

2022-2023 Benchmark Survey Report

Agenda Item 10.a.



2022-2023 UTA Research

**Presented to UTA Board of Trustees
May 24, 2023**

Presented by:

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Agenda Item 10.a.



Agenda

- 3** Online Community Discussion Group
- 6** Annual Tracking Survey
- 17** Next Steps

Agenda Item 10.a.



Qualitative Research Objectives

Each year, UTA conducts qualitative research to explore what might inspire greater use of UTA services, including:

- Motivations and barriers to using public transportation more frequently
- How to overcome a pervasive “car culture”
- Messaging and/or communication that might incent more frequent ridership
- **Change in methodology**
 - Focus group → Online community discussion group

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Online Community

- **Methodology**
 - Conducted December 2022
 - Three-day online community
 - Welcome activity: Introduction & primary mode of transportation
 - Day 1: Commuting experience, perceptions of UTA & public transportation in general
 - Day 2: Motivations & barriers, designing an ad
 - Day 3: Evaluating Day 2's ads, discussing specific motivators
- **Participant details**
 - N=27
 - Lives in Davis, Morgan, Salt Lake, Summit, Tooele, Utah or Weber County
 - Has ridden public transportation in the past 24 months, but not frequently
 - Mix of demographics

10.a.



Online Community: Key Findings

Barriers	Motivations	Communications
<p>The biggest emotional barrier is association between cars & freedom</p> <ul style="list-style-type: none">• The biggest emotional barrier to overcome is the association of cars with freedom (going where you want and not having to worry about a schedule).• Top frustrations are limited destinations, infrequent/slow service, lack of stations, safety (TRAX), and cost.	<p>Utahns are more likely to ride for leisure than for commuting</p> <ul style="list-style-type: none">• Participants would be most likely to increase usage of public transportation to go downtown with their family or partner.• They would be more motivated to do so if fares were cheaper or free and/or stations were more convenient to their homes and destinations.• Few envisioned increasing usage of public transportation to commute.	<p>As such, compelling messages often highlight the variety of activities in SLC</p> <ul style="list-style-type: none">• The most compelling communications tend to describe all the things you can do in SLC by riding transit.• The next two highest ranked messaging themes involve the benefits of riding transit (e.g., no parking, improving air quality, etc.)



Quantitative Research Objectives

UTA conducts an annual tracking survey to measure public perceptions of the organization and inform strategy.

- Objectives
 - Overall perception of public transportation in general and UTA specifically
 - Understanding the motivations of the infrequent rider
 - Perception of American “car culture”
 - Where people look for information about riding UTA

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Annual Tracking Survey

- **Methodology**
 - Telephone and online
 - Conducted January 2023
- **Participant details**
 - N=636; margin of error +/-3.89%
 - Live in Davis, Salt Lake, Utah, or Weber County
 - Mix of demographics (e.g., gender, age, ethnicity, employment, education, etc.)

