

2025 CUSTOMER SATISFACTION, COMMUNITY VALUE, & EMPLOYEE ENGAGEMENT SURVEYS



Since 2011,
ETC Institute Has
Surveyed More
Than 3,500,000
People for More
Than 1,200
government
agencies on 4
continents!

ETC Institute is the Leader in Market
Research for State and Local Governments.
Clients include 29 of the 35 largest public
transit systems in the United States



*For more than 35 years, our mission has
been to help local governments gather and
use survey data to make better decisions.*

5 THINGS TO REMEMBER



- 1. Most residents of the Salem area think Cherriots provides value to the Community:** 97% of LIFT Customers, 91% of Bus Customers, and 76% of community members surveyed.
- 2. Cherriots is setting the standard for service delivery**
 - Cherriots' customer satisfaction ratings are above the National Average in nearly all areas and have mostly improved from last year's great results.
3. The majority of Cherriots' customers would like funding for Cherriots to increase over the next five years.
4. Residents feel that Cherriots can take them to all of the important places they need to go, and most have a desire for increased funding.
5. Employee Satisfaction increased in most areas, while there is still a hunger for continuing to increase Communication.



AGENDA

OVERVIEW OF SURVEYS

PART 1: CUSTOMER SATISFACTION SURVEY

- Methodology
- Characteristics of Riders
- Comparisons to National Averages/2024
- Opportunities for Improvement
- Net Promoter Score

PART 2: COMMUNITY VALUE SURVEY

PART 3: EMPLOYEE ENGAGEMENT SURVEY

SUMMARY

QUESTIONS

PART 1: CUSTOMER SATISFACTION SURVEY

METHODOLOGY

Bus Survey



- The survey was administered from September 6th to September 17th, 2025
- Surveys were conducted onboard buses, at Cherriots transit centers, and at bus stops
- The sample goal for the survey was 400 (320 Weekday, 80 Weekend), which is +/- 4.9% at the 95% confidence level
- Each route in the Cherriots system was sampled in proportion to their April 2025 average daily ridership

METHODOLOGY

LIFT Paratransit Survey



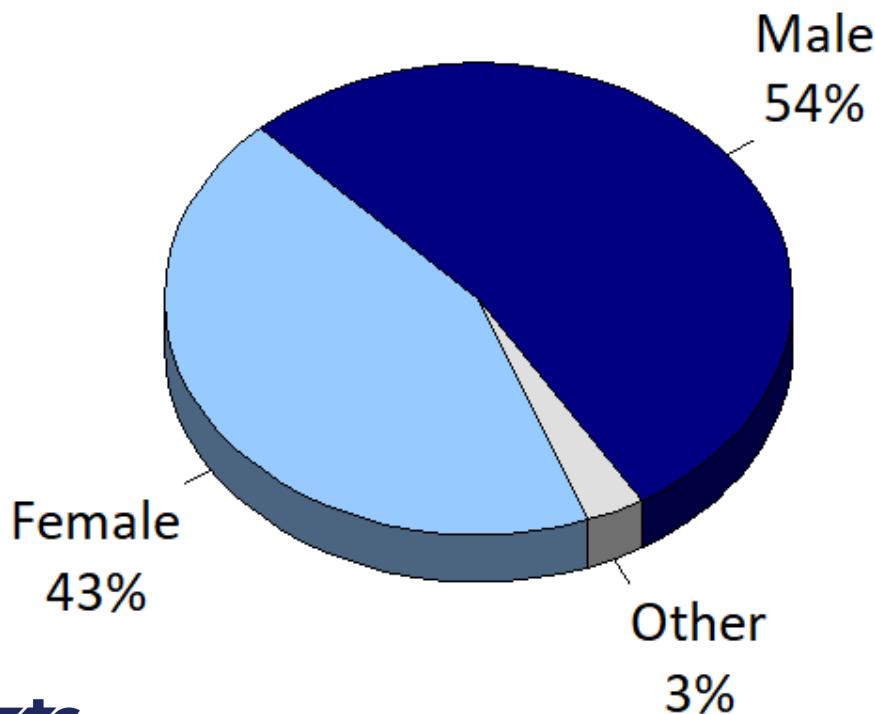
- Survey administration took place in September 2025
- ETC used a combination of mail, text messages, and emails
- Survey was conducted in both English and Spanish
- The sample goal for the survey was 200

MAJOR FINDING #1: CHERRIOTS RIDERSHIP IS DIVERSE

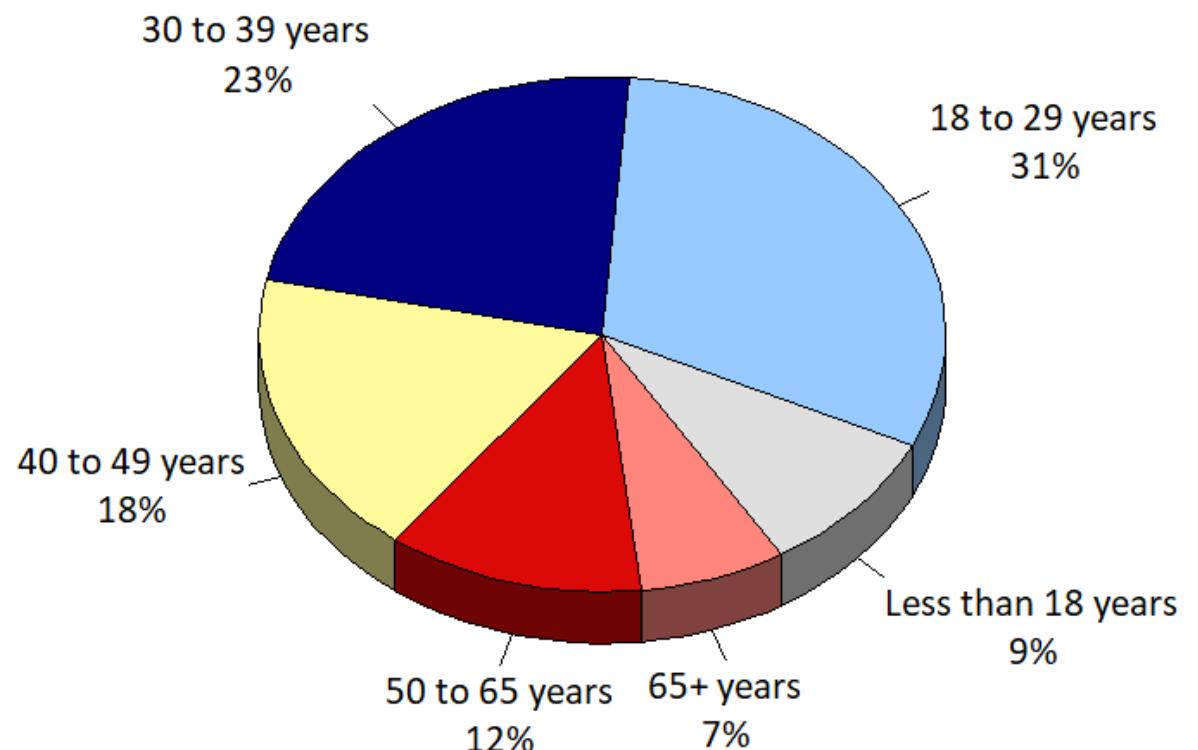
GENDER And AGE



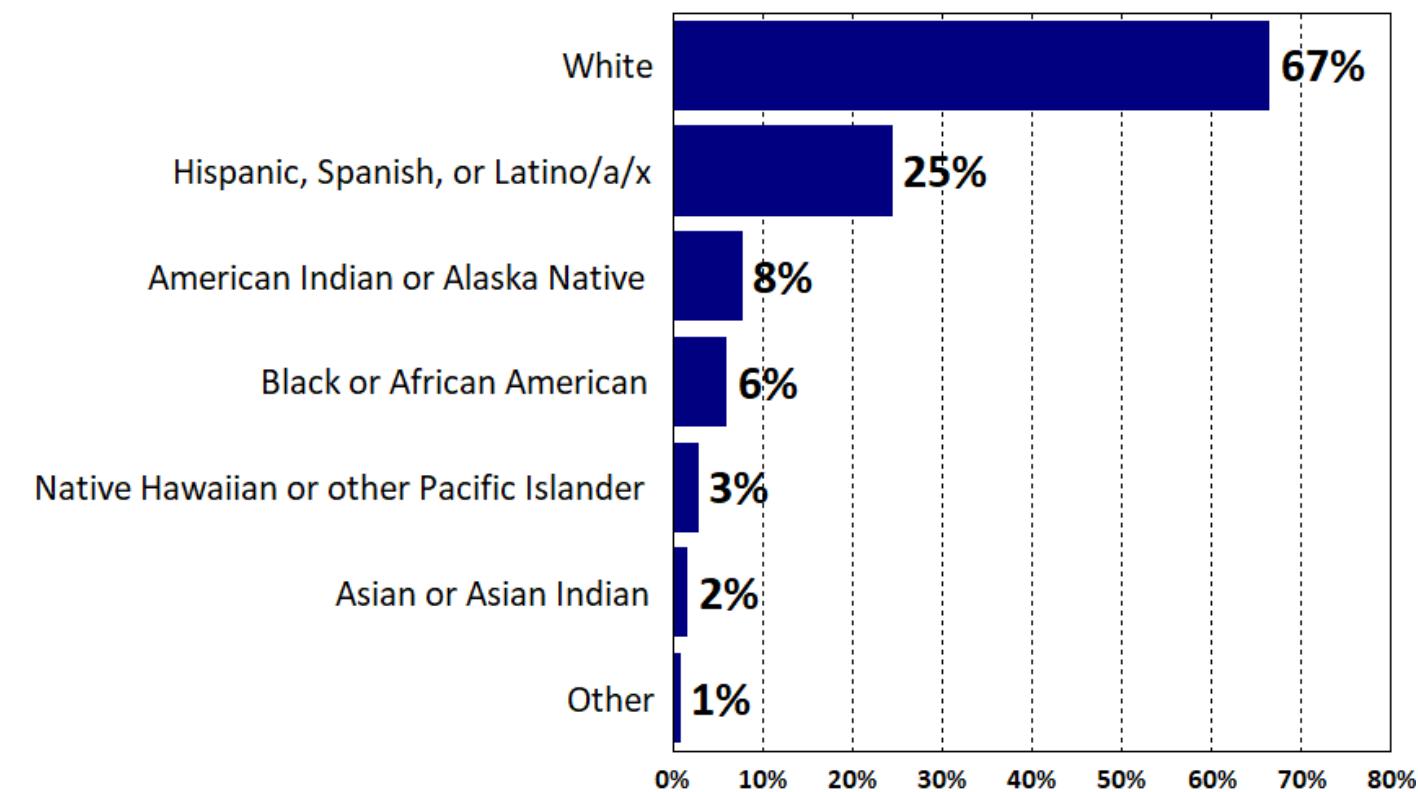
Gender: 54% of Bus customers were MALE



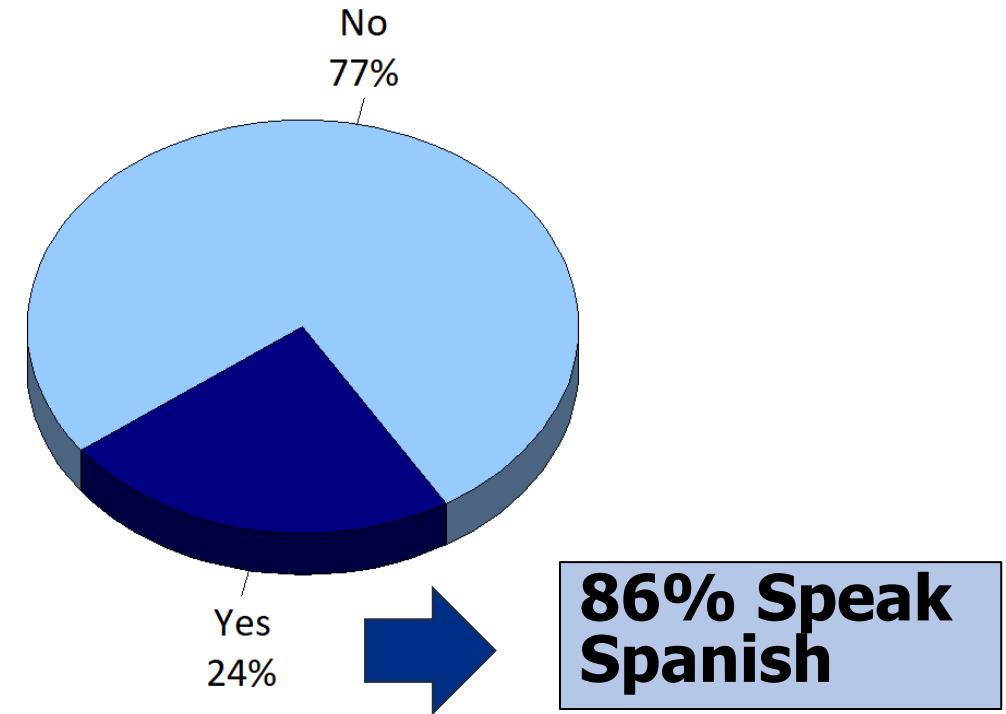
Age: 45% of Bus customers were UNDER AGE 30



