TriMet Attitude and Awareness Survey

November 2014
Methodology

Telephone survey of 1,000 residents

• Conducted November 13 – 18, 2014

• Quotas for age and gender in each county for representative sample

• Margin of error +/- 3.1%, at 95% confidence level
TriMet positives up from 2013

Public is more optimistic

- Increasing levels of optimism in the region
- Less worry about jobs and the economy
- This will continue

Adding to favorability

- Improved service
- Infrastructure
- Contract
# Highlights

<table>
<thead>
<tr>
<th>Category</th>
<th>2014</th>
<th>2013</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approval of the job TriMet is doing</td>
<td>76%</td>
<td>66%</td>
<td>71%</td>
</tr>
<tr>
<td>Approval of Bus system</td>
<td>78%</td>
<td>65%</td>
<td>74%</td>
</tr>
<tr>
<td>Approval of MAX</td>
<td>84%</td>
<td>69%</td>
<td>79%</td>
</tr>
<tr>
<td>Perception that buses are safe</td>
<td>76%</td>
<td>67%</td>
<td>65%</td>
</tr>
<tr>
<td>Perception that MAX is safe</td>
<td>79%</td>
<td>68%</td>
<td>71%</td>
</tr>
<tr>
<td>TriMet riders’ satisfaction with their overall experience</td>
<td>87%</td>
<td>81%</td>
<td>83%</td>
</tr>
<tr>
<td>Adults in the region who rode TriMet at least once last year</td>
<td>80%</td>
<td>74%</td>
<td>80%</td>
</tr>
</tbody>
</table>
Customers’ State of Mind
Gap between right direction and wrong track consistent with 2013

Right Direction/Wrong Track for Region

Right Direction

Wrong Track


68% 66% 51% 45% 46% 55% 62% 67% 62% 48% 60% 60%

20% 20% 34% 39% 33% 32% 24% 22% 26% 37% 25% 27%
Approvals
Approval of TriMet up significantly from 2013

**Approvals**
- **Overall job**
- **Bus system**
- **MAX system**

2007: 77%
2008: 77%
2009: 71%
2010: 71%
2013: 66%
2014: 84%

Safety
Approval of safe operations up 10-points from 2013

Approval of Safe Operations of MAX and Buses

<table>
<thead>
<tr>
<th></th>
<th>2010</th>
<th>2013</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bus</td>
<td>65%</td>
<td>67%</td>
<td>76%</td>
</tr>
<tr>
<td>MAX</td>
<td>71%</td>
<td>68%</td>
<td>79%</td>
</tr>
</tbody>
</table>
Have personal safety concerns ever prevented you from taking TriMet MAX trains?

No: 78%, 75%, 78%, 84%, 75%, 77%
Yes: 21%, 25%, 21%, 14%, 24%, 22%

Reliability
Reliability is viewed positively

Service Reliability

- Bus: 5.5
- MAX: 5.8

Scale midpoint
Ridership
Eight in ten adults in the region ride TriMet

Percent of Adults who Ride TriMet

All riders

Occasional, Regular, Frequent (at least 2 times /month)
Two in ten respondents ride TriMet several times a week or more

2014 Ridership Frequency

- **Frequent Rider**: Ride almost every day
- **Regular Rider**: Ride several times a week
- **Occasional rider**: Ride a couple of times a month
- **Infrequent rider**: Ride less than once a month
- **Non-rider**: Never ride TriMet

2013 Ridership Frequency
Non-Riders value TriMet

Do you value the benefits of TriMet?

- Yes: 84%
- No: 11%
- Maybe: 4%
- DK: 1%

Why do you say that? (multiple responses accepted; Top mentions)

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provides a form of transportation</td>
<td>52%</td>
</tr>
<tr>
<td>Family/friend use TriMet</td>
<td>15%</td>
</tr>
<tr>
<td>Reduces traffic congestion</td>
<td>14%</td>
</tr>
<tr>
<td>Reliable/it’s there when you need it</td>
<td>9%</td>
</tr>
<tr>
<td>Benefits many</td>
<td>8%</td>
</tr>
<tr>
<td>Economical</td>
<td>4%</td>
</tr>
</tbody>
</table>

Of those who said Yes n=167
Frequent riders use TriMet for work
Infrequent riders use TriMet for recreation

All Trips

Frequent/Regular Riders

- Recreation: 55%
- Personal business: 53%
- Go to airport: 40%
- Shopping: 42%
- Work: 67%
- Visit friends/family: 39%
- Medical appointments: 35%
- School: 33%

Occasional/Infrequent Riders

- Recreation: 68%
- Personal business: 39%
- Go to airport: 41%
- Shopping: 38%
- Work: 22%
- Visit friends/family: 20%
- Medical appointments: 13%
- School: 12%
Frequent riders are most likely to be Transit Dependent

Reasons for Riding TriMet

- **All riders**: 78%
  - Transit dependent: 22%
  - Choice: 84%

- **Freq+Reg**: 60%
  - Transit dependent: 40%
  - Choice: 60%

- **Occ+Infreq**: 84%
  - Transit dependent: 16%
  - Choice: 84%
Rider satisfaction up

