

Customer Benchmark Survey Report - 2020b



UTA Benchmark Survey

2020b and April 2021 Pulse Survey Report

May 26, 2021

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The Process



Research Objectives

- **Survey designed to guide communications and marketing strategy by assessing:**
 - Overall public perception of UTA as an organization
 - Public perception of UTA services
 - High-level indicators of why people ride/don't ride
 - Broad indicators of potential motivators to ride
 - Where people look for information about riding UTA
 - Impact of the COVID-19 pandemic on use of UTA services



Research Highlights

Data from the 2020b Benchmark Survey is a snapshot of an unprecedented point in time. Yet, despite challenges posed by the pandemic, UTA has experienced positive momentum in recent years, and this is further echoed in the most recent mid-year pulse survey.

- Riders who ceased use due to COVID-19 did so because UTA stopped being necessary during the pandemic – many commuters transitioned to a work-from-home setup; events were canceled; school went virtual; and businesses closed.
- While some residents say there's nothing UTA can do to make them feel safe riding during the pandemic, others desired masks, regular sanitizing and social distancing – efforts UTA proactively implemented during the pandemic.
- Despite the challenging year, UTA saw an increase in key metrics over five years.



Research Highlights (cont.)

- A more recent pulse survey shows that more residents are seeing messaging about UTA's efforts to keep riders safe during the pandemic.
- Many residents agree that UTA is reliable, safe and easy, as well as being good for students, the community, and the environment.



Focus Groups

- **Three virtual focus groups including 17 participants (even mix of men/women)**
 1. 6 non-riders (have not used UTA services in >2 years)
 2. 6 riders (have used UTA services <2 years)
 - Mix of service use (TRAX, Bus, FrontRunner)
 - Mix of payment methods (self-pay, employee/student pass, etc.)
 3. 5 COVID-19 (riders who have stopped use of UTA entirely since outbreak of COVID-19 began)



Non-riders

Moderate
Familiarity

Despite not using UTA services, nonriders tend to be at least somewhat familiar with the available services. This could be due to past use or knowing someone who uses UTA services.

Describing UTA

Overall, nonriders seem to have more of a negative perception of UTA. They see it as a something people use out of necessity, and some describe UTA as a “flighty friend” who is hit or miss. It is sometimes likened unto discount stores or check-cashing companies: businesses that they avoid but know are there if absolutely necessary.

Inconvenient

Many believe the service itself is inconvenient. In fact, inconvenience plays a large role in their decision not to ride – they don’t see it as practical for everyday errands, believe it takes more time, and some say north/south routes on the west side of the valley are lacking. Some also indicate they simply don’t need to use UTA due to being retired or a stay-at-home parent.



COVID-19 Lapsed Riders

Positive Perceptions

This group views UTA as reliable; the friend where “you may not be at the top of their list but are always there if you need them.” Many also compared UTA to migratory birds (traverse great distances, use specific routes) and horses (mode of transportation).

Impact of COVID-19

Everyone here ceased use of their typical UTA service because they simply have no need right now. For many, working from home has obviated the need to commute. For others, events have been cancelled – meaning they do not need to take TRAX downtown.

Returning to UTA

These riders would resume use of UTA if offices reopened or if they had events to go to. Importantly, though, they generally agree they would not be comfortable riding UTA until the pandemic ends.



Current Riders

Positive Perceptions

Riders generally have positive opinions of UTA. Many believe it is convenient and useful. However, there are areas where perceptions can be improved. For example, some riders feel UTA is slow, while others describe UTA as a person you cannot always depend on.

Desired Improvements

Riders are looking for more east/west services, specifically from the Magna and Tooele areas out to the east side. Others feel that service should run more frequently, with the 30-60 minute wait times for FrontRunner specifically cited.

Impact of COVID-19

Prior to COVID-19, many riders used UTA for events, and occasionally commuting. Since the outbreak, use might have slowed but some still find themselves using UTA to get to the airport or other small trips. Riders have mixed perceptions and reactions to the COVID-19 pandemic. Some don't think riding UTA is risky at all, while others have significantly reduced use due to health concerns over the virus.