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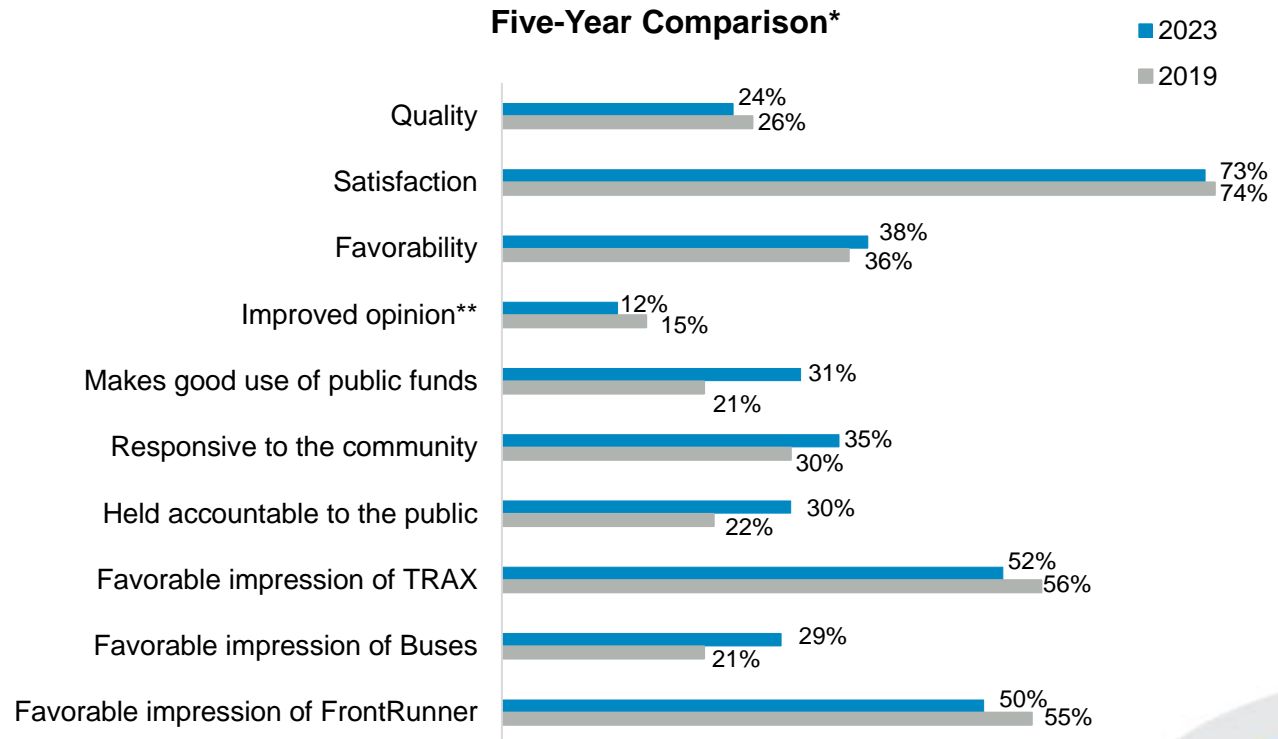


Tracking Survey: Key Findings

Favorability	Corporate Citizen	Impressions
<p data-bbox="428 354 896 518">UTA has seen a slight decrease in favorability YOY, but well over half of respondents still hold a favorable impression</p> <ul data-bbox="428 561 896 925" style="list-style-type: none"><li data-bbox="428 561 896 661">• Most are satisfied with public transportation along the Wasatch Front.<li data-bbox="428 746 896 925">• Utahns' opinions of UTA are largely staying the same – more than ¾ indicated their opinion had not changed in the last six months.	<p data-bbox="1014 354 1482 518">While UTA experienced a slight decrease in “corporate citizen” ratings YOY, they remain higher than in 2021</p> <ul data-bbox="1014 561 1482 925" style="list-style-type: none"><li data-bbox="1014 561 1482 704">• Three in ten Utahns agree UTA makes good use of public funds, is responsive to the community, and is held accountable to the public.<li data-bbox="1014 782 1482 925">• Very few organically mention corruption, scandal, or executive wages – most believe UTA is doing a fairly good job in the state.	<p data-bbox="1691 354 2140 475">Utahns' impressions of individual UTA services have held steady in previous years</p> <ul data-bbox="1691 518 2140 803" style="list-style-type: none"><li data-bbox="1691 518 2140 618">• Utahns are relatively favorable towards UTA services, and most would feel positive about riding.<li data-bbox="1691 704 2140 803">• Utahns' impressions of FrontRunner have increased the most over the past year, with TRAX close behind.



Key metrics have improved and/or held steady in the last 5 years.



