



TriMet Board Update:
Trends in Transit & Market Analysis Results
March 23

Trends in Transit & Market Analysis

What we'll cover today:

- Transit existing conditions
- Trends and Potential Strategies
- Market Analysis



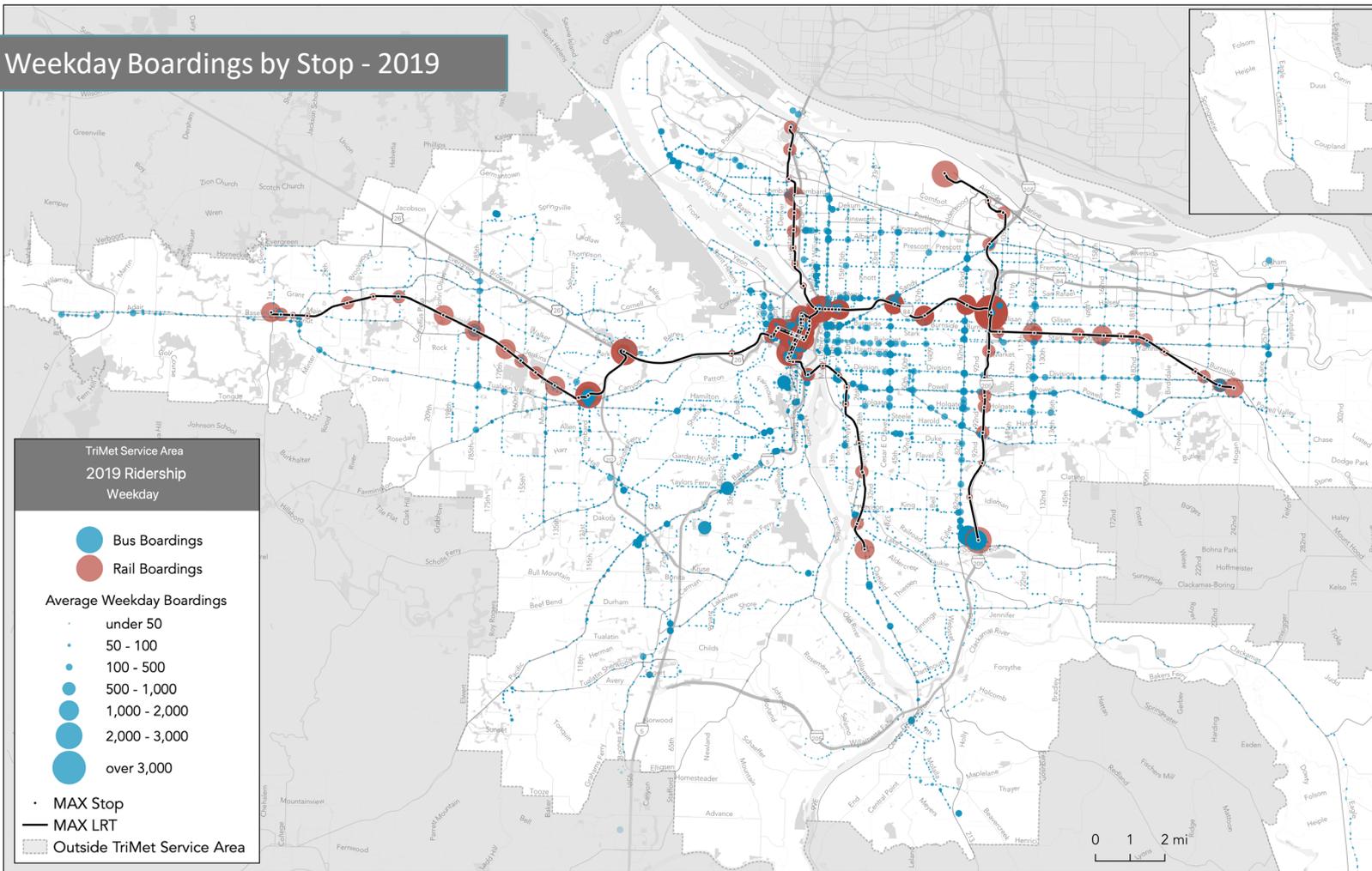
TRANSIT EXISTING CONDITIONS

