



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 $\pm 3.5\%$ 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

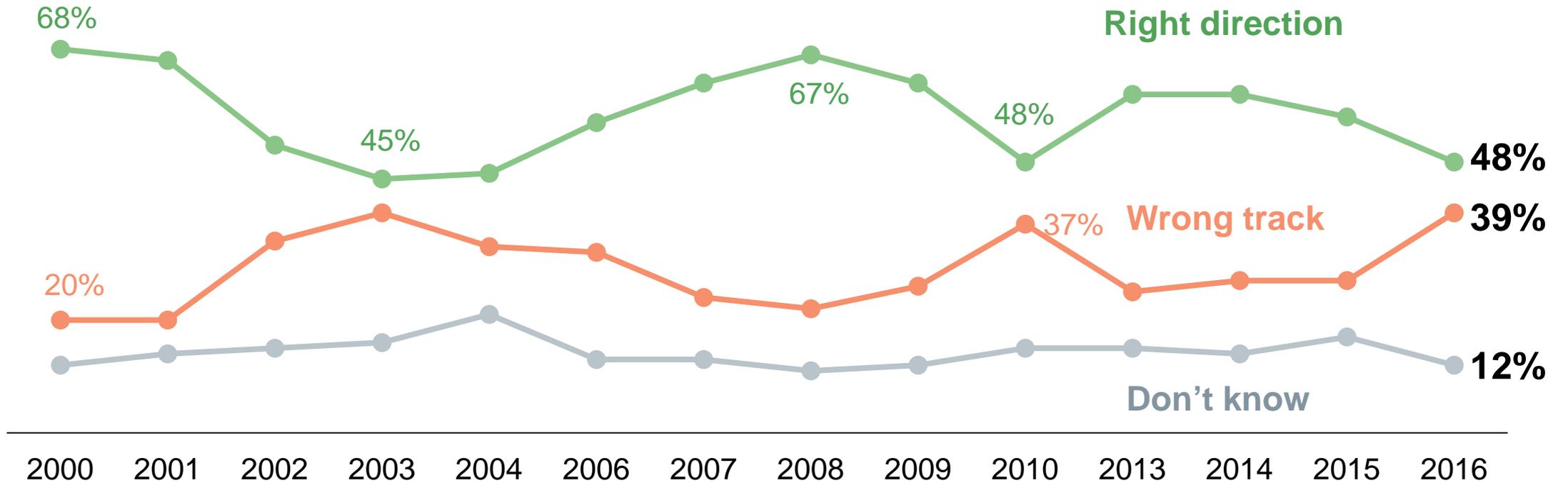
Convenience is a core aspect of service

- 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

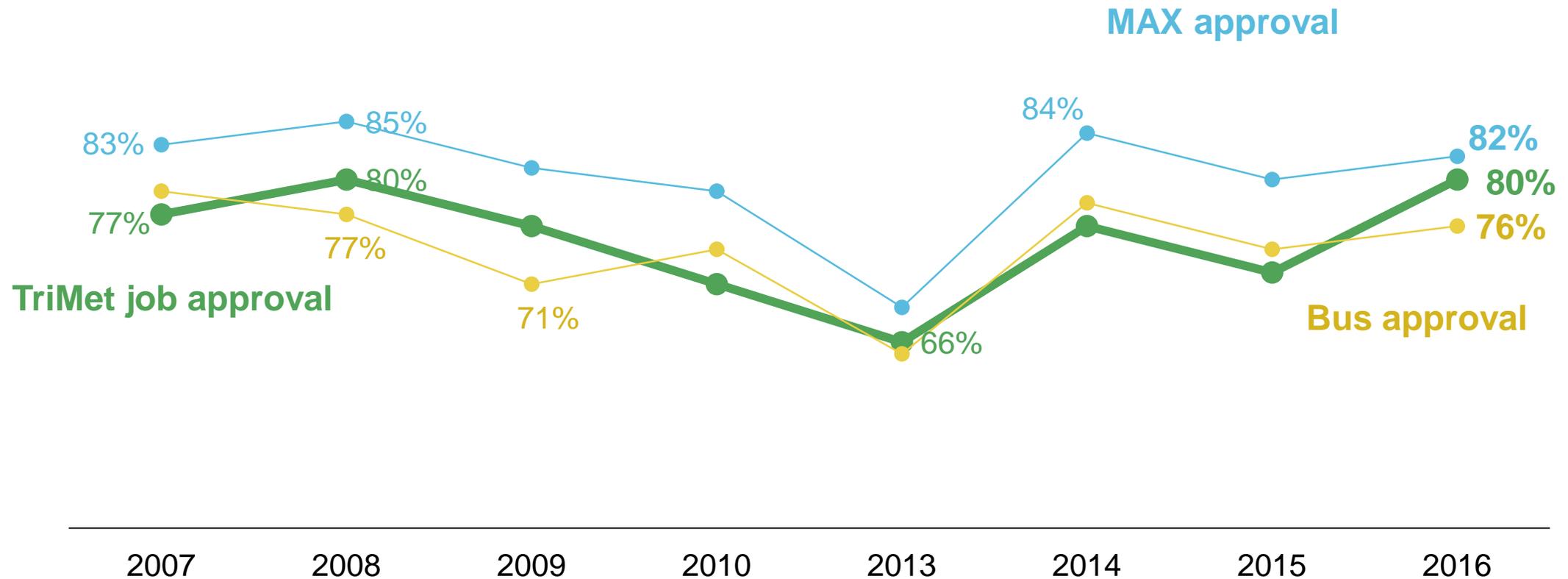
Thinking about transportation in the Portland area, what is the one major problem you would like to see improved?

