



Working Session of the  
**Service & Customer Relations Committee**

of the Board of Trustees of the Utah Transit Authority  
**Wednesday, September 13, 2017, 2:30 – 3:30 p.m.**  
Frontlines Headquarters, Golden Spike Rooms, 669 West 200 South, Salt Lake City

Members of the public are invited to attend all committee meetings, and public comment may be taken at the discretion of the committee chair. If public comment is not taken at the committee meeting, the public will be able to review and provide comment via [www.rideuta.com](http://www.rideuta.com) on all action items prior to the next full Board of Trustees meeting. If public comment is taken at the committee meeting, in order to be considerate of time and the agenda, comments will be limited to 2 minutes per individual, or 5 minutes for a spokesperson designated to represent a group.

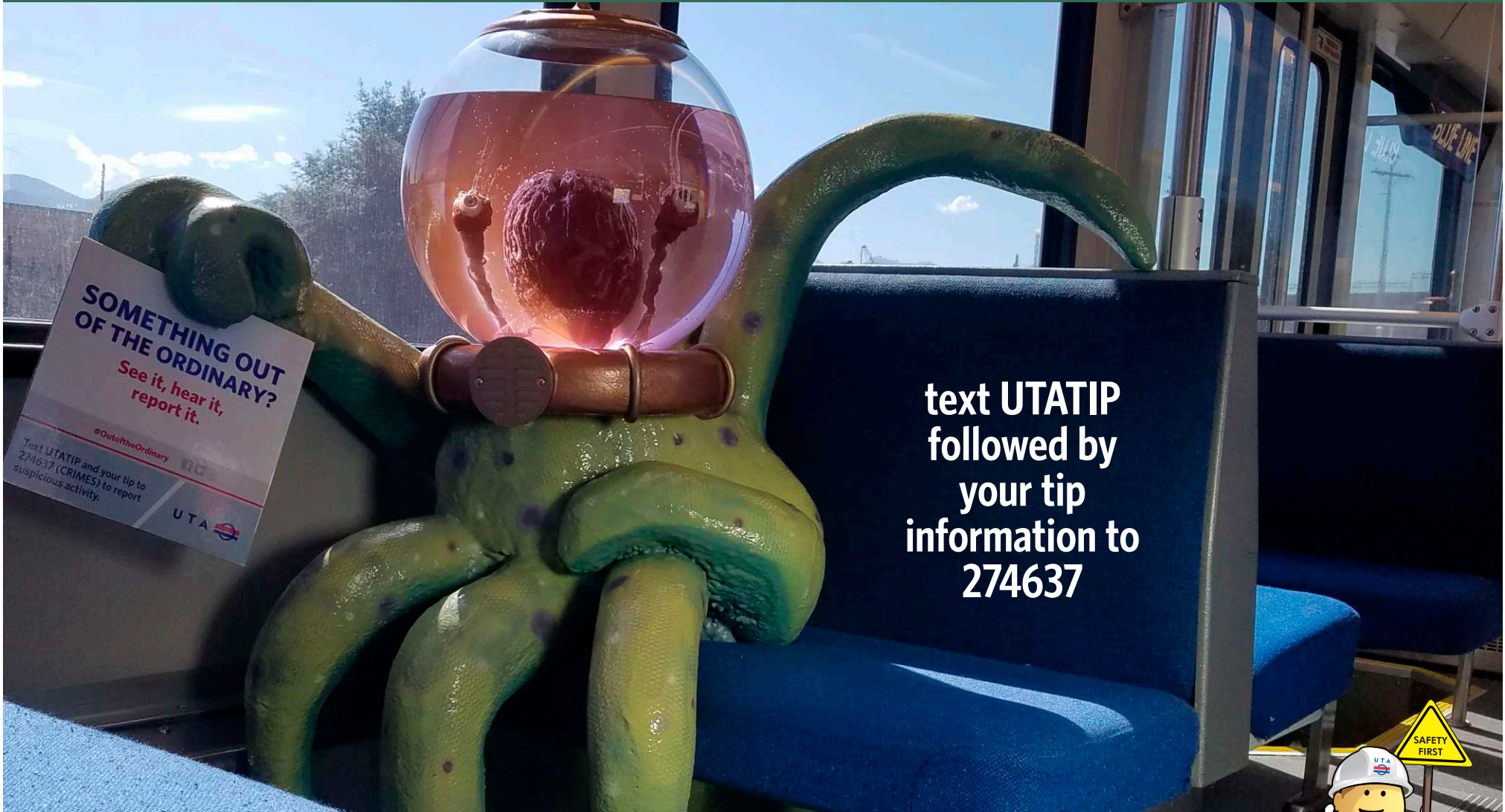
**Committee Members:** Sherrie Hall Everett, Committee Chair  
Babs De Lay Charles Henderson  
Karen Cronin

**Agenda**

- |  |                      |
|--|----------------------|
| 1. <b>Safety First Minute</b>  | Dave Goeres          |
| 2. <u><a href="#">Approval of July 12, 2017 SGRC/SCRC Meeting Report</a></u> | Sherrie Hall Everett |
| 3. <u><a href="#">Service Standards &amp; Pledge Briefing</a></u>            | Laura Hanson         |
| 4. Informational Items   | Sherrie Hall Everett |
| a. <u><a href="#">Agency Fare Structure Briefing</a></u>                     |                      |
| 5. Other Business  | Sherrie Hall Everett |
| a. Liaison, Conference & External Committee Reports                          |                      |
| b. Next Committee Meeting  |                      |
| 6. Adjourn   | Sherrie Hall Everett |

