Annual Transportation Report

WASHINGTON PARK

2021
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 Moore – Travel Portland
JC Vannatta – TriMet
Joe Furia – World Forestry Center
Kathy Goodall – Arlington Heights Neighborhood Association
Heidi Balan – Oregon Zoo

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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) by conducting modeling that cross-referenced these 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.

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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.

How was their experience?
### Visitor Profiles: Who's coming to the Park?

#### June - August

**PEAK SEASON VISITORS**

**Group Makeup**

<table>
<thead>
<tr>
<th>Group Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adults only</td>
<td>58.5%</td>
</tr>
<tr>
<td>Groups w/ children under 7</td>
<td>21.9%</td>
</tr>
<tr>
<td>Groups w/ children 7-17</td>
<td>19.6%</td>
</tr>
</tbody>
</table>

**Race & Ethnicity**

- **White**: 70.1%
- **Hispanic/Latino**: 10.3%
- **Biracial/Multiracial**: 3.4%
- **Other**: 1.5%
- **American Indian/Alaska Native**: 1.5%
- **African American**: 3.1%
- **Pacific Islander**: 1.1%
- **Asian**: 9%

**Education**

- **No Diploma**: 0.77%
- **Less Than 8th Grade**: 0.84%
- **High School Graduate or GED**: 6.76%
- **Some College (No Degree)**: 14.68%
- **Associate’s Degree**: 8.45%
- **Bachelor’s Degree**: 35.7%
- **Post Graduate**: 32.8%

**Origin**

- **OR & WA**: 17%
- **International**: 1%
- **U.S.**: 36%
- **Portland Metro**: 46%

**Membership**

- **Members**: 18.2%
- **Non-Members**: 81.8%

**Income**

- **Under $25K**: 9%
- **$25K-$39.9K**: 10.1%
- **$30K-$44.9K**: 8.8%
- **$40K-$54.9K**: 8.8%
- **$55K-$69.9K**: 11.8%
- **$70K-$84.9K**: 15.5%
- **$85K-$99.9K**: 7.6%
- **Over $100K**: 37.2%

**Education by Income**

- **Some College (No Degree)**: 0.84%
- **High School Graduate or GED**: 6.76%
- **Associate’s Degree**: 8.45%
- **Bachelor’s Degree**: 35.7%
- **Post Graduate**: 32.8%

**Income by Education**

- **No Diploma**: 0.77%
- **Less Than 8th Grade**: 0.84%
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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.
### Where are visitors going?

#### By Location

<table>
<thead>
<tr>
<th>Destination</th>
<th>Visits</th>
</tr>
</thead>
<tbody>
<tr>
<td>World Forestry Center</td>
<td>0.01%</td>
</tr>
<tr>
<td>Discovery Museum</td>
<td>Closed</td>
</tr>
<tr>
<td>Hoyt Arboretum</td>
<td>17.5%</td>
</tr>
<tr>
<td>Portland Japanese Garden</td>
<td>17.5%</td>
</tr>
<tr>
<td>International Rose Test Garden</td>
<td>21%</td>
</tr>
<tr>
<td>Oregon Zoo</td>
<td>44%</td>
</tr>
<tr>
<td>Rose Garden</td>
<td>17%</td>
</tr>
<tr>
<td>Hoyt Arboretum</td>
<td>17%</td>
</tr>
</tbody>
</table>

#### Total Visits

- **832,214**

### Who is in the Group?

<table>
<thead>
<tr>
<th>Group Type</th>
<th>Adults only</th>
<th>Groups with children</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adults only</td>
<td>76.6%</td>
<td>12.8%</td>
</tr>
<tr>
<td>Groups with children</td>
<td>17.4%</td>
<td>6.7%</td>
</tr>
</tbody>
</table>

### Are they a Venue Member?

<table>
<thead>
<tr>
<th>Venue Type</th>
<th>Non-Member</th>
<th>Member</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oregon Zoo</td>
<td>93.3%</td>
<td>6.7%</td>
</tr>
<tr>
<td>Rose Garden</td>
<td>99.7%</td>
<td>0.3%</td>
</tr>
<tr>
<td>Hoyt Arboretum</td>
<td>97.5%</td>
<td>2.5%</td>
</tr>
<tr>
<td>Portland Japanese Garden</td>
<td>99.7%</td>
<td>0.3%</td>
</tr>
</tbody>
</table>

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2021 Washington Park Visitor Survey Report
Where are they Coming From?

