



2017 TRAVEL AND AWARENESS SURVEY

Mobility and technology trends

*An analysis of survey results to support the Regional
Travel Options program and partners*

oregonmetro.gov/travel-options-research

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Survey Purpose

The Metro Regional Travel Options (RTO) program helps residents make transportation choices with marketing, travel information, incentives, and small capital improvements.

Every few years, Metro conducts the RTO Travel and Awareness Survey. The purpose of the survey is to gain insight into current regional trends in transportation choices, examine willingness of drivers to start using sustainable travel modes (bike, walk, public transit, or carpool), and focus RTO program efforts that will work for Metro residents and maximize results. The research objectives of the 2017 Travel and Awareness Survey are to:

- Measure awareness of and participation in travel options and supportive programs, in addition to other transportation trends throughout the Metro region
- Advise marketing, education and outreach strategies by identifying potential audiences for promoting RTO programs, partners, and resources
- Inform the RTO Strategy and Transportation System Management and Operations plan, as well as various other efforts within Metro's Planning and Development Department

Methodology

DHM Research consulted with Metro on the telephone survey, which was conducted September 14 - 21, 2017. DHM collected responses from 601 residents in Multnomah, Clackamas, and Washington Counties, with 50% reached by cell phone. The survey averaged 20 minutes, and respondents were offered entry in a drawing to win one of ten \$50 gift cards. Respondents were asked a variety of questions about their awareness and use of various transportation modes and travel information. If provided, home addresses and work intersections of respondents were geocoded for additional analysis. The margin of error is $\pm 4.0\%$ (the amount that the results could differ from the actual population due to sampling error).



Introduction

Measuring how travel options and transportation trends are impacting residents is an important part of providing equitable transportation access to all Metro residents. The region has seen new transportation services arrive rapidly over the past few years — car sharing services Zipcar, Car2go, and ReachNow operate over 1,000 vehicles combined in the region, and ridehailing services Uber and Lyft were projected to have completed seven million rides in Portland in 2017.^{1,2} The 2017 Travel and Awareness Survey added questions to measure use of these mobility services, as well as the rise of digital travel information in the region, with the purpose of identifying when and how residents use these features, and the role these trends play in choosing and using travel options.

This report first lays out the 2017 survey demographics and locations of respondents (Figure 1). Following is the state of awareness of RTO-related programs and the residents who are more likely to engage with those programs. Next, the report provides a look into when and how residents access travel information, especially through technology, and what influences their choices. This includes acknowledging and understanding barriers that residents may face when choosing travel options including housing location, lifestyle, and safety. Results on the status of ridehailing and carsharing in the region follow, including analysis on the cost, trip purpose, and user demographics. Finally, trends around carpooling reveal a potential for increasing this mode in the future.

There is plenty of additional research to be done on the topics covered in this report. It is important to note that this survey does not try to answer all questions about new mobility services and technology, or answer why residents may behave in particular ways or predict how residents might behave in the future.

This report is one in a series of two. More results from the 2017 Travel and Awareness Survey are available in the [Choosing and Using Travel Options](#) report, including information about attitudes towards commuting and using travel options more.



Survey Demographics

Quotas were set by gender, age, and county using the US Census (2010), with increased effort for a representative sample across household income and race or ethnicity. Percentages may add up to under or over 100 due to rounding.

Gender

Female	51%
Male	49%
Non-Binary or Gender Non-Conforming	0%

Age

16-29	23%
30-44	27%
45-64	32%
65+	13%
Refused	5%

County

Clackamas	23%
Multnomah	46%
Washington	31%

Race or ethnicity

African	1%
Asian/Pacific Islander	6%
Black/African American	1%
Hispanic/Latino	4%
Middle Eastern/ North African	<1%
Native American/ American Indian	1%
Slavic	<1%
White/Caucasian	85%
Other response	3%
Refused	1%

Allows for multiple responses. Census categories differ.

Household income

<\$25,000	6%
\$25-50,000	15%
\$50-75,000	14%
\$75-100,000	16%
\$100,000+	26%
Refused	23%

Education

<High School	4%
GED/HS	11%
Trade/2-Year	28%
Bachelor's/4-Year	37%
Graduate Degree+	19%
Refused	1%

