

Benchmark Survey Report



2021-2022 UTA Benchmark Survey

**Presented to UTA Board of Trustees
June 22, 2022**

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Agenda

- 01** Research Objectives
- 02** Focus Group Highlights
- 03** Survey Highlights
- 04** Messaging Strategy

Overall Research Objectives

Benchmark 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



Benchmark Survey

- **Telephone and online survey**
 - Conducted January-February 2022
- **600 surveys, margin of error +/- 4%**
 - Surveyed four counties (Davis, Salt Lake, Utah and Weber)
 - Demographics:
 - Female = 50%/Male = 49%/Non-Binary = 1%
 - Balanced mix of respondents
 - Aged 18+
 - Employment status
 - Education
 - Ethnicity



Focus Groups

Three virtual focus groups

- Conducted December 2021



1. Riders

- Have used UTA in past two years
- Mix of service use (e.g., TRAX, bus, FrontRunner)



2. Non-riders and Former/Current passholders

- Last used UTA >2 years ago
- Holds or currently held a pass



3. Non-riders and non-passholders

- Last used UTA > 2 years ago
- Has never held a pass



Research Highlights



Convenience is key

Current riders prioritize TRAX and FrontRunner over buses; they see buses as less reliable and inconvenient. Further, when evaluating the pros and cons of public transportation, cost is not a factor. Instead, riders are more concerned with whether or not the service is convenient for them.



Used for special events

UTA is often used for special events (e.g., sports, concerts). When evaluating whether to use UTA or drive, this group is driven by situational convenience. For example, if traffic and parking will be difficult, they might choose to ride UTA. Errands are left for the car.



An activity for the family.

This group primarily uses UTA for special events to avoid parking and traffic issues. Many also say their children enjoy this occasional activity – treating the ride itself as an outing. Some also worry about safety; mainly stemming from concern around “sketchy” people.



Research Highlights

Key Improvements

- During a time when most transit providers have struggled, UTA's key metrics have improved both long term (past five years) and short term (year-over-year).

Reduced Need for Public Transport

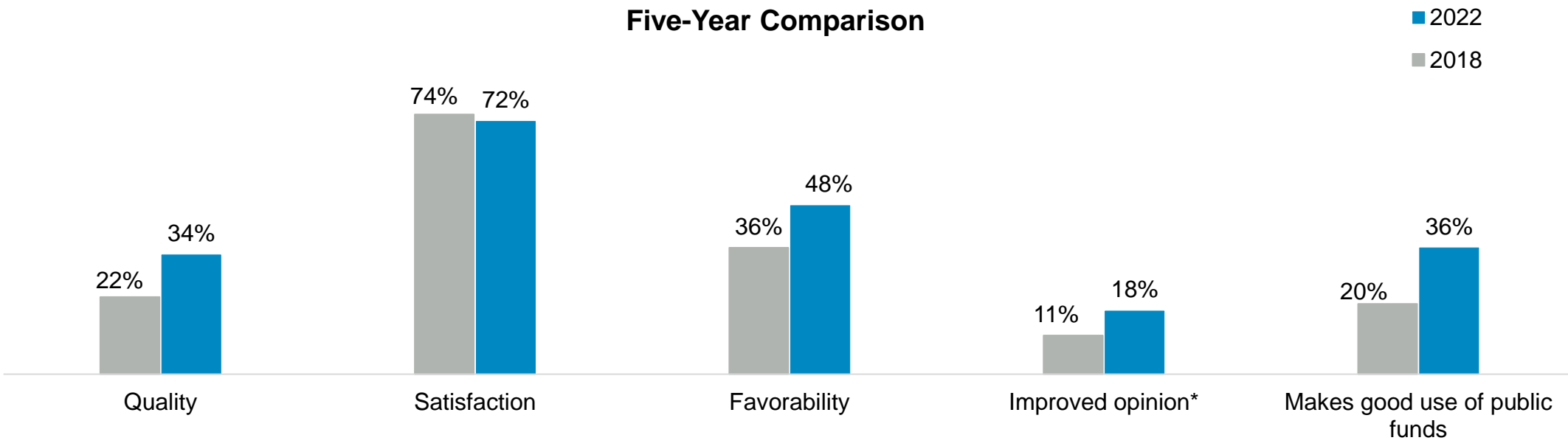
- During the pandemic, Utahns had less of a need to travel, both for work, school or entertainment.
- Preference for driving their own car is the reason most non-riders cite for not using public transit.

