

TriMet Ridership Analysis

**Board Briefing
September 27, 2017**

Major Findings (2001-2016)

Overall Ridership

- Relatively flat

MAX Ridership

- On peak up, off peak less so

Bus Ridership

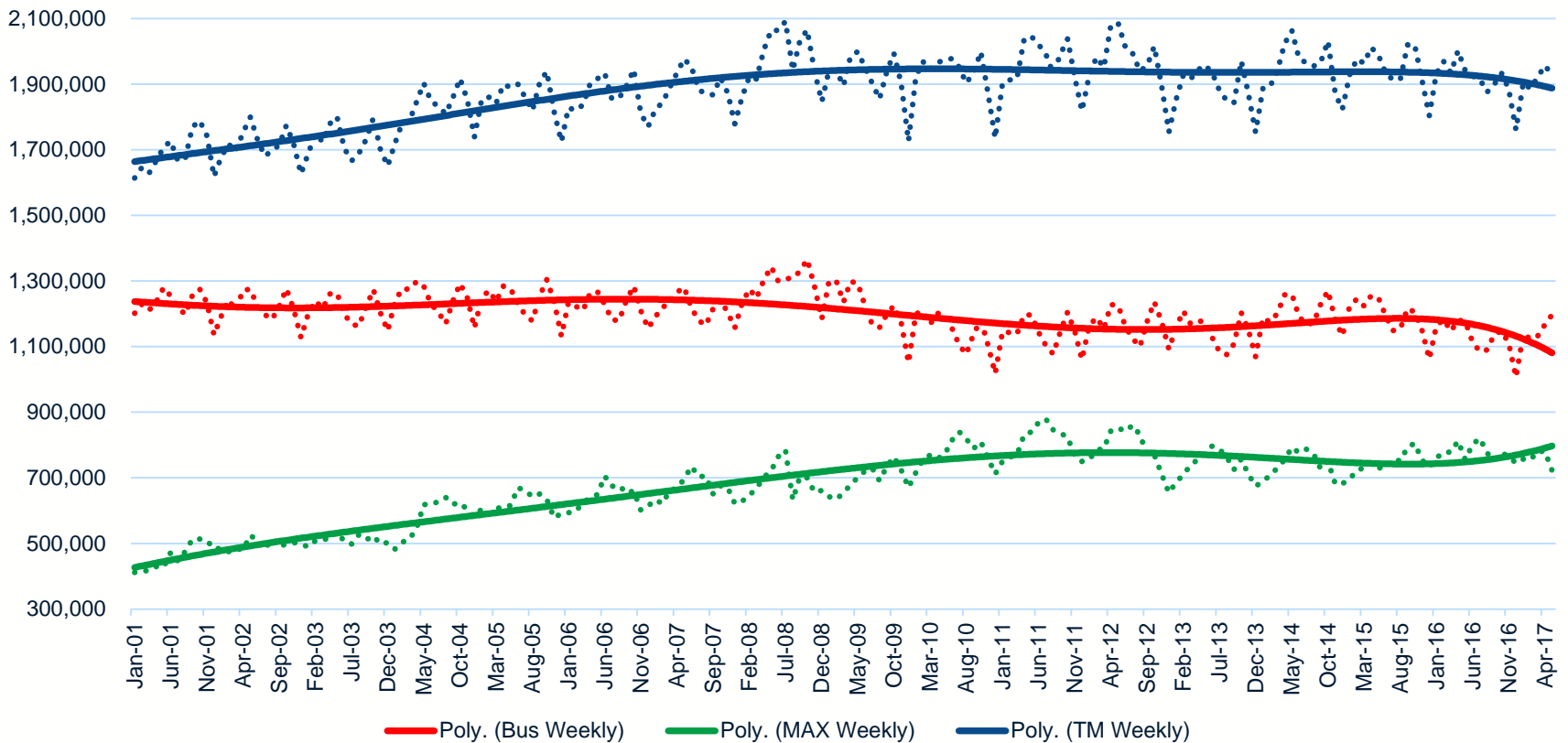
- Down for both on and off peak

No single factor explains trends

Strategies to respond

Total Ridership

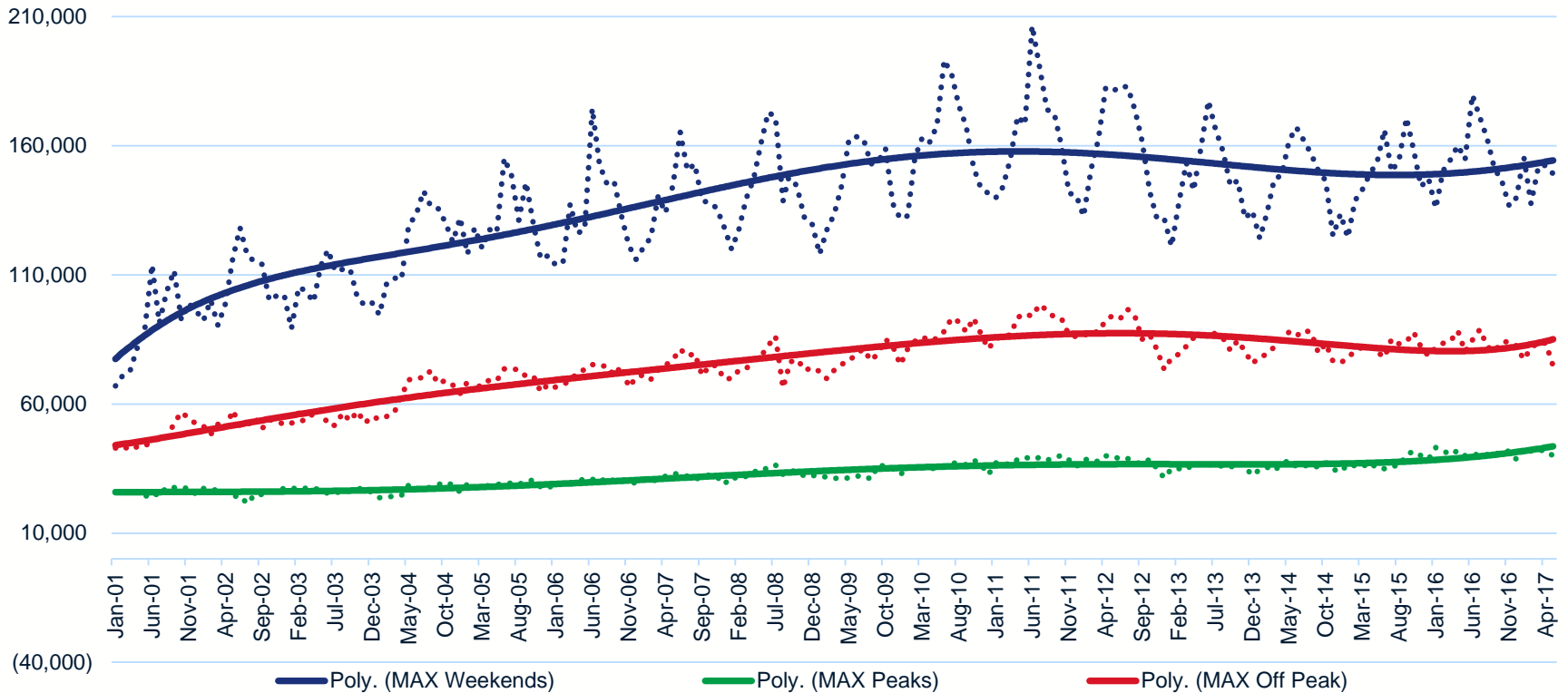
Total, Bus & MAX



— Poly. (Bus Weekly) — Poly. (MAX Weekly) — Poly. (TM Weekly)