- Portland Metro
- Oregon/WA
- U.S.
- International

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%
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.
## VISITOR MODE SPLITS

### Parkwide Mode Split

<table>
<thead>
<tr>
<th>Mode Split by Location</th>
<th>Vehicle</th>
<th>Transit</th>
<th>Active</th>
<th>Rideshare Service &amp; Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oregon Zoo</td>
<td>68.7%</td>
<td>13.1%</td>
<td>9.9%</td>
<td>3.3%</td>
</tr>
<tr>
<td>Japanese Garden</td>
<td>71.9%</td>
<td>13.3%</td>
<td>9.2%</td>
<td>5.6%</td>
</tr>
<tr>
<td>Rose Garden</td>
<td>69.8%</td>
<td>13.6%</td>
<td>9.2%</td>
<td>5.4%</td>
</tr>
<tr>
<td>Hoyt Arboretum</td>
<td>70.4%</td>
<td>13.0%</td>
<td>9.0%</td>
<td>5.6%</td>
</tr>
</tbody>
</table>

*Includes walking, biking, skateboarding
## 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

<table>
<thead>
<tr>
<th>Mode Split Based on Where they are Coming From</th>
<th>Vehicle</th>
<th>Transit</th>
<th>Active</th>
<th>Rideshare Service &amp; Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Portland Metro</td>
<td>72.3%</td>
<td>5.8%</td>
<td>15.9%</td>
<td>0.0%</td>
</tr>
<tr>
<td>OR &amp; WA</td>
<td>68.8%</td>
<td>6.7%</td>
<td>19.5%</td>
<td>0.8%</td>
</tr>
<tr>
<td>U.S</td>
<td>68.8%</td>
<td>15.5%</td>
<td>15.2%</td>
<td>0.4%</td>
</tr>
<tr>
<td>International</td>
<td>70.6%</td>
<td>32.6%</td>
<td>25.7%</td>
<td>0.0%</td>
</tr>
</tbody>
</table>

### Mode Split Based Group Type

#### Adult Only
- Vehicle: 66.4%
- Transit: 74.9%
- Active: 74.6%
- Rideshare Service & Other: 10.1%

#### Groups with Children (0-17 years old)
- Vehicle: 86.7%
- Transit: 6.3%
- Active: 3.9%
- Rideshare Service & Other: 3.1%

#### Non-Member
- Vehicle: 79.8%
- Transit: 18.1%
- Active: 7.7%
- Rideshare Service & Other: 1.6%
TRENDS

How are things changing?

HOW VISITORS ARE GETTING TO THE PARK

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</thead>
<tbody>
<tr>
<td>Vehicle</td>
<td>80.7%</td>
<td>77.0%</td>
<td>66.9%</td>
<td>63.2%</td>
<td>61.6%</td>
<td>64.4%</td>
<td>75.6%</td>
<td></td>
</tr>
<tr>
<td>Transit</td>
<td></td>
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<tr>
<td></td>
<td>12.2%</td>
<td>15.8%</td>
<td>17.3%</td>
<td>19.5%</td>
<td>22.6%</td>
<td>20.0%</td>
<td>5.5%</td>
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<td>Active</td>
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<tr>
<td></td>
<td>8.3%</td>
<td>3.6%</td>
<td>7.2%</td>
<td>6.8%</td>
<td>5.5%</td>
<td>5.2%</td>
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<td></td>
</tr>
<tr>
<td>Rideshare Service &amp; Other</td>
<td>1.7%</td>
<td>3.1%</td>
<td>13.2%</td>
<td>15.8%</td>
<td>17.3%</td>
<td>21.9%</td>
<td>21.0%</td>
<td>20.0%</td>
</tr>
</tbody>
</table>