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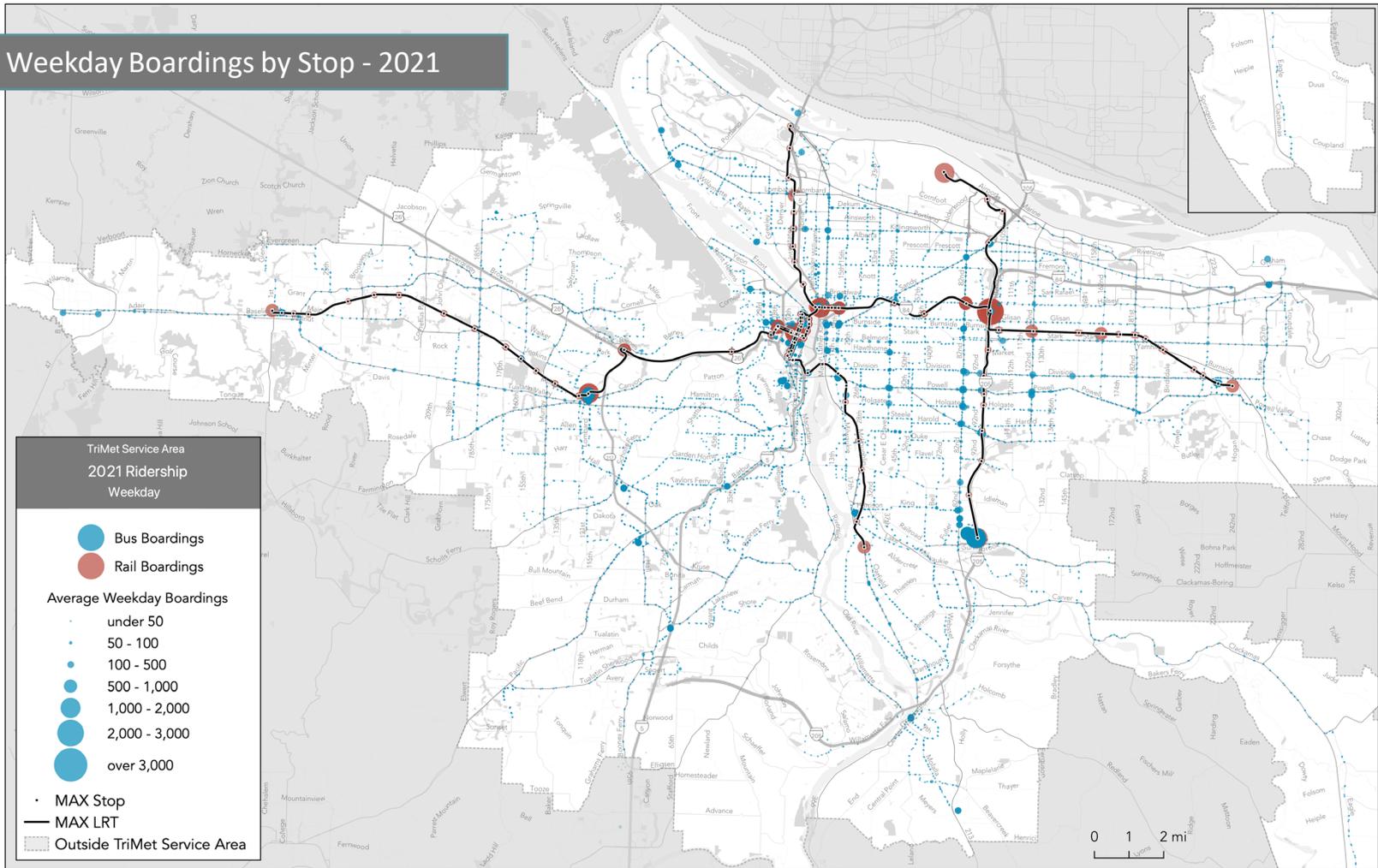
- Detailed analysis of the TriMet network, covering:
 - Forward Together design and evaluation approach
 - Key design principles and network development since the recession
 - How have service and ridership changed since 2019?

....and more! Today is just a preview.