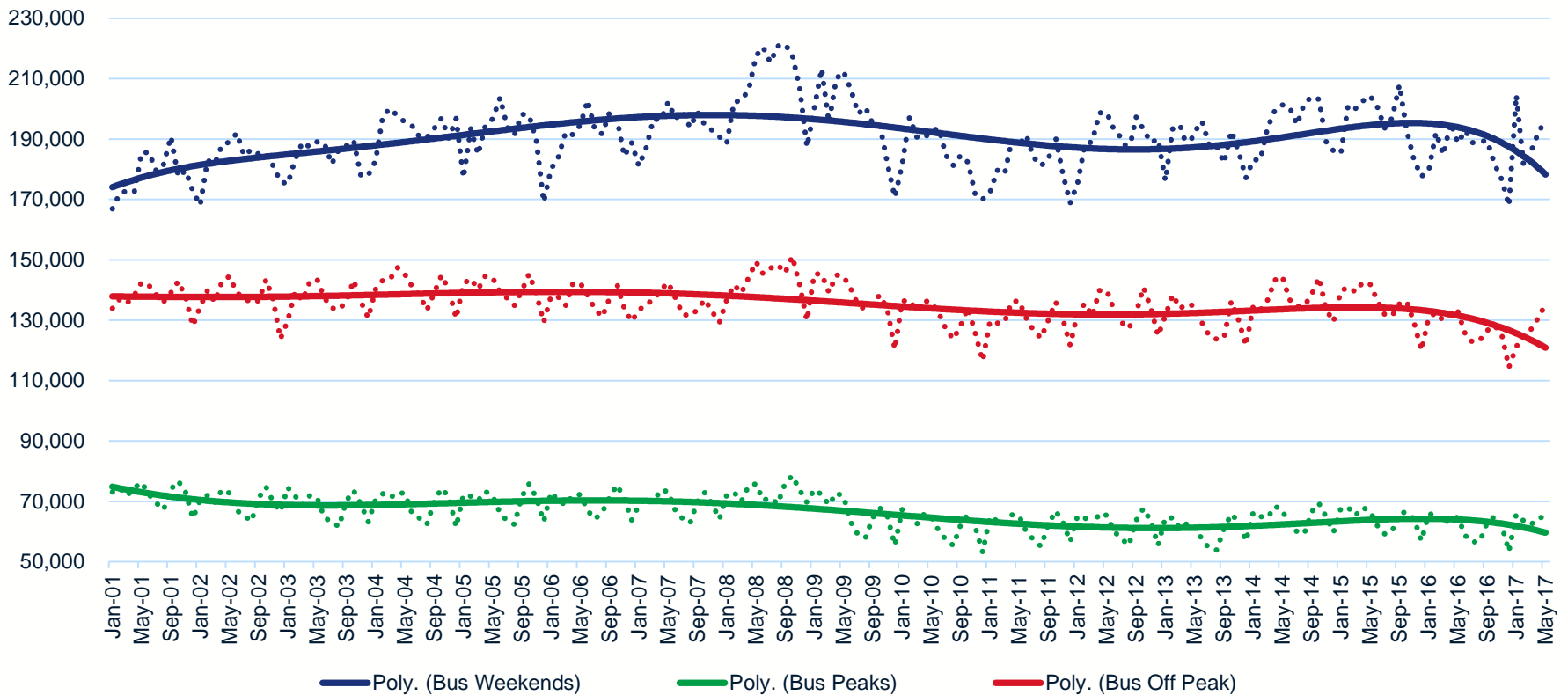
MAX Ridership

MAX Boardings



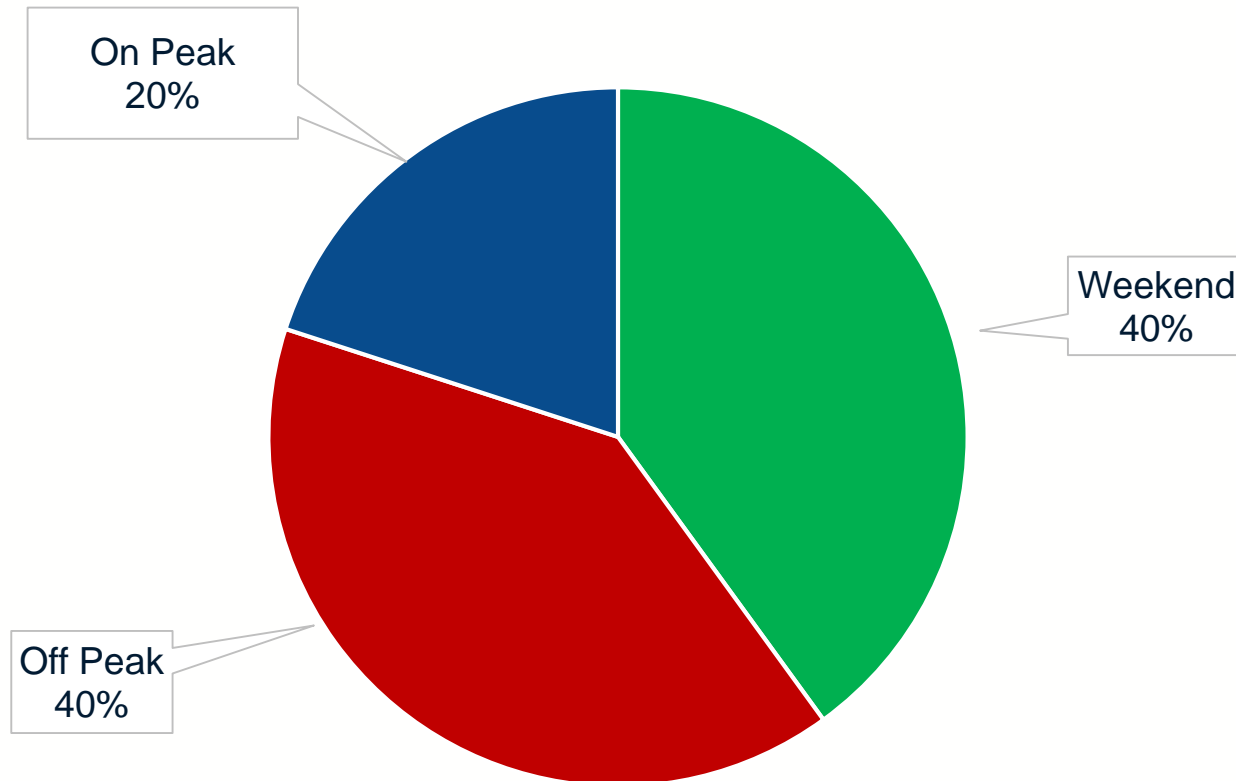
Bus Ridership

Bus Boardings



Components of Bus Ridership Declines

Average Bus Ridership Losses
2008 to 2016



Why?