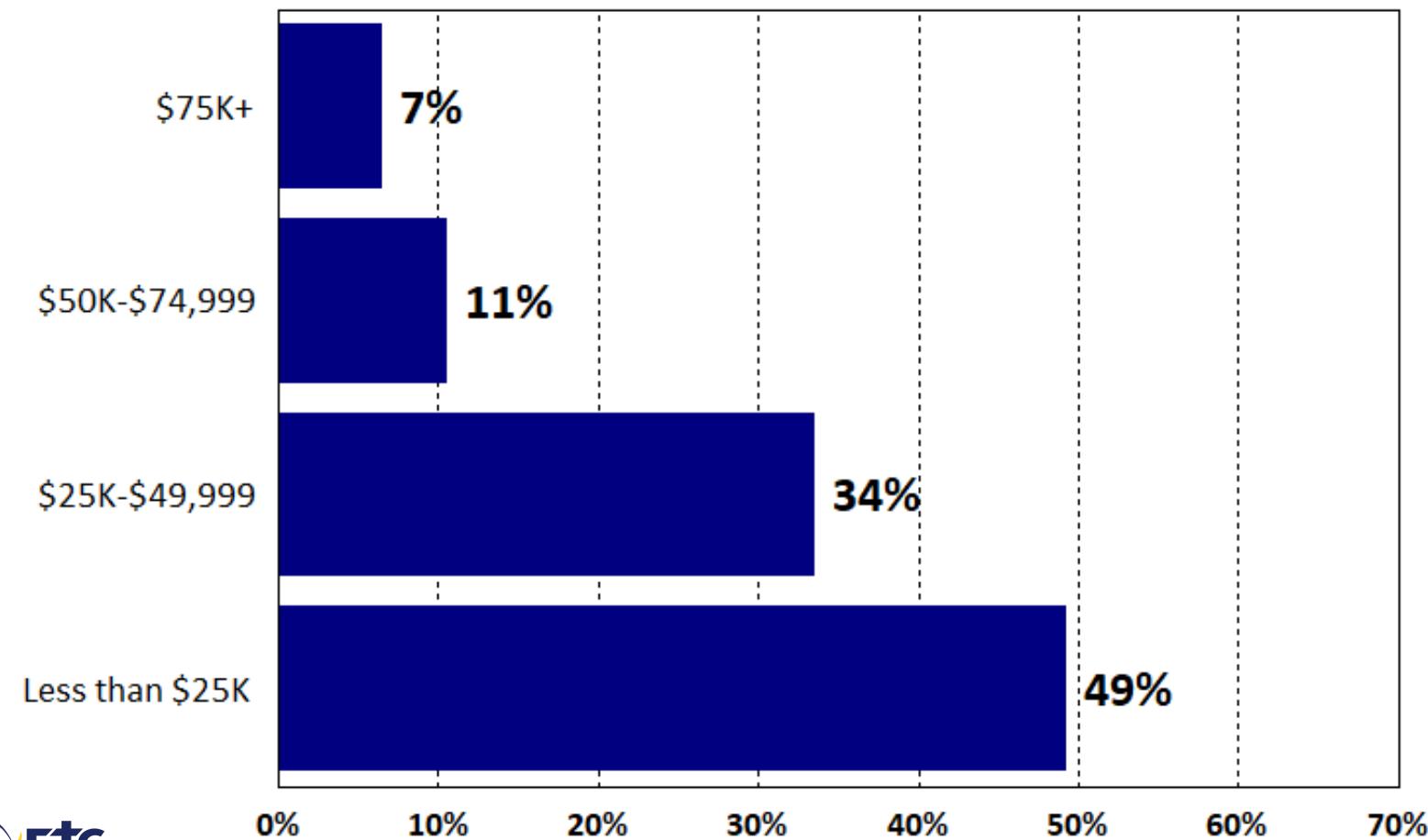
RACE / ETHNICITY & LANGUAGE: Cherriots Ridership is Diverse



Do you speak a language
other than English at home?



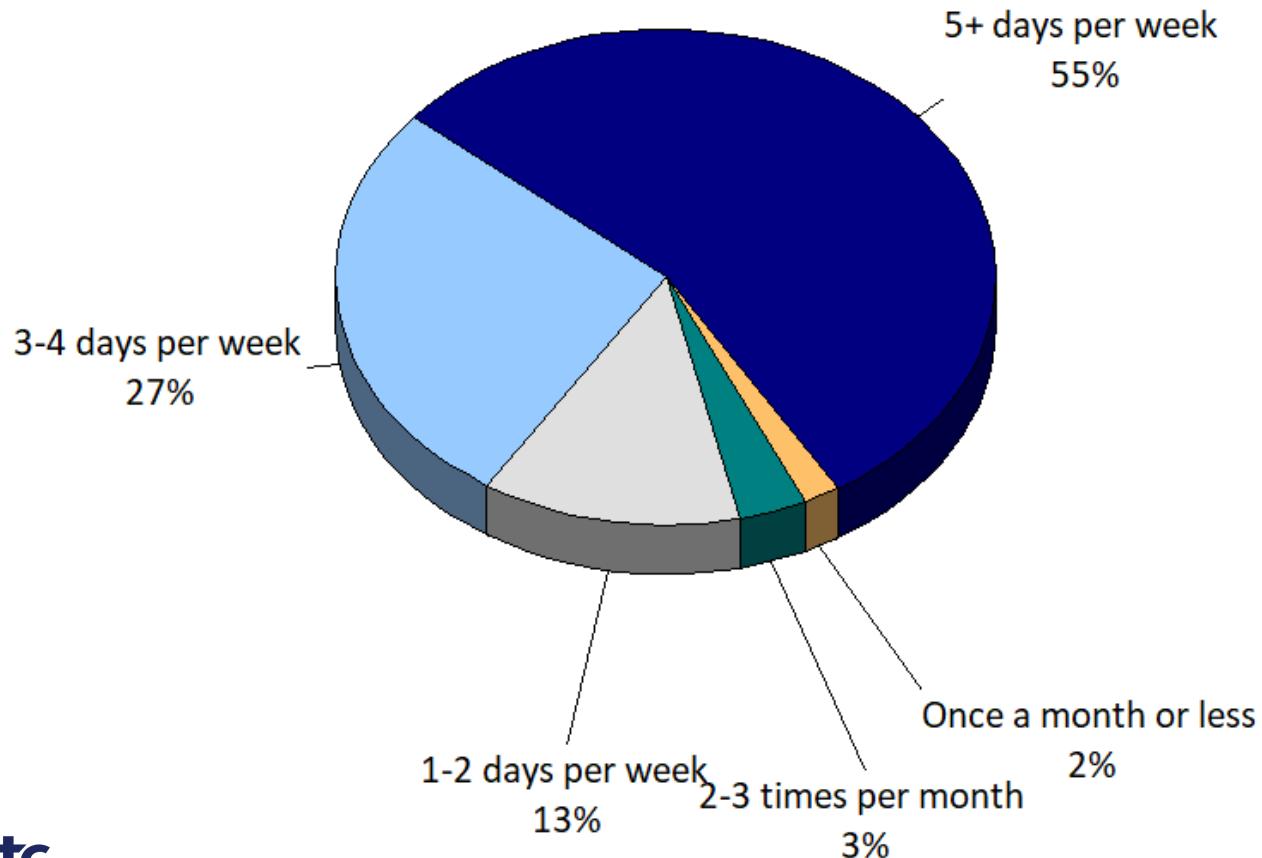
HOUSEHOLD INCOME



Cherriots helps many members of lower-income households travel in the Salem Region

FREQUENCY OF TRANSIT USE

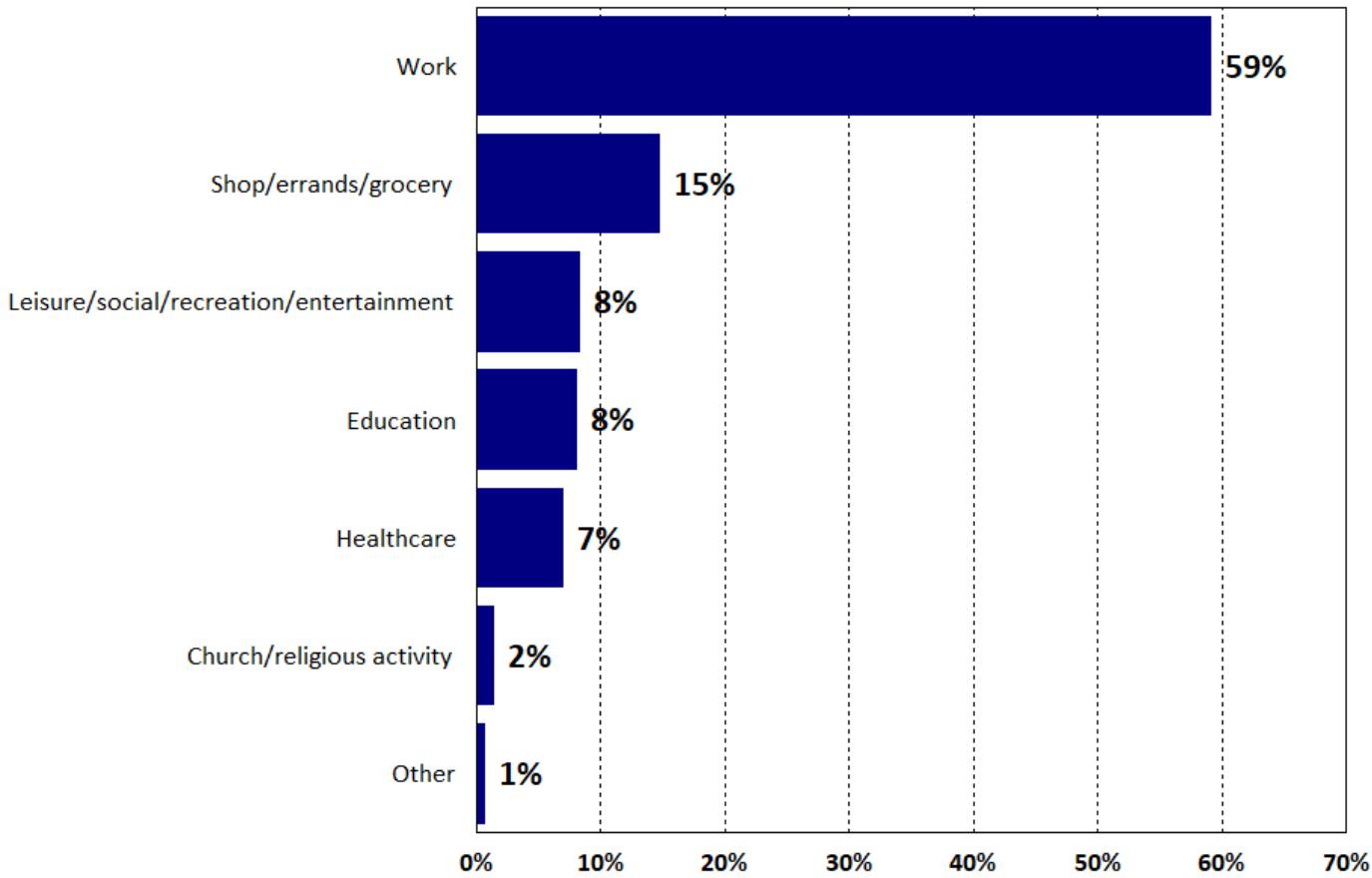
Most customers are using bus services several times per week



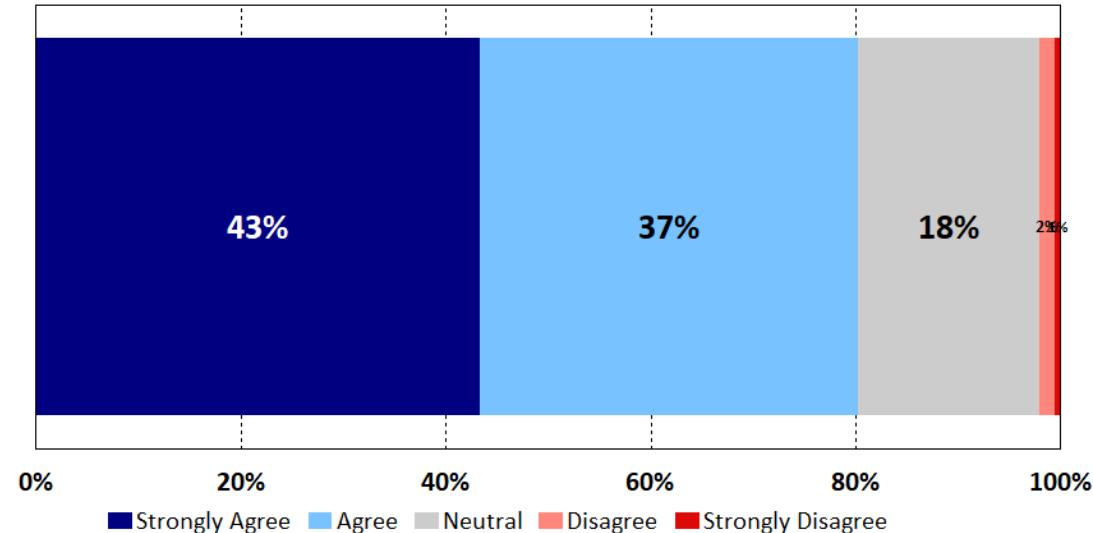
More than half of bus customers ride at least five days per week!

MAJOR FINDING #2: CHERRIOTS IS VERY IMPORTANT TO THE REGION'S ECONOMY

TRIP PURPOSE: Work Is the #1 Purpose for Bus Customers



The bus routes allow me to have better access to employment:



92% of riders are depending on Cherriots to get around!

