social Media

Utilize Wheels Twitter and Facebook to promote the route. Explore options with the Chamber of Commerce Facebook (**https://www.facebook.com/pleasantonchamber**) and Twitter (**https://twitter.com/pleasantonchamb**), and the Pleasanton Downtown Association Facebook (**https://www.facebook.com/PleasantonDowntownAssociation**) and Twitter (**https://twitter.com/pleasantondt**), and City of Pleasanton Facebook (**https://www.facebook.com/CityofPleasanton**) and Twitter (**https://twitter.com/pleasantonca**).

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Twitter

- Tweet one times a week (and actively retweeting others) – target 2:00 pm
- Utilize a campaign hashtag #wheels10R or #wheelsbus10R or something similar
- Utilize local images of people taking the 10R bus, connecting to BART stations or Downtown Pleasanton
- Actively retweet others who have used the hashtag
- Reach out to local organizations or figures to use their Twitter to help spread the message about the bus route. Actively retweet their posts if possible.

  - Chamber of Commerce
  - Pleasanton Downtown Association
  - City of Pleasanton
  - Local influencers

- Utilize tweets to push message and drive people to website, ex:

  - Avoid the hassle of finding a parking spot in Downtown Pleasanton. Take Wheels 10R to enjoy a night on the town. Learn more at **http://www.wheelsbus.com/route/route-10r/**.
  - Do your part to help the environment by utilizing transit. Wheels 10R is your green connection to Downtown Pleasanton and the rest of the Bay Area. Learn more at **http://www.wheelsbus.com/route/route-10r/**.

- Do fun, engaging tweets, ex:

  - Take Wheels 10R to connect to BART? Share your photo #wheels10R

    - #wheels10R photo of the day from @username who uses the route to connect to BART (with photo)

  - Share why you love Wheels Route 10R @wheelsbus using #wheels10R & you could win a $10 voucher (or similar prize)

    - Thanks @username for sharing that Route 10R lets you have time to message with your family in Europe.
    - Private message @username to give her $10 voucher (or similar prize)

Facebook

- Post one time a week – target 3:00 pm if possible
- Utilize high-quality local images of people taking Route 10R, connecting to local destinations or relaxing on the bus. Make it personal and relatable.
- Can share personal stories. Use images of people utilizing the bus and share their story in a quick, fun way. Ex:

  - Your neighbor Sharon saves $XX a month taking Wheels 10R to work and she gets to read her favorite novel. Learn how you can be more like Sharon at **http://www.wheelsbus.com/route/route-10r/**.
  - Gus uses Wheels 10R to avoid the headache of reserving a BART parking spot. A quick bus ride and he has the whole Bay Area at his fingertips. Learn more at **http://www.wheelsbus.com/route/route-10r/**.

Facebook target ads – second priority to paid news advertising opportunities, depending on costs

- Utilize geo-targeted Facebook ads with call-to-action to go to website **http://www.wheelsbus.com/route/route-10r/**
- Utilize high-quality local images of taking the bus downtown or to BART. Make it personal and relatable.
- Can share personal stories. Use images of people utilizing the bus line and share their story in a quick, fun way. Ex:

  - Your neighbor Sharon saves $XX a month taking Wheels 10R to work and she gets to read her favorite novel. Learn how you can be more like Sharon at **http://www.wheelsbus.com/route/route-10r/**.
  - Gus uses Wheels 10R to avoid the headache of reserving a BART parking spot. A quick bus ride and he has the whole Bay Area at his fingertips. Learn more at **http://www.wheelsbus.com/route/route-10r/**.

- Or can use more generic text with inspiring images. Ex:

  - Catch up on your emails on the way to the office. Wheels buses have free WiFi so you can stay connected on your journey. Learn more at **http://www.wheelsbus.com/route/route-10r/**.
  - Avoid the hassle of finding a parking spot in Downtown Pleasanton. Take Wheels 10R to enjoy a night on the town. Learn more at **http://www.wheelsbus.com/route/route-10r/**.
  - Do your part to help the environment by utilizing transit. Wheels 10R is your green connection to Downtown Pleasanton and the rest of the Bay Area. Learn more at **http://www.wheelsbus.com/route/route-10r/**.

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