Persons per household

1	2	3+
14%	29%	54%
Refused	3%	

Years living in metro region

<5	10%
6-10	8%
11-20	31%
20+	48%
Refused	3%

Respondent Locations

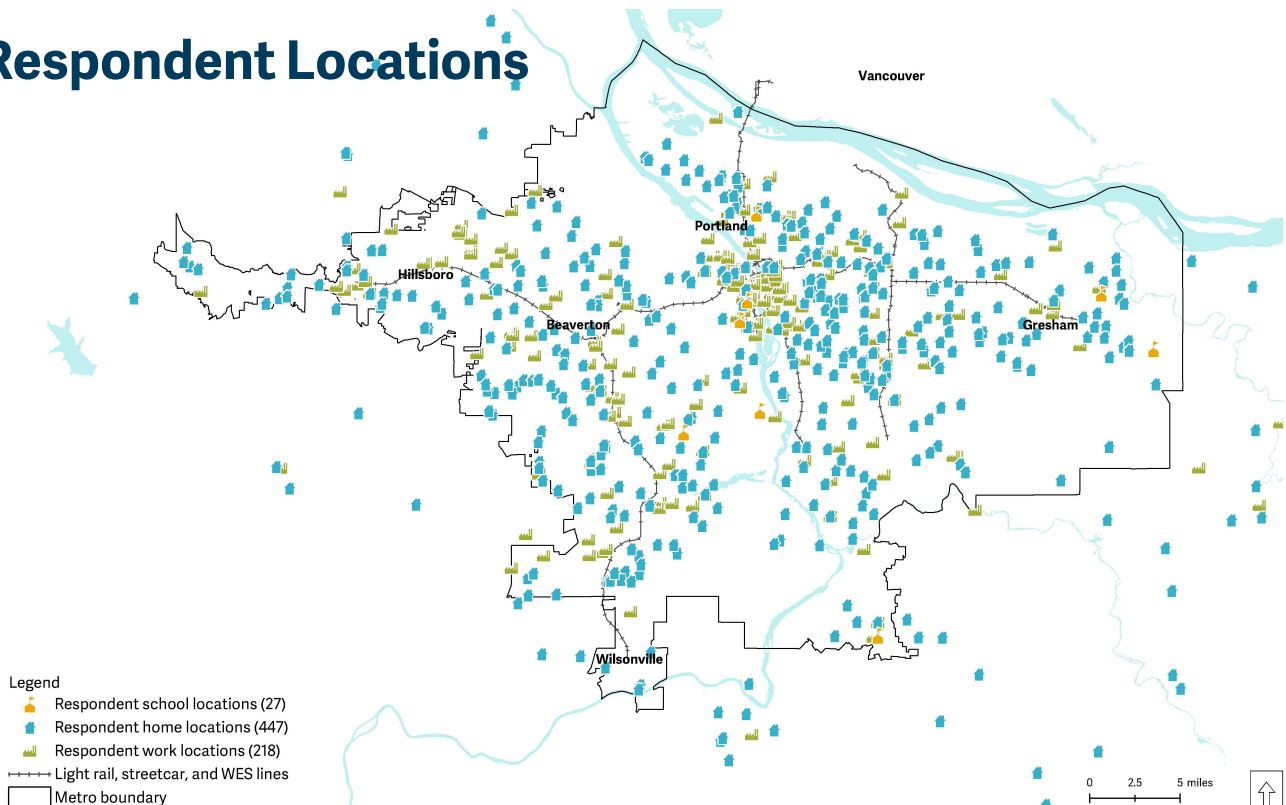


Figure 1: School, home and work locations of respondents. Locations that repeat, such as apartments without unit numbers, large work facilities, or schools are included in the feature counts. Locations outside the map view are not included in the feature counts. Map: 2017 RTO Survey Data, RLIS, Metro Data Resource Center.

Awareness of RTO Programs

The following is not an exhaustive list of RTO programs, and more programs may be included in future surveys.

Awareness of RTO programs and services has generally remained stable over time. For each service or program, those who bike as one of their two main modes are the most aware group of residents. To increase awareness across the population, it is worth paying attention to cyclists' current levels of engagement and sources of information and whether other residents, even those who don't bike, can be engaged in a similar manner.

BIKETOWN is a bike share program introduced in July 2016 with 1,000 bright orange Nike bikes at 100 stations. Bikes can be rented through station kiosks or by using a smartphone app. Of the programs mentioned in the survey, BIKETOWN is the most familiar to residents (65%).³ Most residents have seen the bikes around Portland, regardless of the county they are from, and 3% of all residents have used the bikes before. Awareness was highest among residents 30-44 and 45-64 (68%, 74%), those with incomes of \$100,000 per year or more and those with graduate degrees (74%, 75%). Existing bike owners are significantly more familiar with the program (71%), as well as those who commute to work or school by bike (96%).

Sunday Parkways are free events that open up city streets to bicyclists and pedestrians.⁴ Multnomah County residents remain much more aware of this program (57%) than residents in Washington or Clackamas Counties (35% and 30%). 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 increases with education level — from 31% for residents with a high school education or less, up to 56% for those with graduate degrees. Awareness of Sunday Parkways is higher among women (48%), bike owners (48%), those who are multimodal (52%), residents who walk as a main mode of transportation (53%), and residents who are interested in biking or walking more (61%, 54%). There is no difference in awareness between residents with children in the household and those without (44% to 43%). Overall, four in ten residents are aware of Sunday Parkways and one in ten of all residents participate.

Safe Routes to School (SRTS) creates safer, convenient, and fun opportunities for children to bicycle and walk to and from school, and receives the second highest amount of participation after Sunday Parkways at 9% of all residents.⁵ Awareness of SRTS continues to increase (31%, up from 26% in 2014). The increase in awareness is driven by gains in Washington County since 2014, rising 9 percentage points (22% to 31%). Awareness is higher among those who bike, walk, or are multimodal (37%-46%). Unsurprisingly, residents with children in the household are more aware of the program than residents without (37% to 26%). About three in ten residents who are aware of SRTS have walked or biked more for school trips in the last year because of the program (29%, n=184).

Oregonian Crossing is 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. The campaign had success on social media, with over 300,000 views on the memorable Sasquatch video.⁶ About 1 in 3 residents are familiar with Oregonian Crossing, and women are more aware of the campaign than men (40% to 31%).