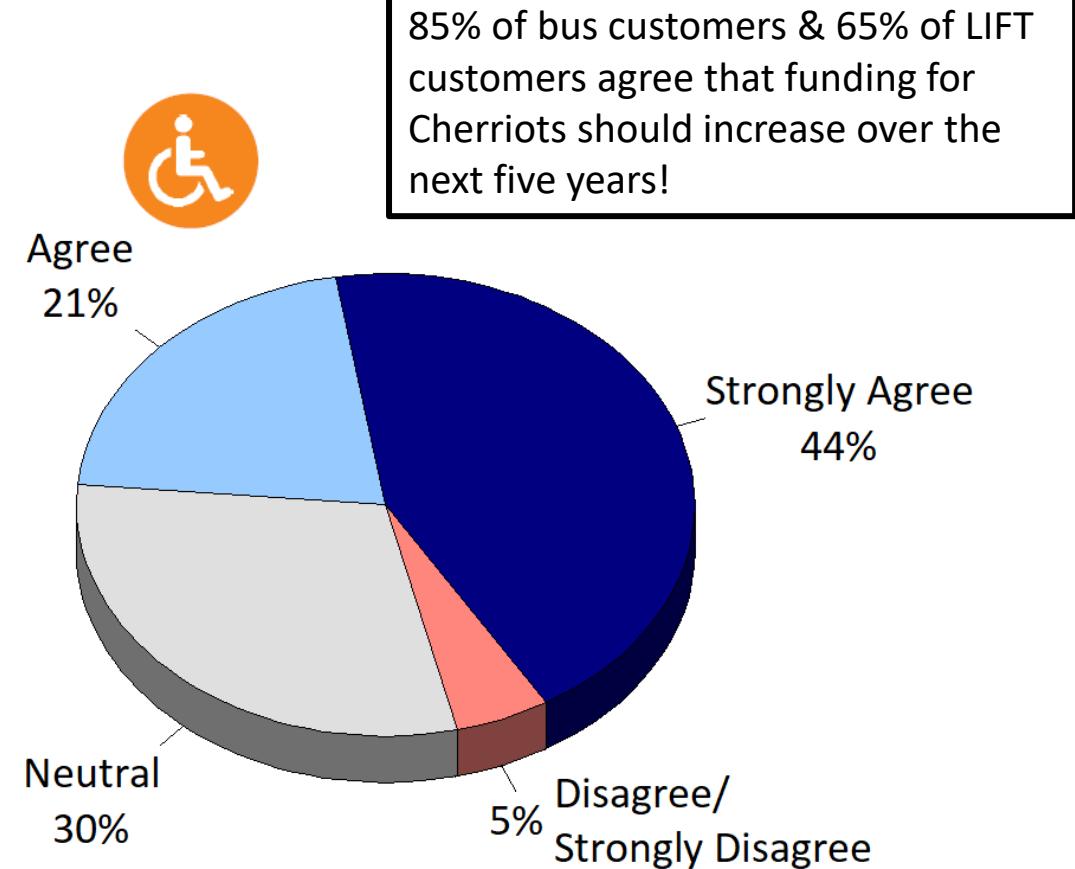
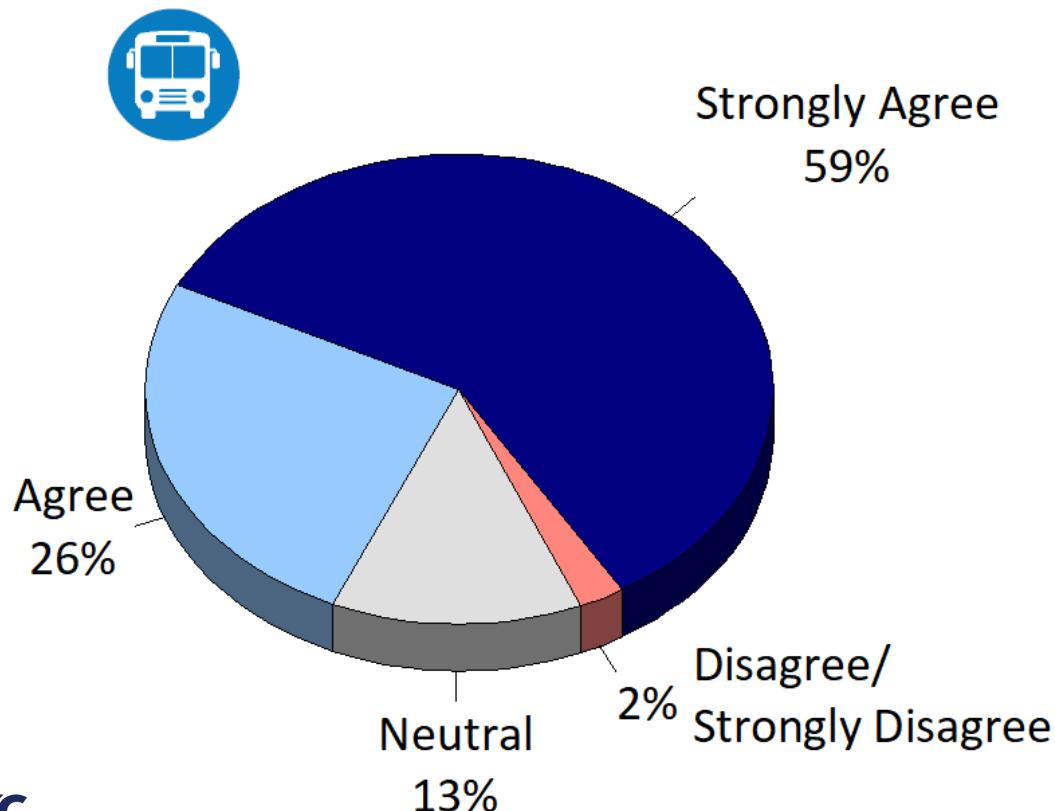
Without Cherriots many residents would not be able to get to work

**MAJOR FINDING #3:
MOST CUSTOMERS WOULD
LIKE TO SEE FUNDING FOR
CHERRIOTS INCREASE!**



FUNDING

Customers want funding for Cherriots to increase

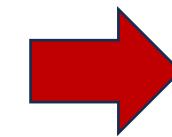
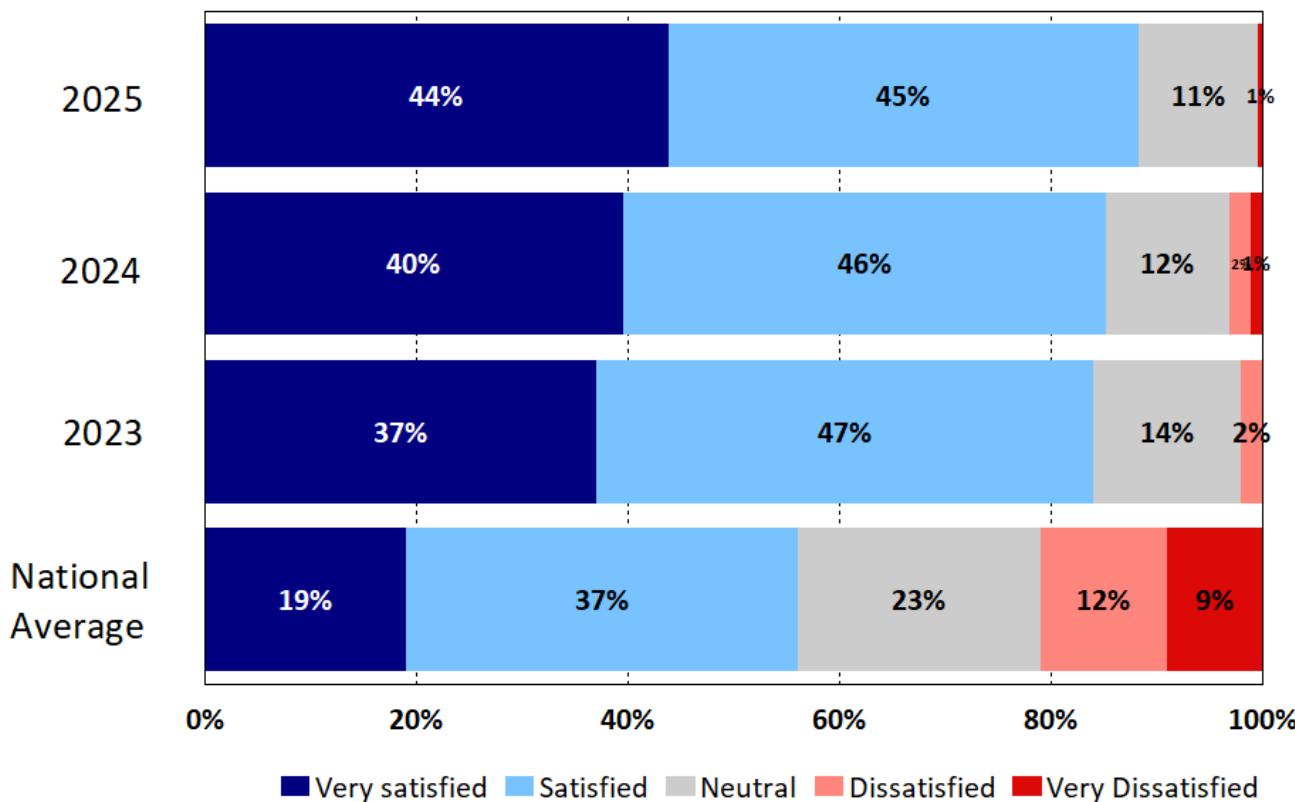


MAJOR FINDING #4: CHERRIOTS IS SETTING THE STANDARD IN MANY AREAS

OVERALL SATISFACTION FOR BUS SERVICE IS VERY POSITIVE



Cherriots Overall Satisfaction is **33%** higher than the National Average

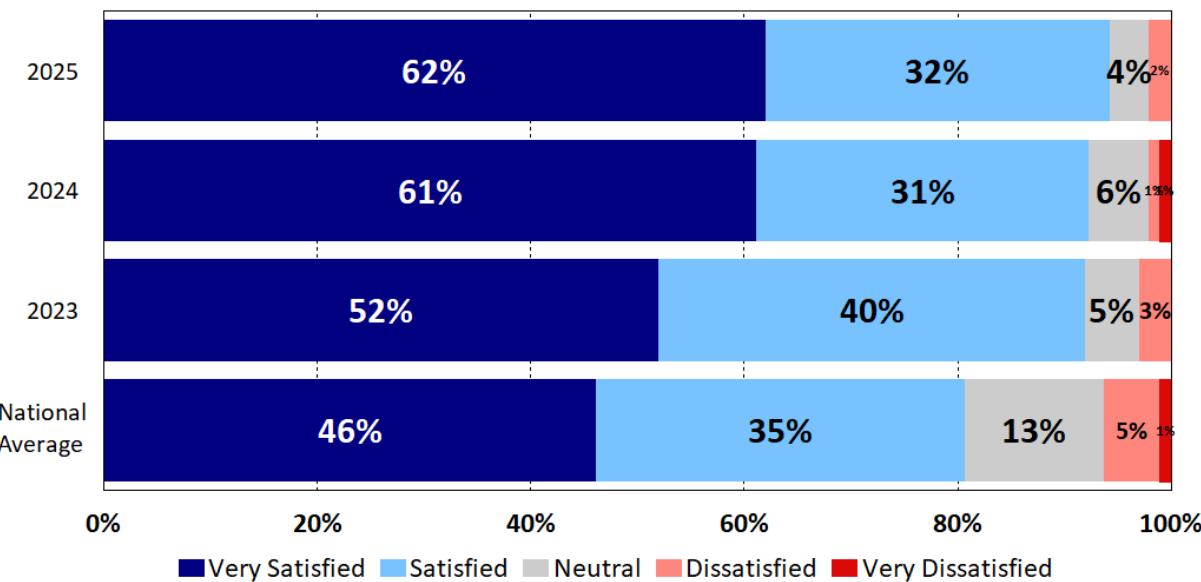


Out of 410 Respondents, Only 2 were dissatisfied!

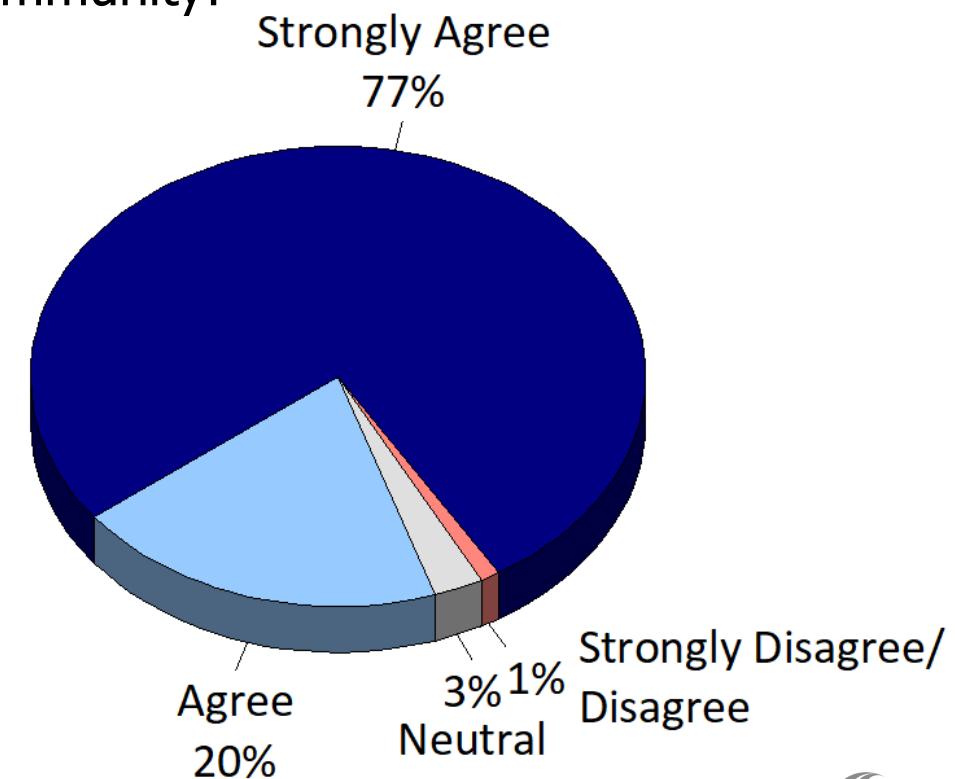
OVERALL SATISFACTION WITH LIFT SERVICES IS EVEN HIGHER!



94% of LIFT Customers are Satisfied vs. 2% Dissatisfied



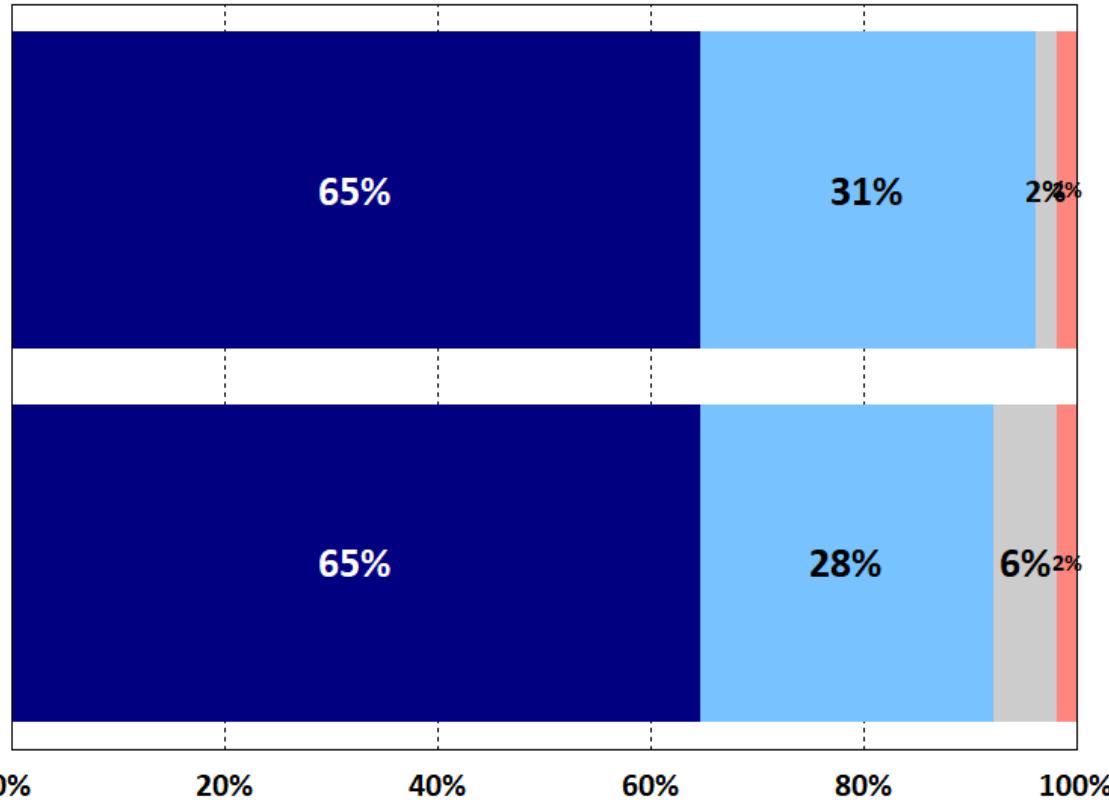
97% of LIFT Customers agree that Cherriots provides value to the community!





