ACKNOWLEDGMENTS

Explore Washington Park (EWP) would like to acknowledge the EWP Board of Directors for their work in supporting our vision and goals:

Don Moore, Chair, Oregon Zoo
Anna Goldrich, Vice Chair, Hoyt Arboretum Friends
Dave Malcolm, Secretary, Sylvan Highlands Nbhd. Assoc.
Steve Cole, Treasurer, At-large member
Adena Long, Portland Parks & Recreation
Cynthia Haruyama, Portland Japanese Garden
Joe Furia, World Forestry Center
Kerry Ayres-Palanuk, TriMet
Ruth Shelly, Portland Children’s Museum
Tamara Kennedy-Hill, Travel Portland

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Danny Dunn, Operations Manager
Hannah Bogenreuther, Communications Specialist
Angela Linderman, Office Manager

PORTLAND PARKS & RECREATION STAFF

Victor Sanders, Program Coordinator
In 2014, PP&R installed a pay-to-park system in Washington Park. All revenue generated from the pay-to-park system is reinvested in and around the Park. This revenue has made this report possible.

EWP is a 501(c)3 non-profit that helps people make decisions about how they get to and around the Park, and ensures they have what they need for a fun, enjoyable visit.

We strive to improve the visitor experience at Washington Park in the following ways:

- By ensuring all visitors have a safe, smooth, and positive experience,
- By giving visitors access to better information and ways to get around the Park,
- By providing responsive customer support and guidance to our visitors.

**Methodology**

EWP conducts an annual intercept survey throughout the month of August in order to sample Washington Park visitors about their transportation behavior getting to, and around the Park. In all, 1,356 visitor surveys were collected. Trained staff completed these surveys during the first three weeks of August on Fridays and Saturdays from 10:00 am to 3:00 pm. This report is intended to provide a high level look at the transportation behavior and user experience of Washington Park visitors to help the EWP staff and board plan for future transportation needs and programs.

Surveys were conducted at the six major park institutions:

- Portland Children’s Museum
- Hoyt Arboretum
- Portland Japanese Garden
- International Rose Test Garden
- World Forestry Center
- Oregon Zoo

This is our 6th annual transportation survey, and while it represents a snapshot in time, it allows us to track changes over the past six years. EWP began these survey efforts in 2014 and continues to use the same survey methodology, developed with Portland State University, to track trends. The surveys seek to identify mode split of how people are traveling to Washington Park along with several other key indicators including:

- Where people are visiting from,
- The average number of people in each group and vehicle,
- Where people park,
- Washington Park free-shuttle use,
- Public transit use,
- Customer satisfaction information,
- Demographic information.
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VISITOR PROFILES

Who’s coming to the park?
PEAK SEASON VISITORS
June - August

1.3 Million

Gender:
- Male - 39.3%
- Female - 57.3%
- Other/Decline to answer - 3.4%

Race & Ethnicity:
- Caucasian - 71.2%
- Hispanic - 6.4%
- African American - 3.7%
- Pacific Islander - 1.4%
- Native American - 2.8%
- Asian - 11%
- Multiple Ethnicities - 3.5%

Regional Origin:
- U.S. - 32.9%
- OR & WA - 19%
- Portland Metro - 42.1%
- International - 6%
- International - 6%

Membership:
- Member - 18.4%
- Non-member - 81.6%

Visitor Profiles
VISITOR GROUP PROFILES

With over 3 million annual visitors, Washington Park is a major attraction for both local residents and tourists visiting domestically and internationally. The unique mixture of cultural institutions inside the Park brings a wide swath of people from different backgrounds, cultures, and demographics to Washington Park.

Presented here are five unique visitor profiles revealed through analysis of the survey data. Each of these groups – caretaker with children, large groups, Portland locals, couples or friends without children, and U.S. and international tourists - make up a significant portion of visitors at specific venues and tend to experience and interact with Washington Park in a unique set of ways.

