

FY 2018 Marketing Plan

Regional Transit



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Introduction

The Regional Transit Marketing Plan provides a marketing and communications strategy for transit services in the Tucson area, which include Sun Tran, Sun Express, Sun Van, Sun Shuttle and the Sun Link streetcar. The plan identifies strategies to address the needs of these transit services, as Sun Tran staff is tasked with handling the marketing for all regional transit systems.

The plan utilizes information obtained from the On Board Survey completed in FY 2016 for Title VI analysis required by the Federal Transit Administration (FTA). The major focus of the Marketing Plan is to grow ridership this year for Sun Tran, Sun Express, Sun Link and Sun Shuttle. The Sun Tran Marketing team will partner with the City of Tucson and five districts along the streetcar alignment to enhance marketing efforts and continue to grow Sun Link ridership. Additionally, the team will work closely with the Regional Transportation Authority (RTA) to evaluate route performance and marketing needs for Sun Shuttle.

The goals of this marketing plan are aligned to serve the mission, vision and goals established by Sun Tran, which provides a baseline for all transit systems in the region. This marketing plan includes Sun Shuttle and Sun Shuttle Dial-a-Ride, but focuses marketing and communications efforts for Sun Tran and Sun Link. Although marketing Sun Van services is not a main focus, communications assistance will be provided regularly for passengers, potential passengers and staff.

MISSION: Working together to improve the community's quality of life by providing safe, efficient, reliable customer-focused public transportation.

VISION: Public transportation becomes the preferred choice for travel in the region.



FY 2018 Goals

This plan has five main goals, which have been established by Sun Tran staff as areas of focus for FY 2018. Marketing strategies and measurable outcomes to reach these objectives will be described in detail later in this document.

1. Increase ridership on Sun Tran, Sun Express, Sun Link and under-performing Sun Shuttle routes. All systems experienced a significant decrease in ridership due to the labor strike against Sun Tran in FY 2016, and sustained low fuel prices have impacted transit ridership locally and nationwide. However, the Sun Tran labor contract with the Teamsters Union was successfully re-negotiated in July for three years, and this is a good opportunity to build relationships with passengers and promote a positive outlook for the future of our transit system.
2. Promote Sun Link streetcar services to maintain awareness and excitement around the newest transit option in order to encourage non-transit riders to try transit and inspire current passengers to ride more frequently.
3. Improve passenger information and communication for all transit services to enhance the regional transit experience. This year, staff aims to improve communications and outreach through increased use of marketing e-Blasts, social media and a redesigned website for transit in the Tucson region.
4. Increase the use of the SunGO fare payment system and the GoTucson Transit mobile ticketing application to minimize the use of cash to board transit services and improve the ability to travel easily throughout the region. This includes increasing the number of purchase locations for more accessibility of SunGO products and increasing awareness of the GoTucson Transit App. This is especially important given the changes to the transfer policy in August 2016. This change requires all passengers to have a SunGO Card or SunGO ID & Card to obtain a free transfer when paying the cash fare. In addition, the fare change of 2017 allows passengers to receive a discounted fare when paying with stored value versus cash.
5. Improve internal and external customer relations throughout Sun Tran and Sun Van. After the 42-day strike of 2015, there is still discord between Sun Tran operators and passengers, and between Sun Tran and the public. Not all Sun Tran employees understand what is behind this discord, or the urgency towards adopting a renewed commitment to customer service. The public needs to see communications coming from Sun Tran which show there is a commitment to customer service, hard work and striving for excellence.



Target Markets

Transit systems in the Tucson Metropolitan area, which include Sun Tran, Sun Express, Sun Shuttle and Sun Link, provide beneficial services to thousands of individuals each day. The following target markets, which were determined from on-board survey results, will be addressed when implementing marketing strategies for FY 2018.

University of Arizona (UA) & Pima Community College (PCC) Students, Faculty & Staff

This year staff is promoting the 50 percent discount provided by UA Parking & Transportation. Sun Link travels through campus and provides transfer options to/from other regional transit services, so the multiple UA audiences are the primary target group for streetcar promotions, and are a major target for Sun Tran as well. Encouraging individuals to take advantage of the 50 percent subsidy provided by the UA for semester and annual transit passes remains a goal, as well as exceeding the impressive sales from FY 2016 and FY2017, with the ultimate goal of exceeding sales from FY 2015, all three of which have exceeded all U-PASS sales historically.



Continued efforts with PCC may result in a promotion to encourage ridership among their students, faculty and staff. In August, Sun Tran Route 9 began traveling to Pima College West Campus along with routes 3 and 5. Although PCC locations do offer extensive free parking, making transit less beneficial, they do have a desire to encourage students, faculty and staff to ride transit. However, PCC does not sell semester or annual passes or subsidize any transit passes at their campuses.

Low-Income

According to the results from the On-Board Survey conducted in FY 2016, the total annual household incomes of transit riders are as follows:

- Less than \$10,000: 20.5% of all riders
- \$10,000 - \$14,999: 15.5% of all riders
- \$15,000 - \$24,999: 23.6% of all riders
- \$25,000 - \$34,999: 18.1% of all riders
- More than \$35,000: 22.3% of all riders

Overall, the percentage of transit riders living in households with incomes less than \$24,999 per year is 59.6 percent. This means that 59.6 percent of all transit riders earn less than \$12 per hour. During a strike, this group is most likely to be greatly affected, since they have fewer transportation alternatives. As a result, this group is likely to harbor resentments towards Sun Tran bargaining unit employees for striking for 42 days when they were already making more per hour than the riders. Internal and external marketing efforts need to address this issue to heal the discord between riders and drivers.

Seniors

Seniors aged 65 years and older make up 5.3 percent of the total ridership. This is a very low percentage of total riders, especially when considering that this could be the best transportation option for seniors living on social security or those who are no longer able to drive. The Marketing team has worked with various senior groups to make registering for a SunGO ID & Card part of the START Mobility trainings. The marketing team will



develop additional strategies to promote regional transit services amongst this age group and improve the independence of our older populations.

Individuals Traveling Along Key Corridors & Frequent Transit Network

There is a current focus on marketing transit to major employers and apartment communities within a quarter mile of key Sun Tran routes, especially the 11 routes included in the Frequent Transit Network (FTN) and the Sun Link streetcar. Individuals living and/or working near the FTN could represent a growth market for transit. Communications will encourage the use of public transit among commuters, improving perceptions of public transit and potentially increasing the use of other forms of public transportation.



Car Owners

Some riders own a car, but elect to use transit for some or all of their travels. The marketing team will work to increase ridership from this group on Sun Link and Sun Tran. Communications for car owners will encourage using transit for commuting on Sun Tran and Sun Link, and for going to dinner, a night out, family activities, tourist attractions, libraries, movies, museums, and events on Sun Link. A description of the demographics and ridership behaviors of Car-Owning Transit Users is given in the Customer Trends section of this document.

Commuters

Several of the target groups above are commuters. In general, this is a target audience that we will try to attract to transit use, since respondents in the 2016 On Board Survey listed home and work as their two most common points of origin and destination.

Organizations in the Pass Provider Program

The desire to continue growing the Pass Provider Program and encourage more individuals to take transit to their work, human services provider or school is a continued focus. Staff will enlist businesses, schools, human service providers and miscellaneous organizations to join the Pass Provider Program to mitigate parking challenges and provide a valuable service to their clientele.

Cash Paying Riders

Sun Tran Marketing staff dedicated many resources into marketing the SunGO card in FY 2017. In August 2016, the new transfer policy began, allowing passengers to continue receiving free transfers with a SunGO card. With new fares launched in January 2017, passengers that have loaded value on their SunGO cards pay a discounted fare. This new policy encourages passengers to use their SunGO cards. The goal is to continue to reach cash paying customers and encourage the use of the SunGO fare payment system and the GoTucson Transit mobile ticketing app, so cash payment is minimized, boarding is sped up, and the passenger's ability to transfer throughout the region with ease is maximized.

Communities Surrounding Underperforming Sun Shuttle Services

Sun Tran’s marketing team will work closely with the RTA to evaluate ridership of all Sun Shuttle routes and those deemed as underperforming will continue to be a target segment.

Current Ridership

According to the On Board Survey conducted in 2016, transit passengers include:

26.3% are 25-34 years of age	79.1% of Sun Tran riders and 90.2% of Sun Shuttle riders are not students; 65.1% of Sun Link riders are students
52.8% are male	92.9% speak English well or very well
67.3% identify as White	53.0% of riders do not have a working vehicle at home
91.8% do not have a disability that hinders mobility	95% of all passengers access transit by walking
56.8% do not use a transfer during a one-way trip	48.9% of trips start/end from home



Sun Tran will utilize the existing fleet until FY 2019 when 23 new 40-foot CNG buses are received. The average age of the Sun Tran fleet is 6.9 years.