EXCELLENT CUSTOMER SERVICE

When contacting Cherriots' Customer Service, my concerns are addressed promptly



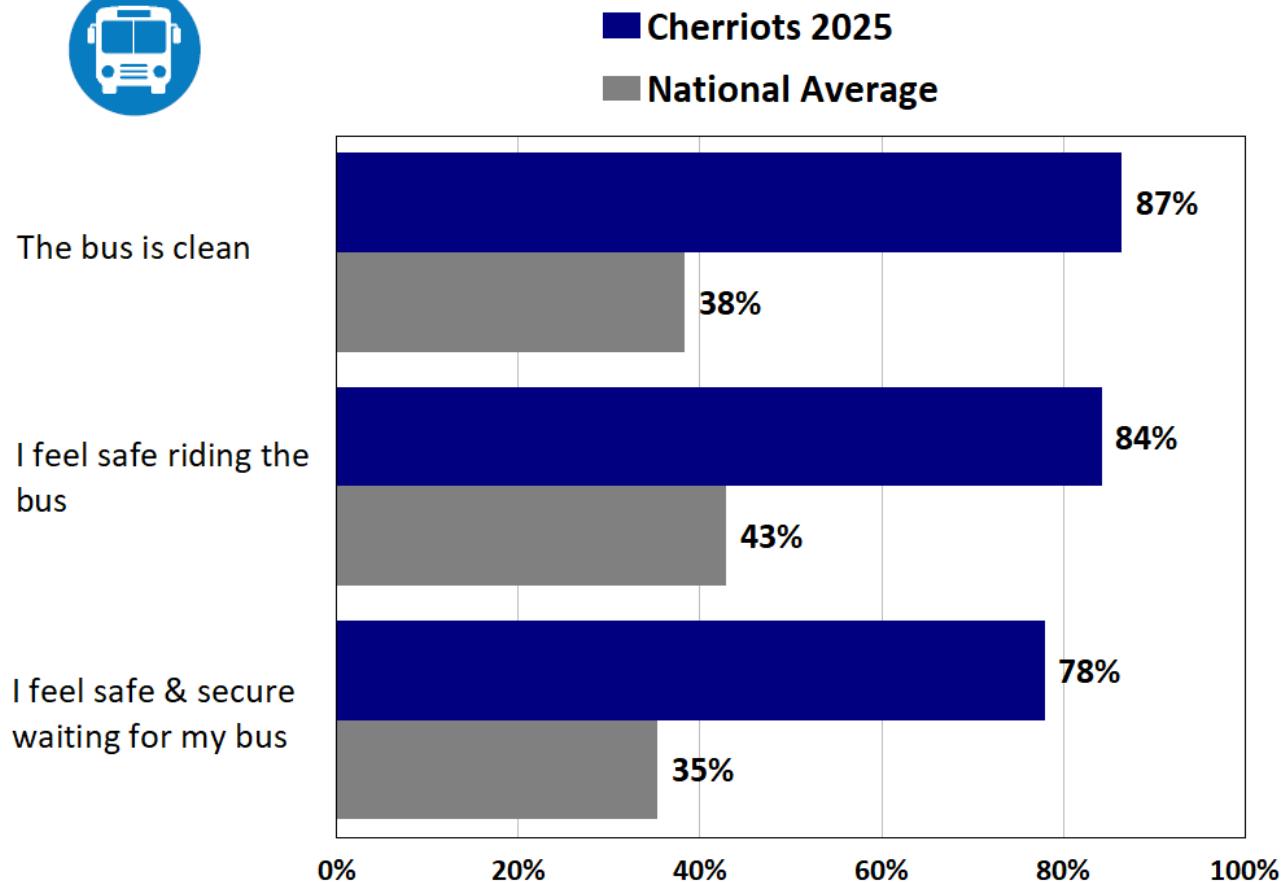
96%

Customer Service Representatives are helpful & courteous

93%

Strongly Agree Agree Neutral Disagree

BUS Services Rated ABOVE the National Average in ALL Areas Assessed



BUS ratings are well above the National Average for **Safety & Cleanliness**

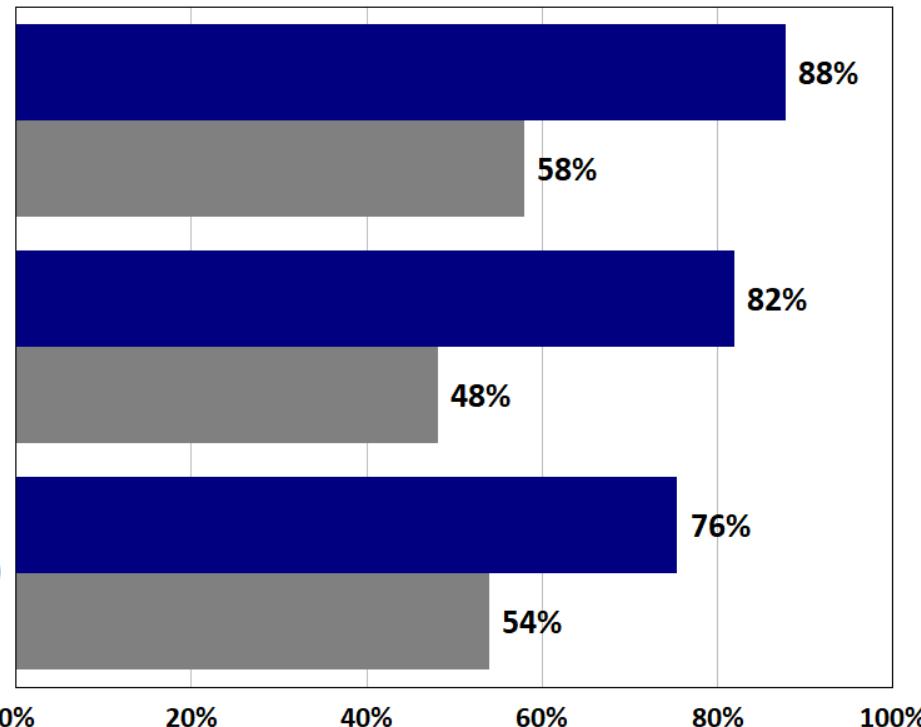
- Bus Cleanliness: **+49%**
- Safety While Riding: **+38%**
- Safety While Waiting: **+41%**

BUS Services Rated ABOVE the National Average in ALL Areas Assessed



■ Cherriots 2025
■ National Average

The bus gets me to my destination in a reasonable amount of time



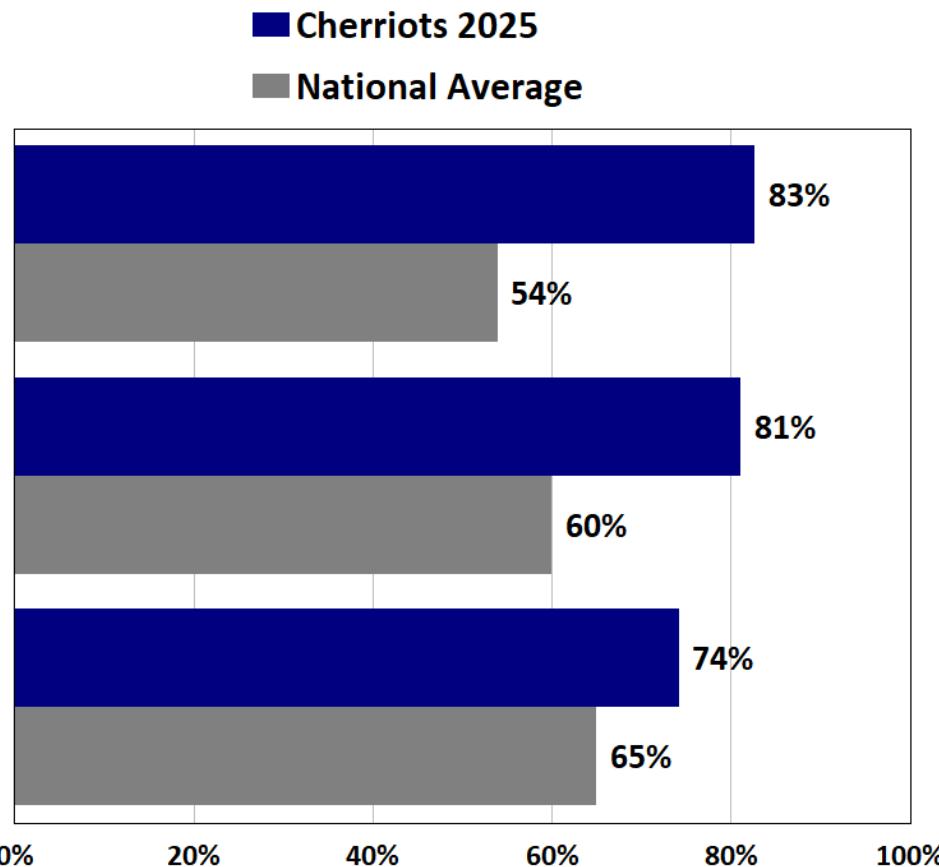
BUS ratings are well above the National Average for **Timeliness**

- Travel Time: **+30%**
- Arrival Time: **+34%**
- Bus Frequency: **+22%**

BUS Services Rated ABOVE the National Average in ALL Areas Assessed



The bus routes are conveniently located for me



The price to ride the bus is a reasonable value

The buses operate at the times that I need them

BUS ratings are well above the National Average for **Convenience**

- Location: **+29%**
- Price: **+21%**
- Hours of Operation: **+9%**

BUS Services Rated ABOVE the National Average in ALL Areas Assessed

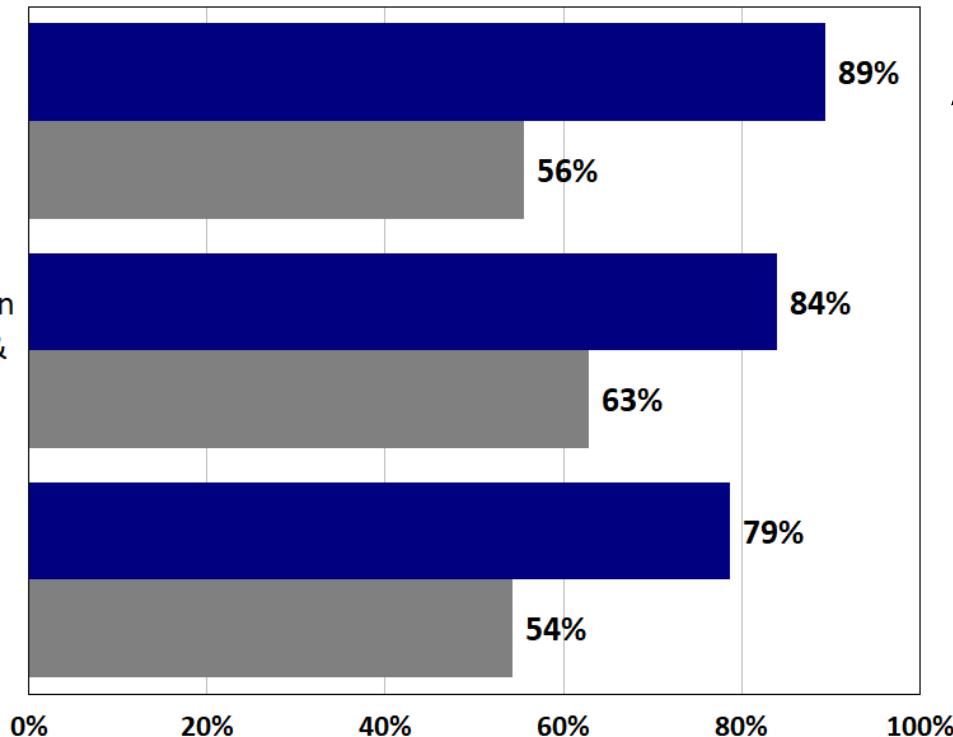


■ Cherriots 2025
■ National Average

I understand Cherriots' available routes, & I am confident navigating the system

It is easy to get information about Cherriots' services & route schedules

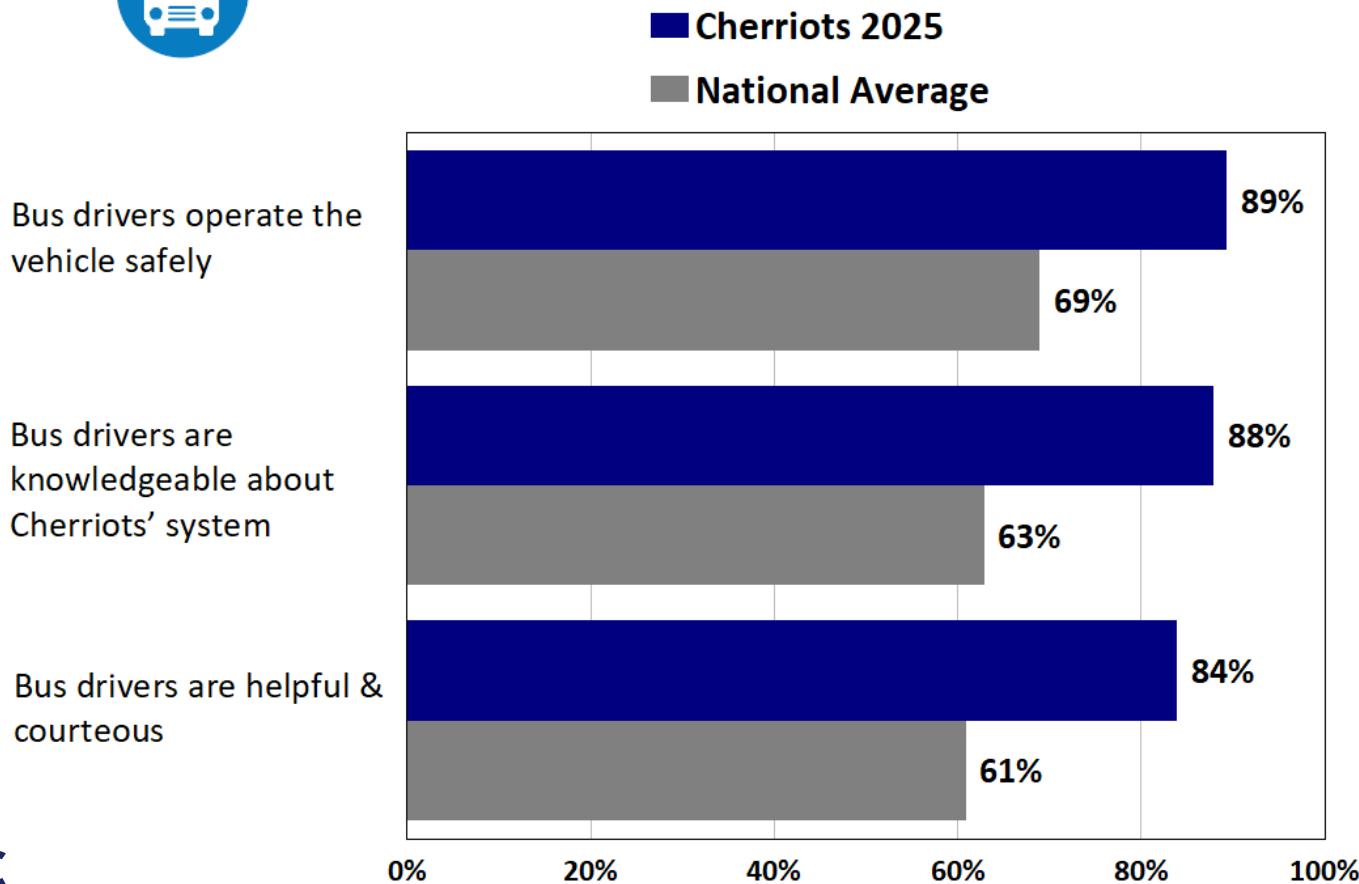
It is easy to find out if the buses are running on schedule