The graph shows the percentage of visitors using different modes of transportation to the park from 2014 to 2021. The mode with the highest percentage in 2014 was Vehicle at 80.7%, while in 2021, it increased to 75.6%. Transit usage started at 12.2% in 2014 and decreased to 5.5% in 2021. The mode with the lowest percentage is Rideshare Service & Other, which increased from 1.7% in 2014 to 21.9% in 2021.
TRENDS

HOW VISITORS ARE GETTING AROUND THE PARK


Vehicle
- 2014: 17.0%
- 2015: 17.0%
- 2016: 15.6%
- 2017: 19.9%
- 2018: 17.7%
- 2019: 22.3%
- 2020: 29.0%
- 2021: 59.9%

Transit
- 2014: 17.0%
- 2015: 17.0%
- 2016: 17.0%
- 2017: 17.0%
- 2018: 17.7%
- 2019: 22.3%
- 2020: 29.0%
- 2021: 59.9%

Rideshare Service & Other
- 2014: 7.7%
- 2015: 10.0%
- 2016: 11.7%
- 2017: 18.3%
- 2018: 23.6%
- 2019: 21.9%
- 2020: 20.3%
- 2021: 17.2%

PARK TRENDS

Peak Season Free Shuttle Ridership
- 2014: 70,843
- 2015: 76,841
- 2016: 97,878
- 2017: 99,994
- 2018: 86,818
- 2019: 93,214
- 2020: 46,271
- 2021: 3,359

Park Visitors Visiting More Than One Location
- 2014: 11.7%
- 2015: 11.7%
- 2016: 60.6%
- 2017: 60.6%
- 2018: 54.9%
- 2019: 60.6%
- 2020: 60.6%
- 2021: 57.1%
**TRENDS**

**Frequency of Visits**

<table>
<thead>
<tr>
<th>Year</th>
<th>First Time</th>
<th>Infrequent</th>
<th>Frequent</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>43.3%</td>
<td>44.0%</td>
<td>12.7%</td>
</tr>
<tr>
<td>2015</td>
<td>43.3%</td>
<td>44.0%</td>
<td>12.7%</td>
</tr>
<tr>
<td>2016</td>
<td>46.9%</td>
<td>32.1%</td>
<td>11.2%</td>
</tr>
<tr>
<td>2017</td>
<td>46.9%</td>
<td>32.1%</td>
<td>11.2%</td>
</tr>
<tr>
<td>2018</td>
<td>46.0%</td>
<td>32.1%</td>
<td>11.8%</td>
</tr>
<tr>
<td>2019</td>
<td>45.3%</td>
<td>32.1%</td>
<td>11.8%</td>
</tr>
<tr>
<td>2020</td>
<td>52.8%</td>
<td>32.1%</td>
<td>11.8%</td>
</tr>
<tr>
<td>2021</td>
<td>52.8%</td>
<td>32.1%</td>
<td>11.8%</td>
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</table>

**PARK TRENDS**

**Offsite Bus Ridership Peak Season**

<table>
<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>First Time</td>
<td>20,160</td>
<td>13,367</td>
<td>37,213</td>
<td>31,746</td>
<td>21,055</td>
<td>20,663</td>
<td>382,590</td>
<td>20,663</td>
</tr>
<tr>
<td>Infrequent</td>
<td>20,160</td>
<td>13,367</td>
<td>37,213</td>
<td>31,746</td>
<td>21,055</td>
<td>20,663</td>
<td>382,590</td>
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<td>Frequent</td>
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<td>37,213</td>
<td>31,746</td>
<td>21,055</td>
<td>20,663</td>
<td>382,590</td>
<td>20,663</td>
</tr>
</tbody>
</table>

