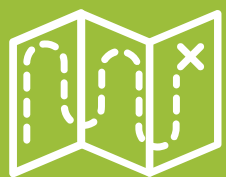


Annual Transportation Report

# WASHINGTON PARK 2021



*Explore*   
WASHINGTON PARK

# ACKNOWLEDGMENTS

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

Anna Goldrich – *Chair, Hoyt Arboretum Friends*  
Cynthia Haruyama – *Vice Chair, Portland Japanese Garden*  
Dave Malcolm – *Secretary, Sylvan Highlands Neighborhood Association*  
Steve Cole – *Treasurer, at-large member*  
Adena Long – *Portland Parks & Recreation*  
Billie Moser – *Travel Portland*  
JC Vannatta – *TriMet*  
Joe Furia – *World Forestry Center*  
Kathy Goeddel – *Arlington Heights Neighborhood Association*  
Heidi Rahn – *Oregon Zoo*



## EXPLORE WASHINGTON PARK STAFF

Keith Baich – *Senior Programs Manager*  
LeiLani Barney – *Senior Communications Manager*  
Dana Garrett – *Office Manager*  
Rachel Gorban – *Digital Marketing Specialist*  
Heather McCarey – *Executive Director*  
Todd Moore – *Visitor Service Specialist*



Explore Washington Park is a 501(c)3 non-profit dedicated to connecting people with the culture, diversity, and wonder of nature in Washington Park in Portland, Oregon.

Our mission is to provide an accessible, inclusive, and cohesive experience for all who visit Portland’s destination park. We are guided by the following principles:

- We are caretakers of the natural world.
- We eliminate barriers that exclude.
- We are stewards of exploration.
- We embody the nature of Portland.
- We are One Park – a community of destinations.

The organization was established in 2014 and is primarily funded through Washington Park’s parking meter revenue in partnership with Portland Parks & Recreation. 100% of parking proceeds stay in the Park and make this report possible.

### Methodology

2021 marks the 8th year of the annual intercept survey. EWP has conducted it each year since developing the survey in conjunction with Portland State University in 2014. To facilitate data-comparison opportunities year-over-year, the bulk of the survey questions have remained unchanged since the first season. The survey is carried out throughout the month of August. Its questions focus on revealing the transportation-related decisions, behaviors, and attitudes of visitors, and on collecting demographic information.

This year, EWP staff collected 1,221 visitor surveys in the Park on Fridays and Saturdays between 10 a.m. to 3 p.m. Surveys were collected at high-traffic points at the following four locations:

- Hoyt Arboretum
- Portland Japanese Garden
- International Rose Test Garden
- Oregon Zoo

The methodology included the opportunity for participants to scan a QR code and participate on their own device, instead of on the hand-held device—or paper copy—provided by EWP staff.

Margin of error: A confidence interval calculated for surveying instruments equaled +/- 2%. An interval of +/- 1.5% was calculated for the two estimates found in the results (Hoyt Arboretum and International Rose Test Garden peak season attendance) by conducting modeling that cross-referenced three distinct data sets.

The World Forestry Center Discovery Museum remained temporarily closed, for a second year, due to COVID-19. The WFC, however, hosted events on its campus in 2021 and attendee data is reflected in this report. The Portland Children’s Museum permanently closed in June 2021, after shutting its doors to the public in 2020, and was not included in this year’s survey.

# EXECUTIVE SUMMARY

Explore Washington Park’s annual survey, completed since 2014, provides the Park with a wealth of information, revealing the transportation-related decisions, behaviors, and attitudes of Washington Park visitors during peak season (June–August). Specific categories include:

- Visitor makeup, including demographics
- Visitor origin and destination
- Travel to and around the Park
- Visitor satisfaction

COVID-19 continued to have a significant impact on Washington Park in 2021. The Portland Children’s Museum permanently closed, and the World Forestry Discovery Museum remained temporarily closed. Despite these closures, the survey revealed a significant increase in parkwide attendance over 2020 numbers, and a return to many trends typical in previous years.

This summary provides a few key takeaways from this year’s survey effort.

## Who is coming to the Park?

- 2021 parkwide attendance was at 65% of 2019 levels.
- 2021 saw a shift in visitor origin. Domestic tourists (regional, U.S.) accounted for a greater percentage of visitors than before.
- 35% of visitors identify as tourists who are staying the night in the Portland area.
  - » This highlights Washington Park’s economic impact on the region.
- Percent of Caretakers + Children coming to the Park decreased significantly, mainly due to the Portland Children’s Museum’s closure.
  - » This provides a programming opportunity for the Park.

## How are they traveling?

- Percentage of visitors who drove to the Park in 2021 was 8.4% higher than in 2019.
- Percentage of transit ridership to the Park in 2021 was 7.7% lower than in 2019.
- Washington Park Free Shuttle ridership in 2021 was at 50% 2019 levels. This is similar to TriMet’s reported ridership which was less than 50% of pre-pandemic levels for 2021. The slow recovery in ridership is likely due to:
  - » Decrease in international tourists who are more likely to take transit and the Free Shuttle.
  - » Continued COVID-19 hesitations around enclosed indoor spaces, including transit.

- Offsite parking lots were rarely required in 2021 due to a lack of parking demand. 303 people used offsite parking in 2021 compared to 21,000 in 2019. Contributing factors include:
  - » Timed ticketing at the Oregon Zoo and Portland Japanese Garden effectively spread arrival times throughout the day, maximizing parking availability.
  - » Portland Children’s Museum closure and continued closure of the World Forestry Center Discovery Museum lessened parking demand in the south lots.

## Where are they going?

- 44% of peak season visitors went to the Oregon Zoo.
- 57% of visitors went to more than one cultural institution in 2021 compared to 31% when we started surveying in 2014. This shows an increase in the holistic use of the Park.
- Portland Japanese Garden and International Rose Test Garden have a higher number of first time visitors, as well as domestic tourists, compared to other Park locations.

## How was their experience?

- Washington Park Net Promoter Score (NPS) was 73 in 2021.
  - » It’s considered a high score in any industry, and means use of the Park is augmented by positive word-of-mouth referrals.
  - » Park’s NPS has remained consistently in the “Excellent” range (70-100) for a number of years, even through 2020 closures and other limitations.
- Washington Park Free Shuttle rating (based in a 5-star format) in 2021 received 4.4 stars.
  - » Up from 2020’s 3.9 star rating, which was related to COVID-19 service disruptions.
  - » Pre-pandemic, the Free Shuttle rating was consistently in the 4.5 star range.



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## VISITOR EXPERIENCE & ATTITUDES

