

Appendix S: Transit Competitiveness

To: San Diego Association of Governments and Caltrans District 11
From: North County Comprehensive Multimodal Corridor Plan Project Team
Date: October 2022
Subject: North County Comprehensive Multimodal Corridor Plan – Transit Competitiveness

Overview

The North County Comprehensive Multimodal Corridor Plan (CMCP) will identify integrated transportation solutions that enhance the way people travel throughout North County.

This appendix provides the demand analysis and market research approach for the North County CMCP to research where, when, and how people travel in the North County region, how competitive transit is compared to other travel modes, and opportunities for transit.

Memorandum

TO: Edgar Torres, Precious Nicanor
FROM: Cambridge Systematics
DATE: March 18, 2022
RE: North County CMCP Market Analysis Approach

The North County CMCP efforts include a comprehensive evaluation of existing market demands to understand where, when, and how people travel in the North County region, understand how competitive transit is compared to other travel modes, and identify opportunities for transit. This memo documents the demand analysis and market research approach for the North County CMCP work.

The market analysis used a combination of the following steps:

- Used location-based services data product for all of 2018 to help explain total travel markets. The LOCUS origin-destination flow data was segmented across a number of key dimensions including time-of-day, day-of-week, travel purpose, and visitor vs. residents. The data was utilized to understand regional travel and identify markets at the granular spatial level for potential ridership growth;
- Travel time competitiveness measurement that compares transit and auto travel times was used to evaluate transit service and identify markets where service enhancement can enhance rider benefits. Each trip was routed through the Open Trip Planner (OTP) engine to obtain transit travel times, and through Google API to generate auto travel times.
- On-board rider survey data was used to highlight how current riders use transit services and compared to total travel to understand transit share for different markets.
- Overall travel demand and transit competitiveness measures were then stitched together to evaluate and identify potentially transit-rich markets for investment to boost/retain service, such as high-intensity travel corridors, local and regional activity centers, and commuting-oriented markets. This information can also be utilized to evaluate markets with low overall demand where current service can be reimaged using more creative and appropriate investment options.