



2017 On-board Survey Results

September 2017

EXECUTIVE SUMMARY

TEN TAKEAWAYS FROM THE COLUMBIA GORGE EXPRESS ON-BOARD SURVEY

1. **99% of respondents would recommend the Columbia Gorge Express (CGE) to others.** Across all characteristics listed, the service was rated ‘Excellent’ or ‘Good’ by at least 82% of respondents.
 2. A **U.S. state besides Oregon** was where the majority of survey-takers resided.
3. Most respondents boarding at Gateway learned about the CGE via a **transit trip planner or web search**. Most of those boarding at Rooster Rock learned about the service from a **sign on I-84**.
 4. 65% of riders boarding at Gateway Transit Center took **TriMet bus or MAX** to Gateway. Another 21% took a taxi, Uber, or Lyft.
5. Just over half (51%) of Gateway riders said they did **not have access to a car**.
 6. 9 out of 10 survey-takers were **riding the CGE for the first time**.
7. One-third of riders boarding at Gateway began their trip at a **hotel or Airbnb/VRBO/etc. in downtown Portland**. 20% came from their home in Portland outside downtown, and another 20% from an Airbnb/VRBO/etc. in Portland outside downtown. Rooster Rock riders largely began their trips in a **city besides Portland**, either their home or a hotel.
 8. 93% would consider taking the CGE to **other destinations in the Gorge** if service were expanded. As in 2016, Hood River remains the top suggested destination.
9. More Rooster Rock riders were aware of the **option to ride from Gateway** this year compared to last, and 90% said they would consider riding from Gateway for future trips to the Gorge.
 10. The top suggestion for improvement: **more service** (frequency, days/seasons, and hours of the day).

INTRODUCTION

The second season of the Columbia Gorge Express pilot operated from May 26 to September 4, 2017. In order to gauge the success of the service from the customer perspective and identify areas for potential improvement, ODOT conducted a survey of Columbia Gorge Express riders.

METHODOLOGY & RESPONSE RATE

Columbia Gorge Express staff handed out paper survey questionnaires to all riders at Gateway Transit Center and Rooster Rock State Park stops August 25-27 and September 1-2¹ (survey instruments attached). Completed surveys were given to drivers or visitor services staff. A different version of the survey was used for each stop due to differences including ticket requirements and stop access options.

A total of 311 surveys were completed – 232 by riders boarding at Gateway Transit Center and 79 by riders boarding at Rooster Rock. These figures equate to an overall response rate of 27%, with a 39% response rate for Gateway riders and a 14% response rate for Rooster Rock riders.

HOME RESIDENCE

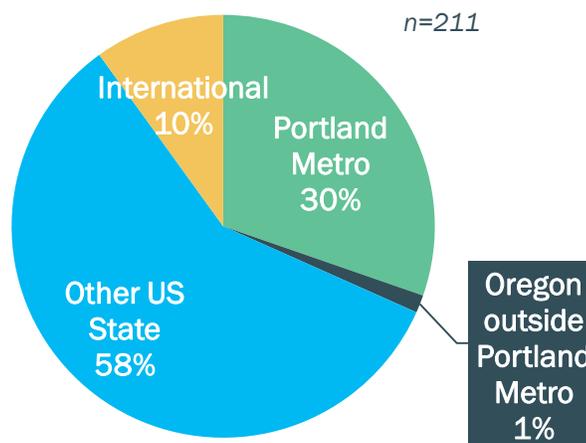
Riders were asked for their ZIP Code or city and country of home residence. Results were grouped and tallied as displayed in the pie charts that follow for riders boarding at Gateway and Rooster Rock, respectively. **The majority of riders at both stops were from a U.S. state besides Oregon**, followed by Portland Metro residents. International visitors comprised 10% of Gateway and 4% of Rooster Rock riders.

Comparison to last year

In 2016, a greater share of Gateway riders lived in the Portland Metro (48%) and a smaller share from other states (44%) and international locations (5%).