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your tip  
information to  
274637



**UTAH TRANSIT AUTHORITY BOARD OF TRUSTEES**  
**Agenda Item Coversheet**

<b>DATE:</b>	<b>September 13, 2017</b>
<b>CONTACT PERSON:</b>	<b>Sherrie Hall Everett, Chair</b>
<b>SUBJECT:</b>	<b>Minutes of the Service and Customer Relations &amp; Stakeholder/Government Relations joint committee meeting</b>
<b>BACKGROUND:</b>	<p>On July 12, 2017 a joint meeting of the Service and Customer Relations and Stakeholder/Government Relations Committees was held.</p> <p>The unapproved meeting minutes are presented for approval.</p>
<b>ALTERNATIVES:</b>	<ul style="list-style-type: none"> <li>• Approve as presented</li> <li>• Amend and approve</li> <li>• No action</li> </ul>
<b>RATIONALE FOR PREFERRED ALTERNATIVE:</b>	The minutes have been reviewed by the committee members.
<b>FINANCIAL IMPACT:</b>	N/A
<b>EXHIBITS:</b>	<ul style="list-style-type: none"> <li>• 07-12-17 SGRC&amp;SCRC Meeting-Open-unapproved</li> </ul>

**Report of the Stakeholder/Government Relations &  
Service and Customer Relations Joint Committees Meeting**

Wednesday, July 12<sup>th</sup>, 2017

10:20 a.m. – 11:50 a.m.

**SCRC Members Present**

Sherrie Hall Everett, Chair  
Karen Cronin\*

**SGRC Members Present**

Jeff Acerson  
Necia Christensen  
Karen Cronin\*  
Sherrie Hall Everett\*  
Dannie McConkie

\* *Trustee serves on both committees*

**Excused/Not in Attendance:** Greg Bell, Babs De Lay, Charles Henderson, Bret Millburn, Troy Walker

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**SCRC committee chair,** Sherrie Hall Everett welcomed everyone and called the meeting to order at 10:20 a.m.

Chair Sherrie Hall Everett yielded the floor to Dave Goeres, UTA Chief Safety, Security & Technology Officer, for a brief safety message.

**2. Approval of June 14, 2017 SGRC Meeting Report:**

A motion to approve the meeting report was made by Trustee Jeff Acerson and seconded by Trustee Dannie McConkie. The motion carried by unanimous consent

**3. Presentation/Informational Items:**

**a. Formation of Citizens' Advisory Board (CAB) – Update by Laura Hanson & Matt Sibul**

Laura Hanson, UTA Director of Planning, provided an overview of SB174 (the same legislations that created the Transportation Task Force) and established criteria for transit agencies serving a population of 200,000+ to create a Citizens' Advisory Board. Laura provided an update to the committee on the process and timeline UTA is undergoing to organize the newly formed CAB. The Citizens' Advisory Board (CAB) will be a non-governing advisory board organized to provide consumer insight and broad strategic advice to UTA staff and will consist of up to 12 members appointed by UTA's Board of Trustees. These members should be individuals who represent the diversity of UTA's transit district area and are regular users of UTA services. The advisory board provides consumer advice to influence UTA's long-term strategic priorities and short-term customer experience decision and will serve the key role in solicitation of public input and community engagement of public transit initiatives throughout the service area.

It was determined that Trustees Acerson and Christensen would work with the UTA staff to finalize the CAB nomination process in August in order to begin solicitation of nominees. The SCRC committee will review these nominations early this fall and subsequently submit those to the Board for approval. With the formation of the CAB, the Community Transportation Advisory Committee (CTAC) will be disbanded.

**4. Approval of May 11, 2017 SCRC Meeting Report:**

A motion to approve the meeting report was made by Trustee Dannie McConkie and seconded by Trustee Necia Christensen. The motion carried by unanimous consent.

## **5. Presentation/Informational Items:**

### **a. Customer & Public Feedback Report**

Nichol Bourdeaux, VP of External Affairs, provided the Committee with a report summarizing the Customer & Public Feedback for the agency over the past year (attached.) The purpose of this report was to help the Committee understand the feedback being received from our customers and to identify the areas of growth and opportunity. The report contained statistics and data concerning the number of communications UTA receives annually (through the call center, emails, UTA website, mail and social media) as well as the solutions and trends for improvement and initiatives to increase the customer feedback loop. New tools and technologies which are providing increased access for customers to “self-serve” and reduce call volumes were also introduced.

### **b. Communications/Public Relations Update & Discussion**

Andrea Packer, Communications Director, provided an overview of some additional communications and public relations tools which are improving the public’s access to information and services, and ultimately the consumer experience. Website development and Partnerships were two key topics explained in further detail. In addition, social media is looking at long-term goals and in revamping UTA’s communications approach to support public trust and board forums. Some of these goals include: implement interactive and responsive tools to support public engagement, implementing content that is relevant and attractive to a wide variety of audiences, ensuring social media is a place to obtain timely information regarding UTA operations.

Other topics reviewed included: UTA website redesign, customer tools, advertising strategy, and other external partnerships (UCair, Chambers, bicycle coalitions and air quality organizations, schools, etc.)

## **6. Closed Session:**

The Committees did not go into Closed Session

## **7. Action Taken Regarding Matters Discussed in Closed Session:**

No action(s) were required

## **8. Liaison, Conference & External Committee Reports:**

No reports were provided

## **9. Input & Date for the Next Committee Meeting:**

No additional items were added to the anticipated agenda.