Historical correlations

- Gas prices
- Employment
- Fares

Operational factors

- Service hours
- OTP
- Travel time

Other modes

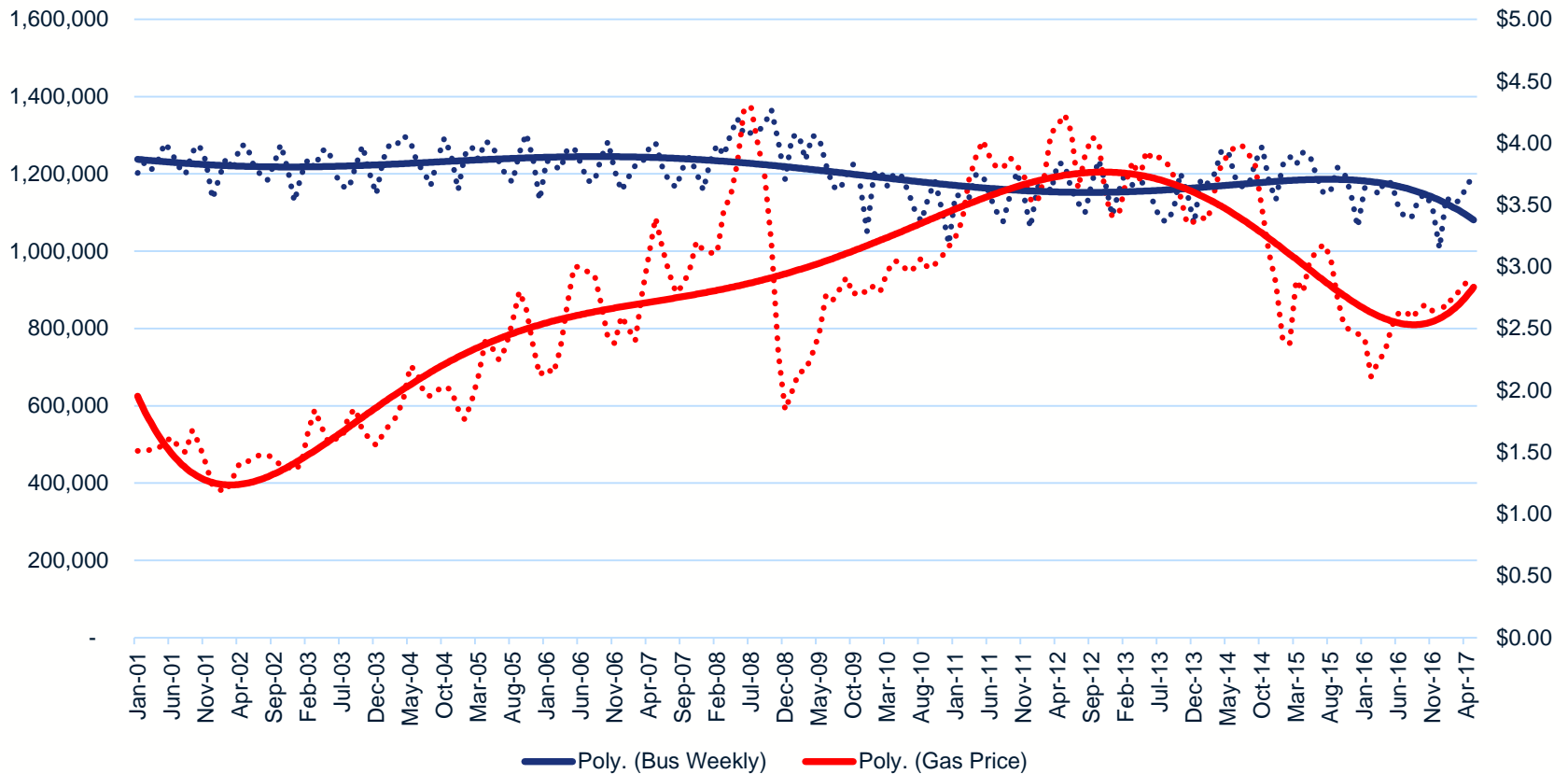
- Car, Bike, Lyft/Uber, Walking

Demographic changes

- Housing & employment

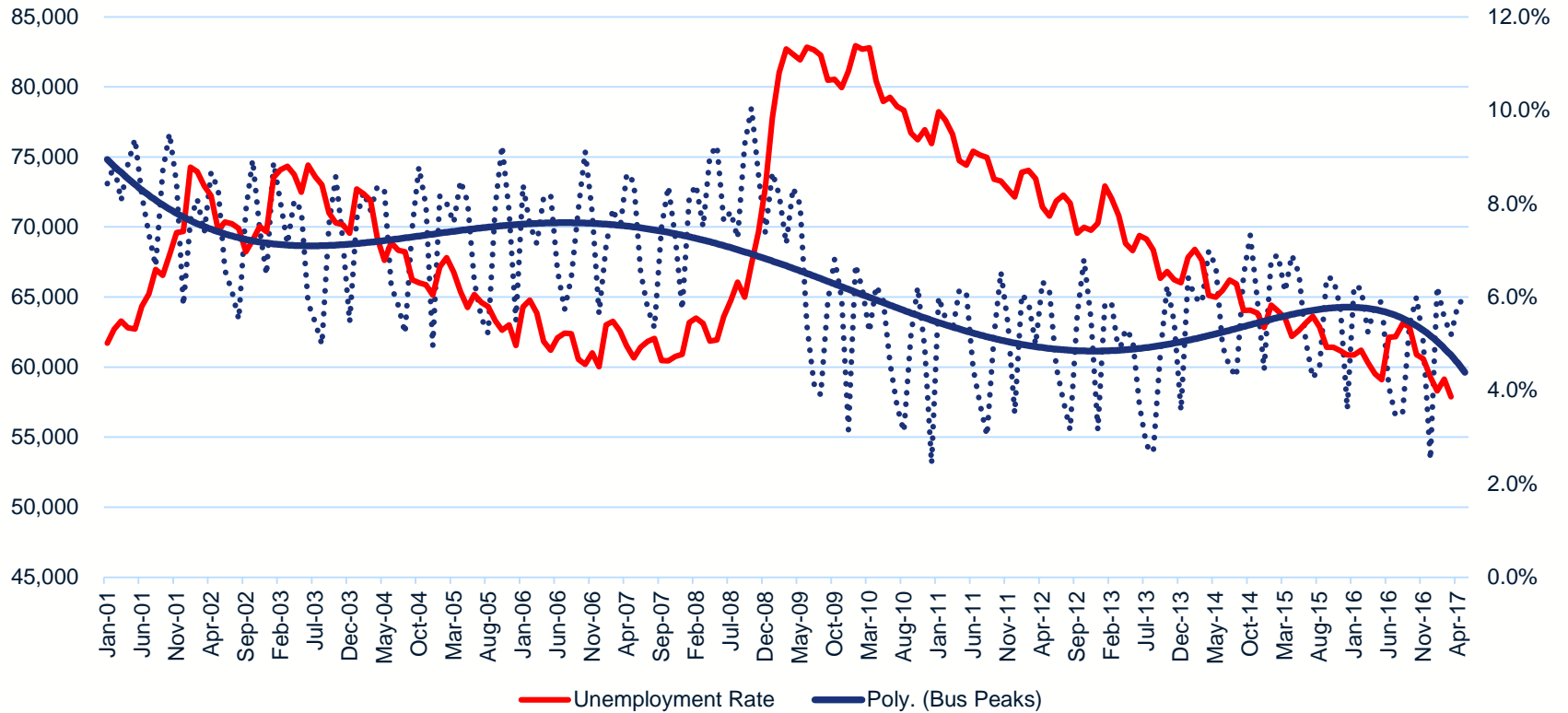
Gas Prices & Weekly Bus

2001-2017

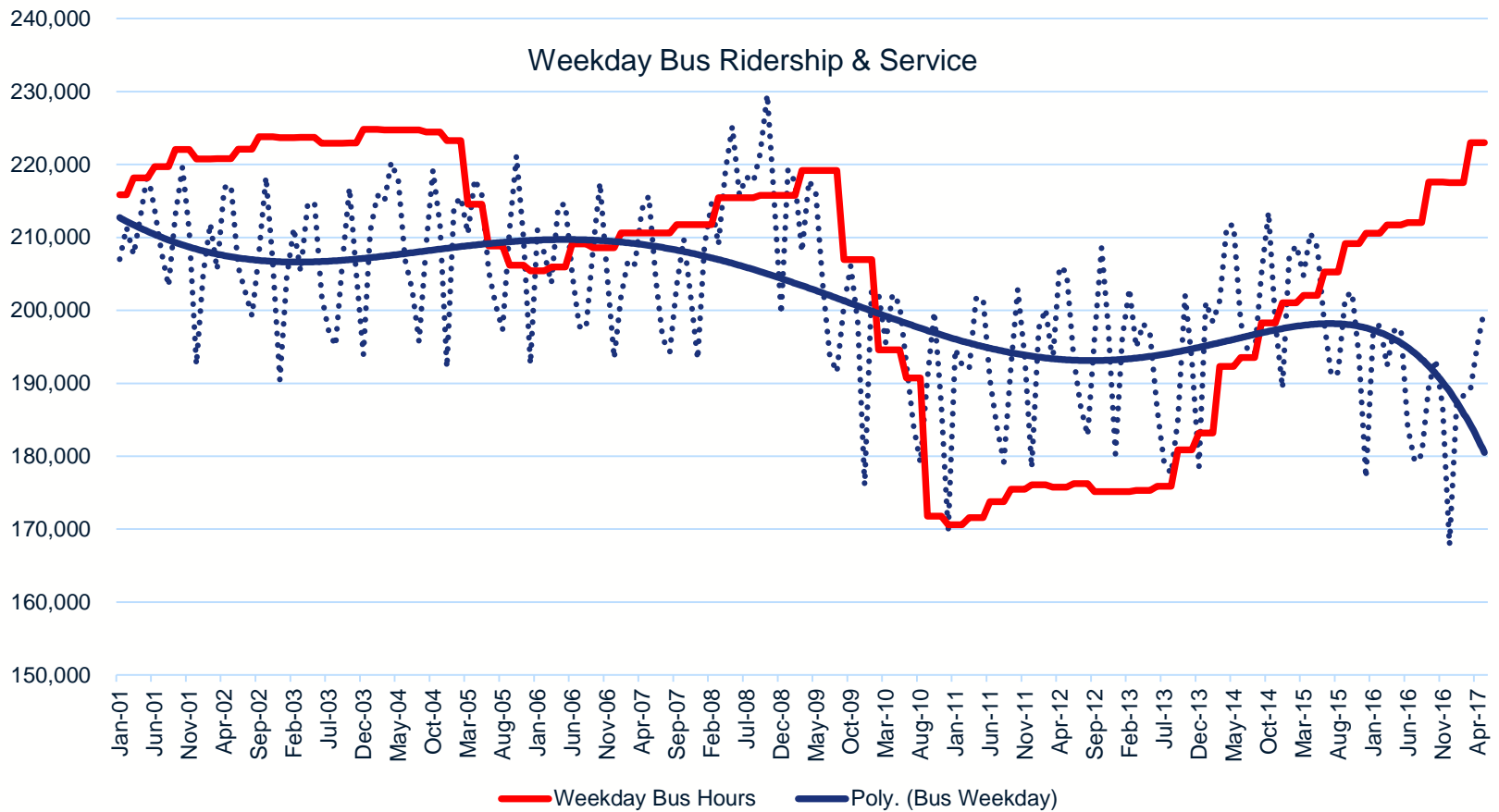


Bus Peaks and Unemployment

2001-2017

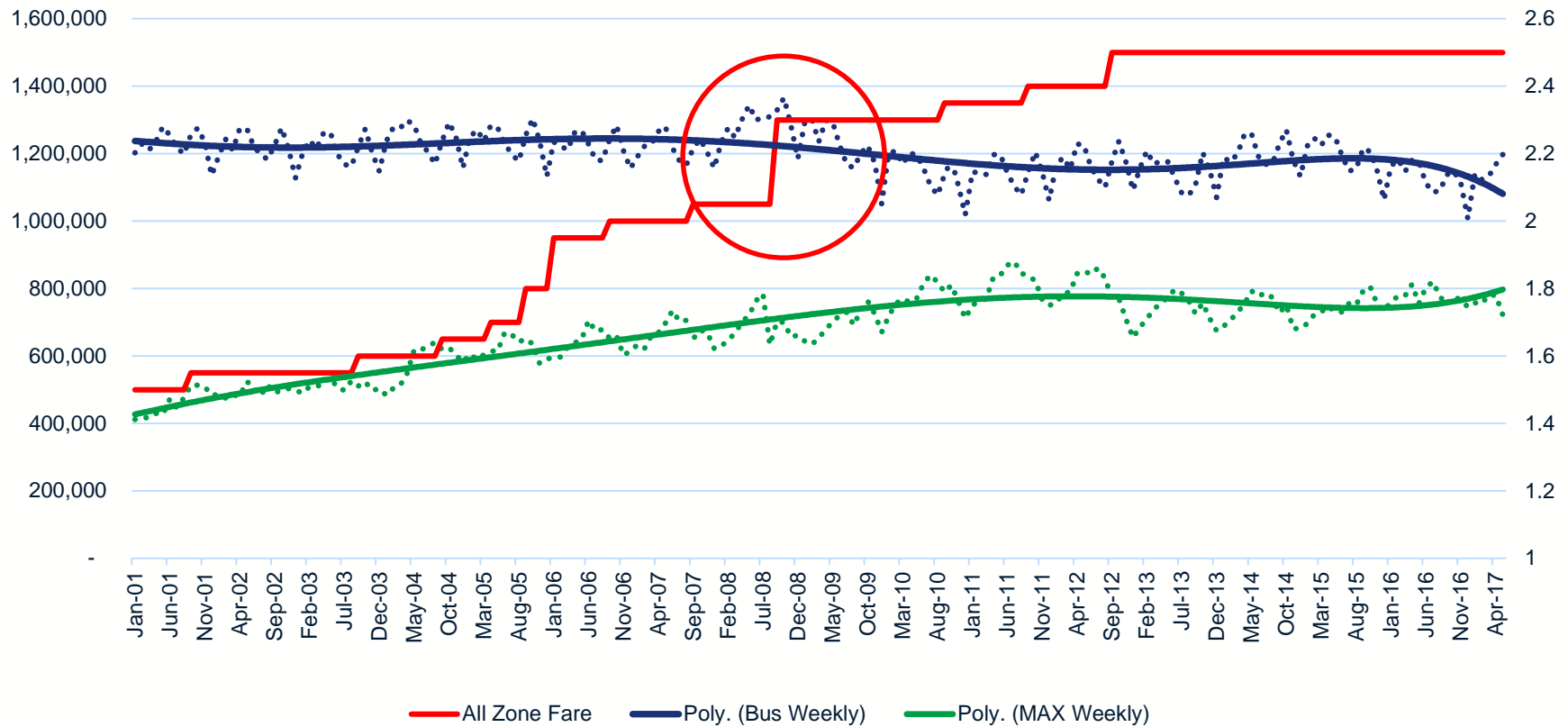


Bus Ridership & Bus Hours

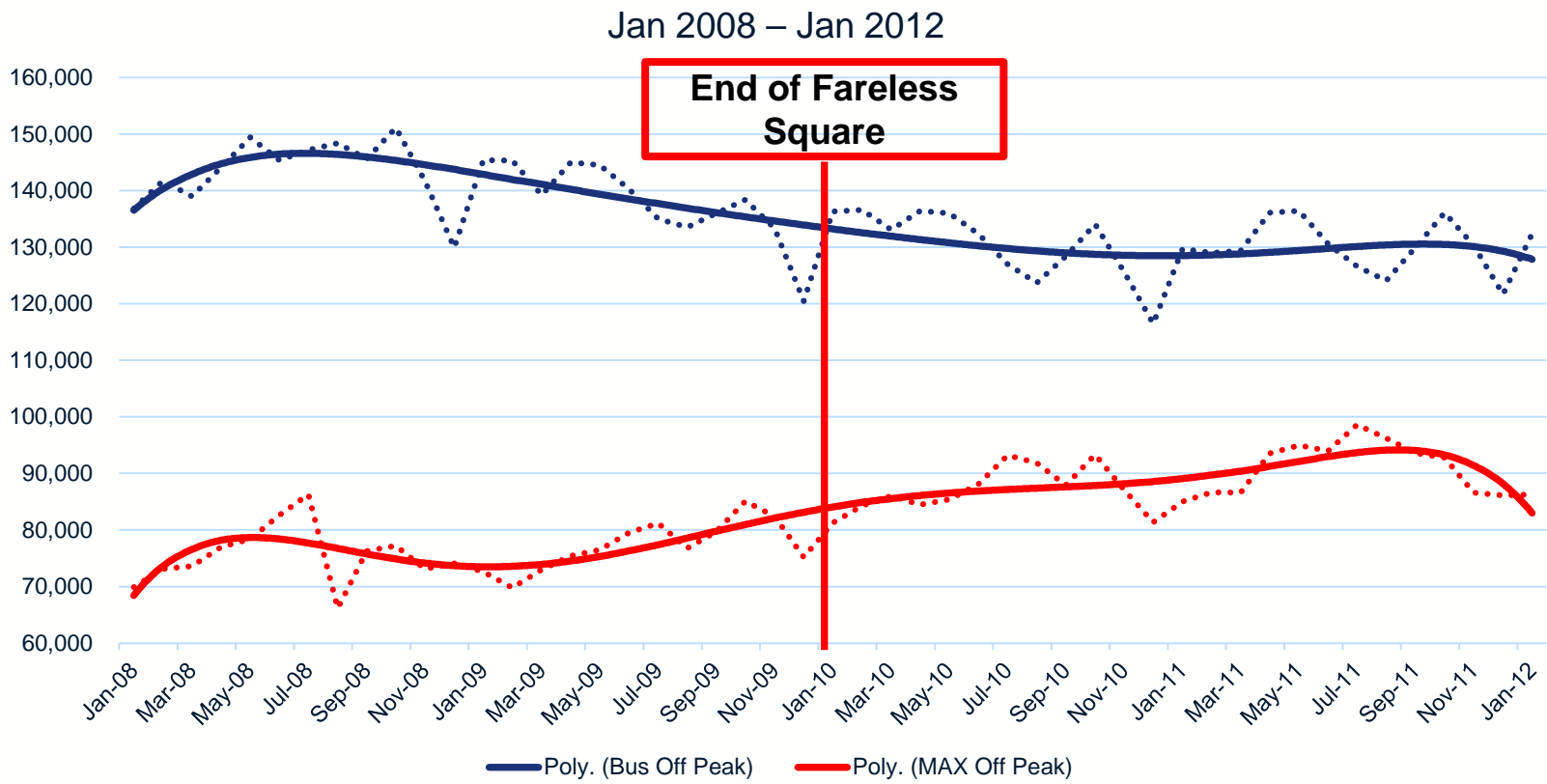


Ridership & Fares

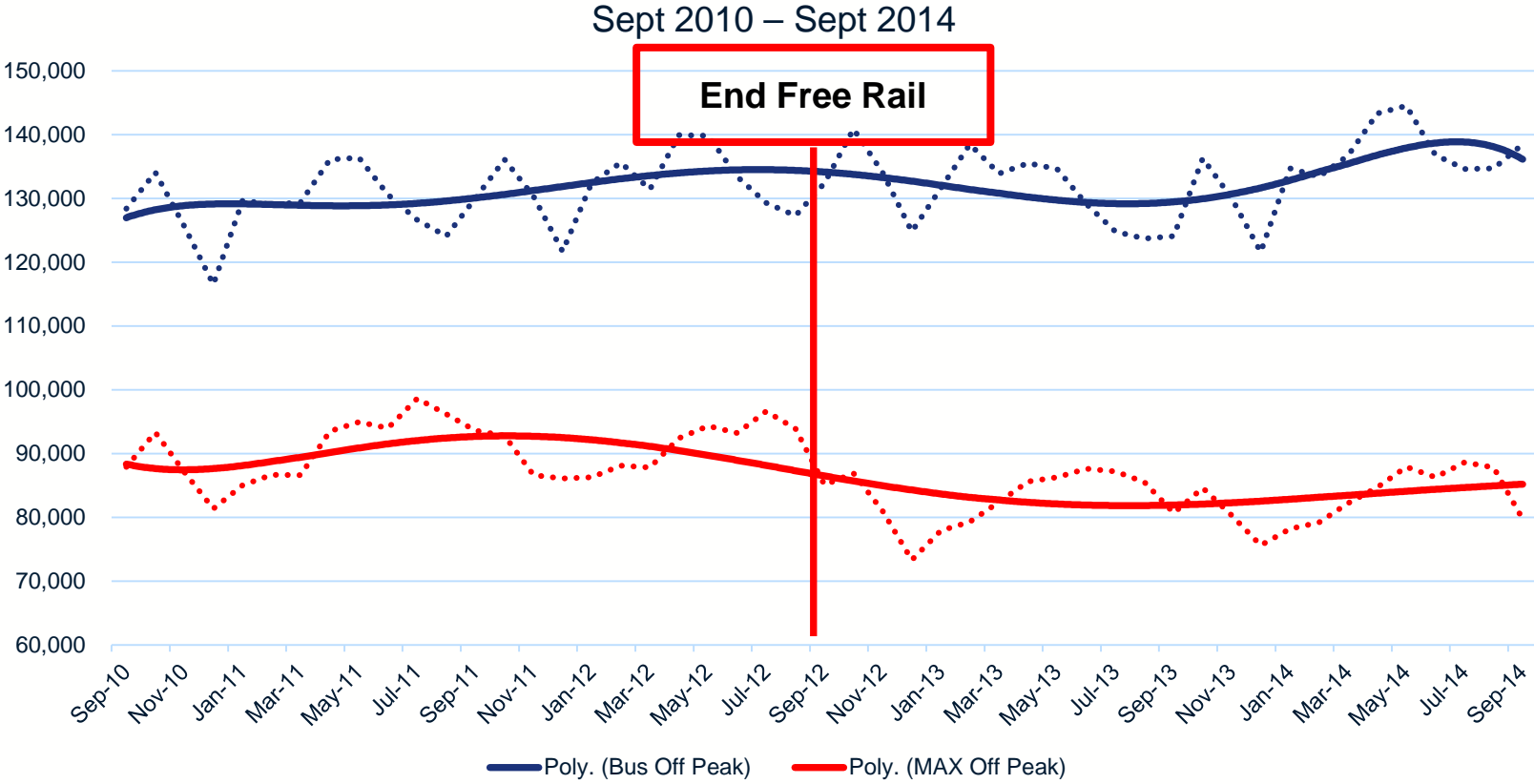