- 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



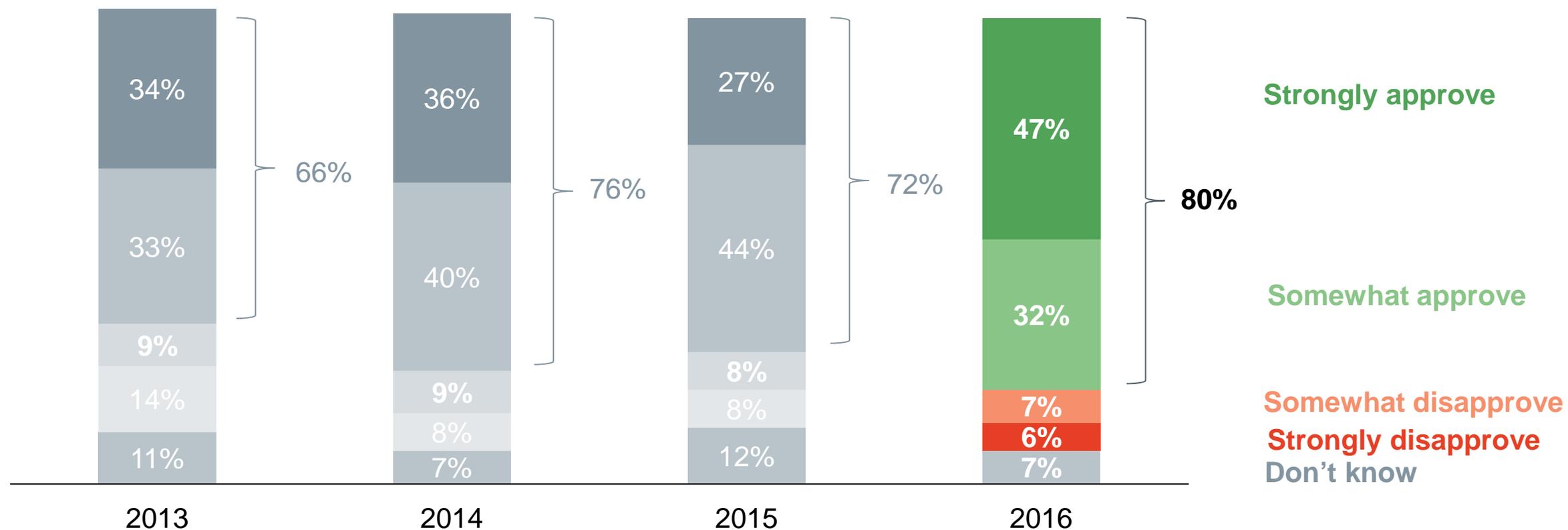
Approvals & Satisfaction

TriMet approval remains strong: overall job approval is at highest level since 2008





