

Metro RTO Survey

September 2017

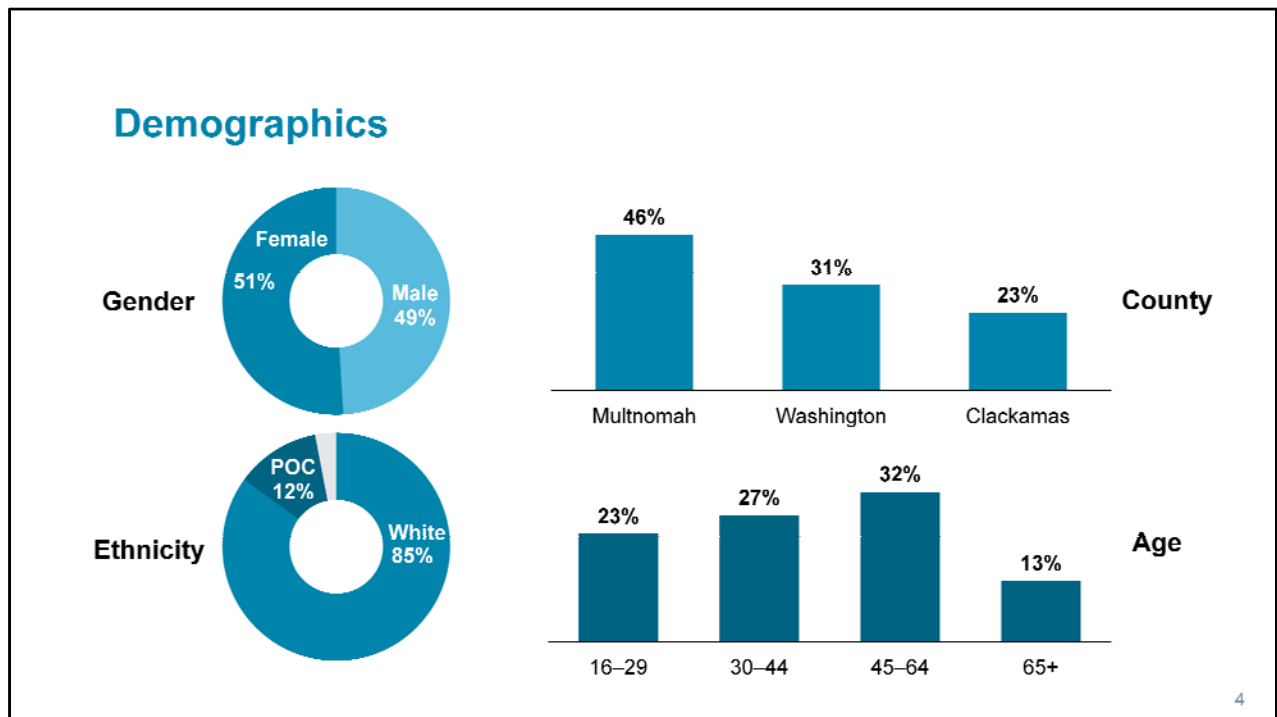


Research purpose

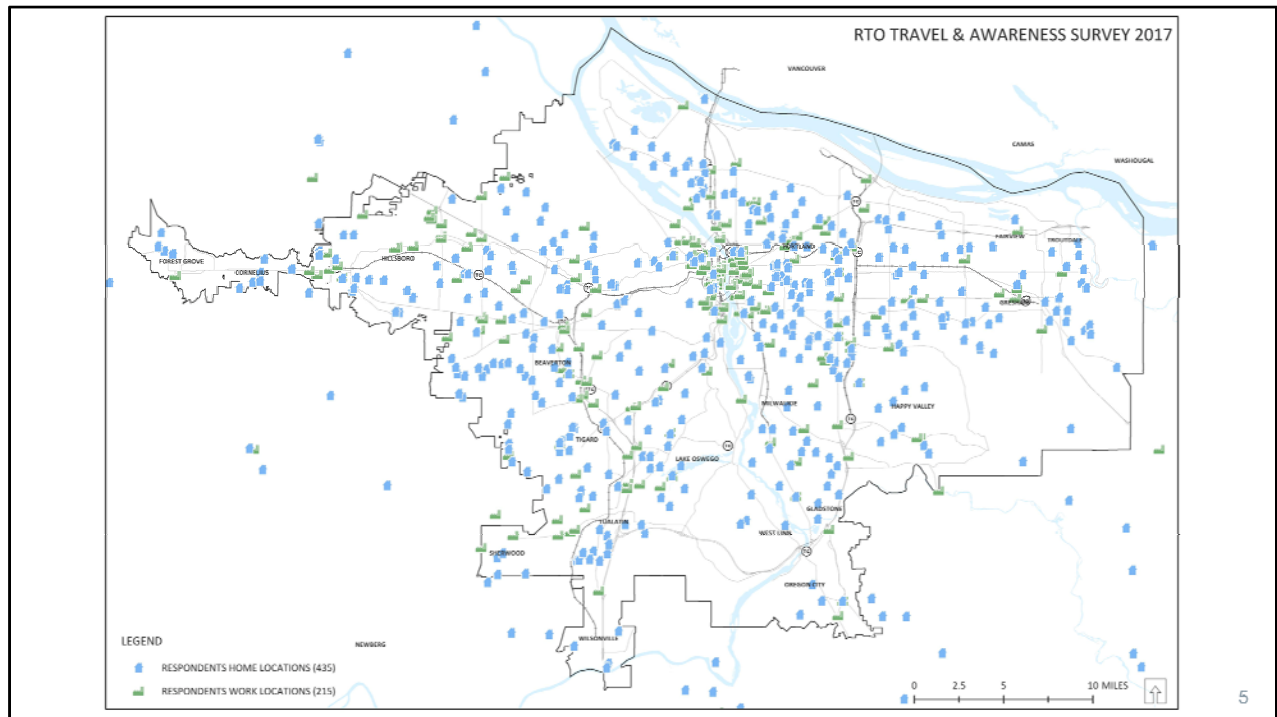
- Track Metro residents' travel choices and top trip purposes
 - Survey includes tracking questions repeated from 2014 and 2012, with additions to reflect new travel options
- Assess awareness of Metro area programs and services related to multi-modal transportation and transportation safety
- Determine interest in changing travel behavior and test most effective messages for prompting change

Methodology

- 601 Metro residents
 - Residents contacted from list of registered voters
 - 50% of respondents were reached by cell phone
- Conducted September 14 to 21, 2017
- Quotas set by age, gender, and county
 - Data weighted by these demographics and race/ethnicity to match the demographic makeup of Metro's jurisdiction
- Margin of error $\pm 4.0\%$



Quotas were set for age, gender, and county. Final data was weighted on these three demographics to match the makeup of the Metro region, per U.S. Census.

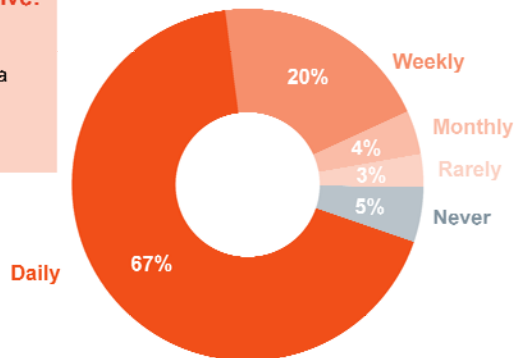


Modes

Nearly all residents drive a car at least occasionally.

More Likely to Never Drive:

- Seniors (15%)
- < \$50,000 (14%)
- < High school diploma (12%)
- Sole member of their household (15%)

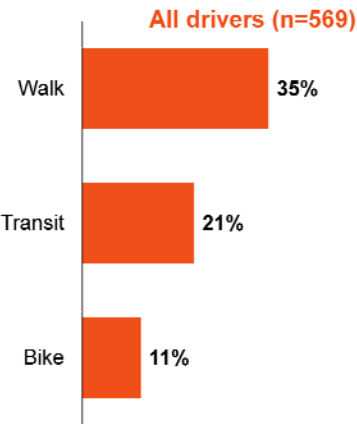


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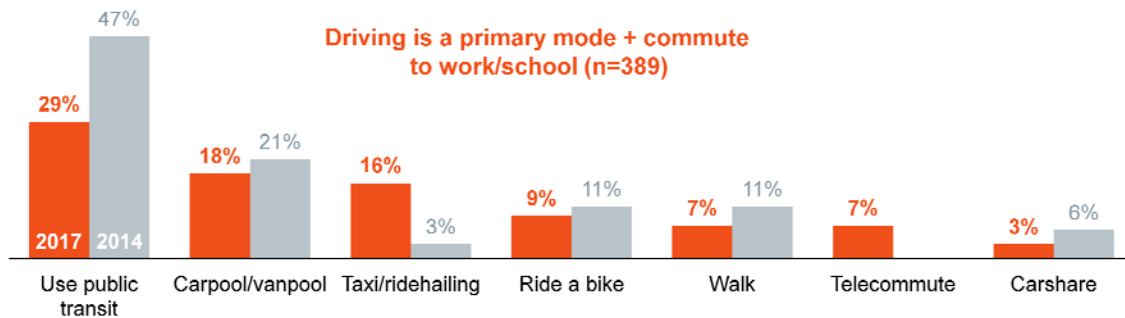
Q3. Over the course of this year, how often did you drive a car?