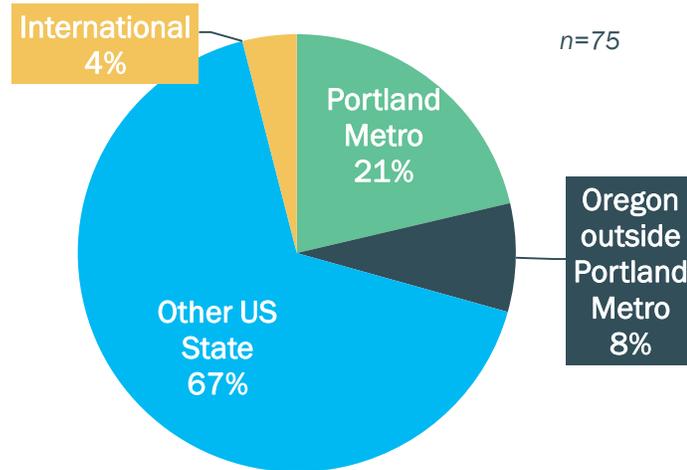
Results for Rooster Rock riders were similar across all areas compared to 2016.

Home residence of Gateway riders



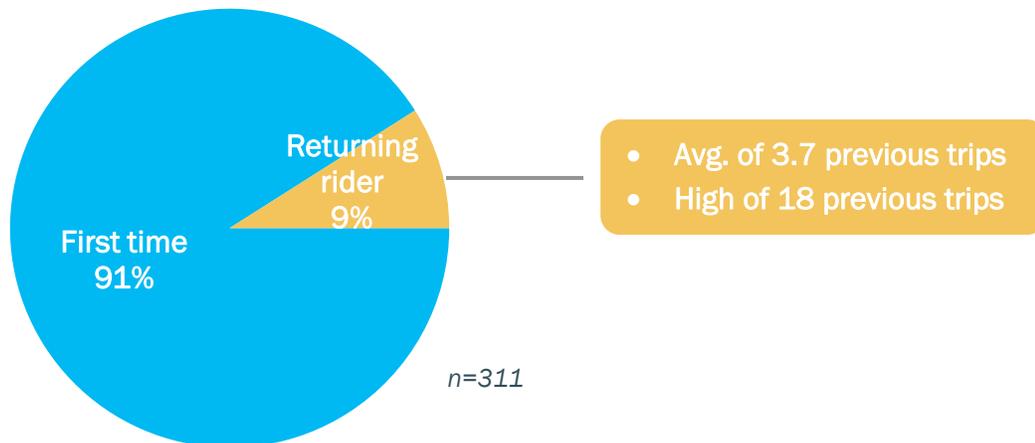
¹ September 3-4 were intended survey dates, but fire in the Gorge disrupted service and altered this plan.

Home residence of Rooster Rock riders



FIRST TIME & RETURNING RIDERS

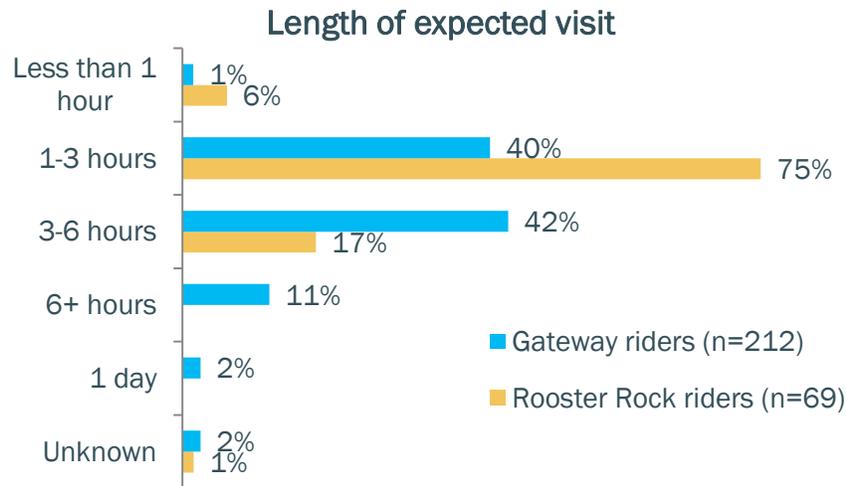
Ninety-one percent of respondents indicated it was their first time riding the Columbia Gorge Express. Of the 9% who had taken the bus before, the average number of previous trips was 3.7, with a high of 18 trips taken by one rider.