8 in 10 approve of the job TriMet is doing; more than 4 in 10 strongly approve





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

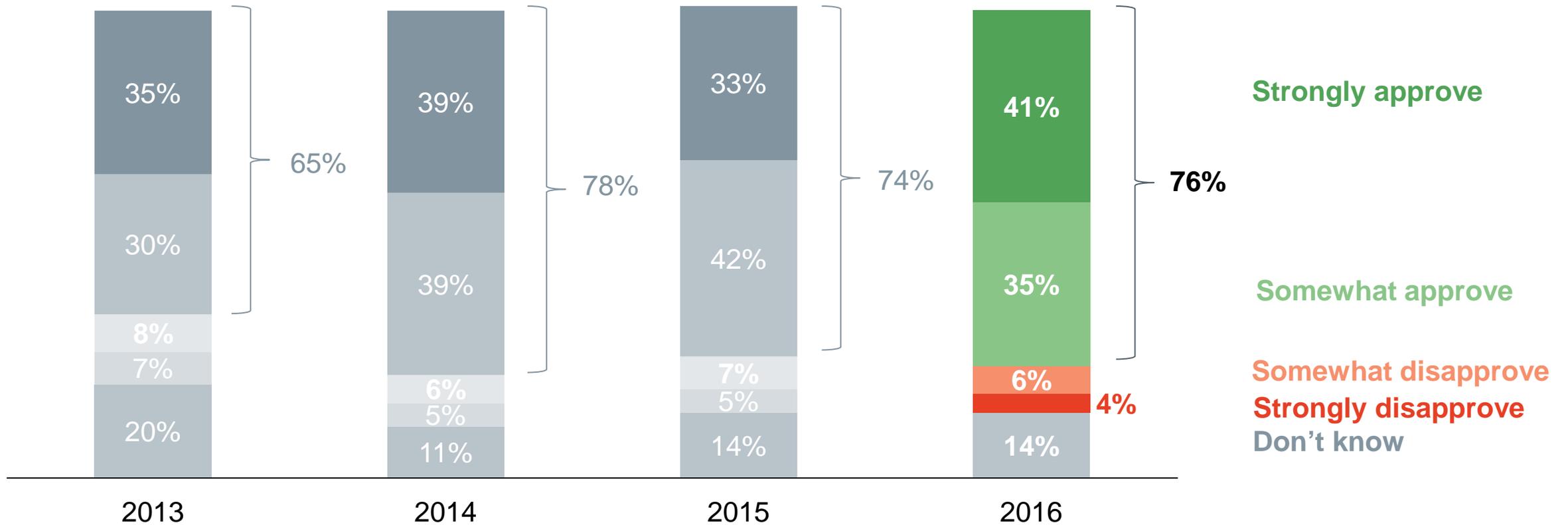
7% Safety

4% Barriers to transit

3% Budget, financial, make profitable

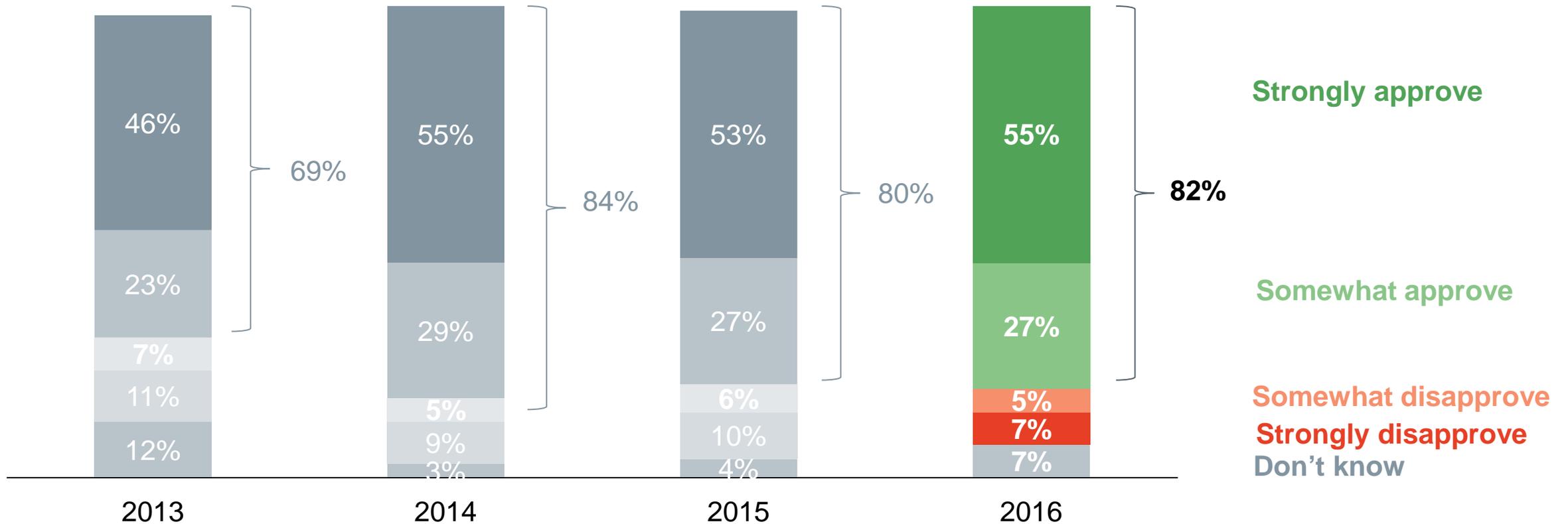