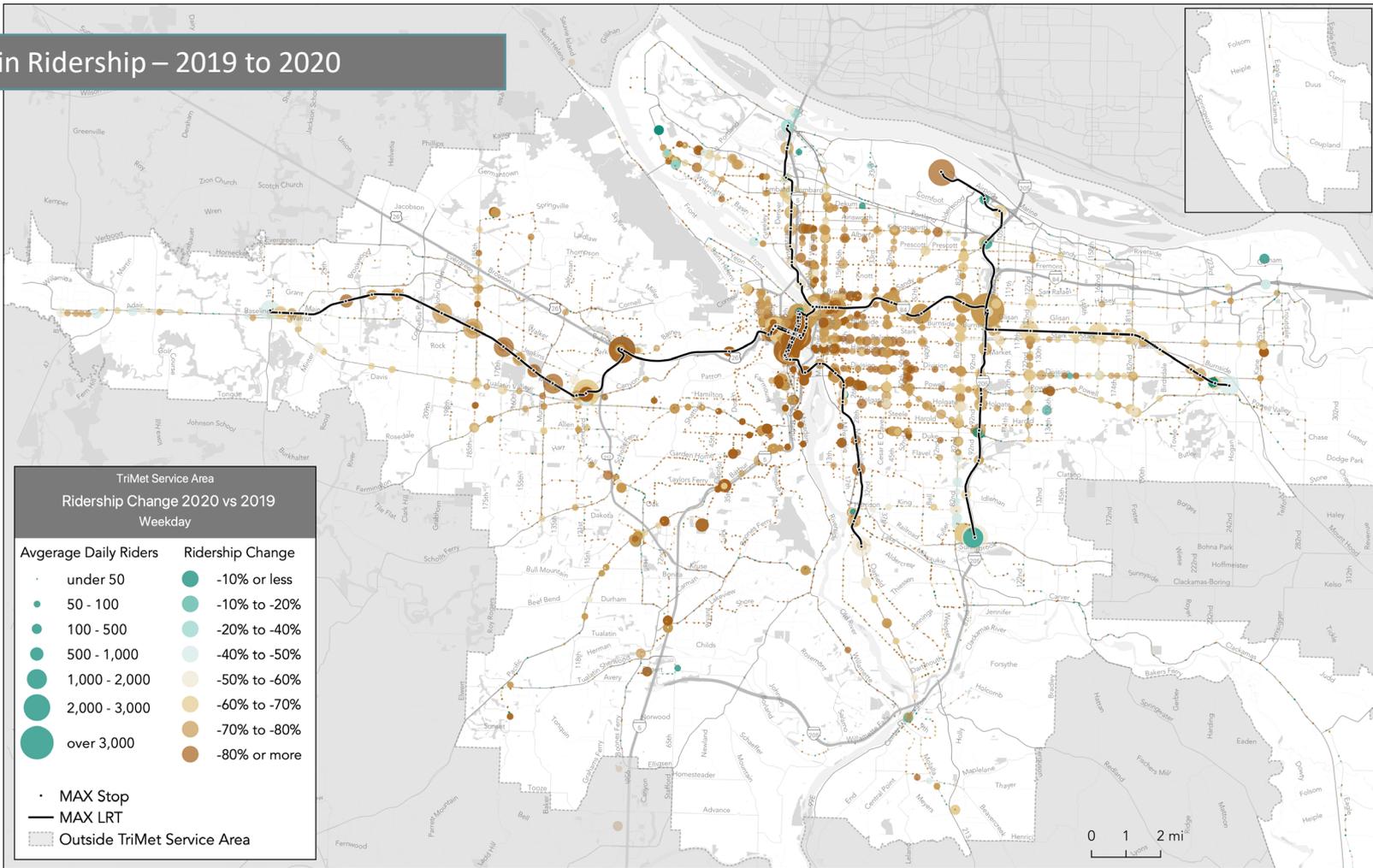
Average Weekday Boardings by Stop - 2019



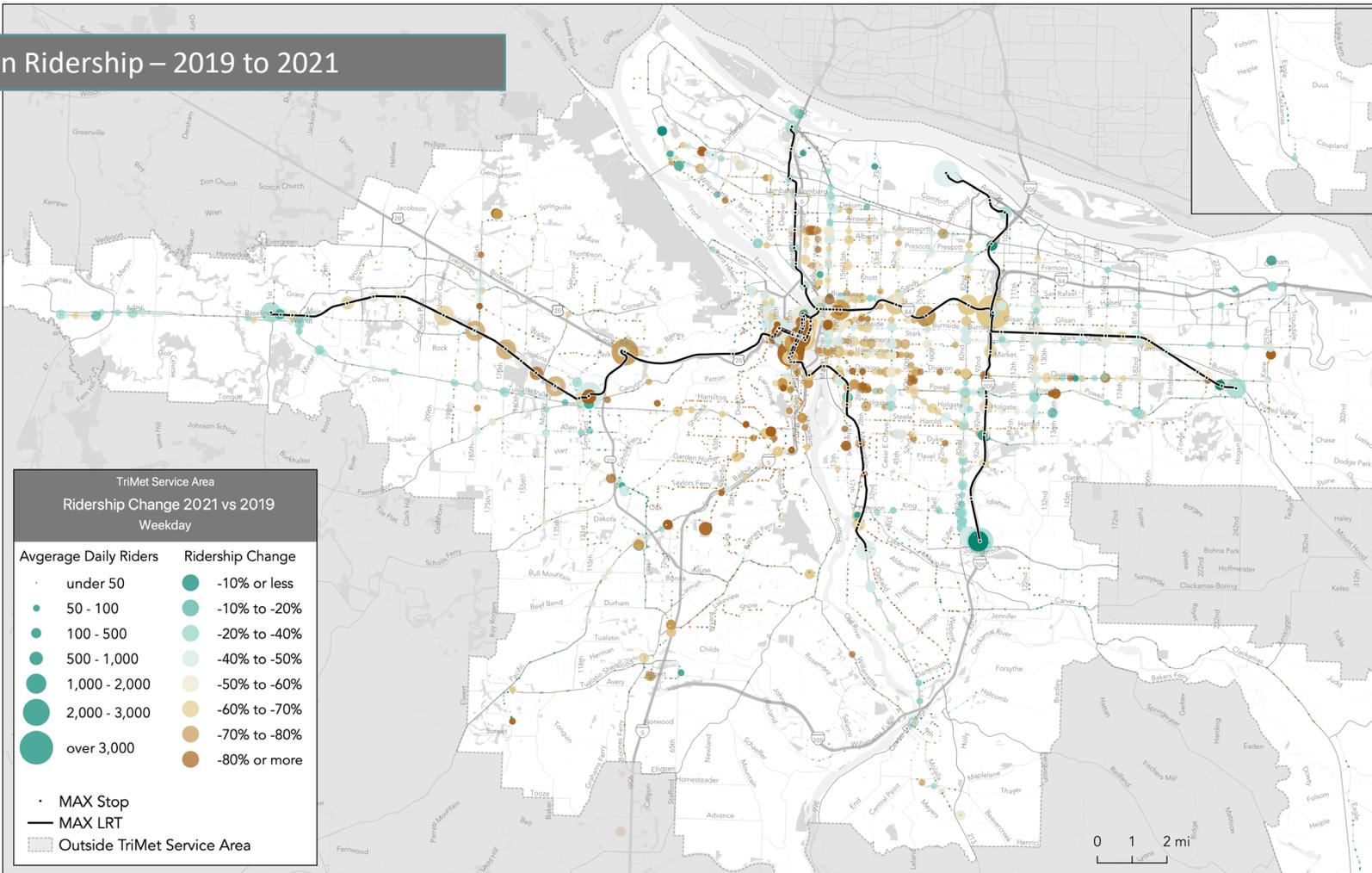
Average Weekday Boardings by Stop - 2021