PARTY SIZE & LENGTH OF VISIT

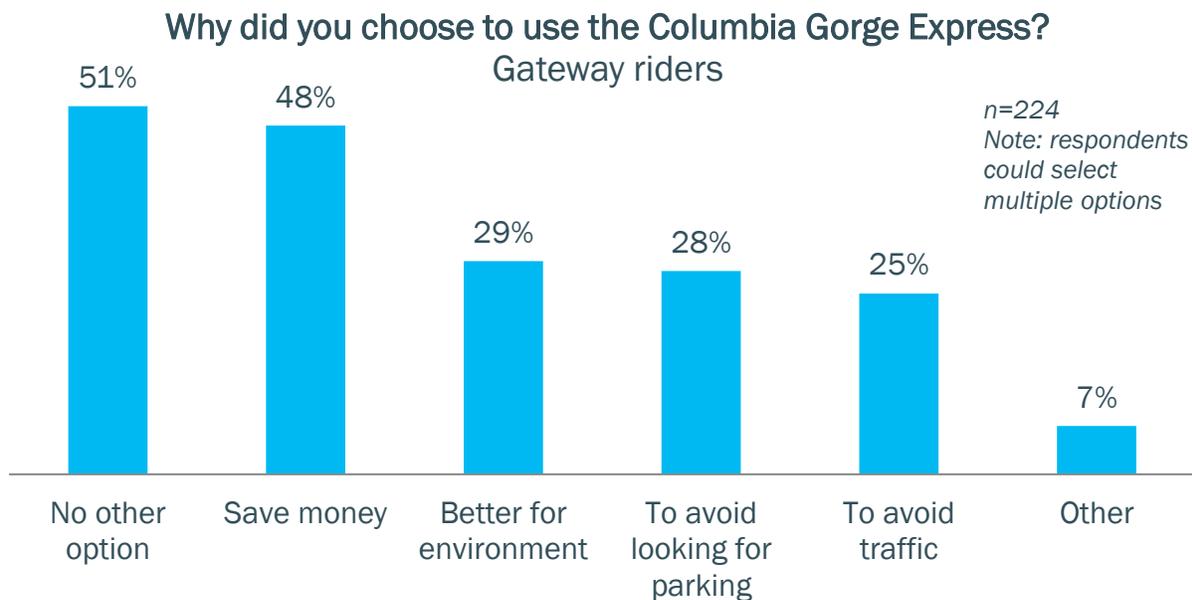
Overall, the average group size riding the Columbia Gorge Express was about 3. Gateway riders were close to evenly split between planning on spending 1-3 and 3-6 hours at their destinations (40% and 42% of respondents, respectively). Another 11% expected to spend over 6 hours in the Gorge. Gateway riders' overall average length of expected visit was 3 hours 20 mins.

Three-quarters of Rooster Rock riders expected to spend between 1 and 3 hours at Multnomah Falls, 17% between 3 and 6 hours, and 6% less than 1 hour. The overall average length of expected visit was about 1 hour 48 mins for Rooster Rock riders.