Sun Van introduced 19 replacement vehicles in FY 2017. The average age of the Sun Van fleet is 3.4 years.

Situational Analysis

Environmental Review

A current environmental review identifies several areas that could impact transit through FY 2018.

Sun Tran currently operates 41 fixed routes, which includes 12 express routes. The active fleet is comprised of 246 buses, with 100 percent utilizing cleaner-burning fuels, including Biodiesel, Compressed Natural Gas (CNG) and hybrid electricity. This enhances the City of Tucson’s use of alternative fuels and improving air quality in the community.

Sun Tran ridership in FY 2017 was 16,388,315 passenger trips provided. When comparing ridership levels between FY 2016 and FY 2017, and excluding August and September data from both years to nullify the effects of the strike in FY 2016, Sun Tran experienced a 6.8 percent decrease in ridership. These ridership losses are similar to those experienced by transit providers across the country. With major marketing campaigns planned for FY 2018 focusing on the Frequent Transit Network, improved relations between riders and drivers, and the new 3-Day Pass, Sun Tran is hopeful there will be an increase in FY 2018.

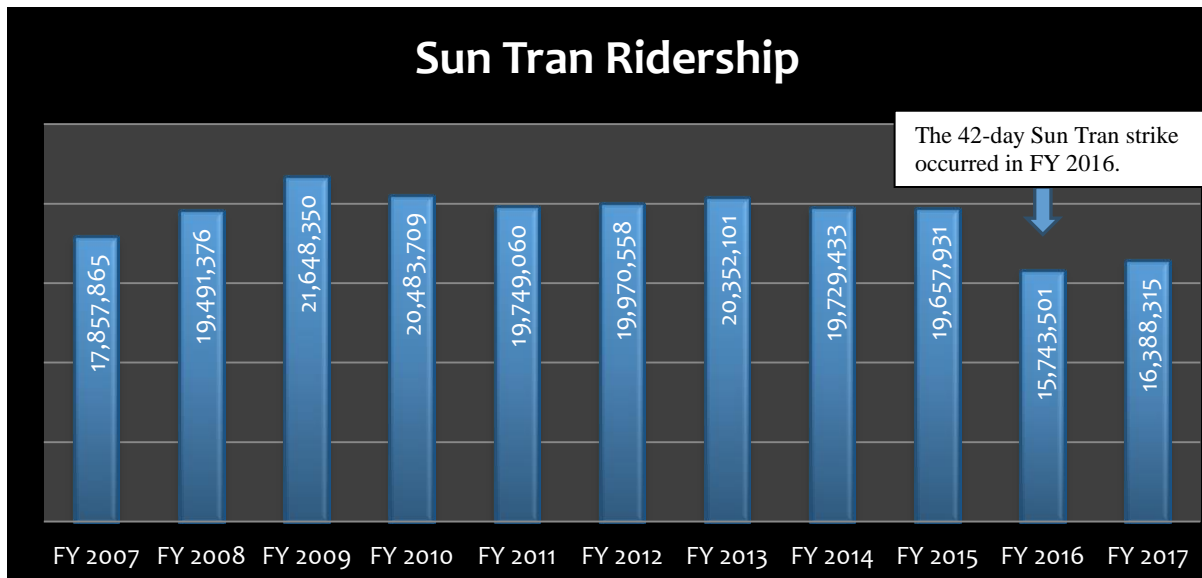
Sun Van has an active fleet of 135 wheelchair accessible vehicles, of which about 95 percent runs on unleaded gasoline with the remainder running on Ultra low Sulfur. Ridership in FY 2017 experienced a 1.4 percent decrease, for a total of 569,637 passenger trips provided.

Sun Shuttle provides service to San Xavier, Tucson Estates, Green Valley, Sahuarita, Southeast Tucson, Rita Ranch, Oro Valley, Catalina, Marana and Ajo. Service is provided by Total Transit and the Town of Oro Valley, who are contracted with the RTA. Ridership for FY 2017 for all routes reached 233,439 passenger trips provided, which is a decrease of 14.6 percent when compared to the previous year.

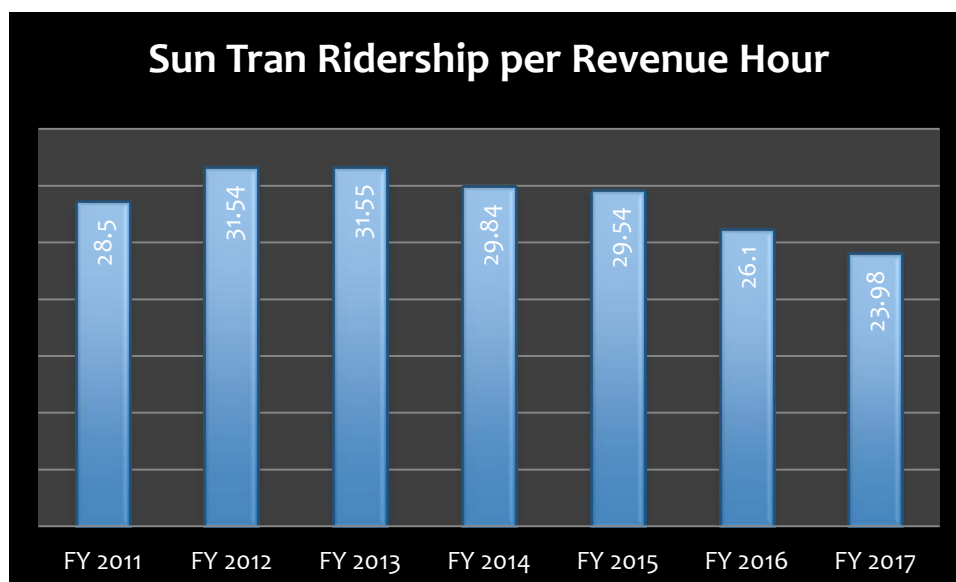
The Sun Link streetcar operates eight electric cars that are wheelchair and bicycle accessible. These cars can carry up to 146 passengers to their desired destination. Three million riders were recorded just weeks after the third anniversary, which was celebrated in July 2017 with a free ride day sponsored by Tucson Electric Power and Health On Broadway. Additionally, a concert on board was coordinated in partnership with KXCI.

Ridership by System

Sun Tran - The system peaked in FY 2009 with ridership reaching 21,648,350 passenger trips. Though ridership on Sun Tran has fluctuated since then, which included a drop to 19,749,060 passenger trips in FY 2011, ridership remained flat through FY 2015 with 19,657,931 passenger trips. FY 2016 ridership was 15,743,501 passenger trips, which was 20 percent below pre-strike ridership numbers when compared to the previous fiscal year, due to the 42-day work stoppage in FY 2016 and lower-than-average gas prices. FY 2017 had 16,388,315 passenger trips, which were lower than pre-strike levels. As mentioned above, comparisons between FY 2016 and FY 2017 can be somewhat misleading since the 42-day strike is included in the FY 2016 data.

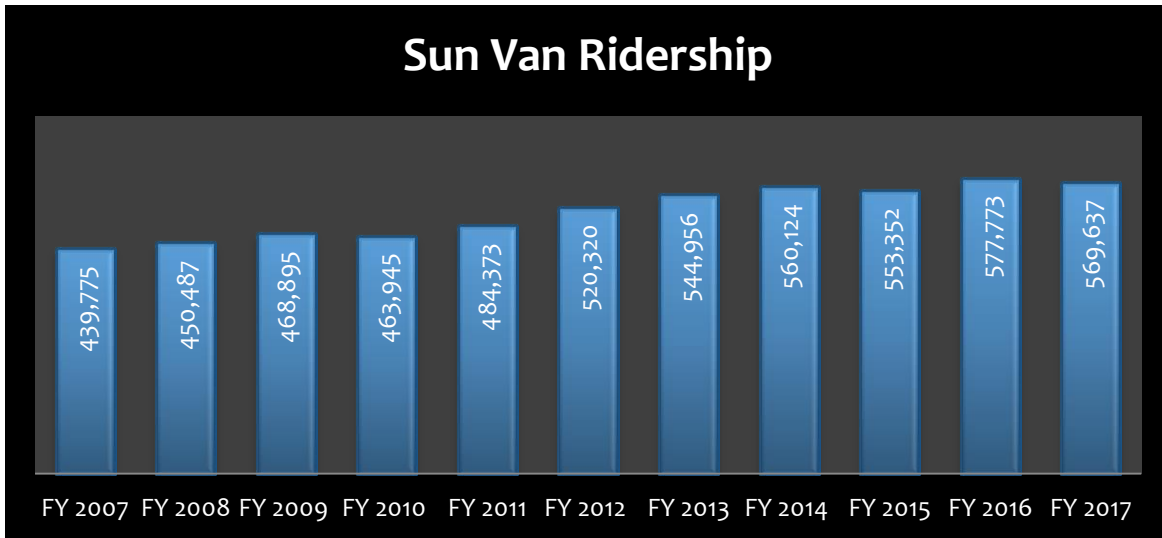


The chart below provides data for ridership per revenue hour which quantifies ridership, taking into account the level of transit service provided. In FY 2017, ridership appeared to have increased mainly because there were 13.3 percent additional service hours over FY 2016 levels. However, the ridership per revenue hour in FY 2017 dropped by 8.1 percent from the previous fiscal year.