Change in Ridership – 2019 to 2020

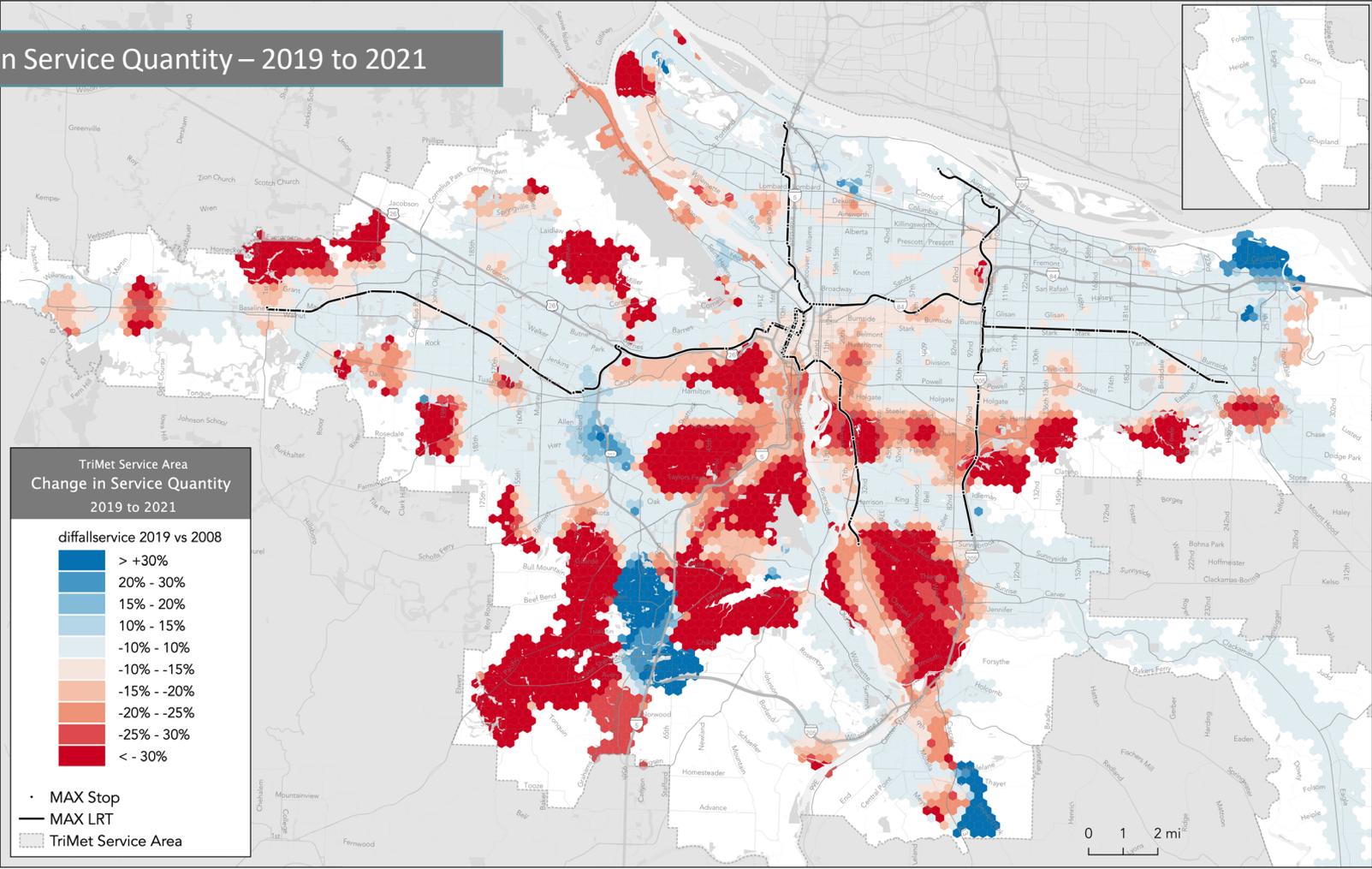


Change in Ridership – 2019 to 2021



0 1 2 mi

Change in Service Quantity – 2019 to 2021

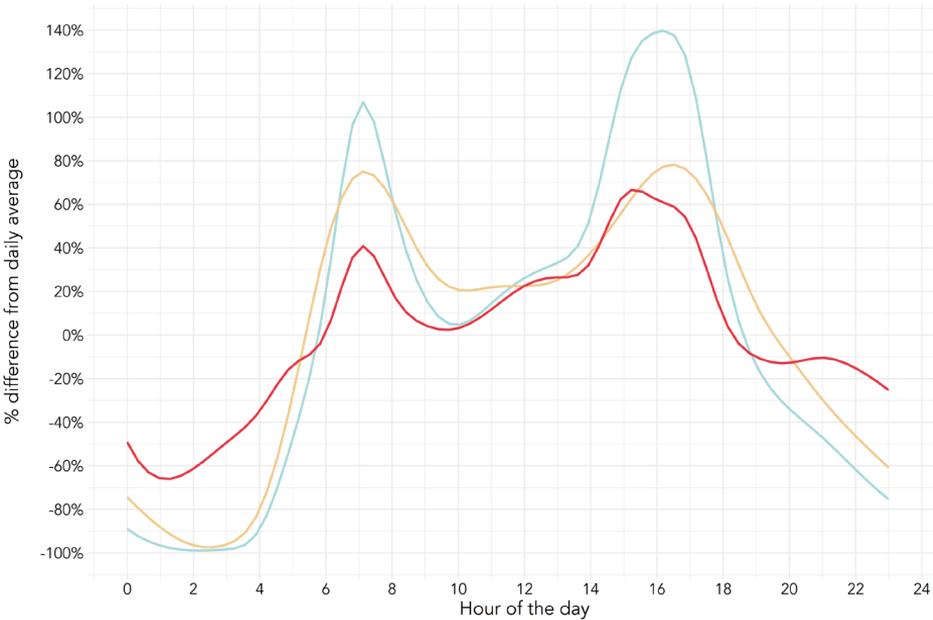


Service and Ridership by Time of Day

TriMet Service and Ridership - 2019

Weekday

— Boardings — Bus trips — Boardings per bus trip

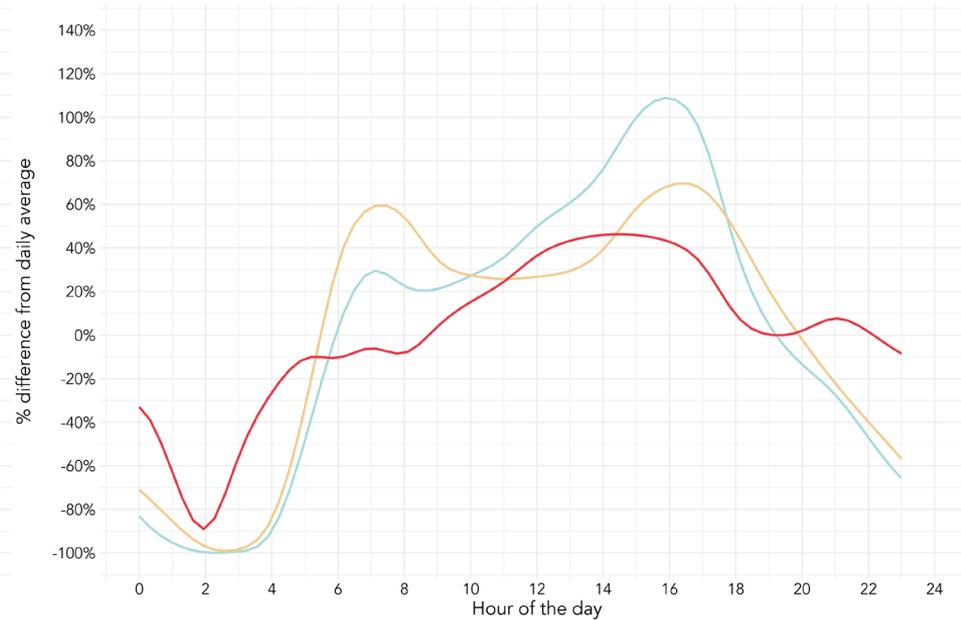


Source: TriMet boardings data and GTFS from Fall 2019

TriMet Service and Ridership - 2021

Weekday

— Boardings — Bus trips — Boardings per bus trip



Source: TriMet boardings data and GTFS from Fall 2021



TRENDS & POTENTIAL STRATEGIES

OVERVIEW OF TRENDS

1. Decline of peak commute demand
2. Transit ridership has declined more than other modes
3. Travel has declined less for less-educated and lower income populations
4. Concerns about potential COVID-19 infection from riding transit
5. Transit ridership decline since the mid-2010s
6. Implementation of transit-priority improvements
7. Lower-income displacement
8. Decreased fare-revenue
9. Increasing numbers of people experiencing homelessness
10. Rethinking security
11. Driver shortage

TRENDS & POTENTIAL STRATEGIES

1. Decline of peak commute demand

- Spread service through the day
- Reallocate service

2. Transit ridership has declined more than other modes

- Focus on areas with strong transit demand now and likely into the future
- Strengthen transit access in equity areas

TRENDS & POTENTIAL STRATEGIES

3. Travel has declined less for less-educated and lower-income populations

- Focus on high demand areas
- Focus on equity areas

5. Transit ridership decline since the mid-2010s

- Focus on taking people to the places they need to go.
- Focus on areas with strong transit demand now and likely into the future.
- Work with policymakers to regulate ride hailing services that compete with transit.

