



Needs Assessment Report

Regional Transportation Demand
Management (TDM) Strategy

March 2025

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BACKGROUND

Metro's Regional Transportation Plan (RTP), adopted in 2023, provided new Transportation Demand Management (TDM) policy direction and identified the need for clearer guidance on how TDM should be implemented. The new RTP requires a greater commitment from the region's cities and counties to implement TDM activities, and recognizes the important role played by non-profit organizations and other partners in delivering TDM services.

The Regional Transportation Demand Management (TDM) Strategy being developed by Metro, with support from Alta Planning + Design's consultant team, will expand the scope of the previous Regional Travel Options (RTO) Program Strategy to implement new policies of the 2023 RTP. The Regional TDM Strategy will provide implementation guidance to local agency and non-profit partners and provide direction on how the Metro RTO program can identify and coordinate TDM activities that are meaningful and appropriate to the context of specific communities.

Metro's Regional TDM Strategy is being developed through two distinct project phases:

- **Phase 1: Assessment** – focused on assessing needs and opportunities for the Metro RTO program and regional TDM services.
- **Phase 2: Strategy Development** – focused on developing a Regional TDM Strategy, and an update to Metro's 2018 RTO Program Strategy in the form of an internally-oriented RTO work plan.

NEEDS ASSESSMENT PURPOSE AND METHODOLOGY

The purpose of the Regional TDM Strategy Needs Assessment is to elevate key themes across all Phase 1 assessment activities (completed between April 2024 and February 2025) and serve as a pivot point to move into Phase 2 of the project. The challenges and opportunities for TDM programs and services identified in this report will be carried forward into the development of the strategy.

The following Phase 1 activities informed the preparation of the Needs Assessment:

- **Materials review and background research**, which included three informational interviews with peer agencies and the development of a technical memo detailing best practices, challenges, and opportunities to address in the project.
- **Past engagement summary**: Past engagement materials associated with the 2023 RTP, RTO Racial Equity Strategy, and RTO Racial Equity Learning Cohort input were reviewed to identify key themes to consider in the Regional TDM Strategy development process.
- **2019-2023 RTO grant cycle evaluation**, which assessed the impact of the last RTO grant cycle and identified key takeaways and recommendations in a technical memo.

- **Regional TDM practitioners survey:** An online survey was conducted in Nov/Dec 2024 to gather information from TDM practitioners to address key questions surround TDM needs, gaps, and opportunities.
 - A separate survey was conducted by Metro to request input from local Transportation System Plan (TSP) leads on how Metro can support their planning work per updated RTP and state rules.
- **Focus groups:** The 2019-23 RTO grant evaluation identified key audiences to target for three focus groups, which were held in January 2025 and focused on identified gaps in TDM programming and better understanding barriers to accessing travel options. These focus groups included commute benefit providers from small, large and nonprofit employers; affordable housing resident service coordinators; and school-based service providers in Forest Grove where there is not currently a formal SRTS program.
- **Topic-specific research and recommendations:** The 2019-23 RTO grant evaluation identified two additional research activities, which were summarized in individual memos:
 - National best practices post-pandemic: TDM responses to changes including a shift to flexible work patterns and a rising need to focus on all trip types.
 - Measuring TDM strategy long-term impact, to inform how to measure and calculate – or estimate – the long-term impact of specific TDM interventions.

REGIONAL TDM STRATEGY NEEDS AND OPPORTUNITIES

Nine key themes were identified through the Needs Assessment process. Each theme includes a description of the nature of the challenge and/or opportunity followed by a list of recommendations for consideration in the Regional TDM Strategy.

1 | Expand Financial Incentives and Access to Transit Pass Programs

Transit pass programs and financial incentives are proven ways to increase transit ridership and improve access and mobility. However, in the Metro region transit pass programs can be challenging to administer, and new offerings and incentives are needed to expand access and encourage mode shift. Employers and higher education providers seek more flexibility in pass programs to serve a more diverse range of employees, including hybrid workers and day-passes for site staff for whom the cost of a Universal Pass is difficult to justify. Additionally, the administration of reduced fare programs by community-based groups has been challenging to meet resident’s needs and track usage. Lastly, as RTO aims to encompass an “all-trips approach,” there is a gap for residents who do not have access to commute benefit programs through their work or who may primarily travel for other needs. More broadly than transit passes, other incentive programs to improve access

to travel modes have also seen success in mode-shift, such as Transportation Wallet programming or 'earn a bike' programs.