## **10. Other Business:**

No other business was provided


The meeting adjourned at 11:50 a.m.

Report Transcribed by: Eileen Billings, Senior Office Specialist

External Affairs

E-mail: [ebillings@rideuta.com](mailto:ebillings@rideuta.com)






# Update on Customer Feedback


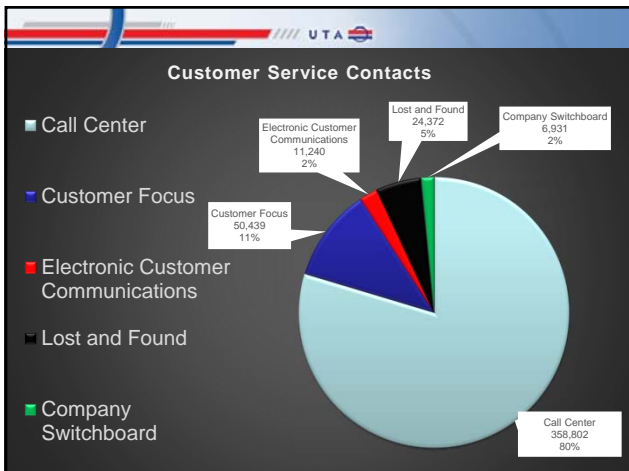
*Stakeholder Relations Committee*

*Presented by Nichol Bourdeaux,  
VP of External Affairs and Constituent Services  
July 12, 2017*



## Customer Service Mission Statement

- Customer Service department is committed to creating positive interactions with our customers in order to provide them with accurate information, helpful hints, and empathy to their situations and concerns.


## Customer Service Function

- 46 Employees (full and part time)
- Customer Focus Team
- Call Center Team
- Customer Relations Team
- Electronic Customer Communications Team

Quality in a service or product is not what you put into it. It is what the customer gets out of it

*Peter Drucker*




UTA

## Customer Call Center

2015	2016	YTD
432,705	442,518	150,128

- 2016 volumes reflect 17% reduction over previous year

2016 call abandoned rate: 8%      YTD call abandoned rate: 4%

Goal is 3% to 6%

UTA

## New Tools & Technologies

Call volumes reduced due to additional tools

- Automated "next bus" phone system
  - 248,538 English
  - 13,360 Spanish
- RideTime Text– 1,388,376 in 2016
  - SMS texting of next bus departures
  - Signs being posted at all bus stops
  - Find my bus app locators
- Social Media
  - Electronic Customer Communications Specialists
  - Provide service info via Twitter 5 a.m. – 8 p.m.




Text UTA-UTA (882882) with Stop ID

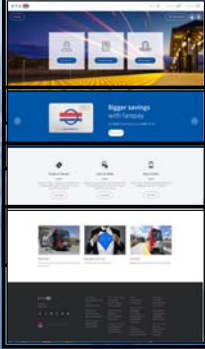
for bus departure times.

UTA

## Website Improvements



Old Version



NEW Version

UTA

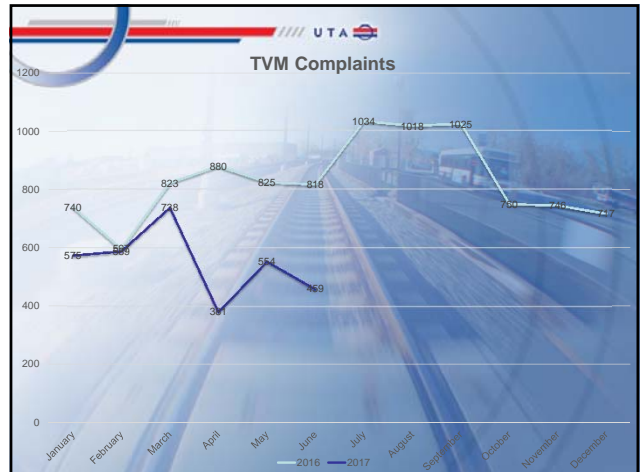
## Customer Feedback Calls

2015	2016	YTD
55,802	50,439	22,712

- 2016 volumes reflect 9% reduction over previous year
- 35,249 Comments Filed for 2016
  - Top 5 categories
    - Repairs
    - Customer Interactions
    - FAREPAY Card Balance
    - Unused Fare Media
    - Pass By

**Customer Comments**

2015		2016		YTD	
TVM	18%	TVM	32%	TVM	24%
FAREPAY - card balance	8%	Negative Customer Interactions	7%	FAREPAY - card balance	8%
Negative Customer Interactions	8%	Fares- Unused FAREPAY	6%	Negative Customer Interaction	7%
<b>Commendation</b>	7%	Fares- Unused Pass	5%	Fares- Unused Pass	6%
Pass By	6%	Pass By	5%	<b>Commendation</b>	6%
Fares- Unused FAREPAY	5%	<b>Commendation</b>	4%	Pass By	5%