TRENDS & POTENTIAL STRATEGIES

6. Implementation of transit-priority improvements

- Continue implementing transit-priority improvements, such as with the Rose Lane program.

7. Lower-income displacement

- Focus on taking people to the places they need to go.
- Improve multimodal facilities that make it easier and safer to get to transit.
- Continue to integrate anti-displacement strategies with transit improvements.

TRENDS & POTENTIAL STRATEGIES

11. Driver shortage

- Increase driver compensation
- Refine scheduling
- Higher capacity vehicles
(articulated buses)



MARKET ANALYSIS

MARKET: IN-PERSON WORK

U.S. employed persons who usually work from home:

- 2019: **5.7%**
- 2020: **15.8%**

Oregon employed persons who usually work from home:

- 2019: **7.3%**
- 2020: **18.4%**

Oregon Office of Economic Analysis
<https://oregoneconomicanalysis.com/2021/12/16/just-how-much-is-working-from-home-on-the-rise/>

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U.S. employed persons who teleworked because of the coronavirus pandemic:

- 2019: N/A
- 2020: **23.7%**
- 2021: **11.1%**

(This includes people who teleworked at any point in the last 2 weeks, even if they do not usually work from home.)

US Bureau of Labor Statistics

<https://www.bls.gov/covid19/effects-of-covid-19-pandemic-and-response-on-the-employment-situation-news-release.htm>

MARKET: IN-PERSON WORK

Mapped in-person job locations based on national data from the Bureau of Labor Statistics.

Data sources:

Bureau of Labor and Statistics (<https://www.bls.gov/cps/effects-of-the-coronavirus-covid-19-pandemic.htm#data>)

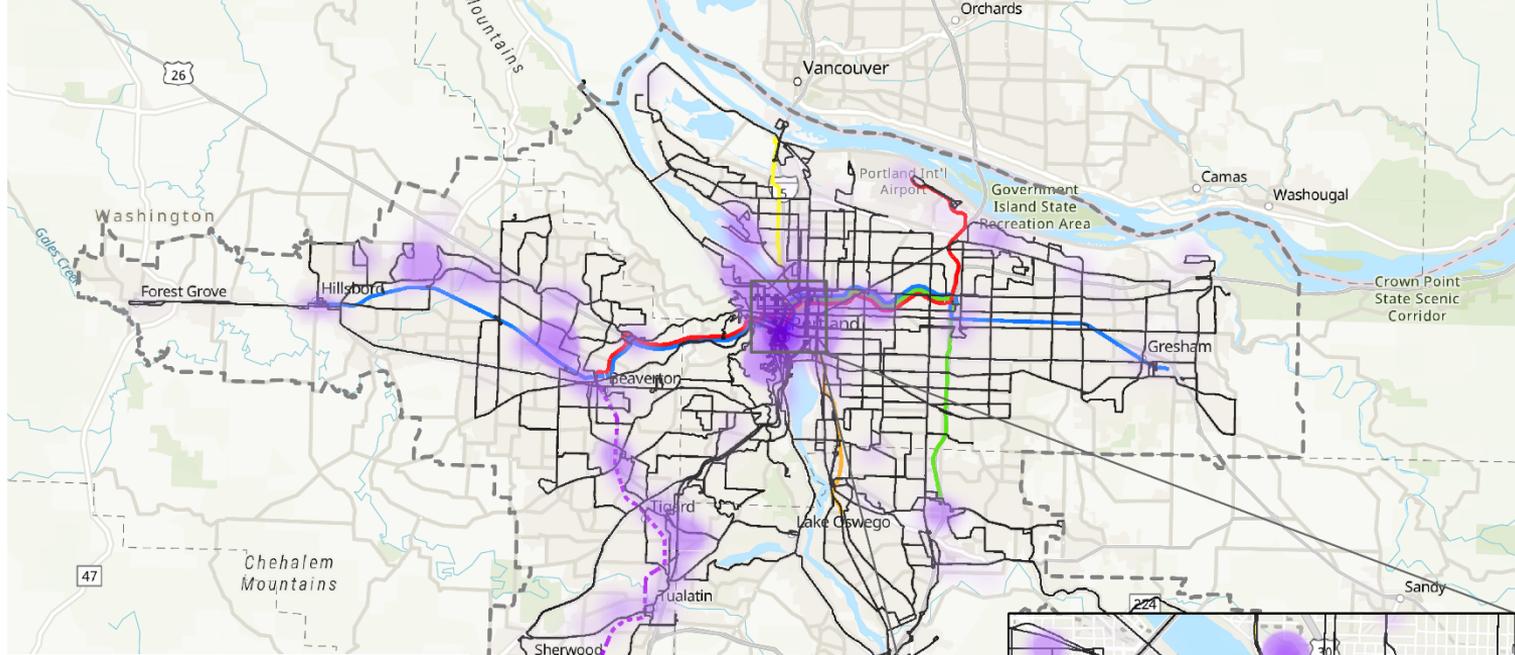
Oregon Employment Department (OED), Quarterly Census of Employment and Wages (QCEW) September 2021