The needs assessment identified the following opportunities to address this theme:

- Conduct a regional transit pass program and incentive study, which could include:
 - Establishing and promoting an expanded suite of employer transit pass programs, adapted to flexible work schedules (e.g., pay-what-you-use program).
 - Advancing programming for multi-family and affordable housing, including support for resident service providers administering Reduced Fare passes, improving ease of access for Reduced Fare riders to sign up, and piloting residential-focused pass packages at market rate multi-family housing.
 - Expansion of transit pass programming for youth.
 - Identifying and testing regional incentive programs to promote travel options use, building off existing local programs. Focus on expanding programs to cross jurisdictional boundaries, for ease of administration and brand recognition (i.e. Transportation Wallet). Explore different ways of distributing incentives depending on focus audience of the program.

2 | Enhance Regional TDM Coordination and Resources

Partners and service providers identified a need for consolidated information and customizable resources regarding travel options for their constituents. For example, service providers (such as a housing coordinator) are often unaware of the different travel options programs and services available, or of the specific organizations who have the capacity to provide them. Metro serves an important function as a regional convener and as such, RTO should play a stronger role in the coordination and consolidation of TDM information and resources. Consolidated and readily available information about TDM services and resources in the Metro region provides an opportunity for expanded travel options service use and partnership between community-based organizations (CBOs), employers, and travel options partners to meet the transportation needs of their constituents. This effort would limit redundant or overlapping efforts by TDM practitioners and establish a shared understanding of how specific TDM efforts can contribute to larger, regional successes.

The needs assessment identified the following opportunities to address these challenges:

- Use the RTO strategy to more clearly define Metro's role as a TDM convener responsible for consolidating information and resources and supporting collaboration between TDM practitioners regionwide.
- Develop centralized hubs for TDM information and resources relevant to resident, school, and employment audiences. Consider both the end user, as well as service

providers/program administrators when preparing resources. This can help reduce duplicative efforts, enhance program efficiency, and improve user experience/access.

- Improve communication between regional TDM service providers to ensure that partners know about available resources, as well as services offered by other partners in the region, that they can share with their constituents.
- Develop and support the delivery of a basic level of TDM services regionwide.
- Broaden the use of RTO's Commute Program CRM tool and employer database to be available to all partners engaging in employer outreach.
- Clearly define roles and responsibilities between Metro, local jurisdictions, and transportation service providers to better coordinate on TDM programs.

3 | Expand and Optimize Funding for Regional TDM Programs

Funding for TDM programs in the Metro region is limited and heavily reliant on a few key sources, restricting the ability to scale programs and adapt to evolving transportation needs. Metro faces ongoing challenges to develop impactful grant programs with limited funding at a time when travel patterns and needs continue to shift. As the RTO grant program becomes more competitive with the increase in partners and applications, the program must establish clear regional funding priorities to guide decision-making, as well as inform the allocation of resources for technical assistance and/or direct services provided by RTO and its partners. Finally, RTO's grant process can be complex, making it difficult for local jurisdictions and community organizations to access funding equitably.

The needs assessment identified the following opportunities to address this theme:

- Commit regional staff time to explore opportunities for diversifying TDM funding sources to maximize impact as well as identifying opportunities to pilot projects that advance regional TDM strategy goals and outcomes.
- Work with all TDM funders in the region to establish clear priorities & processes for funding criteria, reporting, and outcome measurement. Attempt to align priorities wherever possible and streamline reporting/data collection.
- Base RTO funding priorities on shared regional outcomes identified in TDM Strategy.
- Expand the portfolio of local/jurisdictional TDM funding for programs to guard against overreliance on a single source of funding and increase flexibility on eligible activities (e.g., taxes, fees, parking revenue).
- Improve access to Metro RTO funding by simplifying and consolidating the application process, using recommendations from the RTO Racial Equity Strategy.
- Deliver TDM services that are universally available in all parts of the region (e.g., ODOT's Get There program), while customizing to meet the needs of specific

communities. Use pilots as an opportunity to secure new funding and showcase program impact.

4 | Improve TDM Performance Measurement

The RTO program has traditionally relied on the collection of individual partner outputs to estimate the outcomes and benefits associated with TDM activities. However, measuring the impacts of specific TDM strategies remains a challenge for many organizations, including Metro and its grant program partners. Inconsistent metric tracking and disparate data sources, formats, methodologies, and assumptions are prevalent across TDM programs, preventing clarity of TDM's overall contribution to regional goals. Additionally, while short-term outputs are being captured, the long-term outcomes of TDM programs are not currently assessed, leaving a knowledge gap related to the impact of investments. The 2019-23 RTO grant program evaluation identified a need to simultaneously elevate priorities for TDM performance measurement region-wide, while simplifying and streamlining the data collection process for RTO partners.