Benchmark Survey

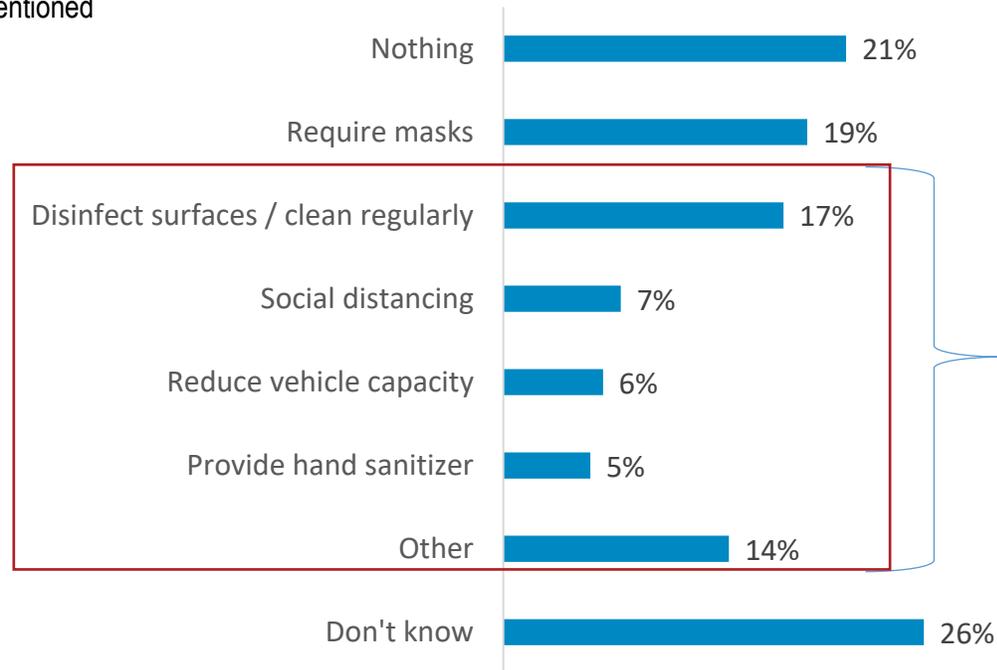
- Telephone and online survey: conducted December 2020
- 602 surveys, margin of error +/- 4%
 - Surveyed four counties (Davis, Salt Lake, Utah and Weber)
 - Demographics:
 - Female = 48% / Male = 52%
 - Balanced mix of respondents
 - Aged 18+ - Employment status - Education - Ethnicity



While just over half indicate some level of concern with riding during the pandemic, most want to know that COVID-19 guidelines are being followed.

What UTA Could Do To Make Residents Feel Safe

% Mentioned



UTA proactively implemented these safety efforts throughout the pandemic. It's possible that residents were unaware due to decreased ridership.

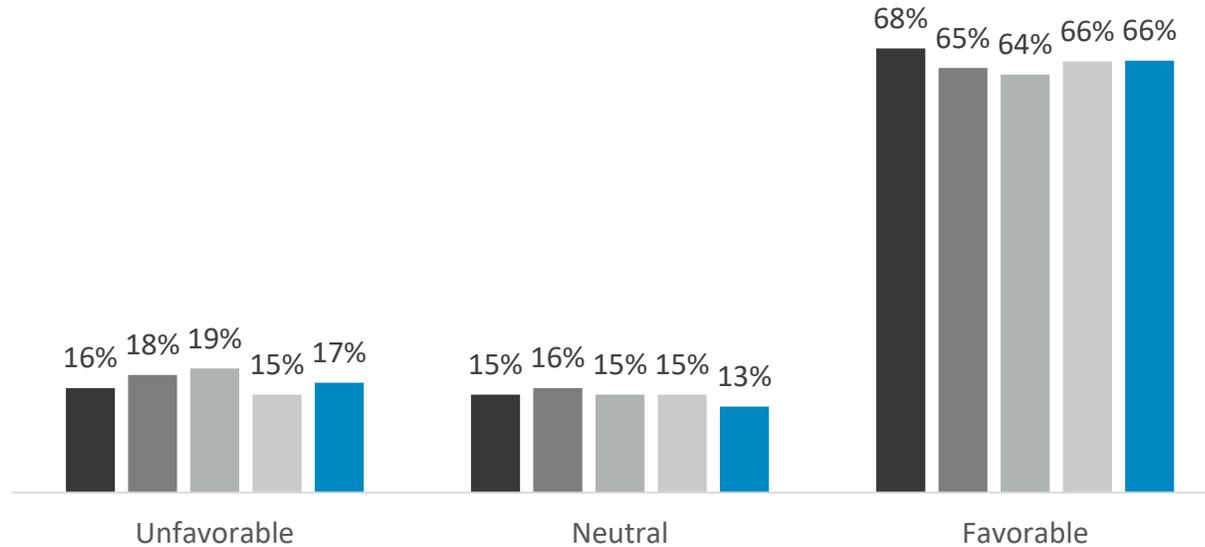


Despite a challenging year, UTA's favorability scores remained level.