- A few groups were especially likely to say they never drive a car:
 - Seniors (15%)
 - Residents with incomes of less than \$50,000 (14%)
 - Residents with a high school diploma or less (12%)
 - Residents who are the sole member of their household (15%)
- Seniors are the most likely to say they never drive, and are also the most likely group to say they drive a few times per week, but not every day (37%).
- Multnomah County residents are also more likely to say they drive a few times per week, but not every day (23%), especially when compared to Clackamas County residents (14%).
- All residents with incomes of \$100,000 per year or more drive at least sometimes, and 99% drive monthly or more. This is a significant difference from residents with incomes of \$50,000 or less, 81% of whom drive monthly or more.

One in three drivers also walks for transportation; one in five uses transit.



Asked what they would do without access to a car, many drivers would opt for public transit to commute.



**Note: Response options and question wording differed across time.*

9

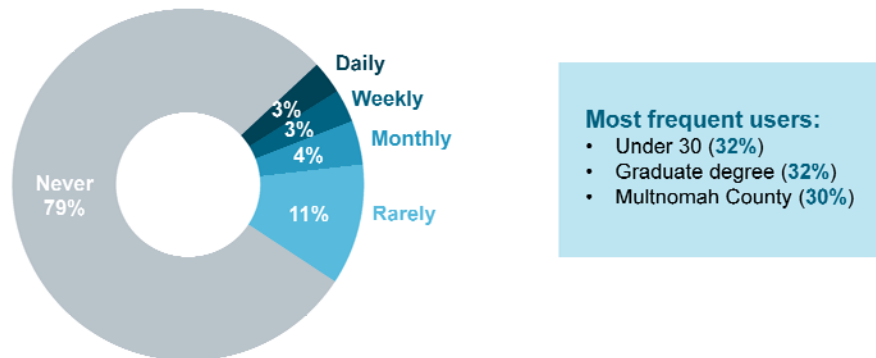
Those who drive as one of their two primary modes of transportation.

Those who commute to work/school.

Q19. If you did not have access to a car and needed to get to (work/school), would you most likely. . .

- Multnomah County residents (10%; n=18) are significantly more likely than Clackamas residents (2%, n=1) to say they would walk to work.
- People of color and residents with incomes of less than \$50,000 per year are the most likely to say they would take public transit under these circumstances (43%, 42%).
- In 2014, respondents were not offered a telecommute option, and their taxi option did not mention ridehailing.

Some residents ride a bike for transportation on occasion, but few do so daily.

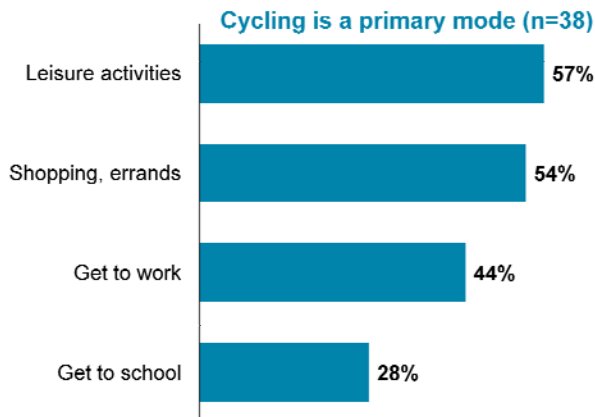


10

Q4. Over the course of the last year, how often did use a bicycle as a form of transportation? Keep in mind this is for transportation trips and not for exercise.

- A few groups are especially like to ride their bikes for transportation, at least on occasion:
 - Residents under 30 (32%)
 - Residents with a graduate degree (32%)
 - Multnomah County residents (30%)
- Men are significantly more likely to ride a bike for transportation, at least on occasion, than are women (26% to 18%).
- Biking as a form of transportation has remained fairly stable since 2014, when 3% of residents rode daily, 3% rode a few times per week, and 6% rode monthly. However, fewer residents now say they ride rarely (11% to 17% in 2014).

Biking is somewhat more common for errands or leisure, but 4 in 10 cyclists bike to work.



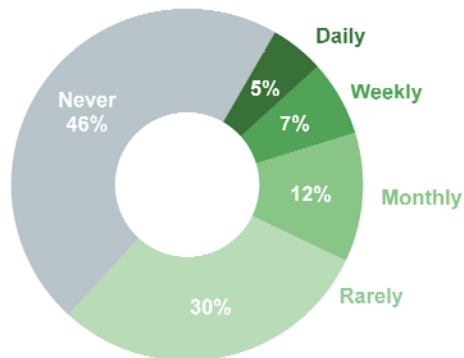
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Those who bike as one of their two primary modes of transportation.

Q21. Select all your purposes of cycling for transportation.

- Due to the small overall sample size of cyclists, differences between demographic groups should be interpreted as possible differences.
- Of the seven residents with incomes of less than \$50,000 who cycle, all seven do so for leisure activities (100%), and four cycle to get to school (57%).
- Of the 18 residents under 30 who bike, 12 do so for commuting (67%) and 13 bike for leisure activities (72%).
- Of the seven residents 30-44 who bike regularly, six do so to get to work (82%).
- Note: This data does not exactly track previous data about cycling purpose, due to changes in how the survey was conducted (top two modes only). However, as in 2014, leisure activities and shopping or errands were the top purposes, followed by commuting to work.

Just over half of residents ride transit for transportation at least occasionally.



Most frequent users:

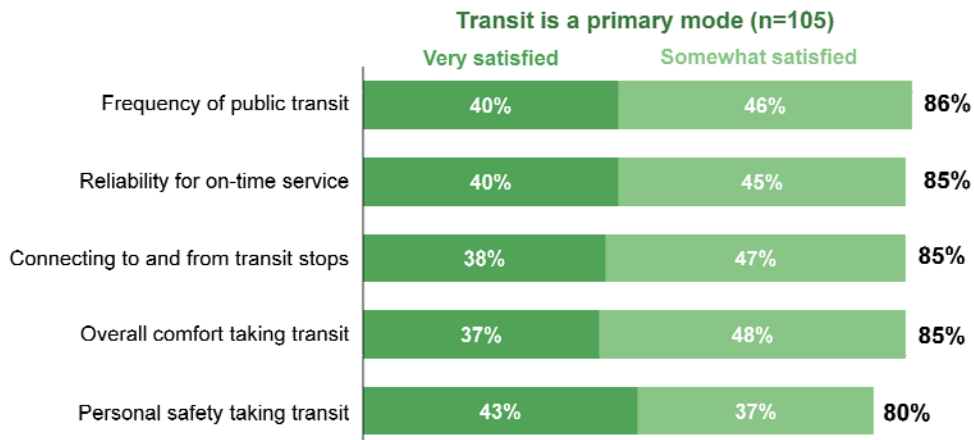
- Graduate degree (63%)
- Income <\$50K (62%)
- Under 30 (61%)
- Multnomah County (60%)

12

Q6. Over the course of the last year, how often did you ride public transit?

- Transit riders tend to be well-educated, younger, have lower incomes, and live in Multnomah County.
- These groups are not only the most likely to say they ride transit at least sometimes, but are also the most likely to say they ride transit monthly (30%-34%).
- Residents of color are also likely to indicate they ride transit monthly or more (34%).
- Ridership has remained stable since 2014, when 7% said they rode daily, 10% said they rode weekly, 9% said they rode monthly, and 36% said they rode transit only rarely.

Transit riders are satisfied with the services provided.



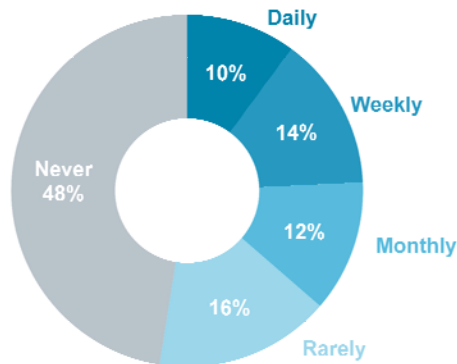
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Those who use public transportation as one of their two primary modes of transportation.

Q33-Q37. In general, when it comes to public transit, are you very satisfied, somewhat satisfied, not too satisfied, or not at all satisfied with the following?

- Compared to 2014, overall satisfaction (mean score of all five attributes) is somewhat diminished. However, in this study only riders use who use transit as one of their top two modes of transportation were asked to rate their experiences. Changes could be due to the difference in methodologies employed, or due to other factors.
- Washington County riders are more satisfied overall than their peers in Clackamas or Multnomah Counties (59% have a mean satisfaction of very satisfied, compared to 27% and 35%).
- Riders under 30 are less likely to be “very satisfied” overall (29%), while about two-thirds say they are “somewhat satisfied” (64%).
- College graduates are more likely to be “very satisfied” overall (68%).
- Satisfaction with *reliability* was higher than in 2014 (95% to 87%). These differences may be to due the change in methodology or other factors.

Just over half of residents walk for transportation at least sometimes.