BUS ratings are well above the National Average for **Information Provided**

- Navigation: **+33%**
- Getting Information: **+21%**
- Schedule Changes: **+25%**

BUS Services Rated ABOVE the National Average in ALL Areas Assessed

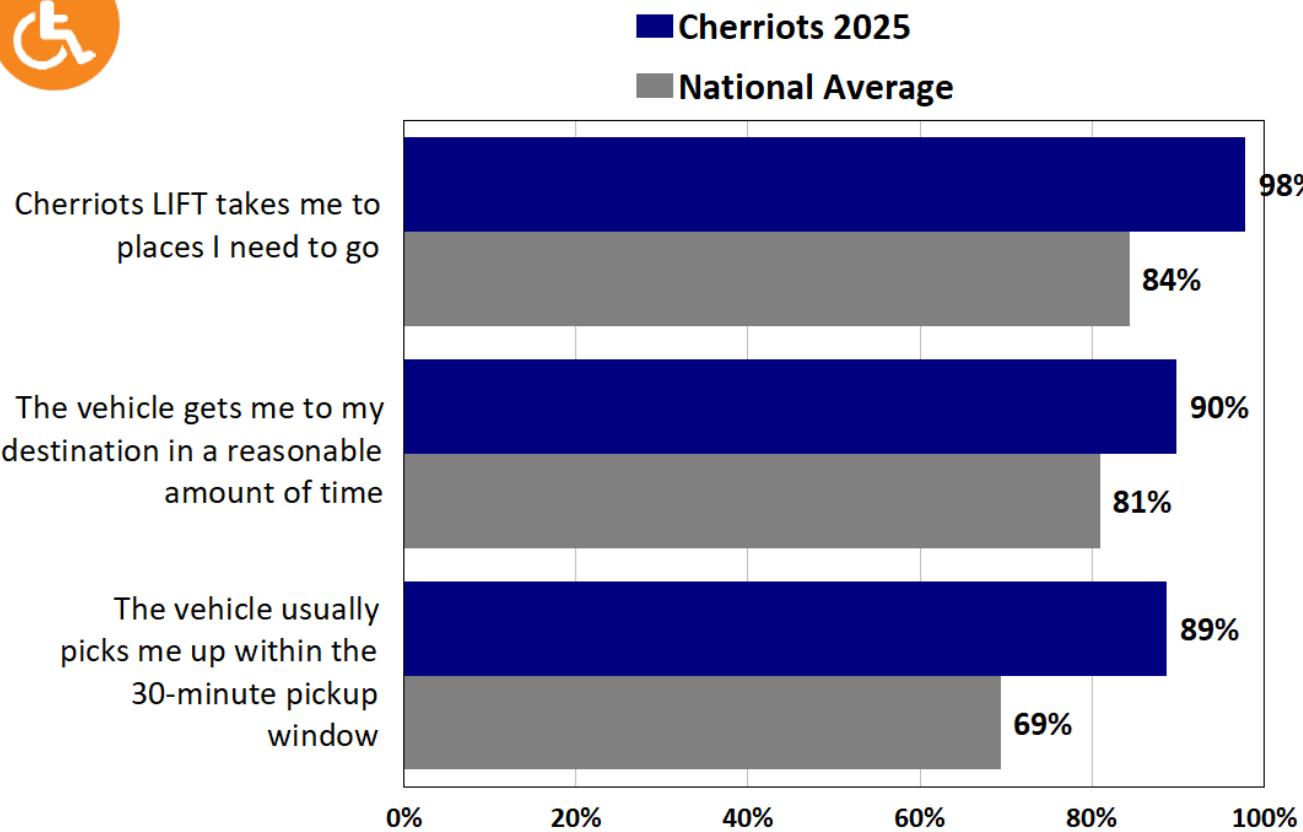


BUS ratings are well above the National Average for **Bus Operator Satisfaction**

- Safe Driving: **+20%**
- Operator Knowledge: **+25%**
- Helpfulness & Courtesy: **+23%**



Other Key LIFT Findings



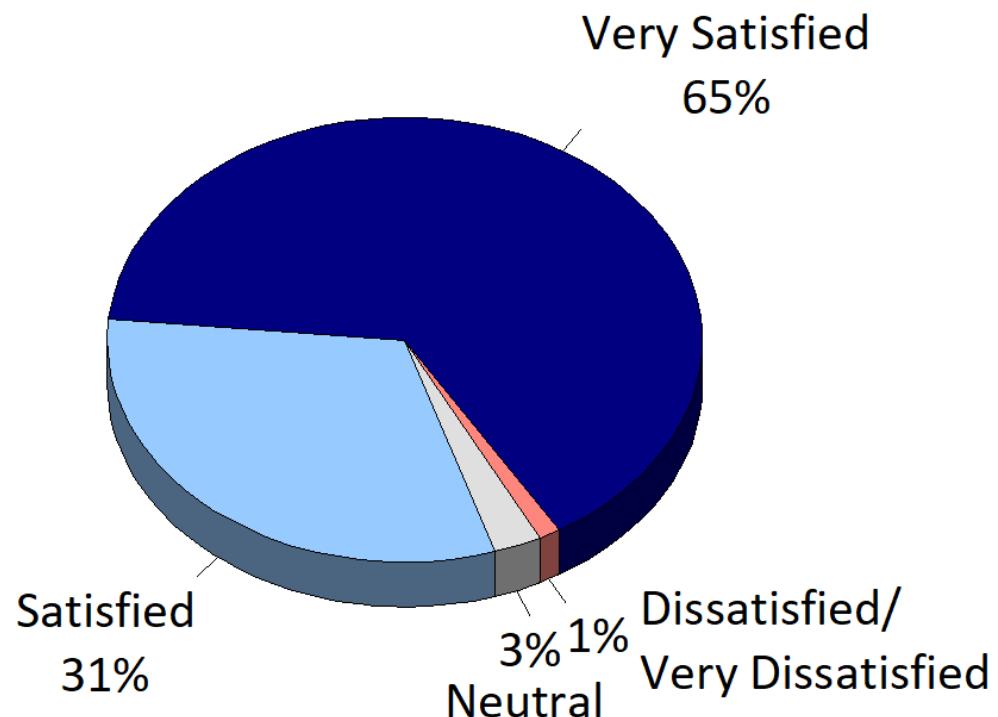
LIFT ratings are well above the National Average for **Timeliness/Usefulness**

- Access to Destinations: **+14%**
- Travel Time: **+9%**
- Arrival Time: **+20%**

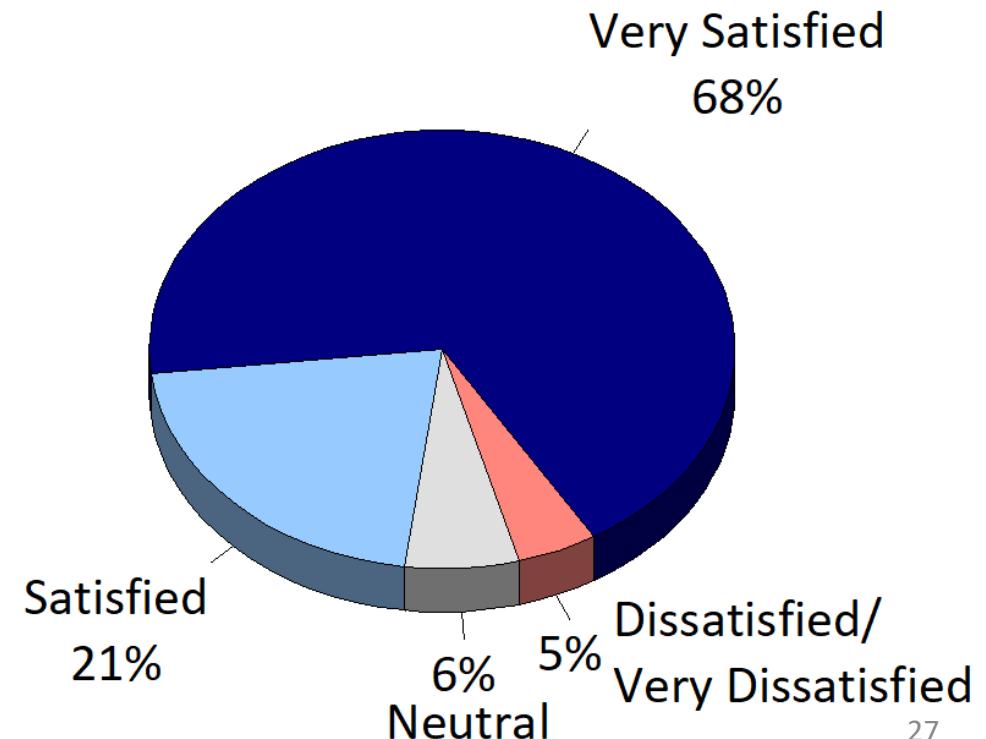
LIFT Customer Satisfaction with Cherriots' Employees



How satisfied are you with the performance of Cherriots' LIFT operators?



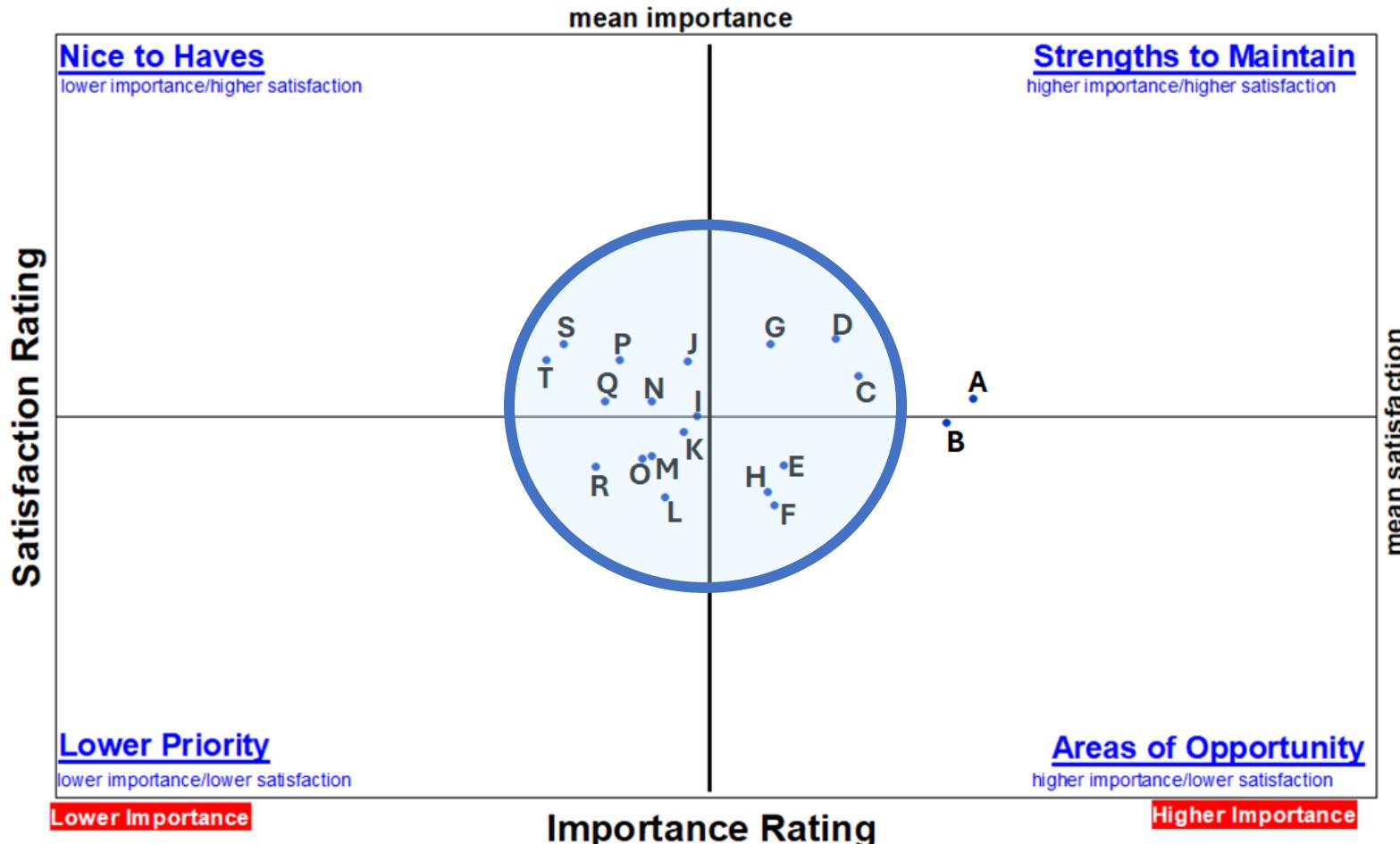
How satisfied are you with the performance of Cherriots' Customer Service staff?