SmartTrips delivers information such as bike maps, walking maps, and transit guides to residents. From 2014-2016, SmartTrips delivered to over 70,000 households.⁷ Awareness of SmartTrips has leveled off to 23%, rising from 18% in 2010 and decreasing slightly from 26% in 2014. Women and those with graduate degrees are more likely to be aware of SmartTrips than their counterparts. Surprisingly, those who had moved in the last five years were not significantly more aware of SmartTrips than other residents, despite new movers likely receiving a mailer about the program when they moved.

The **Drive Less Challenge** is a two-week challenge in September to reduce one million drive-alone miles, which includes incentives and events.⁸ Since 2014, awareness decreased in Multnomah County (from 21% to 13%) and Clackamas County (from 23% to 18%). However, awareness of the Drive Less Challenge remains stable across the region thanks to Washington County residents, who are significantly more aware than they were in 2014 (from 16% to 27%). Awareness is highest among residents 30-44 (24%) and those with incomes of \$75,000-\$100,000 (34%).

Awareness of the **Bike More Challenge**, a competition among workplaces where employees log their bike trips each May, decreased by 13 percentage points from previous years (30% in 2012, 2014 to 17% in 2017).⁹ This may be due to the change in the organization's name, from Bicycle Transportation Alliance (BTA) to The Street Trust, as well as the Bike More Challenge moving from September to May. Awareness of this program is highest among residents 30-44 and 45-64 compared to other age groups (21%, 19%). These two age groups tend to exhibit the highest levels of awareness with programs and services entirely, perhaps due to their work environment. More than half of bike commuters are familiar with this program. Overall, 14% of residents who had heard of the challenge reported that they were motivated to travel more by bike after the challenge ended (n=102).

Trends in Travel Information

Regardless of mode choice, smartphone apps are now the top travel information source for residents (Figure 2). Reliance on smartphone apps increased across all mode users since 2014, with decreases in reliance from all other sources. Of residents who drive, those over 65 are much more likely than younger residents to rely on radio or TV news (54%, n=65). Conversely, residents under 45 are much more likely to rely on smartphone apps (55%) and GPS systems (26%) than older residents (n=261). GPS systems are also more utilized by residents with incomes of \$75,000 per year or more (26%, n=241). Washington County residents are more likely than residents from other counties to rely on word of mouth from their family and friends (13%, n=173). Transit riders under 45 are more likely than older residents to get their travel information from smartphone apps (59%, n=63). Of residents who bike, there were no significant demographic differences in travel information sources. Of residents who walk for transportation, those under 45 are the most likely of all age groups to rely on smartphone apps as well (52%), and they also tend to rely on apps than other sources, including using no source of travel information at all (n=91).