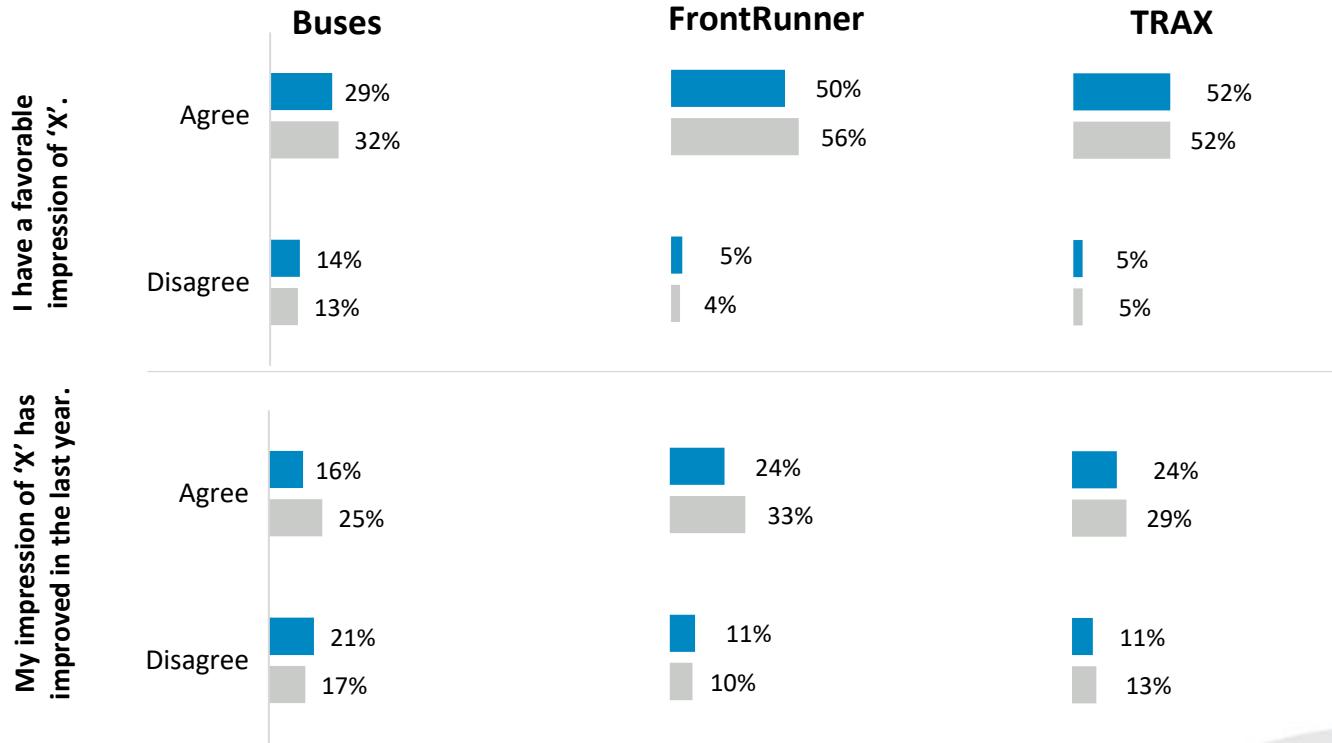
*2023: N=636; margin of error +/-3.89%; 2019: N=611, margin of error +/-4%

**Improved opinion: those who selected "improved"



Overall perceptions of UTA's services remain consistent YOY.

