



Hampton Roads Transit: Light Rail

Marketing Research Study

February 25, 2011

Prepared by:
Southeastern Institute of Research, Inc.



Some Area Residents Express these Views of The Tide:

I think that this is really exciting for this area, and it is much needed. The other cities should jump on board and help expand this much needed mode of transportation. I would utilize this service because it is a cost effective and more efficient way for me to travel.

I would be likely to ride the light rail if I find the light rail to be faster than the daily commute and reliable and safe to be a passenger.

Why would I drive to a commuter station and park my car in a parking lot where it could get vandalized when I can drive in just as quickly and protect my vehicle? There is no easy way for me to get to a station.

I live in Virginia Beach. This is the train to nowhere.

Objectives

Study Objectives

- Hampton Roads Transit is preparing to launch light rail service (The Tide) in Hampton Roads.
- Assessing and understanding potential market response to the new light rail service is important to a successful launch. Crucial to this initiative is the identification of likely riders of the new light rail service and identifying and understanding the perceived benefits and obstacles of light rail to potential riders.
- This research is designed to identify and understand the perceptions and potential reaction to The Tide among area residents.

Methodology

Methodology

- To meet the objectives for this study, two research surveys were conducted:
 - Telephone survey: A random sample of residents who live within the targeted area
 - Online survey: Possible respondents were intercepted in downtown Norfolk and invited to complete an online survey
- Supplemental sample of downtown business leaders
 - Downtown Norfolk Council
- The three surveys asked the same questions

Methodology

Telephone survey:

- RDD (random digit dialing) was used to reach potential respondents in the telephone survey
- Respondents had to be at least 18 years of age
- They had to travel at least occasionally to the targeted area (a description of the area was read to them)
- Interviews averaged 18.5 minutes
- 400 interviews were completed
- Interviews conducted Nov. 9-22, 2010

The questionnaires used for the telephone and online surveys consisted of the same questions. Due to inherent differences in the methodologies, the sequence of questions for the two questionnaires differed slightly. For example, a map of the area could be shown to online respondents but not to telephone respondents.

Methodology

Online survey (downtown intercept):

- For the online survey, respondents were intercepted in downtown Norfolk at the following locations:
 - MacArthur Center
 - Tidewater Community College
 - Norfolk State University
 - Chrysler Hall
 - Norfolk Scope
 - City Hall/Courts Complex
 - EVMS/Sentara Norfolk General Hospital
- Potential respondents were given postcard invitations to complete an online survey
- Data collected December 4-20, 2010

Methodology

Supplemental Online survey (Downtown Norfolk Council):

- Email invitations were sent to members
- Emails included a link that took respondents directly to the survey
- Data collected January 25 – February 3, 2011

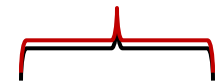
Final Distribution of Interviews

| Resident Survey (Telephone Survey) | | Intercepted Downtown (Online Survey) | |
|------------------------------------|---------------------|--------------------------------------|---------------------|
| n = 400 | | n = 437 | |
| Work downtown | Other trip downtown | Work/student downtown | Other trip downtown |
| n = 137 | n = 263 | n = 357 | n = 90 |
| | | | |
| | | | |
| | | | |
| | | Workers | Students |
| | | n = 176 | n = 181 |

- The data from the telephone survey and the online survey are not combined because they are different methodologies.
- In the presentation, respondents are always identified by the group into which they are classified (students are shown separately, as appropriate). Findings from the resident telephone survey are shown in blue. Findings from the downtown intercept are shown in green.

Final Distribution of Interviews

Supplemental
Online Sample



| Resident Survey (Telephone Survey) | | Intercepted Downtown (Online Survey) | | Downtown Norfolk Council |
|---------------------------------------|------------------------|---|------------------------|--------------------------------|
| n = 400 | | n = 437 | | |
| Work downtown | Other trip downtown | Work/student downtown | Other trip downtown | |
| n = 137 | n = 263 | n = 357 | n = 90 | |
| | | | | |
| | | | | |
| | | Work- ers | Stu- dents | |
| | | n = 176 | n = 181 | |
| | | | | n = 244 |

Results shown
in brown



7

Key Insights for The Tide

#1

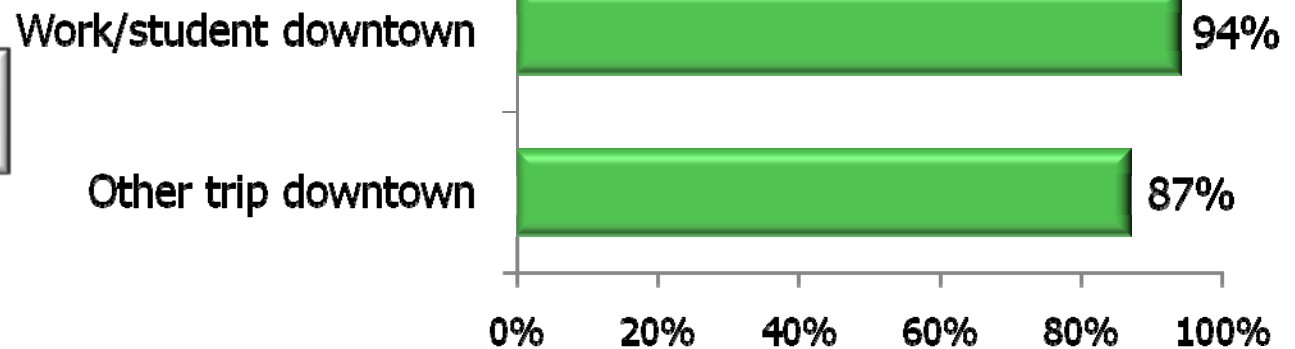
Although Awareness of The Tide
Is High, Familiarity and
Understanding Are Low

Awareness of The Tide Is High – 9 out of 10 (or more)
Are Aware of the New Light Rail; Interestingly, Those
Who Were Intercepted Downtown but Do Not Work
Downtown Post the Lowest Level of Awareness

Resident
survey



Intercepted
downtown

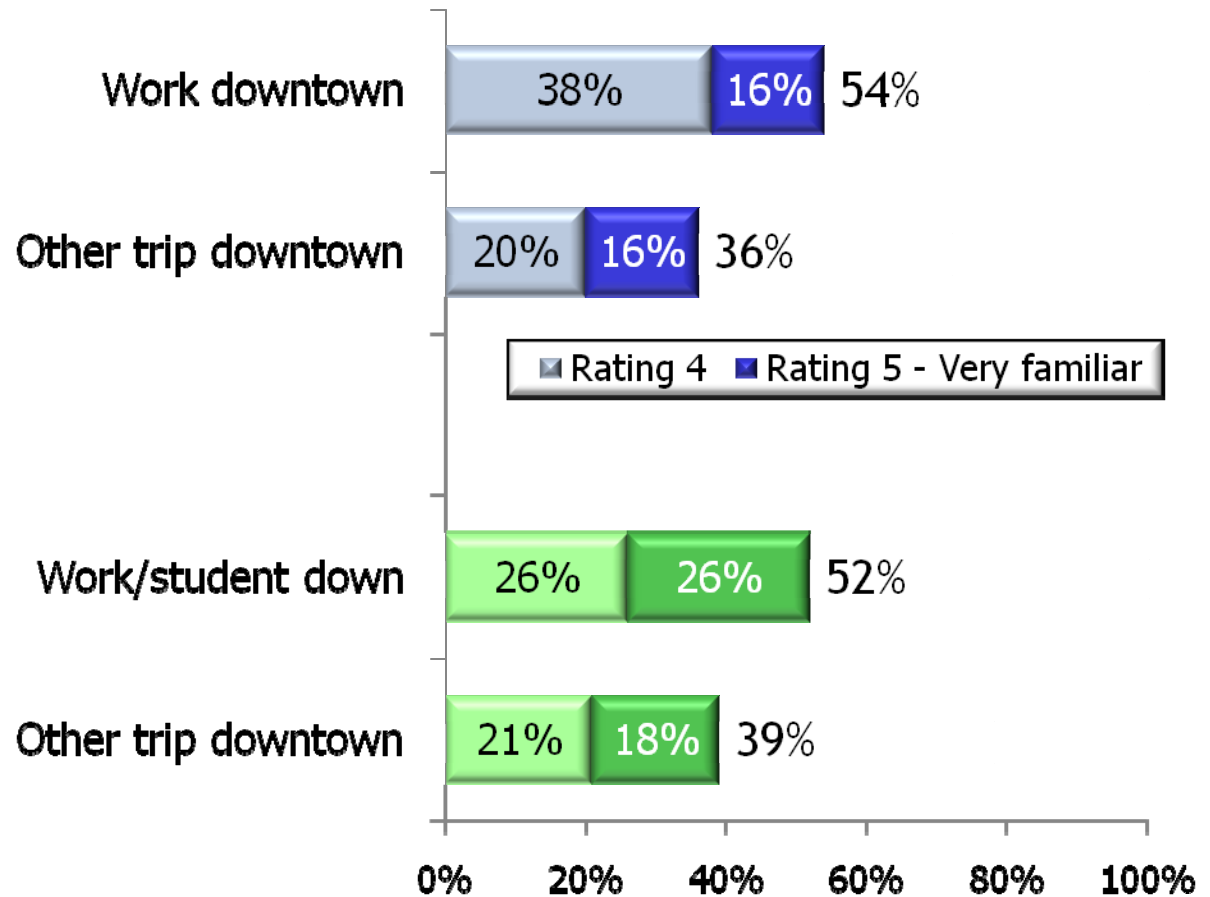


Q3/21. Prior to this survey, had you read or heard anything about The Tide Light Rail?

Familiar with
The Tide

Among those Aware of The Tide, those Who Work
Downtown Are More Likely to Say They Are Familiar with
The Tide; But, Still, about Half of the Downtown Workers Do
Not Say They Are Familiar with The Tide

Resident
survey



Intercepted
downtown

Question asked
of those who
were aware of
The Tide.

Q4/22. How familiar are you with The Tide Light Rail?



Awareness of
The Tide
station stops

Downtown Workers Are Also More Likely to Know Where The Tide Stops Are Located

Resident
Survey

Work downtown

66%

Other trip downtown

50%

Intercepted
downtown

Work/student downtown

73%

Other trip downtown

58%

0% 20% 40% 60% 80% 100%

Question asked
of those familiar
with The Tide.

Q5/21. Do you know where the new Tide station stops will be located?



