

# HART Community Sentiment Study

Conducted by HCP on Behalf of the  
Hillsborough Area Regional Transit Authority



Finance and Audit Committee Meeting  
October 15, 2018



# Purpose

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HCP was brought in to help the organization understand **how the community perceives HART** and their efforts.



HCP utilized a **mixed-methodology approach** providing HART with both qualitative and quantitative data from their stakeholders—the Hillsborough County community.



HART will use the data as a benchmark for the development **communication strategies, setting goals, and tracking organizational changes** over a three-year period.

# Phase I: *Secondary Research*

- Success Plan
- Annual Report
- HOPS
- Mission
- Vision
- Industry Reports

# Basis for Our Work



## HART Mission

*HART takes people to the places that enhance their lives.*



## HART Vision

*HART invites, inspires, and implements sustainable and innovative transportation.*





## **Phase II:** *Stakeholder Research*

- May-June 2018
- 38 Stakeholders
- Top-of-Mind Associations
- Expectations
- Limiting Factors
- Requests
- Framed Content for Community-Wide Study

# Stakeholder Findings



Stakeholders have a **limited view of HART** beyond “bus”



Stakeholders recommend substantially **greater leadership and organization visibility**



Stakeholders are **unclear on the organization’s intended target**



Stakeholder **lack of experience** using public transit locally breeds fear of not knowing how to begin



Stakeholders call for **greater community involvement** by HART



Stakeholders **want to see the data** that drives decisions



Stakeholders have **limited knowledge** of HART programs



Stakeholders identified a **lack of broad appreciation** for the urgent need for additional funding



Stakeholders **want leadership by example** from HART board, leadership, staff

## Phase III: *Community Survey*

- July 2018
- 469 Hillsborough County Respondents
- Online Survey
- 8 Minutes on Average
- Representative Response from All County Regions to Truly Capture Community Sentiment
- $\pm 4.9\%$  Margin of Error

Top-of-Mind  
Perceptions





## Sources of Info

*What has helped shape what you  
know about the organization?*

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**43%** Word of Mouth

**43%** Personal Experience

**34%** Experiences Shared by Peers

**33%** Web or News Articles

**28%** Social Media

**11%** Elected Officials

**9%** Other

Typical  
User  
Perceptions

General Negative Comment  
Don't Know  
Impoverished  
Working Class  
Special needs  
No Personal Vehicle  
Students  
Blue Collar  
Handicapped  
Poor  
Never Used

# Catering to Populations

*How well does HART cater to the following populations?*



**74%** Residents without a personal vehicle



**69%** Commuters



**68%** Students



**66%** Disabled



**65%** Bike-Riders



**65%** Veterans



**64%** Elderly



**57%** Visitors/Tourists

# HART Fulfilling Expectations

## Strongest Fulfillment



Provide  
Reliable Public  
Transportation

75%



Connect  
People and  
Places

72%



Cater to Those  
w/o Personal  
Vehicle Access

71%



Offer Affordable  
Transportation  
Options

70%



Get Riders to  
Destinations in  
Timely Manner

67%

## Weakest Fulfillment



Create Safe  
Places for  
Riders to Wait

58%



Good Steward  
of Public  
Dollars

58%



Offer  
Reasonable  
Wait Times

60%



Cater to Needs  
of Whole  
Community

60%



Offer  
Variety of  
Modes

60%



# Service Familiarity: *Percentage Unaware of Service*



**54%** Flamingo Fares



**33%** HARTFlex



**20%** HARTPlus



**53%** Travel Training Program



**31%** Express and Limited Express Service



**19%** Airport Service



**51%** One Bus Away



**28%** WiFi on Buses



**8%** Park and Ride Lots



**40%** Compressed Natural Gas (GNG) Fleet



**27%** TECO Line Streetcar



**7%** HART Bus Service



**36%** Metro Rapid



**24%** Yellow Cab Alternative to Paratransit Service

## Interest in New

*How likely are you to use each of the following?*

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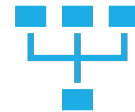
**56%** Major Stadium, Ballpark or Event Shuttle



**55%** Airport Service



**46%** Services to Pinellas County Beaches



**45%** Connector to Other Transit Options (*Megabus, train, etc.*)



**41%** Commuter Service

# HART Associations

*How strongly do you associate HART with the following using a scale of 1-7?*

**Attribute**

**Mean**

Transportation Provider

5.46

Economical Alternative to Personal Vehicles

5.12

Parking Alleviator

4.94

Economic Driver

4.85

Matching Community Need with Relevant Services

4.83

Traffic Congestion Alleviator

4.76

Safer Alternative to Personal Vehicles

4.74

Source of Innovative Transportation Solutions

4.71

Integrator of New Technology into its Services

4.55

Resource for Crowd Control During Events

4.52

# Looking Ahead



**30%**

Not familiar with any  
non-bus service named



**33%**

Do not have knowledge  
of HART funding



**35%**

Believe the organization  
is under-funded



**69%**

Agree HART delivers value  
to Hillsborough County



**87%**

Believe HART can provide  
the transportation  
solutions for the future



# Summary Observations

## *Overarching Observations*

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HART's Identity as a Transit Organization is **Strong**

Association Beyond Bus Service is **Weak**

**Low Levels** of Program and Service Knowledge

Widespread Potential User **Confusion**

Perception of HART as Solely **Non-Choice Option**

**Leaders Not Engaged** with Services

Community Outreach is **Weak**

**and...**

***Study data will become basis of future scorecard metrics***