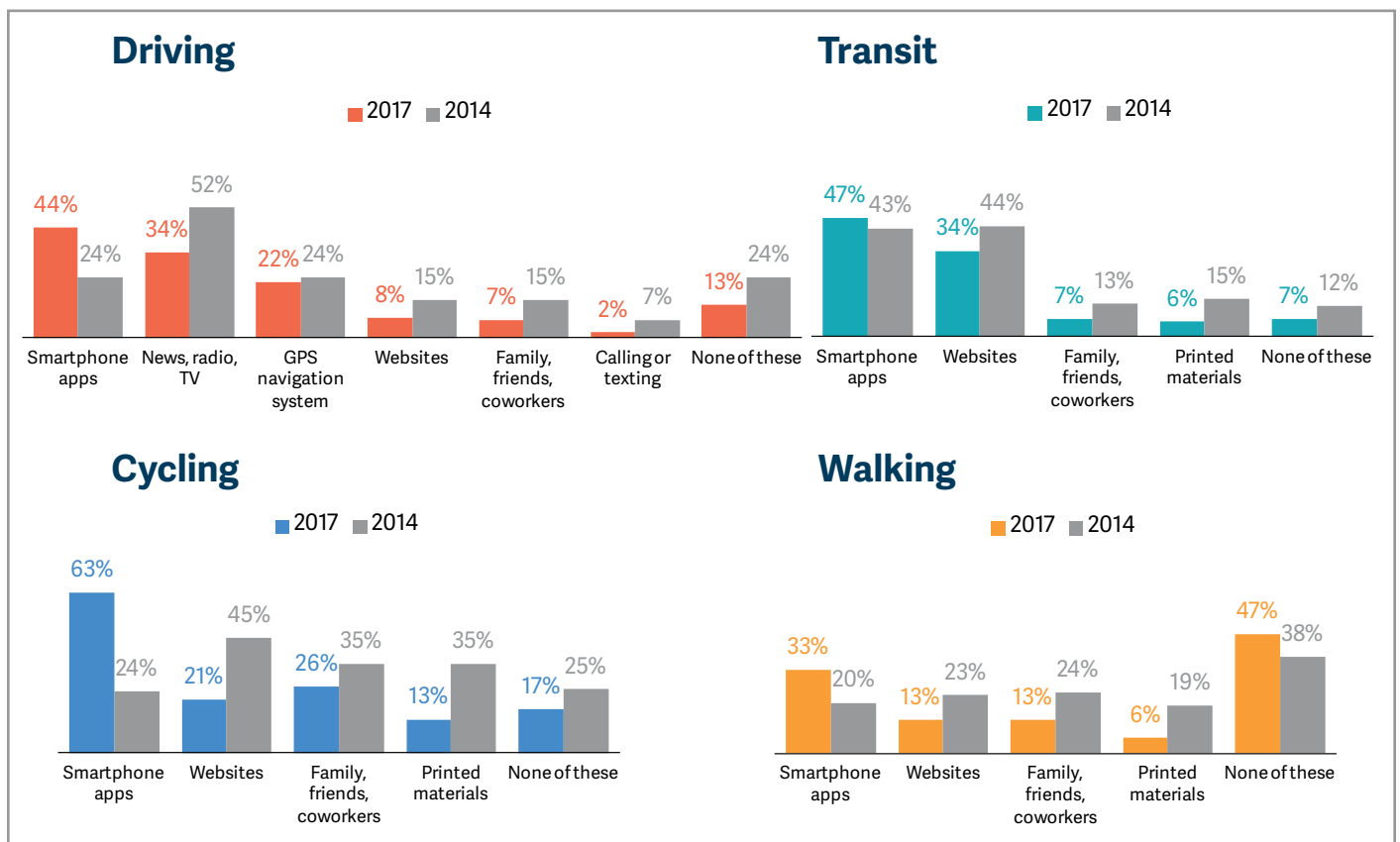


Figure 2: Results of Q20/27/30/38, which ask "(Before or while driving), Where do you get (updated traffic information from/information to help you plan [trips on your bicycle/public transit trips/walking trips])?" Response categories were randomized and respondents were prompted to select all that apply. Percentages may add up to under or over their sum or 100 due to rounding or respondents choosing multiple modes and travel information sources.

Residents often seek out travel information on their own, but they also can receive travel information in various forms through their employer. From 2015-2016, over 175,000 employees were eligible for an employee commute options (ECO) program, where employers with at least 100 employees per worksite provide incentives for using travel options to commute to work.^{10,11} Employees at smaller worksites can also receive similar incentives. Overall, 22% of employed or student residents reported receiving commute-related travel information from work or school (n=429). While not all commuters receive commute information, it does have impacts for a few groups. Forty-eight percent of residents who received information said it influenced their choice in how to get to work or school. Sixty-nine percent of those residents who were influenced by commute information from their employer or school are under the age of 30 and 84% have household incomes of less than \$50,000.

While sixteen percent of all residents get travel information from websites, 49% get information from smartphone apps. To determine which websites and apps residents use most, respondents were asked to list up to three they use for any type of trip. Google Maps is the most popular website for travel information, as well as the most popular smartphone app (Figure 3). TriMet is second for those who get their travel information on a website. Waze, the traffic and navigation app follows second for smartphone users.

Apps or wearable devices that track trips or steps had low usage across the region, with 6% using a Fitbit or Apple Watch, 17% using Google Maps, and 14% reported general "smartphone" use for this purpose. These responses indicate that residents do not interact with trip tracking apps on a regular basis, and instead use Google Maps to look up the mileage of a previous trip or rely on the ability of most smartphones to count steps.

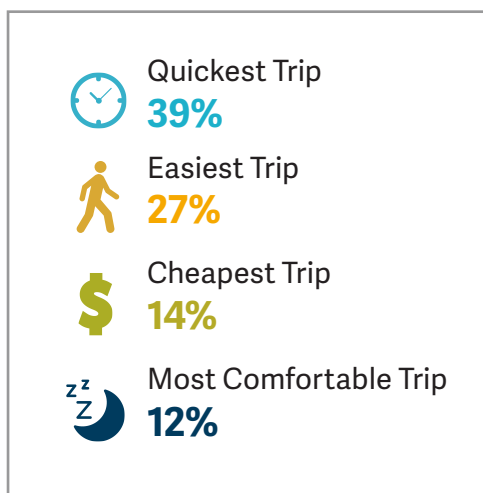


Figure 4: Results of Q48 (n=601), which asks "Let's say you're looking up information about the next trip you'll take. What is most important in your choice of how to travel?" Respondents selected one answer. Seven percent of respondents said they did not know which option was most important to them. Percentages may add up to under or over 100 due to rounding.

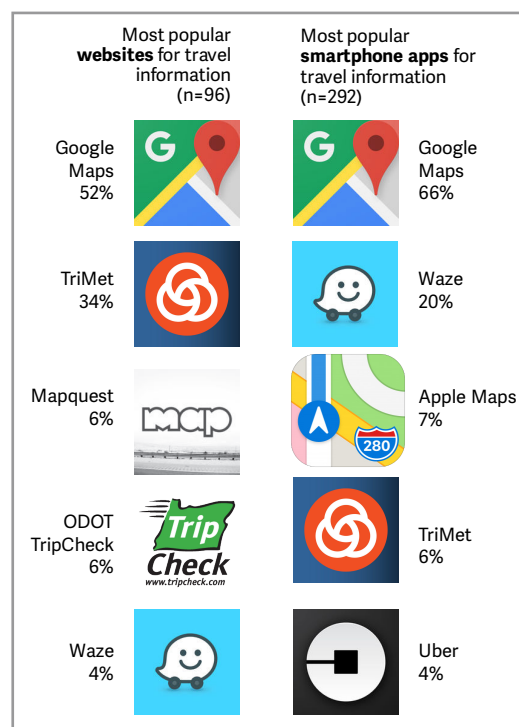


Figure 3: Results of Q44/45, which ask "Thinking about your trips over the last month, which (websites/apps) did you use the most for transportation information?" No categories were predetermined. Respondents provided up to three open responses. Totals or percentages may add up to under or over their sum or 100 due to rounding or respondents listing multiple websites and apps.