MAJOR FINDING #5: OPPORTUNITIES FOR IMPROVEMENT

OPPORTUNITIES FOR IMPROVEMENT

Key Driver Analysis



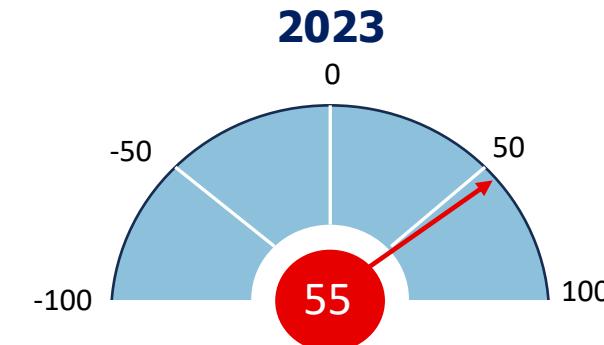
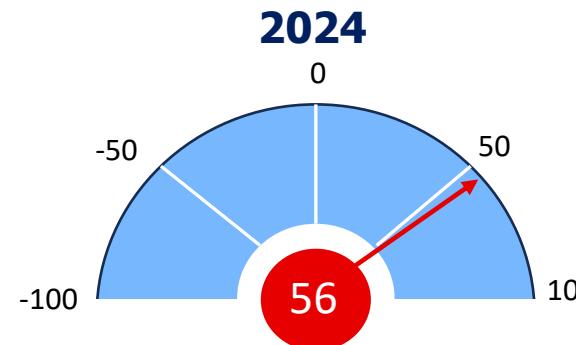
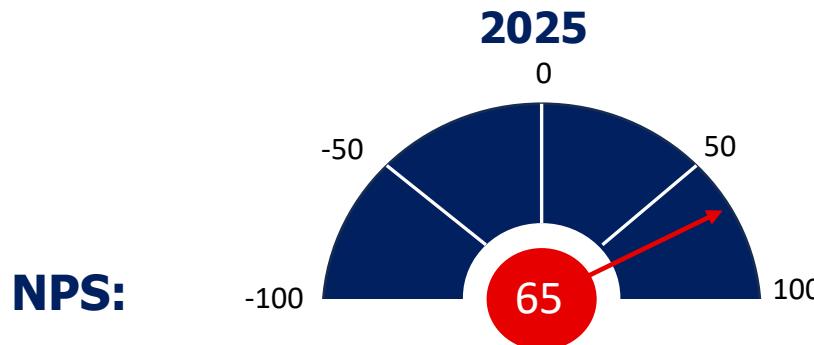
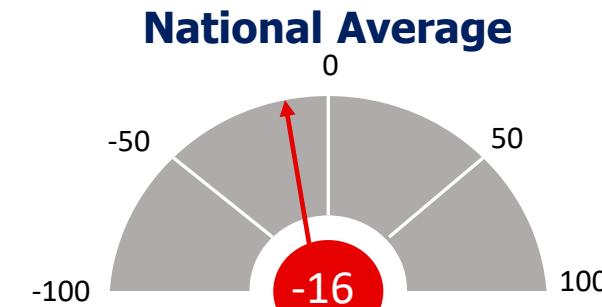
- A. I feel safe riding the bus
- B. Bus usually runs on time
- C. Bus is clean
- D. Buses operate on the days that I need them
- E. I feel safe & secure waiting for my bus
- F. Buses operate at times that I need them
- G. Bus drivers operate the vehicle safely
- H. Frequency of service is satisfactory
- I. Bus routes are conveniently located for me
- J. Bus gets me to my destination in a reasonable amount of time
- K. The price to ride is a reasonable value
- L. Bus stops I use are clean
- M. Bus drivers are helpful & courteous
- N. I am satisfied with cost of fares charged
- O. It is easy to find out if buses are running on schedule
- P. There is enough seating/space on the bus
- Q. It is easy to get information about Cherriots' services
- R. Cherriots' bus stations, shelters, & stops are well maintained
- S. I understand Cherriots' available routes, & I am confident navigating the system
- T. Bus operators are knowledgeable about Cherriots' system

MAJOR FINDING #6: CHERRIOTS' NET PROMOTER SCORE IS FAR ABOVE THE INDUSTRY AVERAGE

Net Promoter Score: 81-Points above the National Average



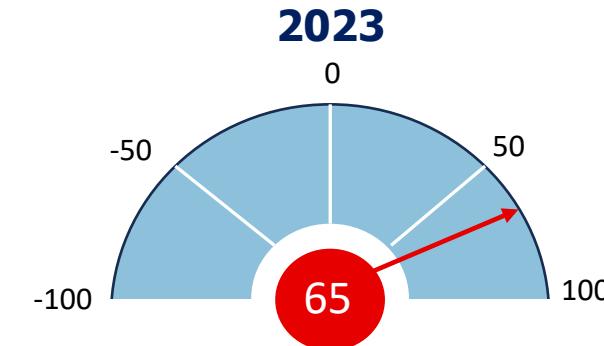
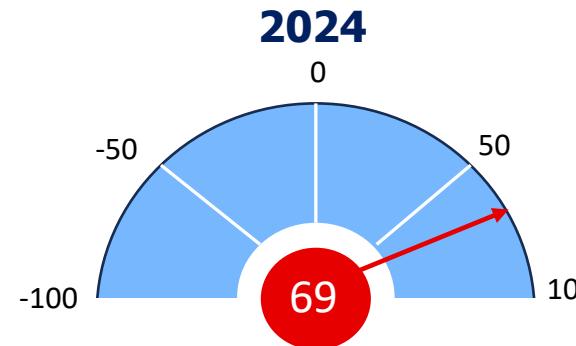
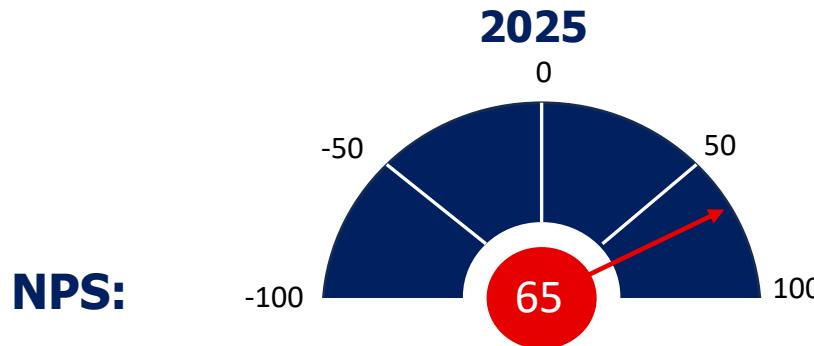
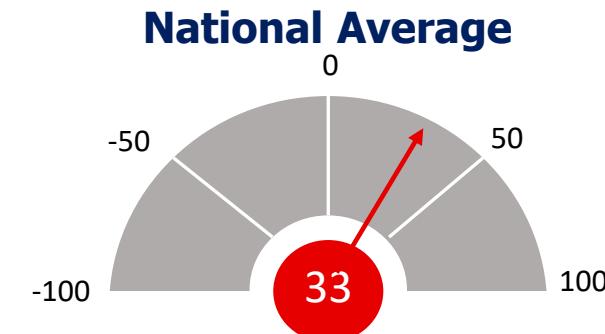
- 72% of bus customers are “**Promoters**,” meaning they selected 9 or 10 when asked, “On a scale of 0-10, how likely would you be to recommend Cherriots bus service to a friend or family member”



Net Promoter Score: 32-Points above the National Average



- **76%** of bus customers are **“Promoters,”** meaning they selected 9 or 10 when asked, “On a scale of 0-10, how likely would you be to recommend Cherriots bus service to a friend or family member”



PART 2: COMMUNITY VALUE SURVEY

METHODOLOGY: Community Value Surveys



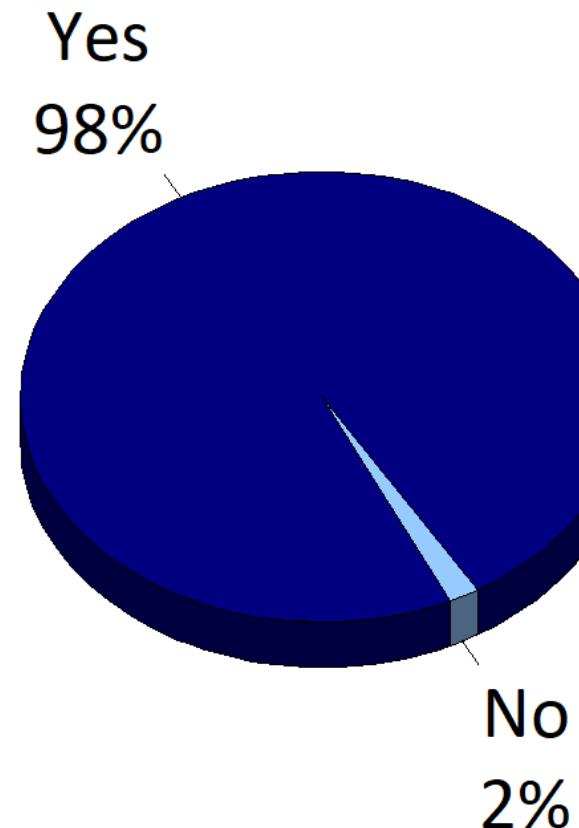
- The survey was administered in September - October
- Address-based random sample
- Participants were initially mailed information about the survey; ETC Institute then followed-up by phone, email, text, and targeted social media to maximize participation
- The survey was available in multiple languages
- The goal for the survey was 400; a total of 413 were completed
- Margin of error +/- 4.9% at the 95% confidence level.

COMMUNITY VALUE SURVEY FINDINGS

Percentage of Salem Area Residents Who Were Aware of Cherriots



Do you know that Cherriots is the public transportation provider in the Salem region?

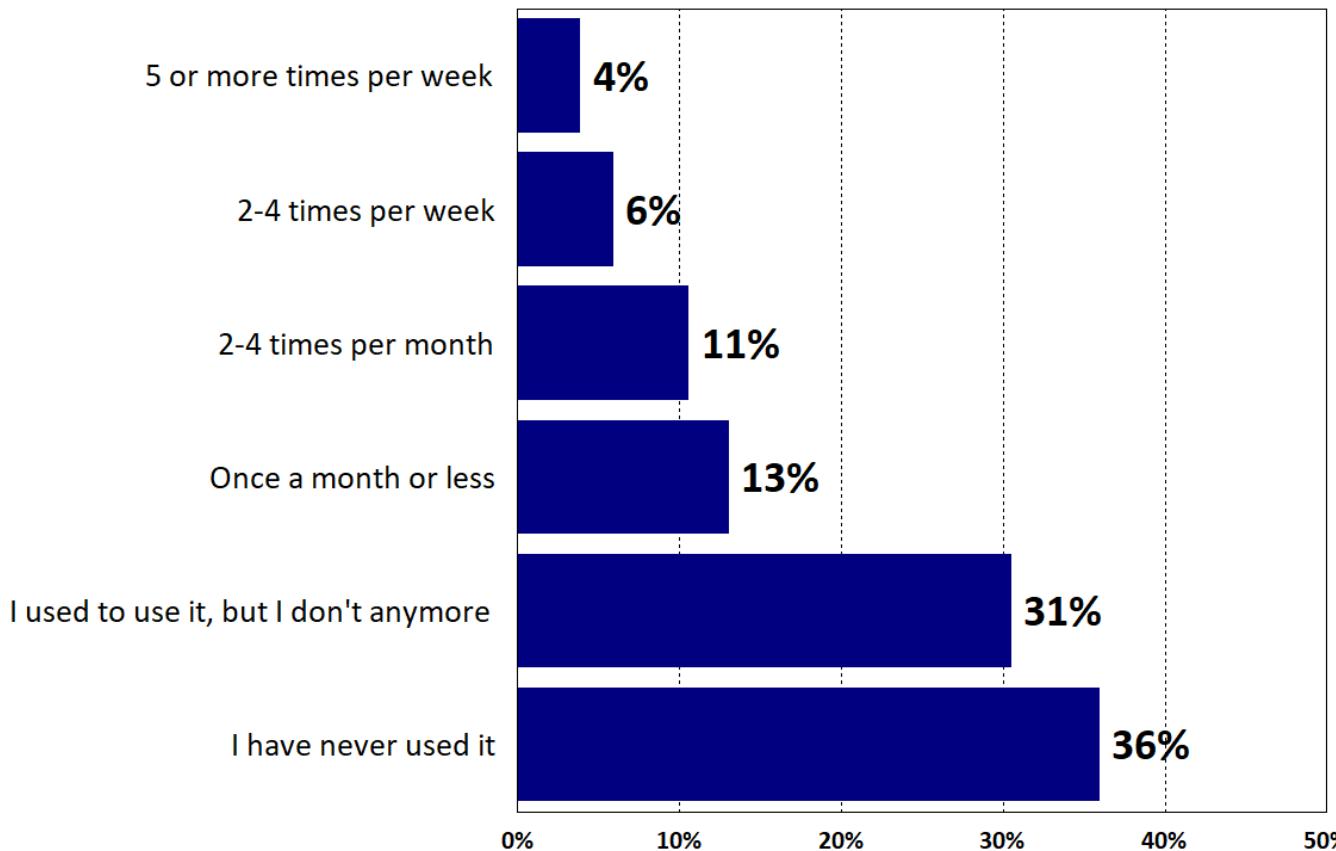


*Each year has had at least 98% awareness

How Often Residents of the Salem Area Report Using Cherriots



On average, how often do you use Cherriots (Buses or LIFT)?