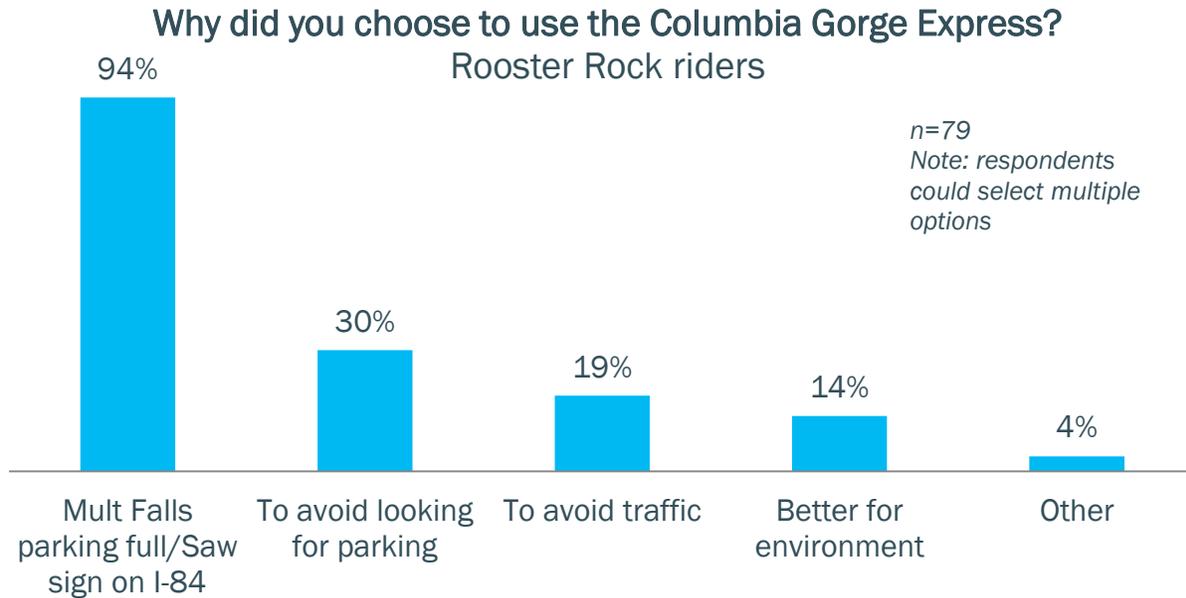


WHY THE COLUMBIA GORGE EXPRESS?

As expected, reasons for why riders chose to use the Columbia Gorge Express differed by boarding location. **Just over half of Gateway riders (51%) indicated that they did not have access to a car**, while just under half (48%) said they rode to save money.



On the other hand, the vast majority of Rooster Rock riders (94%) said they chose to ride the Columbia Gorge Express because the Multnomah Falls parking lot was full and/or they saw a sign for the shuttle on I-84. Thirty percent selected “To avoid looking for parking” as a reason for riding.



Comparison to last year

Results are largely similar to 2016 in terms of reasons for choosing the CGE. One exception to this is that in 2016 38% of Gateway riders selected “To avoid looking for parking” as a reason for riding the CGE, higher than the 28% who said so this year.

LEARNING ABOUT THE COLUMBIA GORGE EXPRESS

Riders boarding at Gateway largely said that they learned about the bus service online (either transit trip planner, web search, or social media); from family or friends; or in a news story. While some Rooster Rock riders learned about the Columbia Gorge Express online, most did by seeing the sign on I-84 or from family or friends.

How did you learn about the Columbia Gorge Express?

Gateway Riders (n=224)		Rooster Rock Riders (n=78)	
Transit trip planner (e.g., Google Maps)	36%	Saw sign on I-84	58%
Family/friend	25%	Family/friend	18%
Web search	18%	Transit trip planner (e.g., Google Maps)	8%
News story	8%	Hotel staff	6%
Saw bus or stop	7%	Saw bus or stop	5%
Social media	6%	Information kiosk	3%
Information kiosk	4%	Print advertisement	1%
Print advertisement	3%	Social media	1%
Hotel staff	2%	Other	4%
Other	4%		

Comparison to last year

The major differences between 2016 and 2017 were a greater portion of Gateway riders learning about the CGE through a transit trip planner like Google Maps in 2017 (36% vs. 23% in 2016), and a smaller portion discovering the service through an ordinary web search (18% vs. 30% in 2016).