When using a smartphone or website, residents typically search for travel information on the day of their trip (74%, n=339). Residents often choose the quickest or easiest trip when planning a route, with cost and comfort playing a less important role (Figure 4). There were no obvious differences in demographics when it comes to planning a trip.

However, there are barriers from having a convenient or easy trip from home using travel options. As housing costs rise in the Metro region, residents may find themselves moving further away from work or school to more affordable neighborhoods that often lack convenient travel options.¹² To assess where transportation is a motivator for housing choice, respondents were asked what their priority was when choosing a new home if they have moved within the last five years. Residents reported that they choose affordability (39%) over commute (13%) or location to amenities (20%) as the most important factor when selecting a new place to live (n=154).

Nineteen percent of residents reported that the options were all of equal importance, and 8% stated that none of the options provided were important factors. These questions had no statistical differences in demographics.

Carsharing and Ridehailing

Six percent of residents use carsharing services and most use them rarely (Table 1). Carshare use is highest among Multnomah County residents (9%, n=276), likely because of the location of carsharing service areas. Ridehailing has had much more of an impact on residents. About one-third of residents have used a ridehailing app in the last year and most report using it rarely. Users are evenly spread across the Metro region, and travel options users are slightly more likely to use ridehailing (49%-41%) than drivers (36%).

Few residents use ridehailing to commute and instead use the service for leisure activities or other reasons (Table 2). Twenty-nine percent of users indicated they use the service for another reason. This would likely include airport rides or anything a respondent would not consider a commute, leisure activity, or an errand. Ridehailing trips to get to leisure activities decreases with age, but using the service for other reasons increases with age. Multnomah County ridehail users are much more likely to use the service for errands and shopping (19%) than are ridehail users in Clackamas and Washington Counties (8% and 6%).

Over two-thirds of ridehail users ride with other passengers, and nearly half of rides cost \$10-\$20 (Figure 5). It is unclear from the data whether these users would have driven alone otherwise, so there is potential to explore this area further in future research.

Some residents report that ridehailing has caused them to drive less or reduce the number of vehicles in their household. One in four Multnomah County ridehail users say they now drive less than usual (26%), compared to 10% in Clackamas County and 17% in Washington County. Multnomah County ridehail users are also the most likely to say they have reduced or considered reducing the number of vehicles in their household since they began using ridehailing services (12%). Census data shows car ownership in each county at approximately 2 cars per household.¹³ The number of cars per household reported in this survey decreased from 2.2 cars in 2014 to 2.1 cars in 2017. This small difference cannot be attributed to ridehailing or carsharing. This area could be tracked into the future, along with additional data, to determine what the role of ridehailing and carsharing might be on vehicle ownership.

Table 1: Percentages of responses to mode choice and mode frequency. Results of Q7/8, which ask "Over the course of this year, how often did you (use a ridehailing app, such as Uber or Lyft/borrow and drive a carshare vehicle such as Car2go, ReachNow, or Zipcar)? Totals or percentages may add up to under or over their sum or 100 due to rounding or respondents choosing multiple modes and purposes.

Response Category (n=601)	Ridehailing	Carsharing
Monthly or more	15%	2%
Daily	0%	0%
A few times a week but not every day (Weekly)	4%	1%
Several times a month (Monthly)	10%	1%
Rarely	22%	4%
Never	64%	94%

Table 2: Percentages of responses to mode purpose. Results of Q39 (n=218), which asks "Select all of your purposes of using ridehailing." Totals or percentages may add up to under or over their sum or 100 due to rounding or respondents choosing multiple modes and purposes.

Response Category (n=218)	Ridehailing
To get to work	13%
To get to school	3%
For shopping or errands	13%
For leisure activities, like going to a restaurant or movie	65%
None of the above	29%