- 34% of respondents are Cherriots Customers.
- 36% of respondents have never used Cherriots.
- 31% of respondents used to use Cherriots but do not anymore.
- Most former riders stopped because they got access to a car

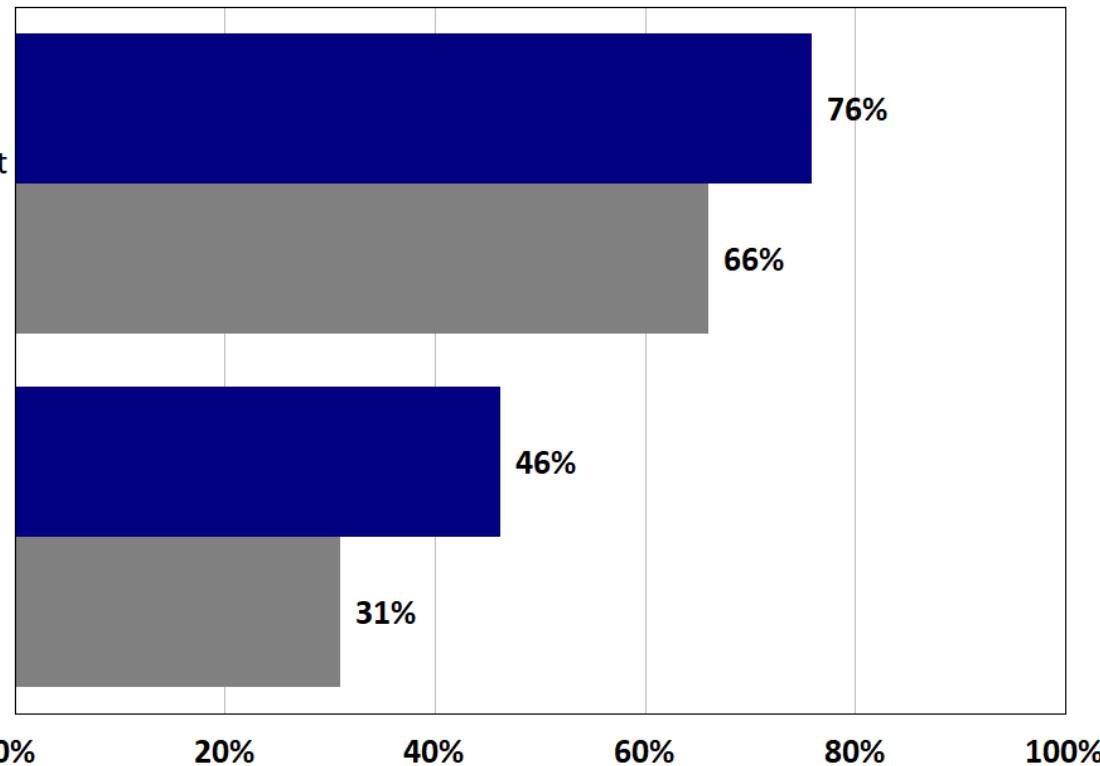
COMMUNITY AND PERSONAL VALUE vs. National Average



% Agree/Strongly Agree

■ Cherriots 2025 ■ National Average

Cherriots is a valuable part
of the community



Cherriots is valuable to
me personally

- Valuable part of the community (+10%)
- Valuable to you (+15%)

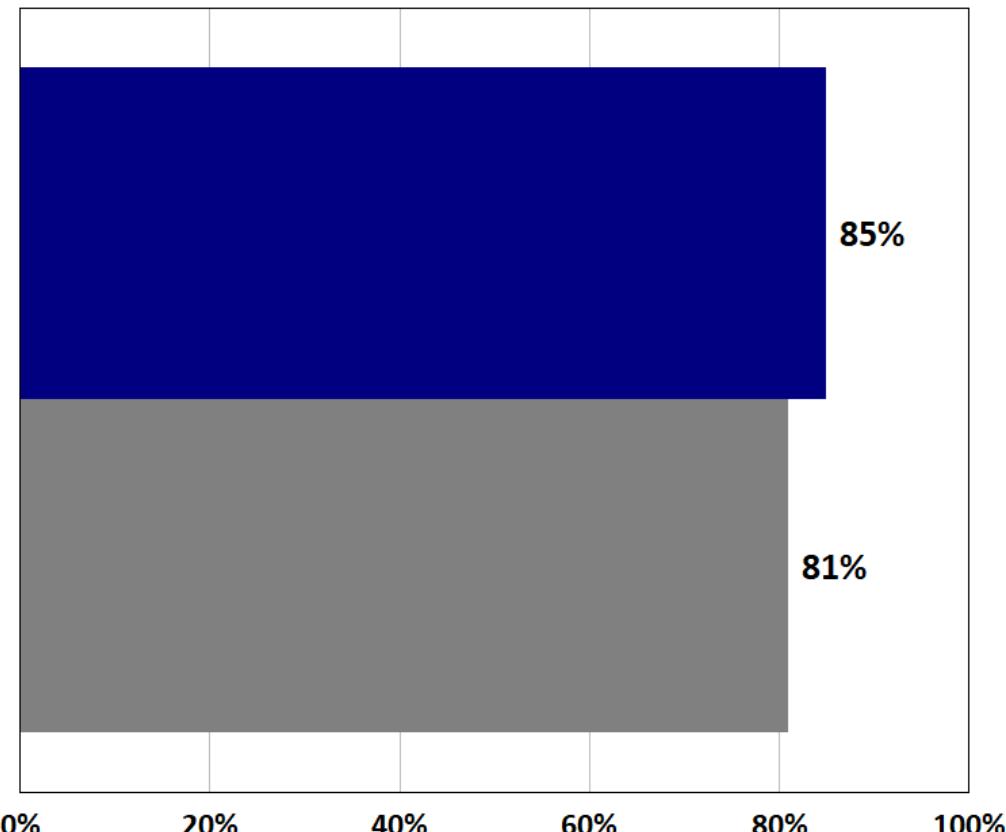
TRANSPORTATION NEEDS vs. National Average



% Agree/Strongly Agree

■ Cherriots 2025 ■ National Average

Cherriots provides transportation options to people with special mobility needs



- Cherriots rated higher in providing transportation options to people with special mobility needs

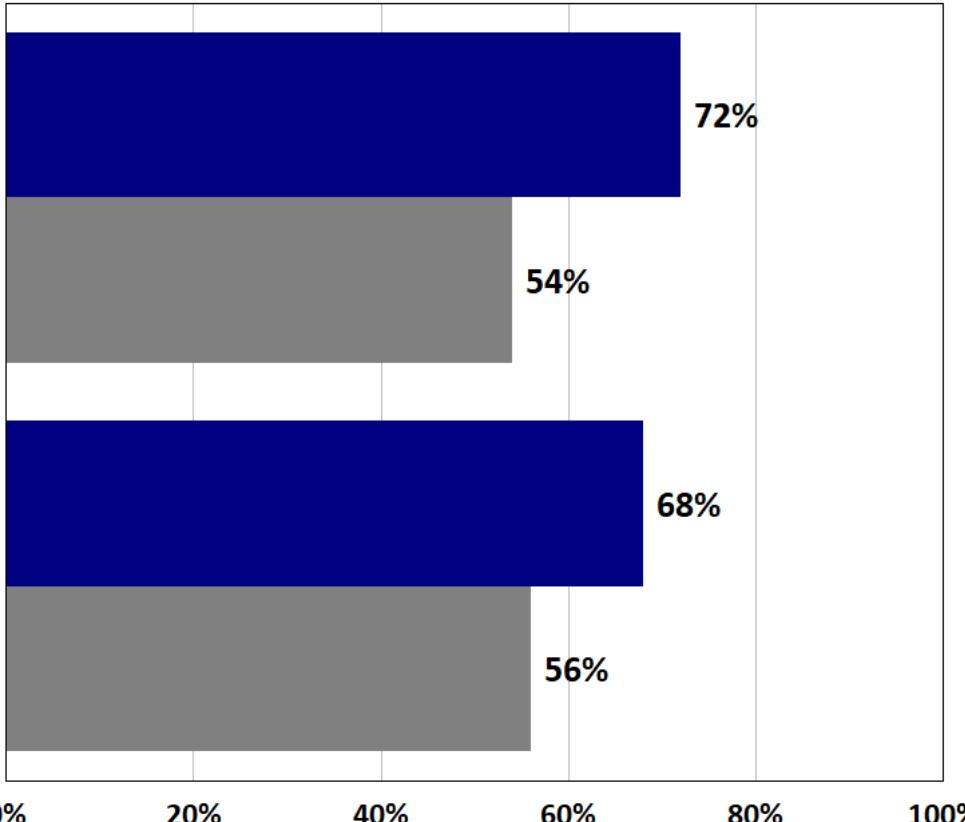
EMPLOYMENT AND QUALITY OF LIFE VALUE vs. National Average



% Agree/Strongly Agree

■ Cherriots 2025 ■ National Average

Cherriots helps provide job opportunities in the region

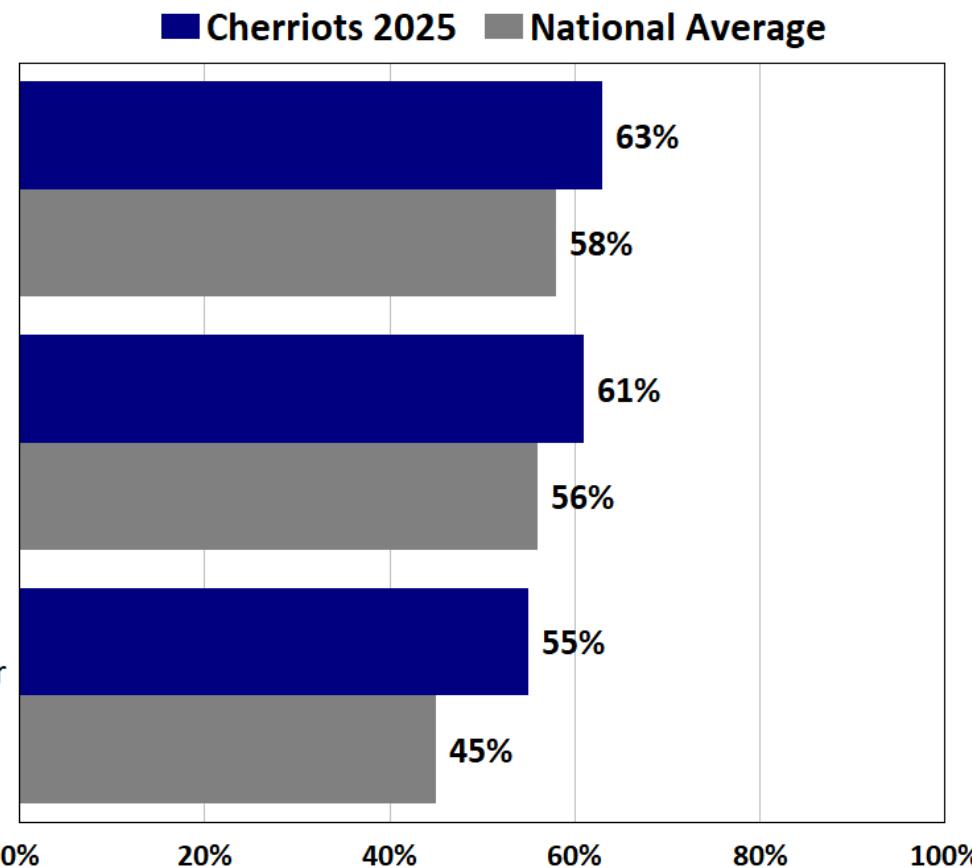


- Cherriots rated higher in providing job opportunities and improving quality of life than the National Average

VALUE TO ROADS & ENVIRONMENT vs. National Average



% Agree/Strongly Agree

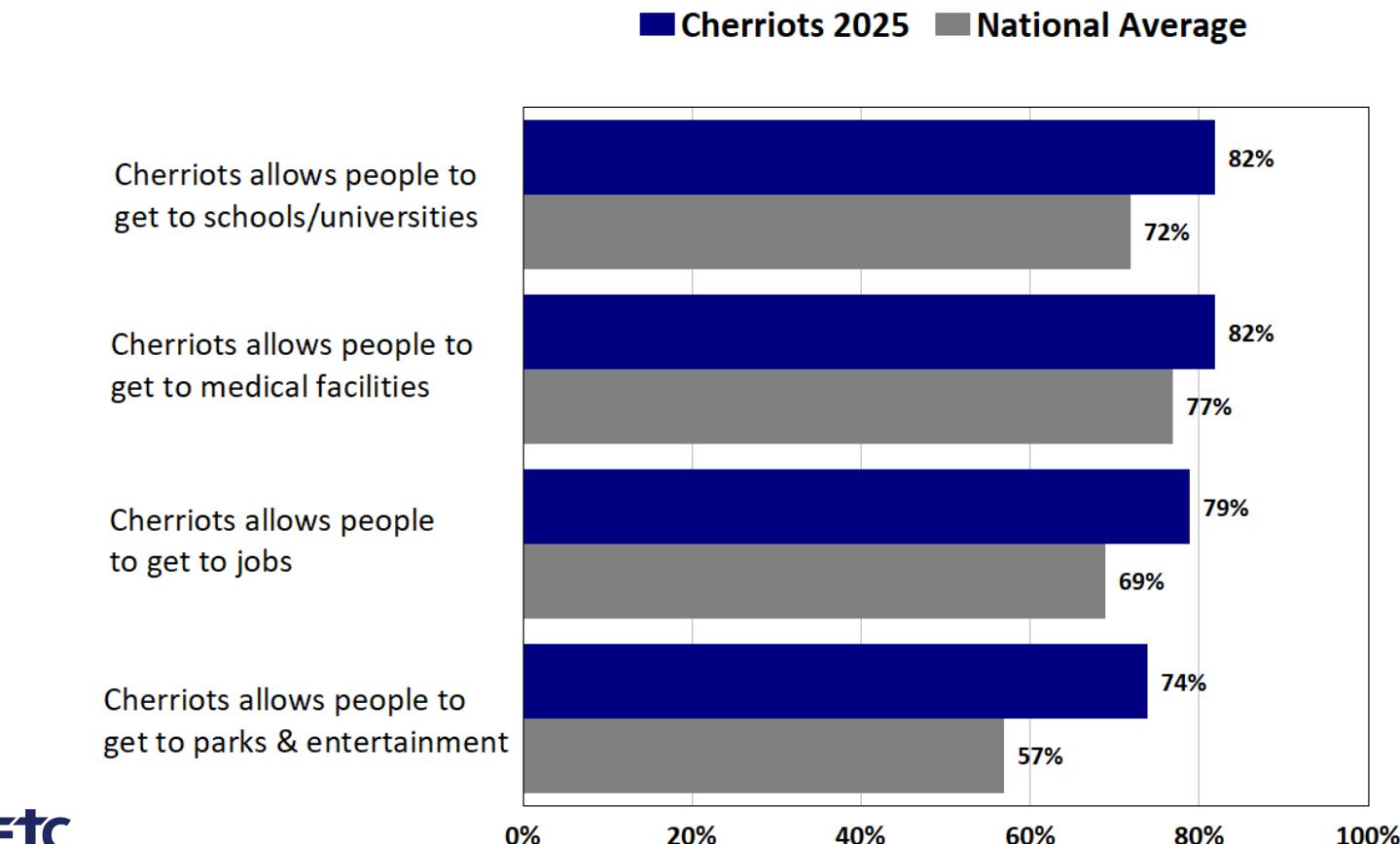


- Cherriots rated higher in reducing pollution, reducing traffic congestion, and making roads safer for all users than the National Average