■ 2022
n = 600
 ■ 2023
n = 636

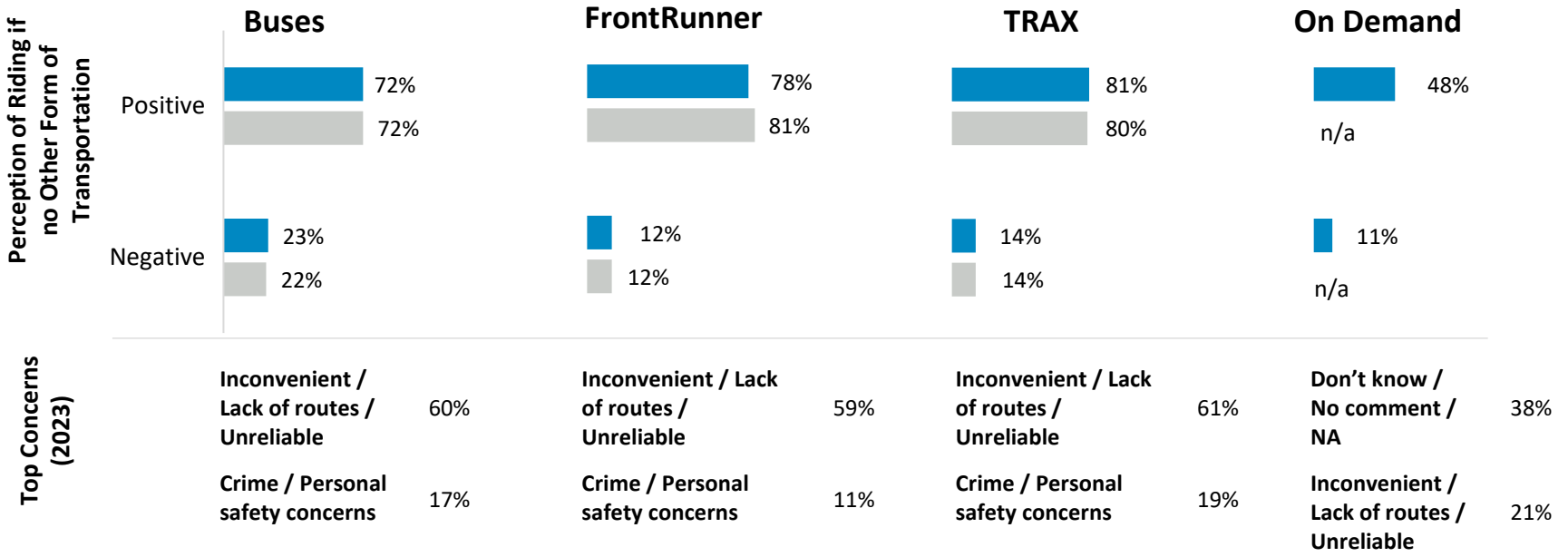


Agenda Item 10.a.



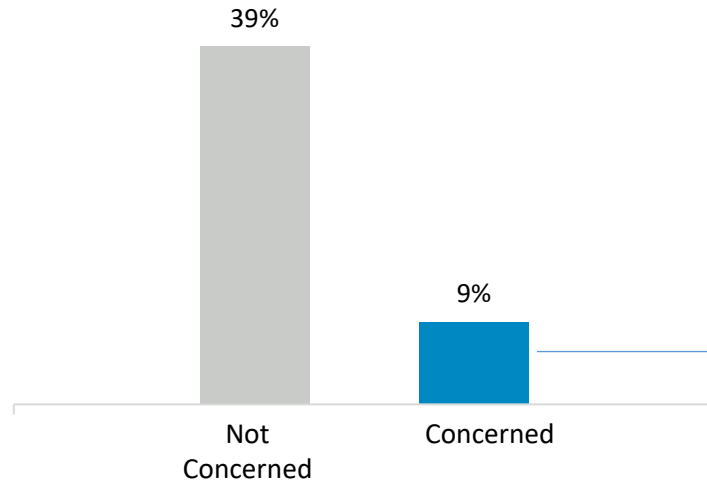
Given no other form of transportation, Utahns generally feel positive about using UTA's services.