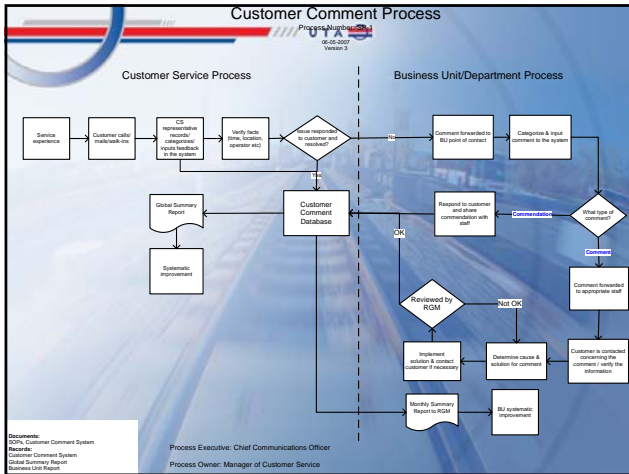
- Customer Comment System**
- Receive and log customer feedback, experience or observation about UTA services and employees via phone calls, email, website, mail, social media, etc.
  - Understanding customer needs and experience, and how we can improve.
  - Track and Trend for improvement
  - Reports ( Improved in 2017)

**Responding to the Customer**

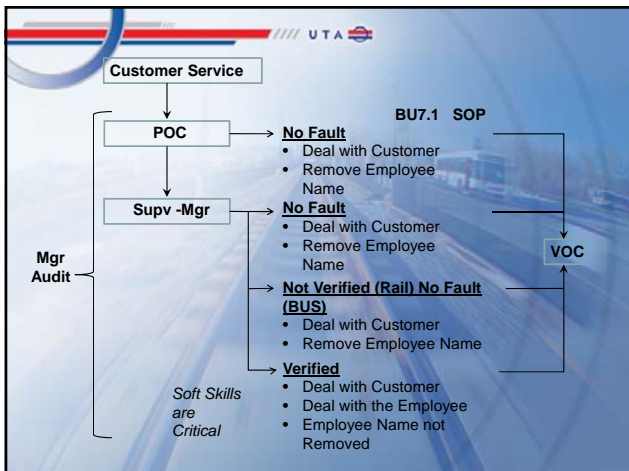
*Customer Service tries to resolve the customer's concerns or answer questions. If additional investigation is needed, the comment is sent to the responsible business unit or department to review, pull video, and respond to the customer.*

- Maximum of 24 hour for processing
- Seven (7) days investigation and handle





- ## Continuous Improvement
- New Business Unit operations processes
    - UTAway with employee interactions
  - Point of Contacts for each Business Unit
    - True North for process improvement for roles and responsibilities
  - Customer Focus Teams in Business Units
    - Customer Focus for solutions to customer communication and education



Questions?

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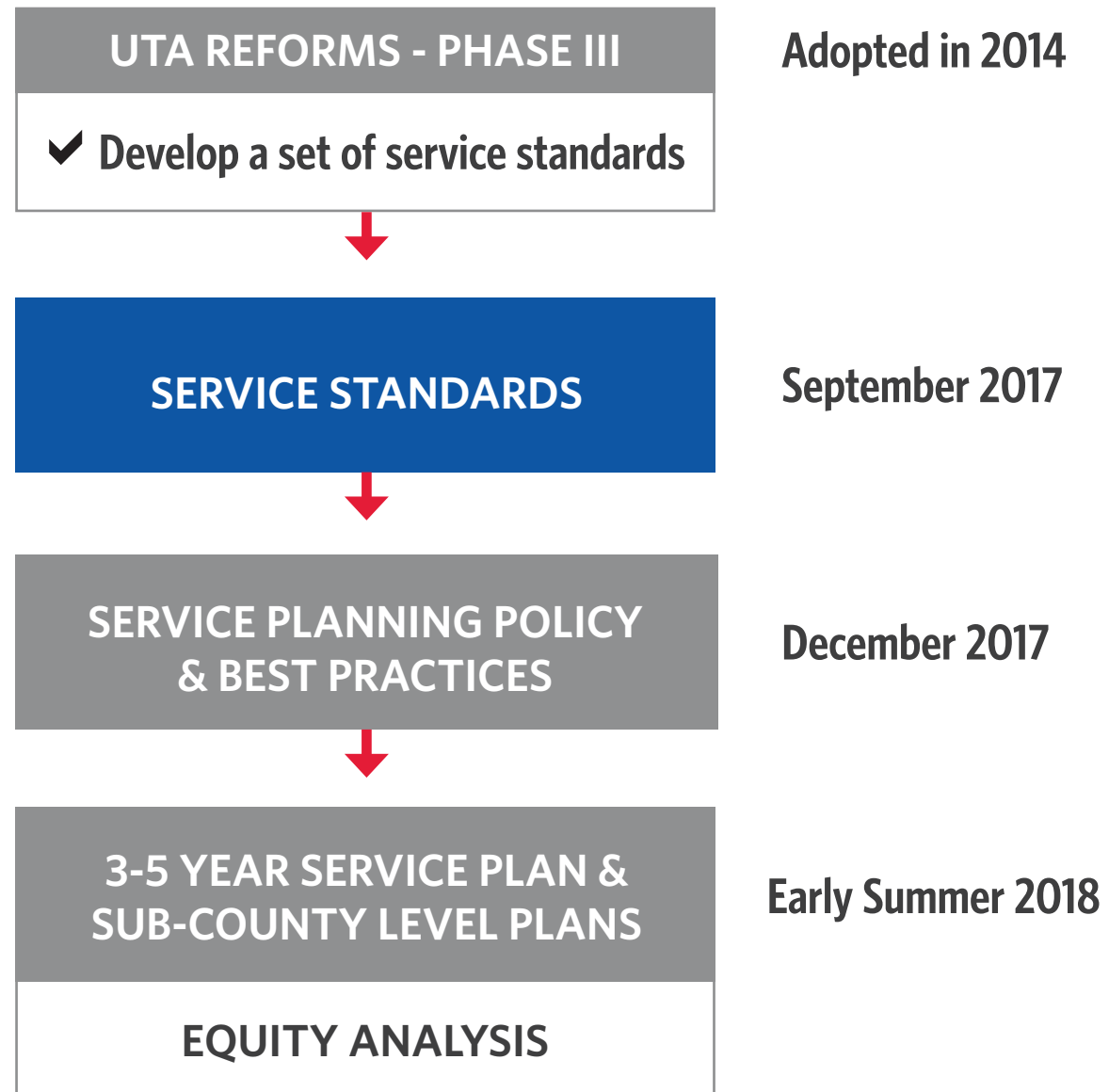
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**UTAH TRANSIT AUTHORITY BOARD OF TRUSTEES  
Information Paper Coversheet**