Weekly Bus and MAX Ridership & Fares



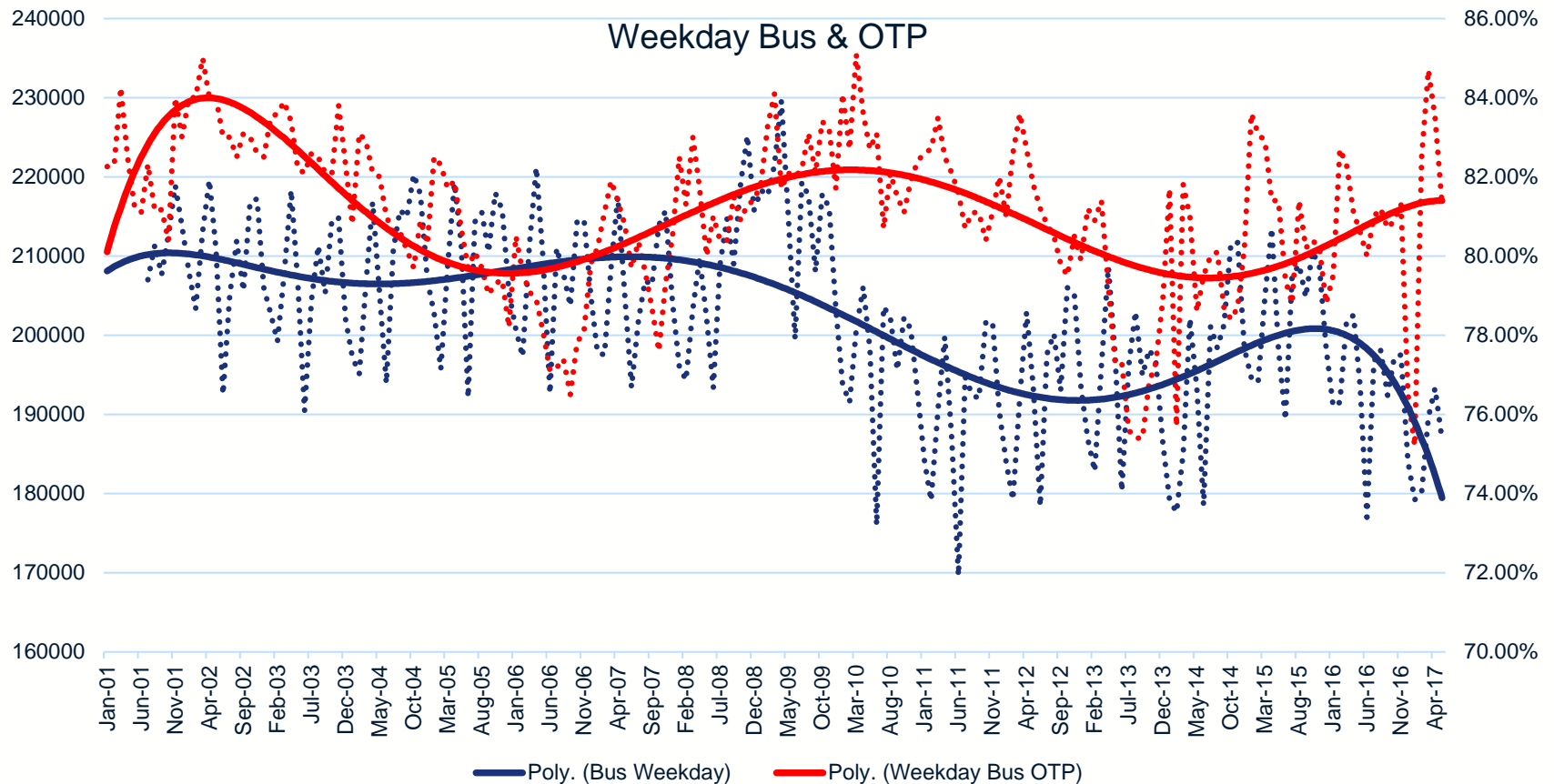
Fareless Square & Off Peak



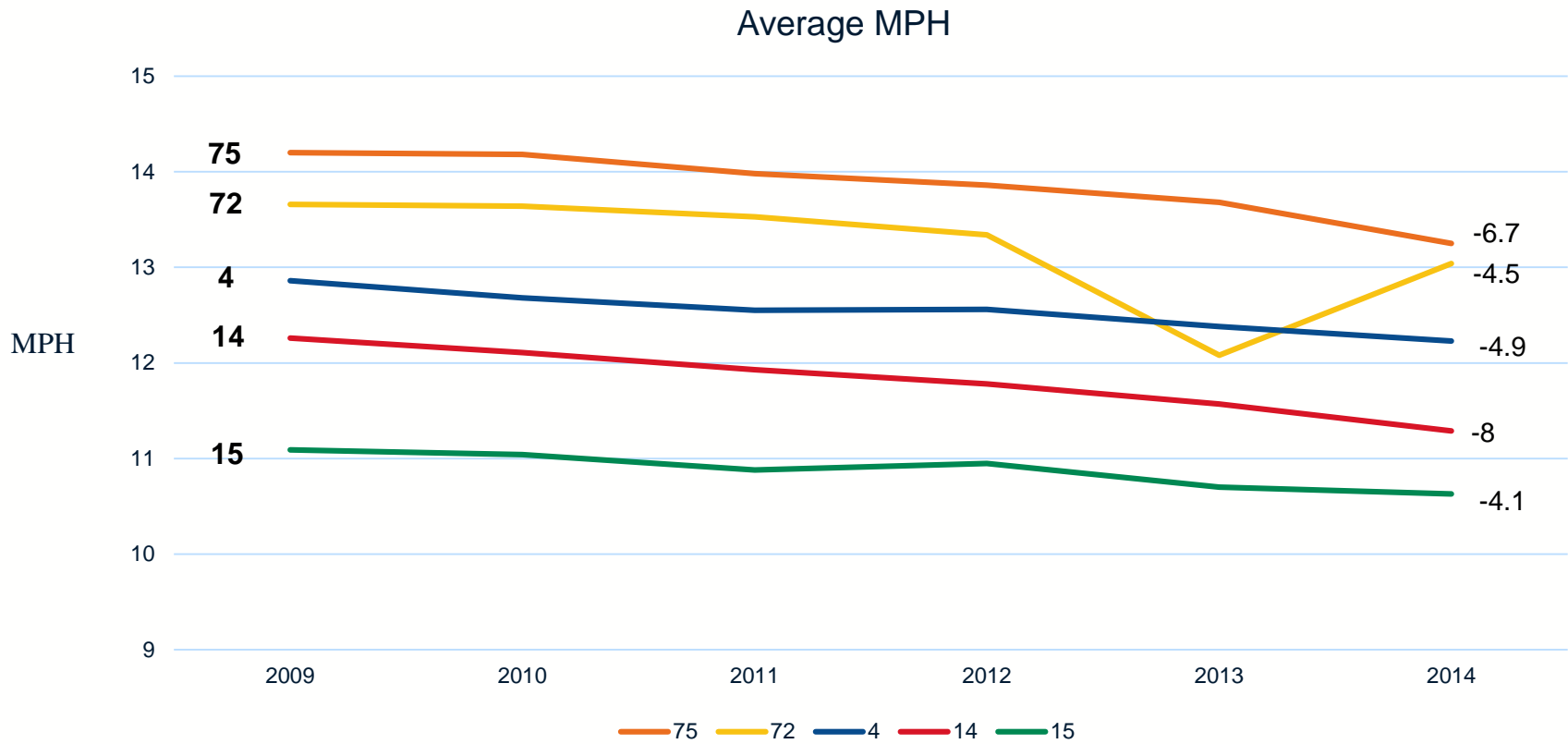
Free Rail & Off Peak



Bus and OTP 6mo Lag



Average Speed

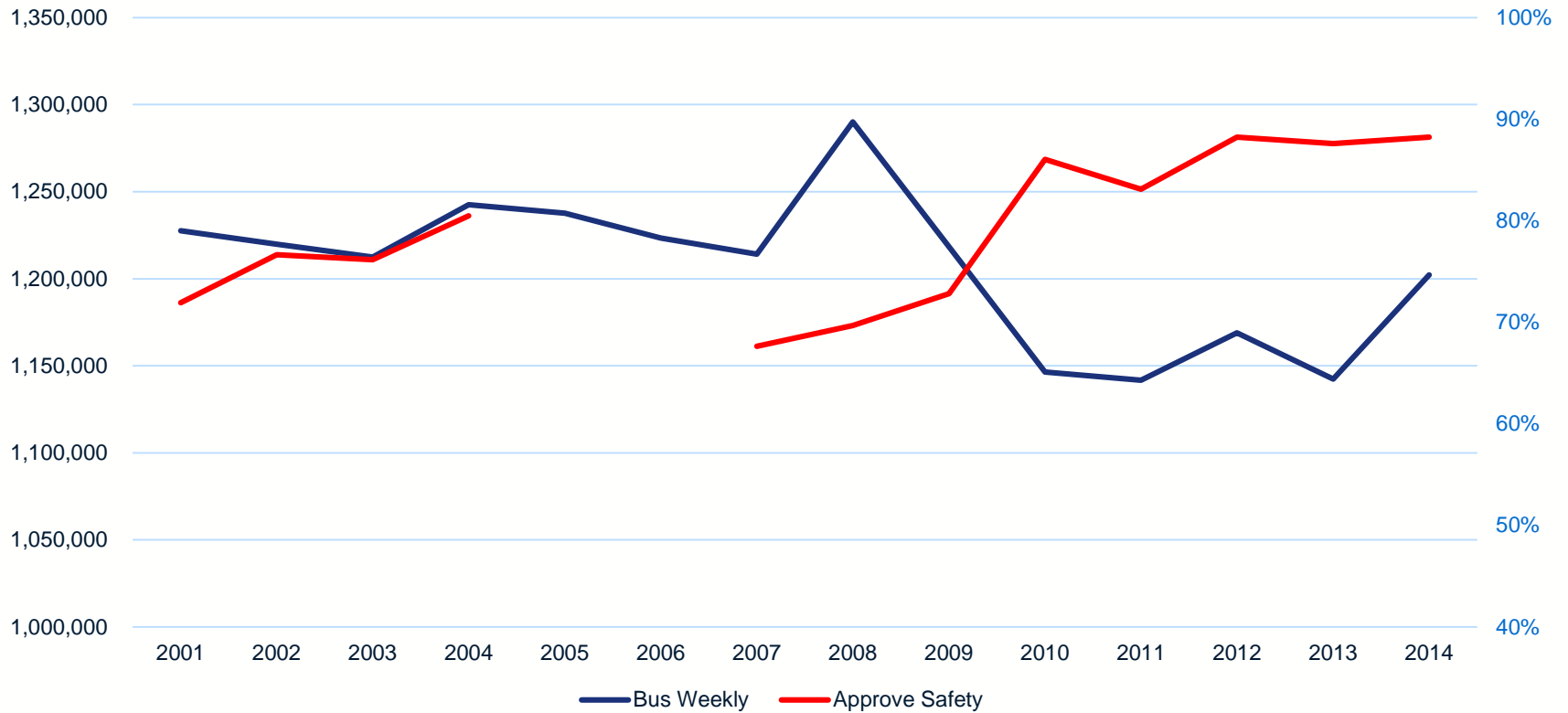


Service Quality “Index”

Route	Ridership	Reliability	Pass ups	Trip Time
	Spring Boarding Ride Change '14-'16	Spring OTP '14-'16	Spring Average Over Capacity '14-'16	Spring Average Increase in Run Time '14-'16
78-Beaverton/Lake Oswego	-14%	80%	2%	1%
75-Lombard/39th (Cesar Chavez)	-11%	81%	3%	1%
44-Capitol Hwy/Mocks Crest	-10%	88%	13%	1%
52-Farmington/185th	-10%	82%	3%	4%
76-Beaverton/Tualatin	-10%	87%	1%	1%
33-McLoughlin	-8%	76%	4%	
56-Scholls Ferry Rd	-8%	79%	7%	2%
72-Killingsworth/82nd	-8%	80%	8%	2%
14-Hawthorne	-8%	83%	6%	-1%
70-12th Ave	-8%	86%	2%	7%
71-60th Ave/122nd Ave	-8%	83%	3%	5%
17-Holgate/NW 21st	-7%	80%	12%	4%
15-Belmont/NW 23rd	-7%	81%	7%	11%
35-Macadam/Greeley	-7%	83%	9%	0%
4-Division/Fessenden	-7%	84%	20%	3%
62-Murray Blvd	-7%	86%	0%	4%
19-Woodstock/Glisan	-7%	80%	6%	6%
77-Broadway/Halsey	-6%	74%	3%	2%
21-Sandy Blvd/223rd	-5%	88%	0%	2%
9-Powell/Broadway	-4%	80%	9%	9%
20-Burnside/Stark	-4%	80%	9%	3%