2022 n = 600 2023 n = 636

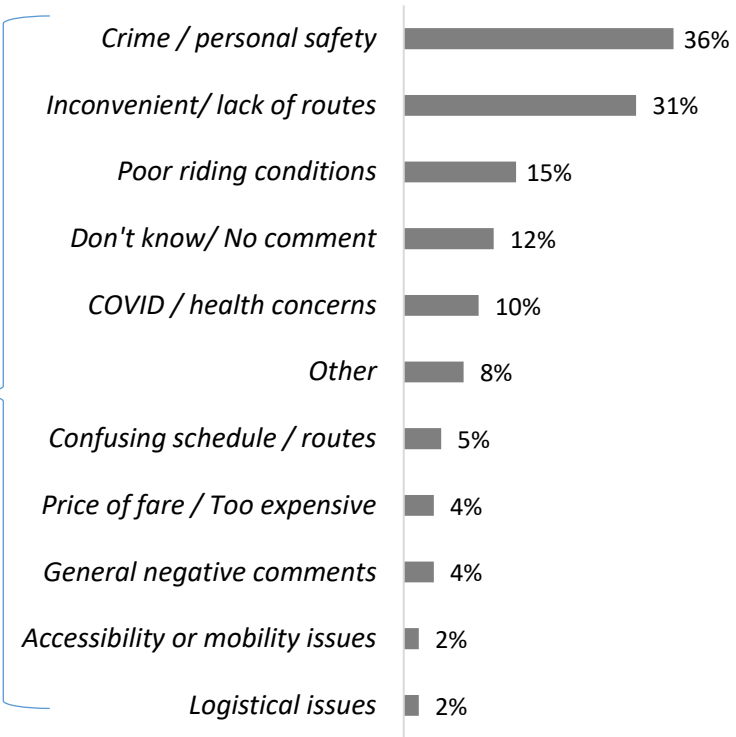


While in the minority, concerns center on crime and inconvenience.

Level of Concern with Riding UTA

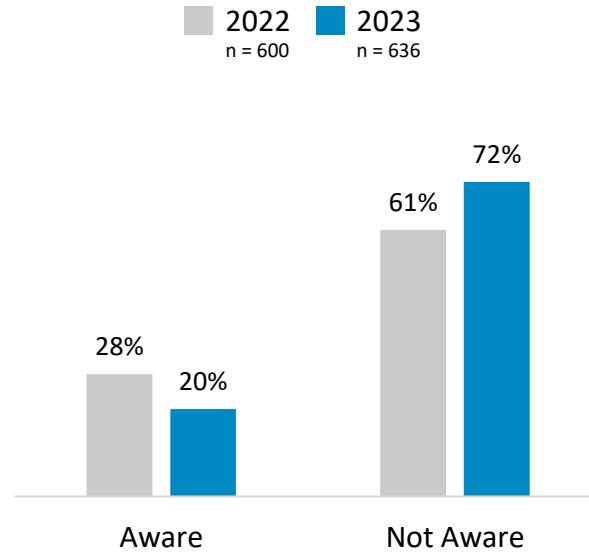


Reason for Concern

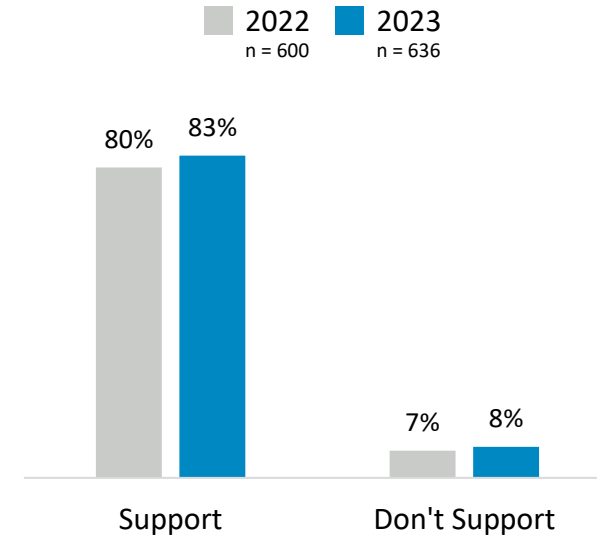


While Utahns are less aware of UTA's innovation efforts, support levels have slightly grown.

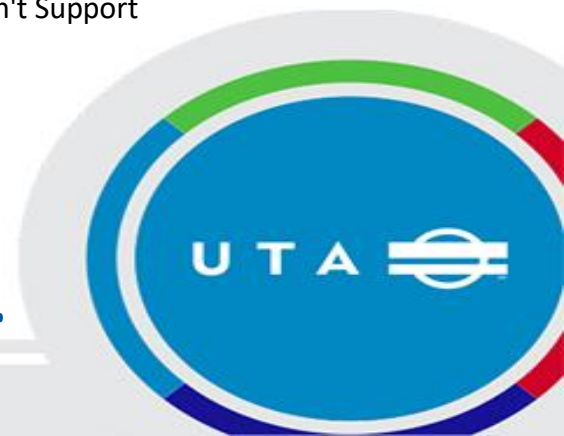
Awareness of UTA's Innovation Efforts



Support of UTA's Innovation Efforts



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Some of the primary barriers to riding involve changing work habits.

Commuting is evolving

- Only about half of Utah public transportation users travel to a work location outside the home at least 3x weekly.

