TriMet Attitude & Awareness Survey

November 2016
Methodology

- Telephone survey of 800 residents in TriMet service district
  - Clackamas County N=183
  - Multnomah County N=369
  - Washington County N=248
- Conducted November 9 to 17, 2016; took approximately 20 minutes to complete
- Quotas by age, gender, and county to ensure representative sample
- Margin of error ±3.5% at 95% confidence interval
Key takeaways

**Approval of TriMet remains high**: 80% approve of the job TriMet is doing, up 8 points from 2015

**Bus and MAX are seen as reliable**: On a scale of 1 to 7, where 4 would be the midpoint, MAX is given a reliability rating of 5.8; the bus system given a rating of 5.5

**Convenience is a core aspect of service**
- 24% of people riding TriMet more than a year ago do so because of convenience
- 46% of people riding less are using other modes instead and one of the reasons is that public transit is less convenient
Public mood
Fewer than half think the Portland Metro area is headed in the right direction

*A&A conducted in November 2016
Road expansion and congestion top residents’ transportation concerns

Thinking about transportation in the Portland area, what is the one major problem you would like to see improved?

27% Expand roads/more capacity

22% Traffic, congestion, overcrowding

13% Public transportation
12% Road repair, maintenance, potholes
  8% Safety
  5% More bike lanes
  3% Sidewalks
Approvals & Satisfaction
TriMet approval remains strong: overall job approval is at highest level since 2008

- TriMet job approval: 77% (2007), 80% (2008), 77% (2009), 71% (2010), 66% (2013), 84% (2014), 82% (2015), 80% (2016)
- Bus approval: 77% (2007), 80% (2008), 77% (2009), 71% (2010), 66% (2013), 84% (2014), 82% (2015), 80% (2016)
- MAX approval
8 in 10 approve of the job TriMet is doing; more than 4 in 10 strongly approve

- 2013: 34% Strongly approve, 9% Somewhat approve, 33% Don't know
- 2014: 36% Strongly approve, 9% Somewhat approve, 40% Don't know
- 2015: 27% Strongly approve, 8% Somewhat approve, 44% Don't know
- 2016: 47% Strongly approve, 7% Somewhat approve, 32% Don't know

Strongly approve: 80%
Somewhat approve: 66%
Don't know: 36%

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People identify more frequent service, or expansion of service, as areas to improve

What is the one thing TriMet could do to increase your approval rating? (Top mentions)

20% Improve service on routes
19% Expand routes
15% Nothing—like TriMet
  9% Reduce fares
  7% Safety
  4% Barriers to transit
  3% Budget, financial, make profitable
More than 7 in 10 approve of the TriMet bus system
More than 8 in 10 approve of the MAX light rail system

<table>
<thead>
<tr>
<th>Year</th>
<th>Strongly approve</th>
<th>Somewhat approve</th>
<th>Somewhat disapprove</th>
<th>Strongly disapprove</th>
<th>Don’t know</th>
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<tbody>
<tr>
<td>2013</td>
<td>46%</td>
<td>23%</td>
<td>12%</td>
<td>7%</td>
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<td>2014</td>
<td>55%</td>
<td>29%</td>
<td>9%</td>
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<td>11%</td>
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<tr>
<td>2015</td>
<td>53%</td>
<td>27%</td>
<td>6%</td>
<td>7%</td>
<td>12%</td>
</tr>
<tr>
<td>2016</td>
<td>55%</td>
<td>27%</td>
<td>6%</td>
<td>5%</td>
<td>10%</td>
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More than 8 in 10 riders are satisfied with their experience on TriMet
Safety
More than 4 in 10 strongly approve of TriMet’s safe operation of vehicles

### Bus Operation

- Total approve: 75%
- Strongly approve: 47%
- Somewhat approve: 27%
- Somewhat disapprove: 8%
- Strongly disapprove: 4%
- Don’t know: 14%

### MAX Operation

- Total approve: 78%
- Strongly approve: 49%
- Somewhat approve: 29%
- Somewhat disapprove: 6%
- Strongly disapprove: 5%
- Don’t know: 11%
Reliability
Bus and MAX are seen as reliable

**Bus Reliability**

- 2014: 81%
- 2015: 75%
- 2016: 76%

**MAX Reliability**

- 2014: 88%
- 2015: 82%
- 2016: 82%
Ridership
18% ride TriMet several times a week or more

- 27% Nonrider
- 34% Infrequent
- 21% Regular
- 10% Occasional
- 8% Frequent
Frequent/regular riders are more often transit dependent

- **All riders**
  - Transit dependent: 15%
  - Choice: 77%
  - Don’t know: 8%

- **Frequent/Regular riders**
  - Transit dependent: 33%
  - Choice: 66%
  - Don’t know: 8%

- **Infrequent/Occasional riders**
  - Transit dependent: 8%
  - Choice: 80%
  - Don’t know: 8%
Transportation choices
6 in 10 ride TriMet the same amount as a year ago

Ridership Today Compared to Last Year

- The same: 63%
- Less: 22%
- More: 12%
People ride more for convenience or because of life changes

Why are you riding more? (Top mentions)

36% Lifestyle changes
26% Convenience and comfort

16% Like TriMet
12% Dislike driving
12% Cost
5% Transit dependent
4% Health
4% Service routes, positive

Using TriMet more for:
- Work (52%)
- Recreation (34%)
- School (24%)
- Personal business (19%)
People riding less find a car more convenient or have had lifestyle changes.

Why are you riding less? (Top Mentions)

- **46%** Use other modes instead, transit less convenient
- **27%** Lifestyle changes
  - 13% Service routes issues
  - 12% Barriers to use
  - 11% Safety
  - 2% Cost

Types of trips decreased:
- Work (39%)
- Recreation (28%)
- Shopping (17%)
- Personal business (17%)
Car trips replace public transit trips for those riding less

Types of Transportation Replacing TriMet

- Car: 85%
- Someone drives me: 10%
- Uber/Lyft/taxi: 6%
- Walk: 5%
- Bike: 2%
- Telecommute: 1%
- Carpool: 1%
Frequent riders who changed habits were equally likely to become Regular, Occasional, or Infrequent riders

Where 2015 Frequent Riders Moved To:

- Nonrider: 5%
- Infrequent: 13%
- Occasional: 15%
- Regular: 15%
Project awareness
Hop Fastpass awareness has doubled from last year

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<th>Awareness</th>
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<tbody>
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<td>13%</td>
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<tr>
<td>2016</td>
<td>28%</td>
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Q & A