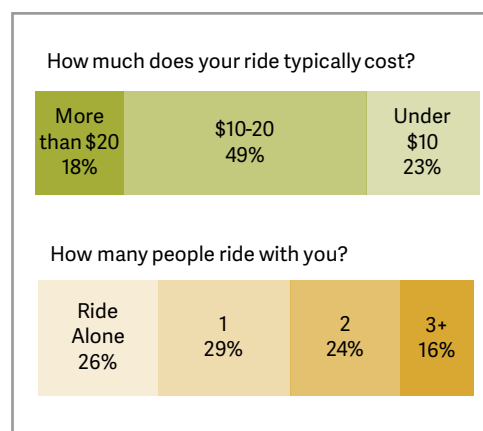
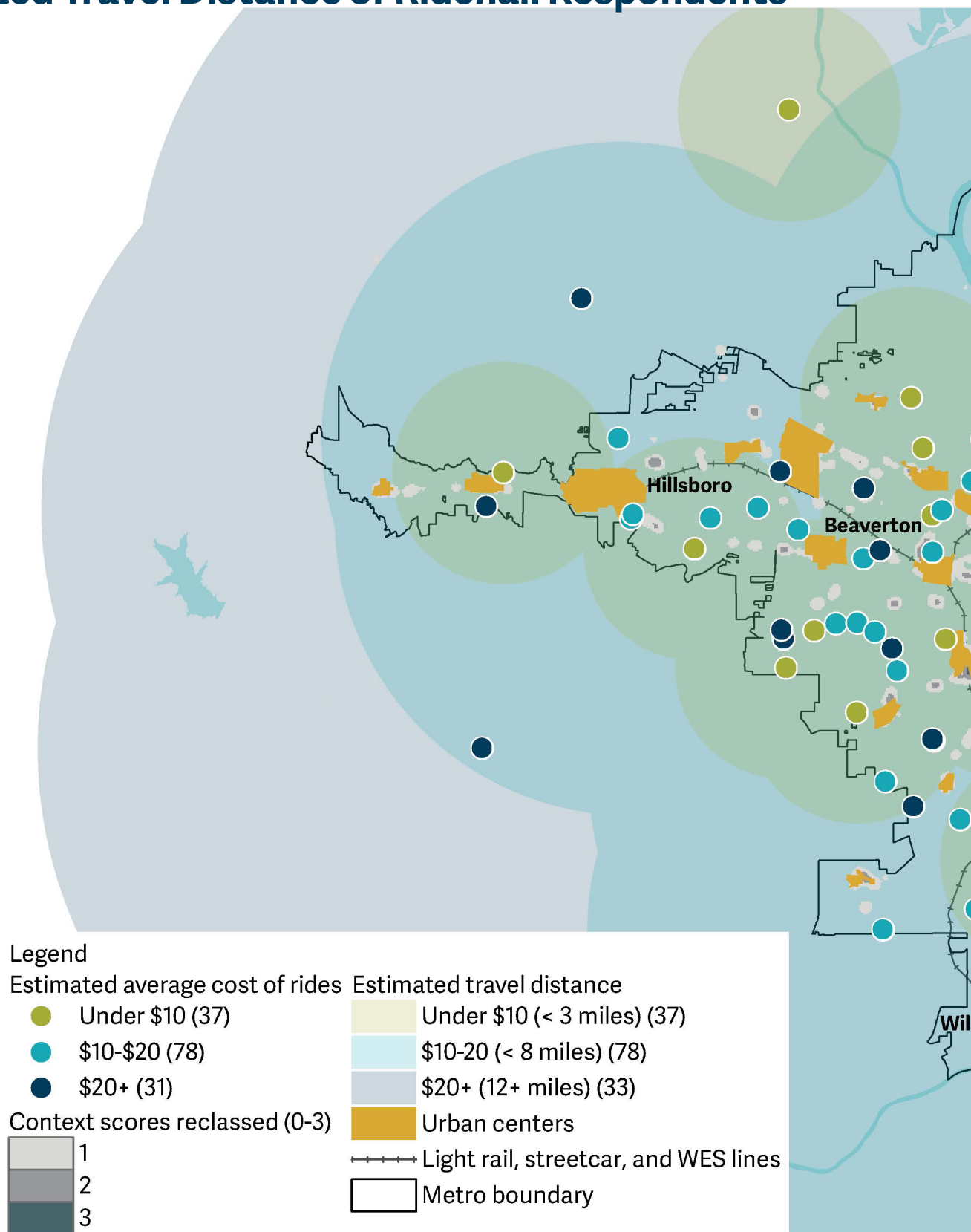


Figure 5: Results of Q40 (n=218), which asks "In general, how many people ride with you when you use a ridehailing app? This does not include the driver." (Top). Five percent reported they did not know. Q41 (n=218) asks "On average over the last year, were your rides under \$10, \$10-\$20, or more than \$20?" (Bottom). Ten percent reported they did not know. Percentages may add up to under or over 100 due to rounding.