Barriers to Ridership

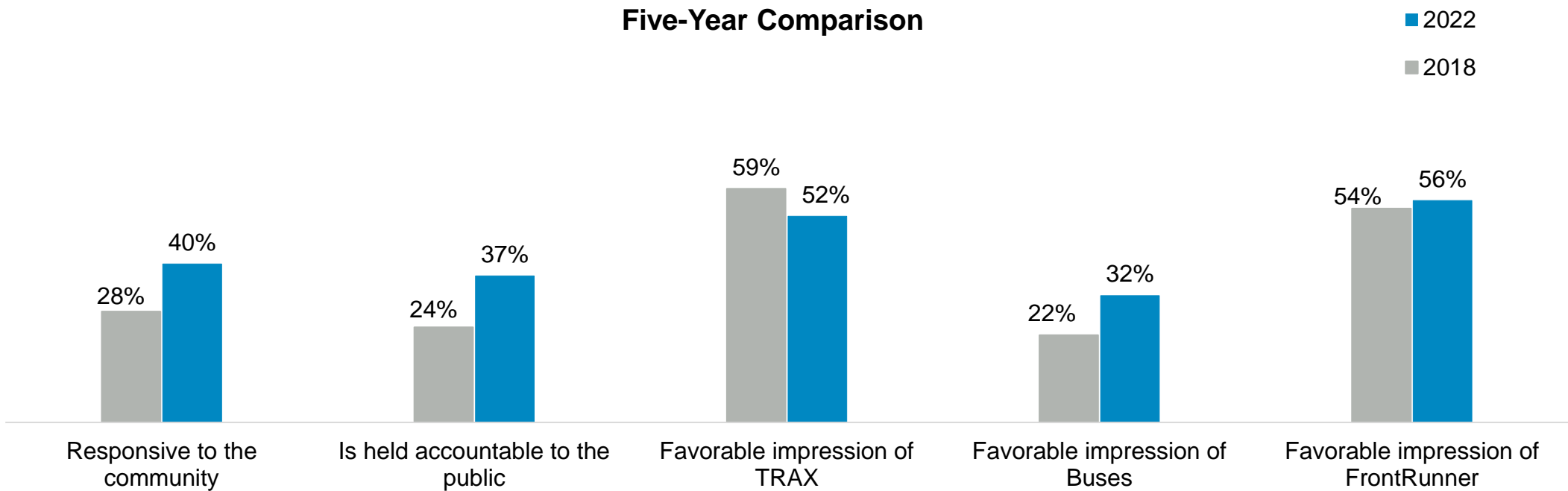
- Perception of "Inconvenient/Lack of Routes"
- Negative perceptions around cleanliness and safety