*How are we serving our visitors?*

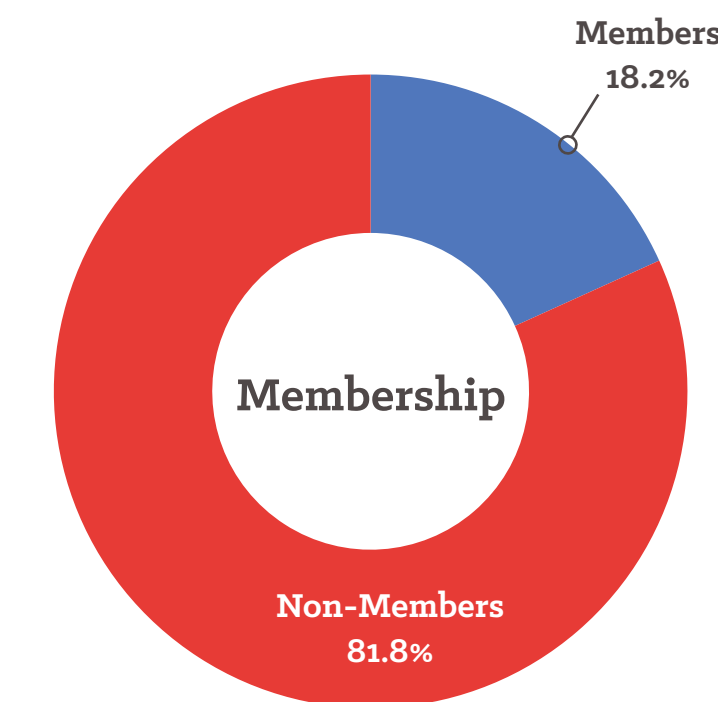
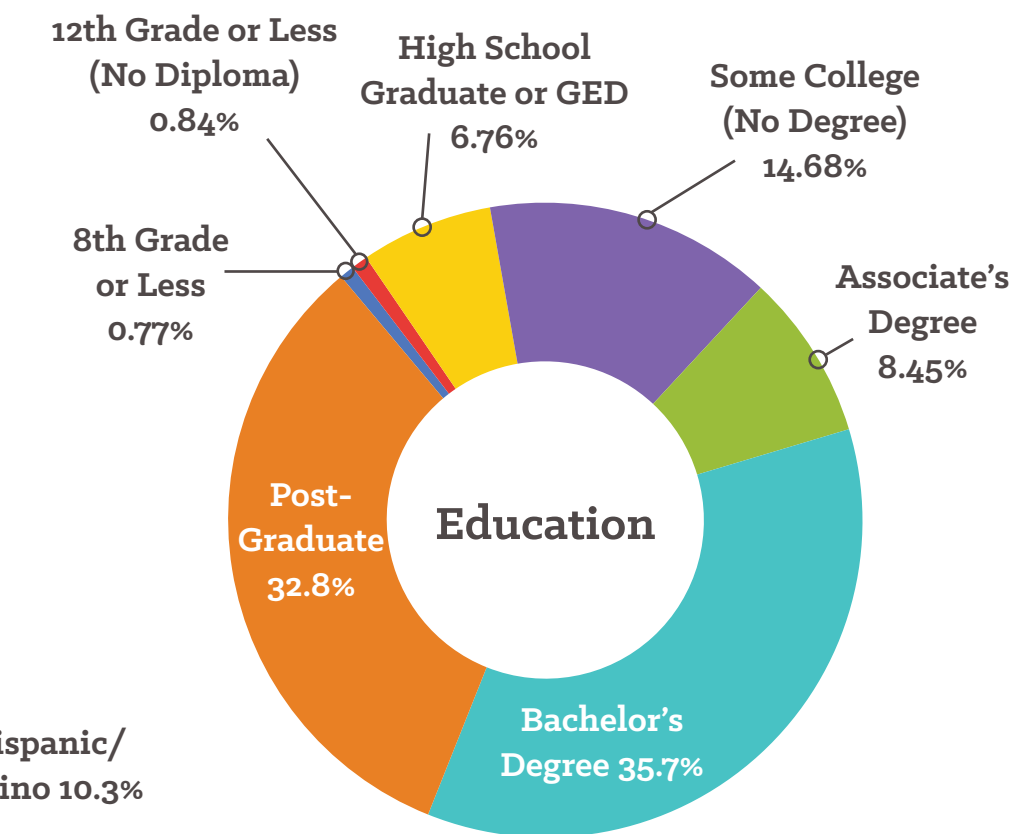
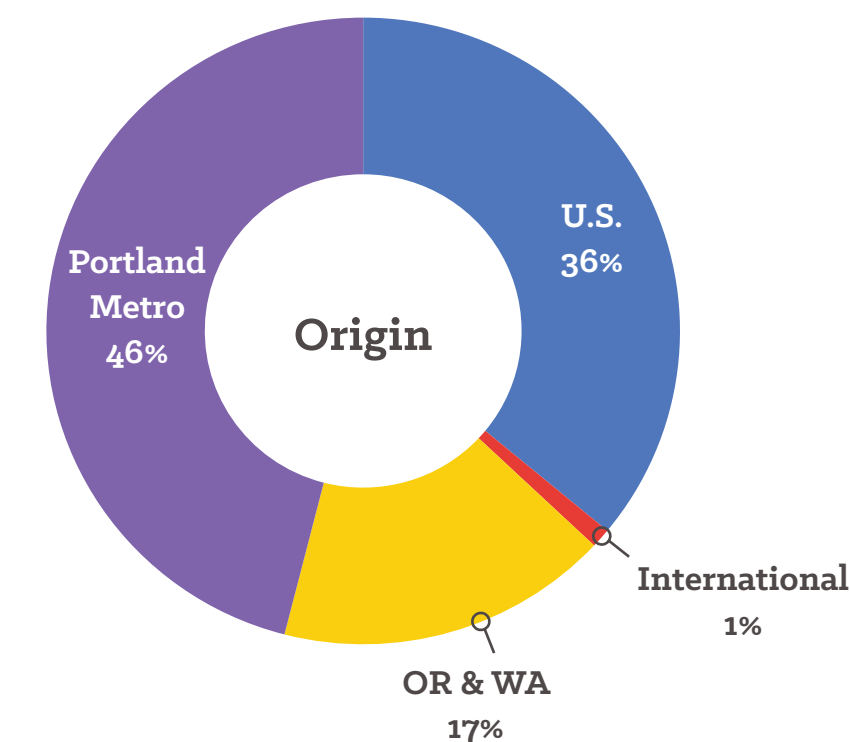
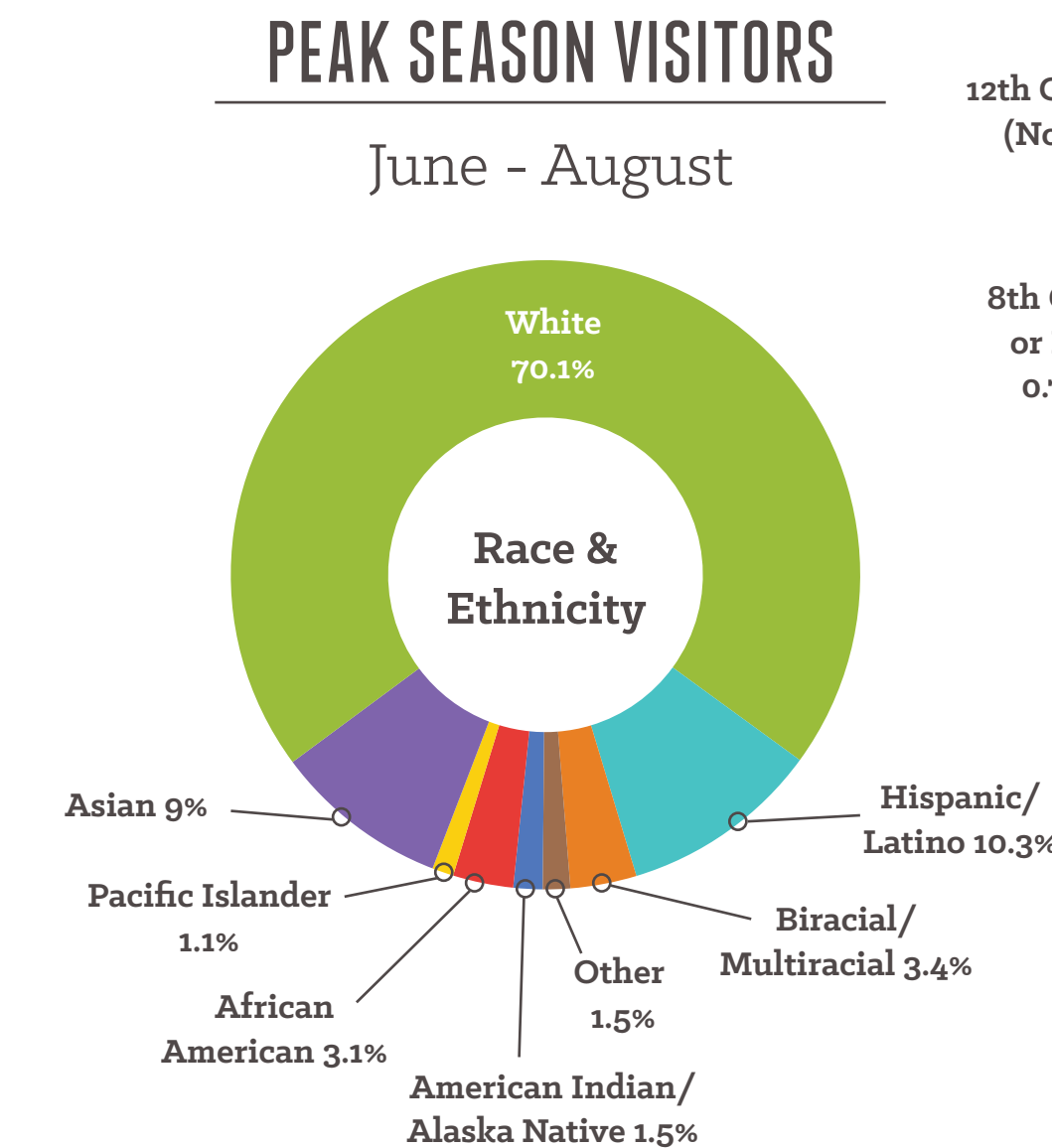
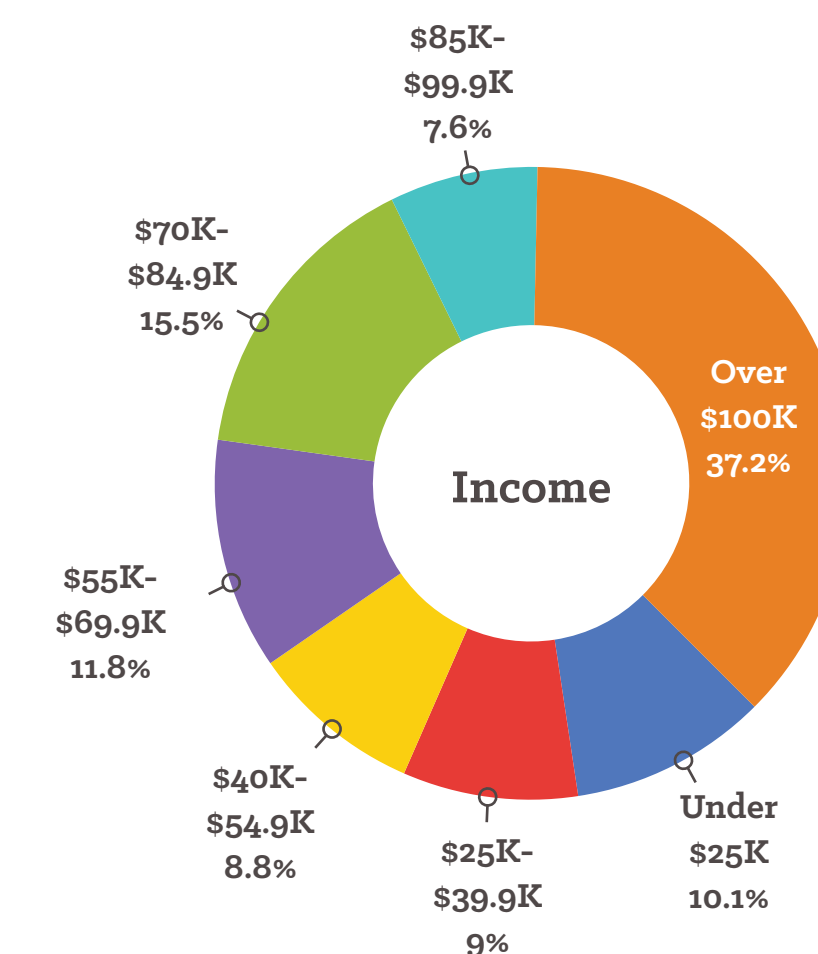
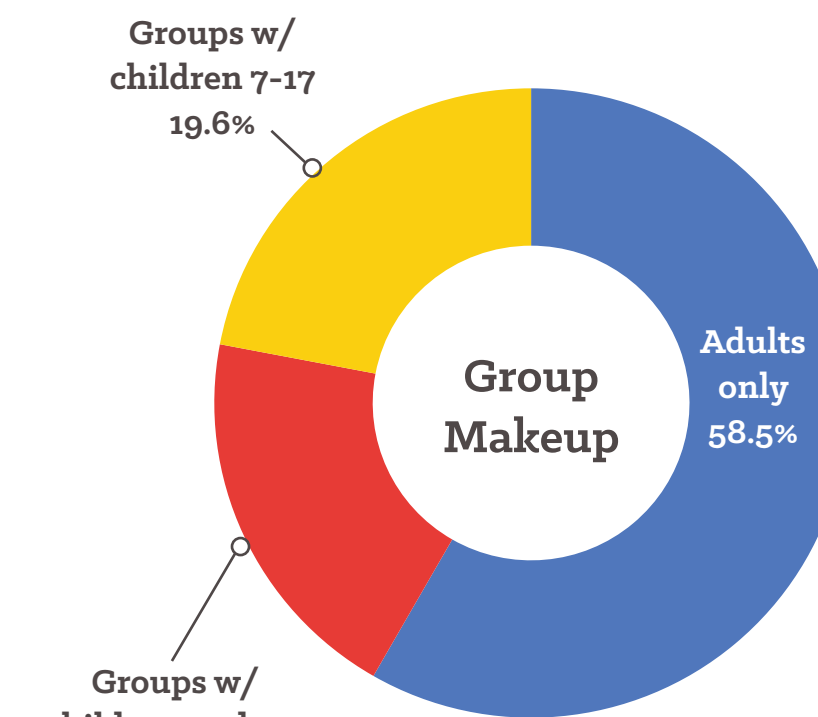






# VISITOR PROFILES

Who's coming to the Park?



## VISITOR PROFILES





## VISITOR PROFILES

### VISITOR GROUP PROFILES

An analysis of survey data revealed five unique Washington Park visitor profiles. Many of the profile percentages are unchanged or very similar to percentages from the last pre-COVID year (2019), with two exceptions:

- Caretaker + Children dropped significantly from 14% of groups in 2019 down to 6% in 2021.
- The 2021 survey reflects the first time EWP reported specifically on Park tourists who stayed overnight in the Portland area. These tourists made up more than a third (35%) of peak season attendance.

The decrease in participation of Caretaker + Children can likely be traced to the closing of the Portland Children’s Museum prior to 2021 peak season. The significant number of Park tourists staying in Portland area hotels reinforces increases in regional and national (though, not international) travel found elsewhere in this report.