Most frequent users:

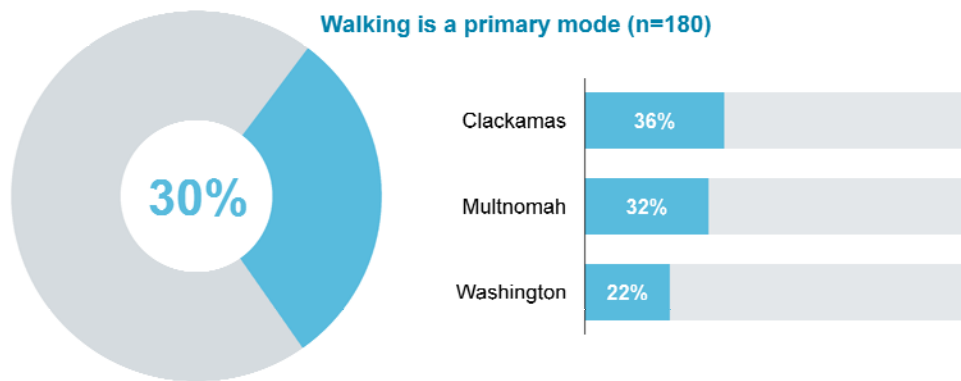
- Graduate degree (67%)
- Income <\$50K (62%)
- Multnomah County (58%)

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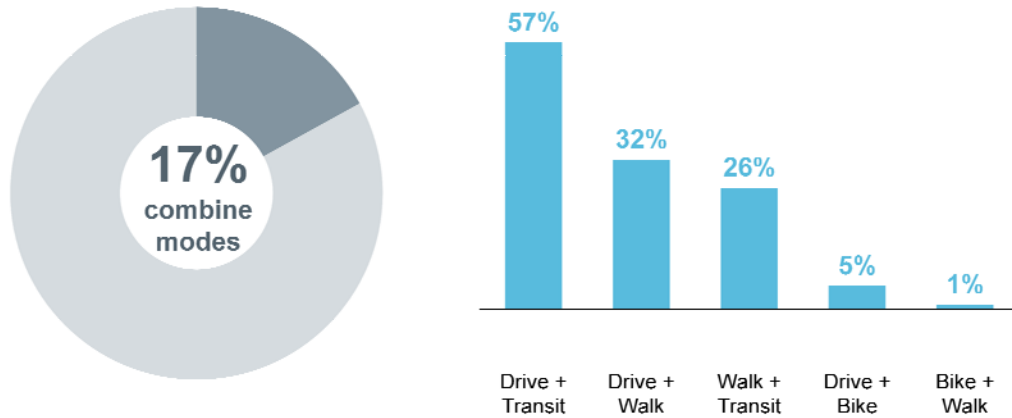
Q5. Over the course of the last year, how often did walk as a form of transportation? Keep in mind this is for transportation trips and not for exercise.

- Walking for transportation is highest among Multnomah County residents (58%), although many Clackamas County residents walk at least sometimes (51%). Washington County residents are the least likely to walk, and 55% say they never do so for transportation.
- Walking is also more common among residents with incomes of less than \$50,000 per year. Overall, 62% say they walk for transportation at least sometimes, and 41% say they do so monthly or more.
- Residents with graduate degrees are also likely to walk for transportation. Overall, 67% walk at least on occasion, and 47% walk for transportation at least once a month—more than any other demographic group.
- Residents under 30 also walk a lot. While 42% say they do so monthly or more, above average but not significantly more than their peers, 14% say they walk daily for transportation. This is significantly more than residents 30-44, but on par with residents 45-64 (13%).
- Walking has remained stable among residents since 2014, when 14% walked daily, 18% walked weekly, 10% walked monthly, and 22% said they rarely walked.

**3 in 10 residents walk as a main form of transportation,
but walking is less common in Washington County.**



1 in 6 residents combine modes to travel, and those who combine are likely to drive with another mode.

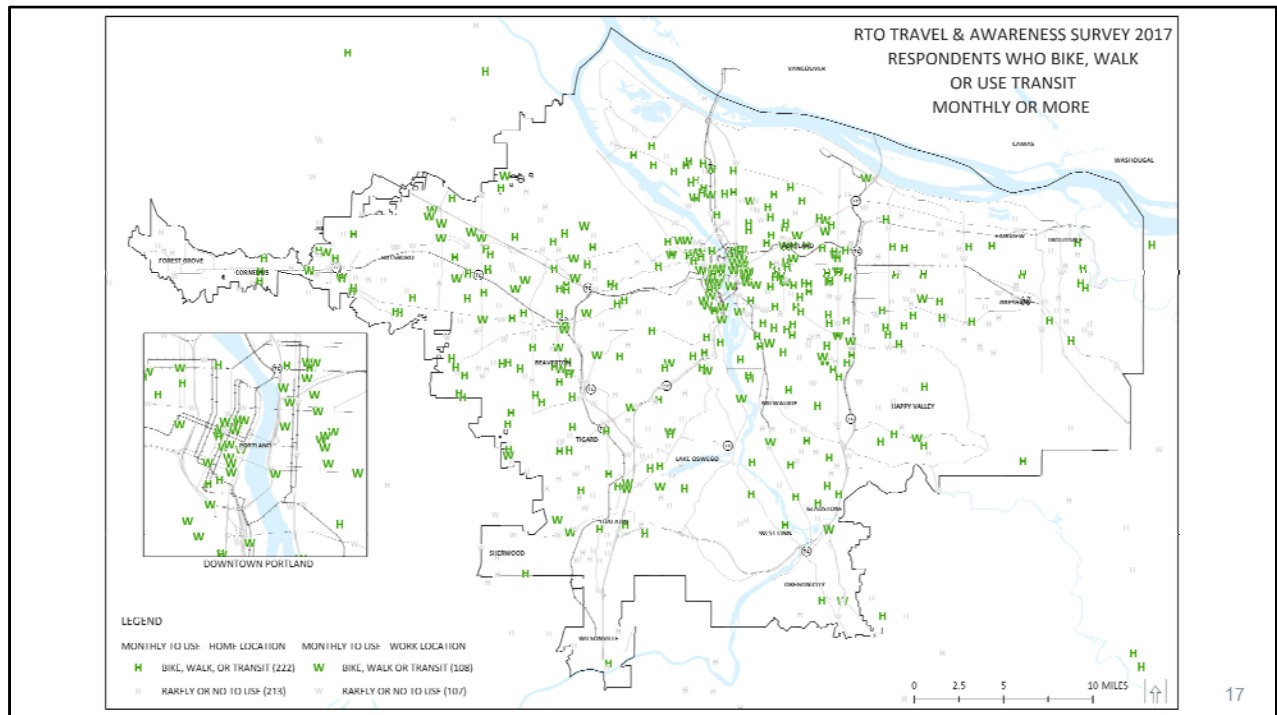


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Q10/Q13 (combined). When you (drive/bike/walk/use public transit) do you generally combine it with another type of transportation? For example, driving to a park and ride and then using public transit?

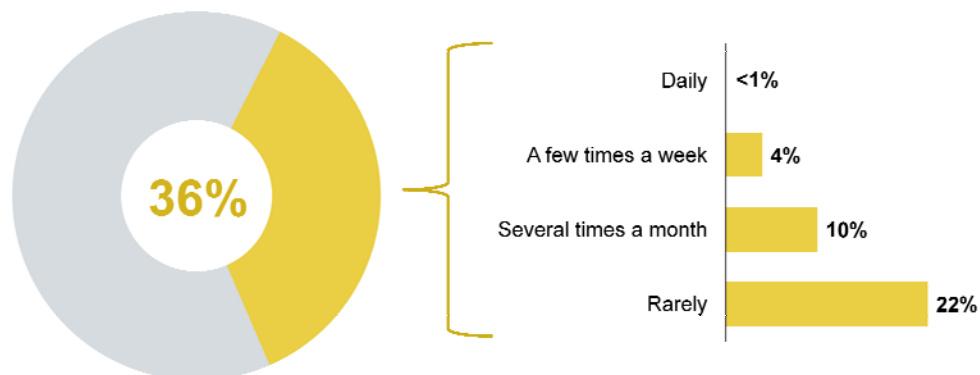
Q11/Q14 (combined) What combinations do you use, or how do you typically combine your trips?

