

**S T A F F   R E P O R T**

SUBJECT: Year Two Individualized Marketing Program Summary

FROM: Tony McCaulay, Director of Planning and Marketing

DATE: March 25, 2019

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**Action Requested**

None – Information Only

**Background**

In October 2016, the Board authorized the award of a contract to Steer Davies Gleave (since renamed Steer) to conduct a two phase Individualized Marketing Program. The first year of the program in 2017 focused on the Santa Rita/Owens Drive Route 10R corridor in Pleasanton. Year two of the program in 2018 targeted communities within walking distance of the Route 30R in Dublin and Livermore.

Individualized marketing for public transit entails personal contact by trained travel ambassadors with individuals who live near quality transportation services within a corridor. The person-centered approach allows individuals to discuss their travel habits in a relaxed setting and consider viable alternatives for their own personal situation, with tailored resources and information. Similar programs in other areas have shown that individualized marketing has the potential to generate more riders who continue to choose transit options for a longer duration than more traditional marketing outreach efforts.

**Discussion**

To help reinforce the individualized messaging being carried out by the program’s Travel Advisors, LAVTA Marketing staff carried out a simultaneous coordinated marketing effort focused on the same corridor. Our efforts included a targeted direct mail piece, geo-fenced digital media along the corridor and sponsorship of radio station KKIQ’s traffic reports with a focused message about the convenience of Rapid bus service. The campaign used a consistent tag line of “A Better Way to BART” for all of the outreach efforts.

Attached to this Staff Report is an Executive Summary prepared by our consultant. One key point in the summary is the fact that during the first six months following the outreach effort, boardings in the target area increased by 11 percent over the previous year. This was despite the fact that one of the key bus stops in the zone was closed for that entire period due to construction at the new Kaiser facility.

Staff feels that the results that were achieved through the year two coordinated outreach effort warrant continuation of the effort, perhaps with a slightly reduced and revised scope based on lessons learned over the first two years. Among the adjustments recommended by LAVTA staff and the consultant:

- Focus outreach on new developments and new residents while forming relationships with property managers and HOA's well in advance of the outreach efforts
- Focus on higher density housing developments, where participation rates by residents were much higher than in established single family housing neighborhoods
- Expand the number of outreach events at the East Dublin/Pleasanton BART Station
- Expand the program to employers along the Rapid routes who may have employees traveling from BART to their workplace

Staff will develop a Request for Proposals to continue the program for another two years and will bring a recommendation back to the Board this summer.

### **Fiscal Impact**

Funds for this project, including the initial year and the option year of the contract and requested contingencies, were provided through a Transit Performance Initiative (TPI) grant that was awarded to LAVTA by MTC in May 2016. The contract amount for year two component of the project was approximately \$130,000.

### **Recommendation**

None – Information Only

Attachment:

1. SmartTrips Tri-Valley Final Report Executive Summary

Attachment 1

SmartTrips Tri-Valley Phase 2 Final Report

Executive Summary

# Executive Summary

SmartTrips Tri-Valley provided personalized transportation outreach to households and community near the Wheels 30R route. A team of trained Travel Advisors had conversations with residents and delivered to their door personalized information and support to help them try new ways of getting around.

## **Program Approach**

SmartTrips Tri-Valley Phase 2 took a thoughtful and intentional approach to meeting residents in their neighborhoods and encouraging their awareness and enthusiasm for the high-quality transit services that run right through the heart of their communities.

It used an outreach approach based on a face-to-face conversation between a trained Travel Advisor and an individual resident. This technique, Personal Travel Planning (PTP), involves listening to the individual's needs, wants, and constraints and guides them towards a solution involving more active and environmentally friendly transportation choices. 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

A team of local outreach staff were hired for the on-the-ground implementation of door-to door PTP conversations. Travel Advisors were trained over a three-day period on PTP and the local transportation options.