Favorability of UTA

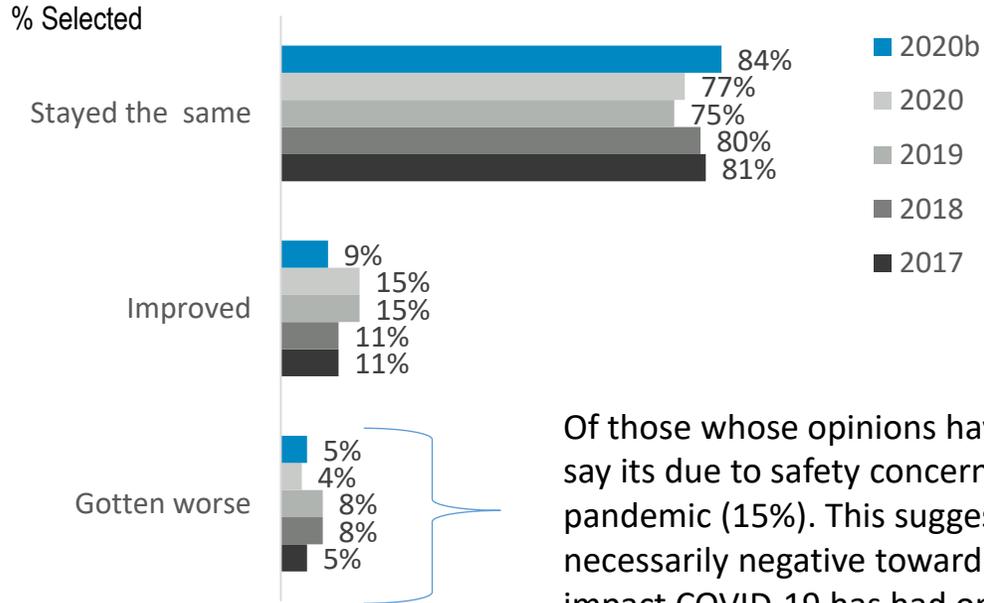
% Bottom-3, % Middle-1, % Top-3

2017 n = 610 2018 n = 600 2019 n = 611 2020 n = 611 2020b n = 602



Residents' opinion of UTA held steady. The few who are negative tend to say it's due to COVID-19 safety concerns.

Change in Opinion of UTA in Past 6 Months (June – December 2020)