N=98



Ridehailing & Technology

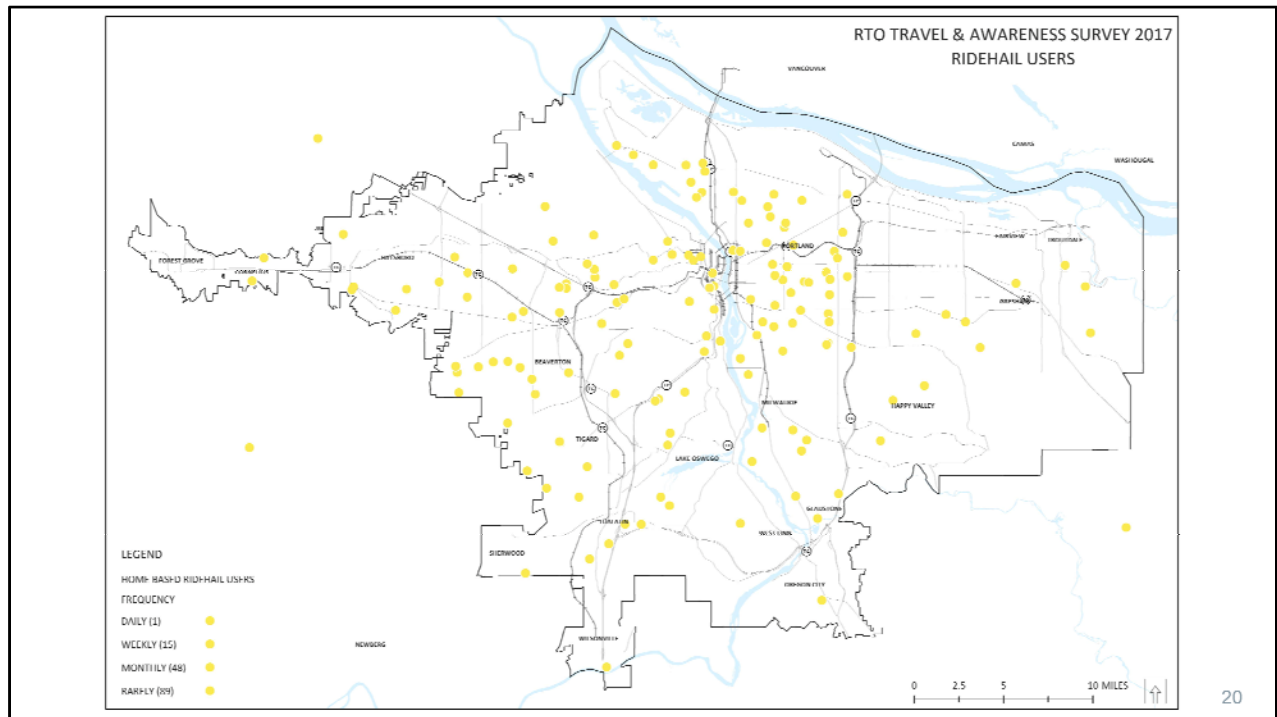
About one-third of residents have used a ridehailing app this year.



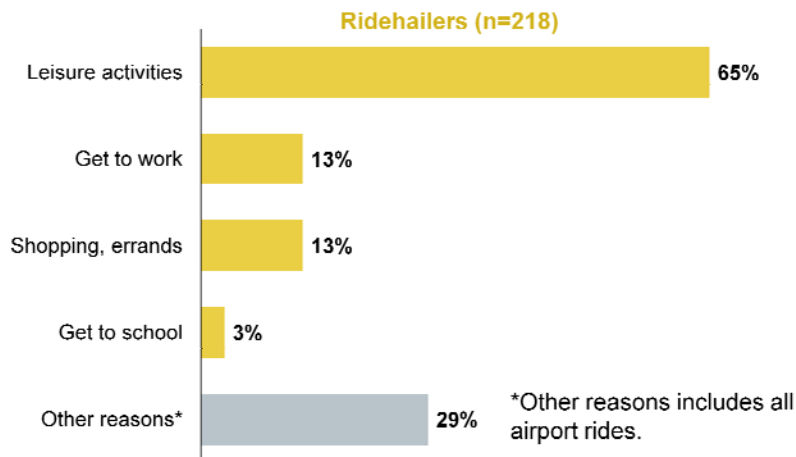
19

Q7. Over the course of this year, how often did you use a ridehailing app, such as Uber or Lyft?

- Residents under 30 are the most likely by age to have used a ridehailing service in the past year (48%), and usage declines steadily with age. Among residents 65 and older, just 13% have used such a service.
- Ridehailing use also increases steadily with income, and 44% of those with incomes of \$100,000 per year or more have used ridehailing in the past year.
- Ridehailing use is relatively equal among all residents in each county (32–39%).



Few residents use ridehailing to commute. Most use the service for leisure activities or other reasons.



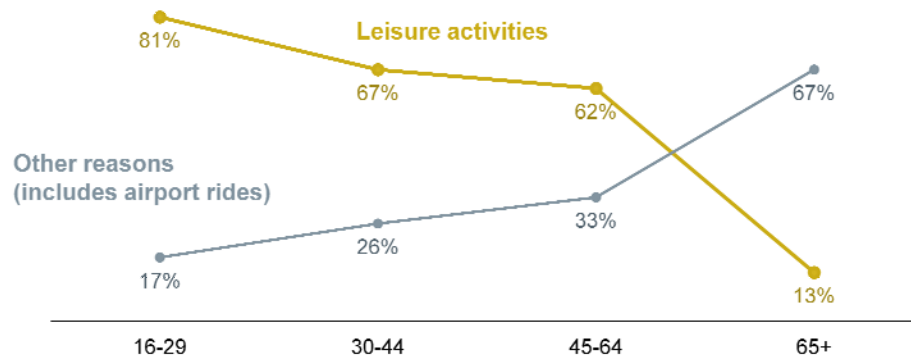
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Those who have used ridehailing services this year.

Q39. Select all of your purposes of using ridehailing.

- This question did not provide respondents a specific opportunity to indicate rides to or from the airport, but 29% of residents indicated they use the service for another reason.
- Multnomah County ridehailers are much more likely to use the service for errands and shopping (19%) than are ridehailers in Clackamas and Washington Counties (8% and 6%).

Ridehailing for leisure activities decreases with age, but using the service for other reasons increases with age.



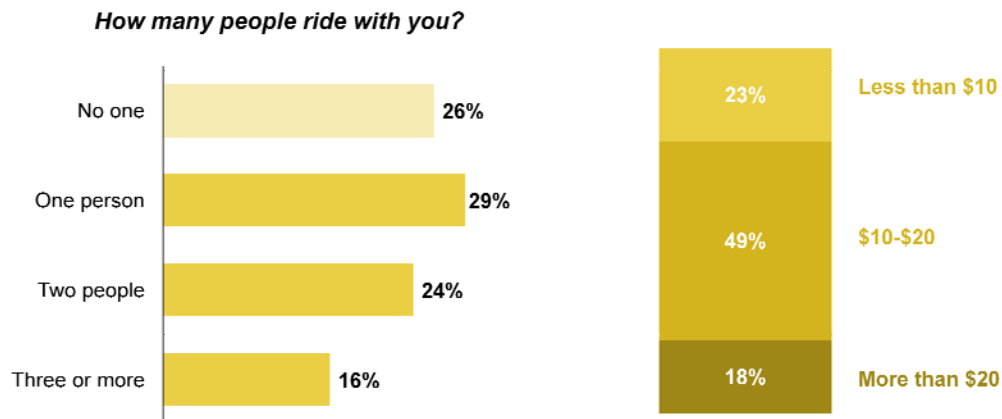
22

Those who have used ridehailing services this year.

Q39. Select all of your purposes of using ridehailing.

- It is not clear from the data what the other reasons are, but it is likely that respondents were often referring to rides to the airport. Older residents, especially, may also rely on ridehailing to get to and from doctor's appointments.

**Most ridehailers share the car with other passengers,
and nearly half of rides cost \$10-\$20.**



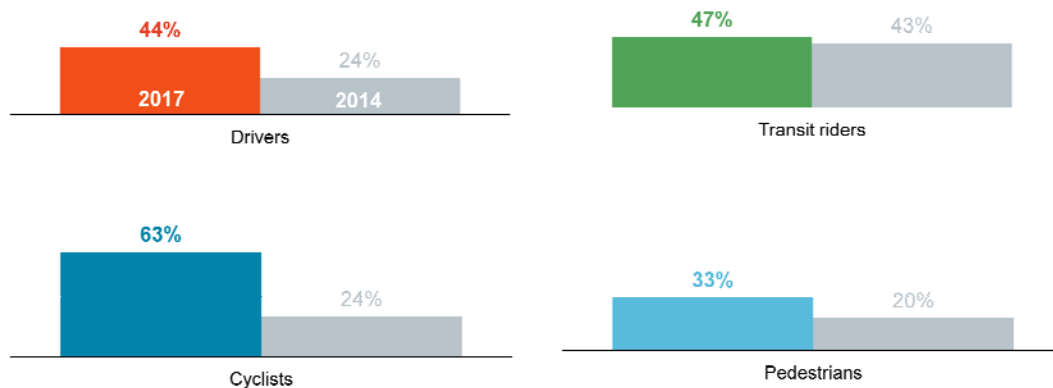
23

Those who have used ridehailing services this year.

Q40. In general, how many people ride with you when you use a ridehailing app?
This does not include the driver.

Q41. On average over the last year, were your rides under \$10, \$10-\$20, or more than \$20?

Reliance on smartphones for travel information increased, despite decreased reliance in all other sources.



24

Those who drive as one of their two primary modes of transportation.

Q20. Before or while driving, where do you get updated traffic information from?

- Residents over 65 are much more likely than their younger peers to rely on radio or TV news (54%).
- Conversely, residents under 45 are much more likely to rely on smartphone apps for traffic updates (55%) and GPS systems (26%) than are other groups.
- GPS systems are also more utilized by residents with incomes of \$75,000 per year or more (26%).
- Washington County residents are more likely to rely on word of mouth from their family and friends (13%).

Those who bike as one of their two primary modes of transportation.