**Total Peak Season Attendance**

<table>
<thead>
<tr>
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<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>1,028,368</td>
<td>1,047,922</td>
<td>1,078,654</td>
<td>1,172,025</td>
<td>1,137,291</td>
<td>382,590</td>
<td>1,282,836</td>
<td>832,214</td>
</tr>
<tr>
<td>2015</td>
<td>1,243,352</td>
<td>1,243,352</td>
<td>1,243,352</td>
<td>1,243,352</td>
<td>1,243,352</td>
<td>1,243,352</td>
<td>1,243,352</td>
<td>1,243,352</td>
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<tr>
<td>2016</td>
<td>1,370,654</td>
<td>1,370,654</td>
<td>1,370,654</td>
<td>1,370,654</td>
<td>1,370,654</td>
<td>1,370,654</td>
<td>1,370,654</td>
<td>1,370,654</td>
</tr>
<tr>
<td>2017</td>
<td>1,473,811</td>
<td>1,473,811</td>
<td>1,473,811</td>
<td>1,473,811</td>
<td>1,473,811</td>
<td>1,473,811</td>
<td>1,473,811</td>
<td>1,473,811</td>
</tr>
<tr>
<td>2018</td>
<td>1,512,495</td>
<td>1,512,495</td>
<td>1,512,495</td>
<td>1,512,495</td>
<td>1,512,495</td>
<td>1,512,495</td>
<td>1,512,495</td>
<td>1,512,495</td>
</tr>
<tr>
<td>2019</td>
<td>1,583,051</td>
<td>1,583,051</td>
<td>1,583,051</td>
<td>1,583,051</td>
<td>1,583,051</td>
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<tr>
<td>2020</td>
<td>1,612,026</td>
<td>1,612,026</td>
<td>1,612,026</td>
<td>1,612,026</td>
<td>1,612,026</td>
<td>1,612,026</td>
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</tr>
<tr>
<td>2021</td>
<td>1,651,314</td>
<td>1,651,314</td>
<td>1,651,314</td>
<td>1,651,314</td>
<td>1,651,314</td>
<td>1,651,314</td>
<td>1,651,314</td>
<td>1,651,314</td>
</tr>
</tbody>
</table>

**Parking June-August 2021**

<table>
<thead>
<tr>
<th>Type</th>
<th>Transactions</th>
<th>Average Purchase Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>South End</td>
<td>122,801</td>
<td>2.9</td>
</tr>
<tr>
<td>North End</td>
<td>114,471</td>
<td>1.9</td>
</tr>
</tbody>
</table>
VISITOR EXPERIENCE & ATTITUDES

How are we serving our visitors?

Free Shuttle Rating

<table>
<thead>
<tr>
<th>Rating</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strongly Dissatisfied</td>
<td>2.0%</td>
</tr>
<tr>
<td>Dissatisfied</td>
<td>2.0%</td>
</tr>
<tr>
<td>Neutral</td>
<td>7.0%</td>
</tr>
<tr>
<td>Satisfied</td>
<td>21.1%</td>
</tr>
<tr>
<td>Strongly Satisfied</td>
<td>65.5%</td>
</tr>
</tbody>
</table>

Average Rating: **4.4**
**VISITOR EXPERIENCE**

**Net Promoter Score**

<table>
<thead>
<tr>
<th></th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Negative</td>
<td>6%</td>
</tr>
<tr>
<td>Passives</td>
<td>14%</td>
</tr>
<tr>
<td>Promoters</td>
<td>79%</td>
</tr>
</tbody>
</table>

**Net Promoter Score:** 73

**What is a Good Net Promoter Score?**

- Needs Improvement (-100-0)
- Good (0-30)
- Great (30-70)
- Excellent (70-100)

**VISITOR EXPERIENCE**

**Staff Visitor Interactions**

40,862

**Topics of Conversations with Visitor Service Staff**

- Peak Season Length of Stay Per Venue:
  - Oregon Zoo/Children’s Museum/World Forestry Center: 6%
  - Free Shuttle/TiME: 17%
  - Food/Restrooms: 11%
  - Parking: 2%
  - Hort/Trails: 5%
  - Rose Garden/Japanese Garden: 37%
  - Free Shuttle/TiME: 20%
  - Hoyt/Trails: 13%
  - Other: 17%
  - Admission/30 min: 5%
  - Rose Garden: 12 min
  - Japanese Garden: 31 min
  - Oregon Zoo: 92 min

- Collected from Uber Media/Visitor cell phone data.