More than 7 in 10 approve of the TriMet bus system



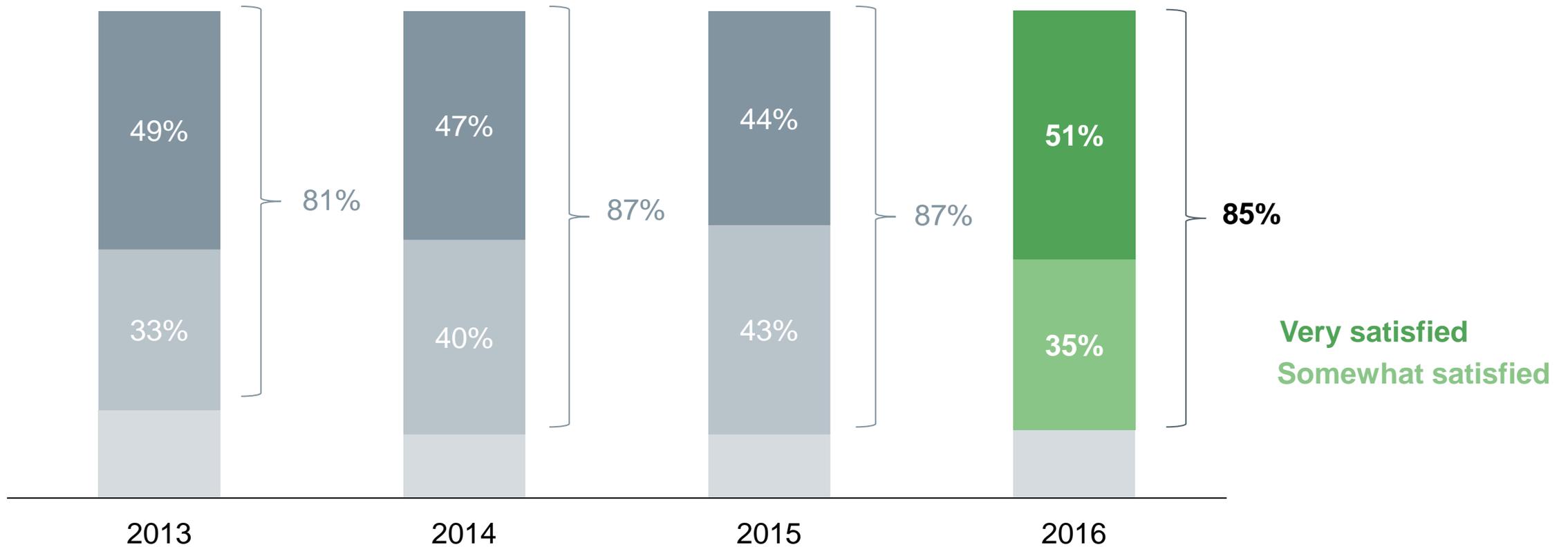


More than 8 in 10 approve of the MAX light rail system





More than 8 in 10 riders are satisfied with their experience on TriMet



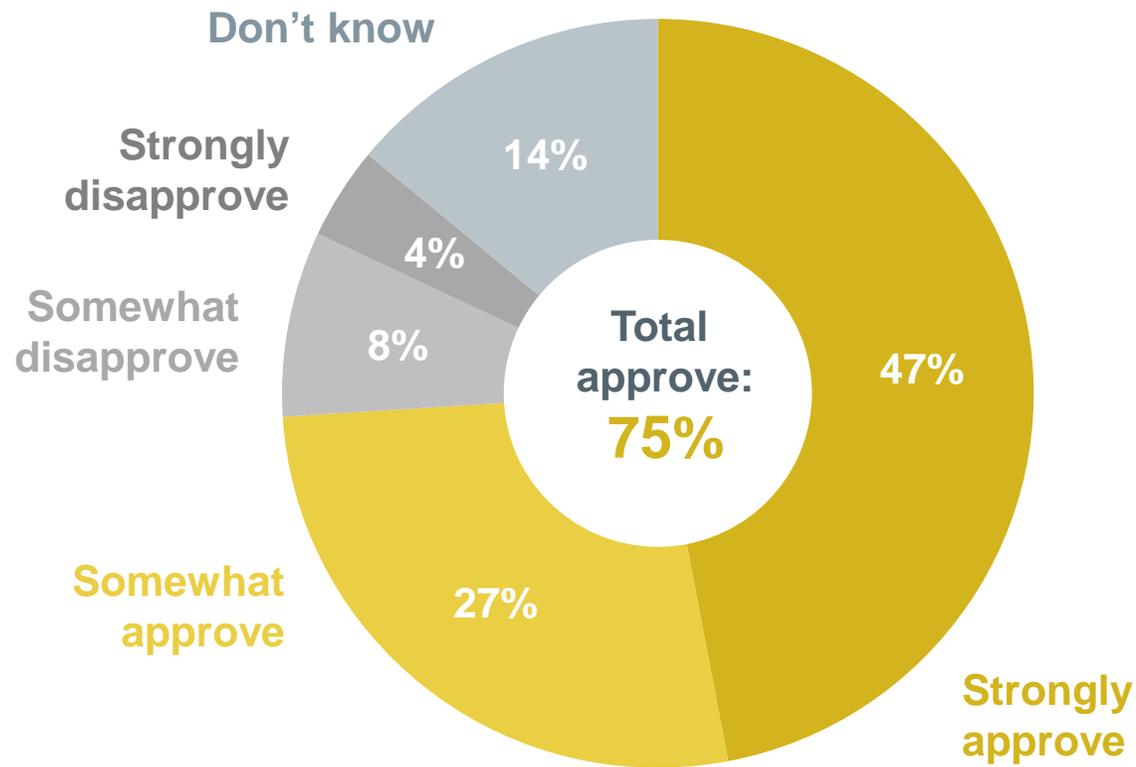


Safety