Southeastern Institute of Research

Strategic Implication for The Tide:

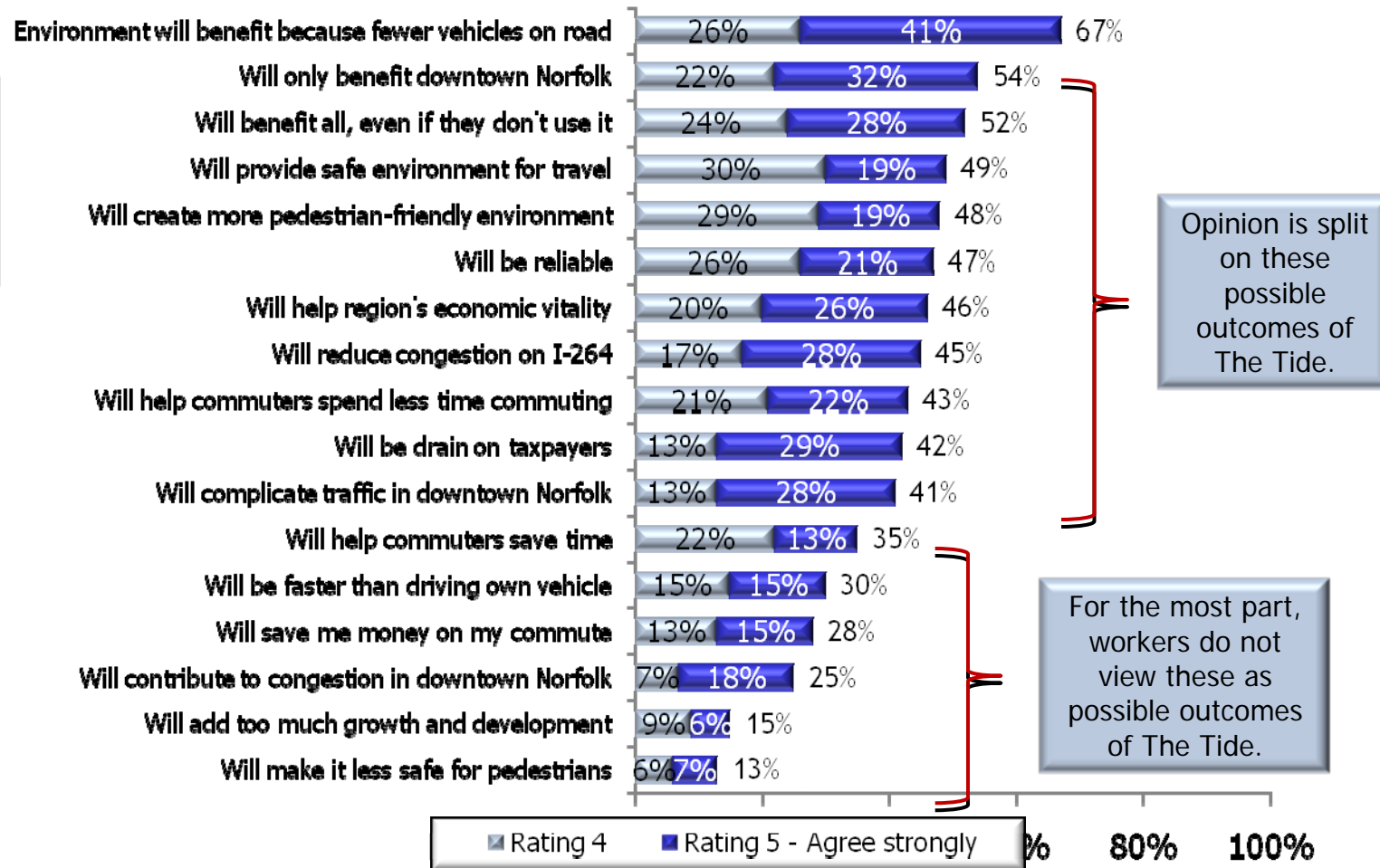
Familiarity with The Tide is necessary for trial. Awareness alone will not build support and use of the service. Area residents must understand both the benefits of The Tide and how it works (e.g., how to pay fare) in order to believe in it and use it. Successful communications for The Tide will need to include an educational component. HRT must manage the flow and content of messages about The Tide to grow understanding and support. At this point, communication is not about growing awareness.

#2

Residents Recognize Many Benefits of The Tide

Resident
survey:
Work
downtown

Most Often, Workers (Resident Survey) Believe that The Tide Will Benefit the Environment



Q23. Next, I'm going to read you a list of statements about The Tide light rail. Please tell me the extent to which you agree or disagree with each statement.

Likelihood of
riding The Tide
for work or
school commute

About One-fourth of Downtown Workers Say They Will Use The Tide for their Commute at Least Occasionally – Nearly a Third of Students Say They Will Use The Tide

Resident
survey

Work downtown



Rating 4 Rating 5 - Very likely

Intercepted
downtown

Work downtown



Student downtown



0% 20% 40% 60% 80% 100%

Q24/31. When The Tide Light Rail is completed and open for use, how likely will you be to use it at least occasionally for your regular commute to work or school?



Southeastern Institute of Research

Reasons would
use The Tide
for work/school
commute

Only responses
of 2% and
higher are
shown.

There Is No One Overwhelming Reason to Ride The Tide for Work/School Commute; Most Often those Who Will Ride Say It Is Convenient, Allows them to Avoid Traffic, and Saves Money

| | Resident Survey | Intercepted Downtown |
|---|-----------------|-----------------------|
| | Work downtown | Work/student downtown |
| Convenient | 26% | 16% |
| Avoid traffic | 14% | 11% |
| Save money | 11% | 19% |
| Less hassle/stress | 11% | 5% |
| Better for environment | 11% | 2% |
| Save time/faster | 9% | 16% |
| Save gas | 6% | 14% |
| Protect car from wear and tear | 6% | 3% |
| I support public transportation | 6% | 2% |
| It's easy | 3% | 6% |
| Not have to worry about parking | 3% | 5% |
| I support light rail | - | 4% |
| No car | - | 4% |
| Train is faster than bus | - | 3% |
| For the experience/I'm curious/ to "test" it | 7% | 9% |

Q26/34. Why are you likely to ride The Tide Light Rail?

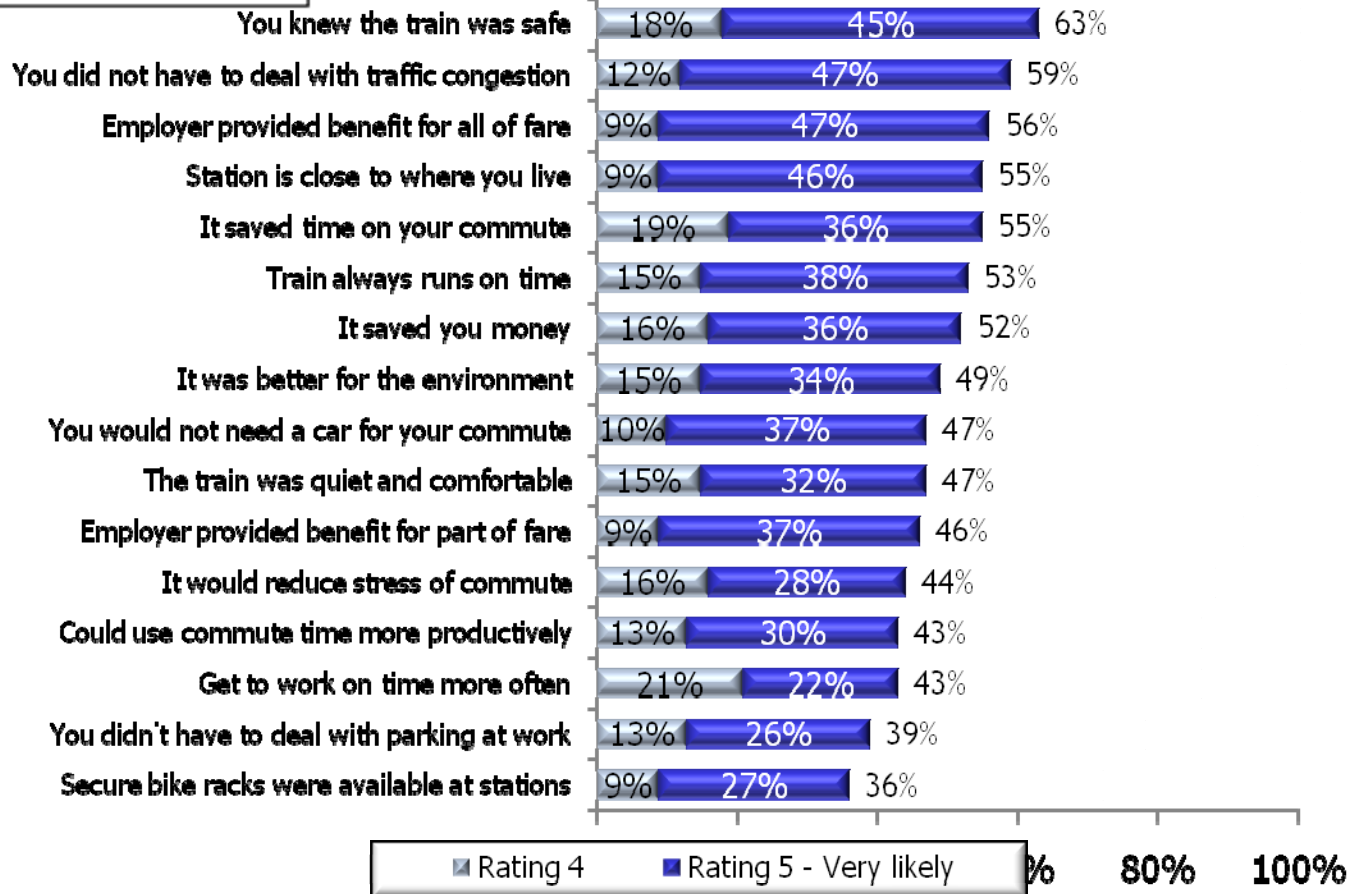


Impact of
perceived
benefits on
likelihood of
riding The Tide

Resident
survey:
Work
downtown

Workers Who Participated in the Resident Survey Were Most Likely to Say They Would Ride The Tide if They Knew It Was Safe, If They Did Not Have to Deal with Traffic, If their Employer Paid All the Fare, if Station Were Close to Home, and if It Saved Them Time on their Commute

Would ride The Tide if:



Q28. Using a scale of "1" to "5," how likely would you be to ride The Tide Light Rail if _____?