CARETAKER + CHILDREN

- 14% of visitors
- Most visit the Park monthly
- Drive to the Park 19% more than the average Park visitor

LARGE FAMILY / FRIENDS GROUP

- 29% of visitors
- 73% are visiting with children
- Take transit 50% less than the average Park visitor
- Drive 16% more than the average park visitor

MOST VISITED VENUES

- Children’s Museum 65%
- Oregon Zoo 32%
- Oregon Zoo 46%
- Rose Garden 34%

38% are members of the Zoo
32% visit the Park monthly
Portland Metro Visitors

42%

Most Visited Venues

- Hoyt Arboretum: 52%
- Children’s Museum: 60%

- 38% are members of a venue
- 31% are between ages 18 – 34
- Drive to the Park 14% more than the average Park visitor

Couples / Friends (no kids)

33%

Most Visited Venues

- Rose Garden: 57%
- Japanese Garden: 50%

- 58% are first time visitors
- 38% of visitors without children are over 55 years old
- Visitors without children use ridesharing at more than twice the rate of the average Park visitor

US / International Tourists

38%

Most Visited Venues

- Rose Garden: 61%
- Japanese Garden: 56%

- 46% visit with children
- Twice as likely to take car share to the Park
- Drive to the Park 16% less than the average Park visitor
DESTINATIONS
Where are visitors going?
Attendance by Venue:

- World Forestry Center Discovery Museum - 0.6%
- Portland Children's Museum - 5.3%
- Oregon Zoo - 44%
- Hoyt Arboretum - 17.3%
- Portland Japanese Garden - 13.5%
- International Rose Test Garden - 19.2%

Who is in the Group?

- Groups with children: 3.2%
- Adults: 96.8%

Are they a Venue Member?

- Non-member: 71.6%
- Member: 28.4%

How Frequently do they Visit?

- First Time: 30.1%
- Infrequently*: 42.2%
- Frequently**: 27.7%

*Infrequent visitors are those that visit Washington Park less than once per month.
**Frequent visitors are those that visit Washington Park on a monthly, weekly, or daily basis.
**VISITOR DESTINATIONS**

Where are they Coming From?

<table>
<thead>
<tr>
<th>Destination</th>
<th>Portland</th>
<th>OR / WA</th>
<th>U.S.A</th>
<th>International</th>
</tr>
</thead>
<tbody>
<tr>
<td>Children's Museum</td>
<td>60.6%</td>
<td>18.2%</td>
<td>17.5%</td>
<td>3.6%</td>
</tr>
<tr>
<td>Oregon Zoo</td>
<td>47.3%</td>
<td>28.6%</td>
<td>20.8%</td>
<td>3.3%</td>
</tr>
<tr>
<td>Hoyt Arboretum</td>
<td>52.7%</td>
<td>8%</td>
<td>32.5%</td>
<td>6.8%</td>
</tr>
<tr>
<td>Japanese Garden</td>
<td>25.7%</td>
<td>11.1%</td>
<td>54.3%</td>
<td>8.9%</td>
</tr>
<tr>
<td>Rose Garden</td>
<td>26.4%</td>
<td>11.9%</td>
<td>51.5%</td>
<td>10.2%</td>
</tr>
<tr>
<td>World Forestry Center</td>
<td>46.3%</td>
<td>8.8%</td>
<td>35%</td>
<td>10%</td>
</tr>
</tbody>
</table>

Survey Respondent Age:

<table>
<thead>
<tr>
<th>Age Group</th>
<th>18-24</th>
<th>25-34</th>
<th>35-44</th>
<th>45-54</th>
<th>55-64</th>
<th>65+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Children's Museum</td>
<td>7.2%</td>
<td>30.8%</td>
<td>41.6%</td>
<td>8.6%</td>
<td>6.3%</td>
<td>5.5%</td>
</tr>
<tr>
<td>Oregon Zoo</td>
<td>5.8%</td>
<td>21.1%</td>
<td>32.9%</td>
<td>15.6%</td>
<td>11.8%</td>
<td>12.7%</td>
</tr>
<tr>
<td>Hoyt Arboretum</td>
<td>4.1%</td>
<td>27.3%</td>
<td>21.5%</td>
<td>16.9%</td>
<td>8.7%</td>
<td>21.5%</td>
</tr>
<tr>
<td>Japanese Garden</td>
<td>6.9%</td>
<td>22.6%</td>
<td>23.1%</td>
<td>15.5%</td>
<td>14.5%</td>
<td>17.5%</td>
</tr>
<tr>
<td>Rose Garden</td>
<td>7.3%</td>
<td>22.7%</td>
<td>21.8%</td>
<td>15.9%</td>
<td>16.5%</td>
<td>15.9%</td>
</tr>
<tr>
<td>World Forestry Center</td>
<td>7.4%</td>
<td>23.2%</td>
<td>28.6%</td>
<td>14.2%</td>
<td>12.5%</td>
<td>14.1%</td>
</tr>
</tbody>
</table>
60.3% of guests visit multiple institutions when coming to Washington Park. Cross venue attendance patterns show that specific cultural institutions have strong connections to one another. Nearly 43% of all Children’s Museum attendees visiting another institution choose to visit the Oregon Zoo, one of the strongest correlations among two such institutions.

Similarly, the Rose Garden and Portland Japanese Garden are very tied to one another, with about 60% of each institution’s attendees visiting the other. Hoyt Arboretum is also tied to the two gardens, with a combined 64% of Hoyt attendees also going to one of the two gardens. Two institutions that don’t show a strong cross venue correlation are the Oregon Zoo and World Forestry Center. Both institution’s visitors tend to visit other park institutions fairly equally, not showing a strong preference for any of the other institutions.
Modes
How did they get here?
Each institution exhibits unique mode-split patterns based on visitor demographics, visitor origins, and institution marketing. The Portland Japanese Garden and Rose Garden have the lowest automobile mode-split thanks to the prevalence of tourists, a higher percentage of adult only visitors, and messaging around transit options and the EWP shuttle. At the same time, they exhibit the highest car share mode-split, most likely due to the high proportion of tourists.
Transportation choices are heavily influenced by several key demographics, mainly: where visitors are coming from, whether children are part of the group, how often people visit the Park, and whether or not visitors are members of an institution.

People living in Oregon and Washington, but outside of the Portland Metro area, are much more likely to drive to Washington Park compared with visitors from the United States or abroad. Tourists are more likely to take transit, car share, or walk.

One of the biggest factors in determining the transportation mode to the Park is the presence of children. Groups with children are more likely to drive, and take transit compared with groups consisting of adults only.
Mode-Split Based Group Type:

Groups with Children (1-17 years old), Mode-Split:

- Adult only, Mode-Split:
  - 81.1%

- Non-Member Mode-Split:
  - 14.2%
  - 1.6%
  - 3.2%

- Member Mode-Split:
  - 20.5%
  - 8.5%
  - 13%

Parking Location of People Driving to Park:

- Metered Space: 78.8%
- Neighborhood: 13.1%
- Park & Ride: 1%
- Gravel Lot: 5%
- Overflow*: 6.3%
- Other: 2.5%
- Drop-off: .7%

*Survey took place on days Overflow Parking was in use.