Weekly Bus & Safety Approval

2001-2014

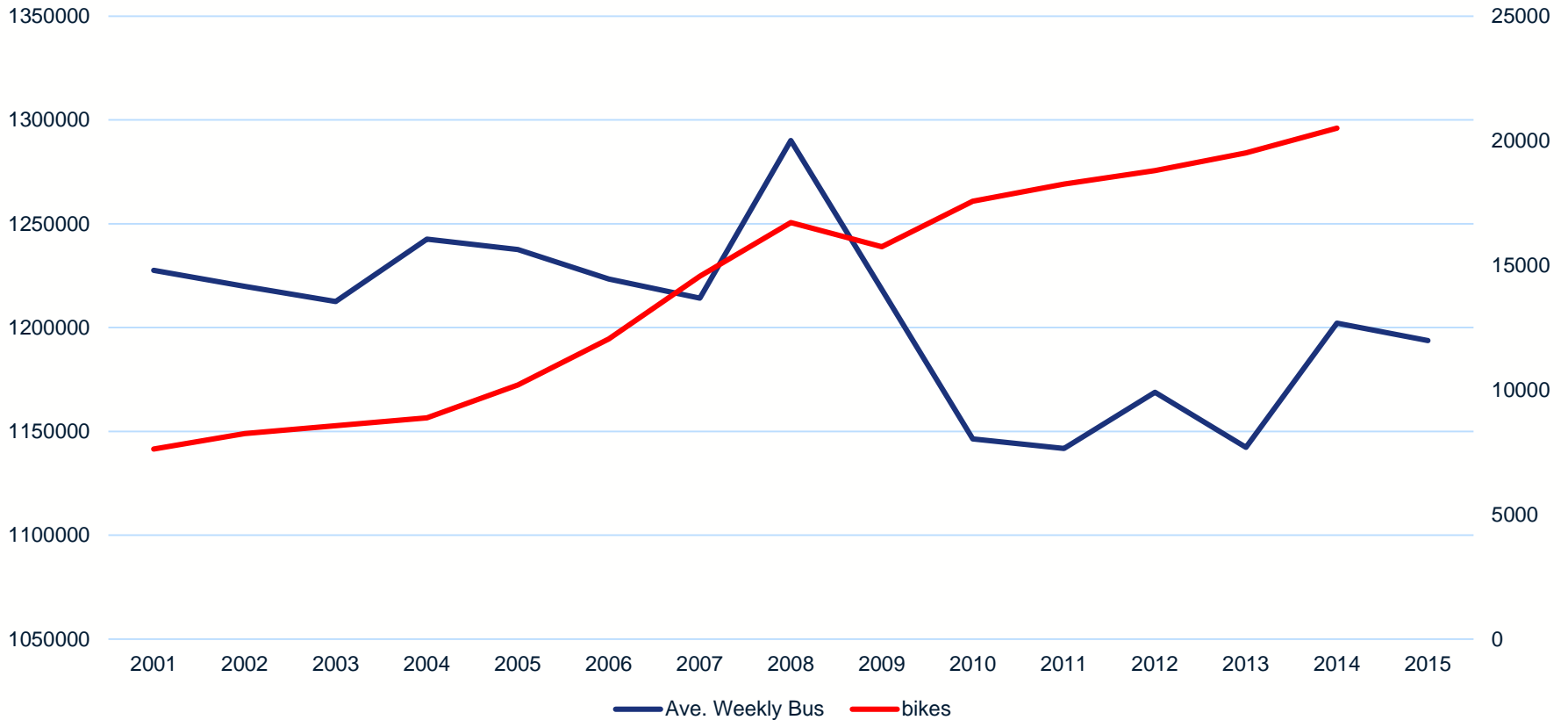


Weekly Streetcar & Bus

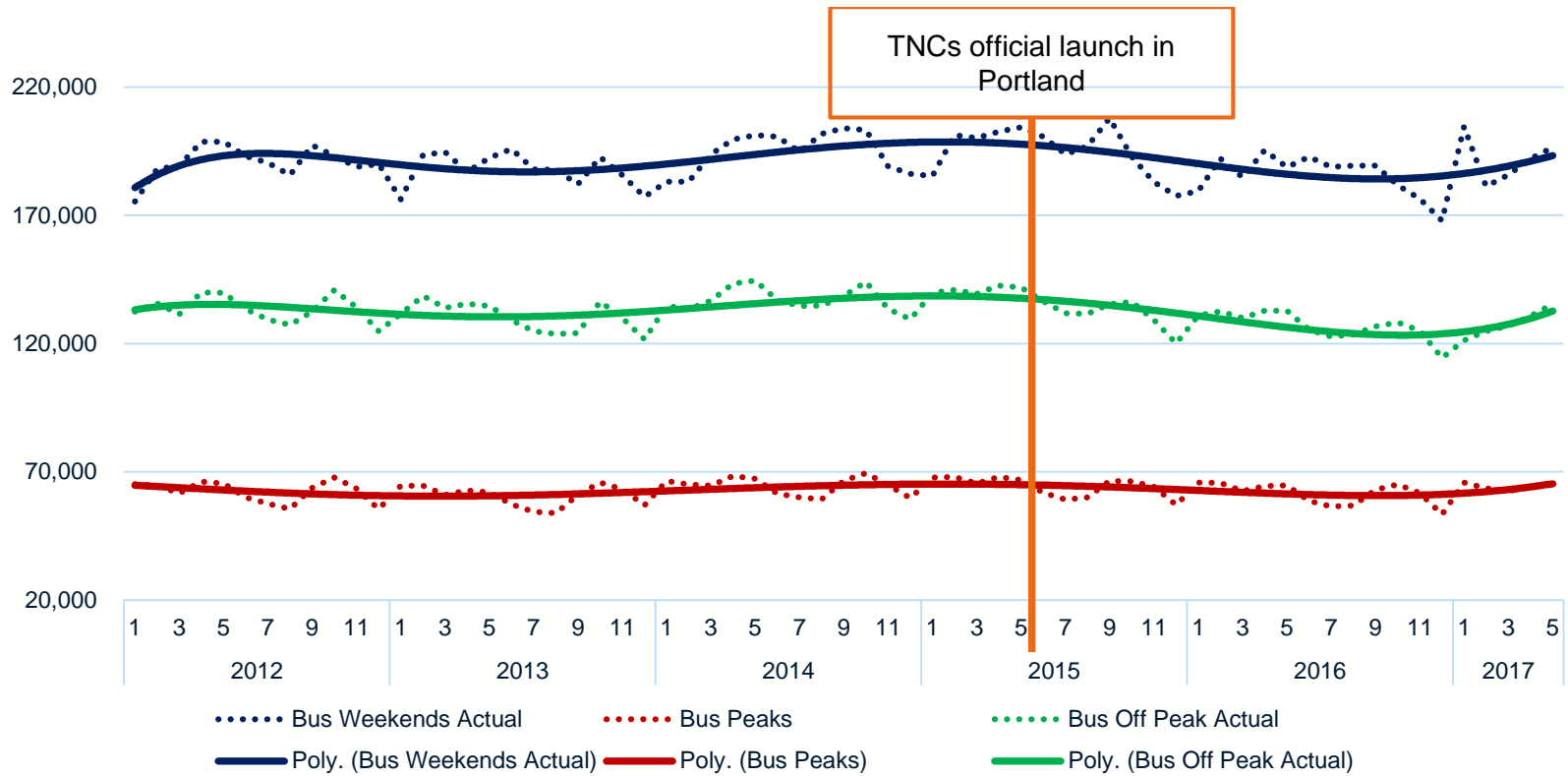


Bike Counts & Bus

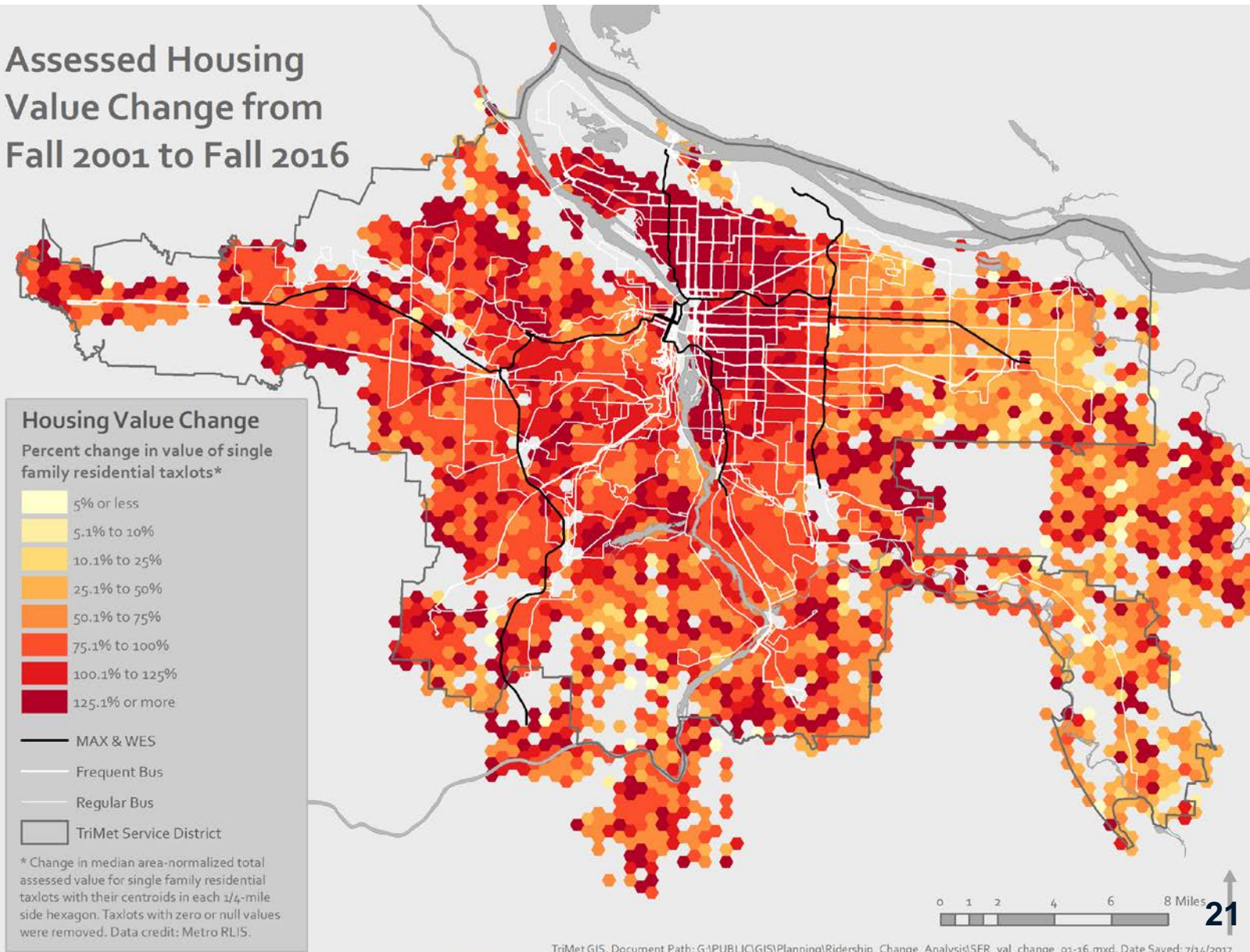
2001 - 2015



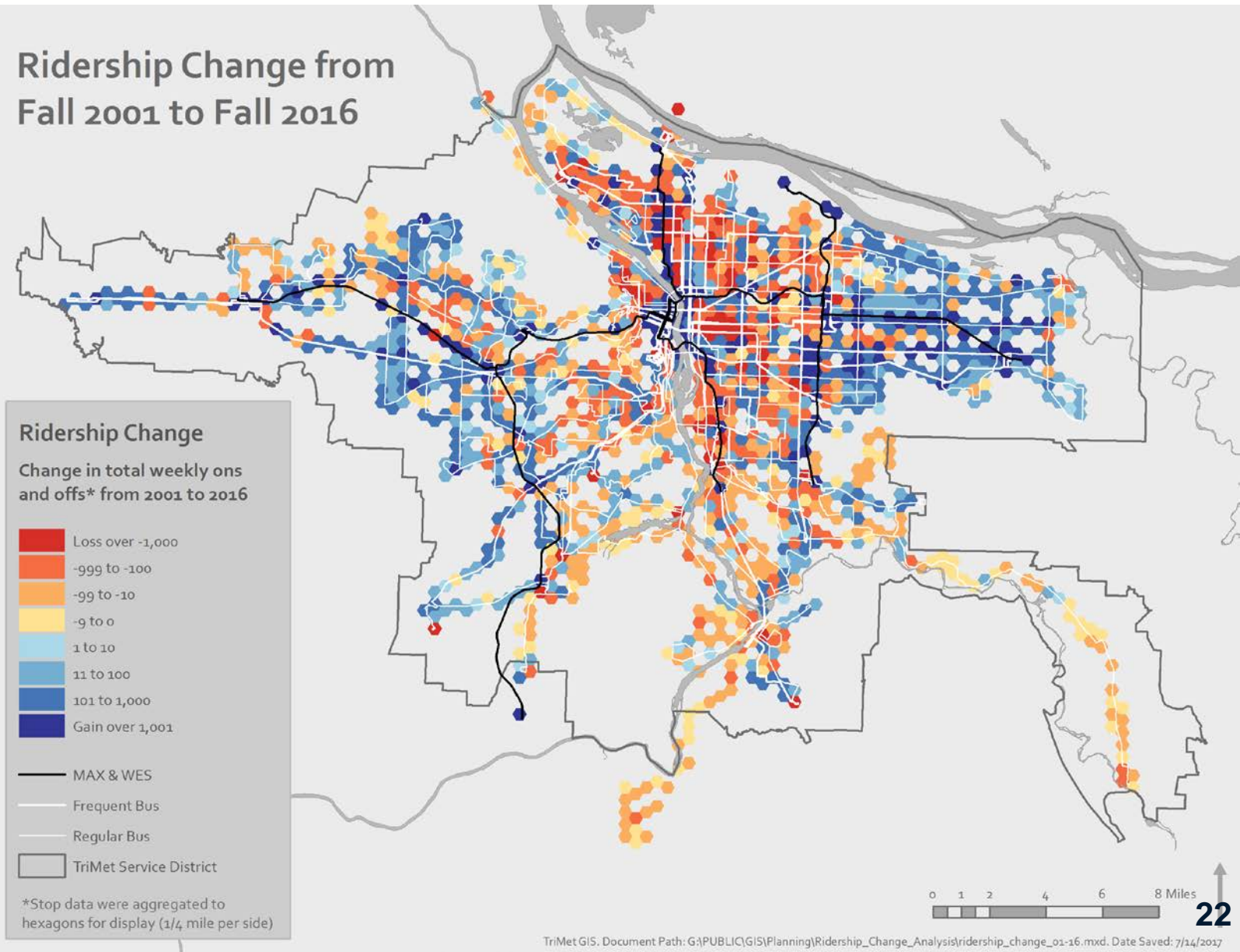
TNCs & Bus



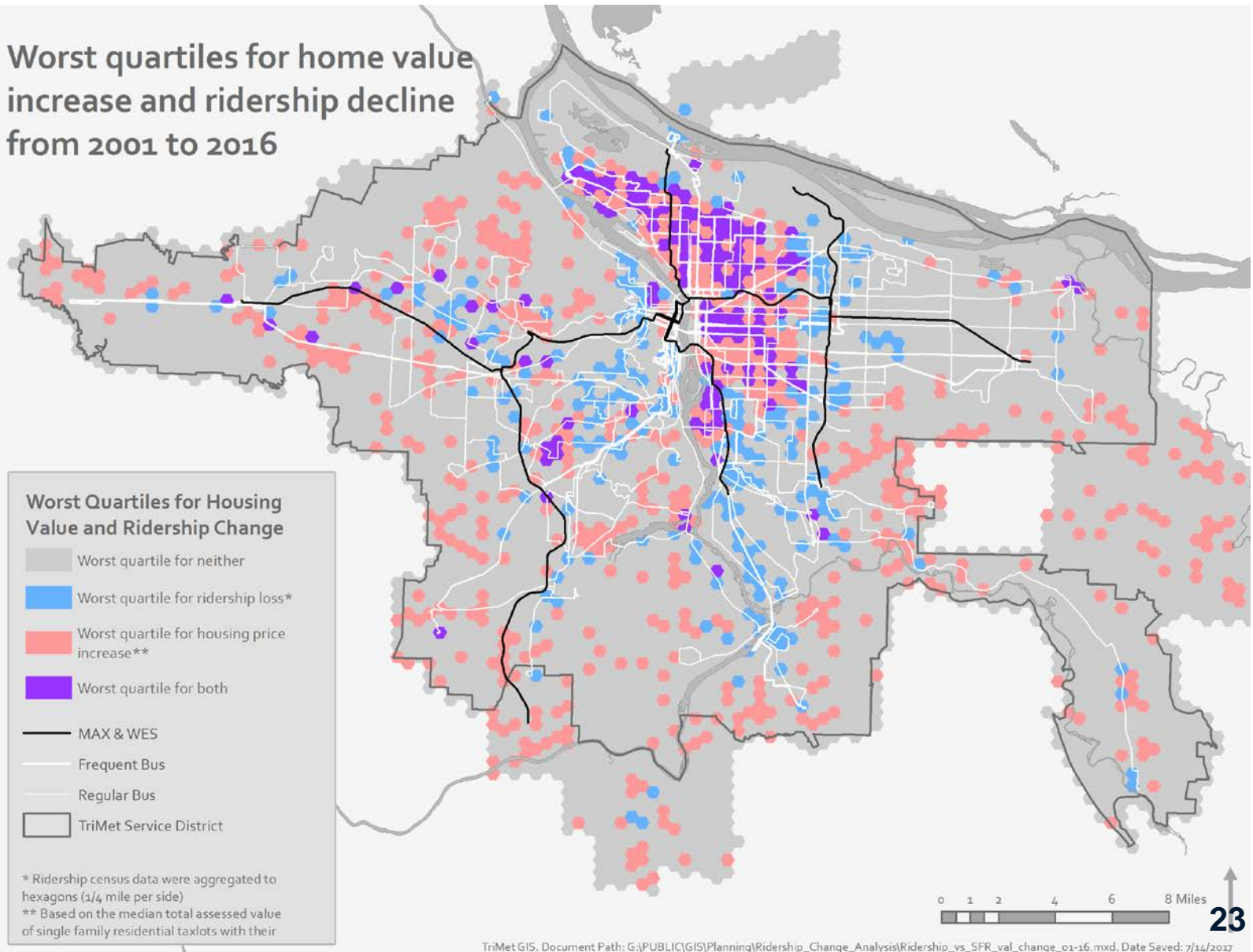
Assessed Housing Value Change from Fall 2001 to Fall 2016