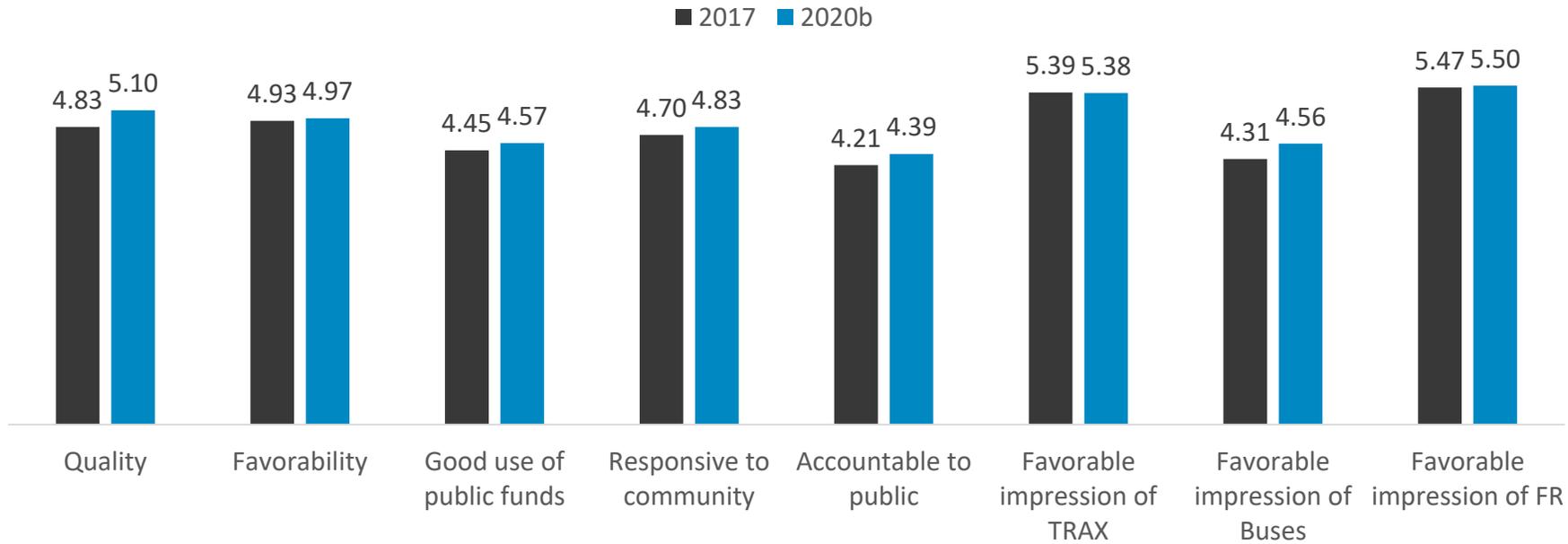


Of those whose opinions have gotten worse, most tend to say it's due to safety concerns around the COVID-19 pandemic (15%). This suggests that these residents aren't necessarily negative toward UTA, but more so toward the impact COVID-19 has had on public transit in general.



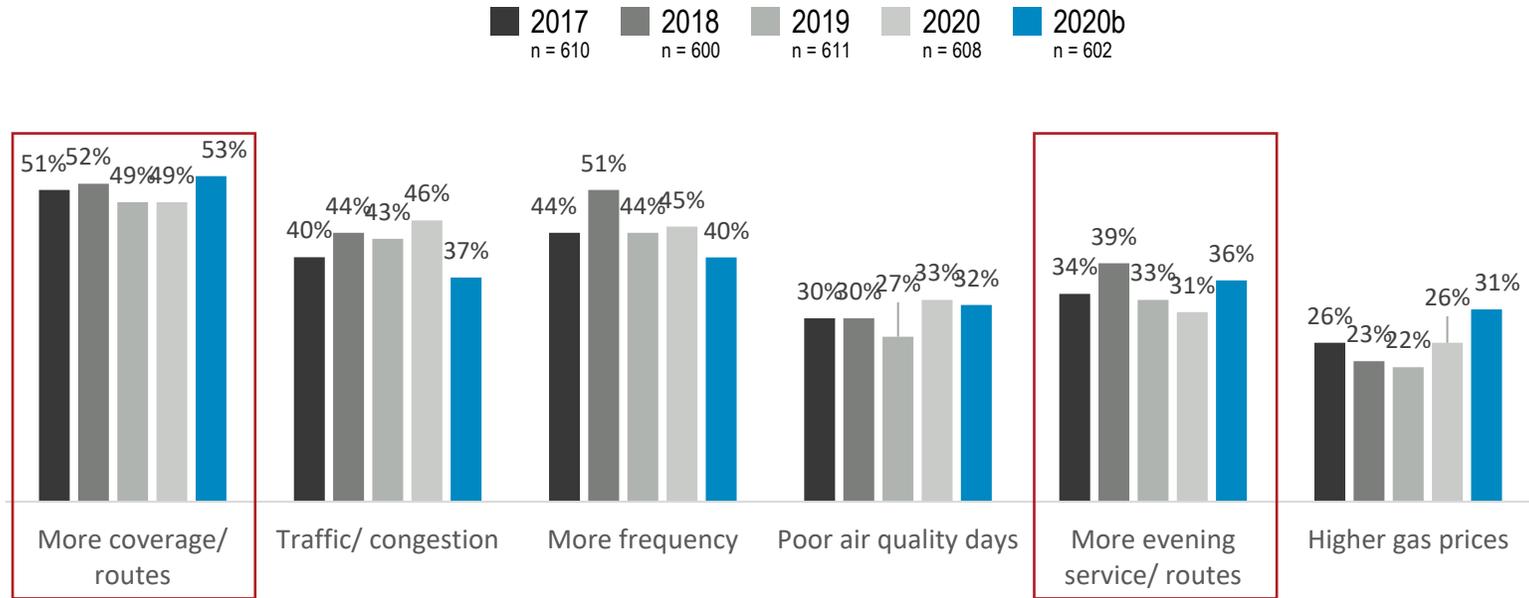
Despite a challenging year, UTA saw an increase in most key metrics over the last five research waves.

