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:
  - 2000: 68%
  - 2001: 66%
  - 2002: 51%
  - 2003: 45%
  - 2004: 46%
  - 2005: 55%
  - 2006: 62%
  - 2007: 67%
  - 2008: 62%
  - 2009: 48%
  - 2010: 60%
  - 2013: 60%
  - 2014: 60%

- Wrong Track:
  - 2000: 20%
  - 2001: 20%
  - 2002: 34%
  - 2003: 39%
  - 2004: 33%
  - 2005: 32%
  - 2006: 24%
  - 2007: 22%
  - 2008: 26%
  - 2009: 25%
  - 2010: 27%
  - 2013: 25%
  - 2014: 27%

Approvals
Approval of TriMet up significantly from 2013

Approvals

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

Yearly approval percentages:

- **2007:**
  - Overall job: 79%
  - Bus system: 83%
  - MAX system: 85%

- **2008:**
  - Overall job: 77%
  - Bus system: 77%
  - MAX system: 80%

- **2009:**
  - Overall job: 71%
  - Bus system: 76%
  - MAX system: 81%

- **2010:**
  - Overall job: 71%
  - Bus system: 74%
  - MAX system: 79%

- **2013:**
  - Overall job: 66%
  - Bus system: 65%
  - MAX system: 69%

- **2014:**
  - Overall job: 76%
  - Bus system: 78%
  - MAX system: 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**
  - 2007: 78%
  - 2008: 75%
  - 2009: 78%
  - 2010: 84%
  - 2013: 75%
  - 2014: 77%

- **Yes**
  - 2007: 21%
  - 2008: 25%
  - 2009: 21%
  - 2010: 14%
  - 2013: 24%
  - 2014: 22%
Reliability
Reliability is viewed positively

Service Reliability

- **Bus**: 5.5
- **MAX**: 5.8

Scale Midpoint

Not at all reliable  Very reliable
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-rider**: 26%
- **Regular**: 12%
- **Frequent**: 9%
- **Occasional**: 19%
- **Infrequent**: 33%
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>Benefit</th>
<th>Of those who said Yes n=167</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>
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

<table>
<thead>
<tr>
<th>Category</th>
<th>Transit Dependent</th>
<th>Choice</th>
</tr>
</thead>
<tbody>
<tr>
<td>All riders</td>
<td>22%</td>
<td>78%</td>
</tr>
<tr>
<td>Freq+Reg</td>
<td>40%</td>
<td>60%</td>
</tr>
<tr>
<td>Occ+Infreq</td>
<td>16%</td>
<td>84%</td>
</tr>
</tbody>
</table>
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>43%</td>
</tr>
<tr>
<td>2008</td>
<td>42%</td>
<td>44%</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>

84% 86% 83% 83% 81% 87%
Fares
Frequent riders are more likely to be satisfied with the value of transit services

Value for Fare Paid

<table>
<thead>
<tr>
<th>Category</th>
<th>Don't know</th>
<th>Poor</th>
<th>Fair</th>
<th>Good</th>
<th>Excellent</th>
</tr>
</thead>
<tbody>
<tr>
<td>All riders</td>
<td>4%</td>
<td>27%</td>
<td>40%</td>
<td>27%</td>
<td>5%</td>
</tr>
<tr>
<td>Freq/Reg</td>
<td>2%</td>
<td>21%</td>
<td>36%</td>
<td>39%</td>
<td>4%</td>
</tr>
<tr>
<td>Occ/Infreq</td>
<td>5%</td>
<td>29%</td>
<td>42%</td>
<td>24%</td>
<td>7%</td>
</tr>
</tbody>
</table>

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