Estimated Travel Distance of Ridehail Respondents



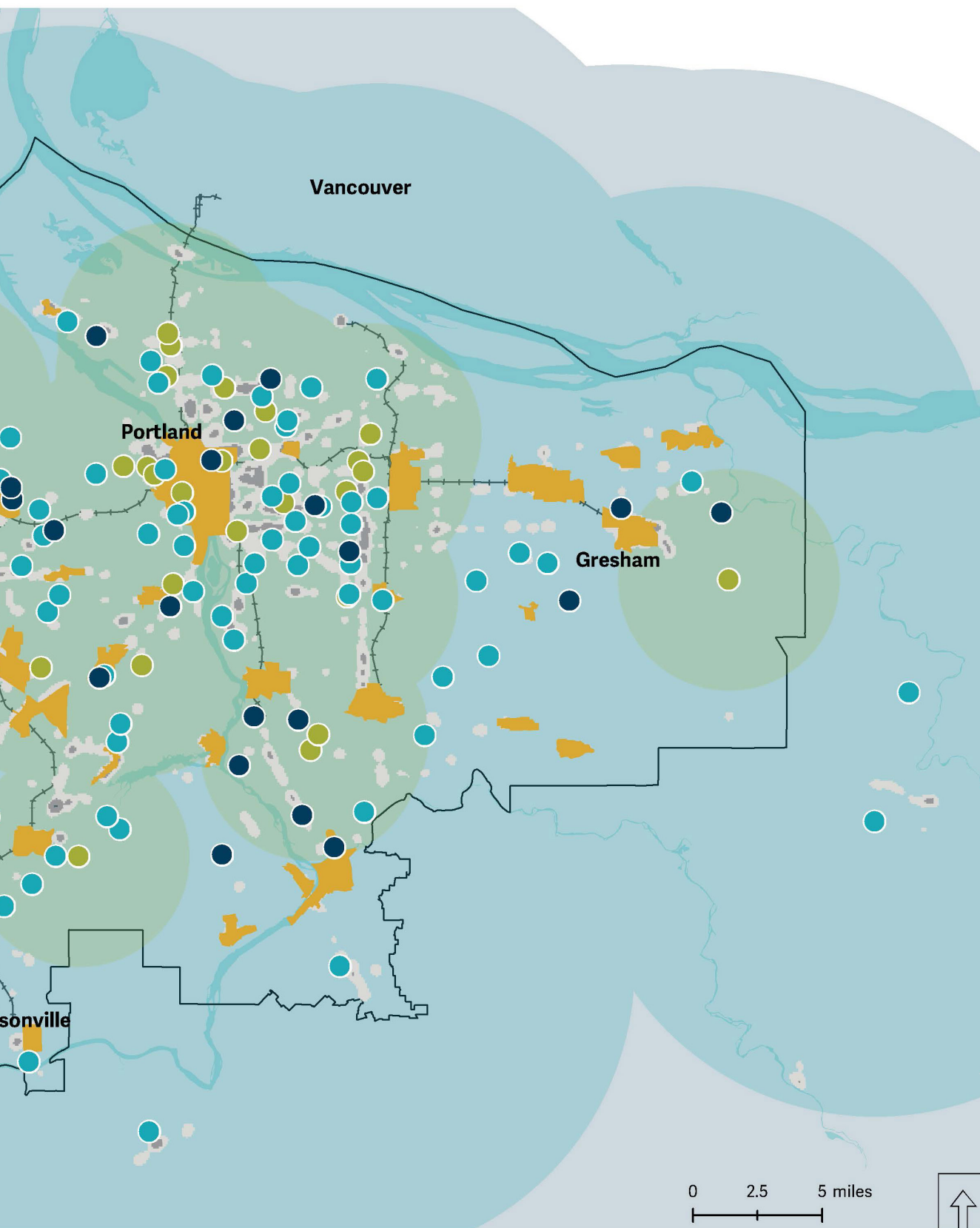


Figure 6: Home locations of respondents who used ridehailing services in the last year and answered an estimated average price of their rides. Buffer zones correspond to the estimated travel distance by miles. Buffer zones that overlap appear darker than the legend symbology, indicating an overlapping area of service from ridehail trips. Gold urban centers are composed of regional centers, town centers, and central city RLIS layers. See legend for further detail. The basemap includes Context Scores on urban living infrastructure, which is a geographic representation of the availability of urban amenities for the Metro region. Map: 2017 RTO Survey Data, RLIS, Metro Data Resource Center.

Ridehailing estimation

Using the reported average cost of ridehailing trips by respondents and home locations, it is possible to get a basic understanding of where users might be traveling by ridehail. Figure 6 shows the home locations of ridehail users, color-coded by their self-reported average cost of rides. A buffer zone around the user, matching the color of the average cost, estimates how far the respondent could travel in a ridehail car for that amount, assuming they traveled to or from their home location. A variety of Uber and Lyft trip estimates, which take into account mileage as well as minutes of travel, were used to estimate how far a respondent could travel for under \$10, up to \$20 dollars, and more than \$20. However, the cost of a trip can vary by time of day, price surging, navigation, and more. Buffer zones that overlap indicate areas where users are potentially traveling more often. These overlapping buffer zones also tend to correspond with the gold areas designated as urban centers, which have a higher density of urban amenities. Along with trip purpose data from this survey, the map shows that users tend to travel to or from leisure activities in urban centers. This aligns with the recent research from the various institutions, including the City of Portland, showing that ridehail use tends to occur in areas with a high density of restaurants, bars, and other leisure amenities, peaking Friday and Saturday nights.¹⁴

Carpooling

Seven percent of driving commuters described their trips as carpools (n=389). However, when asking a follow-up question about household carpools versus organized carpools, household carpools went down 6 percentage points from 2014. Because this question was reformulated as a follow-up, it is possible that respondents did not classify shared trips in the household as “carpool” trips and would not have been asked the follow-up. Therefore, more shared trips in the household are likely occurring that this survey does not capture. Questions may be added in the future to capture more data regarding shared household trips.

One in five residents have considered carpooling if they don’t already participate. Smartphone apps may prove promising for carpooling in the future. Employed or student residents show interest in an app that helps connect travelers with on-demand carpooling (such as Scoop) more so than interest in traditional carpooling (27% compared to 19%). Residents who say their commute is more difficult were slightly more open to carpooling (23%) than those who say their commute is the same or easier, although the difference was not significant. Those who are more likely to have considered carpooling include transit riders (31%) and residents interested in using travel options more (45%). Interest in an on-demand carpool app is higher among ridehail users (34%), carshare users (89%), residents in Washington County (36%), and residents interested in using travel options more (50%).

When asked which mode they would use if they hypothetically did not have access to a car, driving commuters are still likely to use public transit more than other options (Figure 7). Carpooling is also an option for many, with 18% choosing this option if they didn’t have their car for a day. Sixteen percent would take a taxi or ridehailing service. This response had a significant rise from 2014, but it is important to note that ridehailing was not an option in the Metro region at the time of the 2014 survey. Three percent said they would use a car sharing service, down from 6% in 2014. This information should be understood as a temporary choice and does not indicate that respondents would make these choices over the long term. This question was also not asked to those who did not choose driving as a primary mode. This may be an area for further research to examine how the choice may differ for those who rely solely on travel options.