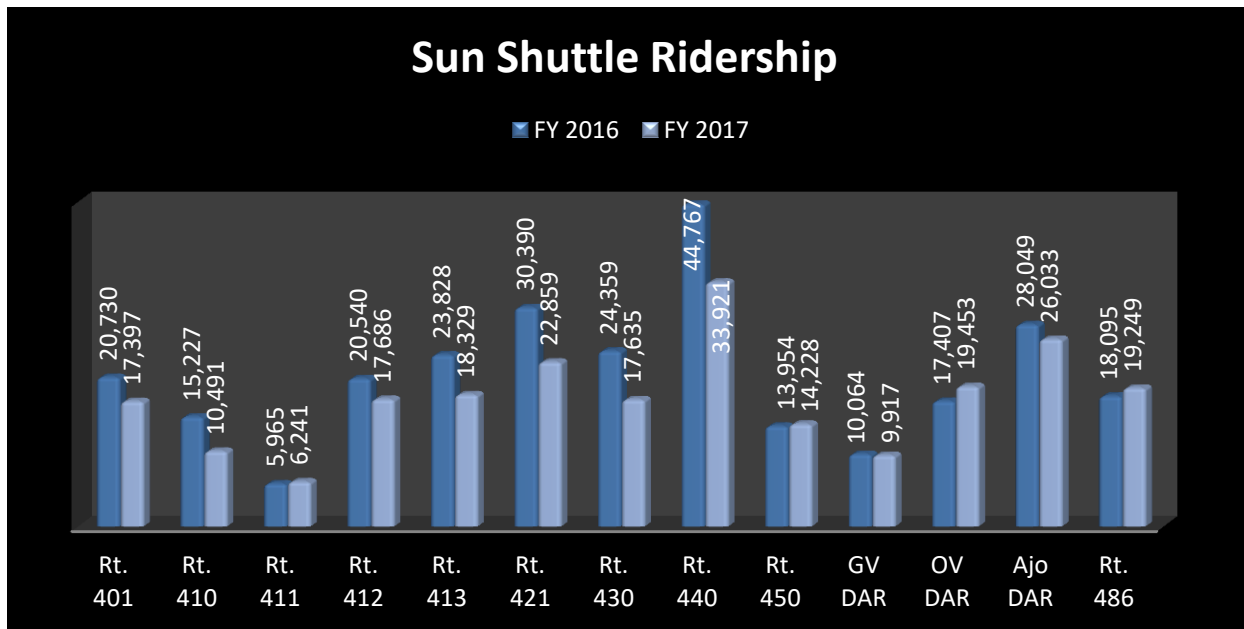
With the only new bus service being introduced in FY 2018 being the Route 9 extension to PCC West Campus, Sun Tran plans to heavily promote the Frequent Transit Network. The regional system expects to continue attracting new riders and expand its discretionary rider base with the Sun Link streetcar system, continue increasing usage of the SunGO fare payment system, and upgrade technologies to help transit users better navigate the system, such as the newly split GoTucson Transit mobile ticketing app and the Sun Tran app.

Sun Van - Ridership grew by nearly 27 percent between FY 2007 and FY 2014, with FY 2014 ridership at 560,124 passenger trips. Although ridership decreased slightly in FY 2015, it increased FY 2016 by 4.4 percent to 577,773 passenger trips and then decreased by 4.1% in FY 2017. FY 2017 ridership was 569,637.



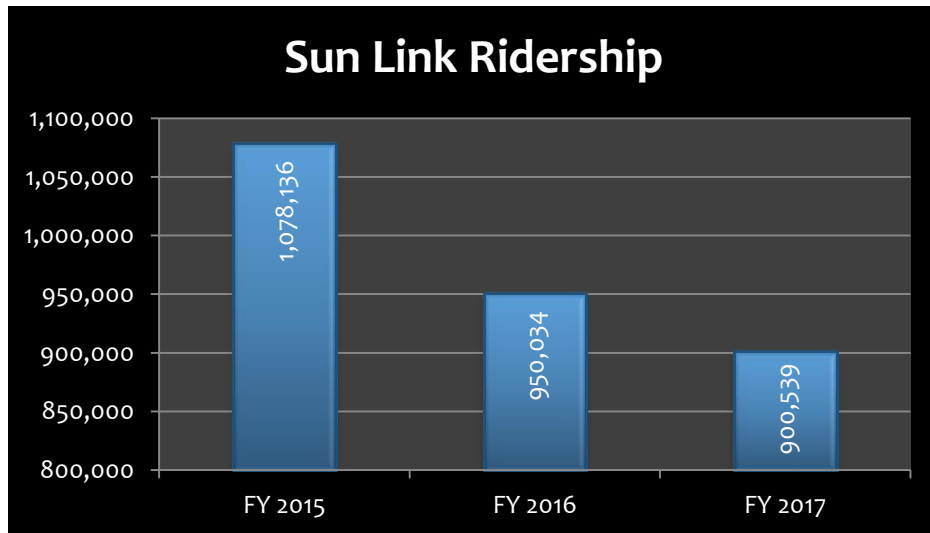
Sun Tran/Sun Van encourages paratransit passengers to utilize fixed-route service, which is ADA accessible. However, it is unclear how many have made that transition, even if only for select trips.

Sun Shuttle – Although Sun Shuttle routes regularly experienced ridership growth since service launched in FY 2010, ridership decreased in FY 2017 by 14.6 percent when compared to FY 2016. In FY 2017, Sun Shuttle ridership recorded 233,439 passenger trips.



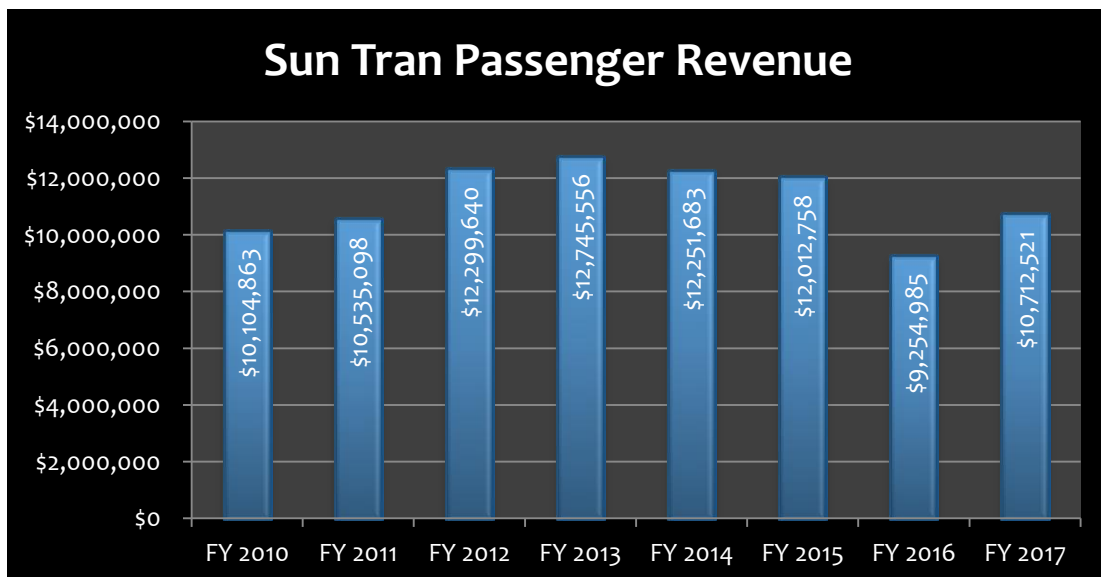
When comparing Sun Shuttle ridership in FY 2017 to FY 2016, four routes experienced an increase: Routes 411 in Marana, 450 in Rita Ranch, 486 to Ajo, and Oro Valley Dial-a-Ride. Route 410 in Marana experienced the most significant decrease of 31.1 percent while Green Valley Dial-a-Ride had the smallest decrease at 1.5 percent.

Sun Link – The Sun Link streetcar, celebrated its third year of service July 22, 2017, and met ridership projections. The 3 millionth rider milestone was achieved and celebrated just after the third year of operation. Sun Link provided 1,078,136 passenger trips in FY 2015, with ridership decreasing slightly in FY 2016 to 950,034, and to 900,539 in FY 2017.