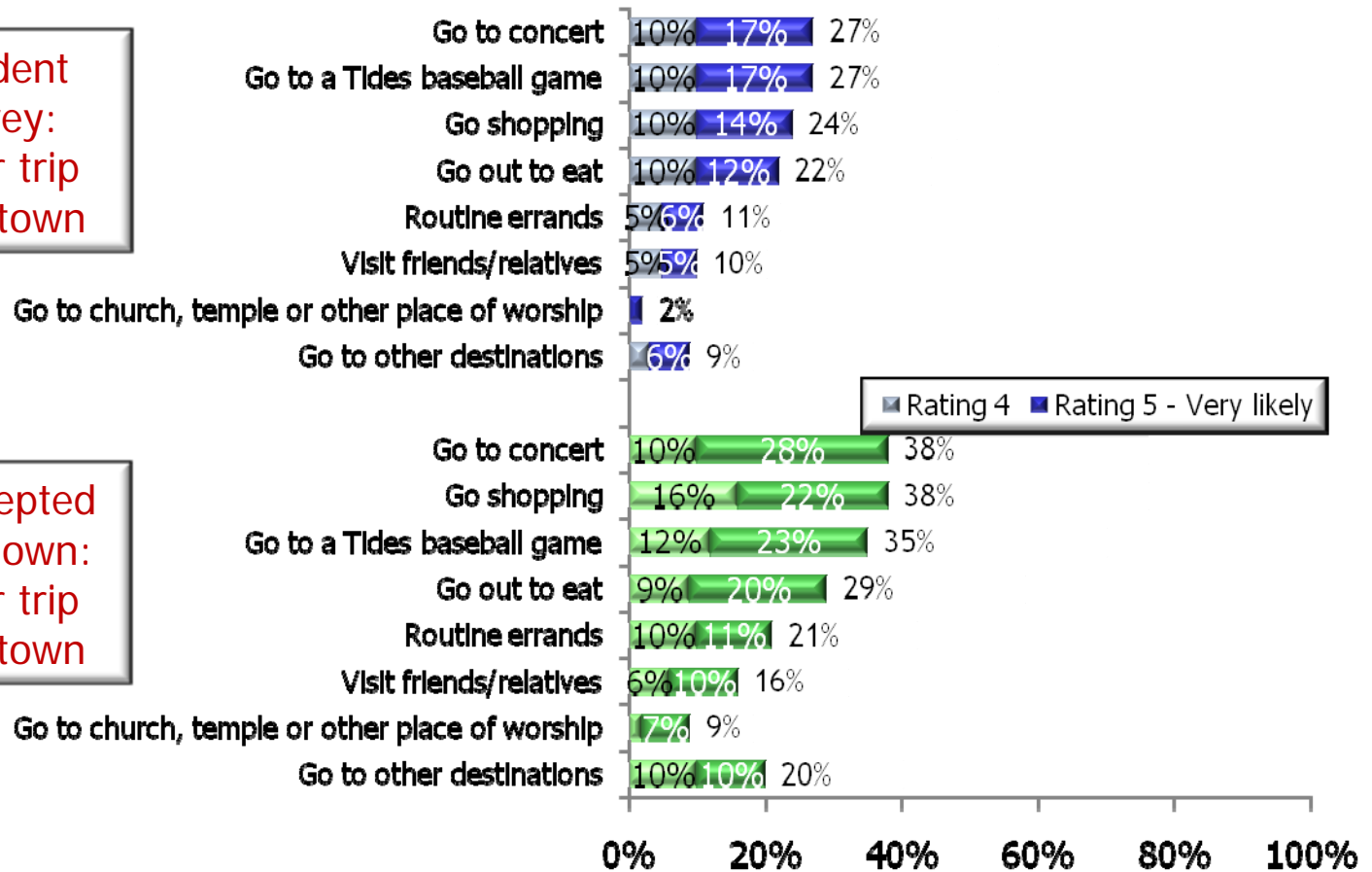
Southeastern Institute of Research

Likelihood of
using The Tide
for non-work
trips

A Fourth to a Third of Those Who Go Downtown for Trips Other Than Work Say They Would Use the Light Rail for Non-work Trips, Most Often for Concerts, Tides Baseball, Shopping and Going Out to Eat

Resident
survey:
Other trip
downtown

Intercepted
downtown:
Other trip
downtown



Q39/48. When The Tide Light Rail is completed and open for use, how likely will you be to use it at least occasionally for each of the following?



Reasons would use The Tide for trips other than work or school

Those Who Travel Downtown for Non-Work Trips and Would Likely Ride Light Rail Would Do So to Avoid the Hassle of Parking, to Avoid Traffic, and Because It Is Convenient; Some Would Ride the New Service Out of Curiosity and for Fun

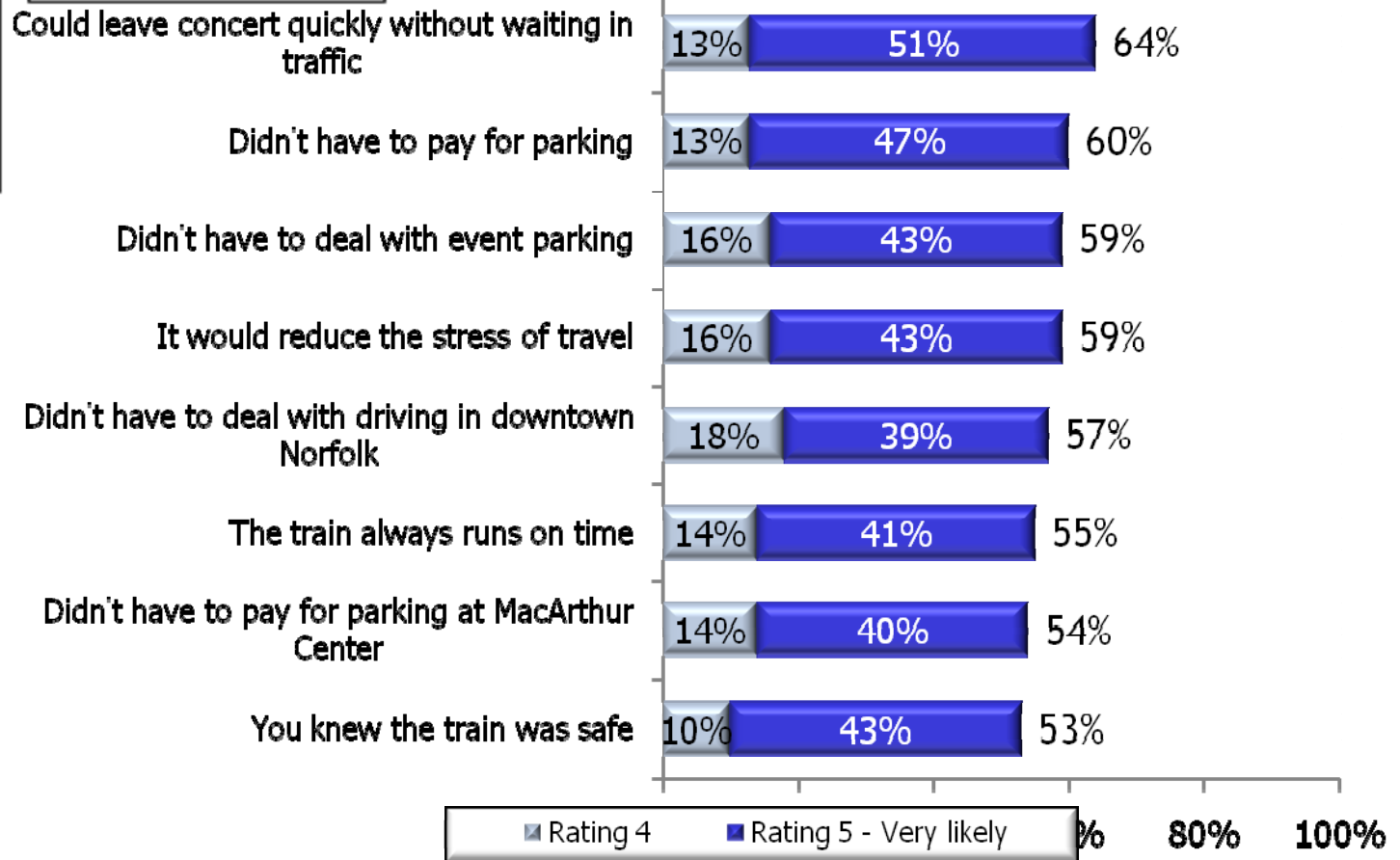
Only responses of 2% and higher are shown.

Q40/49. Why would you be likely to ride the light rail?

| | Resident Survey | Intercepted Downtown |
|--|---------------------|----------------------|
| | Other trip downtown | Other trip downtown |
| Avoid hassle of parking | 19% | 16% |
| Avoid traffic | 18% | 10% |
| Convenient | 15% | 22% |
| Support public transportation | 11% | 6% |
| Save gas | 10% | 4% |
| Support light rail | 9% | 2% |
| For the experience/I'm curious/test it/fun | 12% | 18% |
| It's easy | 7% | 2% |
| Better for environment/energy efficient | 6% | 2% |
| Save money | 5% | 4% |
| Don't like/want to drive | 5% | 6% |
| Save time/faster | 2% | 8% |
| Save wear and tear on car | 2% | 2% |
| Save money on parking | 2% | 8% |
| Like trains/better than bus | 2% | 2% |
| Support project | - | 4% |

For those Going to Downtown Norfolk for Reasons Other than Work, The Tide Is Appealing for Making It Easier to Get in and out of Downtown and Lessening the Stress of Parking and Traffic (con't. on next slide)

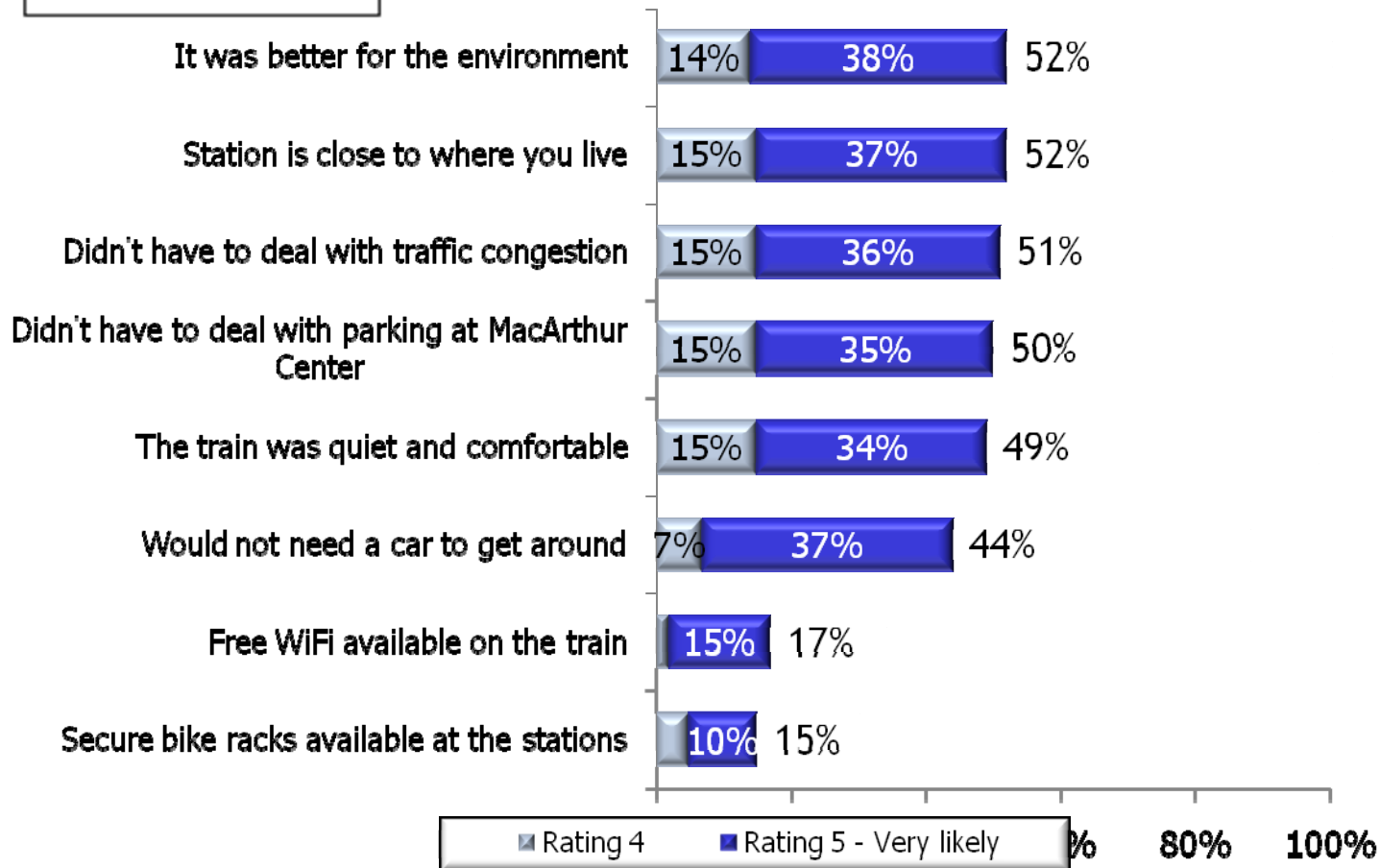
Would ride The Tide if:



Q43. Using a scale of "1" to "5," how likely would you be to ride The Tide Light Rail if _____?