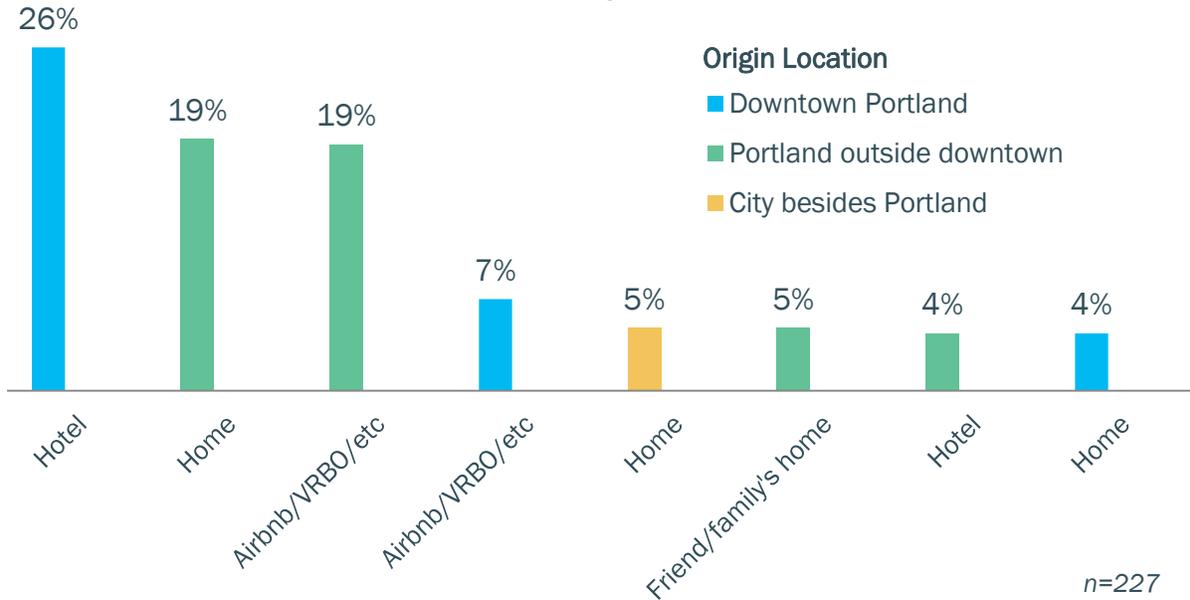
For Rooster Rock riders, the major difference in 2017 was that a smaller portion learned about the service from a sign on I-84 (58% vs. 76% in 2016).

ORIGIN & DESTINATION

The survey asked riders about the type of place their trip began (i.e. home, hotel, etc.) as well as where that was located geographically. **Just over a quarter of Gateway riders started their trips at a hotel in downtown Portland**, followed by home in a Portland neighborhood besides downtown (19%) or an Airbnb/VRBO/etc. also in Portland outside downtown (19%). Overall, about 80% of Gateway respondents' trips originated in Portland and 20% began elsewhere.

Nearly three-quarters (74%) of Gateway riders selected Multnomah Falls as their sole destination, with 16% selecting both Rooster Rock and Multnomah Falls, and 8% only Rooster Rock.

Top trip origin types and locations Gateway riders



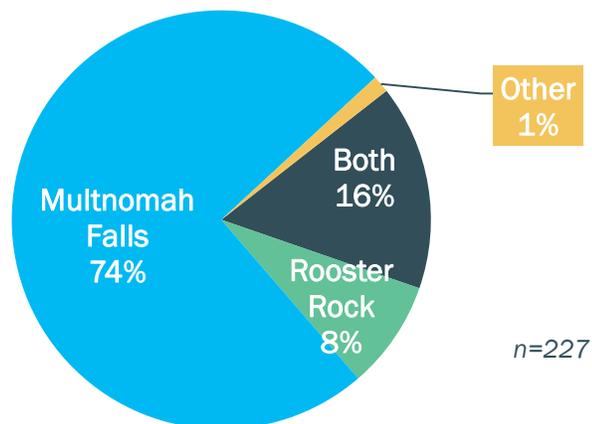
Comparison to last year

This year saw a greater share of Gateway riders traveling from hotels or Airbnbs/VRBOs/etc. compared to 2016 (66% vs. 41%, respectively), and a smaller share from home (31% vs. 48%, respectively). Destinations were similar.