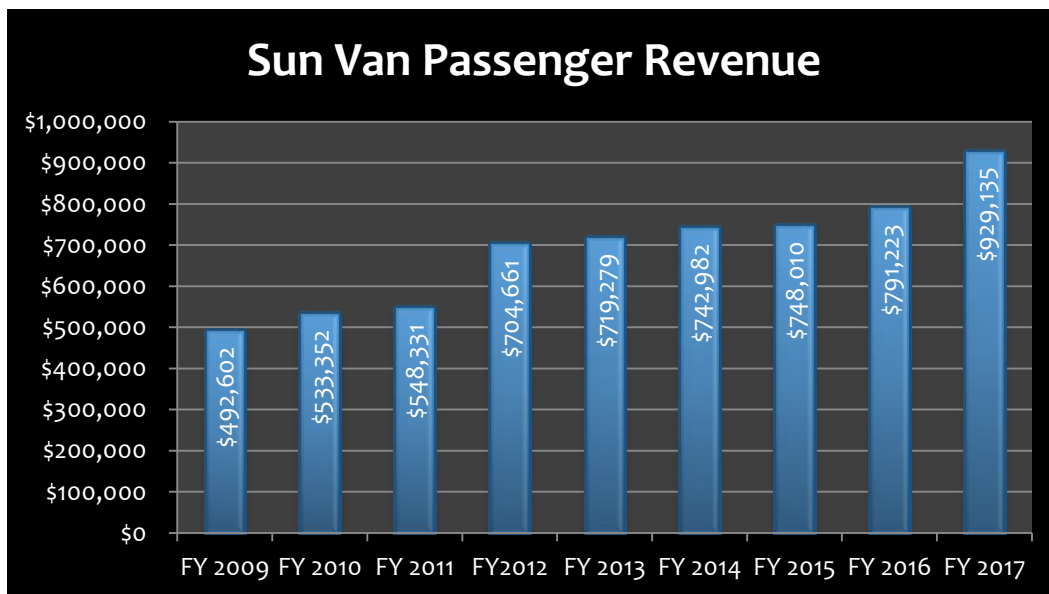
Passenger Revenue

Sun Tran passenger revenue continued to increase through FY 2012, while remaining fairly stable since, until FY 2016. Revenue rebounded in FY 2017 due to the increased service provided over the fiscal year, and the fare change which went into effect in January 2017.



The growth through FY 2012 was due in part to an internal focus on collection efforts, and fare increases in August 2009 and July 2011. Revenue remained fairly flat FY 2013 through FY 2015. For FY 2016, Sun Tran’s revenue decreased by nearly 23 percent when compared to FY 2015, largely due to the 42-day work stoppage. In FY 2017 revenue was up 15.7% at \$10,712,521, which was due to the increased service provided and the 2017 fare increase.

Sun Van passenger revenue increased largely due to the 2009 and 2011 fare increases, with revenues continuing to trend upward in line with ridership. When comparing data from FY 2017 and FY 2016, Sun Van revenues increased 17.4 percent to \$929,135. The revenue per passenger had increased from \$1.37 in FY 2016 to \$1.75 in FY 2017, which was a 27.7 percent increase. These increases in revenue came about despite a slight reduction in ridership, and were due to the fare change in 2017, which included the same rates for ADA service, but increased prices for low income trips and for non-ADA optional service.



Other factors affecting transit in the region

Regional Expansion

Regional issues will continue to influence transit in the coming years. The RTA was approved in May 2006, and includes several Sun Tran service enhancements to be implemented over the remainder of the 20-year plan, such as additional frequencies and route extensions. The area surrounding downtown, the University of Arizona, Main Gate Square, San Augustin Mercado and Fourth Avenue has experienced a resurgence of retail, residential and commercial activity, since the Sun Link streetcar began revenue service on July 25, 2014. The City of Tucson’s Mayor and Council have a vested interest in the success of transit, and are particularly interested in successful ridership on Sun Link and possible expansion, which could translate into increased regional development, transit ridership and an improved perception of transit overall.

Shifting Demographics

Population growth and demographic changes are also considerations. According to the U.S. Census interim state population projection for 2000 to 2020, Arizona's population is projected to grow 64.8 percent, with the most dramatic change anticipated for persons 65 years and older, an increase of 127.7 percent. This signals an increasing need for older Pima County residents to learn about fixed route public transit services or other special needs transportation.

National Trends

The public transit industry has seen major changes in 2016 and 2017 with the rapid adoption of transit app use and the emergence of transportation network companies like Uber and Lyft. And sustained low fuel prices since late 2014 have negatively impacted transit ridership nationwide. Studies of Sun Tran's peer transit systems for cities of similar size and demographics across the country have shown significant ridership decreases since the end of 2014. To illustrate the national decline, the following peer systems in the west also showed big decreases from FY 2014 to FY 2016. Data was not yet available for FY 2017.

- Albuquerque: 12.2% decrease
- Bakersfield: 9.7% decrease
- Fresno: 11.5% decrease
- Memphis: 5.6% decrease

On the other hand, El Paso did show a 2.2% increase in ridership during this time period, but much of the increase was due to starting up new service - a new Bus Rapid Transit line.

Political Landscape

A positive ongoing working relationship with the City of Tucson and direction from the Tucson Department of Transportation (TDOT) are instrumental in operating the Sun Tran and Sun Van systems. TDOT provides guidance on managing the systems and promoting transit to the community. Sun Tran's management team, along with administrative staff, work in tandem with TDOT to share information with Mayor and Council and other interested parties.

Since September 1, 2017, staff from RATP Dev have managed Sun Tran and Sun Van, in addition to the Sun Link streetcar. It is hoped that a single transit management service provider will bring about even greater collaboration between these transit systems, and that this will carry over to riders for a more seamless transit experience.

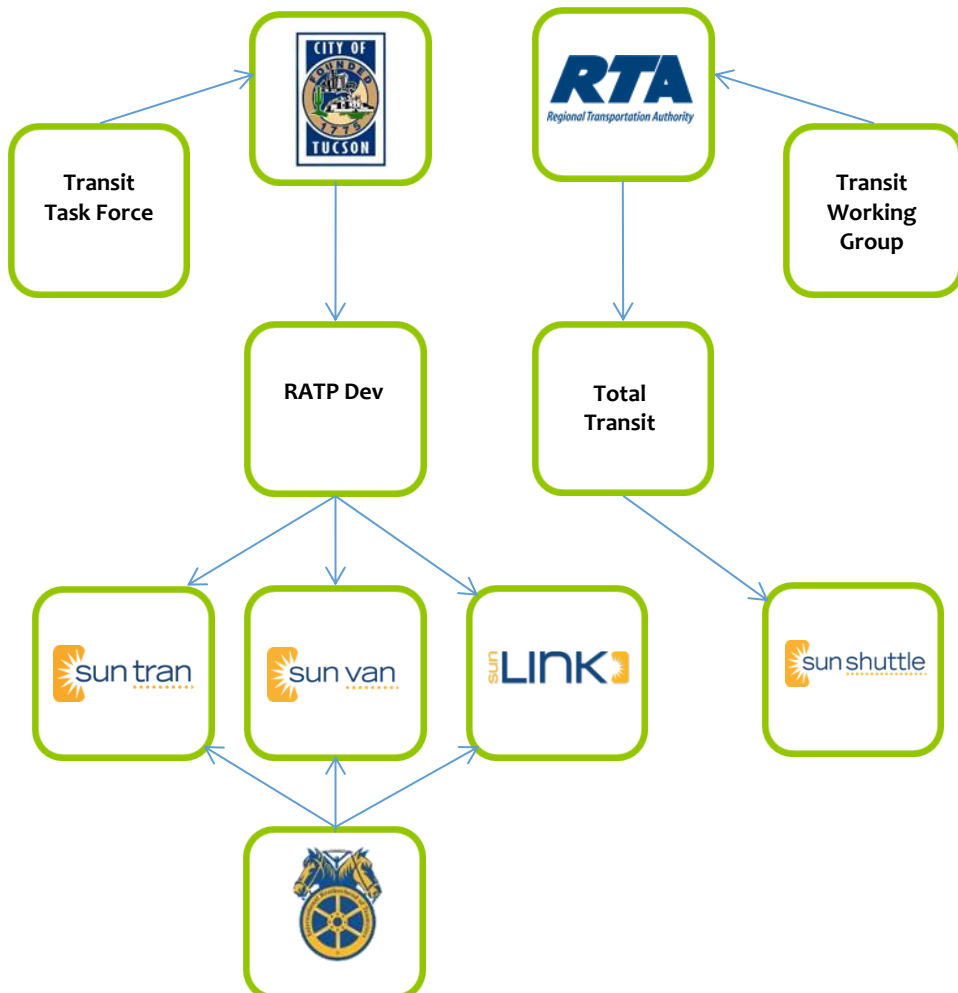
With Sun Link celebrating its third anniversary July 22, 2017, Sun Tran staff works closely with a select team of City of Tucson, TDOT and Sun Link staff to implement marketing and communication strategies to expand ridership. Additionally, Sun Tran staff provides call center functions for RTA-funded transit services, information technology assistance and scheduling assistance to ensure all services inter-connect to enable passengers to transfer throughout the region with ease.