Households within a 5-10 min walking distance from 30R stops were divided into zones and targeted for outreach. In Dublin, Travel Advisors focused on the residential units between Dublin Rd and Central Pkwy, and in Livermore two developments near the Las Positas College stop as well as the new Sage development.

There were twelve different transportation resources made available for the Travel Advisor team to promote to residents on the doorstep. Travel Advisors filled Smart Trips bags with the residents' requested resources and distributed the bags to household doorsteps.

## **Outreach**

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 separate occasions at different times of the day and during the weekend.

Those who were found at home and agreed to speak with the team member were engaged in a short conversation, at the end of which the resident had the opportunity to request personalized transportation material to help them try different ways of getting around their neighborhood.

The SmartTrips team also did outreach to residents at the Dublin Farmer’s Market and at the Dublin/Pleasanton BART Station. The team was also able to schedule one on-site event with a residential community.

### Engagement Outcomes

Over 20% of households who received a door knock chose to participate in SmartTrips Tri-Valley, by holding a conversation with a travel advisor and requesting resources. An additional 1,409 people came into contact with the program through events held at BART, the Farmers’ Market and one residential building event.

Participation varied by neighborhood, with some as high as 36% in Wexford at Irongate (Zone P) in Dublin and as low as 7% in Vineyard Terrance (Zone R) in Livermore. Dublin neighborhoods had an overall higher rate with 23% of contacted households participating as opposed to 15% in Livermore.



### Project Results

To measure the impact that the SmartTrips Program had on bus ridership and broader travel behavior in the neighborhoods targeted for outreach, a post-program survey was administered to participants 3-4 months after the initial conversation with the Travel Advisor.

The survey demonstrated that program was very effective at encouraging residents to ride the 30R service. Key results include:

- 48% of SmartTrips participants tried the 30R Rapid Bus after speaking with a Travel Advisor;
- **Average bus trips among participants increased from 0.5 trips to 1.7 trips per week;**
- 70% of follow-up respondents indicated that they were somewhat or very likely to use the 30R in the future.
- Nearly 30% of post program participants increased the number of trips by bus they had taken in the past week. Those who did increase their bus usage took on average an additional 4 bus trips per week.
- **Boardings increased by 11% in the SmartTrips outreach zone from May-October 2017 to May-October 2018.**

# SmartTrips Tri-Valley

Our program aimed to increase ridership on the 30R Rapid Bus in Dublin and Livermore.



## KEY STATS

 **2,687**  
Doors knocked

The team visited each door up to three times

**1,168**  
 Conversations

Travel Advisors spoke with residents about their travel options

**545**  Participants

20% of the doors knocked participated, receiving resources and information

## KEY STATS BY CITY

### Dublin

 **1,765**  
Doors knocked

**411**  
(23%)  Participants

### Livermore

 **922**  
Doors knocked

**134**  
(14%)  Participants

## RESOURCES DISTRIBUTED

We distributed...

 **404** 30R Rapid Schedules

 **348** Neighborhood Maps

 **336** Clipper Cards

 **334** Wheels System Maps

An additional 1,327 30R Rapid Schedules & Neighborhood maps were distributed at East Dublin/Pleasanton BART Station.

## OUTCOMES

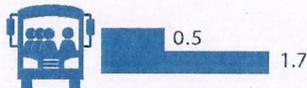
 **48%** of participants tried the 30R Rapid Bus after speaking with the SmartTrips team

**75%**  found the resources helpful

**90%**  found the conversation helpful

**70%** of follow-up respondents indicated that they were somewhat or very likely to use the 30R in the future

Among participants, average bus trips increased from 0.5 to 1.7 trips per week



**29%** of respondents increased their weekly bus trips after speaking with a Travel Advisor

## WHAT WE HEARD

"I started using the bus because of my conversation with the SmartTrips team member. I really like the bus."

"My son started to take the bus every day to school after I spoke with the Travel Advisor. I drive less now because of it."