Car dependency persists

- Car culture and perception of freedom, convenience and flexibility

Other frequently cited hurdles

- Perception that public transportation is potentially limiting (time, location)
- May not meet their current needs (stations, routes)
- Somewhat expensive



Our audience's riding motivators are evolving.

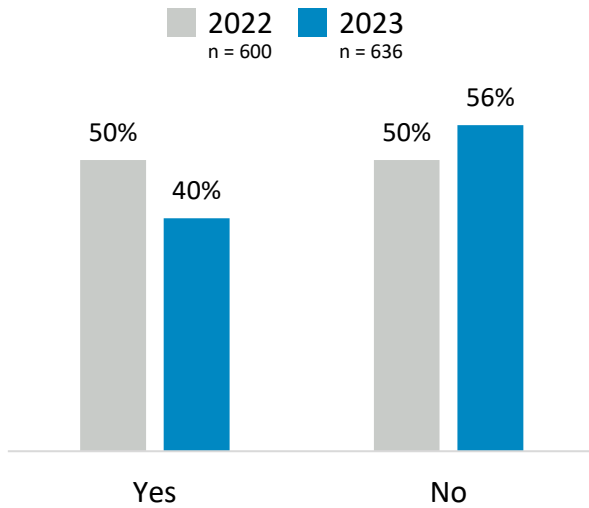
- Increased interest in taking transit downtown, for special events, riding for fun/exploration, and doing it with family or partner
 - Few envision increasing use to commute
 - Would ride more if fares were cheaper/free and stations were more convenient
- Growing interest in the broader benefits of public transportation
 - Better for the world: clean air, less pollution
 - More enjoyable experience: no need to find parking, enjoy time and have more fun with friends/family
 - Short- and long-range personal benefits: save time/money, saving wear and tear on vehicle

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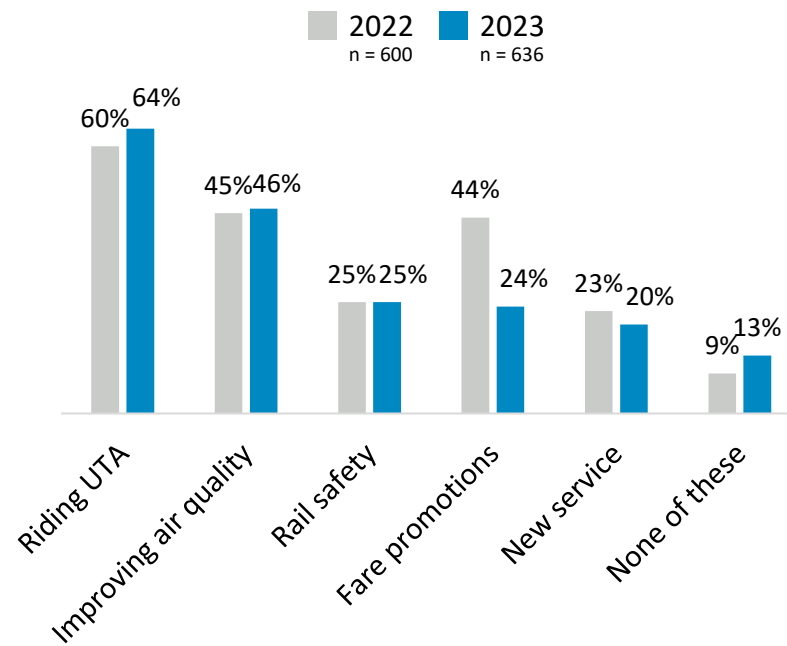


Utahns tend to recall ads about riding UTA and improving air quality.

Seen/Heard UTA Ads in Past 6 Months



Awareness of Specific Messages



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Next Steps

- Creative concepting for the 2023 "We Move You" brand campaign is currently in development, using insights and strategy gleaned from this year's research
 - Emphasis on the benefits of riding UTA
 - Reminding potential riders how much easier any trip can be
 - UTA can transform any day while also making our community a better place to be
- Review alignment of survey questionnaire to priorities measured per the 2030 Strategic Goals & Objectives

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Thank You

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