Origin types were similar in 2017 and 2016 for Rooster Rock riders.

Note: origin location was not asked in 2016.

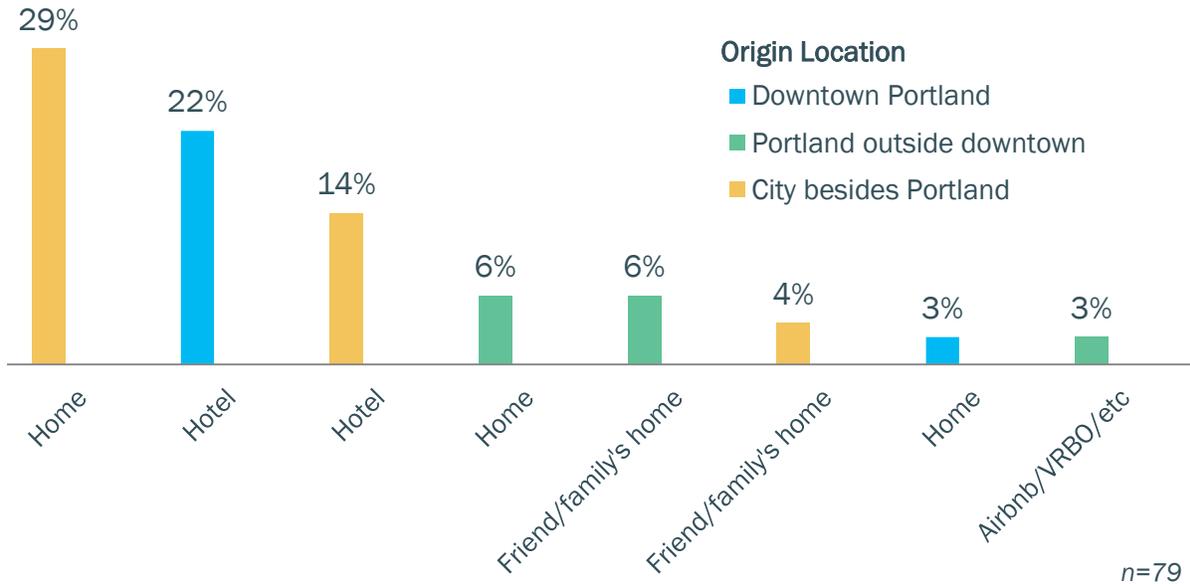
Destination for Gateway riders



Meanwhile, **29% of Rooster Rock riders began their trips at home in a city besides Portland.** Another 22% traveled from a hotel in downtown Portland, and 14% from a hotel in a city besides Portland. Rooster Rock respondents were split approximately in half overall in terms of originating in Portland vs. elsewhere.

It was assumed that Rooster Rock riders' destination was Multnomah Falls.