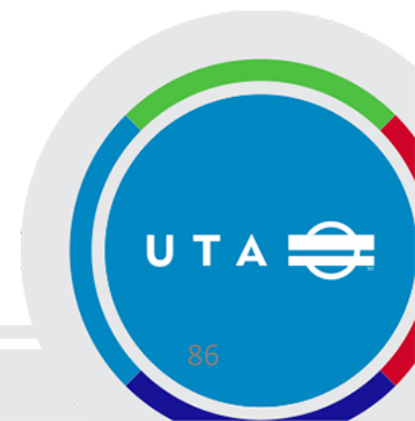
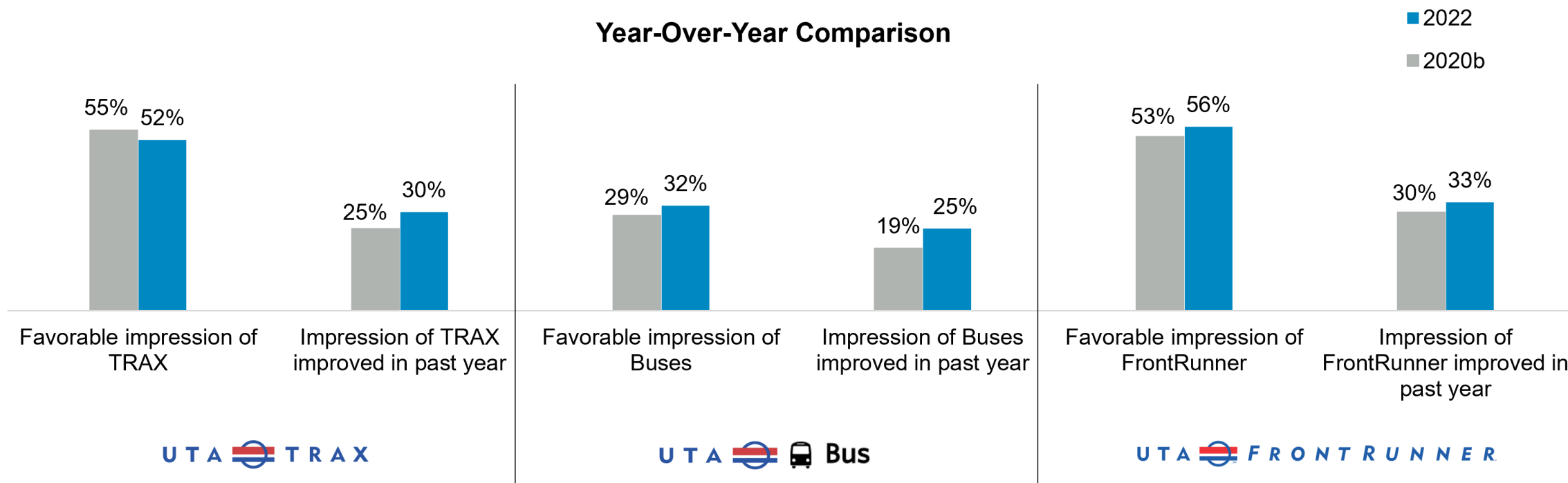
Overall, key metrics have improved over the past five years.



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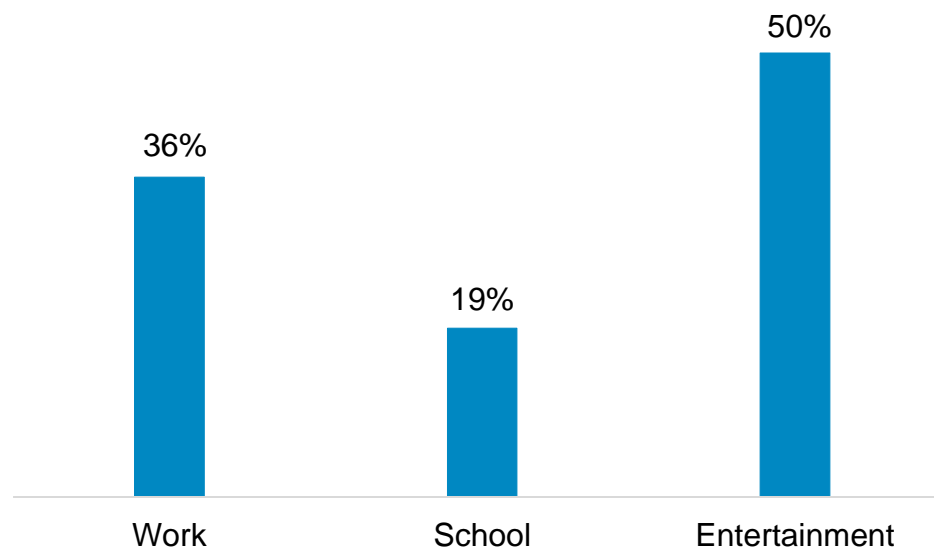


Year over year, impressions of TRAX, Bus and FrontRunner have improved.