<b>DATE:</b>	<b>September 13, 2017</b>
<b>TITLE:</b>	<b>Service Standards &amp; Pledge Briefing</b>
<b>UTA EXECUTIVE/RESPONSIBLE STAFF MEMBER:</b>	<b>Laura Hanson</b>
<b>SUBJECT:</b>	The Service Standards and Pledge outlines UTA's commitment to providing service to its customers.
<b>BACKGROUND:</b>	<p>The Utah Transit Authority is in the process of developing a set of tools to help guide future transit service planning. The first element of this suite of tools is an external facing pledge to UTA customers that outlines UTA's commitment to providing high quality service for the Wasatch Front region.</p> <p>Paired with the Pledge are a set of standards organized by UTA's strategic focus areas (True Norths): Service, People, Environment, Community, and Stewardship. These standards are measureable metrics that UTA and its customers can use to track the outcomes of UTA efforts, and evaluate them against agency goals.</p> <p>Forthcoming service planning tools will include:</p> <ol style="list-style-type: none"> <li>1) A Service Planning Policy that is based on national best practices and local data to help guide local service planning decisions, and</li> <li>2) A 3-5 Year Service Plan that outlines an action plan for applying the Service Planning Policy guidance to specific sub-areas.</li> </ol>
<b>ALTERNATIVES:</b>	None presented
<b>FINANCIAL IMPACT:</b>	To be determined
<b>EXHIBITS:</b>	<ul style="list-style-type: none"> <li>• Service Standards.pdf</li> </ul>

# UTA SERVICE STANDARDS





## **OUR COMMITMENT**

*You can trust the Utah Transit Authority to provide the right service in the right place through an innovative system of service types and modes.*

*Our goal is to take you where and when you want to go, and give you the freedom to change your plans.*

*UTA will respect you as an individual and customer, and we will continually work to provide service that is a good use of both your time and your money.*



## SERVICE

*We provide dependable, reliable, and frequent transit service to meet the needs of customers.*

**Miles per  
Bus Service  
Interruption**



UTA seeks to minimize the amount of time customer trips are interrupted by bus mechanical issues.

This metric measures the distance in miles between trip interruptions as compared to UTA's annual goal.

**Number of  
Avoidable  
Accidents**



Accidents are typically unavoidable, but sometimes accidents happen despite extensive operator training.

UTA measures the number of accidents that could have been avoided per 100,000 miles.

**Percent of  
On Time  
Performance**



This is a measurement of how frequently UTA vehicles reach designated passenger stops on time.

UTA considers anything within a window of zero minutes early to 4:59 minutes late to be an on time arrival.

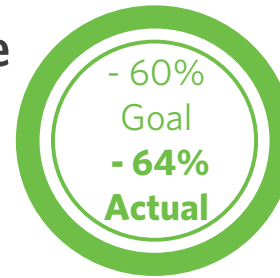
# PEOPLE

*We provide a customer experience that is easy to understand, comfortable, efficient and safe.*

Percent of  
Issues  
Resolved  
in One Call



Percent Change  
in Top Issue:  
TVM Repairs  
2016-2017



Average Time  
to Resolve  
Complaint



UTA works to address customers issues as effectively and quickly as possible.

This metric measures the number of customer requests that are resolved after just one call to UTA's Customer Service team.

Each year UTA identifies the most frequent concern identified in customer service calls. The top issue in 2016 was ticket vending machine repair.

This metric measures the percent change in the previous year's top complaint.

UTA is committed to resolving all customer complaints as thoroughly and effectively as possible.

This metric measures the number of days between initial receipt of the customer complaint and closure of the issue report.

# ENVIRONMENT

*We are leaders in improving the health of our region.*

**Pounds of  
Seasonal Air  
Pollutants  
Prevented**



**Total Building  
Energy  
Use in  
decatherms**



**Percent of  
Low Emission  
Vehicles in Fleet**



UTA takes its role in improving the air quality of our region seriously.

This metric measures the amount of air pollution prevented by people choosing to ride transit rather than driving cars, as compared to the previous year.

UTA works to minimize the amount of energy it uses at its facilities through internal conservation practices.

This measures the energy use in UTA buildings in DTH with the goal of meeting the previous year's use or better.

Low emission vehicles help minimize the amount of pollutants entering our air.

This metric measures the percent of UTA's fleet that are low emission vehicles against an annual goal. These include those fueled by natural gas, electricity, and clean diesel.

# COMMUNITY

*We involve the communities we serve to design service that is inclusive and increases access to opportunity.*

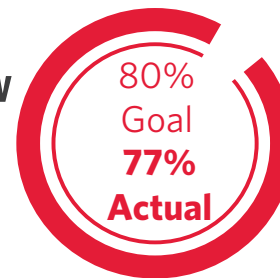
Percent of High-Use Bus Stops With Paved Surface



Utah's seasonal weather changes can result in cold, muddy conditions.