#### PORTLAND METRO VISITORS



##### MOST VISITED VENUES



34.1%

*Hoyt Arboretum*



32.1%

*Oregon Zoo*

#### TOURISTS STAYING OVERNIGHT



##### MOST VISITED VENUES



59%

*Japanese Garden*



58%

*Rose Garden*

#### CARETAKER + CHILDREN



##### MOST VISITED VENUES



34.8%

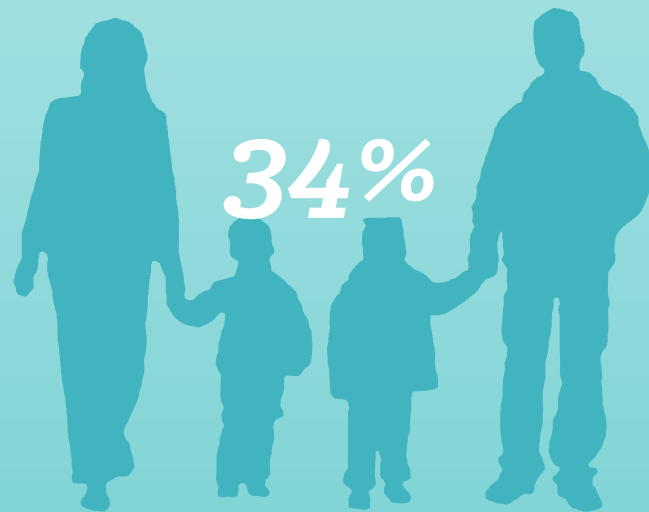
*Oregon Zoo*



23.2%

*Hoyt Arboretum*

#### LARGE FAMILY / FRIENDS GROUP



##### MOST VISITED VENUES



34.6%

*Japanese Garden*



31.7%

*Rose Garden*

#### COUPLES / FRIENDS (NO KIDS)



##### MOST VISITED VENUES



46.2%

*Rose Garden*



45.2%

*Japanese Garden*



## VISITOR PROFILES

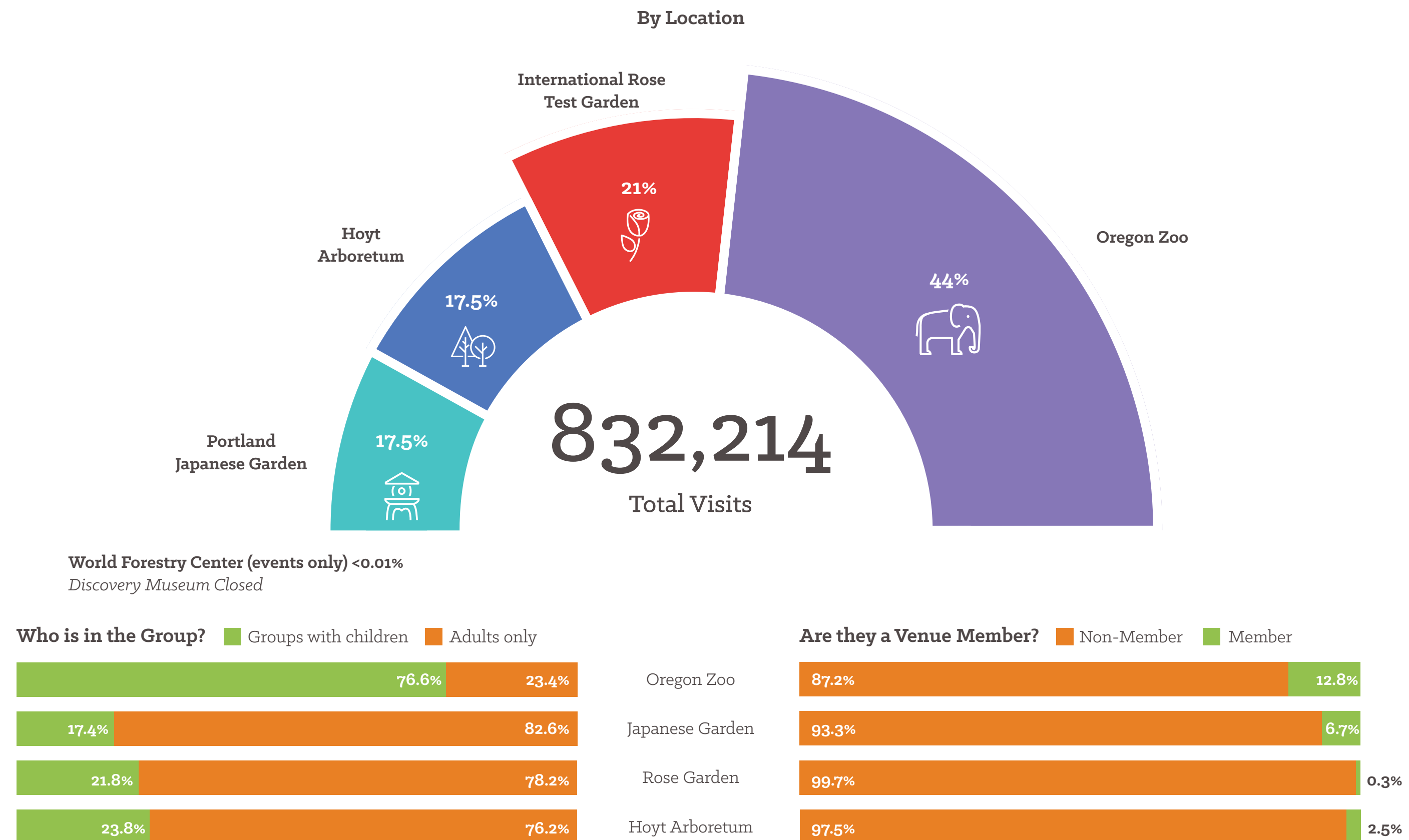


## DESTINATIONS

Where are visitors going?