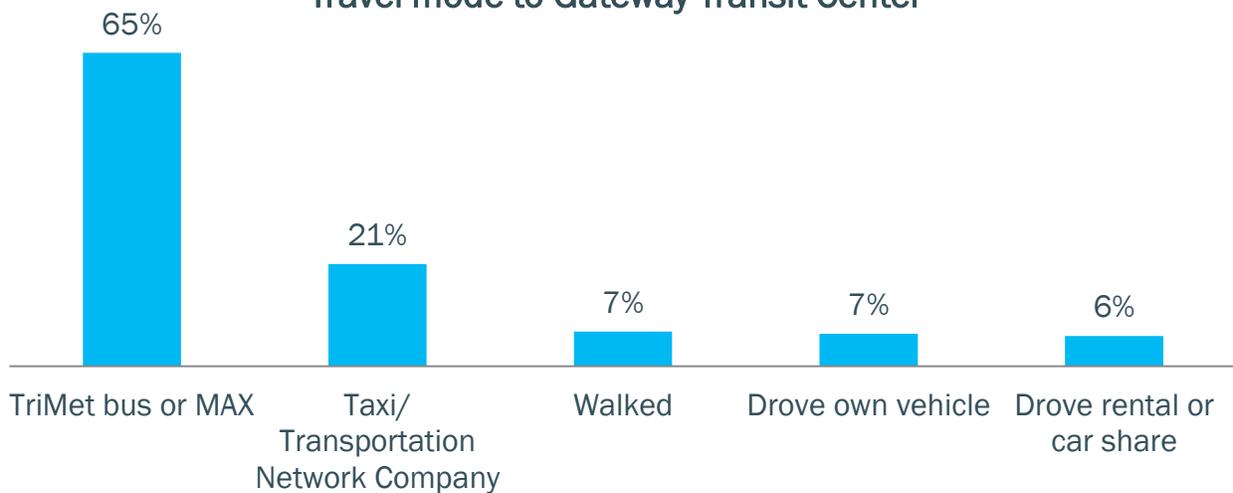
Top trip origin types and locations Rooster Rock riders



TRAVEL TO GATEWAY TRANSIT CENTER

A majority of riders boarding at Gateway (65%) traveled to the transit center on TriMet bus or MAX light rail. Another 21% took a taxi or Transportation Network Company like Uber or Lyft. **Just 13% drove a car**, about half of whom took their own vehicle while the other half drove a rental or car share vehicle.

Travel mode to Gateway Transit Center



n=223

Note: respondents could select more than one option

Rooster Rock riders were asked whether they knew they could take the Columbia Gorge Express from Gateway Transit Center for \$5 roundtrip, and whether they would consider doing so for future trips to Multnomah Falls. About 30% were aware of this option, and nearly 9 out of 10 riders said they would consider riding from Gateway in the future.

Comparison to last year

At 65%, use of public transit to travel to Gateway Transit Center was down somewhat this year compared to 2016, when 75% accessed Gateway via bus or MAX. More respondents also bicycled to Gateway in 2016, comprising 3% of riders compared to less than 1% this year.

Other results for Gateway riders are similar between the two years.

A greater share (30%) of Rooster Rock riders were aware of the Gateway option this year than the 13% that did in 2016. The share who said they would consider riding from Gateway in the future was similar between the two years.

CUSTOMER SATISFACTION

Riders rated the performance of the Columbia Gorge Express on several attributes, from vehicle condition to service levels. Over 80% of riders gave 'Excellent' ratings to *Driver courtesy, Ease of fare payment, Cleanliness/condition of vehicle, and Value for the price. All areas were rated as 'Good' or 'Excellent' by at least 82% of riders, with a high of 99% on Value for the price.*