- Transit: 66.7%
- Automobile: 18.2%
- Active: 5%
- Car share & Other: 10.1%
- Parking Location of People Driving to Park:

96% of people parking in overflow are Zoo guests.
91% of people parking on neighborhood streets are visiting the gardens or Hoyt Arboretum.
How did they get around the Park?
**INTRAPARK SHUTTLE AND OVERFLOW BUS**

**Boardings March – September:**

**127,274**

Interpark Shuttle

**42,427**

Overflow Bus

**People Using the Intra-Park Shuttle:**

- Yes - 27.2%
- No - 72.8%

**How Intra-Park Shuttle Riders Get to the Park:**

- 45.8% Car
- 40% Transit
- 3.8% Bike
- 10.4% Walk
- 0.5% Car share & Other

**Where Intra-Park Shuttle Riders Came From:**

- Portland Metro - 31.1%
- WA / OR - 12%
- United States of America - 48.2%
- Intl. - 8.8%

**Mode-Split Within the Park:**

- 61.8% Walk
- 20.1% Auto
- 17.2% Transit
- 0.5% Bike
- 0.4% Car share & Other

**MOVEMENT**
TRENDS
How are things changing?
### Mode Split to the Park 2014 - 2019:

<table>
<thead>
<tr>
<th>Year</th>
<th>Automobile</th>
<th>Transit</th>
<th>Active</th>
<th>Car share &amp; Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>66.5%</td>
<td>20.3%</td>
<td>4.2%</td>
<td>3.5%</td>
</tr>
<tr>
<td>2015</td>
<td>63.1%</td>
<td>17.6%</td>
<td>1.2%</td>
<td>0.8%</td>
</tr>
<tr>
<td>2016</td>
<td>61.5%</td>
<td>16.8%</td>
<td>0.9%</td>
<td>0.8%</td>
</tr>
<tr>
<td>2017</td>
<td>67.0%</td>
<td>17.3%</td>
<td>1.9%</td>
<td>4.2%</td>
</tr>
<tr>
<td>2018</td>
<td>77.0%</td>
<td>13.2%</td>
<td>1.9%</td>
<td>5.5%</td>
</tr>
<tr>
<td>2019</td>
<td>80.7%</td>
<td>70.4%</td>
<td>0.4%</td>
<td>8.5%</td>
</tr>
</tbody>
</table>

### Mode Split within the Park 2014 - 2019:

<table>
<thead>
<tr>
<th>Year</th>
<th>Automobile</th>
<th>Transit</th>
<th>Active</th>
<th>Car share &amp; Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>17.0%</td>
<td>45.9%</td>
<td>26.3%</td>
<td>25.2%</td>
</tr>
<tr>
<td>2015</td>
<td>20.1%</td>
<td>18.3%</td>
<td>23.6%</td>
<td>26.3%</td>
</tr>
<tr>
<td>2016</td>
<td>11.7%</td>
<td>21.9%</td>
<td>17.6%</td>
<td>20.3%</td>
</tr>
<tr>
<td>2017</td>
<td>17.6%</td>
<td>19.3%</td>
<td>21.9%</td>
<td>20.3%</td>
</tr>
<tr>
<td>2018</td>
<td>17.2%</td>
<td>19.3%</td>
<td>19.3%</td>
<td>20.3%</td>
</tr>
<tr>
<td>2019</td>
<td>20.1%</td>
<td>21.9%</td>
<td>19.3%</td>
<td>20.3%</td>
</tr>
</tbody>
</table>
Percent Change in Mode Split 2014 – 2019

- **Automobile**
  - Children’s Museum: 12%
  - Oregon Zoo: 11%
  - Hoyt Arboretum: 9%
  - Japanese Garden: 27%
  - Rose Garden: 22%
  - World Forestry Center: No Change

- **Transit**
  - 200%
  - 25%
  - 71%
  - 90%
  - 150%
  - 39%

**Parkwide attendance**: 25%
Several trends emerge when looking at six years’ worth of data. The percent of park guests visiting more than one institution increased by 64% since 2014. In general, the percent of frequent visitors has decreased, although 2019 shows a slight increase. This mirrors the trend for an increase in tourists vs local visitors.