Satisfaction

<table>
<thead>
<tr>
<th>Year</th>
<th>Somewhat satisfied</th>
<th>Very satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>2007</td>
<td>41%</td>
<td></td>
</tr>
<tr>
<td>2008</td>
<td>42%</td>
<td></td>
</tr>
<tr>
<td>2009</td>
<td>38%</td>
<td>46%</td>
</tr>
<tr>
<td>2010</td>
<td>35%</td>
<td>47%</td>
</tr>
<tr>
<td>2013</td>
<td>33%</td>
<td>49%</td>
</tr>
<tr>
<td>2014</td>
<td>40%</td>
<td>47%</td>
</tr>
</tbody>
</table>
Fares
Frequent riders are more likely to be satisfied with the value of transit services

Value for Fare Paid

- **All riders**
  - Don't know: 4%
  - Poor: 27%
  - Fair: 40%
  - Good: 27%
  - Excellent: 2%

- **Freq/Reg**
  - Don't know: 2%
  - Poor: 21%
  - Fair: 36%
  - Good: 39%
  - Excellent: 5%

- **Occ/Infreq**
  - Don't know: 5%
  - Poor: 29%
  - Fair: 42%
  - Good: 24%
  - Excellent: 65%
Project Awareness
Eight in ten respondents are aware of the Portland-Milwaukie Light Rail project

Awareness of Portland-Milwaukie Light Rail

- 2007: 47%
- 2008: 55%
- 2009: 53%
- 2010: 71%
- 2013: 78%
- 2014: 80%
Most made positive comments about the PMLR project

<table>
<thead>
<tr>
<th>Response Category (Multiple responses accepted)</th>
<th>Total n=801</th>
<th>Rider n=649</th>
<th>Non-Rider n=152</th>
</tr>
</thead>
<tbody>
<tr>
<td>Positive</td>
<td>79%</td>
<td>82%</td>
<td>64%</td>
</tr>
<tr>
<td>Reduces traffic congestion</td>
<td>22%</td>
<td>22%</td>
<td>20%</td>
</tr>
<tr>
<td>Provides a form of transportation</td>
<td>15%</td>
<td>15%</td>
<td>15%</td>
</tr>
<tr>
<td>Connecting parts of the City</td>
<td>13%</td>
<td>14%</td>
<td>9%</td>
</tr>
<tr>
<td>Expands public transportation</td>
<td>9%</td>
<td>9%</td>
<td>7%</td>
</tr>
<tr>
<td>Direct line to Milwaukie</td>
<td>8%</td>
<td>8%</td>
<td>7%</td>
</tr>
<tr>
<td>More accessibility</td>
<td>7%</td>
<td>8%</td>
<td>3%</td>
</tr>
<tr>
<td>Faster travel time</td>
<td>6%</td>
<td>5%</td>
<td>8%</td>
</tr>
<tr>
<td>Making commuting easier</td>
<td>6%</td>
<td>6%</td>
<td>4%</td>
</tr>
<tr>
<td>Access to downtown</td>
<td>5%</td>
<td>6%</td>
<td>4%</td>
</tr>
<tr>
<td>Increase the number of people using public transportation</td>
<td>4%</td>
<td>4%</td>
<td>1%</td>
</tr>
<tr>
<td>All other positive responses</td>
<td>3% or less</td>
<td>4% or less</td>
<td>4% or less</td>
</tr>
</tbody>
</table>
Benefits of the Tilikum Crossing Bridge are a reduction in traffic congestion and providing an easily accessible pedestrian bridge.

<table>
<thead>
<tr>
<th>Response Category</th>
<th>Total n=780</th>
<th>Rider n=638</th>
<th>Non-Rider n=142</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reduces traffic congestion</td>
<td>18%</td>
<td>18%</td>
<td>14%</td>
</tr>
<tr>
<td>Pedestrian bridge/crossing</td>
<td>16%</td>
<td>18%</td>
<td>9%</td>
</tr>
<tr>
<td>Bike friendly bridge/bicycle crossing</td>
<td>13%</td>
<td>14%</td>
<td>8%</td>
</tr>
<tr>
<td>Transportation across the river</td>
<td>9%</td>
<td>8%</td>
<td>11%</td>
</tr>
<tr>
<td>Connects parts of the city together</td>
<td>8%</td>
<td>9%</td>
<td>3%</td>
</tr>
<tr>
<td>Provides the MAX Rail a dedicated line</td>
<td>7%</td>
<td>8%</td>
<td>3%</td>
</tr>
<tr>
<td>Looks nice/beautiful/cool</td>
<td>6%</td>
<td>7%</td>
<td>4%</td>
</tr>
<tr>
<td>No cars are allowed to drive on the new bridge</td>
<td>6%</td>
<td>6%</td>
<td>7%</td>
</tr>
<tr>
<td>Faster crossing</td>
<td>6%</td>
<td>6%</td>
<td>7%</td>
</tr>
<tr>
<td>Easy access across the bridge</td>
<td>5%</td>
<td>5%</td>
<td>4%</td>
</tr>
<tr>
<td>Safe route across the bridge</td>
<td>4%</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>More access throughout the city</td>
<td>4%</td>
<td>4%</td>
<td>1%</td>
</tr>
<tr>
<td>Other</td>
<td>3% or less</td>
<td>3% or less</td>
<td>5% or less</td>
</tr>
<tr>
<td>None/nothing</td>
<td>5%</td>
<td>4%</td>
<td>7%</td>
</tr>
<tr>
<td>Don’t know/Refused</td>
<td>12%</td>
<td>12%</td>
<td>13%</td>
</tr>
</tbody>
</table>
Rider/Non-rider Demographics

Survey reflects American Community Survey demographics for:

- County
- Age
- Gender
Q&A