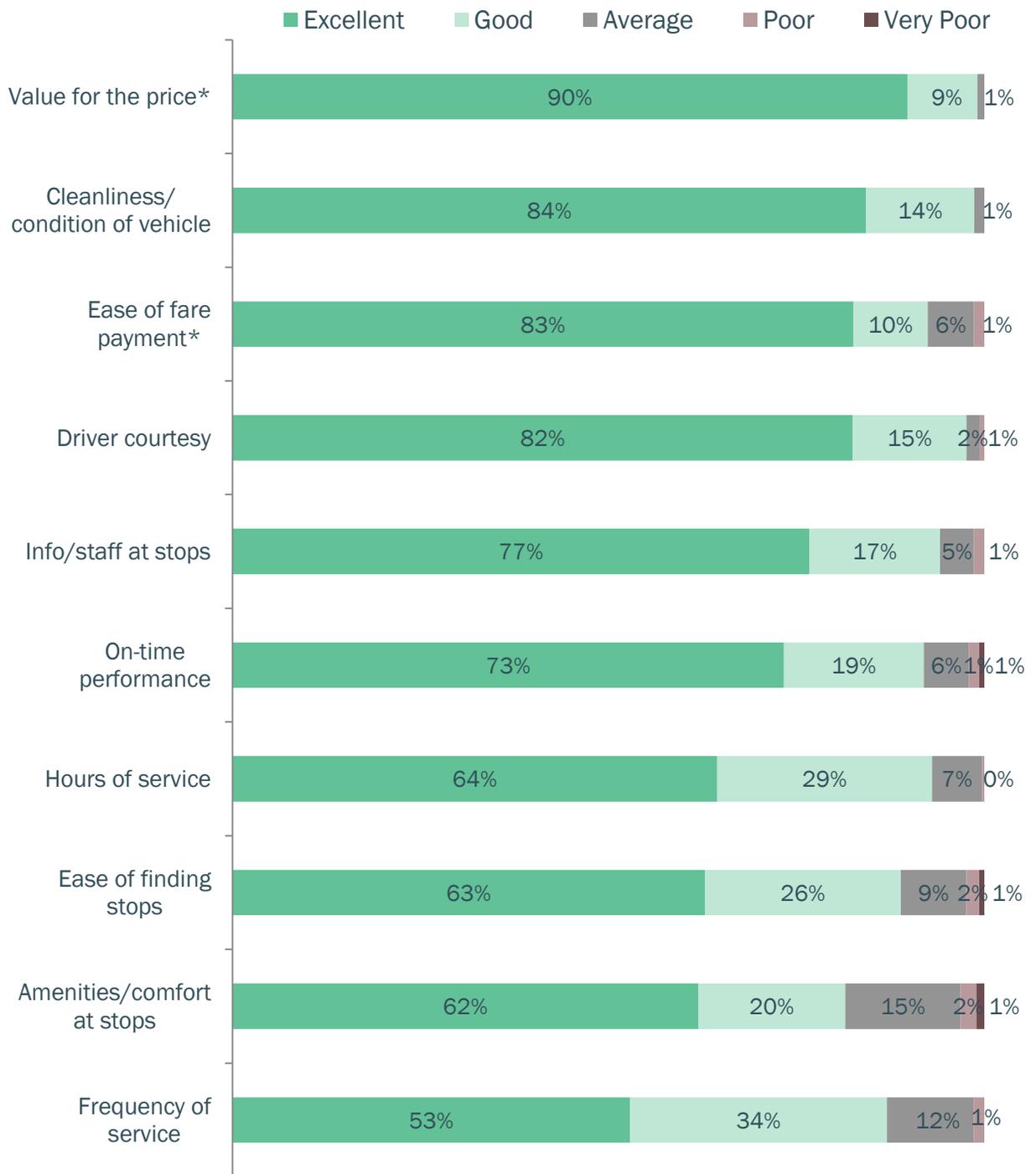
The lowest-rated attributes were *Amenities/comfort at stops, Frequency of service, and Ease of finding stops*, although riders were generally satisfied with these. This is consistent with multiple comments on the survey and in the field suggesting increased frequency, shade and seating at Multnomah Falls, and better signage at Gateway Transit Center directing riders to the bus stop.

Comparison to last year

The CGE also received high customer satisfaction ratings in 2016. Some notable differences include:

- Ease of finding stops was rated more highly in 2017*
- Ease of fare payment was rated more highly in 2017*
- Driver courtesy was rated lower in 2017*
- Cleanliness/condition of vehicle was rated lower in 2017*

Customer Satisfaction Ratings



*=Gateway riders only

SUGGESTED IMPROVEMENTS

The final question on the survey asked riders about the improvements they would like to see to the Columbia Gorge Express. Of those who provided suggestions, the most common were regarding increased service (days, hours, and/or frequency); better customer information and signage; and stop amenities such as shade and seating.

Improvement	No. of Mentions
Total: Increased service	32
Expanded days/seasons	13
Increased frequency	13
Expanded hours	6
Better information/signage	25
Stop amenities (e.g. seating, shade)	16
Ticketing improvements	7