Oregon Office of Economic Analysis as reported by the Oregonian (<https://www.oregonlive.com/business/2021/11/oregonians-march-back-to-the-office-has-nearly-halted.html>)



National Teleworking Rates by Industry

Agriculture and Related Industries	0.3%
Mining, Quarrying, and Oil and Gas Extraction	0.2%
Utilities	1.2%
Construction	2.2%
Durable Goods Manufacturing	7.0%
Nondurable Goods Manufacturing	3.5%
Wholesale Trade	1.7%
Retail Trade	4.4%
Transportation and Warehousing	2.2%
Information	4.6%
Finance and Insurance	13.6%
Real Estate and Rental and Leasing	2.2%
Professional and Technical Services	23.1%
Management	3.0%
Administrative and Support and Waste Management	3.0%
Educational Services	7.6%
Health Care and Social Assistance	
Hospitals	3.1%
Ambulatory Health Care Services, Nursing and Residential Care Facilities	4.3%
Social assistance	1.9%
Arts, entertainment, and recreation	1.6%
Accommodation and Food Services	1.2%
Other Services, Except Private Households	
Repair and Maintenance	2.9%
Personal and Laundry Services	2.9%
Religious, Grantmaking, Civic, Professional, and Similar	2.9%
Private Households	0.0%
Public Administration	7.8%
Miscellaneous (Uses Overall Oregon Rate from September 2021)	18.6%

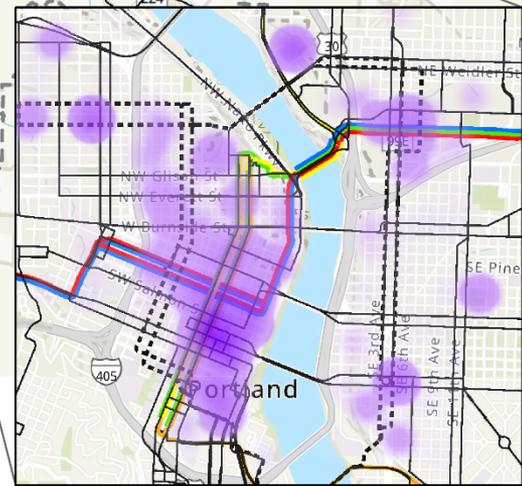


- TriMet Service Area
- Bus Route
- Street Car Route
- - - - WES Commuter Rail
- MAX Blue Line
- MAX Green Line
- MAX Orange Line
- MAX Red Line
- MAX Yellow Line

Estimated Number of In-Person Jobs

More

Fewer



Sources: Oregon Metro, TriMet, State of Oregon, ESRI, Jarrett Walker & Assoc., Parametric