Q27. Where do you get information to help you plan trips on your bicycle?

- There are no meaningful demographic differences.

Those who use public transportation as one of their two primary modes of transportation.

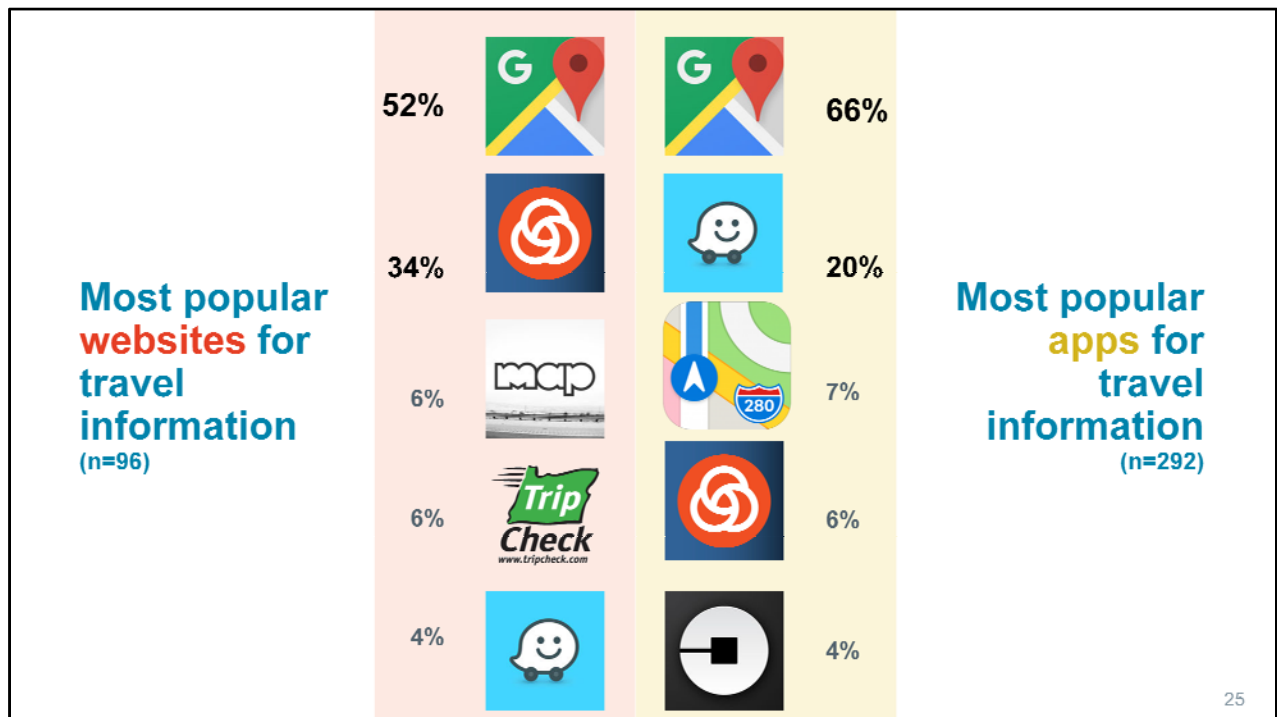
Q38. Where do you get information to help you plan public transit trips from?

- The list of options in 2014 was different (in addition to reaching a different subset of riders). In 2014, websites and smartphone apps were nearly equal (44% and 43%) as the top sources of information, following by calling or texting from a phone (21%).

Those who walk as one of their two primary modes of transportation.

Q30. Where do you get information to help you plan walking trips?

- Residents under 30 are the most likely of all age groups to rely on smartphone apps (52%). They are also more likely to rely on apps than other method, including “none.”



Those who use websites for transportation information (Q20, Q27, Q30, Q38).
 Q44. Thinking about your trips over the last month, which websites did you use the most for transportation information?

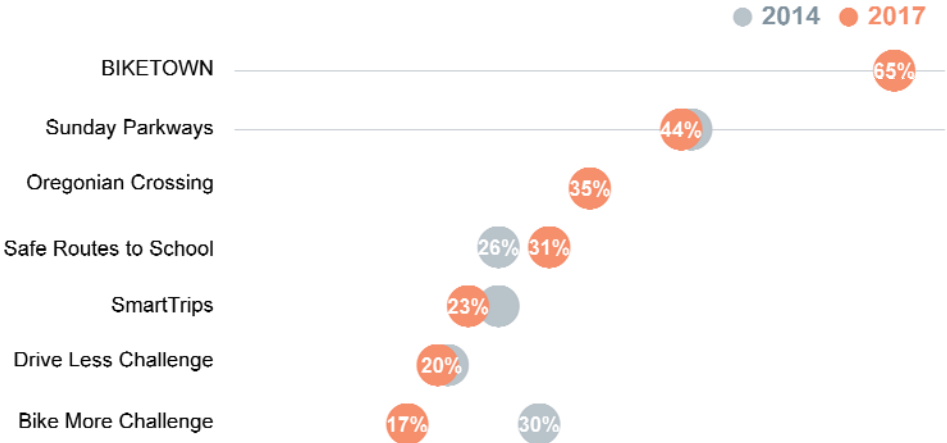
- Walkers use Google Maps more than average (69%), and transit riders use TriMet Trip Planner much more than average (71%).

Those who use apps for transportation information (Q20, Q27, Q30, Q38).
 Q45. Thinking about your trips over the last month, which apps did you use the most for transportation information?

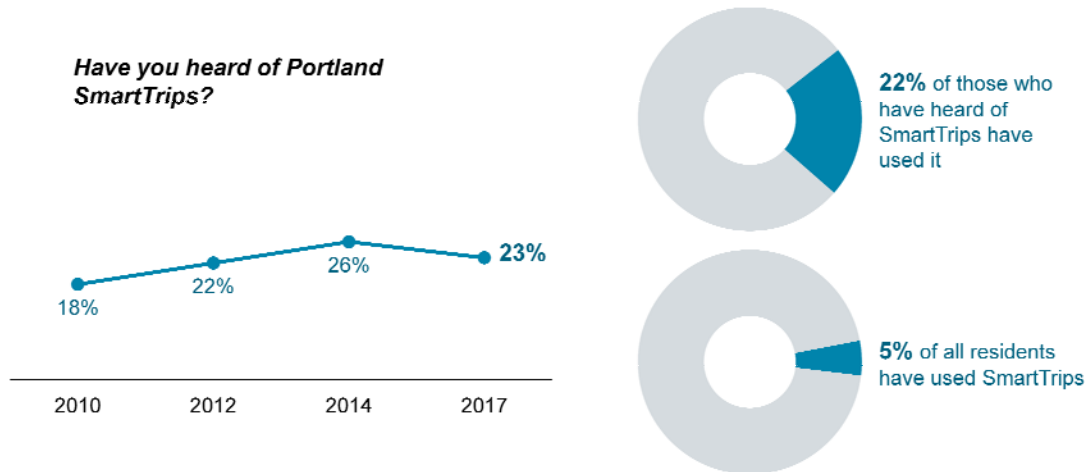
- 22% of transit riders use the TriMet app.

Awareness of programs and services

Awareness remained steady or increased across several RTO related programs.



About 5% of residents have used SmartTrips.



28

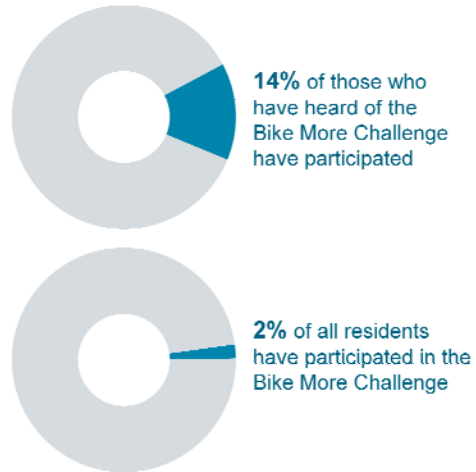
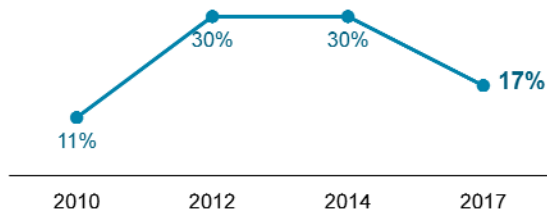
Q65-71. Have you seen or heard of the following programs?

Q65. City of Portland SmartTrips, which delivers information such as bike maps, walking maps, and transit guides to residents.

- After a few years of growth, awareness of SmartTrips appears to have leveled off.
 - In Multnomah County, awareness dropped 7 percentage points since 2014.
- Overall, there are few notable differences by demographic. However, a few stand out:
 - Women are significantly more likely than men to be aware (28% to 18%).
 - Residents with post-graduate education are much more aware (31%, compared to 20-23% for other education levels).
- There is no statistically significant difference between residents who have moved in the last five years and those who have not (20% to 25%).

Familiarity with the Street Trust bike challenge has dropped—perhaps due to the organization's new name.

Have you heard of the Street Trust Bike More Challenge?