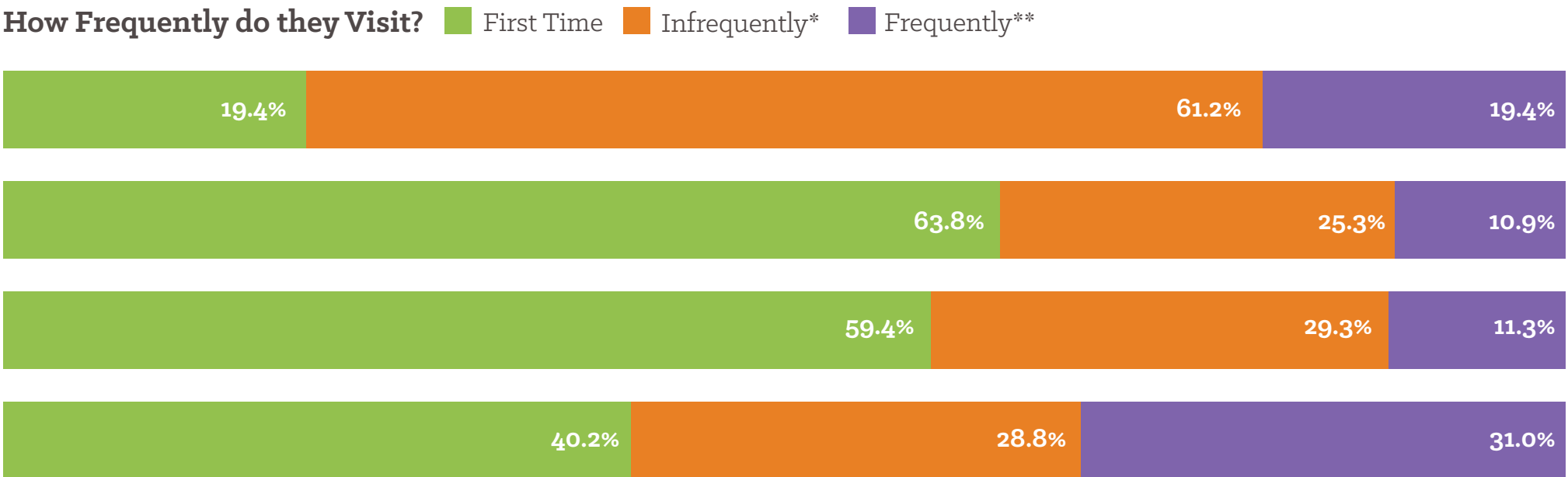
## PEAK SEASON ATTENDANCE



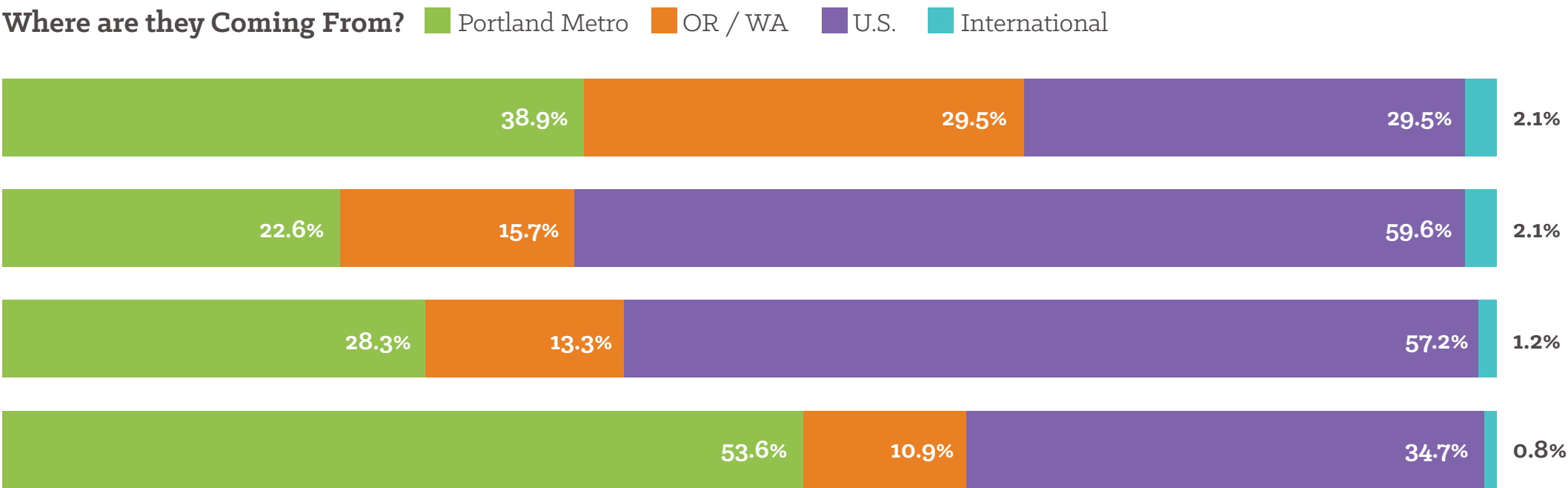
DESTINATIONS



# VISITOR ORIGINS

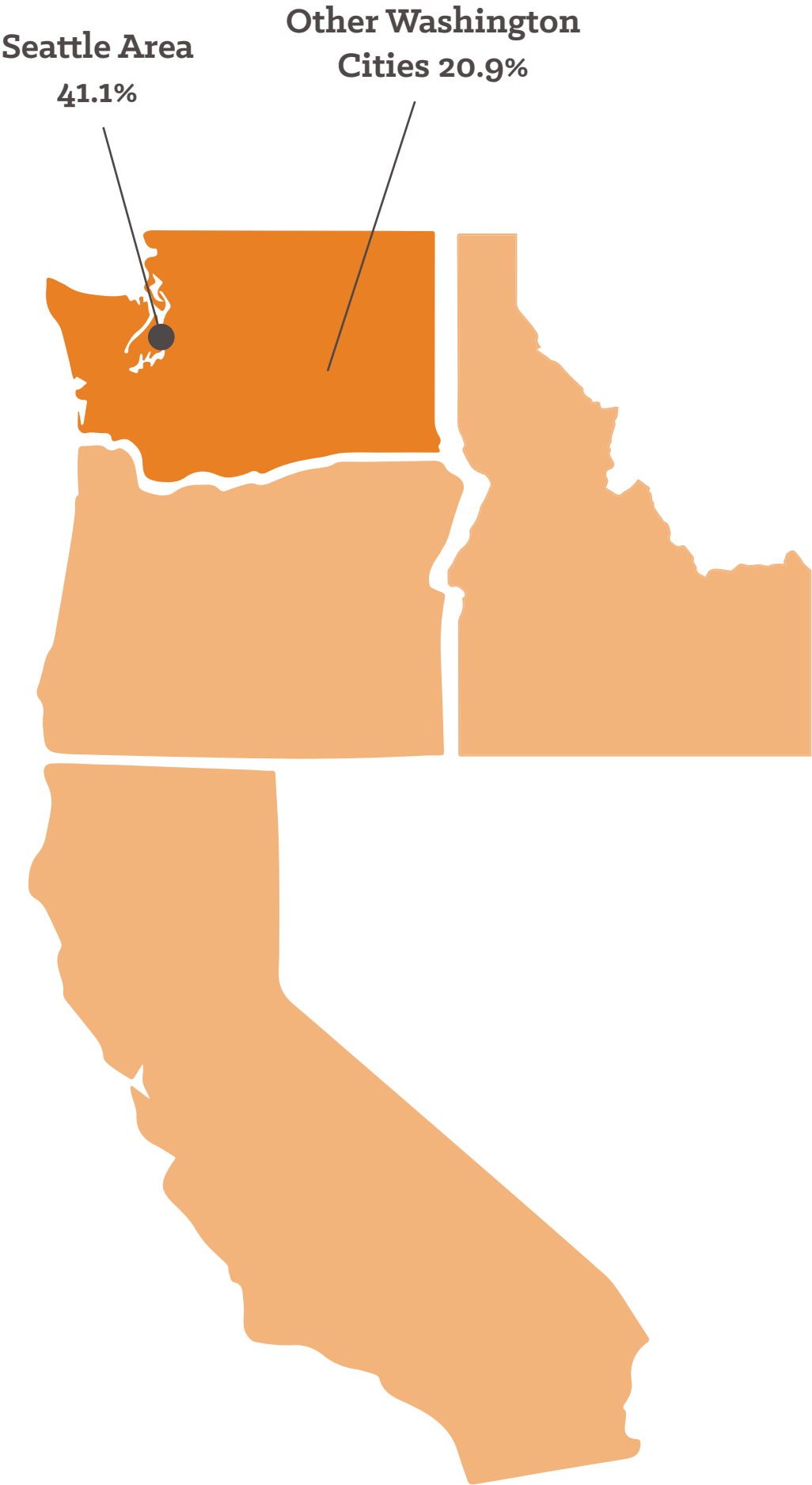


*\*Infrequent visitors are those who visit less than once per month.  
\*\*Frequent visitors are those who visit on a monthly, weekly, or daily basis.*



The previous chart (pg 7) reveals a steady stream of regional (Oregon and Washington) tourism and increased national (U.S.) tourism over pre-COVID 2019 numbers.

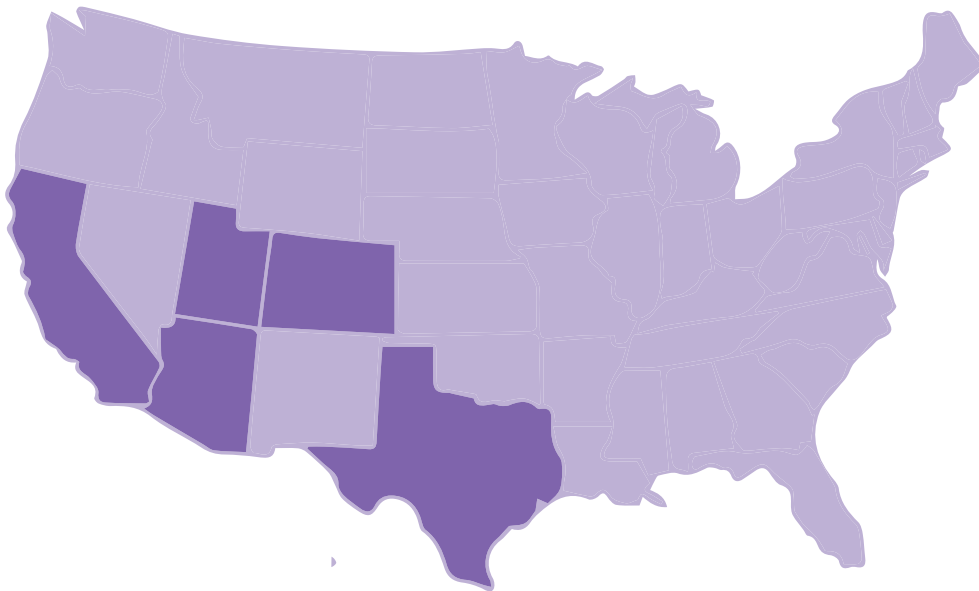
We see that the bulk (+40%) of Oregon (non-Portland) and Washington travel, comes from the Seattle area, with the second most significant group coming from other Washington cities (Spokane, Tacoma, Yakima, Olympia).



With international vacation options hampered in 2021 by COVID-19 considerations, the biggest jump in a specific tourist demographic visiting the Park was the increase in “U.S. tourists” (pg 7). A large percentage of that group came from metropolitan cities in the Western United States.

The top non-regional, national travelers (U.S.) came from the following six cities:

- 1. Los Angeles Area 7.7%
- 2. Salt Lake City 7.2%
- 3. Phoenix 6.8%
- 4. San Francisco/Oakland 6.2%
- 5. Denver 3.7%
- 6. Dallas/Fort Worth 3.3%



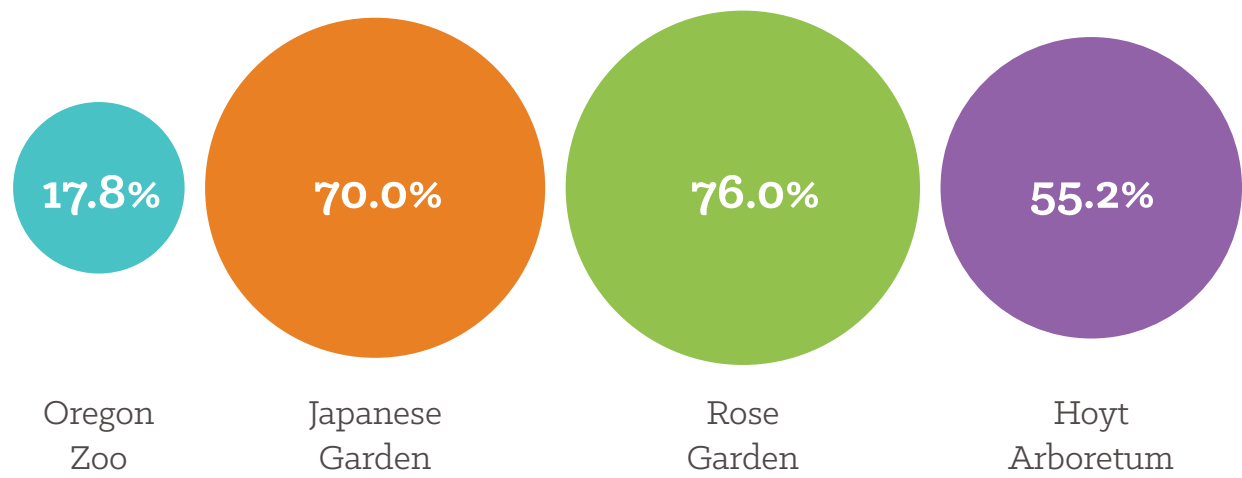




DESTINATIONS

# CROSS VENUE ATTENDANCE

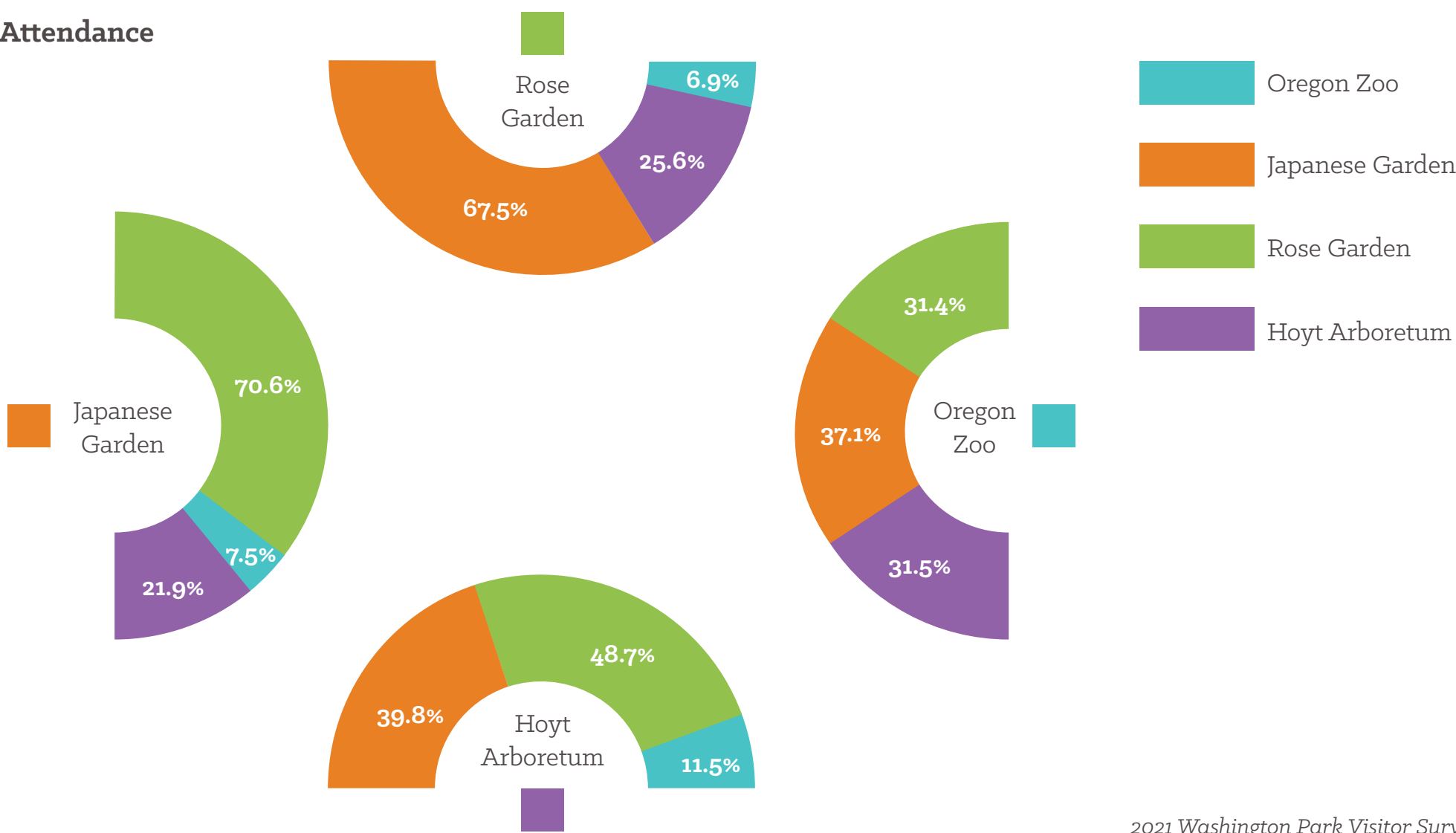
Percent of Park Visitors Visiting Multiple Locations



**57.1%**  
of all Park visitors  
visit multiple venues

Primary Destination Cross Venue Attendance

- There is a strong correlation between those who visit the Japanese Garden and the Rose Garden.
- Hoyt Arboretum visitors are likely to visit the Rose Garden and Japanese Garden as well.