TDOT, Sun Tran, Sun and Sun Link continue to work with the City of Tucson’s Transit Task Force (TTF) on local transit issues. The TTF, with the assistance of Sun Tran and Sun Van staff, continue to evaluate transit services with a long-term view. The TTF evaluates the needs of the community, works to improve system efficiencies and suggests ways to increase ridership and revenue through evaluating pass options and promotional opportunities.

On a regional level, Sun Tran works in close partnership with Pima Association of Governments (PAG), the regional planning organization. PAG was instrumental in facilitating the passage of the RTA’s Regional Transportation Plan, the 20 year, \$2.1 billion regional transportation plan voters approved in May 2006. The goals of the RTA are to build consensus among regional jurisdictions on transportation-related issues and implement transportation improvements specified in the RTA Plan.

Finally, a three year contract between Teamsters Local 104 members for Sun Tran was signed in July 2017. Sun Van will re-negotiate their contract in December 2017.

The relationships between the major stakeholders directing transit in Tucson are shown in the chart below.



Customer Trends

While economic conditions and budget shortfalls make it a struggle to maintain the core system to meet the needs of riders, the goal of FY 2018 is to increase ridership and revenue. Ridership experienced a significant decrease due to the strike in 2015 with a continued drop-off due to consistently low gas prices. Sun Tran will work to help ridership recover and achieve ridership growth by attracting more riders through:

- 1) Excellent customer service provided by all staff. As the public face of Sun Tran, the drivers are the employee group with the highest potential to make an impact through improved customer service. Sun Tran's Marketing Department will work with the new management team to improve internal communications throughout the organization, and will post communications externally highlighting examples of drivers providing excellent customer service.
- 2) Promoting the Frequent Transit Network and Sun Link streetcar to all who live or work within close proximity of these routes
- 3) The use of new technology that make transit more convenient, such as social media and mobile phone applications (Google Transit, GoTucson Transit Mobile App and the Sun Tran App)
- 4) Promotion of the regional transit system to all potential rider demographics
- 5) Enhanced perception of security, making transit a safe option for travelers

The Marketing Department has conducted various research projects to determine customer demographics, attitudes, image and awareness of Sun Tran and its services. Methodologies have included telephone surveys, focus groups, and on-board studies. The following is a brief description of significant findings from the 2016 On Board Survey, which is the most recent study of transit riders in the Tucson region.

Description of Riders of Regional Transit from the 2016 City of Tucson On Board Survey

- Just over half (53%) of riders do not have a working vehicle in their household.
- 76.3% of riders are not students
- 63.1% of riders are employed (either full-time or part-time)
- 46.8% indicate they have a valid driver's license.
- The highest frequency riders are between the ages of 25-34 years of age (26.3%), while 18-24 years old are the second highest age range (21.8%).
- 77.7% of riders make less than \$35,000 annually for their overall household income.
- 52.8% of riders are male.
- 91.8% indicate they do not have a disability that limits their mobility.
- 70.9% reported their ethnicity as "white"
- 94.6% of riders walk from their origin to the bus stop.
- 95.5% prefer walking to get from where they exit the bus to their final destination.
- 73.7% used no additional transfers for their one-way trip.
- 89.1% either started or ended their trip from home.

Description of Car-Owning Transit Users from the 2016 City of Tucson On Board Survey

- 74.1% are not students, and 24.9% are full time or part time college/university students
- 82.3% employed full time or part time
- The largest age group (24.9%) is between 25-34. Of this age group, 74.8% are employed full time, 18.7% are college/university students and 81.1% make \$25,000 or more per year.
- 43.2% earn between \$25K - \$50K per year
- 54.1% are male, 45.9% are female
- 97.4% reported no disabilities
- 74.2% are White/ Caucasian
- 79.7% speak English at home and 16.3% speak Spanish
- 93.3% of those speaking another language at home speak English well or very well

Ridership behaviors of Car-Owning Transit Users from 2016 City of Tucson On Board Survey

- 72.2% ride Sun Tran, 25.9% ride Sun Link
- 69.8% were on frequent transit (Sun Link and Sun Tran frequent routes at time of survey)
- 9.1% of riders were on express routes
- 77.7% rode one route only between their origin and destination
- 84.0% use transit 2 or more times per week
- 34.4% used web-based tools, 33.2% did not do any trip planning, and 27.0% used paper schedules
- 34.6% pay their fare with cash, 23.0% use stored value, 21.6% use SunGO full fare passes, 14.1% use U-Pass products
- 43.9% of 25-34 year olds and 37.6% of 35-44 year olds pay with cash
- Over 85% walk to and from their transit stop
- 85.0% of trips originate at their home, workplace, university or college, and 74.9% trips are to the same destinations.

Based on experience and previous studies, below is a short list of metrics which Sun Tran needs to continue to focus on to meet the needs of our customers.

- Driver friendliness: Previous studies have shown that this is an area which is highly important to Tucson area transit riders.
- Buses arrive and depart on time: Sun Tran's Scheduling Committee to continues to adjust schedules to improve on-time performance
- Buses come frequently enough to meet needs of riders: The Frequent Transit Network provides 11 routes with frequencies of every 15 minutes or less on weekdays from 6 a.m. to 6 p.m.



- Information at bus shelters: Sun Tran installed new bus stop signs at all 2,200 stops, which list the route serving the stop, the stop number and the web address so riders can easily find next bus arrival times and engage in trip planning.
- Buses go where riders need them to go: Staff evaluated actual usage of the system during the Comprehensive Operational Analysis (COA) of 2013. All COA service changes were implemented in FY 2016 and FY 2017.
- Travel by transit is a good value: Compared to peer systems, the Tucson area provides transit at a cost well below the average.



Operational Trends

The regional transit systems faced new challenges and opportunities as a result of a significant ridership decrease in FY 2016 from the extended strike situation.

- Returning to pre-strike ridership numbers
- Maintaining high output with the challenges of being a blended organization for Sun Tran, Sun Van and Sun Link, with separate management companies for Sun Shuttle and Sun Shuttle Dial-a-Ride
- Managing priorities to ensure all regional transit services' needs are met.
- Use of new technologies (web, mobile, social media, apps, etc.)
- Passenger information with parallel messaging throughout the regional system
- Prioritizing marketing services to multiple systems
- Attitudes and abilities of new drivers vs. veteran drivers
- Lowering employee turn-over due to retirement and new opportunities
- Benefits/challenges of an aging workforce and loss of historical knowledge
- System security for employees and passengers
- Balancing efficiency and cost-effectiveness with the ability to attract/retain workforce and provide services that attract new riders (more convenience via increased frequency, enhanced amenities, etc.)
- Develop a people-centered environment
- Focus on environmental stewardship and sustainability
- Continue to increase the number of seniors and persons with disabilities riding transit by continuing to provide mobility training to help these individuals utilize the services and travel independently throughout the region
- Encourage the millennial generation to utilize transit services
- Inspire new riders to use transit

Factors Impacting Ridership

Below are factors that impact ridership independent of the marketing efforts in place.

- Gas prices – Gas prices have been consistently low since the end of 2014 through present date with transit ridership trending down throughout the nation.
- Weather
- Successful re-negotiation of Teamsters Union Contract for 3 years
- Increased fares
- Service planning – having a service that goes where people need to frequent.
- Population density
- Personal safety and security concerns at Transit Centers and stops
- Service Intensity
- Lingering discord between Sun Tran riders and drivers from 2015 strike
- Recently 55 bus shelters have been installed (45 new and 10 refurbished) by Tucson Department of Transportation (TDOT) to improve the riders' experience

Transit Market Segments

<p>Internal Customers</p> <p>RATP Dev staff Sun Tran Admin/non-union Sun Tran bargaining unit Sun Van staff/non-union Sun Van bargaining unit Special Services staff Garage 1 staff Garage 2 staff Staff of management companies for Sun Shuttle, Sun Link RTA (for Sun Shuttle) Total Transit staff Town of Oro Valley transit staff</p>	<p>Stakeholders</p> <p>City of Tucson (COT) Tucson Department of Transportation (TDOT) Regional Transportation Authority (RTA) Pima Association of Governments (PAG) Partner jurisdictions University of Arizona (UA) University of Arizona – Parking & Transportation Services (UAPTS) Commission on Disability Issues (CODI) Bus Riders Union (BRU) Transit Task Force (TTF) Transit Working Group (TWG)</p>
<p>External Customers</p> <p>Sun Link passengers Sun Tran passengers Sun Shuttle passengers Sun Shuttle Dial-a-Ride passengers Sun Van passengers Frequent Riders Infrequent Riders College Students/Millennials Youth/School-aged students Commuters Clients of non-profit organizations Seniors Bicyclists Individuals with Disabilities Get On Board Partners Sales Outlets Nonprofit organizations Schools Special Services clients</p>	<p>Community-at-Large</p> <p>Potential Riders Taxpayers City of Tucson Pima County Communities with Sun Shuttle service Business Associations Chambers of Commerce Outlying communities Local Media Outlets Potential Get On Board/Partners Social Service organizations Apartment communities Neighborhood Associations Residents/employers along the Sun Link route and Frequent Transit Network</p>

Outcomes of Key Objective & Strategies from FY 2017

The Marketing Department identified key objectives to help the organization meet its goals for FY 2017. Below are the key objectives, expected outcomes and results from staff's efforts.