The needs assessment identified the following opportunities to address this theme:

- Align TDM performance measurement with concurrent state and regional efforts to measure success related to transportation, climate and equity goals.
- Develop shared regional outcomes for practitioners and partners to measure success of TDM efforts.
 - Develop simple tools and mechanisms for RTO partners to report streamlined information that can support measurement of the program's impact towards these regional outcomes. Ensure outputs connect back to desired outcomes.
 - Consider progress towards regional outcomes when prioritizing resources.
- Improve employer data collection, standardization and coordination with state and regional partners. Improve data sharing agreements with transit agencies.
- Recognize the value of context-specific evaluation and qualitative information, particularly in the Community space, to better understanding the needs of specific user groups and the effectiveness of TDM strategies.
- Pilot methodologies and tools to estimate the impacts of resource distribution, as well as the long-term impacts of specific TDM strategies. Use pilot programs as opportunities to collect data that can be used to enhance measurement of regional outcomes.

5 | Address Safety and Security Concerns in the Public Realm

Public safety concerns onboard buses and trains have had an impact on transit ridership. Real and perceived threats to personal safety while traveling is impacting the public from utilizing travel options more broadly. Parents and caregivers have concerns that their children are not safe waiting for the bus or traveling by active modes to school. Fear associated with immigration status prevents some community members from engaging with community programming. Meanwhile, services like Emergency Ride home (ERH) are being overused by students at higher education institutions, citing safety reasons. Investing in community-led solutions and continuing to adapt programming to support community's unique needs will be a critical component of the Regional TDM Strategy.

The needs assessment identified the following opportunities to address this theme:

- Make explicit Metro's commitment to safety with an emphasis on racial equity and mitigating barriers for the region's underserved and most vulnerable communities.
- Pursue new initiatives with partners to expand TDM influence and involvement in addressing public safety and security concerns that are barriers to transportation options use. Work closely with culturally specific organizations to identify issues and implement solutions.
- Work with partners who provide critical safety and security measures for travel options (like transit agencies) to collaborate on solutions – i.e. lighting, more staff presence on trains, bystander intervention.
- Support more walking/rolling group programming to provide opportunities for community members to use travel options and learn how to travel new ways comfortably.

6 | Adapt TDM Strategies to Evolving Travel Patterns

The COVID-19 pandemic has profoundly disrupted traditional transportation patterns, exposing gaps in current TDM strategies. The rise of hybrid and remote work has reduced the predictability of daily commutes, while flexible work arrangements have driven an increase in diverse, non-commute trips such as errands, medical visits, and recreational activities. As employers implement return to work policies, vehicle congestion remains a concern in the region while transit ridership still lags below pre-pandemic levels. TDM practitioners are challenged to adjust programming to focus on all types of trips, supporting the needs of workers most likely to continue to have a daily commute (such as essential workers and shift workers), as well as effectively supporting travel options access to non-commute related opportunities – particularly for underserved or marginalized community members.

The needs assessment identified the following opportunities to address this theme:

- Direct programming to expand TDM investment to a broader range of trip types, locations outside of the urban core, and focused community audiences.
- Prioritize initiatives focused on a variety of work schedules – like shift or hybrid workers – to respond to changing commute travel patterns and workplace policies.
- Support commuter services such as vanpool or shuttles in areas with a high density of employers outside of the urban core, where travel options are not as accessible.
- Better define the RTO Community Program’s focus audiences or destinations and customize programming to meet their specific needs. Develop and prioritize programming that supports travelers and workers at major events and destinations, such as airports, concerts, sporting events, healthcare centers. Particular consideration should be given to destinations that are on the periphery of the region and/or destinations that are not well served by existing travel options.
- Prioritize supporting RTO Commute Program providers to deliver employer-based challenges/rewards and leverage current return to work trends to implement new programming.
- Expand Metro RTO efforts to address emerging trends like e-bikes with new tools, resources, and policy guidance.

7 | Strengthen Equitable & Effective TDM Program Delivery

Metro’s RTO program is committed to advancing programs that are effective at reducing vehicle trips, as well as advancing programs that provide equitable access to travel options throughout the region. Metro has made progress advancing these priorities through updates to the RTO grant program as well as the 2022 RTO Racial Equity Strategy, and the Regional TDM Strategy presents an opportunity for more defined support of these efforts. The Regional TDM Strategy will identify specific regional outcomes and a prioritized list of activities that advance both priorities. Opportunities to move the needle in these areas exist within grantmaking, developing capacity building resources for existing and new partners, and directly investing in priority programming where there are gaps. Through these efforts, Metro can play a role to ensure robust implementation of these activities.