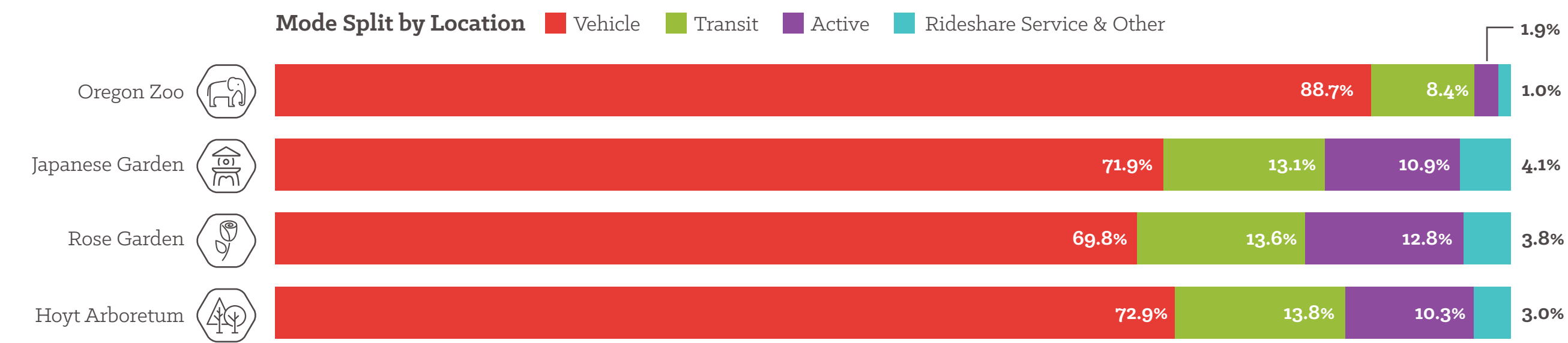
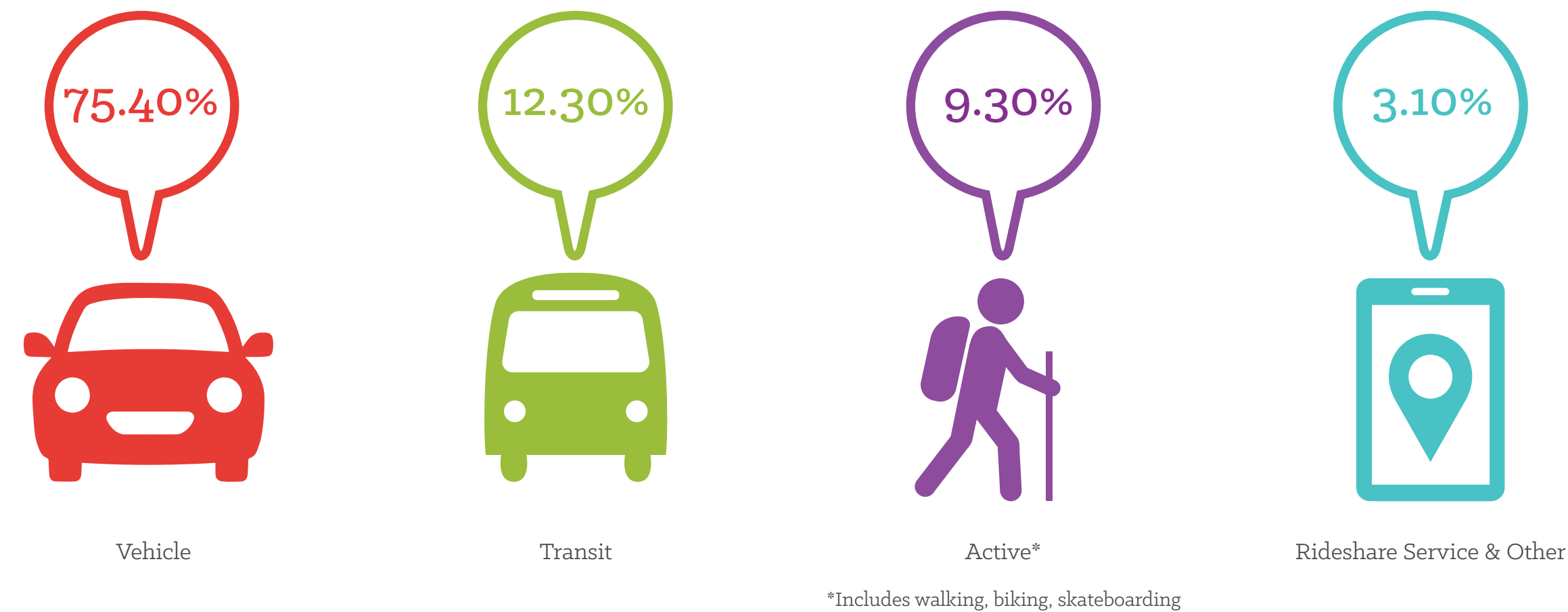
# MODES

How did they get here?



## VISITOR MODE SPLITS

Parkwide Mode Split









# MODES

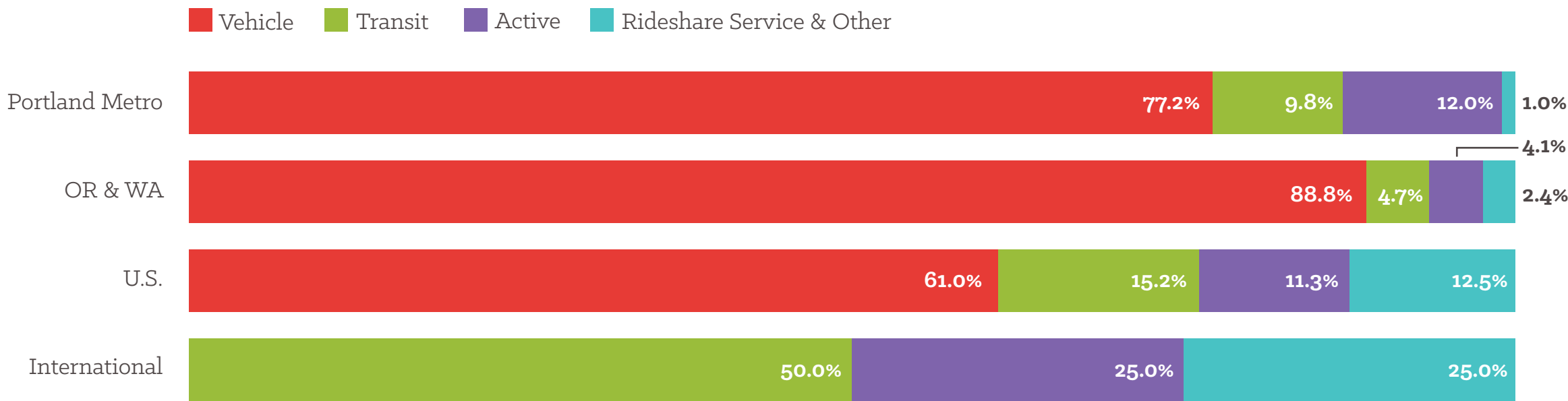


### MODE SPLIT DETAILS

Passengers per Private Vehicle

	Oregon Zoo	2.72
	Japanese Garden	3.69
	Rose Garden	3.54
	Hoyt Arboretum	4.08

Mode Split Based on Where they are Coming From



Mode Split Based Group Type



Vehicle



Transit



Active



Rideshare Service & Other

Adult Only



Groups with Children (1-17 years old)



Member



Non-Member







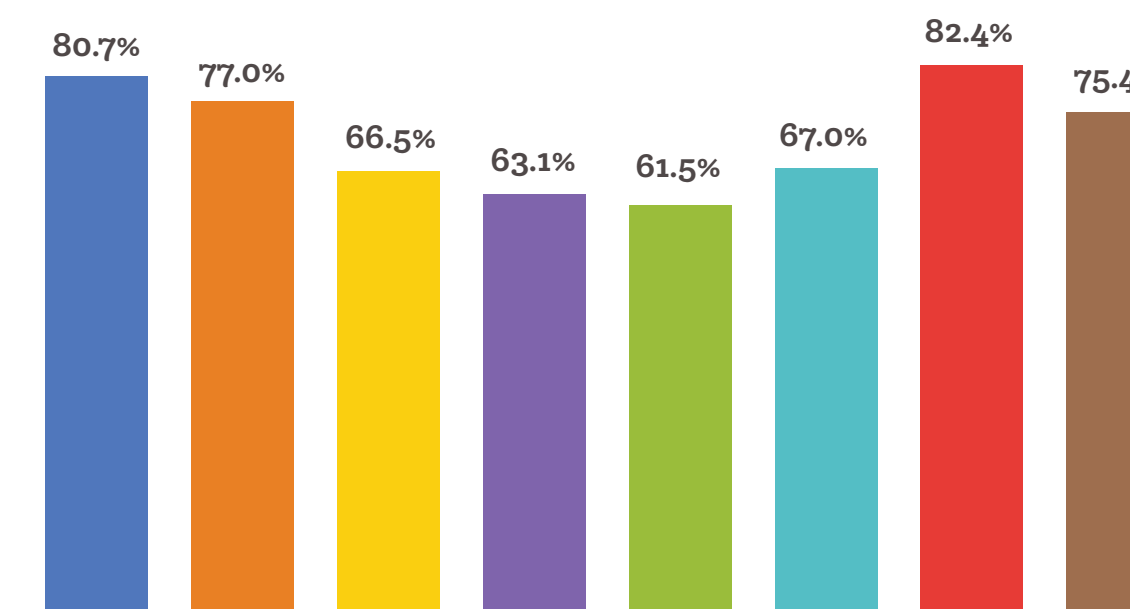
## TRENDS

*How are things changing?*

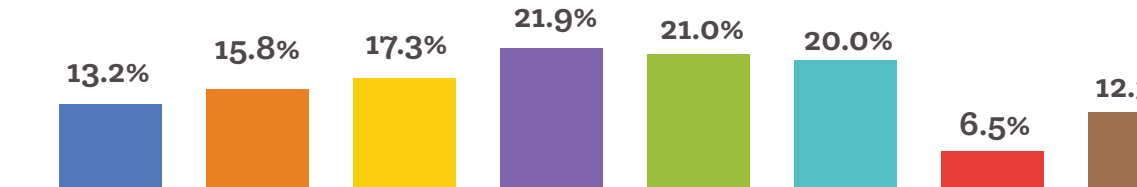
### HOW VISITORS ARE GETTING TO THE PARK