Key Objective #1:

Increase ridership on Sun Tran, Sun Express, Sun Link and under-performing Sun Shuttle routes

Marketing Strategies	Outcomes	Results
Develop multimedia campaign to showcase the benefits of riding transit throughout the region and promoting the Frequent Transit Network	Measure the success through the ridership numbers each month and realize a 1% increase in ridership in FY 2017 when compared to FY 2016.	Staff ran several features of multi-media campaign, but the goal was not met. When comparing the 10 non-strike months of FY 2016 with the same months in FY 2017, ridership decreased by 6.8% from FY 2016 to FY 2017. Similar decreases were experienced across the country, and ridership declines were higher in many cities.
Attend community events to promote regional transit; expand the Speaker's Bureau program that presents the regional transit information to neighborhood groups, Rotary, and others.	Attend a minimum of 50 community events to promote transit	Attended 102 community events
Teach passengers how to ride transit to improve the feasibility of choosing transit over driving.	Host 19 learn-to-ride events, which include refugee trainings, START and learn-to-ride for different organizations.	Staff gave 25 presentations to Refugee Bus Trainings, START sessions and Learn to Ride events.

Implement a trial pass program (test of Pima Government and Raytheon) to offer free passes to encourage new employees to ride transit.	Determine if the individuals who received the free passes are consistent transit riders.	Of the 50 SunGO Cards with value given to Pima County employees, 12 were loaded by County employees with additional passes and were used on transit.
Develop an incentive program, which could include selecting winning SunGO Card numbers each month to encourage SunGO usage and ridership.	Do passengers express interest in winning the prize? Have SunGO sales increased?	Rather than doing this task, we chose to instead create the \$25 for \$20 program. SunGO Card usage did increase by 14.0%.
Evaluate under-performing Sun Shuttle routes and develop a media campaign to improve ridership in those areas	Increased ridership on the select Sun Shuttle routes when evaluating ridership prior to the campaign. Place long-term ads in select communities to keep Sun Shuttle top-of-mind.	Sun Shuttle ridership decreased in FY 2017 by 7.2% from FY 2016.
Work with Sun Link Communications Committee to develop Sun Link promotional strategies throughout FY 2017 (<i>see Key Objective #2 for details</i>).	Increased ridership over FY 2017	Sun Link ridership decreased by 5.2% in FY 2017 from FY 2016 levels. Staff worked with Sun Link Communications Committee and developed numerous promotional strategies.
Create a multimedia campaign to promote U-Pass.	Increase U-Pass sales of semester and annual passes by 3% when compared to FY 2016	Extensive multi-media campaign was run. Sales of U-Pass were essentially the same between FY2017 and 2016. It should be noted that there had been a 14-day promotional pass and the cost of passes had been discounted by that cost in FY 2016.

Expand use of social media to encourage ridership	Increase the number of followers by 10% when compared to FY 2016	Facebook followers increased by 12%, while Twitter grew by 14%. Instagram was added as a new social media tool.
Promote newly aligned express routes to nearby organizations and communities	Increase total number of express riders by 10% when compared to FY 2016	The goal was not met. When comparing the non-strike months of FY 2016 with the same months in FY 2017, express ridership decreased by 11.5% from FY 2016 to FY 2017. Similar decreases were experienced across the US.
Increase the number of organizations in the Pass Provider Program and the number of sales outlets	<ol style="list-style-type: none"> 1. Add a minimum of 10 new organizations in the Pass Provider Program 2. Add 5 new sales outlets 	<ol style="list-style-type: none"> 1. 8 new organizations became part of Pass Provider Program. In addition, 4 new accounts were set up for existing organizations in the Non-Profit Program and 2 new employers started subsidizing employee passes independent of the Pass Provider Program 2. 1 new sales outlet was added
Promote ridership to organizations and communities along routes in Frequent Transit Network	Increase ridership by 5% for FTN routes as compared to FY 2016	The goal was not met. When comparing the 10 non-strike months of FY 2016 with the same months in FY 2017, FTN ridership decreased by 5.6% from FY 2016 to FY 2017. The FTN routes performed better than all routes combined, but decreased similar to transit providers across the US.

Key Objective #2:

Promote Sun Link streetcar services to maintain excitement about the new service and increase ridership

Marketing Strategies	Outcomes	Results
Through partnership with the UA, promote Sun Link and the 50% discount provided by the UA for semester and annual U-Passes	Increase in sales of semester and annual passes sold when compared to FY 2016	Sales of U-Pass were essentially the same between FY2017 and 2016. It should be noted that there had been a 14-day promotional pass and the cost of passes had been discounted by that amount in FY 2016.
	Attend a minimum of 50 community events to promote Sun Link and regional transit	Staff participated in 102 community events.
Work with the districts along the Sun Link line to strengthen support and establish additional promotions	<ul style="list-style-type: none"> • Anniversary • Summer events and concerts on Sun Link • Holiday event(s) 	<ul style="list-style-type: none"> • Secured sponsors to fund Anniversary free ride day. KXCI hosted concert on board. Ridership exceeded 4,000. • Partnership with KXCI established, and two concerts were held. • Collaborated with KXCI on "Santa on Sun Link" event. Promoted Shop Local Day on Saturday after Thanksgiving
Expand the usage of social media to promote Sun Link	Increase Facebook and Twitter followers by 10% when compared to FY 2016	Facebook followers increased by 12%, while Twitter grew by 14%. Instagram was added as a new social media tool.

Key Objective #3:

Improve passenger information and communication for all transit services to enhance the regional transit experience

Marketing Strategies	Outcomes	Results
Establish an e-Blast system for Sun Tran passengers to subscribe to	Establish the system and promote to subscribe passengers	Initialized Constant Contact account for Sun Tran and Sun Link. Sent limited numbers of e-Blasts using the new system.

Expand the use of technology	<ol style="list-style-type: none"> 1. GO Tucson and Sun Tran (Transit Now) mobile apps 2. Expand the number of Twitter and Facebook followers by 10%. 	<ol style="list-style-type: none"> 1. GoTucson Transit App split was promoted heavily in FY 2017. Launched Sun Tran (Transit Now) app and promoted to public 2. See social media numbers above
Finalize the new Sun Tran bus stop sign project	Determine funding and install new signs throughout the system	Approximately 2,200 new bus stop signs were installed, each of which includes bus routes serving this stop and the stop number. The stop number can be used in conjunction with the Sun Tran mobile app and website to determine next bus arrivals.

Key Objective #4:

Increase the use of the SunGO fare payment system to minimize the use of cash to board transit services and improve upon the ability to travel throughout the region with ease.

Marketing Strategies	Outcomes	Results
Develop marketing campaigns to educate riders on the transfer policy change and promote the SunGO system	Increased number of SunGO product users and GO Tucson mobile app users.	Multiple campaigns were run. SunGO Card usage increased by 14.0% from FY 2016 to FY 2017. GO Tucson app users increased by 213% in a 1.5 year period between February 2016 and August 2017. As of 8/23/2107, there were 10,384 GoTucson Transit App users.

Key Objective #5:

Improve internal relations throughout Sun Tran and Sun Van

Marketing Strategies	Outcomes	Results
Work with HR to develop a strategy to improve internal relations post-strike	Meet with HR staff to determine what activities might be beneficial. This could include highlighting birthdays and anniversaries, developing activities to get employees interacting with each other more.	Birthday and anniversaries were highlighted in the newsletter. Employee appreciation day was held and food was cooked at both yards. One Sun Tran Safety Meeting was held at Sun Tran and four were held at Sun Van.
Feature different employees in the employee newsletter to draw attention to the positive things various employees are doing.	Include a story in each newsletter featuring an employee or group of employees.	Pictures of various employees were included in the newsletter to draw attention to positive things employees are doing.