UTA Key Metrics
Mean Score, 7-point scale



Increasing coverage and expanding service hours are the options most likely to encourage use of UTA services.

What Would Encourage UTA Use
% Top-2

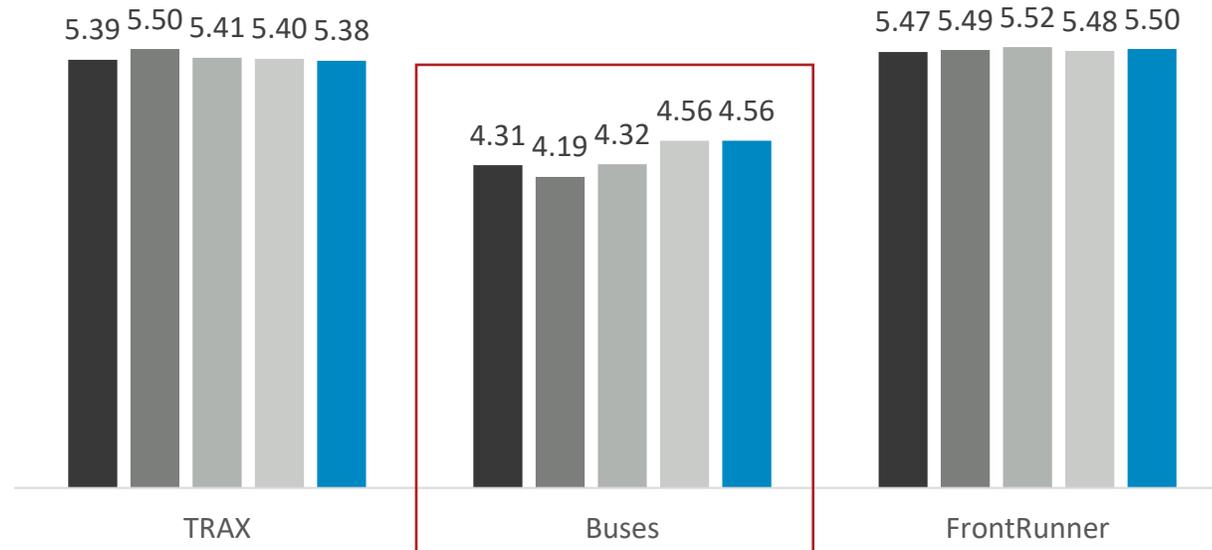


Perception of UTA services has held steady, with bus leveling out after a multi-year increase.

Perceptions of UTA Transportation

Mean Score, 7-point scale

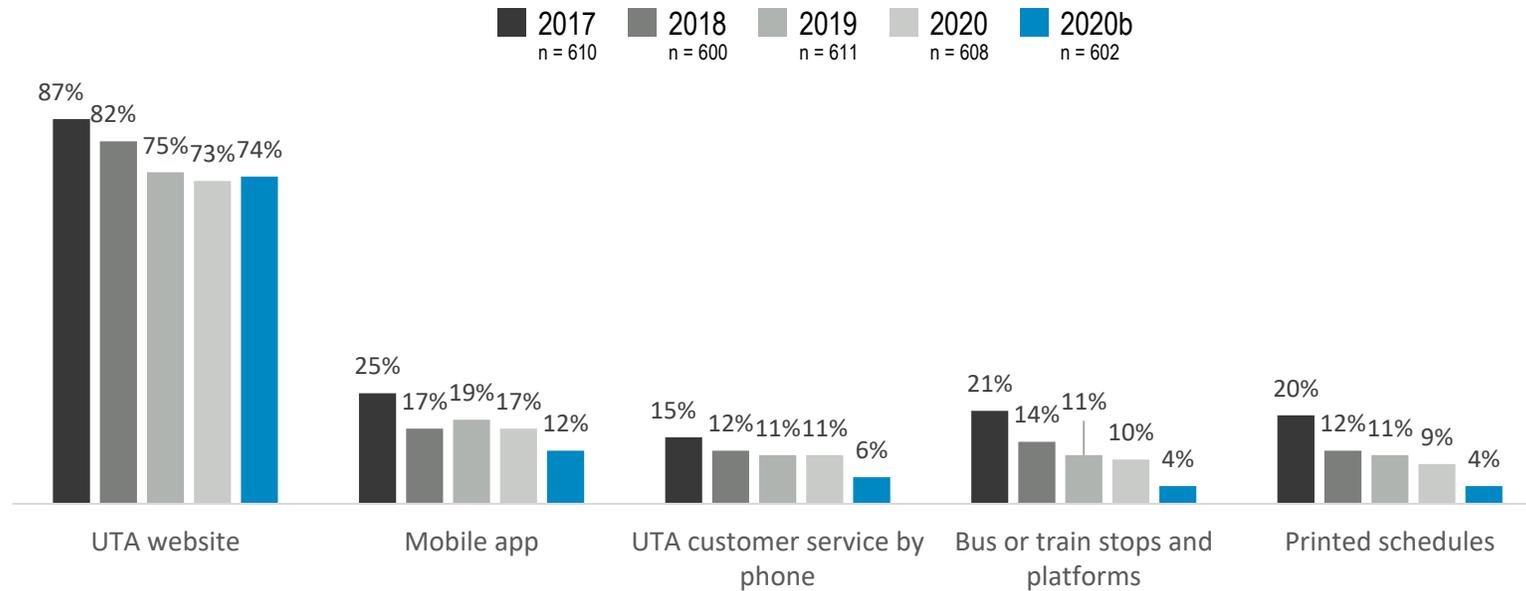
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UTA's website is the clear preference for seeking information about UTA services.