UTA is working to ensure that all high-use bus stops include a paved surface to improve the customer experience throughout the entire year.

Percent of Minority/Low Income Populations with Access



UTA is proud of its role in connecting and serving historically disadvantaged communities. This metric aggregates the percentage of target populations with access to UTA's service.

76%	Minority
78%	Low Income

Number of Implemented First/Last Mile Improvements



The first and last miles of any trip are a challenge to transit providers. UTA is partnering with local governments to bridge this service gap.

This metric tracks implementation of first/last mile projects per year against an annual goal.

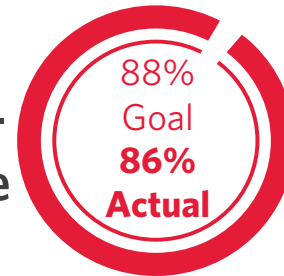
# STEWARDSHIP

*We are responsible with the resources entrusted to us by the public.*

Bond  
Rating



State of Good  
Repair Rating -  
Active Revenue  
Vehicles



Efficiency as  
compared to  
peer agencies



A bond rating is a score assigned by independent agencies to measure the credit quality of a particular bond and the financial strength of the entity issuing the bond.

UTA works to maintain a bond rating of AA or better.

UTA works to maintain its vehicles and facilities in a State of Good Repair.

This is a measurement of UTA's active revenue fleet vehicles that fall under the age threshold for replacement, including buses, rail vehicles, paratransit and vanpool vehicles.

UTA strives to be as efficient as possible with its financial resources, and has a goal of being in the 25% of most efficient transit agencies.

This metric compares UTA's efficiency against comparable agencies in terms of cost per mile.



**UTAH TRANSIT AUTHORITY BOARD OF TRUSTEES  
Information Paper Coversheet**

<b>DATE:</b>	<b>September 13, 2017</b>
<b>TITLE:</b>	<b>Information Paper on UTA Fare System</b>
<b>UTA EXECUTIVE/RESPONSIBLE STAFF MEMBER:</b>	<b>Nichol Bourdeaux/Dave Schroeder</b>
<b>SUBJECT:</b>	<b>Background and Insight into UTA Fare System</b>
<b>BACKGROUND:</b>	<p>UTA staff are providing an information paper on the currently ongoing Fares Project, which is investigating UTA's Fare System and potential options for improvement.</p> <p>This paper provides an overview of the investigation, timelines for the project, and insight into the challenges and trade-offs involved in a Fare System.</p>
<b>ALTERNATIVES:</b>	None presented
<b>FINANCIAL IMPACT:</b>	To be determined
<b>EXHIBITS:</b>	<ul style="list-style-type: none"><li>• Executive Summary Fares Final DRAFT v4 20170831.pdf</li></ul>

# The Fares Project: Board Summary Update

September 2017

The following synopsis is intended to provide UTA’s Board of Directors (Board) with an update on the 2017-18 UTA Fares Project (Project). The Project was initiated in early 2017 in order to resolve a number of issues with UTA’s fare collection system.

UTA has studied changes to the fare system and pricing in the past, most recently with Distance-Based Fare. However, the agency has not recently completed a thorough examination of the various components and opportunities associated with fare collection. Shortly after Jerry Benson became the CEO in fall 2016, he vowed to address customer concerns related to the fare system<sup>1</sup> and to improve the customer experience as it relates to fare collection through a comprehensive lens.

The primary intent of the Project is to examine ways to simplify the fares system in order to increase ease of use and understanding among UTA riders and potential riders. In addition, the Project will establish a recommendation for a comprehensive policy and strategy for UTA fare collection going forward.

## Goals

The goals of the Project have been informed by the UTA Board and include the following:

- *Easy to use* - the ability to pay fare with a minimum of effort
- *Understandable* – the ability to understand the fare regardless of mode(s) used or distance traveled
- *Customer Desirability* – the attractiveness of the fare to the UTA rider and potential rider
- *Reflects Cost of Service* – the fare is representative of the comparative economic worth of the service
- *Promotes Ridership* – enables and attracts people to use transit
- *Affordable and Accessible*– fare products are available and accessible to persons at a transportation disadvantage, such as persons with low income
- *Maintains sustainable revenue stream* – ensures predictable revenue source
- *Compliance with Legal Obligations*– proactively integrate processes and procedures set by federal and state governing authorities (for example: Title VI)
- *Responsible Return on Investment* – consider fully-allocated investments in fare collection equipment
- *Positions UTA for the Future* – Changes and upgrades to the fare system position UTA to adapt to changing technology

## Process

The Project timeline, from initiation to implementation is anticipated to last a total of twenty-three (23) months; from March 2017 through January 2019. Staff will spend a total of approximately seventeen (17) months, March 2017 through June 2018 refining the fare structure and agency fare policy. Following Board approval of recommendations from the Project in June 2018, staff will spend six (6) months planning for the implementation in January 2019.

The Project will be broken into six (6) major stages including two (2) phases of public engagement. These stages of the Project are as follows:

**Stage 1** (March 2017 – July 2017): Investigate the fundamental issues of fare collection at UTA

**Stage 2** (August 2017 – December 2017):  
 Develop the range of viable System Options  
 Initiate **Phase 1 Public Engagement Plan**  
 Refine to those System Options that are viable

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<sup>1</sup> In 2016, three of the top five Customer Comments were Fare-Related. These are: issues with ticket vending machines (TVM), FAREPAY overcharges due to customer error, and FAREPAY over charges due to hardware or software issues.