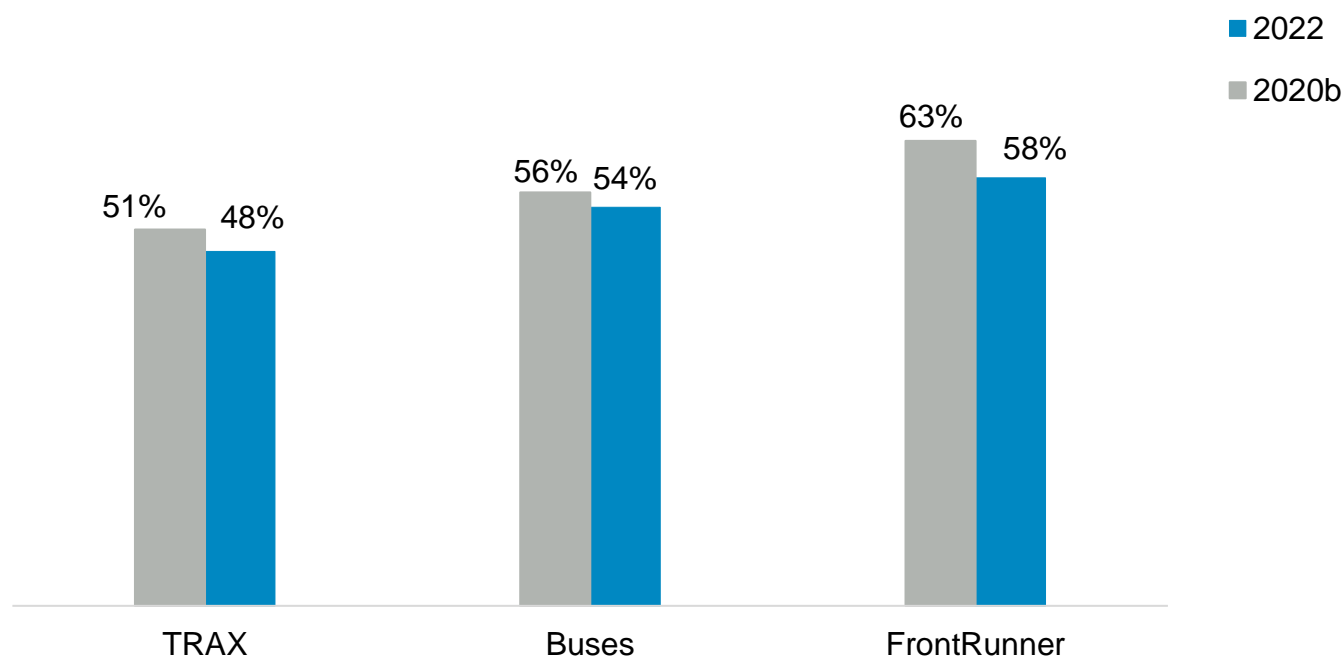
During the pandemic, many Utahns had less need to travel. About 4 in 10 say they travel less for work, and 5 in 10 say they travel less for entertainment.

Those Who Say They're Traveling "Less" for...



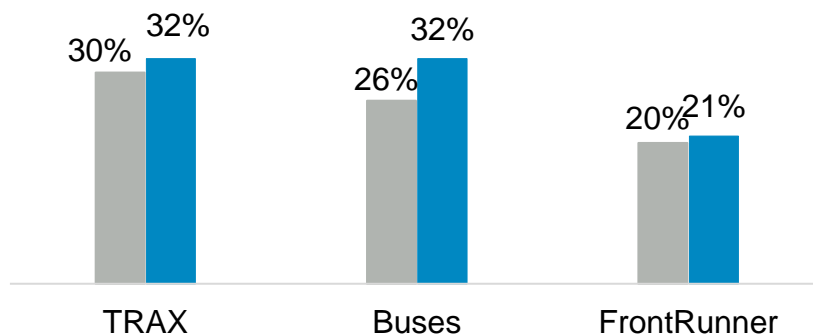
While driving their own car has decreased as a barrier, it's still the top reason non-riders cite for not using public transit.