Preferred Source of Info on UTA Services

% Selected



Research indicated UTA's need to reassure the community and:

- **Reaffirm safety and cleanliness.**
- **Emphasize how UTA is supporting the community.**
- **Demonstrate how UTA is reliable, there for riders, and always working in the background to ensure safety remains a top priority.**
- **Drive positive perceptions, even with groups of riders that have no current need to ride, for when needs and circumstances change.**



Spring 2021 Messaging Strategy

- Launched “Forged” on March 3, 2021, a 12-week broadcast and digital campaign reinforcing safety and UTA’s dedication to providing clean, reliable transportation along the Wasatch Front.
- Reassured the public by reinforcing operational safety measures (mask requirement, cleaning protocol, social distancing, etc.) through social, website and *Rider Insider* email communications.
- Followed up with a pulse survey in April 2021.



Mid-year Pulse Survey

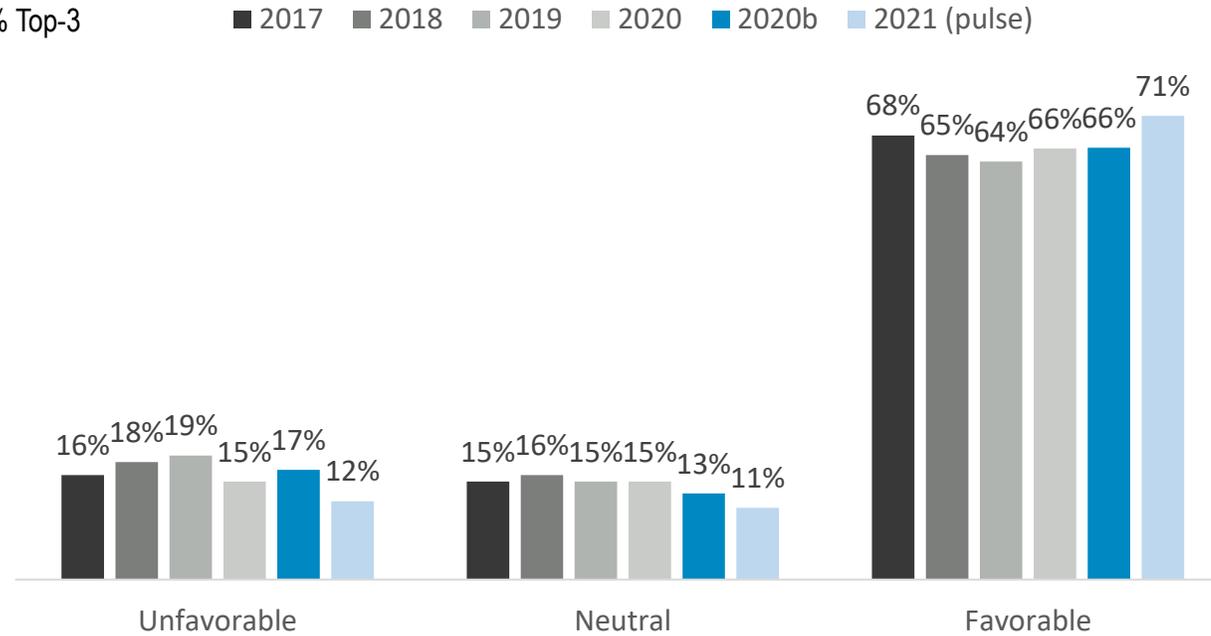
- Online survey: conducted April 2021
- 591 surveys, margin of error +/- 4.03%
 - Surveyed four counties (Davis, Salt Lake, Utah and Weber)
 - Demographics:
 - Female = 49% / Male = 50% / Nonbinary = 1%
 - Balanced mix of respondents
 - Aged 18 - Employment status - Ethnicity



About 7 in 10 have favorable impressions of UTA.