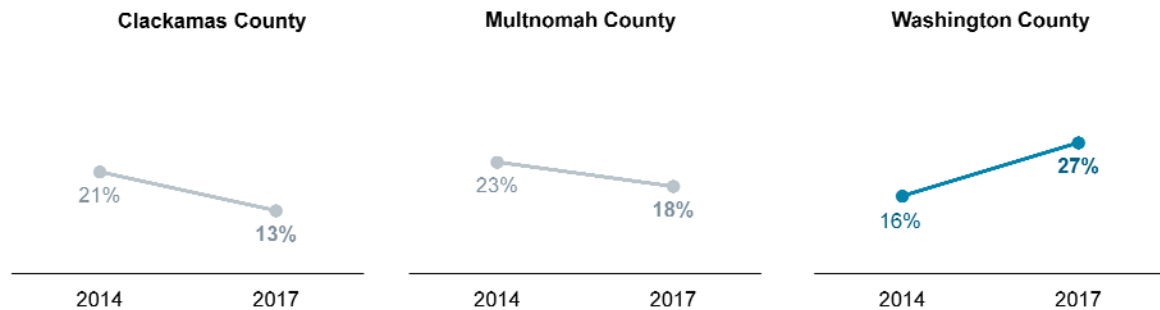
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Q65-71. Have you seen or heard of the following programs?

Q66. The Street Trust Bike More Challenge, a competition among workplaces where employees log their bike trips each May.

- Few residents overall have participated in the Street Trust Bike More Challenge.
- Although it is not clear from the data, the Street Trusts' new name may account for some of the drop in awareness. For example, in Multnomah County, awareness dropped 16 percentage points since 2014.
- Awareness of this program is highest among residents 30-44 and 45-64 (21%, 19%). These two age groups tend to exhibit the highest levels of awareness with programs and services, perhaps due to their work environment.
- More than half of bike commuters are familiar with this program (55%).

**Awareness of the Oregon Drive Less Challenge is stable,
thanks to increased awareness in Washington County.**



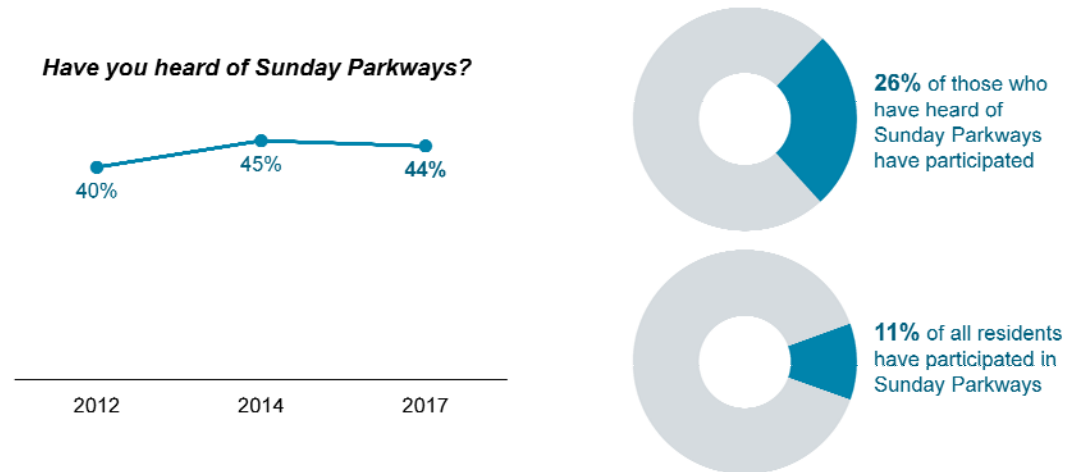
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Q65-71. Have you seen or heard of the following programs?

Q67. The Oregon Drive Less Challenge, a two-week challenge in September to reduce one million drive-alone miles and which includes incentives and events.

- Although awareness decreased in Multnomah and Clackamas Counties, Washington County residents are significantly more aware than they were in 2014.
- Awareness is highest among residents 30-44 (24%) and those with incomes of \$75,000-\$100,000 (34%).

Sunday Parkways remain one of the more recognizable programs. 1 in 10 area residents participates.



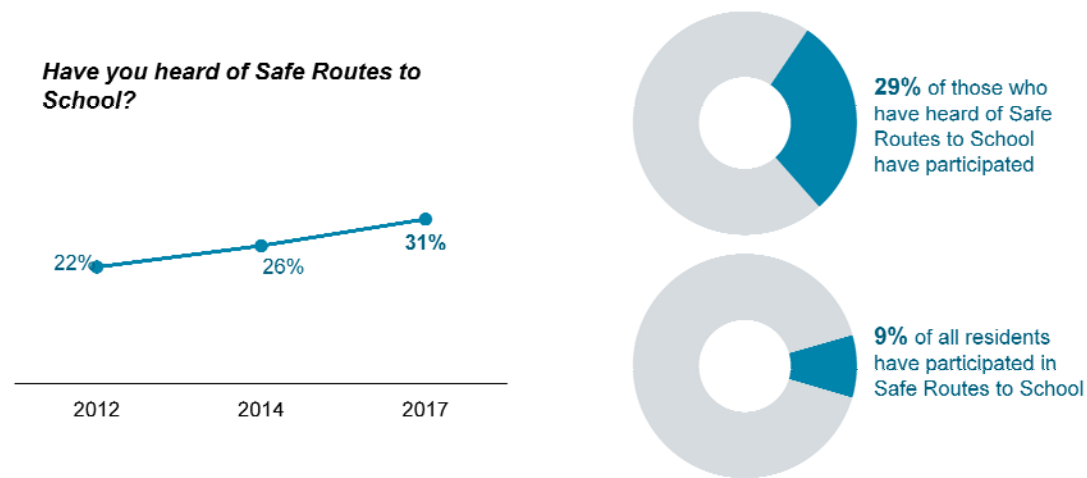
31

Q65-71. Have you seen or heard of the following programs?

Q68. Sunday Parkways, which are free events that open up city streets to bicyclists and walkers.

- Multnomah County residents remain much more aware of this program than residents in surrounding counties.
 - While Multnomah County saw a 2-point increase in awareness, Clackamas County saw a 3-point decrease, and Washington County saw a 4-point decrease.
- Awareness of Sunday Parkways increases with education, from 31% for residents with a high school education or less to 56% for those with graduate degrees.
- Women are significantly more aware of Sunday Parkways than are men (48% to 39%).
- Unsurprisingly, residents with bikes are significantly more aware of Sunday Parkways than residents without bikes (48% to 36%).
- By mode, awareness is highest among pedestrians (53%) and multi-modal travelers (52%).
- Residents who have expressed an interest in biking more and walking more are also especially likely to be aware of Sunday Parkways (61%, 54%).
- There is no difference between residents with children in the household and those without (44% to 43%).
- Participants tend to be younger, with high incomes and graduate degrees.

Awareness of Safe Routes to School continues to increase and it remains a popular program.



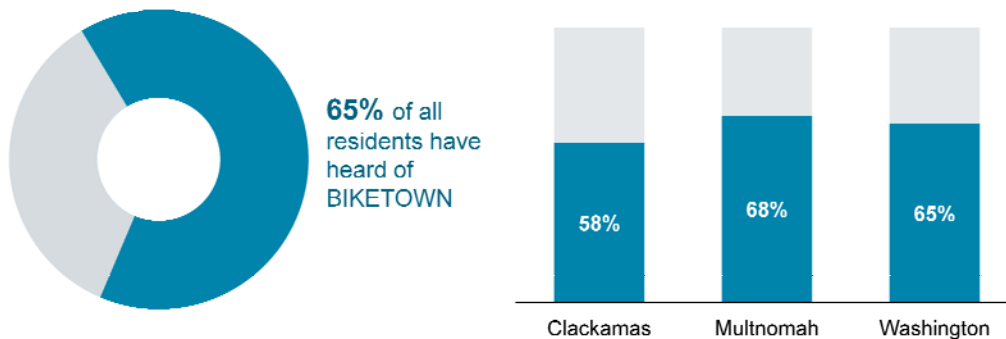
32

Q65-71. Have you seen or heard of the following programs?

Q69. Safe Routes to School, which creates safer, convenient, and fun opportunities for children to bicycle and walk to and from school.

- Safe Routes to School is the second most-used program, after Sunday Parkways. About three in ten residents have walked or biked more for school trips in the last year because of the program.
- The increase in awareness is driven by gains in Washington County since 2014 (+9).
- Unsurprisingly, residents with children are much more aware of the program (37% to 26%).
- Additionally, those who are multi-modal, who bike, or who walk for transportation are more aware (37%-46%).

Residents from across the Metro region are familiar with BIKETOWN.