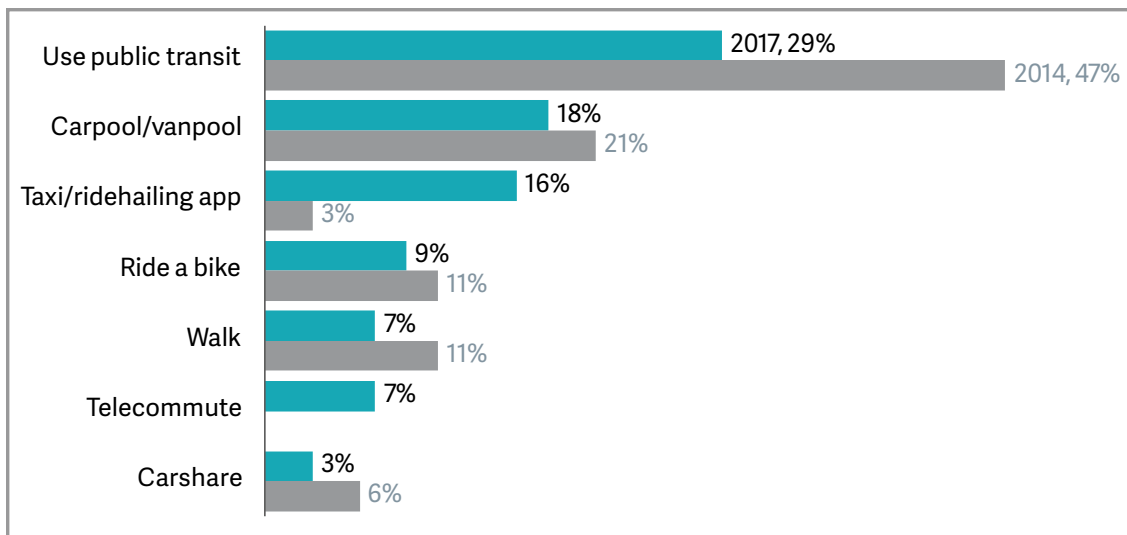


Figure 7: Results of Q19 (n=389), which asks "If you did not have access to a car and needed to get to (work/school), would you most likely..." Categories were randomized and respondents selected one answer. In 2017, four percent of respondents said they did not know which mode they would use instead and six percent reported they would use a different mode not listed. Percentages may add up to under or over 100 due to rounding.

Using Survey Results

RTO recommends using the survey results as insight into residents' preferences and behaviors, and as a starting point for future projects or research to support travel options. When combined with community partnerships and engagement, quality research can lead to more relevant projects and efficient outreach programs that meet the needs of communities. Looking forward, diversifying the types of research and projects conducted among partners will be crucial to capturing the needs and behaviors of all residents.

This survey measures travel options use and interest by capturing a large snapshot of residents in the region. This method helps identify regional trends and can be more cost-effective. However, as with any survey, there are limitations and potential for error. Respondents may overestimate, underestimate, or not feel comfortable giving accurate responses. Respondents may also believe they might behave in one manner, but choose differently in reality. Additionally, telephone surveys, while excellent at capturing large audiences, only capture those who are willing and able to participate. Residents without a telephone, the time, or the willingness to participate would be left out of the potential sample.

Conclusion

These results reveal a few important trends occurring in the Metro region. First, residents overwhelmingly choose to access travel information via smartphone apps and websites more than other information sources. It will be important to reach residents through those sources now and into the future. Additionally, ridehailing and carsharing services are modes that most residents use infrequently, relying more often on travel options or driving for their routine trips. Most importantly, services like BIKETOWN are seeing increased awareness. These types of investments play an important part in the lives of residents across the region.

Overall, the 2017 Travel & Awareness Survey shows that there are plenty of opportunities to increase travel options use, particularly through outreach and education. While technology can play a unique role in improving access and availability to travel options information, it is necessary to understand when technology may not serve everyone. For those who express interest in continuing to use travel options or those who want to use travel options more, RTO will continue to invest in diverse programs and create marketing that meets the needs of communities throughout the Metro region.

For more information

Whether you are on your way to work or school, to meet friends or go to the store, there are convenient and inexpensive ways to get there by walking, biking, taking transit, sharing a ride or sharing a car. To learn about travel options in your community, visit:

oregonmetro.gov/tools-living/getting-around

You can find additional research at: oregonmetro.gov/travel-options-research

What are your research needs? Contact us at:

rto@oregonmetro.gov or 503-797-1757.



Footnotes

1. Car-sharing in Portland: Driver's guide to options in a growing market. (2017). OregonLive.com. Available from http://www.oregonlive.com/commuting/index.ssf/2016/09/car-sharing_in_portland_driver.html
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- All images via Metro Transportation Planning & Development Flickr unless noted otherwise. Available from <https://www.flickr.com/photos/metrorto>



If you picnic at Blue Lake or take your kids to the Oregon Zoo, enjoy symphonies at the Schnitz or auto shows at the convention center, put out your trash or drive your car – we’ve already crossed paths.

So, hello. We’re Metro – nice to meet you.

In a metropolitan area as big as Portland, we can do a lot of things better together. Join us to help the region prepare for a happy, healthy future.

Metro Council President

Tom Hughes

Metro Councilors

Shirley Craddick, District 1

Betty Dominguez, District 2

Craig Dirksen, District 3

Kathryn Harrington, District 4

Sam Chase, District 5

Bob Stacey, District 6

Auditor

Brian Evans