FY 2018 Marketing Opportunities

Sun Tran faces many exciting opportunities and challenges in FY 2018. With a three year labor contract in place for Teamster’s 104, riders are feeling more confident in Tucson transit. There are multiple opportunities to promote transit and the benefits it provides to the region:

- The Frequent Transit Network (FTN) is currently the biggest attraction for new riders to Sun Tran. The FTN was expanded in early 2017 to 11 routes offering service every 15 minutes or less between 6 a.m. – 6 p.m. Monday thru Friday. In August, Route 9 of the FTN was extended to serve Pima College West Campus.
- The new 3-Day Pass is a great option for residents and visitors to the Tucson area.
- The GoTucson Transit App was recently split off from the GoTucson Parking App in order to increase its utility. The GoTucson Transit App is seen as a key feature for visitors, millennials, UA students, Sun Link riders and 3-Day Pass users.
- The Sun Link streetcar is the newest transit option in the Tucson area, and staff will work to increase interest in the Sun Link streetcar through the co-promotion of events/activities with the five entertainment districts along the route.
- The SunGO fare payment system allows riders to travel with ease throughout the region. The recent changes in transfer policy and fares provide opportunities to continue promoting the SunGO Card.

- Upgraded bus stop signage with bus stop number and routes serving each stop are now listed for passenger convenience. The bus stop number ties into information provided on the mobile app for trip planning and next bus arrival times.
- Online “Rider Tools,” give passengers convenient access to a number of technologies to enhance their transit travel experience.
- The new fare structure and \$25 for \$20 program provide incentives to riders to load cash value onto a SunGO Card rather than pay with cash at the farebox.
- The SummerGO Pass, now a permanent pass, encourages youth to learn to use transit and to develop skills and habits for becoming lifelong transit users.

FY 2018 Goals, Objectives, Strategies and Outcomes

The Marketing Department has identified objectives and strategies to help the organization meet its goals for FY 2018. Below are the goals, objectives and strategies to reach them, expected outcomes and timelines.

Goal #1:

Promote transit services to increase awareness and ridership across all fixed route systems in region.

Objective #1:

Realize a 1% positive change in ridership trends for each of the following fixed route systems in FY 2018 compared to FY 2017 levels:

- A. Sun Tran
- B. Sun Express
- C. Sun Shuttle fixed routes

Marketing Strategies	Outcomes	Timeline
Develop and implement multimedia campaign to showcase the benefits of riding Sun Tran and promoting the Frequent Transit Network (FTN)	Measure the success through the ridership numbers each month and realize a 1% positive change in ridership trends in FY 2018 when compared to FY 2017.	FY 2018
Promote express routes to organizations and communities near the routes	Realize a 1% positive change in ridership trends for express riders when compared to FY 2017	FY 2018
Evaluate under-performing Sun Shuttle routes and develop and implement a media campaign to improve ridership in those areas	Increased ridership on the select Sun Shuttle routes when evaluating ridership prior to the campaign. Place long-term ads in select communities to keep Sun Shuttle top-of-mind.	Determine campaign time-frame with RTA.

Expand use of social media to encourage ridership	Increase the number of followers by 10% when compared to FY 2017 for Twitter, Facebook and Instagram	FY 2018
Promote pass products and programs which have the potential for increasing ridership	Increase sales of Single Boarding Fare on GoTucson Transit App, 3-Day Pass, \$25 for \$20 program, SummerGO Pass, Annual Pass and Bulk Sales Discount	FY 2018
Promote FTN to major employers, apartment communities and other organizations located on FTN routes	Realize a 1% positive change in ridership trends for FTN routes as compared to FY 2017	FY 2018
Teach passengers how to ride transit to improve the feasibility of choosing transit over driving.	Host 19 learn-to-ride events, which include refugee trainings, START and learn-to-ride for different organizations.	FY 2018
Increase the number of organizations in the Pass Provider Program and the number of sales outlets	<ol style="list-style-type: none"> 1. Add a minimum of 8 new organizations in the Pass Provider Program 2. Add 3 new sales outlets 	FY 2018
Attend community events to promote regional transit	Attend a minimum of 50 community events to promote transit	FY 2018
Expand the Speaker's Bureau program to present information on the FTN to major employers, apartments and neighborhoods along the FTN	Make a minimum of 12 presentations	FY 2018

Goal #2:

Promote Sun Link streetcar services to maintain public enthusiasm for this service and increase ridership

Objective #2:

Realize a 1% positive change in ridership trends for Sun Link in FY 2018 when compared to FY 2017:

Marketing Strategies	Outcomes	Timeline
Create and implement a multimedia campaign to promote U-Pass sales at University of Arizona for Sun Link (and Sun Tran)	Realize a 1% positive change in ridership trends for U-Pass sales of semester and annual passes by when compared to FY 2017	Jun 30, 2018
Through partnership with the UA, promote Sun Link and the 50% discount provided by the UA for semester and annual U-Passes	Post U-Pass fliers in all dorms and Cat Tran vehicles. Send marketing e-Blasts to all UA students, faculty and staff	May 2018
	Attend a minimum of 50 community events to promote Sun Link and regional transit	FY 2018
Work with the districts along the Sun Link line to strengthen support and establish additional promotions	<ul style="list-style-type: none"> Promote events such as Sun Link Anniversary, summer events and concerts on Sun Link, holiday events, Book Festival, Folk Festival, Jazz Festival, Free-Ride Days Develop Dropbox for shared use of images, videos, wording, ads and logos 	FY 2018
Develop campaigns to target primary markets for Sun Link	UA students, commuters working or living on alignment, 25-34 year olds, empty nesters, visitors, sports fans, families with young children	FY 2018
Develop Strategic Social Media Plan to promote Sun Link	Increase Facebook, Twitter and Instagram followers by 10% when compared to FY 2017	FY 2018
Establish 'Free Ride Sponsorship' program	Offer to organizations to build awareness and ridership during large-scale events	FY 2018
Create promotional video to highlight Sun Link and five districts	Utilize in campaigns to build awareness with target audiences	FY 2018
Develop partnerships with organizations for promotional opportunities	<ul style="list-style-type: none"> Roadrunners hockey 	FY 2018

Promote GoTucson Transit app and the new 3-day pass to encourage visitors and residents to ride Sun Link	Use in marketing campaigns to help build awareness with target audiences of current and potential users	FY 2018
Promote Sun Link to out-of-town visitors	Provide information to and partner with Visit Tucson, AirBnB network, conferences for out-of-town visitors, Concierge Network and hotels along streetcar route	FY 2018

Goal # 3

Expand the use of marketing and communications technology to improve passenger information and communication for transit services to enhance regional transit experience.

Objective #3:

Develop and implement each of the following digital communication activities below by June 30, 2018.

Marketing Strategies	Outcomes	Timeline
Establish an e-Blast system for Sun Tran passengers to subscribe to	Add a minimum of 75 subscribers	FY 2018
Develop marketing campaign to promote apps to existing and new riders	GoTucson Transit and Sun Tran (Transit Now) mobile apps	FY 2018
Expand social media followers	Expand the number of Twitter, Facebook and Instagram followers by 10%	FY 2018
Re-design website	Develop updated website design that is user and mobile friendly, with easy navigation and includes convenient tools. Website should also be accessible in Spanish and should be ADA accessible. Increase number of visitors and page views by 1% from FY 2017.	FY 2018
Educate public on how to use bus stop numbers for trip planning and next bus arrival times	Implementation of mini educational campaign on use of bus stop numbers.	FY 2018

Goal # 4

Increase the use of the SunGO fare payment system and GoTucson Transit App to minimize the use of cash to board transit services to speed up boarding times and to improve upon the regional transit experience.

Objective #4:

Increase the use of the SunGO fare payment system and GoTucson Transit App use by 2% each in FY 2018 over FY 2017 levels by June 30, 2018.

Marketing Strategies	Outcomes	Timeline
Develop marketing campaigns to educate riders on the transfer policy and to promote the SunGO system and GoTucson Transit App	Increase number of SunGO product users and GoTucson Transit mobile app users by 2%	Throughout FY 2018
Develop marketing campaign to promote 3-Day Pass pilot program	Measure 3-Day Pass sales and evaluate after 6 month trial to determine if program will be permanent. Achieve increased sales compared to number of 7-Day Passes sold, which totaled 2,276.	FY 2018
Promote bulk sales of SunGO products to organizations, businesses, hotels and conventions	Promote to organizations and increase number of participants	FY 2018
Promote \$25 for \$20 program to new and existing riders	Continue to implement \$25 for \$20 discount promotion	FY 2018

Goal # 5

Improve internal and external customer relations throughout Sun Tran and Sun Van

Objective #5:

Increase communications, develop morale boosting activities, create opportunities for staff interactions that strengthen relationships between all employees, and increase positive online ratings and social media engagement with external customers.