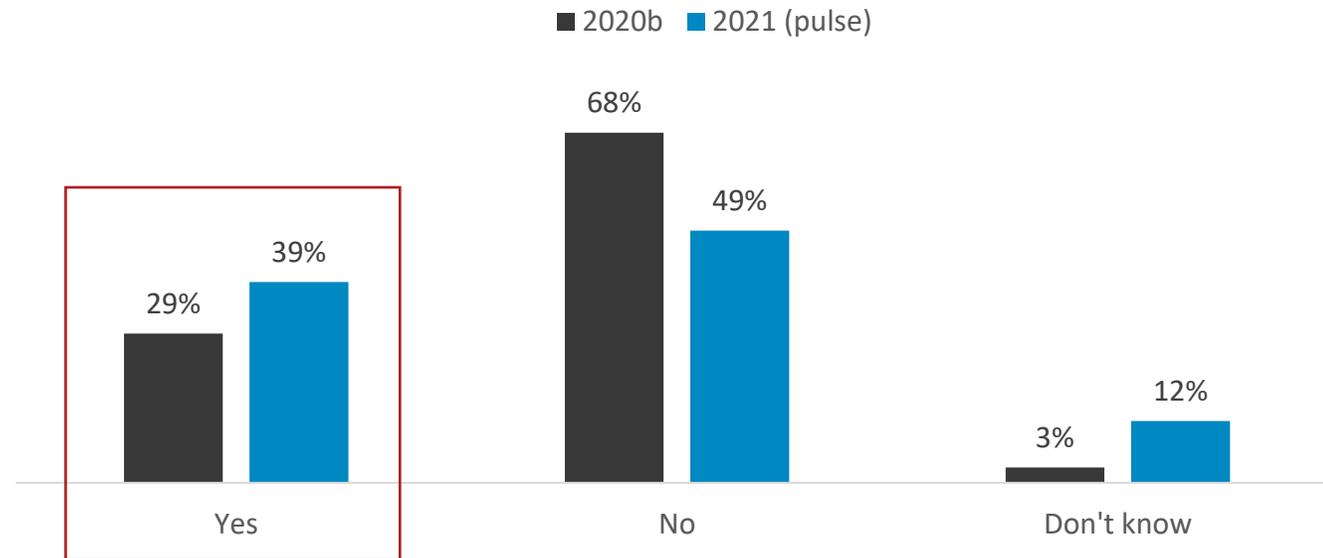
Favorability of UTA

% Bottom-3, % Middle-1, % Top-3



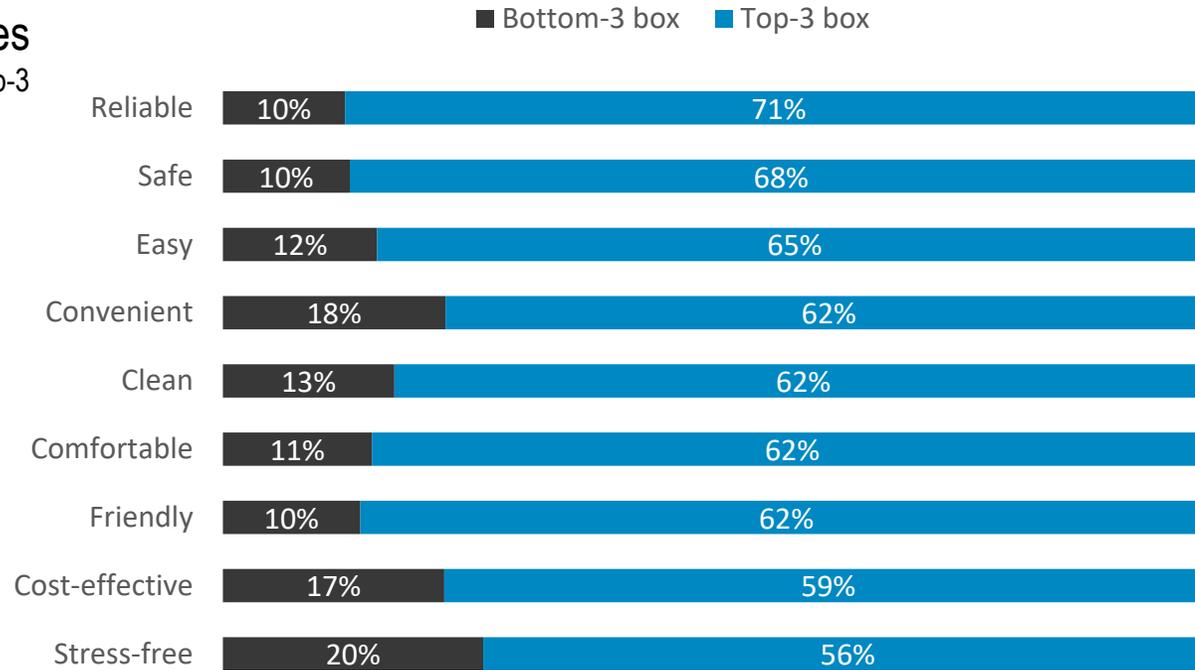
Compared to December, more residents have seen messaging about what UTA is doing to keep riders safe.

Awareness of COVID-19 Messaging