The needs assessment identified the following opportunities to address this theme:

- Using regional outcomes that will be identified in the TDM Strategy, the RTO program should invest in technical assistance and direct services to advance implementation of proven TDM activities.
- Work with partners to implement RTO Racial Equity Strategy recommendations to build racial equity into existing programming and better define opportunities to invest in culturally specific organizations to deliver travel options programming.

- Invest in the critical work of building trust & community engagement.
 - Co-create programs and campaigns with culturally specific organizations and members of the community.
- Continue to iterate on RTO grantmaking structure to advance both travel options service delivery capacity and racial equity capacity.
- Collaborate with other TDM funders and local jurisdictions to elevate effective and equitable activities funded outside RTO and vice versa.

8 | Advance & Strengthen New & Existing TDM Policies

Existing TDM policies have unrealized potential to reduce SOV trips, and new TDM policies could serve to bolster the impact of TDM efforts. The impact of Oregon Department of Environmental Quality's (DEQ) Employee Commute Option (ECO) rule could be increased through stronger partnerships with employers or amplified by establishing regional or local Commute Trip Reduction (CTR) related policies. The new TDM-specific policies established in Chapter 3 of the 2023 RTP are a call to action for Metro and its partners to refine policy and implementation of TDM at the regional and local level. Additionally, the TDM element of the updated Regional Mobility Policy established in the 2023 RTP relies on local planning staff to effectively implement, but many lack experience or political support at the local level to implement TDM policy and programs.

The needs assessment identified the following opportunities to address this theme:

- Advance TDM policy at the local, regional and state level through coordinated efforts.
 - Support improvements to ECO Rules implementation and commute trip reduction (CTR) related policy efforts (e.g., regional/jurisdictional CTR rules that take ECO further).
 - Establish a TDM coordinating committee with representatives from all levels of government.
 - Support the consideration and development of local TDM Ordinances.
- Establish a system for Metro and the RTO program to support TDM in local transportation system planning (TSP) processes.
 - Create guidance and resources for jurisdictions regarding inclusion of TDM in local TSPs. Update and add resources in response to identified needs.
 - Facilitate connections between local jurisdiction planning staff and TDM practitioners who administer (or could administer) programs and services within the relevant jurisdiction.
 - Direct RTO funding to support local planning work and/or implementation of TDM projects identified in local plans.

9 | Align TDM Efforts with Complementary Transportation Strategies

The use of transportation options across the region is affected by many factors that are outside the purview of the Metro RTO program and Regional TDM Strategy. Complementary efforts can be leveraged by TDM program efforts, and it is strategic for the Regional TDM Strategy to identify ways to influence or coordinate with complementary efforts that are critical to the success of TDM. Complementary efforts include, but are not limited to, transit access, walk/bike infrastructure, parking policy, transportation system management and land use. For many local jurisdictions, some of these complementary strategies are included in the definition of TDM – like parking, pricing and development review. Of note, free and abundant parking was identified across needs assessment activities as a universal challenge to building demand and use of travel options.

The needs assessment identified the following complementary efforts for successful TDM implementation:

Transit Access/Service:

- Expanded transit options for underserved/rural areas and better integration across transit agencies.
- More frequent, reliable, and secure public transit.
- Investment in safe routes to transit for people walking and biking, including addressing route connectedness, and secure bike storage or parking at transit hubs.

Walk/Bike Access:

- Safe walking and biking infrastructure (sidewalks, bike lanes, crosswalks, traffic calming measures).
- School-specific safety improvements (crossing guards, speed zones, safer walking/rolling routes).
- Secure bike storage and bike network connectivity.

Land Use/Parking:

- Land use, and the location/density of housing and employment in a given context directly impacts the viability of travel options.
- Parking policy changes that reduce the availability of ample and free parking at a variety of locations, and that address the impacts on travel options use.

Other:

- Mobility hubs to integrate transportation modes.
- Shared micromobility and other emerging technologies.
- Cost and convenience issues, which were reported as barriers to using travel options by several community partners.

CONCLUSION

This needs assessment report memo elevates key findings across all evaluation and assessment activities for consideration and inclusion in the Regional TDM Strategy. While it serves as a starting point for strategy development, the opportunities and recommendations will be refined and enhanced through working groups, staff efforts, and additional research.

This report was developed by Metro's Regional Travel Options (RTO) team with support from a consultant team comprised of staff from Alta Planning + Design, Cascadia Partners & Nelson\Nygaard.