**YOY Comparison of "Prefer Driving My Own Car"
as a Barrier to Riding**

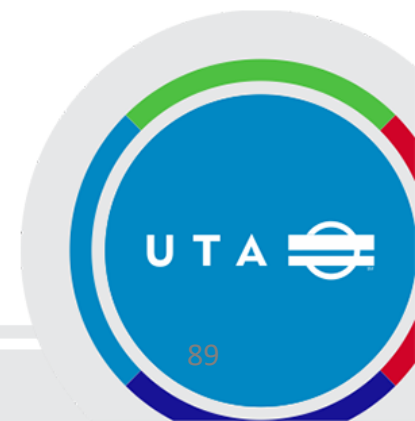
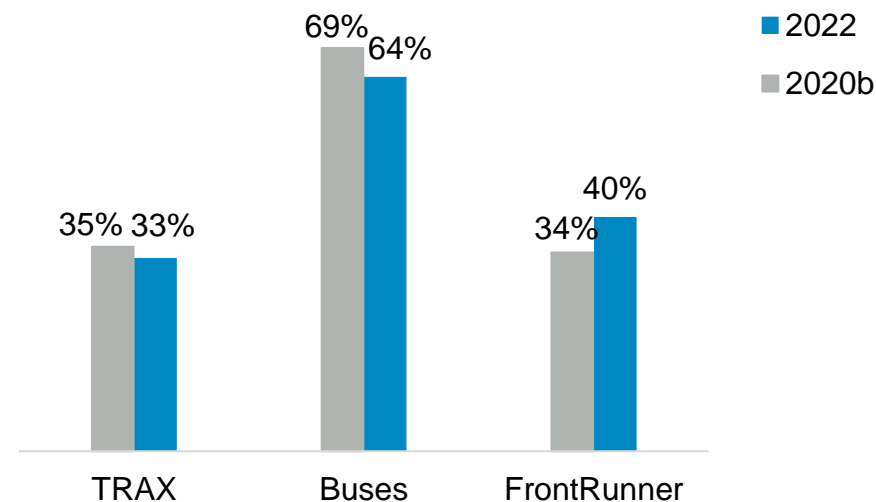


Among those who do not currently ride, “inconvenience” is a major barrier to ridership, though service is near.

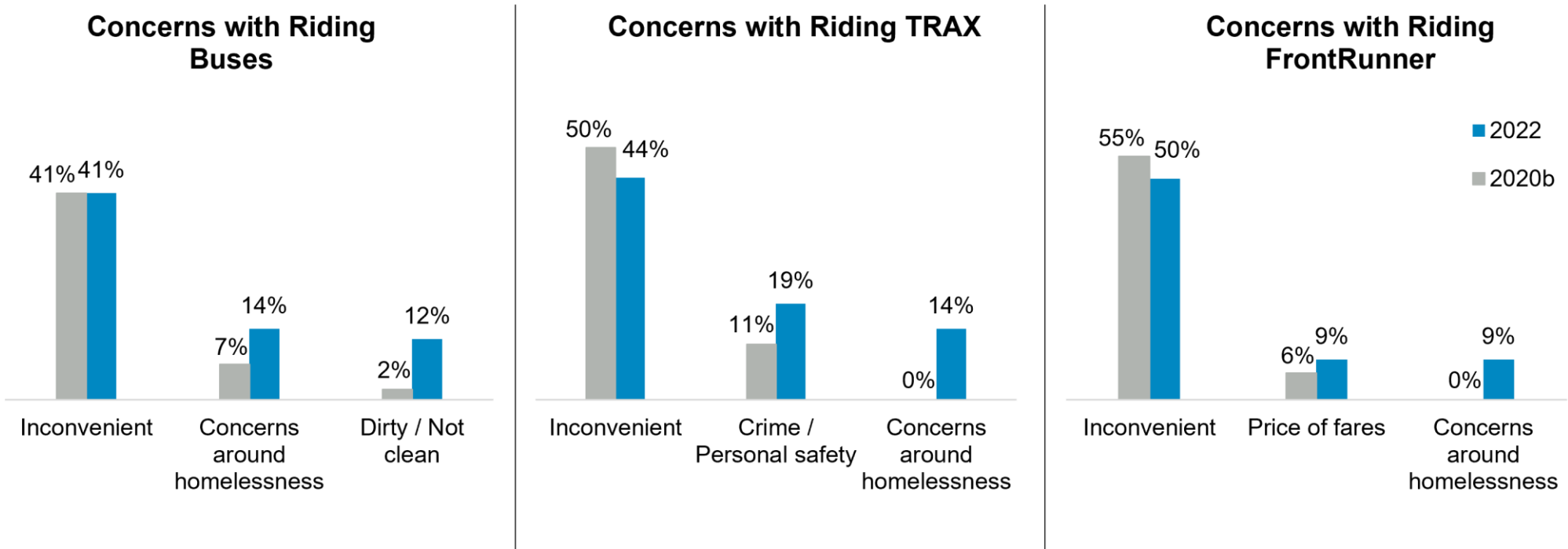
YOY Comparison of “Inconvenient” as a Barrier to Riding



