5   Market Analysis of Future Service Areas

As part of the current Long Range Transit Plan Update, we previously presented – as part of a prior section of this report – a socio-demographic analysis of the Saint Cloud metropolitan area. The purpose of this section is to present this data as a *Market Analysis Summary Report* and thus explicitly indicate which potential new service areas will or will not be served by proposed modifications to the Metro Bus fixed route bus system, as some areas would not likely be able to support effective and efficient fixed route service.

Transit Success Score

As part of the socioeconomic analysis, a "Transit Success Score" was developed and presented in Section 2.9.   A series of variables was utilized in developing the Transit Success Score; both demographic and socioeconomic information was collected from the U.S. Census Bureau for the region and subsequently divided into smaller geographic units such as tracts and block groups. Block groups were used for this analysis.   Transit-oriented variables used for the analysis include:

- Overall Population Density
- Density of the Population under the age of 18
- Density of the Population over the age of 65
- Density of Persons with Disabilities
- Median Household Income
- Per Capita Income
- Percentage of the Population Living Below the Poverty Level
- Percentage of Zero-Car Households

Each of these variables has a strong correlation with transit success. Transit is most often successful in areas of high population density and in areas with high youth and senior populations. Transit is also traditionally successful in areas with low household and per capita income, high percentages of people living below the poverty level, and high percentages of households without vehicles available.

Figure 5-1 maps the probability of transit success for the City of Saint Cloud. In the APO region, the highest probabilities of transit success exist in the immediate metropolitan area surrounding Saint Cloud. The best probability of finding resident riders exists in eastern downtown Saint Cloud. Since 2009, additional areas of possibly-high transit success include the southern part of Sauk Rapids along South Benton Drive (County Highway 33) and west Saint Cloud toward Saint Joseph along County Highway 75. Other pockets of high potential exist throughout Saint Cloud. The probability of moderate success extends from Saint Cloud outward to Sartell, Sauk Rapids, Saint Joseph, and Waite Park. These resident transit indicators were also compared to major employers and major trip destinations as part of the socioeconomic analysis.

Figure 5-1 – Transit Success Score
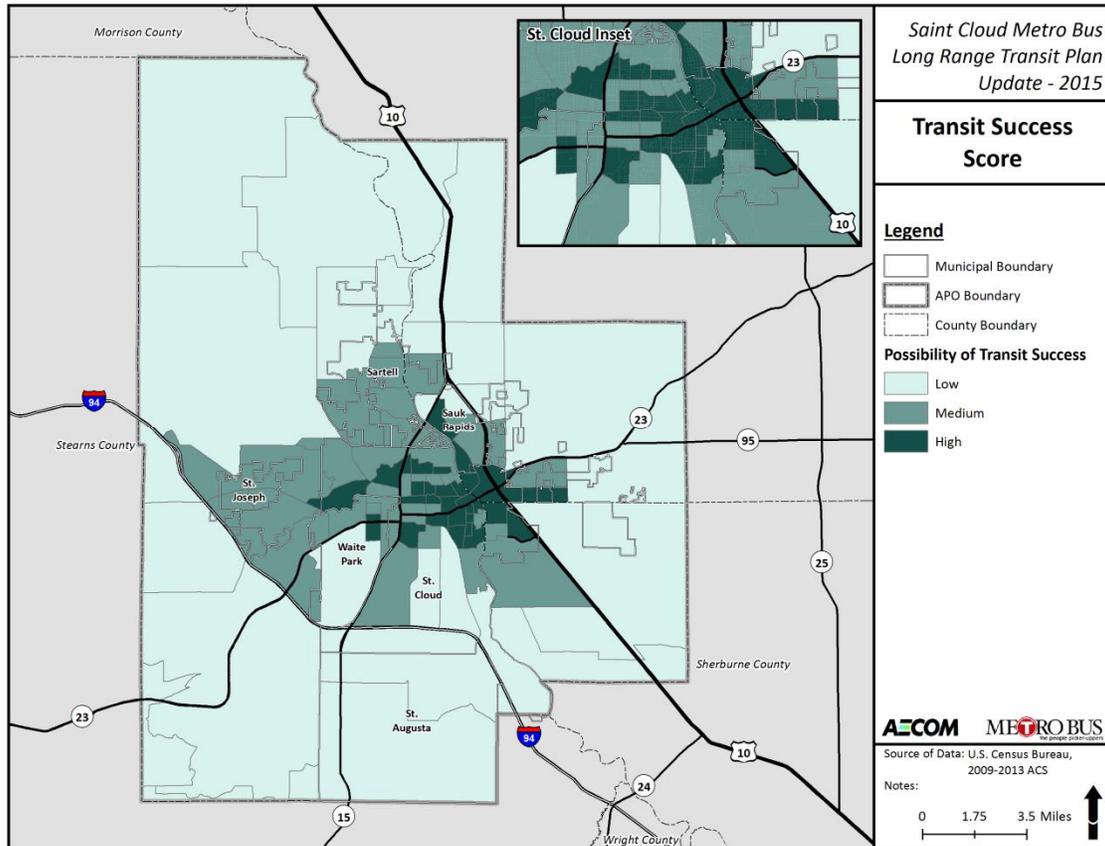
Fixed Route Metro Bus Service Areas

As part of the Transit Development Plan, several areas were identified – via a variety of outreach efforts – as potentially being new service areas for Saint Cloud Metro Bus fixed route service.

After analysis of both the Transit Success Score presented above, as well as the locations of several major trip destinations and employers (all presented in Section 2), it was determined that the following potential new service areas would be examined for potential new Metro Bus fixed route service:

- Saint Joseph
- Lincoln Avenue NE area

Conversely, it was determined that the following potential new service areas would likely not warrant new Metro Bus fixed route service within the planning horizon of this Long Range Transit Plan Update:

- Saint Cloud Airport
- Opportunity Drive area
- Saint Augusta
- 33rd Street South corridor

- Industrial development areas located well east of the city along State Route 23

Conclusion

The intent of this section is to explicitly indicate which potential new service areas the study team will pursue in terms of possible new fixed route Metro Bus service. The other service areas mentioned above are not being pursued in terms of fixed route Metro Bus service, but may be served by some other service type.