Board consideration of approval to proceed with Stage 3

**Stage 3** (January 2018 – May 2018):

- Assign fare pricing to the recommended System Options
- Initiate **Phase 2 Public Engagement Plan**

**Stage 4** (June 2018): Presentation of Fare Policy and a recommendation for Preferred System Option to the UTA Board for consideration of adoption

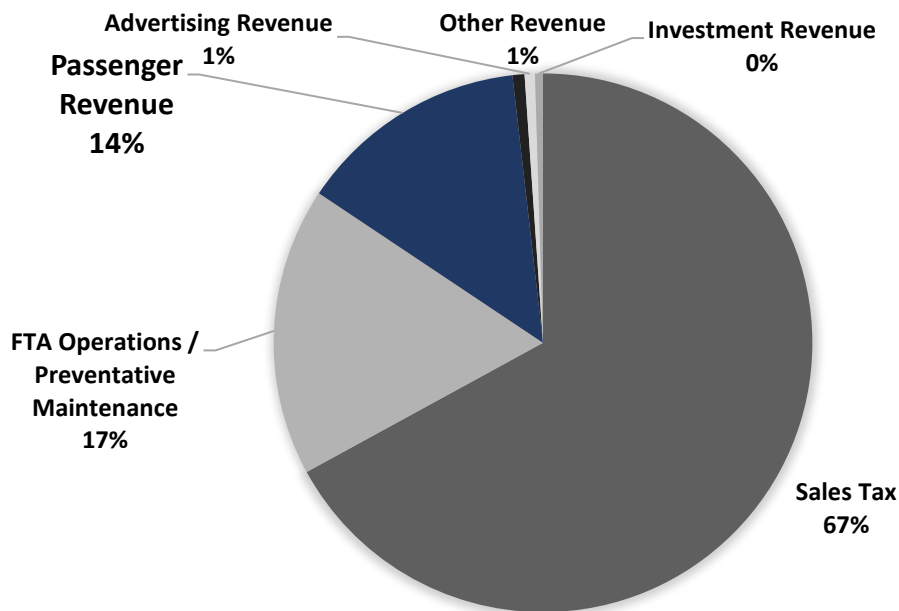
**Stage 5** (July 2018-December 2018): If a Preferred System Option is adopted by the Board, develop Implementation Plan

**Stage 6** (January 2019): Implementation of Preferred System Option (conditional to Board adoption of Preferred System Option)

At the end of Stage 4, the Project will result in recommendations to UTA’s Board on the adoption of a comprehensive Fare Policy and a Preferred Fare System Option. The Board will ultimately approve or reject any recommendations. As of the date of this memo, Stage 1 has been completed and Stage 2 has been initiated.

### Current System

In 2016, UTA’s operating budget was approximately \$365 million, of which approximately \$51 million comes from passenger fares (refer to Chart 1). Of the \$51 million collected from passenger revenue, about \$22 million comes from contracts UTA negotiates with partners in government, education, and business. The remaining \$29 million (about eight percent of the operating budget) comes from riders paying on the bus, at the TVM, or purchasing a period pass, such as a monthly pass. While this \$51 million and \$29 million are small compared to the agency’s overall inflow of \$365 million, loss of revenue would impact the ability of the agency to provide adequate service.



**Chart 1: UTA Revenue Sources, 2016**

Source: 2016 UTA Comprehensive Annual Financial Report (CAFR)

## Revenue & Ridership, by fare type

Following are general proportions of average weekday ridership compared with revenue, by source:

- Revenue collected through cash, credit cards, and debit cards accounts for about thirty percent (30%) of passenger revenue in 2016. Ridership from these customers is approximately twenty-five percent (25%) of daily weekday ridership;
- Monthly pass sales represent nineteen percent (19%) of revenue and seventeen percent (17%) of weekday ridership;
- FAREPAY is an electronic fare collection (EFC) product available to the public at some area convenience stores and at UTA Customer Service locations. It allows loading of funds onto a smart card that can then be tapped upon system entry and exit for payment of fare. This product accounts for approximately eleven percent (11%) of revenue and twelve percent (12%) of ridership;
- Passes acquired by riders through a higher educational institution (Ed Pass) accounts for sixteen percent (16%) of revenue and thirty-one percent (31%) of ridership;
- Eco Passes are administered through employers to their workforce. This source accounts for nineteen percent of revenue (19%) and seven percent (7%) of ridership.

## Findings from Stage 1

A brief summary of the findings of staff's initial research in the categories of peer agency trends, fare payment methods, and rider travel patterns are shared in the sections below.

### Peer Agency Research

Staff researched peer transit agencies to understand their approaches to fare collection. The peer agencies studied include: King County Metro and Sound Transit of Seattle, Washington; RTD of Denver, Colorado; TriMet of Portland, Oregon; DART of Dallas, Texas; Metro of Minneapolis, Minnesota; Capital Metro of Austin, Texas; Metro of Houston, Texas; RTA of Cleveland, Ohio. In response to the Board's request, two international agencies; Calgary Transit of Calgary, Canada; and VAG of Freiburg Germany; were added. Peer agencies were selected based on a variety of reasons including: similar size, similar modes, common technology platform, or program reputation.