YOY Comparison of “Services Near Your Work/Home”



Negative perceptions center around public transit being inconvenient, dirty, and/or unsafe.



Messaging Strategy

- **Redefine convenience** to address inconvenience perceptions
 - Include avoiding traffic and parking when traveling downtown (these are recognized motivators to ride)
- **Translate riding value** relative to driving own car
 - Potentially show a cost comparison of a fully burdened commute: include gas, wear and tear, insurance, parking, etc.
- Continue to **maintain positive perceptions** and brand attributes
- **Reinforce reasons to ride** and riding benefits
 - Connect to specific events/activities to pull in infrequent riders
 - Capture the sense of fun/enjoyment/curiosity

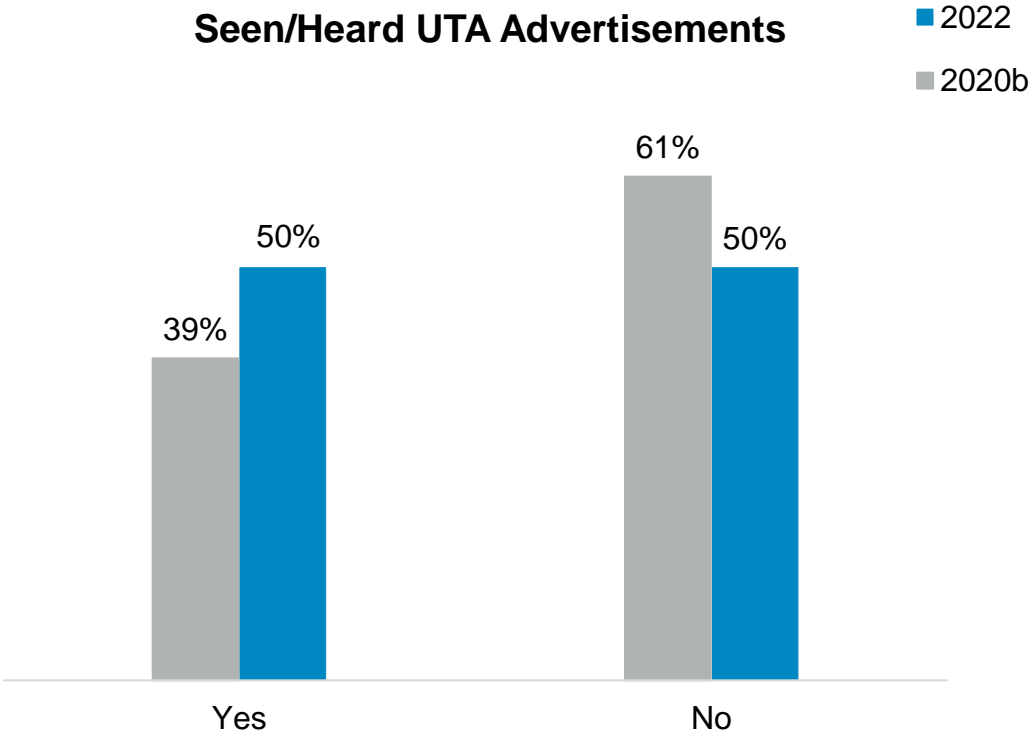


2021 “Reconnect” Campaign

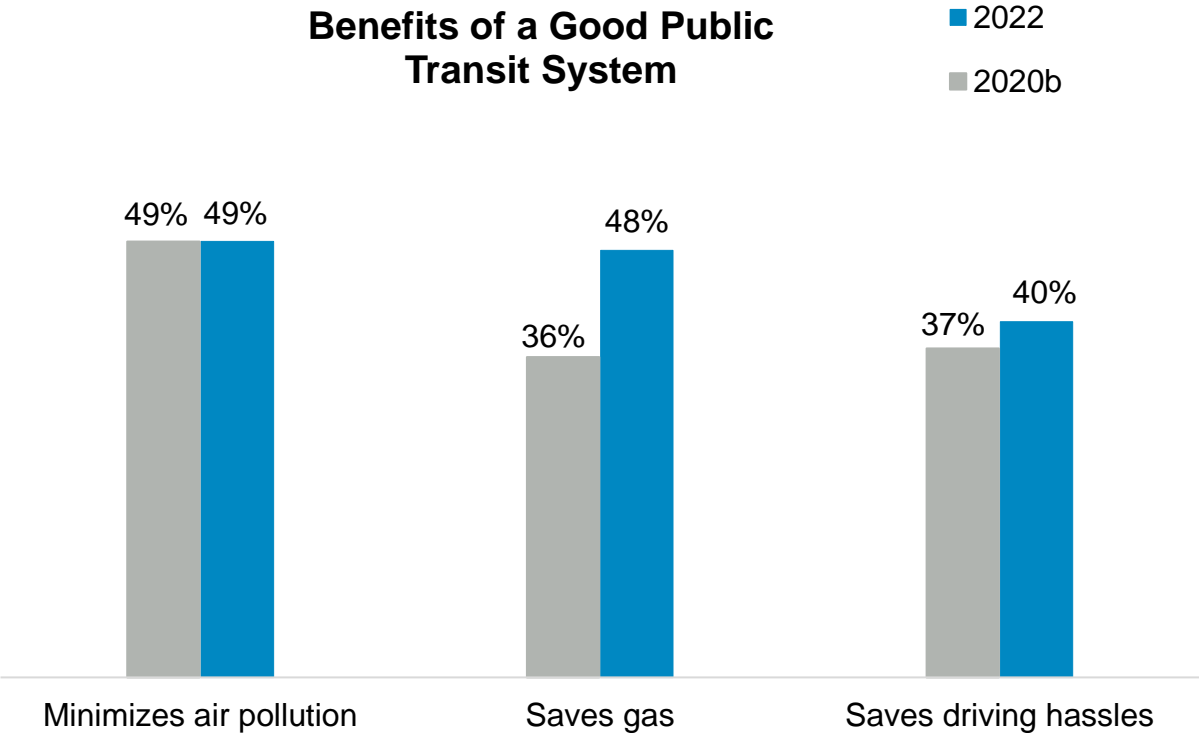
- “ReConnect” people with UTA and its continued mission to provide reliable, safe service across the Wasatch Front
- Emerging from the pandemic, re-establish UTA as an option
- Adjusted and updated tone with confidence
- Community-centric appreciation and support
- Continued safety emphasis