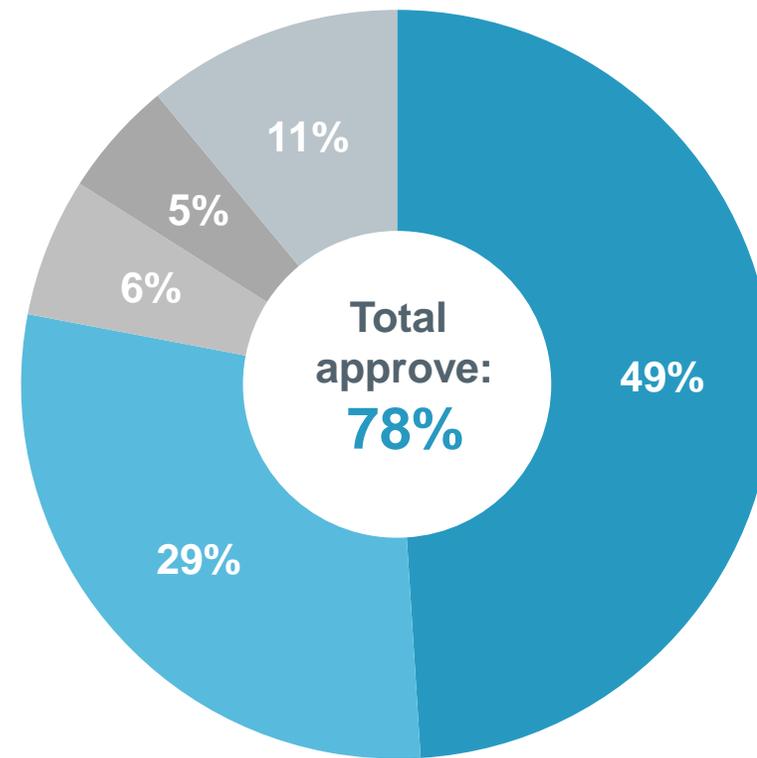


More than 4 in 10 strongly approve of TriMet's safe operation of vehicles

Bus Operation



MAX Operation





Reliability



Bus and MAX are seen as reliable

Bus Reliability



2014 2015 2016

MAX Reliability



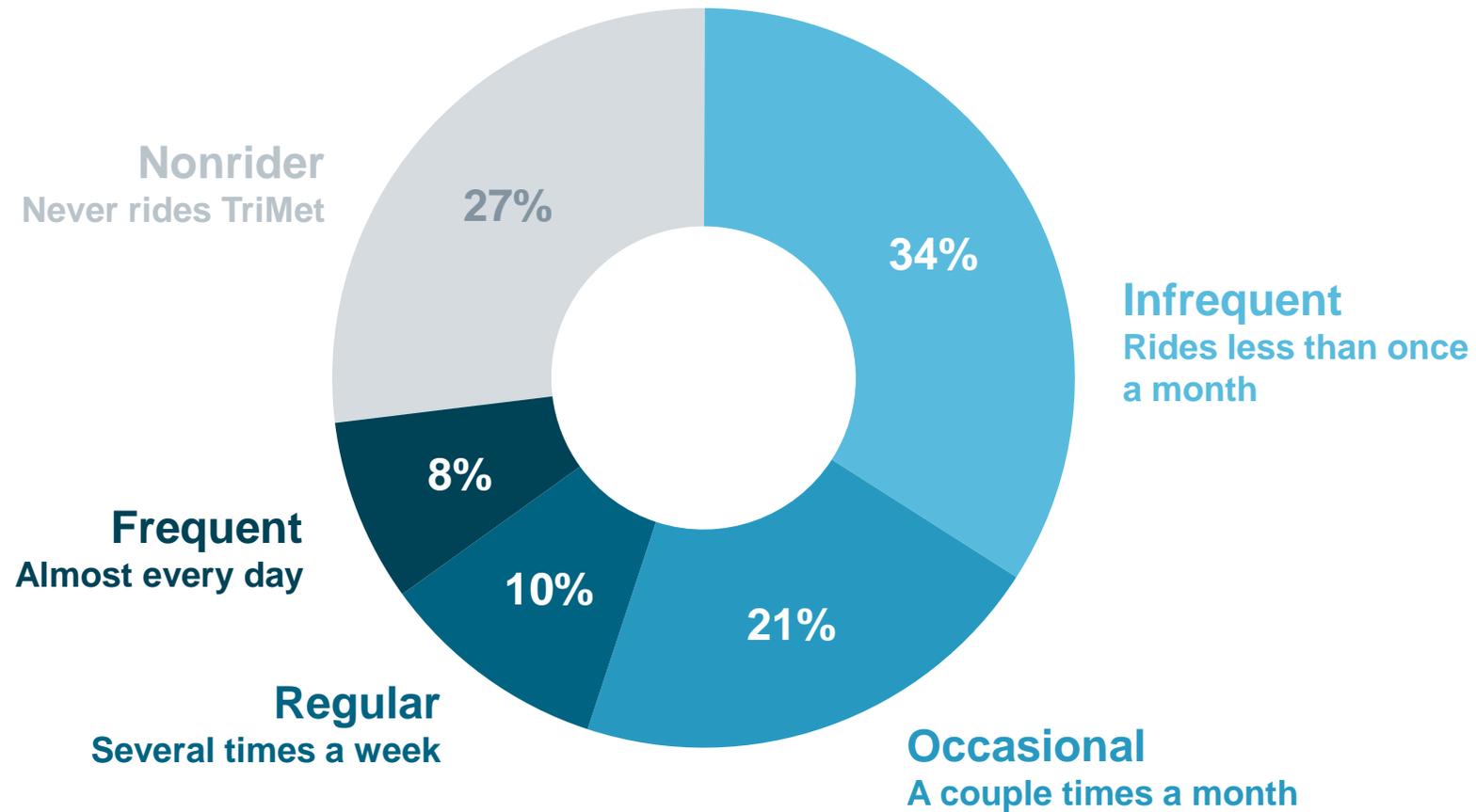