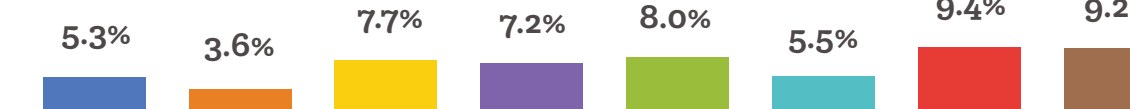
Vehicle



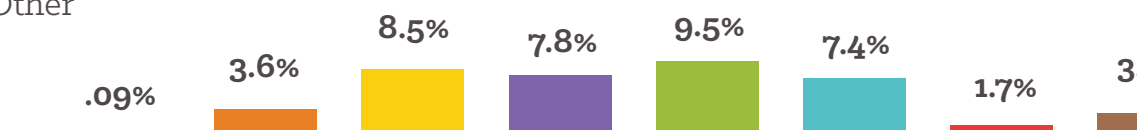
Transit



Active



Rideshare Service  
& Other



## TRENDS



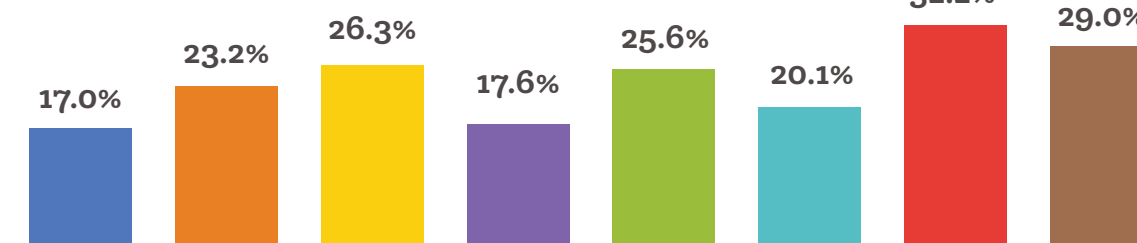


## TRENDS

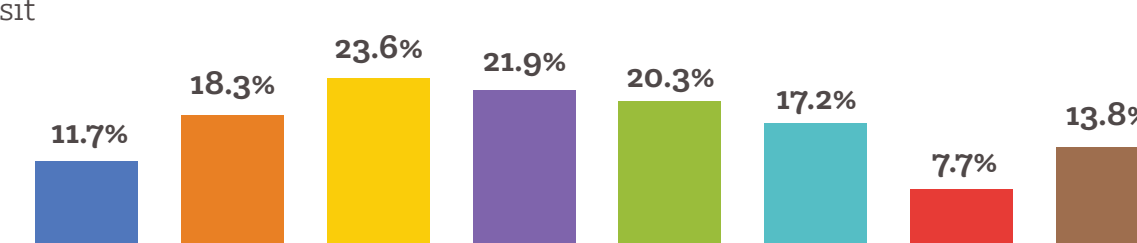
### HOW VISITORS ARE GETTING AROUND THE PARK