ACCESS TO IMPORTANT DESTINATIONS vs. National Average



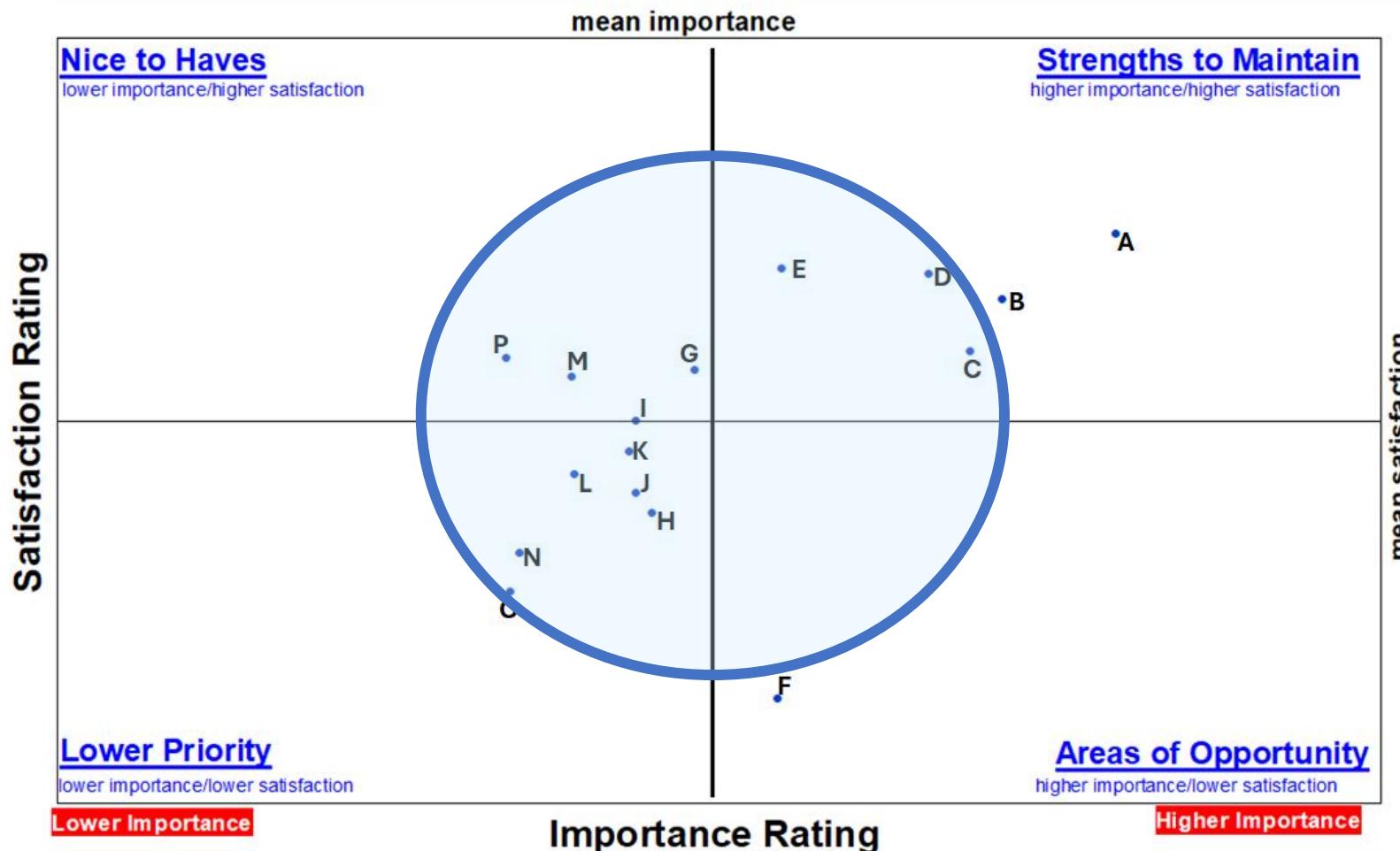
% Agree/Strongly Agree



- Cherriots rated higher than the National Average in providing access to all important destinations

2025 STRENGTHS TO MAINTAIN

Key Driver Analysis: Residents

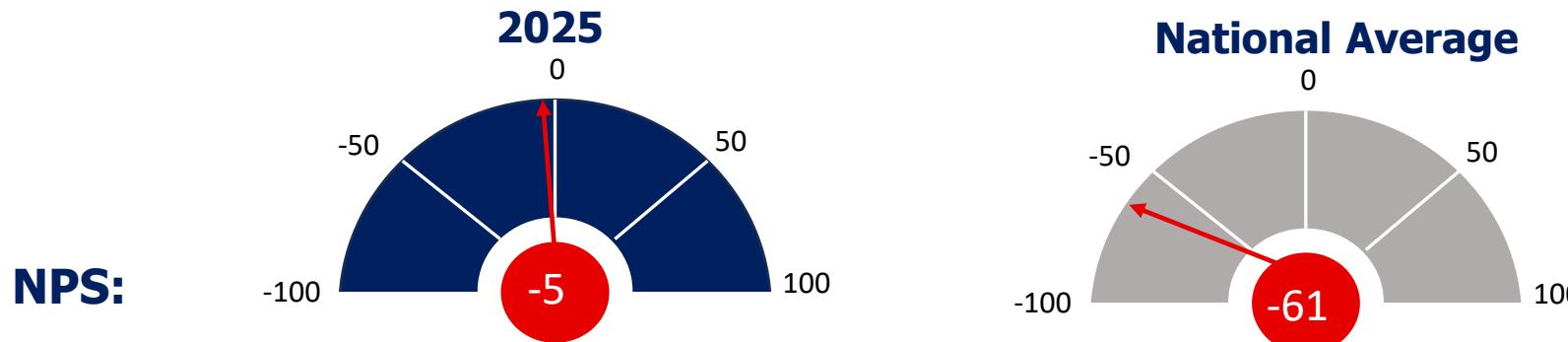


- A. Cherriots provides transportation options to people with special mobility needs
- B. Cherriots allows people to get to jobs
- C. Cherriots provides affordable transportation options
- D. Cherriots allows people to get to medical facilities
- E. Cherriots allows people to get to schools/universities
- F. Cherriots manages financial resources well**
- G. Cherriots provides a safe transportation alternative
- H. Cherriots supports community businesses
- I. Cherriots improves the quality of life in the community
- J. Cherriots reduces traffic congestion
- K. Cherriots provides access to the region/adjacent cities & counties
- L. Cherriots reduces pollution and helps the environment
- M. Cherriots helps provide job opportunities in the region
- N. Cherriots makes roads safer for all users
- O. Cherriots provides opportunities for locating affordable housing
- P. Cherriots allows people to get to parks & entertainment

Net Promoter Score: COMMUNITY *Comparison to National Average*



- Cherriots Community Net Promoter Score is 56 points higher than the National Average
- While only 10% of respondents are weekly riders, 35% are Promoters



PART 3: EMPLOYEE ENGAGEMENT SURVEY

METHODOLOGY

Employee Engagement Survey



- Survey administration was conducted by ETC Institute from September 8th through September 22nd, 2025, following Cherriots' outreach efforts.
- The survey was designed by Cherriots and ETC with the goal of better understanding employee satisfaction regarding several key topics.
- Initially, QR codes were posted throughout each facility, and survey links were sent to each employee with a registered email address (mostly Non-Represented Employees). ETC then conducted intercept surveys with employees who had not completed it online.
- Overall, 147 surveys were completed which is a 59% employee response rate (3% participation increase from 2024!)

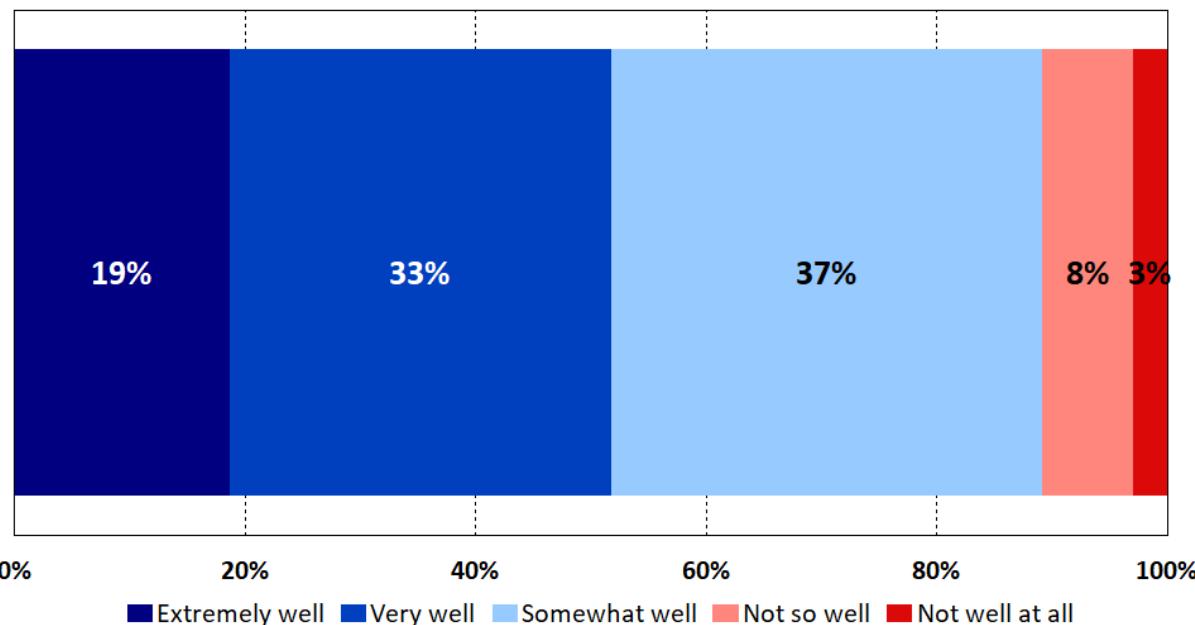
Mission/Vision Statements

The agency's Mission and Vision statements reflect the organization's core purpose and what it strives to achieve as we look towards the future.

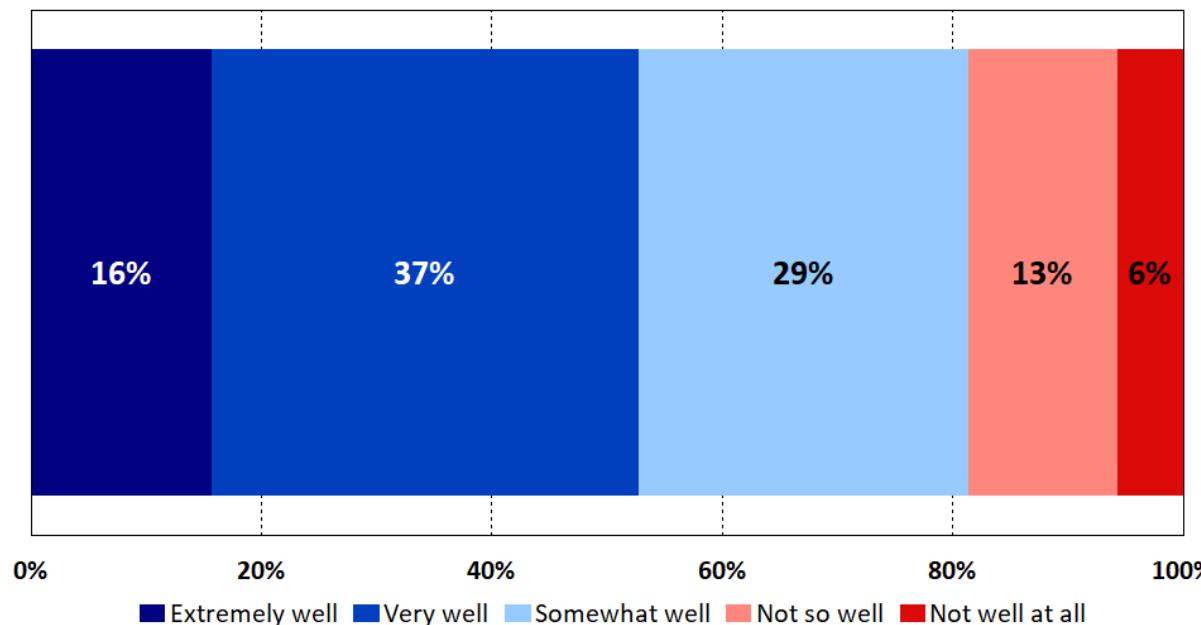
Cherriots Mission Statement: *Creating community connections.*

Cherriots Vision Statement: *We deliver valued mobility options that inspire community pride.*

From your perspective, how well do you feel the mission statement represents what Cherriots strives to achieve?



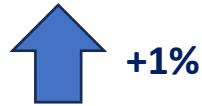
From your perspective, how well do you feel the vision statement represents what Cherriots strives to achieve?



Overall Satisfaction Increase



I foresee myself working at Cherriots one year from now



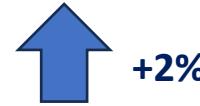
+1%

I foresee myself working at Cherriots five years from now



+4%

In general, I am satisfied in my role



+2%

I have pride when I say I work at Cherriots



+2%

I would recommend working at Cherriots to a friend or family member



+13%

Overall Satisfaction increased from 2024 in all areas!

42 Out of 48 Areas Tested Showed Increased Satisfaction From 2024



Cherriots positively impacts people's lives  +20%

I am expected to make independent decisions to fulfill my responsibilities  +14%

I understand existing mission, vision, & values of Cherriots  +12%

My work is rewarding & purposeful  +9%

My direct supervisor treats employees fairly & with respect  +14%

My direct supervisor recognizes when I do a good job  +12%

My direct supervisor communicates information effectively to me  +11%

Morale in my department is good  +9%

The technology within my department supports the needs of my job  +9%

I receive the training I need to perform my job well  +9%

Highlighted increases in Agreement/Satisfaction from 2024

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- 1. Most residents of the Salem area think Cherriots provides value to the Community:** 97% of LIFT Customers, 91% of Bus Customers, and 76% of community members surveyed.
- 2. Cherriots is setting the standard for service delivery**
 - Cherriots' customer satisfaction ratings are above the National Average in nearly all areas and have mostly improved from last year's great results.
3. The majority of Cherriots' customers would like funding for Cherriots to increase over the next five years.
4. Residents feel that Cherriots can take them to all of the important places they need to go, and most have a desire for increased funding.
5. Employee Satisfaction increased in most areas, while there is still a hunger for continuing to increase Communication.