2014 2015 2016



Ridership

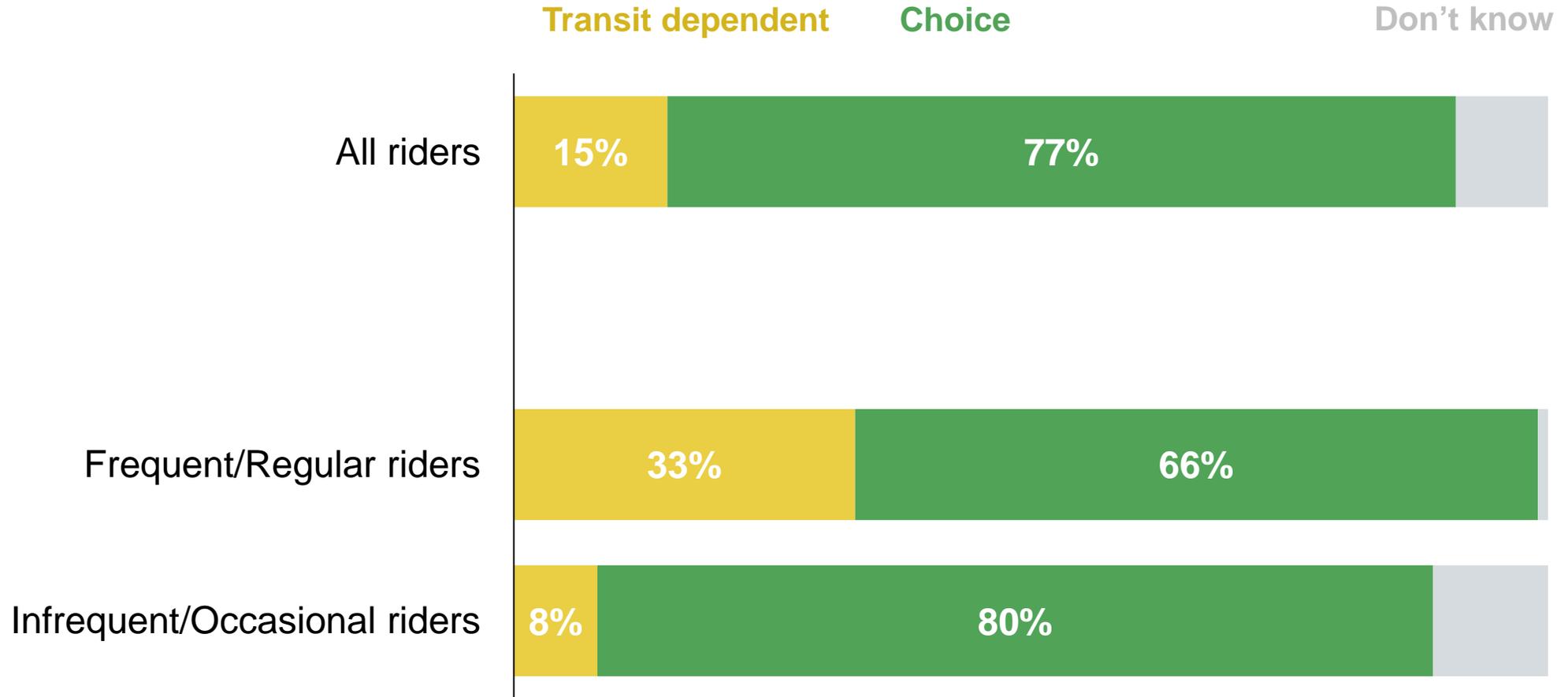


18% ride TriMet several times a week or more





Frequent/regular riders are more often transit dependent



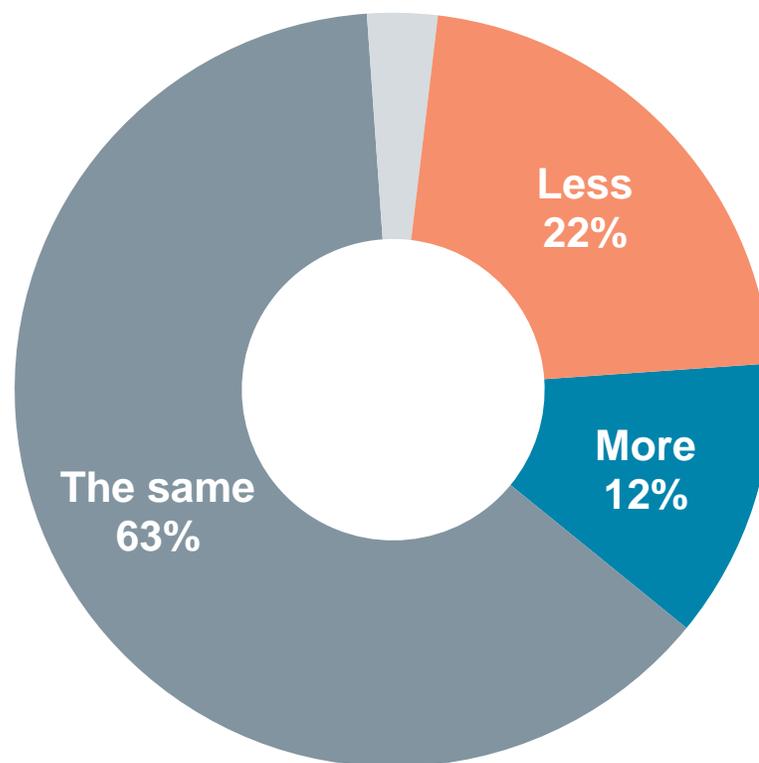


Transportation choices