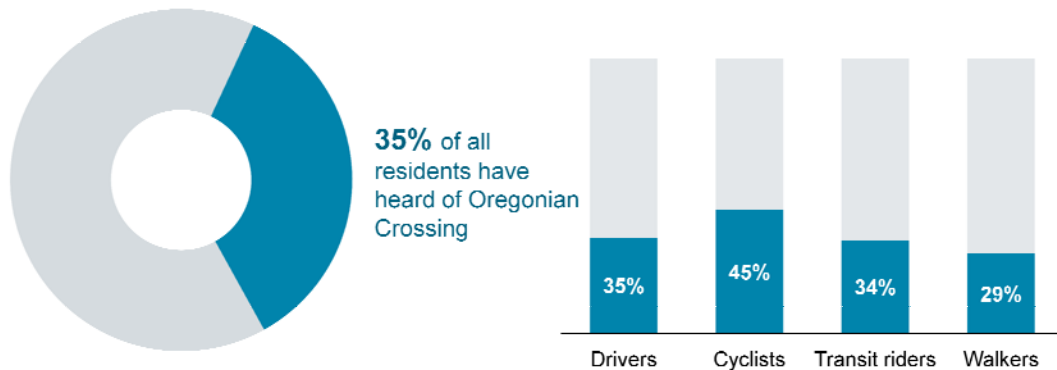
33

Q65-71. Have you seen or heard of the following programs?

Q70. BIKETOWN, the public bike share program launched in 2016 with 1,000 bikes and 100 stations across Portland. **(If needed: These are the orange Nike bikes.)**

- Most residents are familiar with the orange bikes around Portland, regardless of the county they are from.
- Awareness was highest among residents 30-44 and 45-64 (68%, 74%), and among those with incomes of \$100,000 per year or more and those with graduate degrees (74%, 75%).
 - These groups may be the most likely to spend time and work in the inner areas of Portland, where these bikes are located.
- Existing bike owners are significantly more familiar with the program than non-owners (71% to 56%), but the difference is even more stark among those who bike as one of their two main modes of transportation (86%) and those bike to work or school (96%).
- Overall, 3% of metro region residents have used the service.

About 1 in 3 residents are familiar with Oregonian Crossing, but awareness is lowest among pedestrians.



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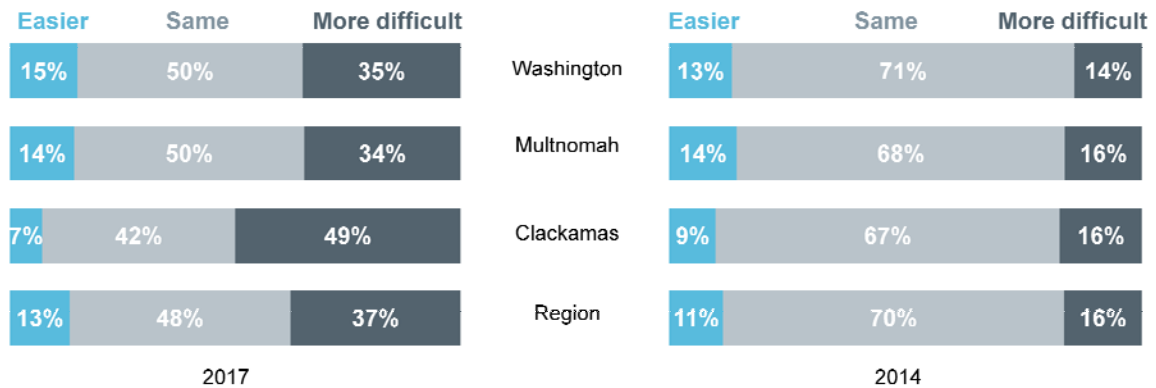
Q65-71. Have you seen or heard of the following programs?

Q71. Oregonian Crossing, an educational campaign that aims to increase awareness of Oregon's crosswalk law, which states that every intersection is a crosswalk where pedestrians have the right of way.

- Familiarity with Oregonian Crossing is similar to familiarity with Safe Routes to School.
- Residents with children in the household are more aware of Oregonian Crossing than those without, though the difference is not statistically significant (39% to 33%).
- Women are significantly more aware than men (40% to 31%).

Attitudes toward commuting

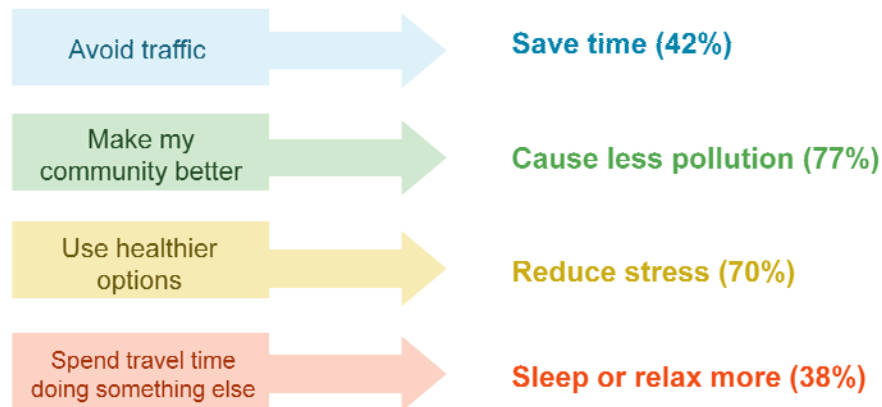
Those who commute to school or work say their commutes are the same or worse than last year.



Residents may be motivated to drive less to save time, relax more, and reduce stress.

Would reduce driving to . . .

So I can . . . (open-ended responses)



37

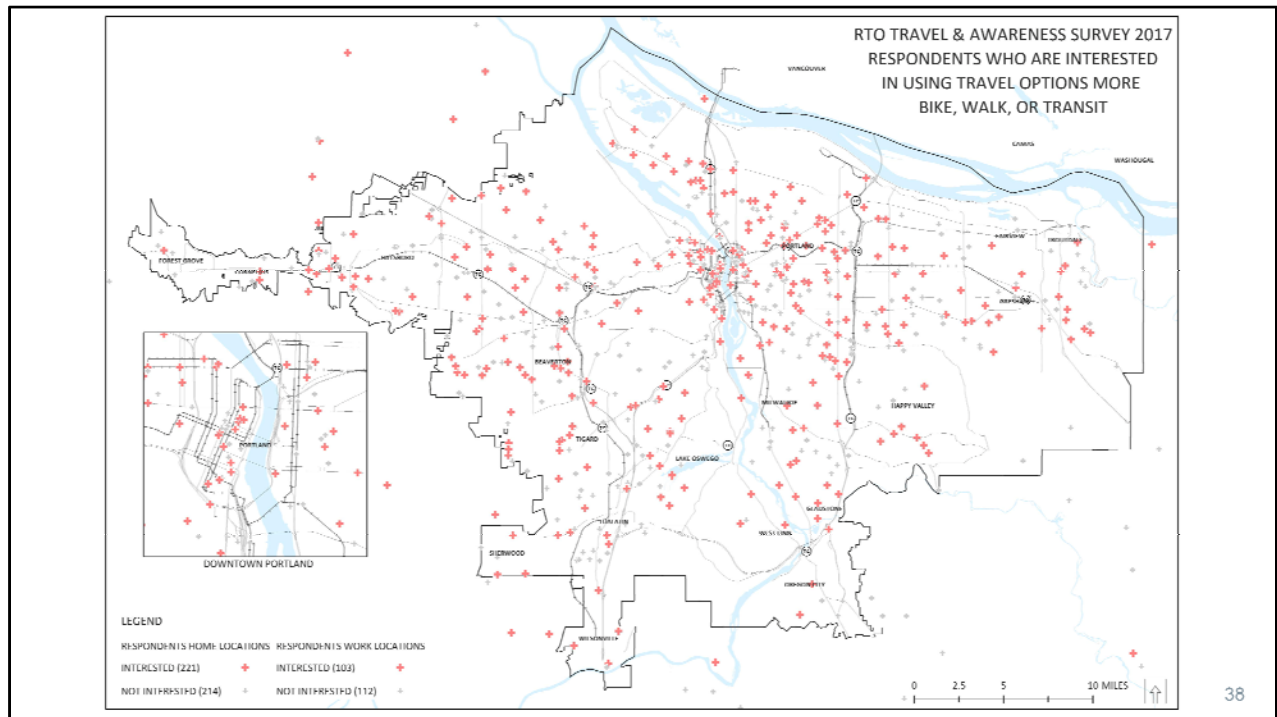
Q80. (If “I will avoid being in traffic” in Q77) In what ways would you benefit by avoiding traffic? (Open)

- Most demographic groups provided similar responses to this question and indicated they wanted to save time above all else.
 - However, a few groups were more likely to mention reduced stress, although these responses were often nearly tied with saving time. These groups included Washington County residents, women, residents under 45, and those with incomes of \$75,000 or more.

Q81. (If “To spend travel time doing something else” in Q77) How would you prefer to spend your time while going somewhere? (Open)

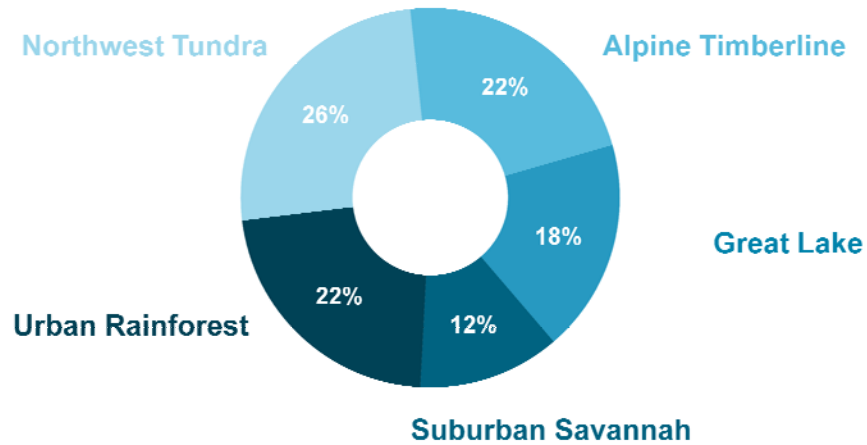
Q82. (If “To be healthier” in Q77) How do you think your health could be improved by using active transportation options like bicycling and walking? (read list, select all that apply)

Q84. (If “To make my community a better place” in Q77) In what ways do you think your community would benefit from you reducing the amount you drive? (Open)



Cluster analysis

We found 5 distinct types of transportation ecosystems.