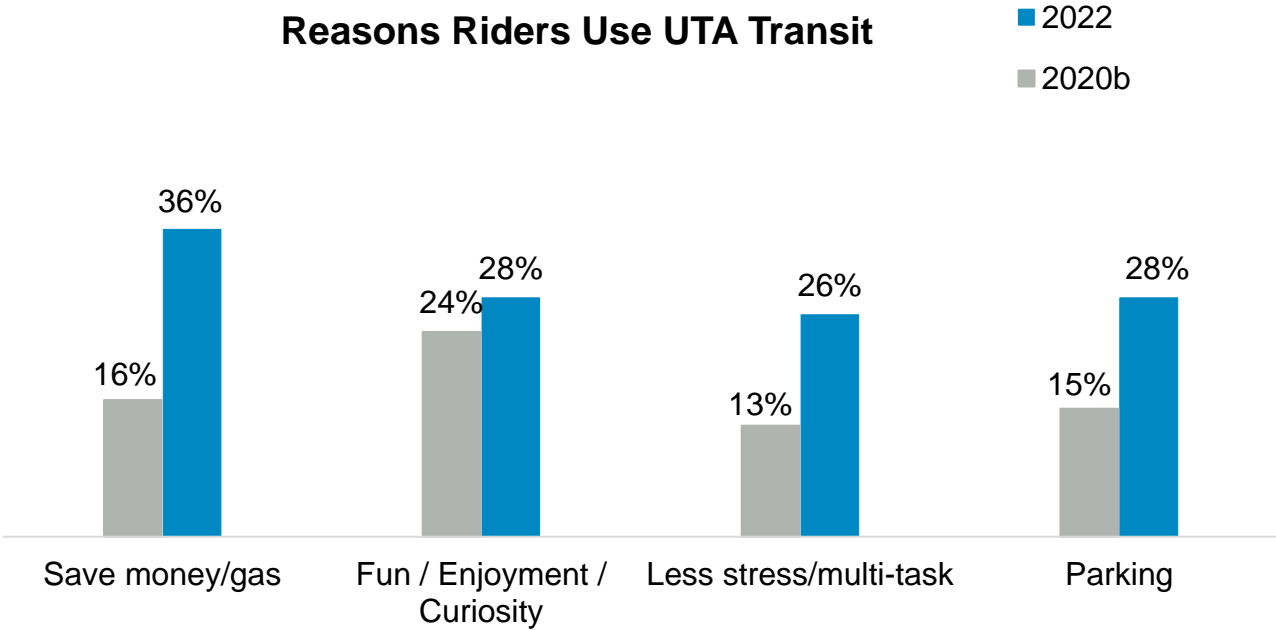
Five in 10 say they've seen and/or heard UTA advertisements – an increase of 11%



Top benefits to having a good public transit system

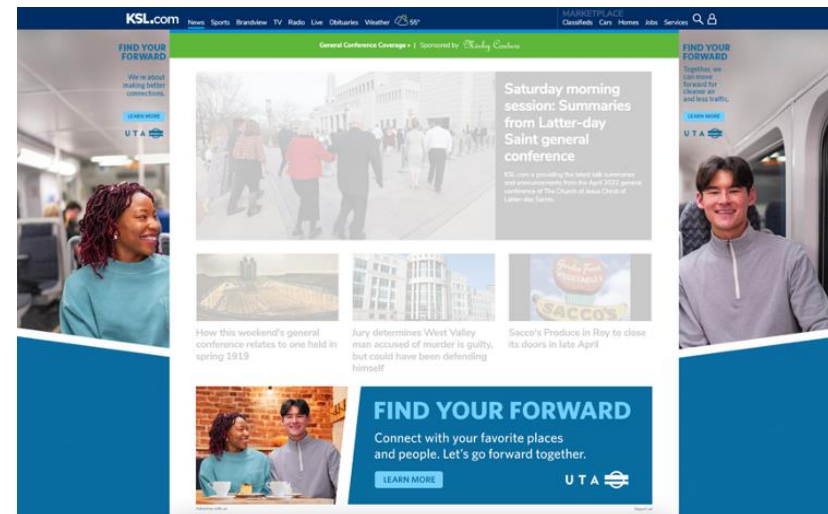
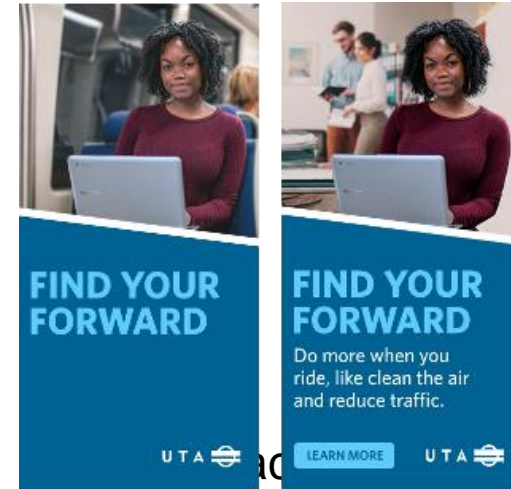


Top reasons to ride transit



“Find Your Forward” Campaign

- Launched “Find Your Forward” on April 2, 2022
- Reelevate our profile after two years of COVID-19 and fewer people having UTA top-of-mind
- Promote message of “moving forward” from the pandemic and reestablishing connections
- UTA is the answer to “find your forward” and connect with work, school, family and friends, in the community, and air quality



Thank You