6 in 10 ride TriMet the same amount as a year ago

Ridership Today Compared to Last Year





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

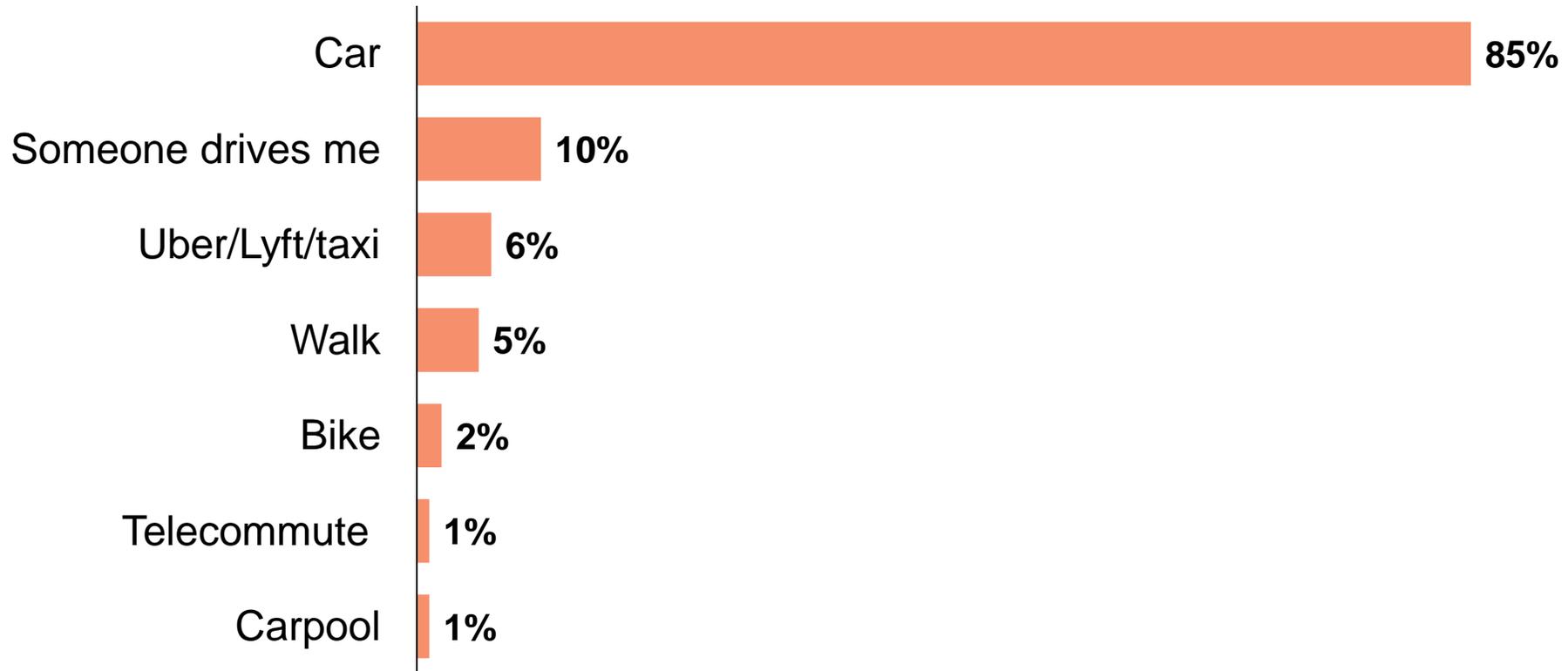
Types of trips decreased:

- Work (**39%**)
- Recreation (**28%**)
- Shopping (**17%**)
- Personal business (**17%**)