While Impact on the Environment Is Important, Convenience and Relief from Traffic and Parking Are Equally Persuasive Reasons for Riding The Tide (con't. from previous slide)

Would ride The Tide if:



Q43. Using a scale of "1" to "5," how likely would you be to ride The Tide Light Rail if _____?

Strategic Implication for The Tide:

Residents are more likely to recognize community benefits than individual benefits of The Tide. But, perceived individual benefits will drive their decision to ride The Tide. Other transportation research conducted by SIR indicates that commuters do not typically make commute decisions based on concerns for the environment or benefits for the “greater good.” Commute decisions tend to be based on perceived individual benefits, such as saving time, saving money, getting to work on time, and dependability. To encourage trial of light rail, messages should emphasize how the **rider** benefits.

#3

There Are Several Perceived
Barriers that Limit the Appeal
of The Tide

Reasons would not use The Tide for work/school commute

Only responses of 2% and higher are shown.

Those Not Likely to Ride the Light Rail for Work/School Express Most Concern about the Limited Service Area

| | Resident Survey | Intercepted Downtown |
|--|-----------------|-----------------------|
| | Work downtown | Work/student downtown |
| Does not serve where I live | 26% | 9% |
| Serves limited area/not near my destination | 24% | 53% |
| Not convenient | 10% | 2% |
| Have own vehicle/easier to drive | 9% | 8% |
| Want flexibility | 8% | 8% |
| Criticism of the light rail project | 5% | 2% |
| Commute is too short | 3% | 7% |
| Don't like type of people on public transportation | 3% | - |
| I have no need | 3% | 1% |
| Safety concerns | 3% | 3% |
| Don't like crowds | 3% | - |
| Takes too long/delays | 2% | 12% |
| Location of stops | - | 2% |
| Does not help at tunnels | - | 3% |
| Cost | - | 2% |
| Don't use public transportation | 1% | 2% |
| Weather concerns | - | 2% |

Q25/32. Why are you not likely to ride The Tide for work or school?

The Limited Service Area, Preference for Driving, Not Convenient and the Perception of No Need to Ride Light Rail Are Preventing those Who Don't Work in Downtown Norfolk from Using Light Rail for Other Trips Downtown

Reasons would not use The Tide for trips other than work or school

Only responses of 2% and higher are shown.

| | Resident Survey | Intercepted Downtown |
|----------------------------------|-----------------|-----------------------|
| | Work downtown | Work/student downtown |
| Does not serve where I live | 29% | 30% |
| Prefer to drive my car | 24% | 10% |
| Not convenient | 14% | 10% |
| Safety | 10% | 10% |
| I have no need | 9% | 16% |
| Does not go where I need to go | 8% | 10% |
| It's faster with car | 5% | - |
| Critical of project | 4% | 5% |
| I need more information | 3% | - |
| Cost – fare | 2% | - |
| Want flexibility | 2% | - |
| Does not help at tunnels | - | 5% |
| Don't go to Norfolk often enough | - | 15% |

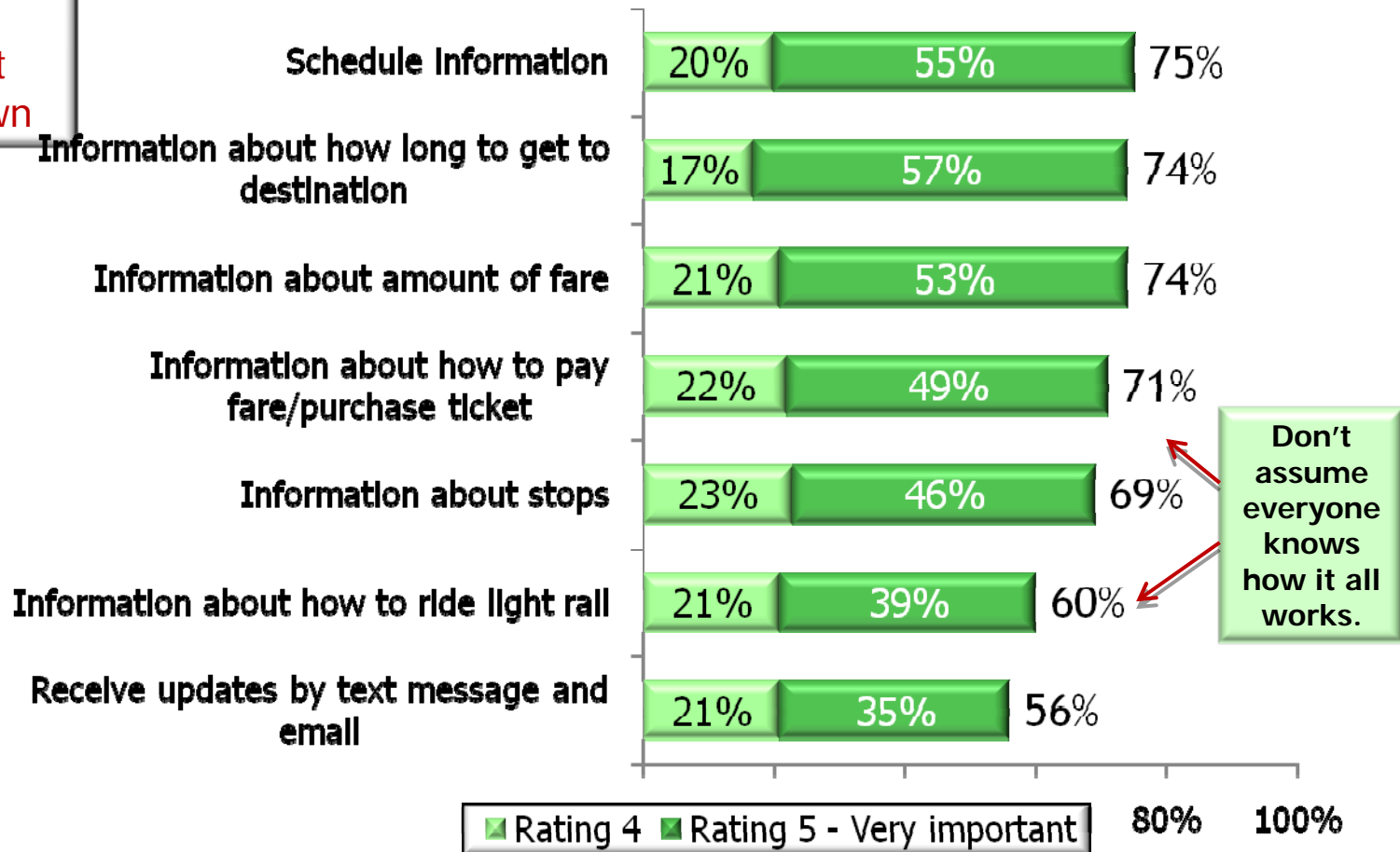
Q40/50. Why are you not likely to ride The Tide?



Importance of
specific types of
information

Intercepted
downtown:
Work/
student
downtown

Not Having the Right Information about The Tide Can Be an Obstacle; A Variety of Different Types of Information Are Important – Including the Basics about How to Ride The Tide and How to Purchase a Ticket



Q50. How important are each of the following in deciding to use light rail?



Strategic Implication for The Tide:

Those who say they are not likely to ride The Tide often cite the limited service area. Expect resistance to riding The Tide as long as the service area is limited. Longer term, explore development of messages that educate commuters about the benefits of driving to the station and taking the train to their final destination. Help commuters envision themselves riding The Tide to better able them to recognize and appreciate the benefits.

Strategic Implication for The Tide:

It can be difficult to “combat” some obstacles. Instead, support for The Tide can be grown by focusing on the positives. Commuters would be more likely to ride The Tide if it saved them time, if they could avoid traffic congestion, if it is convenient and if it saved them money – or their employer paid the fare. For marketing light rail, focus on these ideas (to the extent they are true) rather than trying to combat perceived negatives.

Strategic Implication for The Tide:

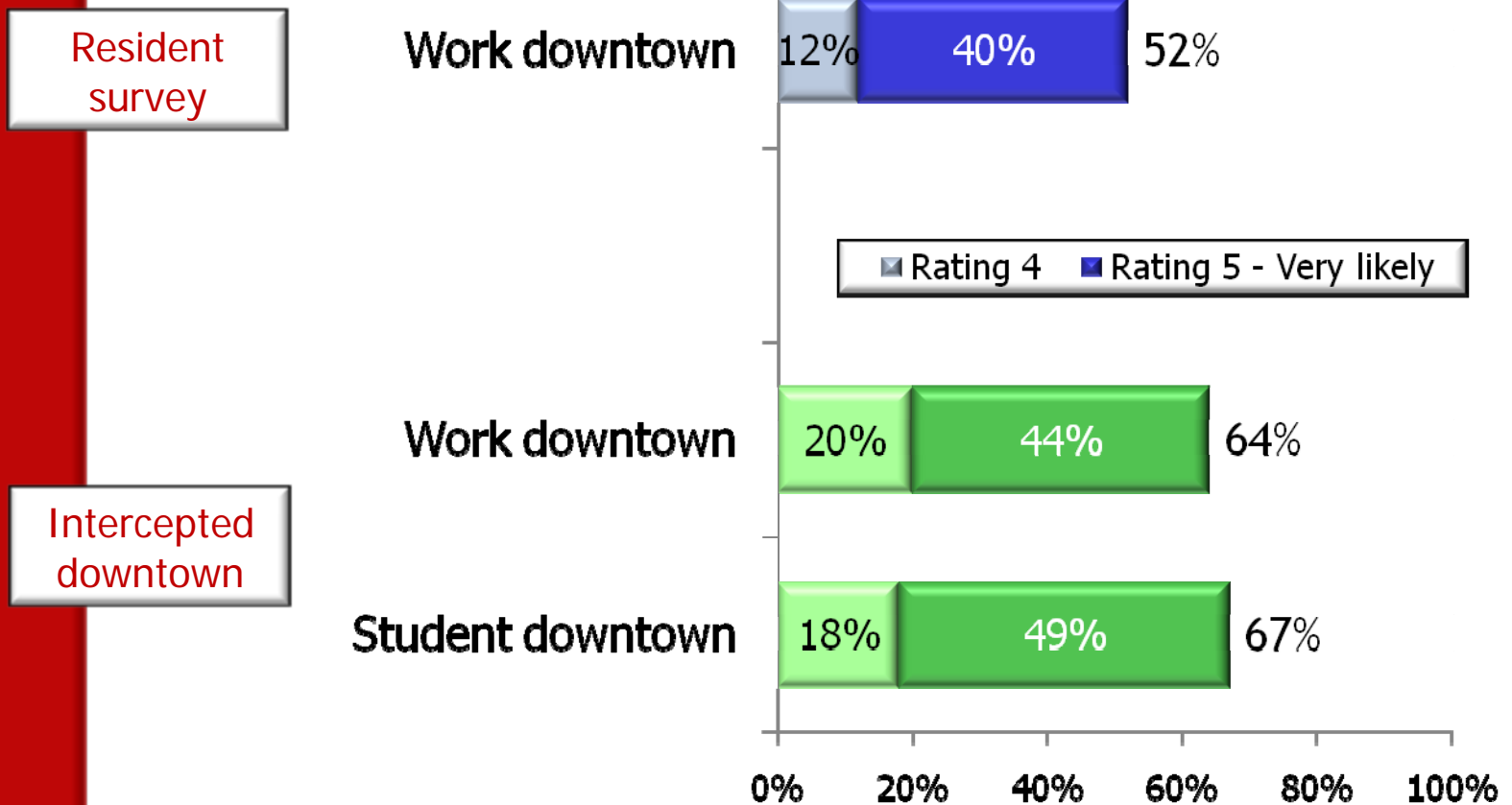
The obstacle of “uncertainty” can be addressed by communicating some basic information about The Tide: what it will cost to ride it, how to buy a ticket, what time it runs, and where it goes.