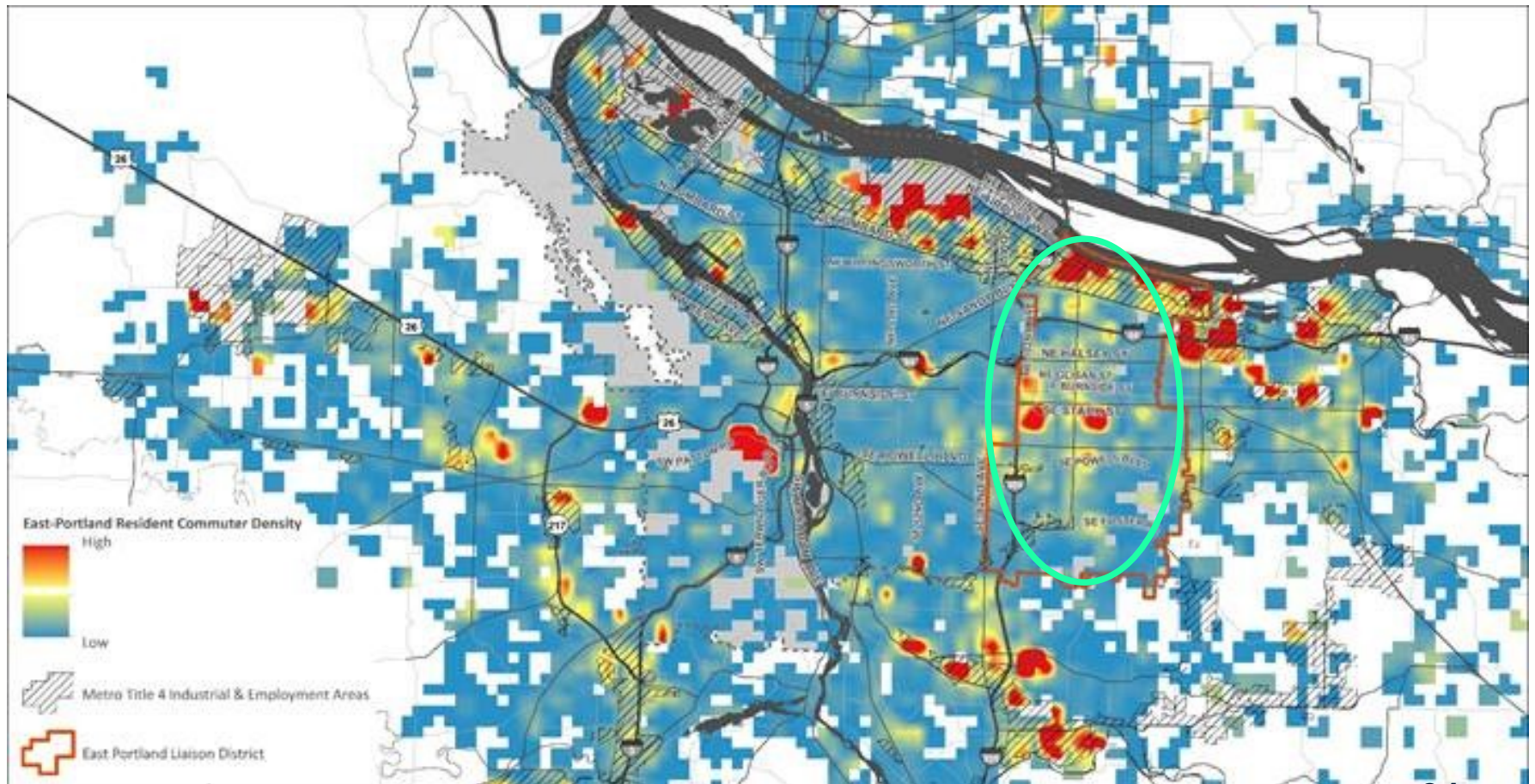
Ridership Change from Fall 2001 to Fall 2016