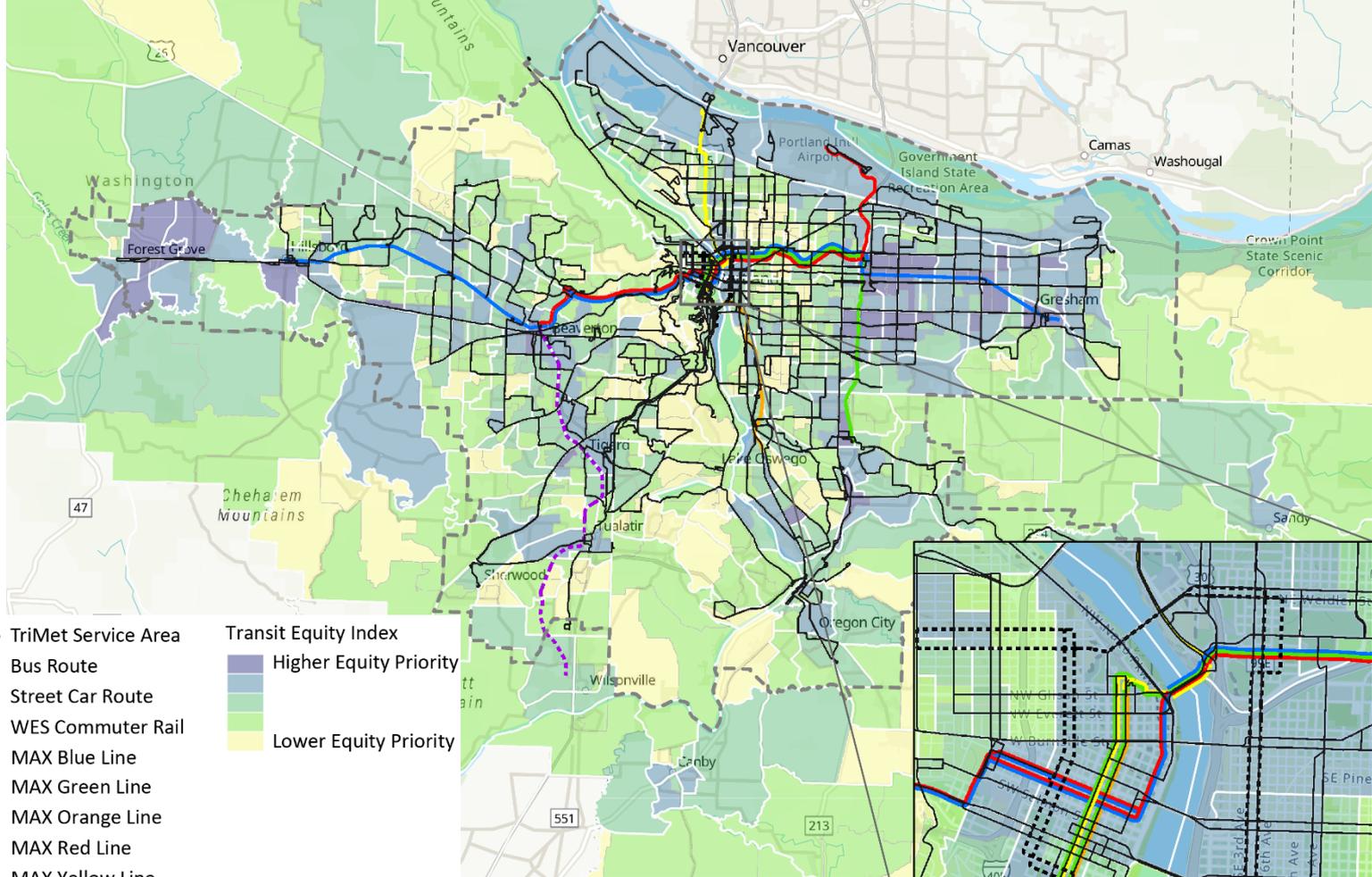


Estimated Distribution of In-Person Jobs

EQUITY INDEX

TriMet developed an Equity Index using 10 measures

1. Minority population
2. Low-income population
3. Limited English Proficiency (LEP) population
4. Senior population
5. Youth population
6. People with disabilities
7. Limited vehicle access households
8. Low and medium wage jobs
9. Affordable housing units
10. Key retail/human/social service



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- | | |
|----------------------|------------------------|
| Transit Equity Index | |
| | Higher Equity Priority |
| | Medium Equity Priority |
| | Lower Equity Priority |

Equity Index by Census Tract

Sources: Oregon Metro, TriMet, State of Oregon, ESRI, Jarrett Walker & Assoc., Parametrix



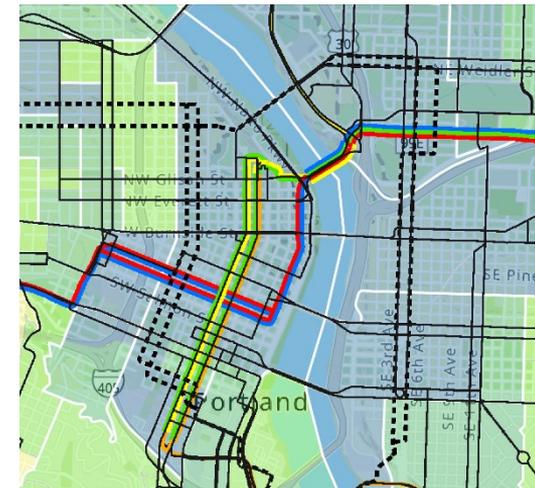
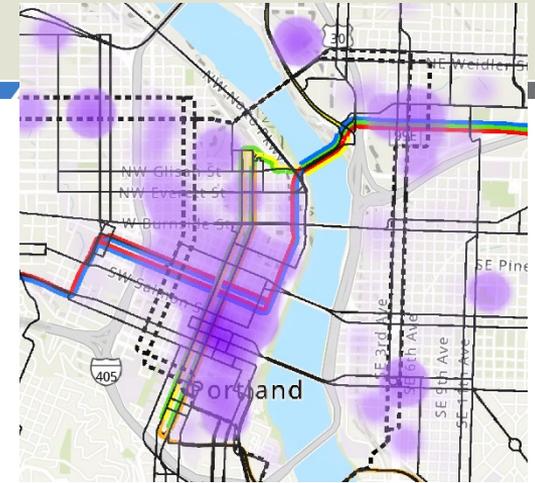
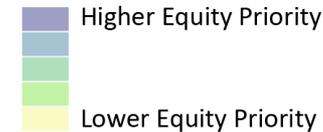
MARKET ANALYSIS

Downtown Portland is still an important destination for both in-person employment and equity priorities.

Estimated Number of In-Person Jobs



Transit Equity Index



Timeline

2022

January

February

March

April

May

June

July

August

September

October

Existing Conditions & Market Analysis



Phase 1 Outreach on Values



Alternatives Development and Analysis

Phase 2 Outreach on Alternatives

Future Service Recommendation




Board Update



FORWARD

TOGETHER

THANK YOU FOR YOUR TIME!

Grant O'Connell