#4

Pricing for The Tide Will Be Important

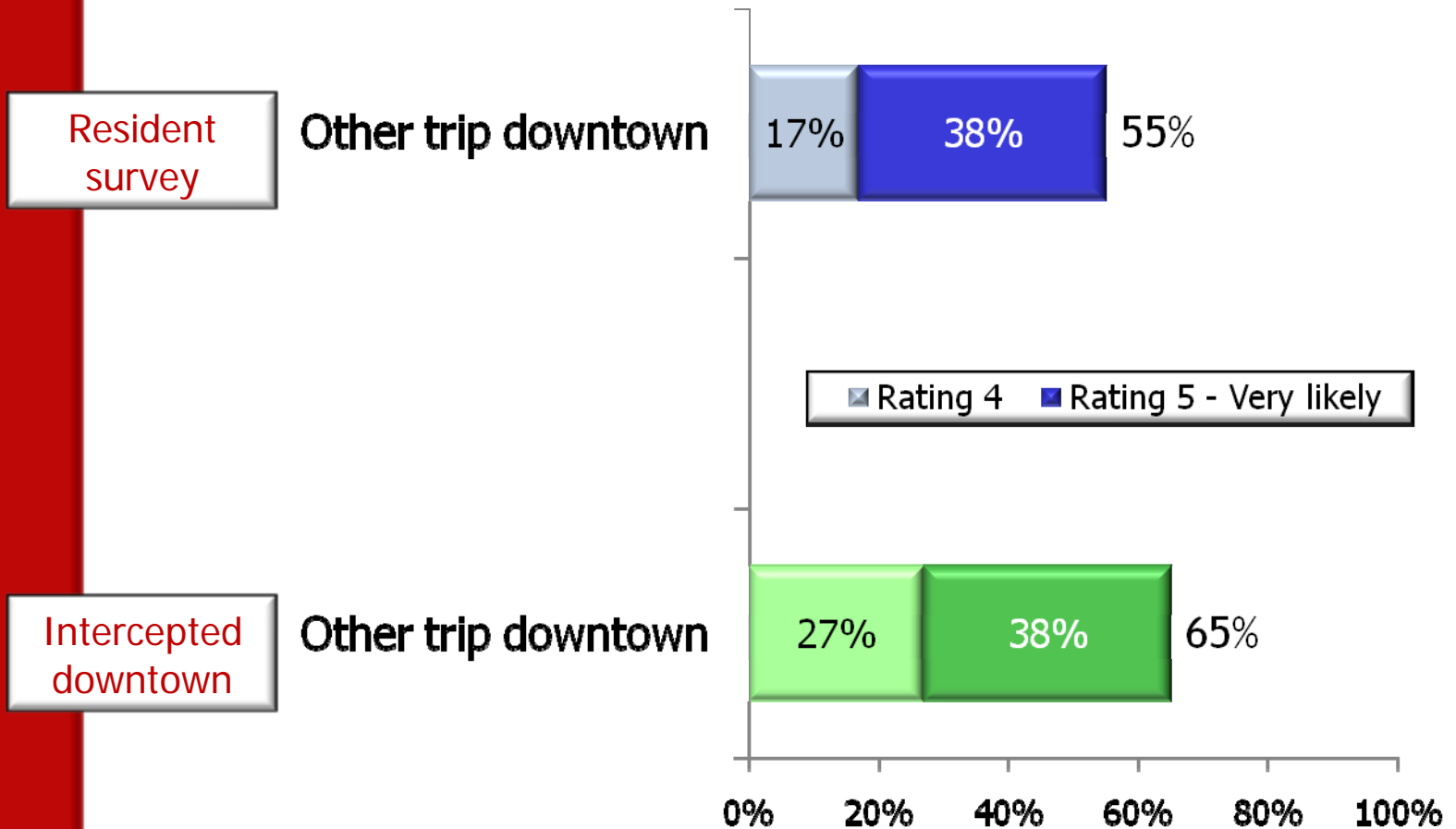
Cost Is Important

Interest in Riding The Tide Is Greater among Workers and Students if Parking at the Stations Is Free and Cost of Fare Is Less than Cost of Downtown Parking



Q29/37a. If you could park for free at the light rail stations and the cost of the fare to ride light rail to downtown area was less than what it costs to park downtown, how likely would you be to ride light rail to work or school at least occasionally?

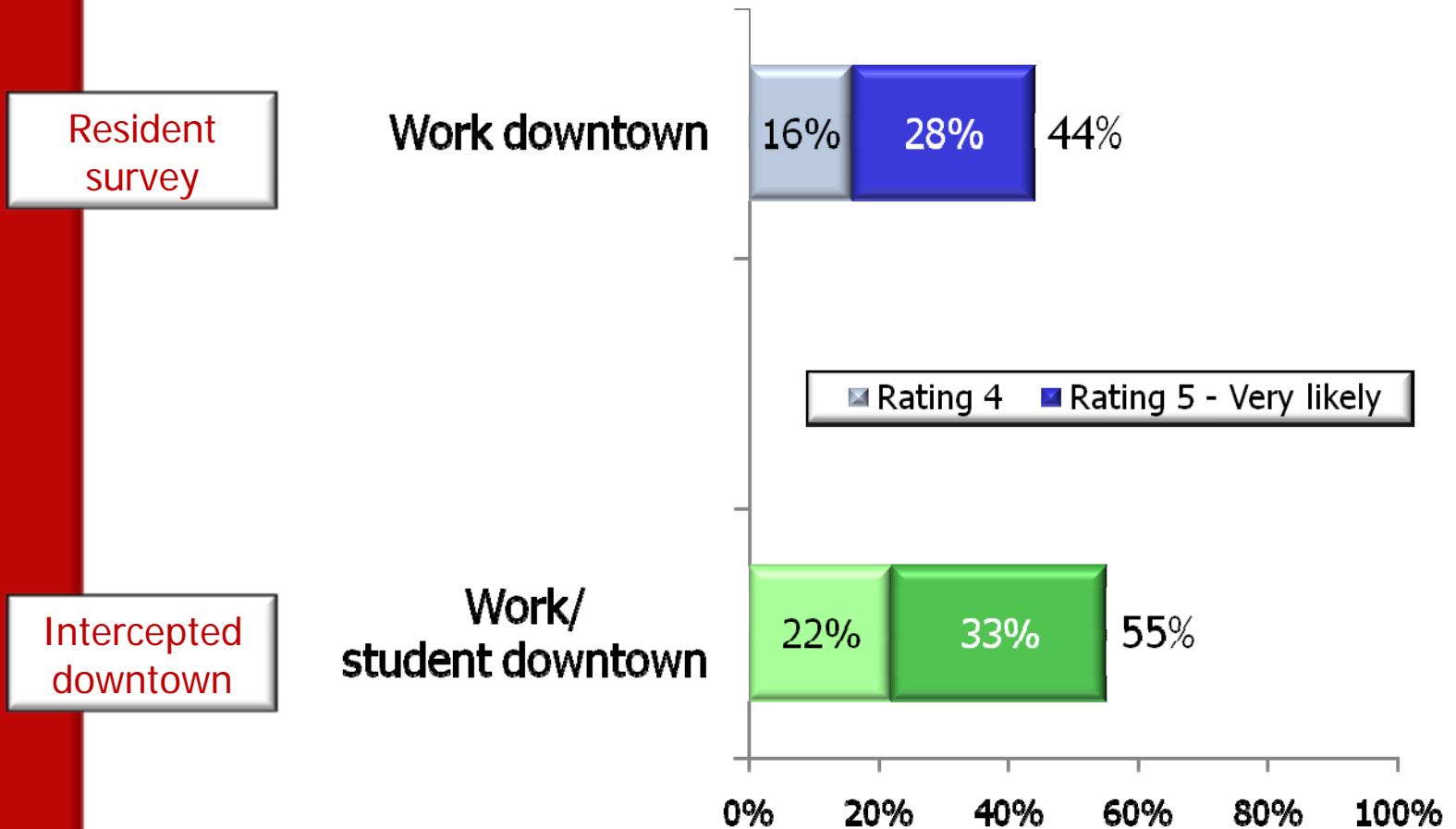
If the Cost to Ride The Tide Is Less than What Driving Would Cost (i.e., less than cost of parking), More than Half of those Going Downtown for Non-work Purposes Say They Would Ride The Tide



Q45/37b-1. If you could park for free at the light rail stations and the cost of the fare to ride light rail to the downtown area was less than what it costs to park downtown, how likely would you be to ride light rail at least occasionally for non-work or school-related trips such as shopping, errands, visiting friends/family, or entertainment?

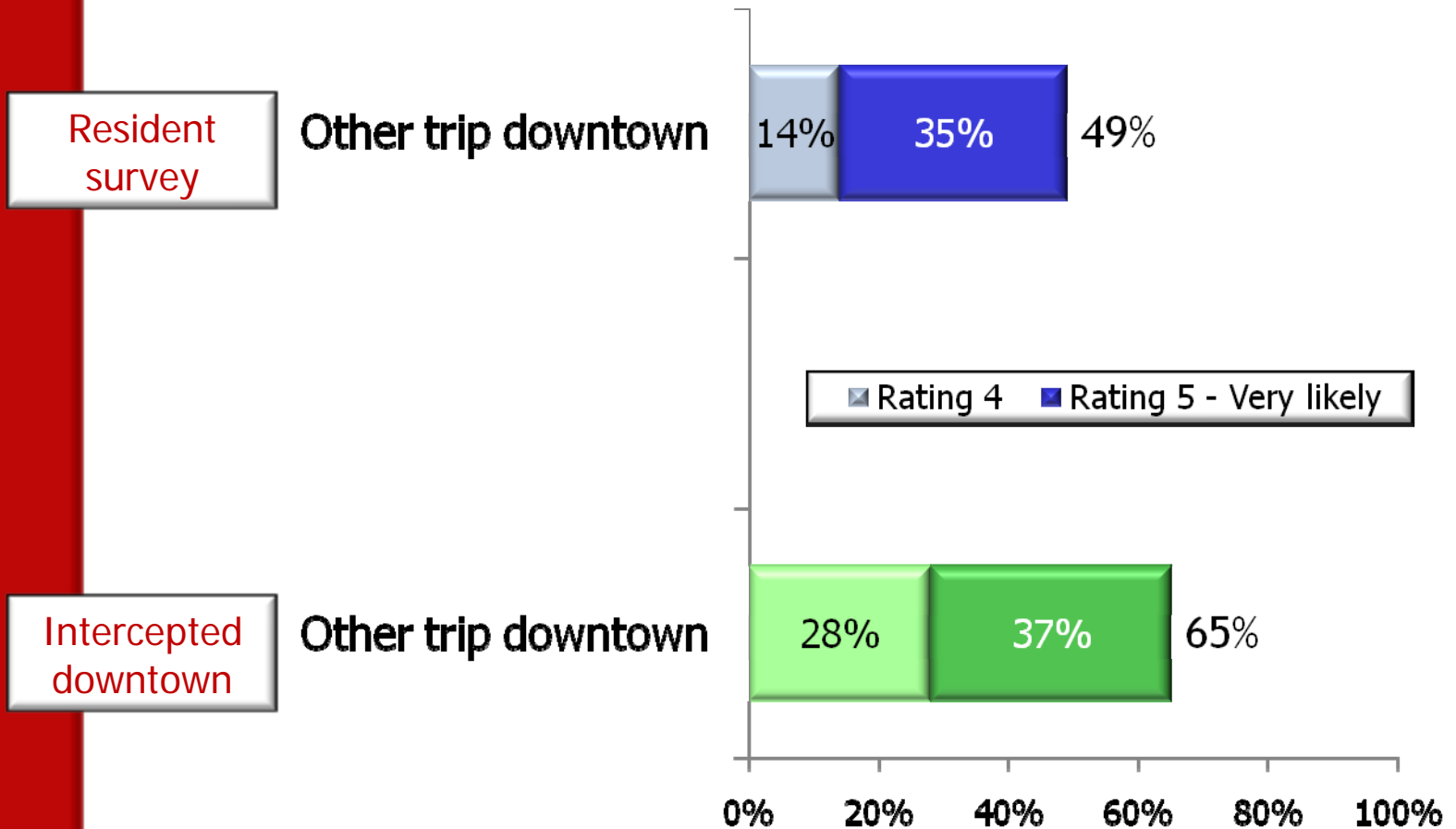


44% of Workers in the Telephone Survey and 55% Intercepted Downtown Say They Could Be Persuaded to Ride Light Rail if Free Parking Were Conveniently Available at The Tide Stations



Q34/44. If free parking were conveniently available at park-and-ride lots at Tide stations, how likely would you be to use light rail for your commute to work or school at least occasionally?