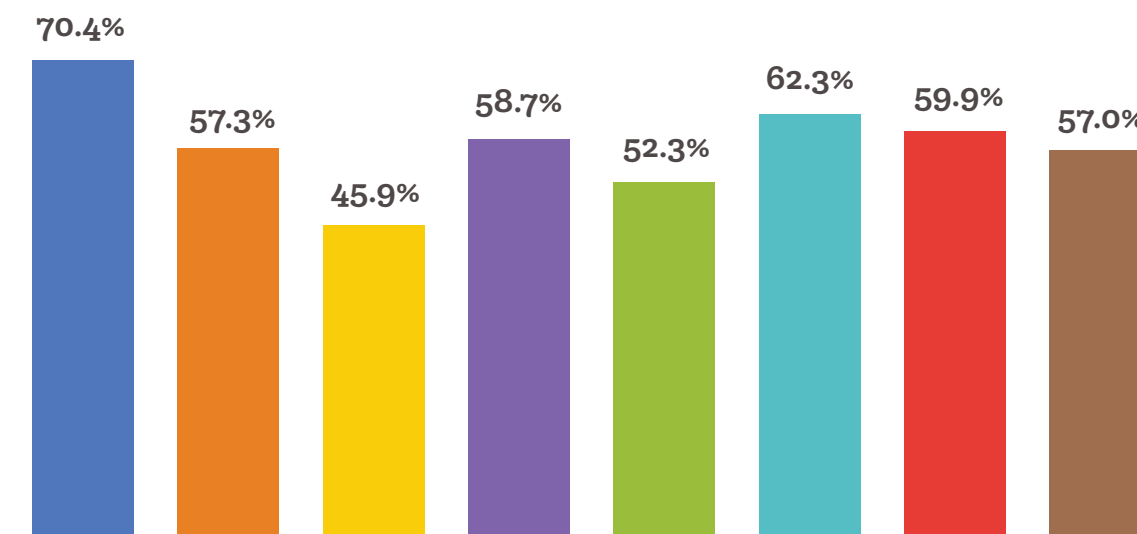
Vehicle



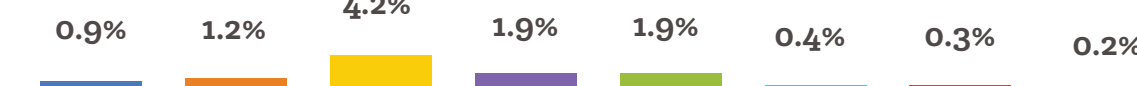
Transit



Active

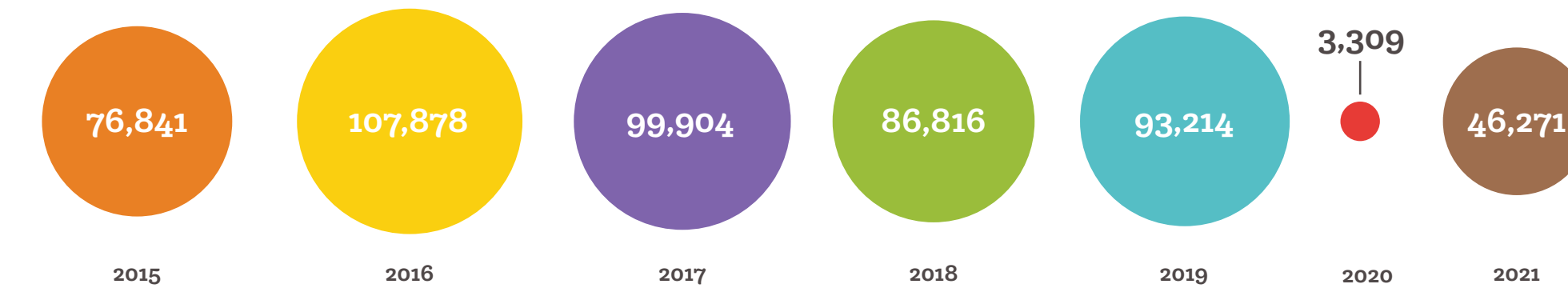


Rideshare Service  
& Other

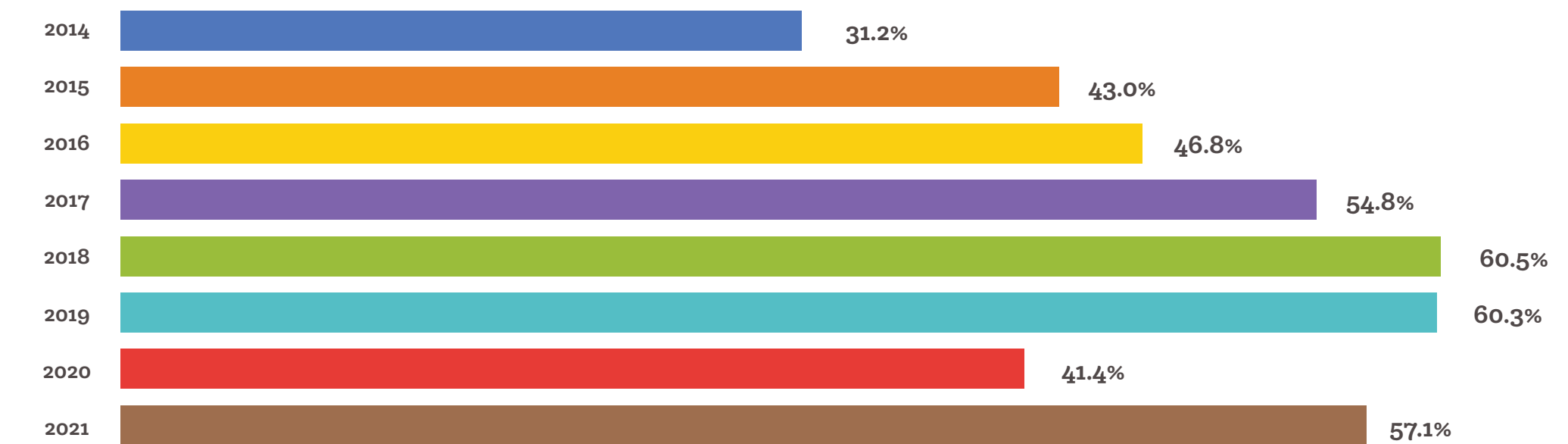


### PARK TRENDS

#### Peak Season Free Shuttle Ridership



#### Park Visitors Visiting More Than One Location



## TRENDS

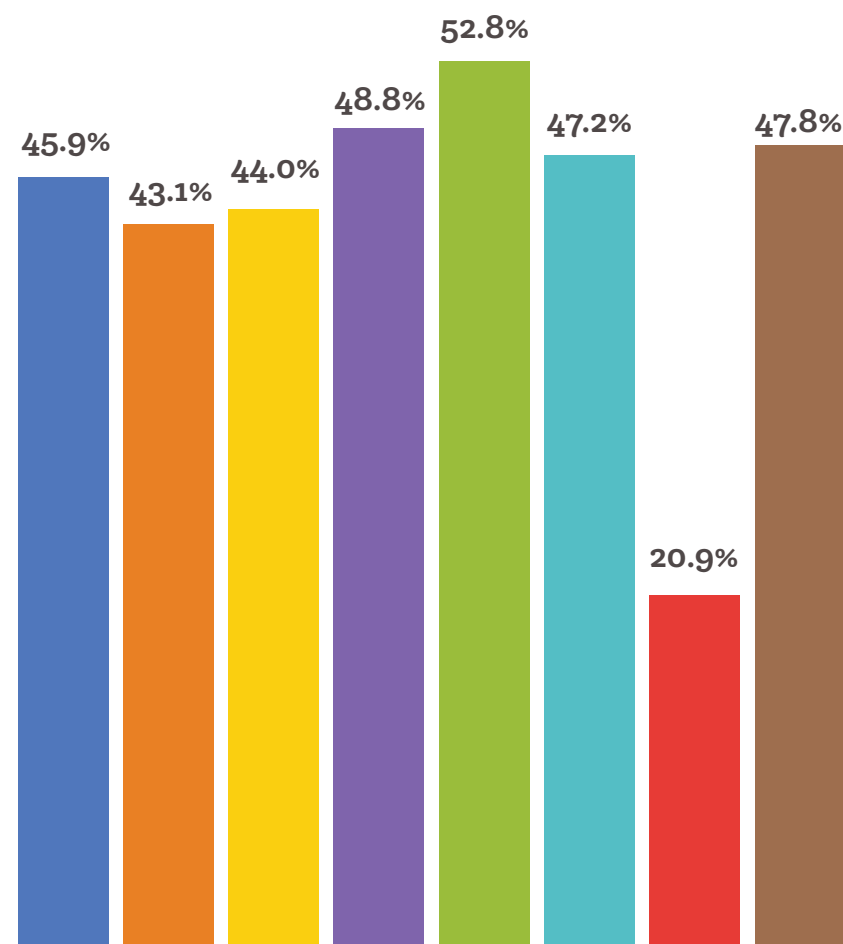




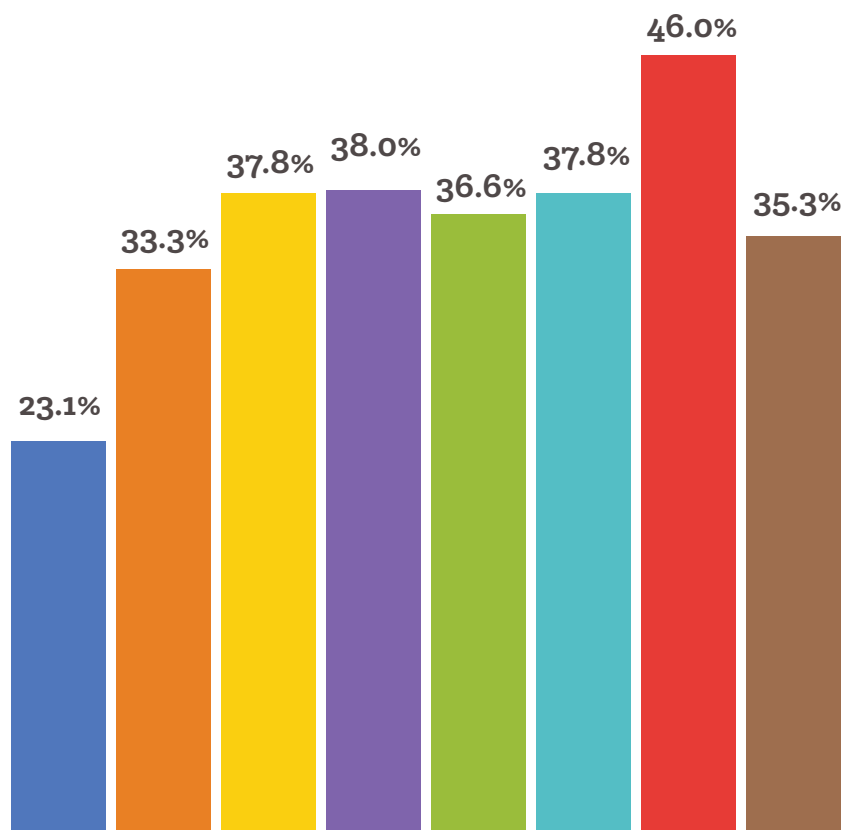
TRENDS

## PARK TRENDS

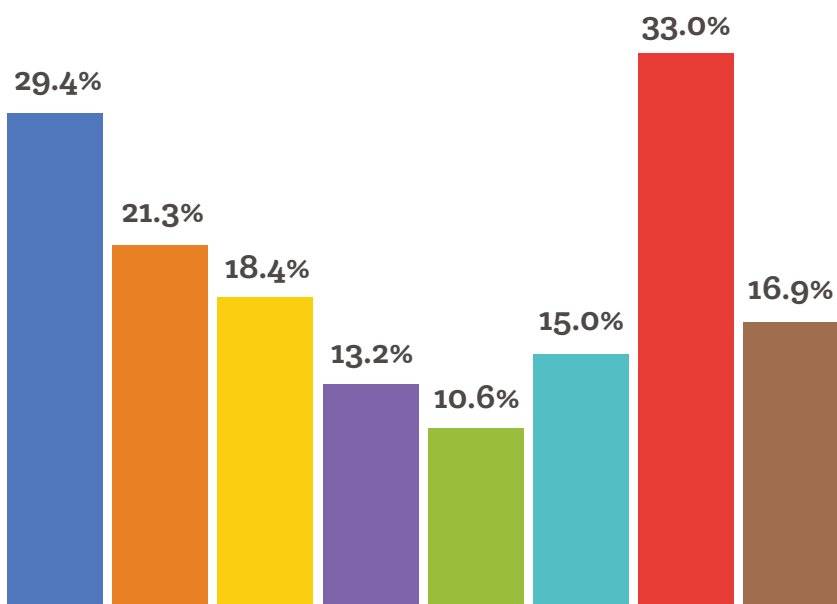
### Frequency of Visits



First Time



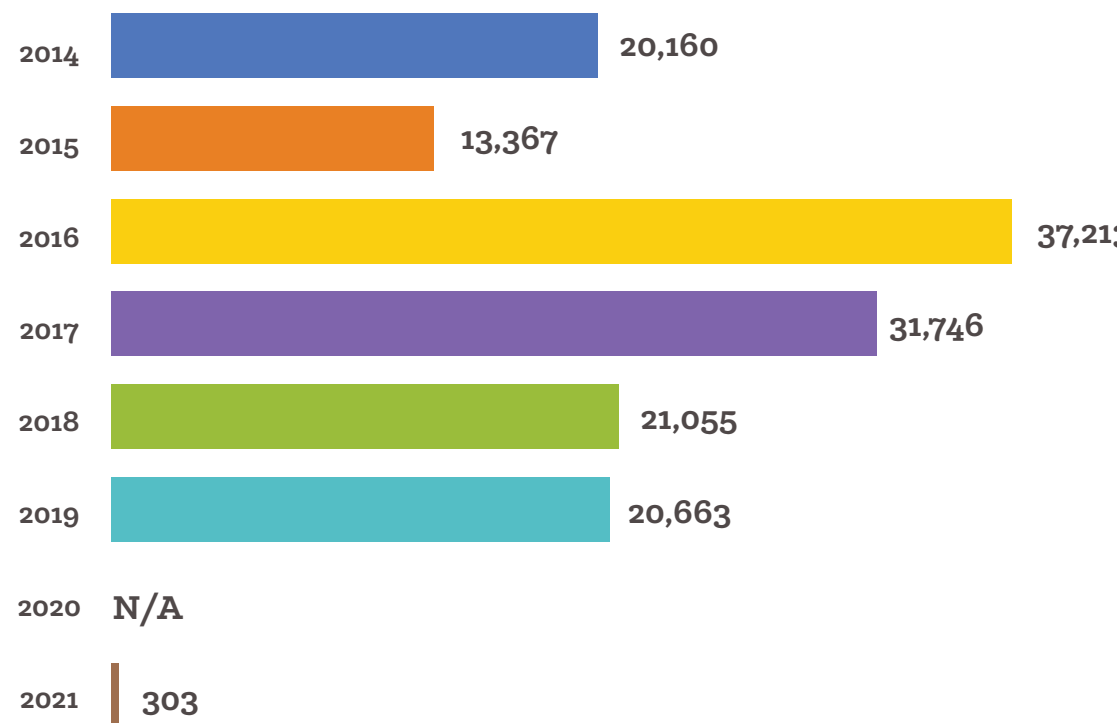
Infrequent



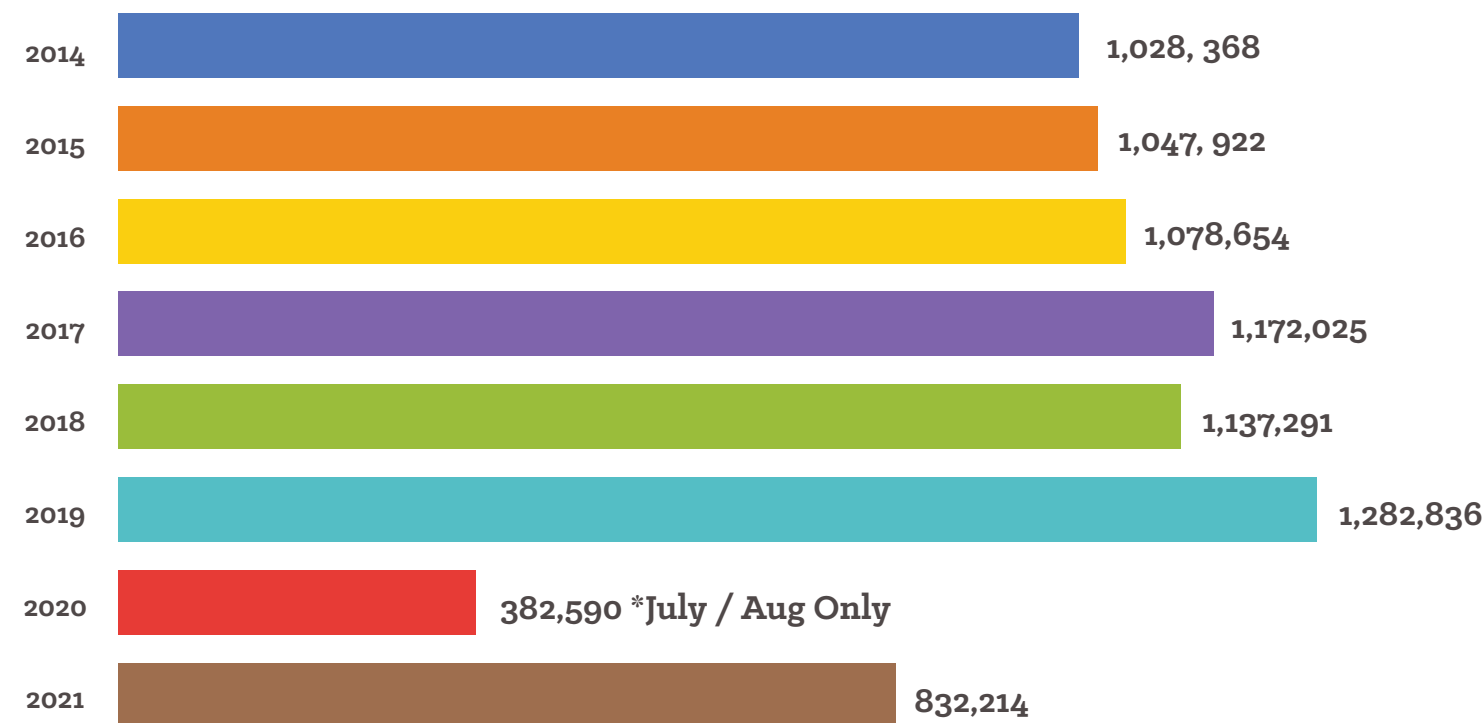
Frequent

## PARK TRENDS

### Offsite Bus Ridership Peak Season



### Total Peak Season Attendance



### Parking June-August 2021

South End Transactions **122,801**

North End Transactions **114,471**

South End Average Purchase Time **2.9**