Marketing Strategies	Outcomes	Timeline
Work with HR to develop a strategy to improve internal relations with Admin staff and Teamsters	Meet with HR staff to determine what activities might be beneficial. This could include highlighting birthdays and anniversaries, developing activities to get employees interacting with each other more.	FY 2018
Feature different employees in the employee newsletter to draw attention to the positive things various employees are doing	Include a story in each newsletter, run at least quarterly, featuring an employee or group of employees	FY 2018
Increase positive reviews to improve online ratings	Receive 10 positive ratings or reviews online, like Google and Facebook	FY 2018
Develop strategies within Social Media Plan to generate positive community outreach and show a more 'personable' Sun Tran	Include 8 posts per month of driver/service compliments from passengers, highlight drivers with exceptional driving history, share positive stories, highlight improvements to rider experience, share 'behind the scenes' images and stories, show community outreach efforts	FY 2018
Use drivers, mechanics and customer service staff in marketing campaign showing friendlier side to the public, and to increase morale	Outdoor ad campaign using PSA ads on bus benches and shelters	FY 2018

Marketing Department Team

The Sun Tran marketing department currently consists of seven full-time positions, with responsibilities as listed below for Sun Tran, Sun Van, Sun Link, Sun Shuttle and Sun Shuttle Dial-a-Ride services:

Marketing & Communications Director – Manages overall departmental planning and administration, media buying, primary media spokesperson, major research studies and more.

Assistant Director of Marketing/Pass Program Manager – Assists in managing the department; manages pass product development for the SunGO fare payment system and education, including employer, college, and non-profit programs; pass sales outlet development; oversees the partnership with the University of Arizona Parking and Transportation Services Department.

Marketing & Communications Specialist – Plans, writes and distributes media releases, acts as deputy media spokesperson, produces customer publications and employee newsletters, manages website content, develops communications plans, implements communication strategies to inform internal and external customers and develops strategic marketing efforts.

Community Outreach Manager – Manages public involvement plan, special event management, community and customer outreach/education, public input processes, oversees the Sun Tran Speaker’s Bureau, conducts customer and employee surveys, START program management, LEP plan. Provides communications materials to internal and external audiences as well as social media and media relations.

Graphic Artist – Provides art and graphic design for Sun Tran, Sun Van, Sun Link and Sun Shuttle customer materials, internal communications, updates and maintains web site content, photography.

Marketing Coordinator – Assists with production of internal and external marketing and communication materials, supports social media efforts, produces customer collateral materials, ensures posted passenger information is updated and posts new information, generates daily media reports, designs marketing materials, provides event support, and handles various marketing tasks.

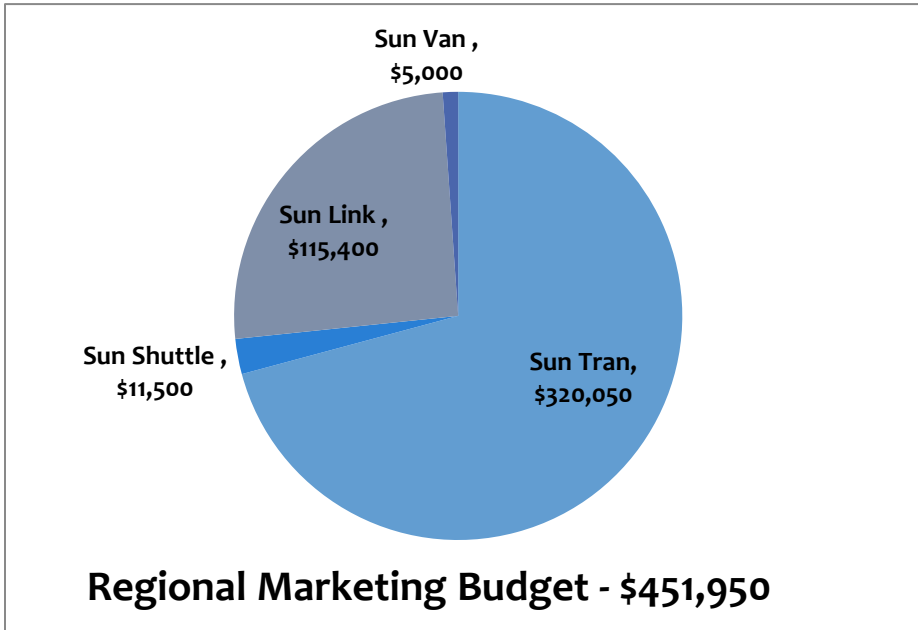
Marketing Assistant – Marketing expenditure tracking, purchase requests, bike locker sales and tracking, bus poster coordination, delivery services coordination for customer publications and various marketing tasks.

A new Director began in late FY 2017, and a new Assistant Director began in early FY 2018. In addition, a new Marketing & Communications Specialist and Marketing Assistant were also brought on in FY 2017. The recently reconfigured team provides new energy and ideas for marketing, communication and outreach for Tucson’s transit system, yet also has over 40 years of experience working in transit.

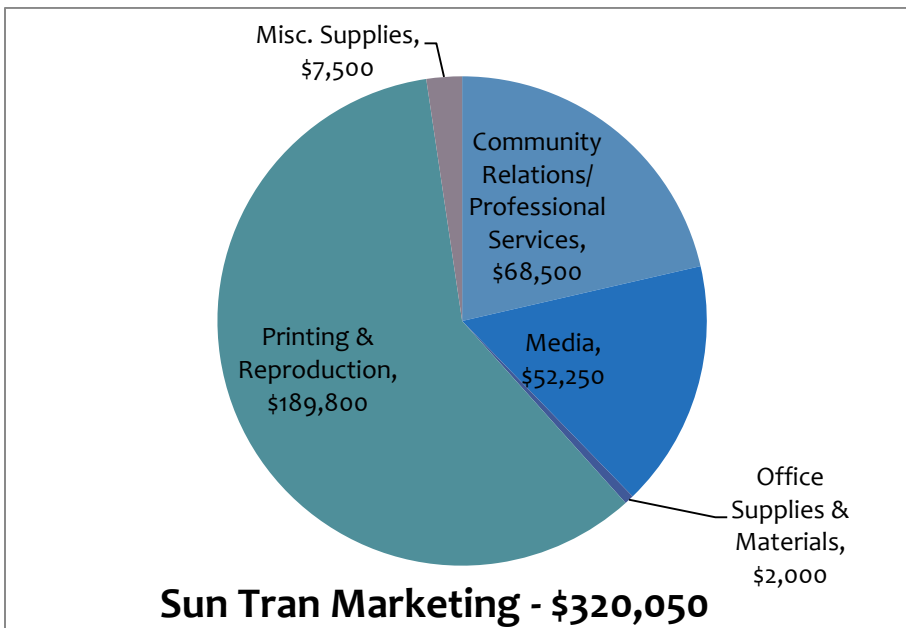
Marketing Budget & Advertising Revenues

FY 2018 base marketing budget is \$451,950 for marketing, communications and outreach activities for Sun Tran, Sun Express, Sun Van and Sun Link. \$320,050 is used for Sun Tran, \$115,400 for Sun Link and \$5,000 for Sun Van. The RTA

budgeted \$11,500 for direct marketing expenses for the promotion and marketing of Sun Shuttle, with another \$56,900 for customer service and marketing services provided by Sun Tran’s staff, which is paid to Sun Tran. All marketing expenditures directly related to Sun Shuttle are reimbursed to Sun Tran through an IGA between the City of Tucson and the RTA.



For the Sun Tran budget, over half of all funding is expended for production and distribution of rider information materials such as the Ride Guide, brochures, etc. The chart below gives an image of approximately how the marketing budget is allocated.



The remainder of the budget will be allocated for advertising, events and other public relations efforts to help increase ridership and revenue, as well as improve passenger information. Advertising agency assistance may be required to implement the necessary campaigns to promote each transit service and the region as a whole.

Advertising Revenues

The City of Tucson extended the contract with Lamar Transit Advertising to manage the sales of internal and external advertising on Sun Tran and the Sun Link streetcar through 2020. Advertising revenues are generated from the following:

- Sun Tran Interior Ads – posters and Michelangelo ads
- Sun Tran Exterior Ads – a variety of advertising wraps
- Sun Link Interior Ads – Privacy panel ads and a few other select locations
- Sun Link Exterior Ads – a variety of advertising wraps
- Sun Link Stop Ads – Advertising in the framed 57” x 46” panel at each stop (could be sold once naming rights contract is established and stop ads are made available for sale by the City of Tucson)

Additional advertising projects with community partners by the marketing team could generate additional revenues. Those specific projects are still to be determined. Per the contract with Lamar, there are guaranteed revenues that the City receives for advertising, which is listed in the first chart and the expected amount to be received for FY 2018 for both Sun Tran and Sun Link.