Free Parking at the Train Stations Is Important to Half to Two-thirds of those Going Downtown for Purposes Other than Work



Q44/54. If free parking were conveniently available at park-and-ride lots at Tide stations, how likely would you be to use it at least occasionally for non-work or school-related trips such as shopping, errands, visiting friends/family, or entertainment?

Strategic Implication for The Tide:

Pricing strategy will be crucial to the success of The Tide. Pricing strategy should be relative to the cost of parking in downtown Norfolk.

Strategic Implication for The Tide:

Parking at light rail stations must be free –
and commuters need to know they will not be
charged to park at the stations.

#5

Commuter Support Programs Enhance the Appeal of The Tide

A Third to Half of Downtown Workers Would Use the Tide for their Work Commute at Least Occasionally with Guaranteed Ride

Resident
survey

Work downtown



Rating 4 Rating 5 - Very likely

Intercepted
downtown

Work/
student downtown



0% 20% 40% 60% 80% 100%

Q30/38. The Guaranteed Ride program offers emergency transportation assistance to commuters who rideshare to work. Once you're registered, if you ever have to unexpectedly leave work early or stay at work late, you can get a ride back to your point of origin for just \$3.00, guaranteed. If you could qualify for the Guaranteed Ride program by using The Tide Light Rail, how likely would you be to use The Tide Light Rail for your work or school commute at least occasionally?

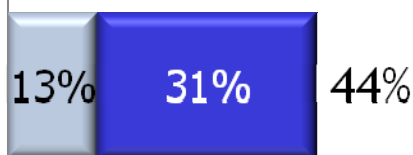


Likely to use
park-and-ride
lot for light rail

Among Workers Who Have a Park-and-Ride Lot Available, 44%-55% Say They Will Use the Lot and Ride Light Rail

Resident
survey

Work downtown



Intercepted
downtown

Work/
student downtown



Rating 4 Rating 5 - Very likely

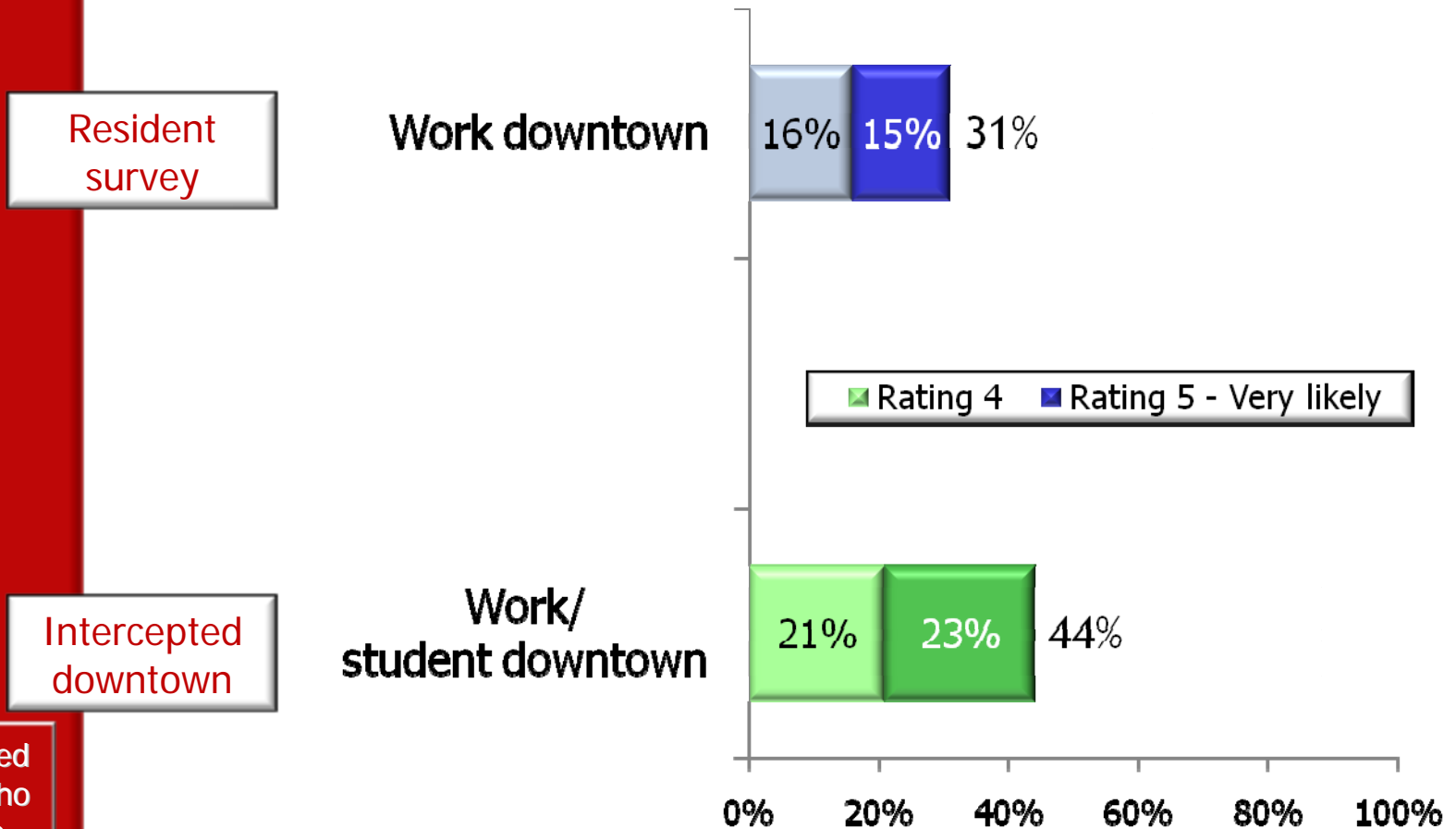
0% 20% 40% 60% 80% 100%

Question asked
of workers who
have PnR lot.
Base small.
Interpret with
caution.

Q32/42. How likely is it that you will use this park-and-ride lot to use light rail?

If park-and-ride lot available, likely to use park-and-ride lot for light rail

Among those Who Do Not Currently Have a Park-and-Ride Lot Available, a Third of those in the Resident Survey and Nearly Half of those Intercepted Downtown Say They Would Use a Park-and-Ride Lot and Ride Light Rail if a Lot Were Available



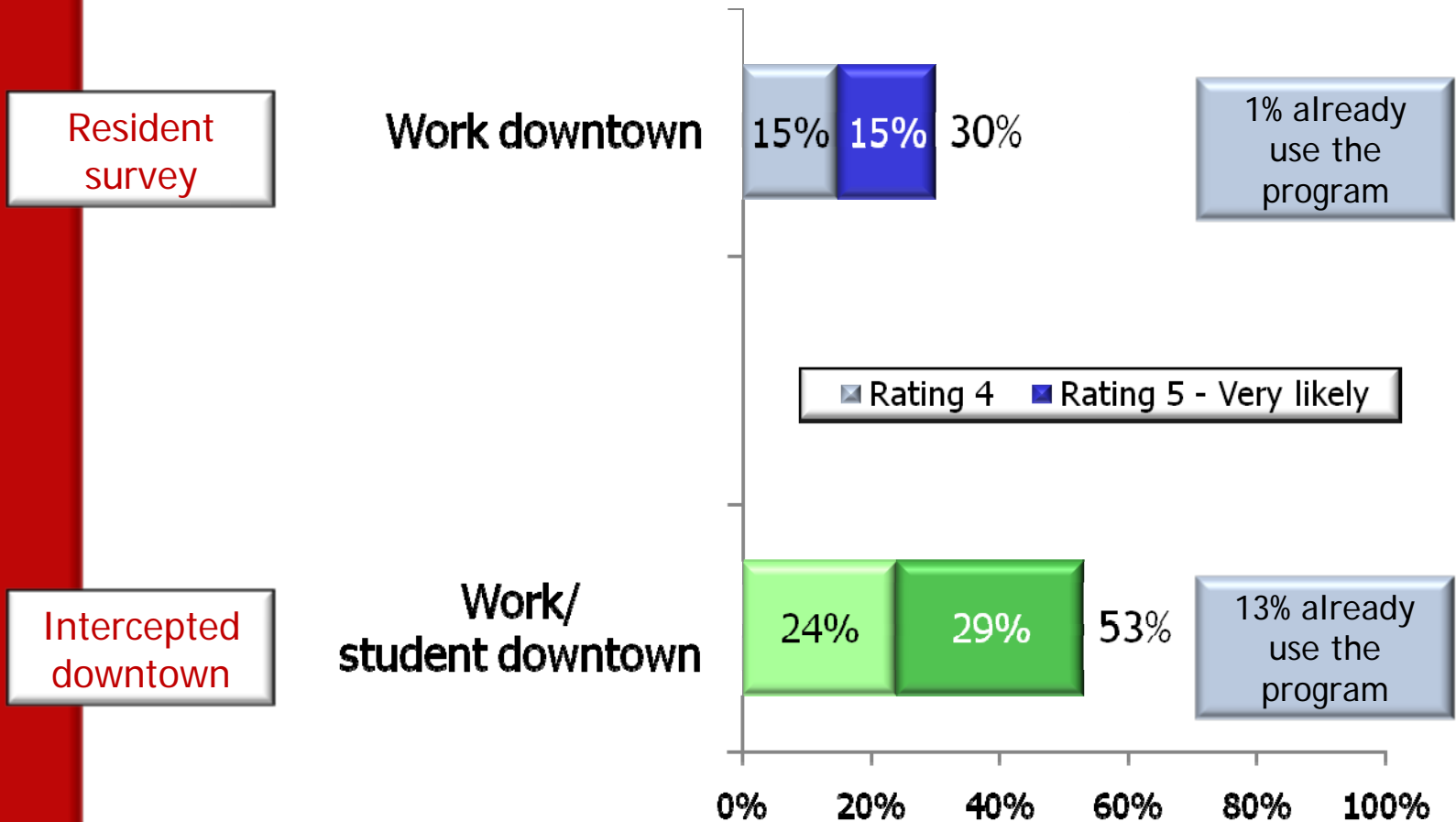
Question asked of workers who do not have PnR lot.