Car trips replace public transit trips for those riding less

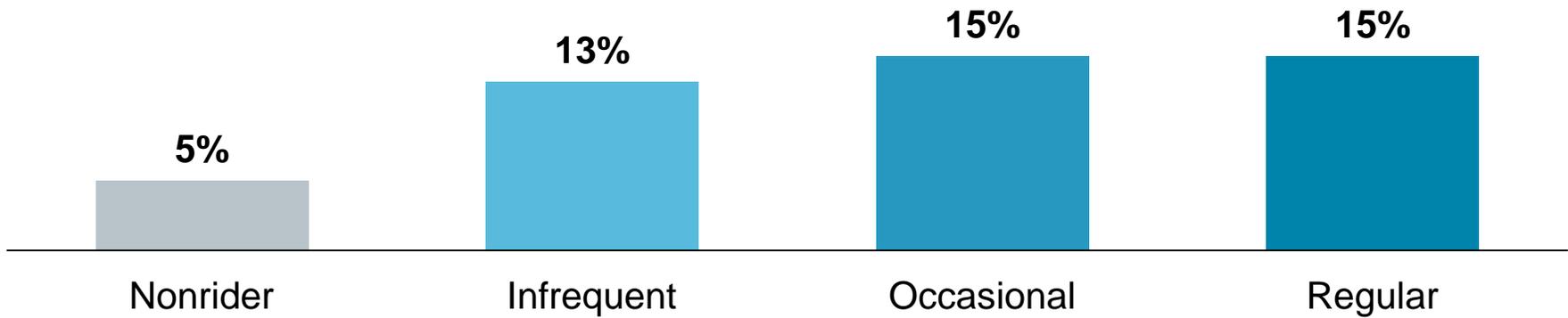
Types of Transportation Replacing TriMet





Frequent riders who changed habits were equally likely to become Regular, Occasional, or Infrequent riders

Where 2015 Frequent Riders Moved To:

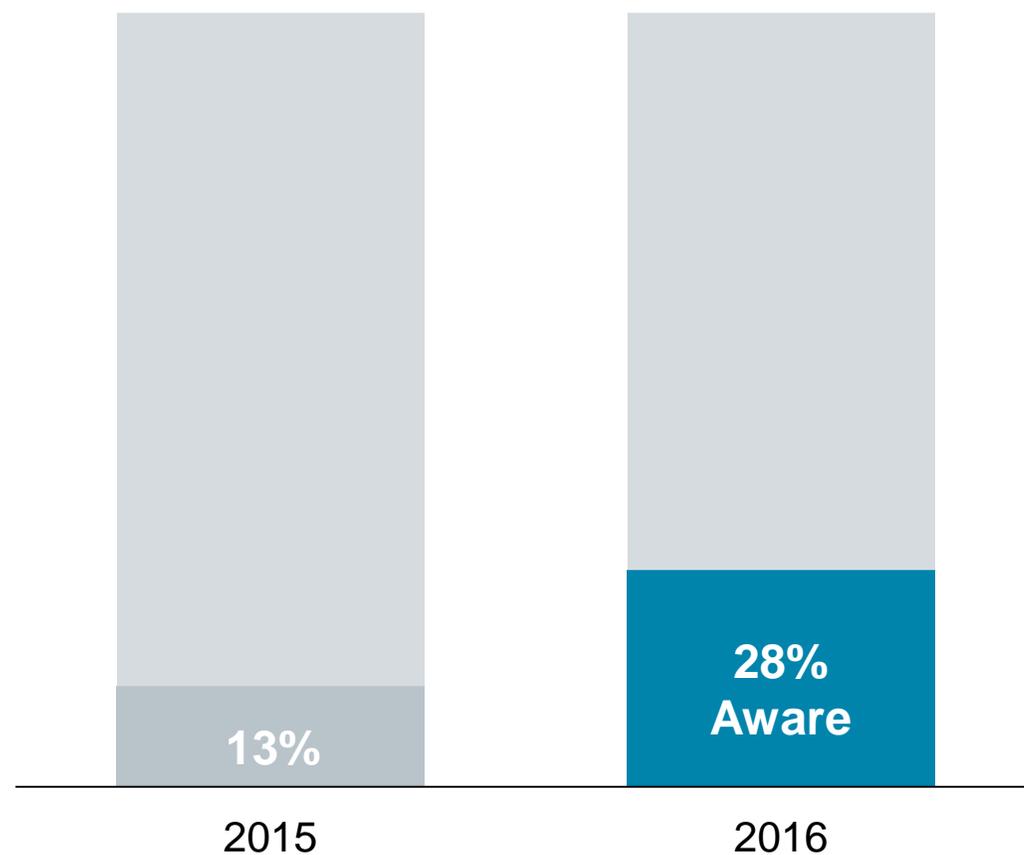




Project awareness



Hop Fastpass awareness has doubled from last year





Q & A

Su Embree (Midghall)
sembree@dhmresearch.com

Michelle Neiss
mneiss@dhmresearch.com

(503) 220-0575

www.dhmresearch.com

 @DHMresearch

 facebook.com/dhmresearch

dhm RESEARCH
DAVIS, HIBBITTS & MIDGHALL, INC.