Worst quartiles for home value increase and ridership decline from 2001 to 2016

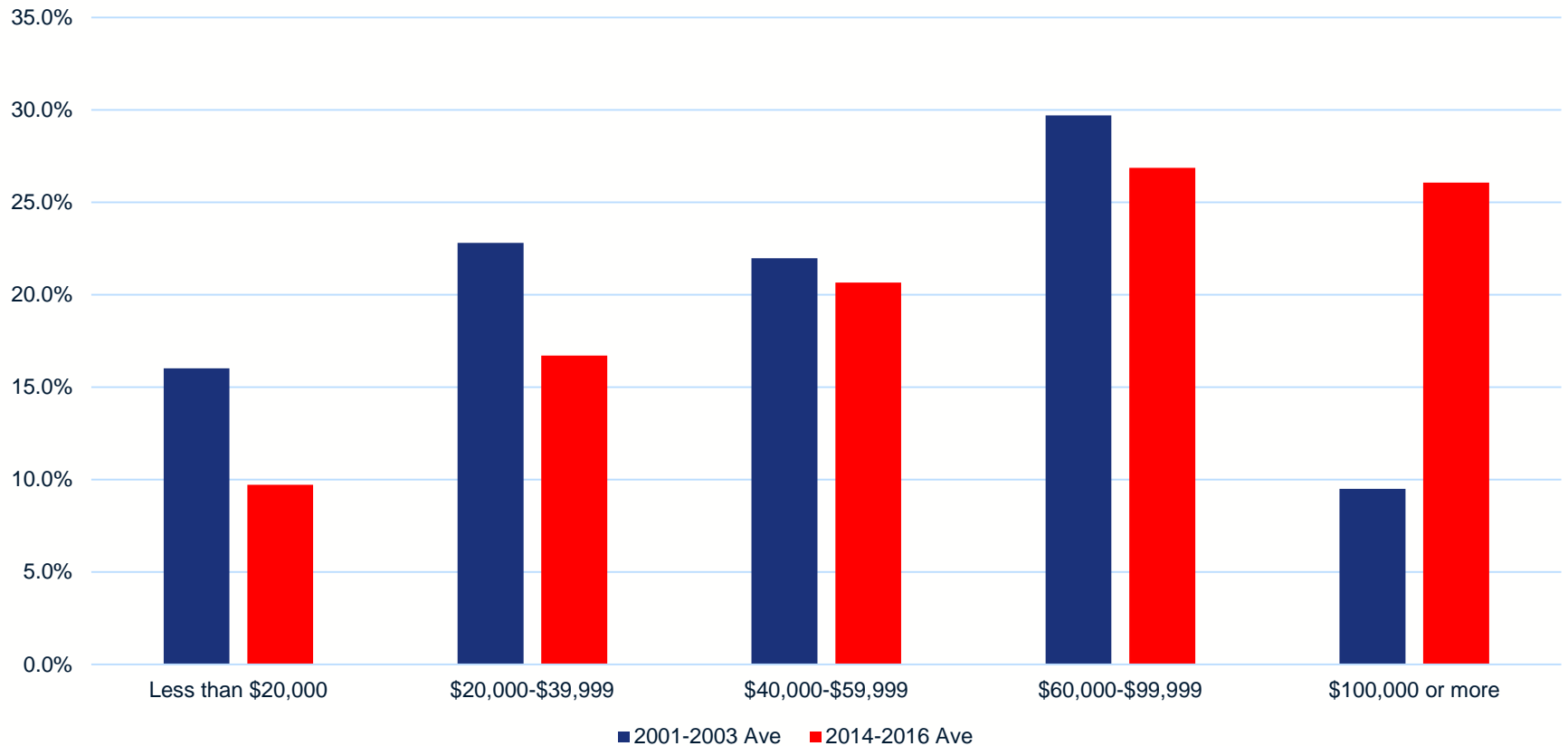


Where East Portlanders Work



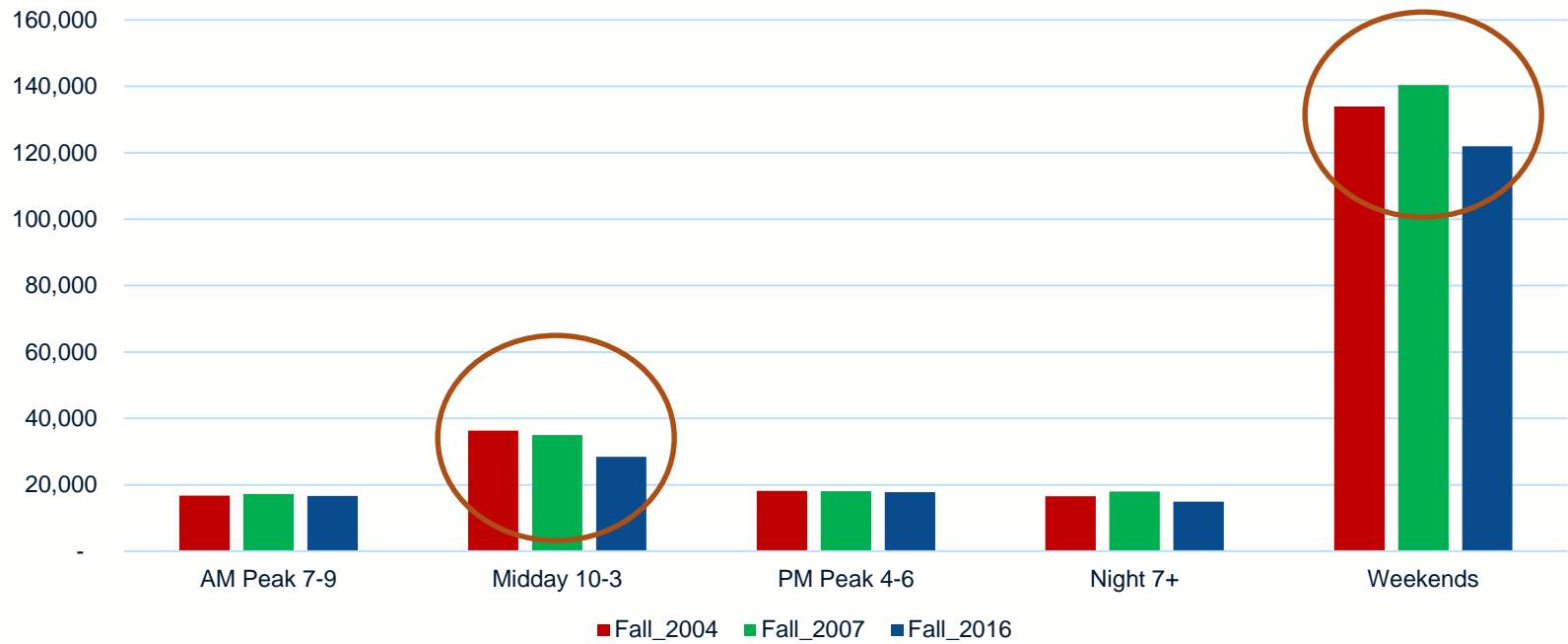
Ridership Income

Ridership Average Income (not adjusted for inflation) A&A



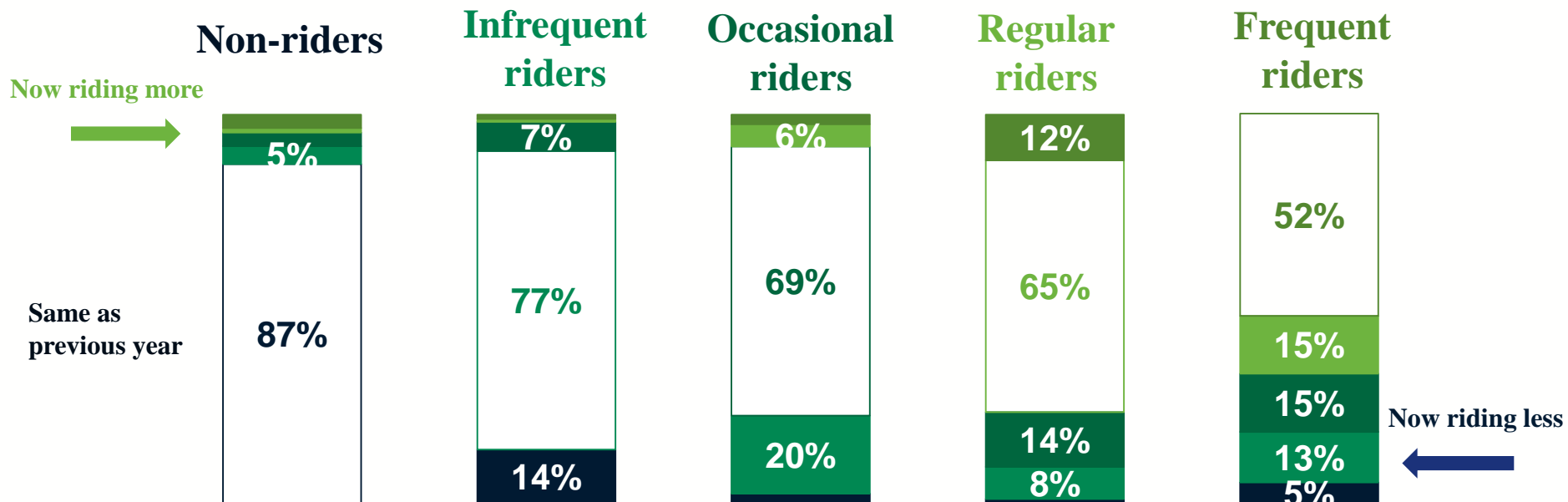
Downtown Travel

Trips to Downtown Core



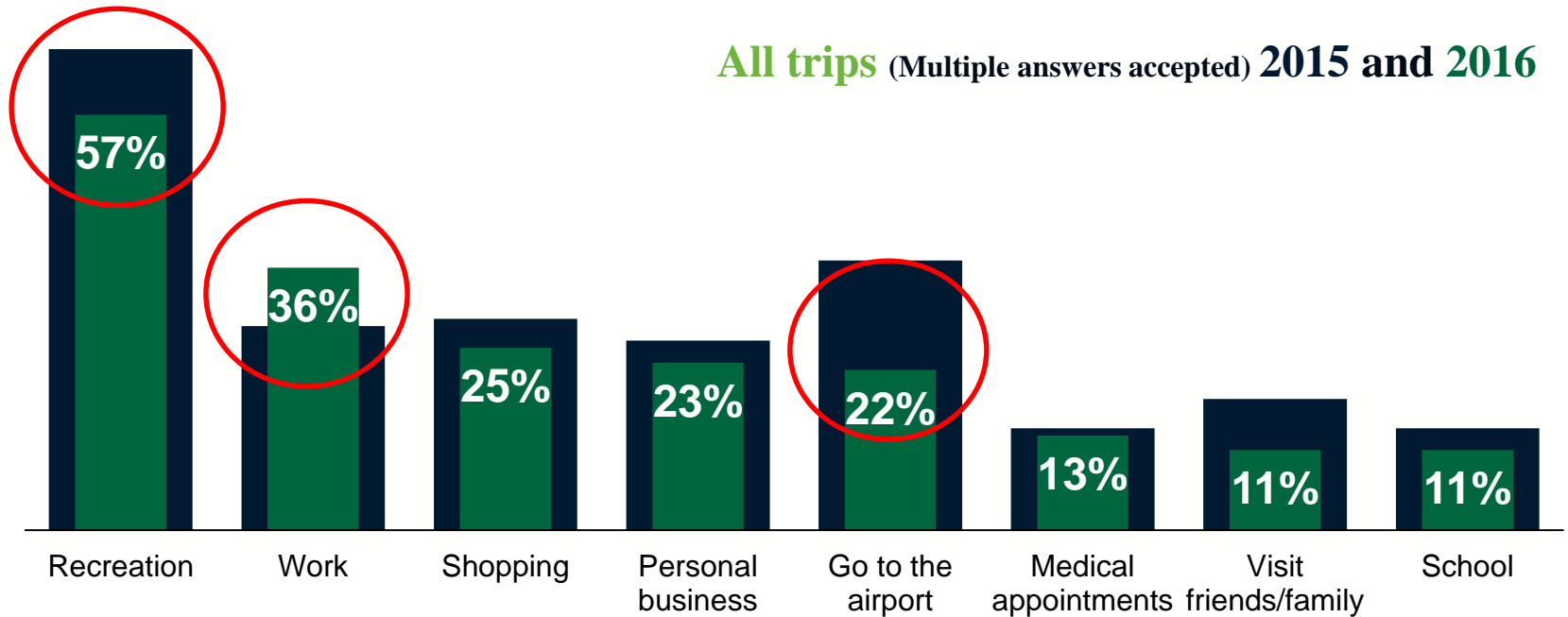
Most Ride the Same as Last Year

2016 A&A



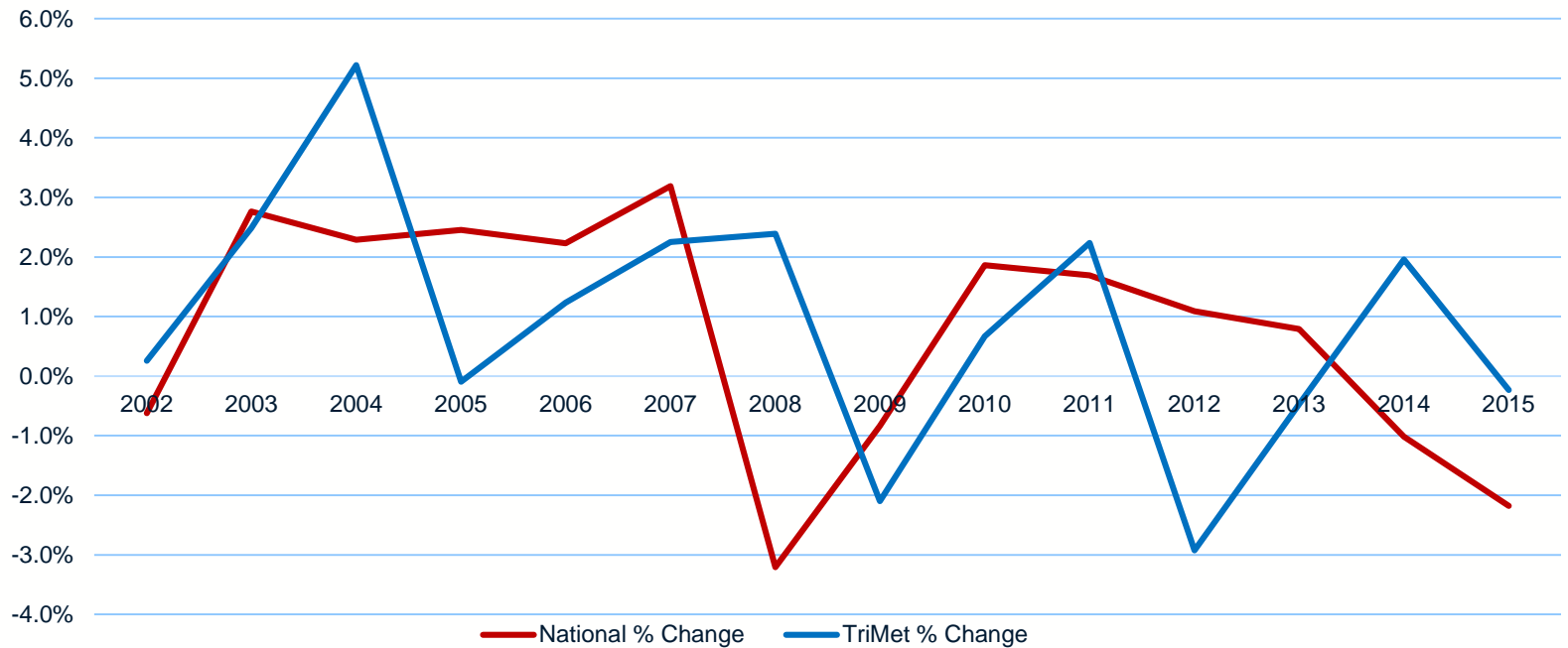
Change in Trip Purpose vs Last Year

All trips (Multiple answers accepted) 2015 and 2016



Ridership and National Trends

Change in National vs TriMet Ridership



Interim Conclusions

- Light rail healthy
- Bus peak hour steady
- Off peak and weekend bus a concern
- Many factors at play
- Demography and geography
- Speed, convenience, reliability

Strategies

- Adding service to lower cost housing & connecting to job centers (SEP)
- Speeding travel & improving OTP (Enhanced Transit)
- Integrating services (e.g. Hop, TNCs, bike share)
- Customer research, marketing & incentives