Q33/43. If there were a park-and-ride lot reasonably available on your commute, how likely would you be to use it at least 1-2 days a week in order to use light rail?



Southeastern Institute of Research

Up to a Half of Workers Could Be Persuaded to Ride The Tide With an Incentive Rewards Program



Q36/46. Suppose you could earn reward points for riding light rail to work. Each time you commute to work using light rail, you would earn rewards or points that could be redeemed at numerous retailers for the purchase of goods or services. How likely are you to participate in this program and use light rail for your work commute?

Strategic Implication for The Tide:

Take advantage of a program already developed and offered: Guaranteed Ride. Ensure that Guaranteed Ride is available for The Tide commuters. Previous SIR research has reported that awareness of the Guaranteed Ride program is fairly low. Increase awareness of this program among commuters and potential light rail users.

Strategic Implication for The Tide:

A rewards incentive program enhances the appeal of light rail for some commuters. Again, take advantage of a program that is already in place by offering rewards for commuting via light rail. Tell commuters about this program.

#6

There Is a Sense of
Curiosity about The Tide
that Attracts Riders

Reasons would use The Tide for trips other than work or school

Workers and Students Would Ride Light Rail for Non-work Trips to Avoid Traffic, because It's Convenient, to Avoid Parking Problems, and to Save Money – Plus, They Are Curious and Want to Experience Light Rail

Only responses of 2% and higher are shown.

| | Resident Survey | Intercepted Downtown |
|---|-----------------|-----------------------|
| | Work downtown | Work/student downtown |
| Avoid traffic | 18% | 6% |
| Convenient | 17% | 17% |
| Avoid hassle of parking | 11% | 8% |
| Save gas | 10% | 9% |
| For the experience/I'm curious/to test it/fun | 10% | 13% |
| Support public transportation | 10% | 2% |
| Better for environment | 9% | 4% |
| Save money | 7% | 17% |
| Save time/faster | 4% | 6% |
| Save cost of parking | 1% | 5% |
| Less stress | 1% | 4% |
| It's easy | - | 3% |
| Support light rail | 1% | 3% |
| Support the project | - | 3% |
| It's safe | 1% | 2% |

Q40/49. Why would you be likely to ride the light rail?



Strategic Implication for The Tide:

Take advantage of local curiosity about and willingness to try light rail. To stimulate trial, consider offering free rides/trips with the opening of the service. Ensure that the experience is a positive one. Have “guides” at the stations to explain how to pay fares, how to board and exit, and to answer questions. Work with downtown retailers and restaurants to offer “The Tide Special” during this trial period (e.g., free appetizer with meal). Make initial riding of The Tide a good experience so that those testing the service will come back – and they will tell others.

#7

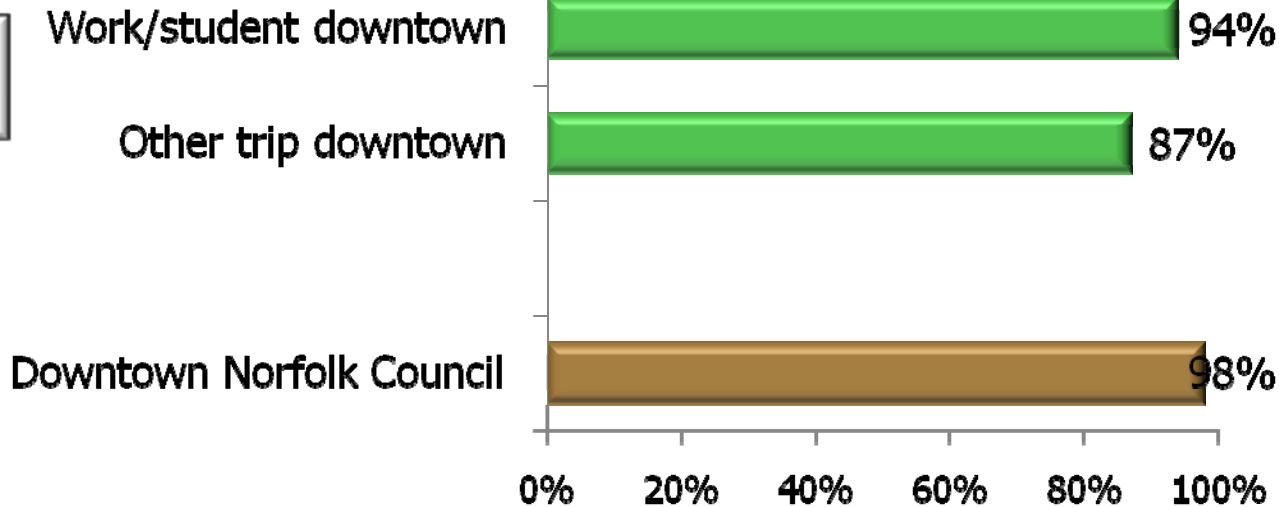
Business Leaders Are Potential Apostles for The Tide

Nearly All of the DNC Are Aware of The Tide

Resident
survey



Intercepted
downtown

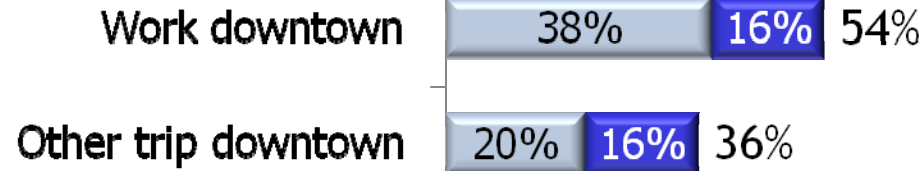


Q3/21. Prior to this survey, had you read or heard anything about The Tide Light Rail?

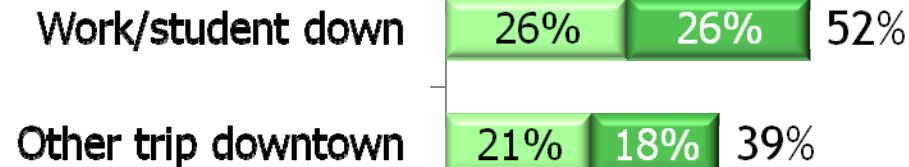
Familiar with
The Tide

Among those Aware of The Tide, Members of the DNC Are Most Likely to Say They Are Familiar with The Tide

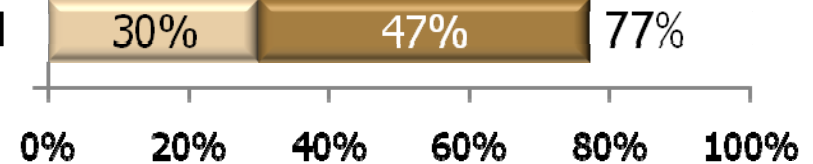
Resident
survey



Intercepted
downtown



Downtown Norfolk Council



Question asked
of those who
were aware of
The Tide.

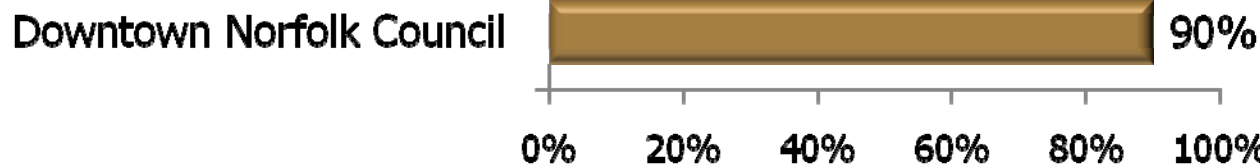
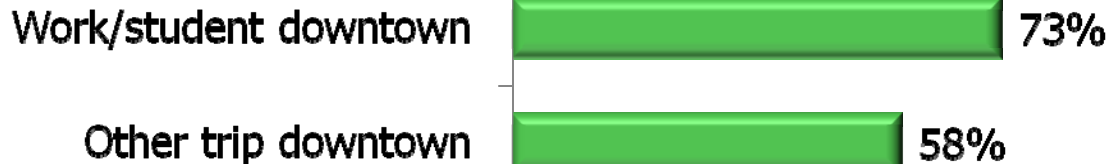
Q4/22. How familiar are you with The Tide Light Rail?

Members of Downtown Norfolk Council Are More Likely to Know Where the Stops Will Be Located

Resident
Survey



Intercepted
downtown

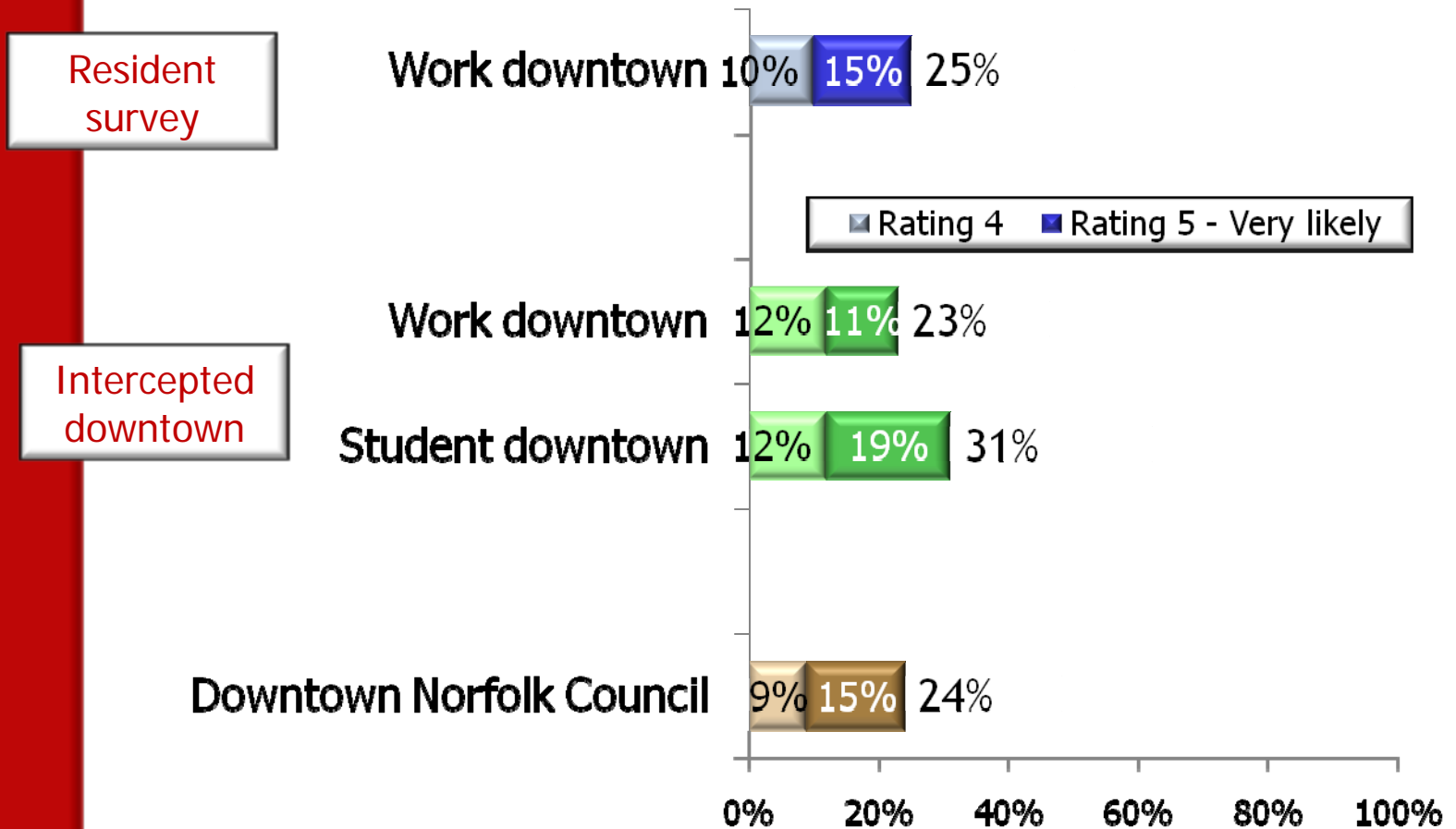


Question asked
of those familiar
with The Tide.