**Frequency of Visits 2014 - 2019:**

- **First Time:**
  - 2014: 23.1%
  - 2015: 33.3%
  - 2016: 37.6%
  - 2017: 38%
  - 2018: 37.8%
  - 2019: 36.6%

- **Infrequent:**
  - 2014: 45.9%
  - 2015: 43%
  - 2016: 47.2%
  - 2017: 47.2%
  - 2018: 48.8%
  - 2019: 52.8%

- **Frequent:**
  - 2014: 15.3%
  - 2015: 18.4%
  - 2016: 21.3%
  - 2017: 18.4%
  - 2018: 10.6%
  - 2019: 15%

*Infrequent visitors are those that visit Washington Park on a few times per year or less. **Frequent visitors are those that visit Washington Park on a monthly, weekly, or daily basis.*
Between 2014 and 2019 peak seasons, attendance to the Zoo increased by 11%. The data suggests this can be attributed to increased transit ridership, as transit use increased 25% during the same period. Driving trips to the Zoo were less significant, with overflow bus passenger rides increasing by only 2% during the same period. Overall park attendance since 2014 is also up by 25%.
TRENDS

South End Average Purchase Hours:

- 2015: 3.0
- 2016: 3.1
- 2017: 3.1
- 2018: 2.8
- 2019: 2.8

North End Average Purchase Hours:

- 2015: 1.7
- 2016: 1.9
- 2017: 2.0
- 2018: 2.0
- 2019: 2.1

South End Attendance and Parking Transactions:

North End Attendance and Parking Transactions:
VISITOR EXPERIENCE & ATTITUDES

How are we serving our guests?
VI S I T O R  E X P E R I E N C E

Automobile Travel Experience Based on Parking Location:

<table>
<thead>
<tr>
<th>Parking Location</th>
<th>Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>Metered Space</td>
<td>4.29</td>
</tr>
<tr>
<td>Overflow Parking Lot</td>
<td>4.14</td>
</tr>
<tr>
<td>Gravel Lot</td>
<td>4.48</td>
</tr>
<tr>
<td>Park &amp; Ride</td>
<td>4.47</td>
</tr>
<tr>
<td>Neighborhood Street</td>
<td>4.19</td>
</tr>
</tbody>
</table>

Travel Experience by Mode to Washington Park:

<table>
<thead>
<tr>
<th>Mode</th>
<th>Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>Car</td>
<td>4.28</td>
</tr>
<tr>
<td>Bike</td>
<td>4.68</td>
</tr>
<tr>
<td>Pedestrian</td>
<td>4.66</td>
</tr>
<tr>
<td>Public Transportation</td>
<td>4.69</td>
</tr>
</tbody>
</table>

Intra-Park Shuttle Rider Rating:

- Average shuttle rating by riders: 4.2

Net Promoter Score:

- Parkwide average: 77.6%
36% of all park guests getting their information from Google Maps, making it an important pre-trip tool. Tourist are 60% more likely than locals to use Google Maps for pre-trip information. Visitors getting information from TriMet, Explore Washington Park or from tourist information providers are more likely to take transit, while visitors getting no pre-trip information are most likely to drive.

64% of visitors using Google Maps drive, suggesting this may be a good tool to use in the future to promote transportation options and parking information.

Tourist are **60% more** likely to use Google Maps for pre-trip information than the average park user.
During the 2019 peak season, Explore Washington Park had four customer service representatives. They helped over 45,000 guests at the Rose Garden, TriMet Plaza, Oregon Zoo Education Center, and overflow parking lots, and handed out over 15,000 maps.

Topics of conversations with customer service representatives:

- Free Shuttle/TriMet: 27%
- Hoyt/Trails: 11%
- Rose Garden: 35%
- Portland Japanese Garden: 11%
- Zoo, PCM, WFC: 8%
- Food/Restrooms: 6%
- Parking: 2%

Likelihood Visitors Driving Will Take Transit on Their Next Visit:

- Very Unlikely: 29.8%
- Somewhat Unlikely: 9.6%
- Neutral: 12.2%
- Somewhat Likely: 13.8%
- Very Likely: 34.7%
Annual Transportation Report 2019

Explore
WASHINGTON PARK