40

The variables used for clustering were:

- Frequency of travel options (car, walk, bike, transit)
- Motivations to reduce driving
- Age of respondent
- Interest in biking, walking, or using public transit more
- Four context scores
 - Bike path access
 - Sidewalk density
 - Density of merchants and services
 - Public transit access

Northwest Tundra – 25%

Residents of the Northwest Tundra live across the Metro area, but are somewhat more likely to live in Clackamas County. Their homes generally lack travel options resources and have the lowest context scores in terms of bike access, sidewalk quality, transit quality, and urban amenities. Most never use any travel options and aren't interested in doing so. They might be more motivated to use transit to save money. However, given that they have poor transit access, they seem somewhat unlikely to change behavior.



Alpine Timberline – 22%



Alpine Timberline residents are more likely to live in Washington County. They're older than other groups, with a quarter of them retired. Most never use any travel options. If they do walk or use transit, it is likely in combination with driving. Their homes may have moderate bike & walk resources, but they are generally not interested in using them. They typically do not have excellent transit access. At most, half say they would be motivated to reduce driving in order to avoid being stuck in traffic, so there might be room to persuade them to use their time better. Convincing them to park and ride MAX might be the most likely scenario.

Great Lake – 18%



Great Lake residents are primarily younger (below 45) or upper income. They are fairly evenly split across the three counties, which means Clackamas residents are more likely to fall here than might be expected. They walk or use transit monthly, but are interested in using travel options more. When they walk, they are combining it with driving. Their homes typically have lower sidewalk, bike, and transit resources. They may benefit most by learning about practical steps on how to get started and make small changes. They like the idea of reducing driving in order to be healthier and make their community a better place.

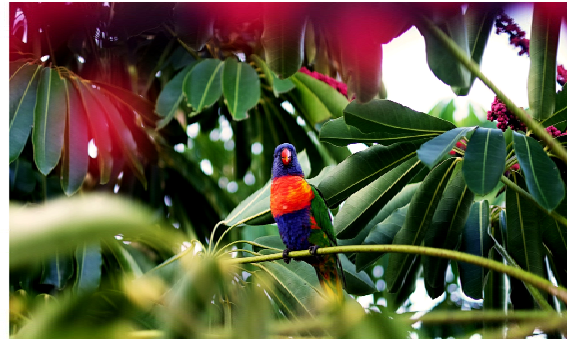
Suburban Savannah – 12%



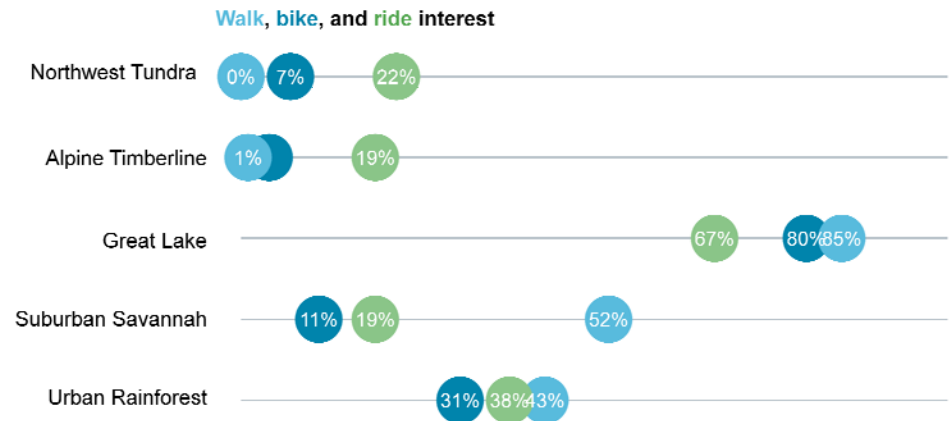
Residents of the Suburban Savannah are most likely to live in Washington County and are generally multi-modal. Although some live in places with bike paths, high sidewalk density, and transit access, many do not. A significant barrier is a low ULI score, indicating a lack of urban amenities within walking distance. These residents might benefit from having support for incorporating lifestyle changes that increase walking, and are focused in areas where amenities are within a more reasonable distance.

Urban Rainforest – 22%

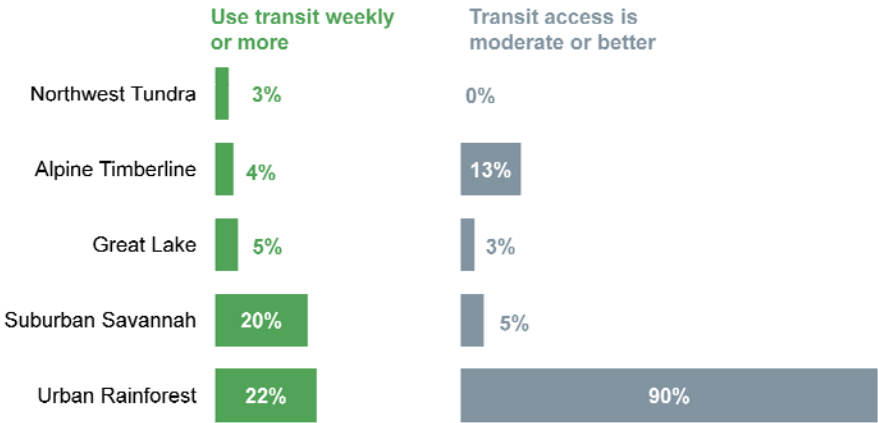
Residents of the Urban Rainforest live primarily in Multnomah County and fully enjoy the benefits of having easy access to resources for walking, biking, and transit. They are multi-modal and are interested in using more TO. They tend to be younger, and although they are motivated by practical reasons to drive less (saving money, avoiding traffic), they are also motivated to make their community a better place to live. The focus here is on supporting and encouraging them to continue to bike, walk, or ride transit; this is a ready audience.



The majority of Great Lake residents are interested in walking, biking, and riding transit more.



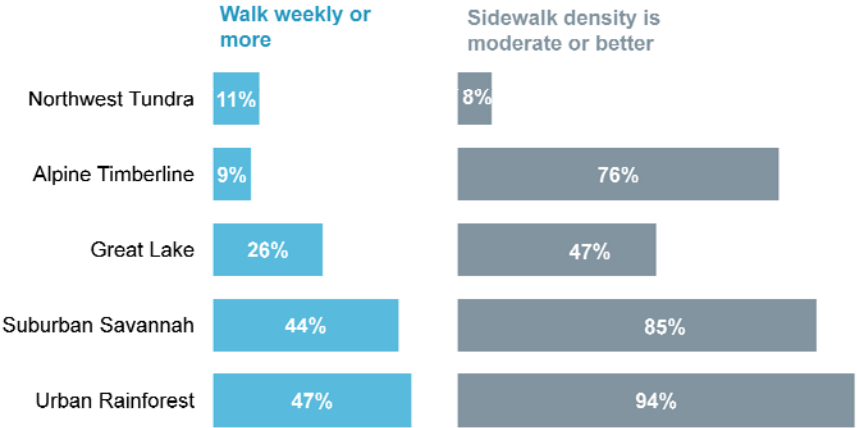
Alpine Timberline residents have a clear opportunity to increase transit use.



47

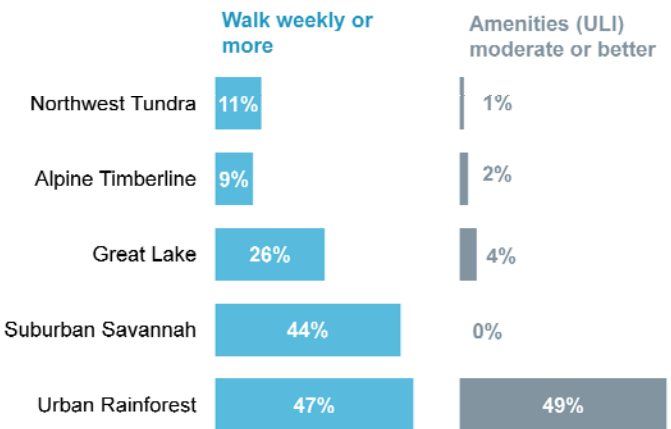
Moderate transit access context score = 1, 2, 3

Alpine Timberline and Great Lake residents potentially could walk more.



Moderate sidewalk density context score = 1, 2, 3

Suburban Savannah residents may be able to teach others how to incorporate walking beyond the neighborhood.



49

Moderate amenities (ULI) context score = 1, 2, 3

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