Residents tend to agree UTA is reliable, safe and easy.

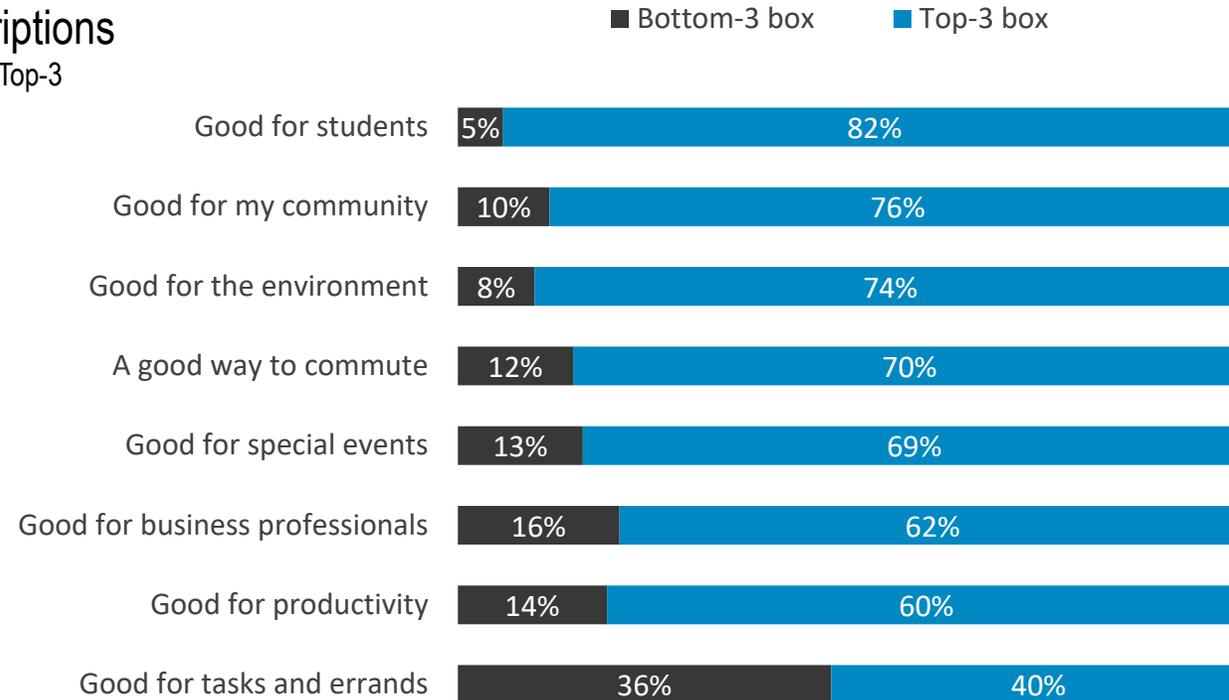
UTA Attributes
% Bottom-3, % Top-3



UTA is mainly seen as being good for students, the community, and the environment.

UTA Descriptions

% Bottom-3, % Top-3



Thank you