North End Average Purchase Time **1.9**



TRENDS



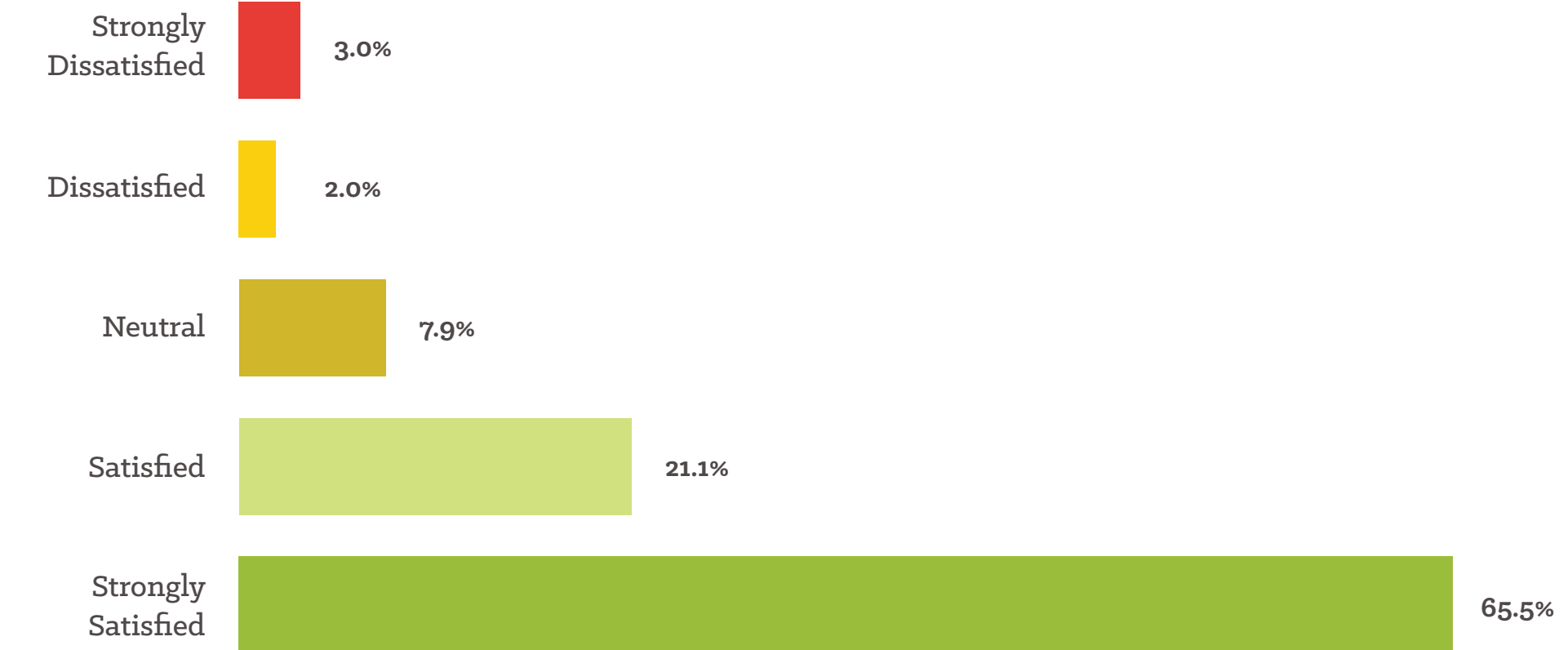


## VISITOR EXPERIENCE & ATTITUDES

*How are we  
serving our visitors?*

### VISITOR EXPERIENCE

#### Free Shuttle Rating



**Average Rating: 4.4**



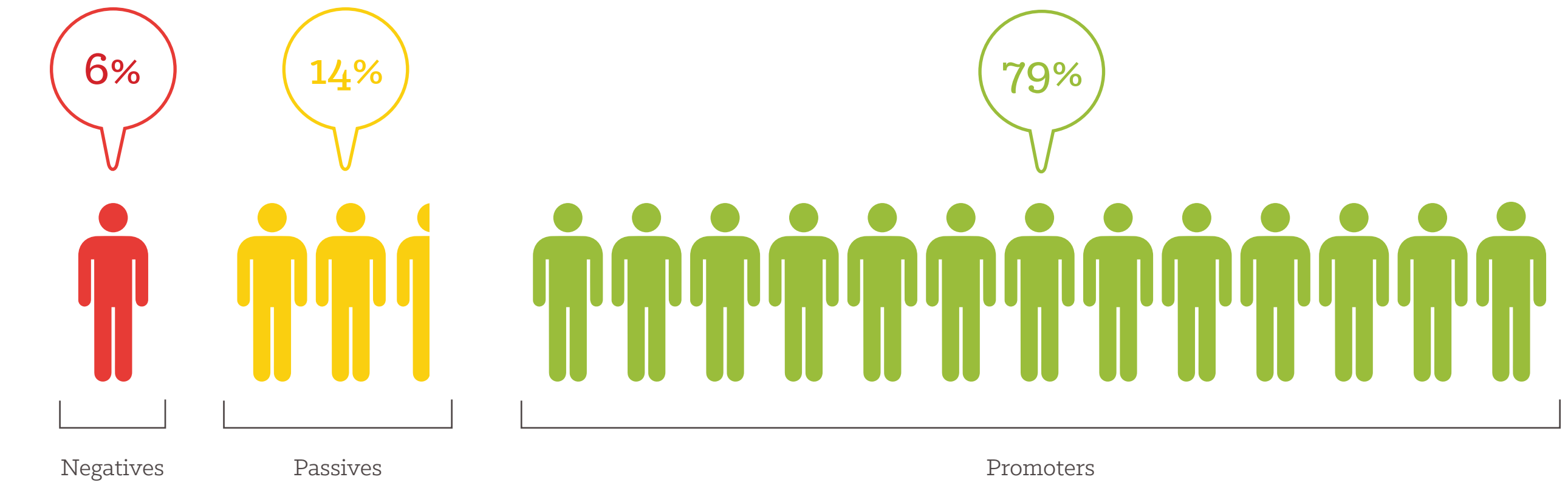
VISITOR  
EXPERIENCE  
&  
ATTITUDES





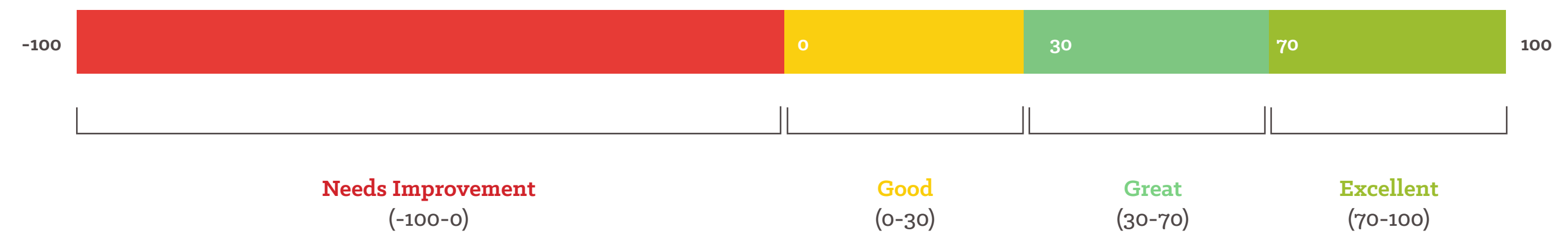
# VISITOR EXPERIENCE

Net Promoter Score



Net Promoter Score: **73**

What is a Good Net Promoter Score?

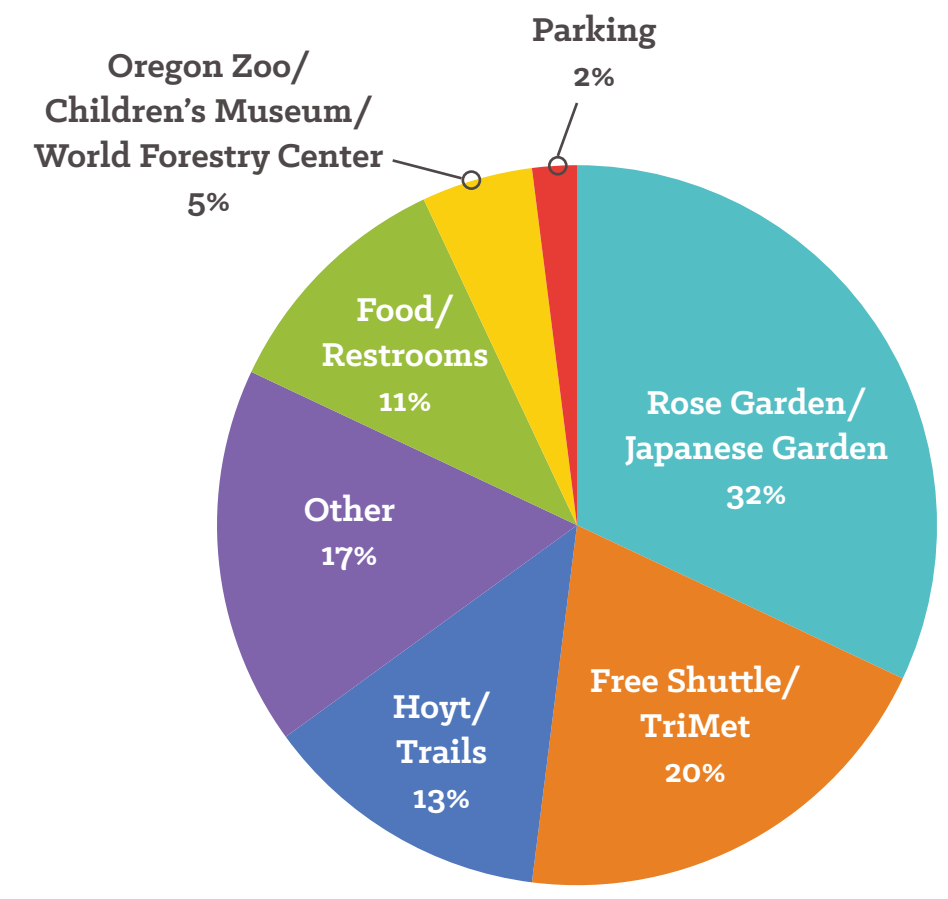


# VISITOR EXPERIENCE

**40,862**

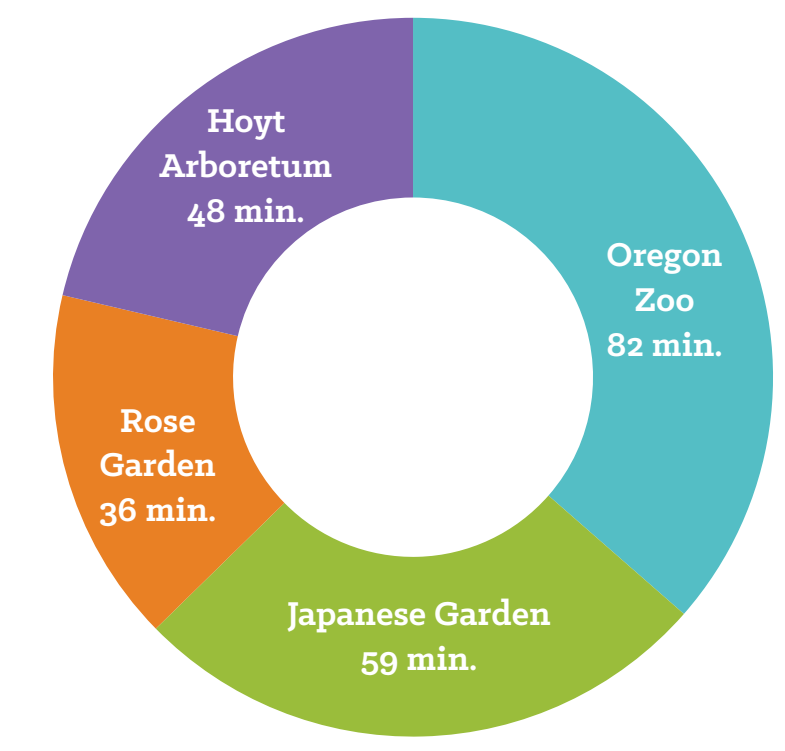
Staff Visitor Interactions

Topics of Conversations with Visitor Service Staff



Peak Season Length  
of Stay Per Venue\*

\*Collected from Uber Media/Vista visitor cell phone data.





# Annual Transportation Report

# WASHINGTON PARK 2021

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