- It is common to have higher fare on more premium services, such as commuter rail; typically according to distance traveled and/or time of day.
- Approaches to changes in fare among U.S. peer agencies are largely increases to fare in order to cover gaps in operating costs. Sometimes, fare increases are mitigated for impact to low income persons through the development of programs to increase affordability.
- Measuring the cost of fare collection is not standardized across the transit industry, so it is difficult to compare costs between U.S. peer agencies.
- Many of the agencies who have electronic fare collection (EFC) are moving from a card-based to an account-based system, similar to what UTA has. In the past the cost of the EFC systems have been commonly underestimated prior to implementation. These differences in actual costs have caused some agencies to abandon smart card fare collection and/or to take legal steps against software vendors. Some view mobile ticketing as an alternative to a viable option for replacement of other EFC systems.

In summary, the approach to fare collection can differ greatly by agency, depending on the direction provided by the agency board in terms of priorities.

### Fare Payment Methods

For UTA specifically, it has been determined that each fare payment method appeals to differing markets and that each has its own strengths and weaknesses... Following are some findings of the research.

- **Cash** collection on board is less expensive to collect for UTA when compared with other agencies. This is because the agency never upgraded fare boxes to include more technologically-advanced (although maintenance intensive) features. Many riders use cash either because it is their only means or because they consider it the most convenient method for less frequent use.
- **Credit cards** and **debit cards** use at TVMs is growing in recent years and fees associated with these transactions represent one of the largest growth in cost of collections for the agency. The use of cards at TVMs is convenient for customers who do not typically carry cash or have a pass or FAREPAY card.
- **Monthly passes** are widely used by a variety of customer segments including human services agencies as well as those purchased by the public. In recent years, monthly pass sales has declined, somewhat due to rider migration to FAREPAY. Monthly Passes provide benefit to the frequent rider in the form of a predictable cost for use of the UTA system. They also provide a predictable source of funding to the agency in comparison with a pay-as-you-go method. The product has a low cost of collection for the agency compared with other methods of payment. The method is more convenient than cash, as validation requires only visual inspection.
- UTA was at the leading technological forefront of **electronic fare card (EFC)** payment and validation and was among the first transit authorities in the world to implement an account-based smart card payment method. EFC offers a convenient method of validation for UTA riders and UTA bus operators, provided the software and hardware are working properly. The three main EFC product types at UTA are Eco Pass, Ed Pass and FAREPAY. The FAREPAY product is popular with customers due to its convenience, especially as it reduces the need to purchase tickets at TVMs. The product was released with a promotional rate. Either continuing or eliminating the FAREPAY promotional rate will need to undergo Title VI analysis and public hearings.
- **Mobile ticketing** may provide a convenient alternative to other fare media. Verification of valid mobile tickets could be visual and/or electronic validation. Mobile ticketing may reduce the need for validation hardware and may reduce customer dependence on TVMs. Approximately eighty-eight percent (88%) of surveyed UTA riders have a smart phone. UTA will launch a mobile ticketing application in fall 2017.

In summary, each method provides benefit to some portion of the current UTA rider segment. Overcoming the challenges associated with each method, specifically the potential benefit or impact to UTA riders, should be evaluated in any change going forward.

### Travel Patterns and Payment

In order to understand the potential impacts of changes in fare structure, rate, or payment method, staff looked at the most common travel patterns among UTA riders and the proportions of payment utilized for travel in each of the top categories. Among the initial findings:

- **Cash/credit/debit card** is the most common method of payment for the top 3 most common trip patterns in the UTA system [1) One bus only; 2)One TRAX only, 3) bus-TRAX transfer]
- **University of Utah Eco Pass** use is the 2<sup>nd</sup> most common source of fare among the top two trip patterns for UTA riders [1) one bus only, 2) one TRAX only];
- For those trips that necessitate a transfer, **monthly pass** use occurs in larger proportion;
- **FAREPAY** exceeds monthly pass use in those journeys where one leg includes a FrontRunner trip
- **Eco Pass** and **Ed Pass** use is higher, proportionately, for those trips that include a transfer and/or include a FrontRunner leg.

In summary, any change to fare system considered should consider fare use among existing riders as well as opportunities to attract new riders.



## Next Steps & Timeline

As previously mentioned, as of the date of this summary, staff has completed Stage 1 of the Project and is entering Stage 2. This includes Phase 1 of the Public Engagement Plan. The tasks associated with Stage 2 of the Project are listed below.

### **Stage 2** (August – December 2017)

*August – September 2017:* Development of viable System Options

*September – October 2017:* **Public Engagement Plan Phase 1.** UTA staff will consult with UTA riders and stakeholders to gather feedback on the Options.

Targeted groups for engagement:

- UTA Riders on-board or entering the system;
- Members of and advocates for persons traditionally underserved and/or at a transportation disadvantage including: People with disabilities, minorities, people who are low income, and veterans groups;
- General public;
- UTA front line employees including: UTA Operators, Fare Inspectors, and Customer Service.

Through Phase 1 of the Public Engagement Plan, staff will collect input and feedback from the target groups which will inform the qualitative analysis of the Project goals of Ease of Use, Understandability, and Affordability and Accessibility, as well as insight in relation to the other criteria, as applicable.

*September – November 2017;* Quantitative analysis. UTA internal staff to look at the potential impacts of each System Option in relation to the following Project goals: Ridership, Revenue, Cost of Service, Fare adjustment analysis, Legal obligations, Responsible Investment, and Positioning UTA for the future.

*December 2017;* CEO Jerry Benson will present a refined set of System Options to the Board to carry forward to pricing and further public engagement during winter 2017-18 and spring 2018.