Q5/21. Do you know where the new Tide station stops will be located?

Likelihood of
riding The Tide
for work or
school commute

DNC Respondents Are as Likely as Others to Say They Will Ride The Tide



Q24/31. When The Tide Light Rail is completed and open for use, how likely will you be to use it at least occasionally for your regular commute to work or school?



Reasons would
use The Tide
for work/school
commute

The Reasons for DNC Members to Ride The Tide to Work Are Remarkably Similar to those in the Telephone Survey and those Intercepted Downtown

| | Resident Survey | Intercepted Downtown | Downtown Norfolk Council |
|---|-----------------|--------------------------|-----------------------------|
| | Work downtown | Work/student downtown | |
| Convenient | 26% | 16% | 24% |
| Avoid traffic | 14% | 11% | 11% |
| Save money | 11% | 19% | 24% |
| Less hassle/stress | 11% | 5% | 11% |
| Better for environment | 11% | 2% | 11% |
| Save time/faster | 9% | 16% | 11% |
| Save gas | 6% | 14% | 13% |
| Protect car from wear and tear | 6% | 3% | 6% |
| I support public transportation | 6% | 2% | 9% |
| It's easy | 3% | 6% | 2% |
| Not have to worry about parking | 3% | 5% | 2% |
| I support light rail | - | 4% | - |
| No car | - | 4% | - |
| Train is faster than bus | - | 3% | - |
| For the experience/I'm curious/ to "test" it | 7% | 9% | 6% |

Only responses
of 2% and
higher are
shown.

Q26/34. Why are
you likely to ride
The Tide Light
Rail?

Reasons would not use The Tide for work/school commute

DNC Members Who Will Not Likely Ride The Tide Are Especially Likely to Say that It Is Because The Tide Does Not Serve Where They Live; Otherwise, Their Reasons Are Very Much Like Others Who Say They Are Not Likely to Ride

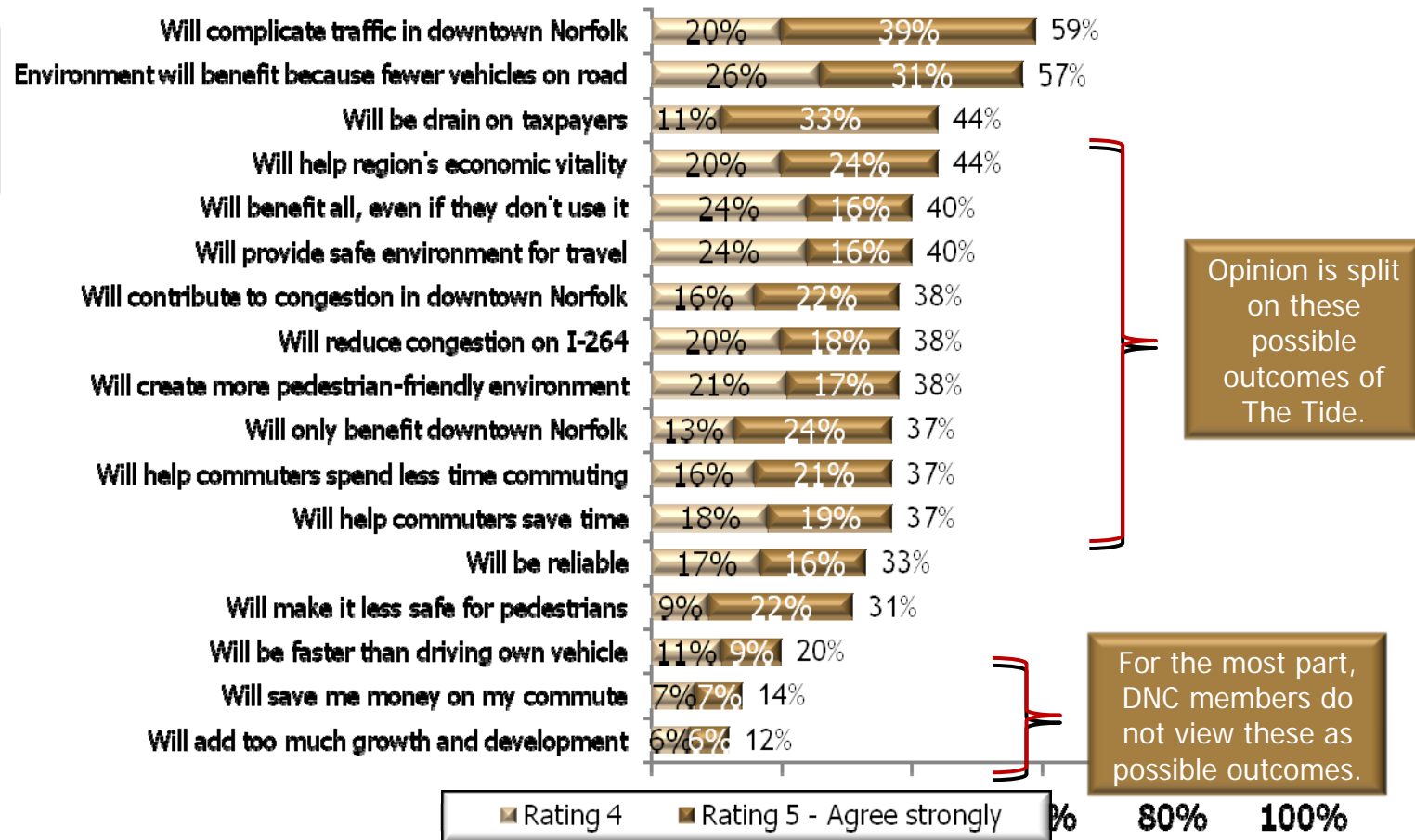
| | Resident Survey | Intercepted Downtown | Downtown Norfolk Council |
|--|-----------------|-----------------------|--------------------------|
| | Work downtown | Work/student downtown | |
| Does not serve where I live | 26% | 9% | 57% |
| Serves limited area/not near destination | 24% | 53% | 13% |
| Not convenient | 10% | 2% | 11% |
| Have own vehicle/easier to drive | 9% | 8% | 5% |
| Want flexibility | 8% | 8% | 5% |
| Criticism of the light rail project | 5% | 2% | - |
| Commute is too short | 3% | 7% | 5% |
| Don't like people on public transportation | 3% | - | 2% |
| I have no need | 3% | 1% | 2% |
| Safety concerns | 3% | 3% | 4% |
| Don't like crowds | 3% | - | - |
| Takes too long/delays | 2% | 12% | 10% |
| Location of stops | - | 2% | 1% |
| Does not help at tunnels | - | 3% | 1% |
| Cost | - | 2% | 2% |
| Don't use public transportation | 1% | 2% | 1% |
| Weather concerns | - | 2% | 1% |

Only responses of 2% and higher are shown.

Q25/32. Why are you not likely to ride The Tide for work or school?

Downtown
Norfolk
Council

Among DNC Members, the Strongest Views of the Outcomes of The Tide See Both the Positive and the Negative: The Tide Will Complicate Traffic in Downtown Norfolk; But, the Environment Will Benefit because there Are Fewer Vehicles on the Road



Q30. Next, I'm going to read you a list of statements about The Tide light rail. Please tell me the extent to which you agree or disagree with each statement.

DNC Members Tend to Be More Likely to See Negative Outcomes of The Tide and Less Likely to See Positive Outcomes

| | Resident Survey | Intercepted Downtown | Downtown Norfolk Council |
|--|-----------------|--------------------------|-----------------------------|
| | Work downtown | Work/student downtown | |
| Will complicate traffic in downtown Norfolk | 41% | 41% | 59% |
| Environment will benefit | 67% | 59% | 57% |
| Will be drain on taxpayers | 42% | 38% | 44% |
| Will help region's economic vitality | 46% | 48% | 44% |
| Will benefit all, even if they don't use it | 52% | 52% | 40% |
| Will provide safe environment for travel | 49% | 47% | 40% |
| Will contribute to congestion | 25% | 28% | 38% |
| Will reduce congestion on I-264 | 45% | 48% | 38% |
| Will create more pedestrian friendly environment | 48% | 45% | 38% |
| Will only benefit downtown Norfolk | 54% | 40% | 37% |
| Will help commuters spend less time commuting | 43% | 44% | 37% |
| Will help commuters save time | 35% | 44% | 37% |
| Will be reliable | 47% | 41% | 33% |
| Will make it less safe for pedestrians | 13% | 26% | 31% |
| Will be faster than driving own vehicle | 30% | 39% | 20% |
| Will save me money on my commute | 28% | 37% | 14% |
| Will add too much growth and development | 15% | 21% | 12% |

Strategic Implication for The Tide:

Business leaders involved in downtown Norfolk are potential supporters or “apostles” for The Tide. They are aware of and familiar with The Tide. They are as likely as other residents to express interest in riding The Tide. But, they don’t always recognize the benefits of The Tide. Their receptivity to The Tide (e.g., willingness to ride) can become advocacy for The Tide by educating them about the benefits of The Tide – both personal and community benefits. Since DNC members express concern that The Tide will complicate traffic in downtown Norfolk, address this issue head on to ensure their support.

Summary of Key Insights

Summary of Key Insights

- Awareness of The Tide is high. But, understanding or familiarity with the service is much lower. Familiarity with The Tide is necessary for trial. Awareness alone will not build support for and use of the service. Familiarity, understanding and favorability will need to be grown to foster trial.
- Residents recognize many benefits of The Tide. But, they tend to recognize community benefits rather than personal benefits. Personal benefits tend to drive travel mode choices. To encourage trial of light rail, messages will need to focus on individual benefits, such as dependability, getting to work on time, convenience, saving time, and saving money.
- There are several perceived obstacles to using The Tide. The limited service area may hinder trial among some. Over time, educate commuters about the benefits of driving to the station and taking the train to their final destination. In the short term, focus on the benefits of The Tide rather than trying to overturn negatives.

Summary of Key Insights

- Pricing strategy will be crucial to the success of The Tide. Pricing should be relative to the cost of parking. Free parking at light rail stations matters to commuters. If parking is free, tell them so.
- Commuter support programs enhance the appeal of The Tide. Both Guaranteed Ride and the incentives reward program increase the likelihood of riding The Tide. Increase awareness and understanding of these programs.
- There is a sense of curiosity about The Tide that attracts riders. This curiosity can be used to stimulate trial by offering “free” trips with service launch specials and promotions.
- Business leaders are potential apostles for The Tide. They are aware and familiar with The Tide; and, they are willing to ride it. But, they don’t always recognize the benefits of it. By educating them about the benefits, these community leaders can become advocates for The Tide.