Annual Transportation Report

WASHINGTON PARK 2022

Explore
WASHINGTON PARK

Explore WASHINGTON PARK

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.

2022 marks the 9th 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 1,305 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
- World Forestry Center

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.

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).

This year's survey illuminates a second full year of "recovery" from the COVID-19 pandemic. In the data we see modest increases in usage, length of stay, and cross-venue visitation for park visitors. But numbers are adjusting only incrementally in the direction of pre-pandemic levels.

One of the strengths of this survey and report has been the strong consistency of questions for the better part of a decade. This year, we worked with our RTO grant Diversity, Equity, and Inclusion Consultant (Four Forces) to add three additional questions which will help us understand the experience of underserved audiences in the park as well as further insight into the impression all audiences have of park culture.

KEY TAKEWAYS

Demographics:
Demographics were extremely similar to those collected in 2021, with the exception of an increase of 50% of international tourists over 2021 numbers.

Attendance:
The survey revealed 873,000 visitors in 2022's peak season, a 5% (+40,000)increase in parkwide attendance over 2021 numbers. This is 67% of pre-pandemic peak season visitor numbers (1.3M).

Travel to and around the Park:
At 8%, the public transit usage portion of the mode split is the lowest since surveying started in 2014, which saw a split of 13%. This constitutes a loss of 3 percentage points from our previous year's survey. Rideshare and private automobile usage increased in correlated percentages.

With attendance increasing, but transit use decreasing, pressure on parking continues to grow. While attendance between 2019 and 2022 saw a 31% decrease, the number of people using overflow increased by 25% in this same time period.

Visitor Experience:
In 2022, Net Promoter Scores (NPS) fell in the upper portion of the "great" range (30 to 70) for both the park and the shuttle experiences. NPS for "How likely are you to recommend Washington Park to a friend," was 65, a 4% drop from 2021. (NPS is calculated using a 200 point scale, ranging from -100 to 100.)

New Questions:
This year we added questions to benchmark EWP's equity efforts. This showed that 96% of people agreed or strongly agreed that they felt welcomed in Washington Park, with only .4% disagreeing and none strongly disagreeing.
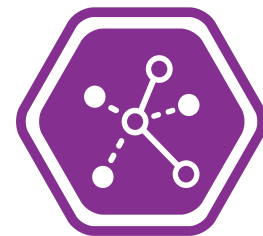
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VISITOR PROFILES

Who's coming to the Park?

VISITOR PROFILES

Group Makeup

- Adults only 42.5%
- Children under 7 31.8%
- Groups w/ Youth 7-17 25.7%

Race & Ethnicity

- White/Caucasian 72.9%
- Asian 10.7%
- Hispanic/Latino 9.4%
- Prefer not to Identify 5.3%
- Biracial/Multiracial 3.0%
- Black/African American 2.7%
- Other 1.3%
- American Indian/Alaska Native 1.2%
- Native Hawaiian / Pacific Islander 1.1%

Education
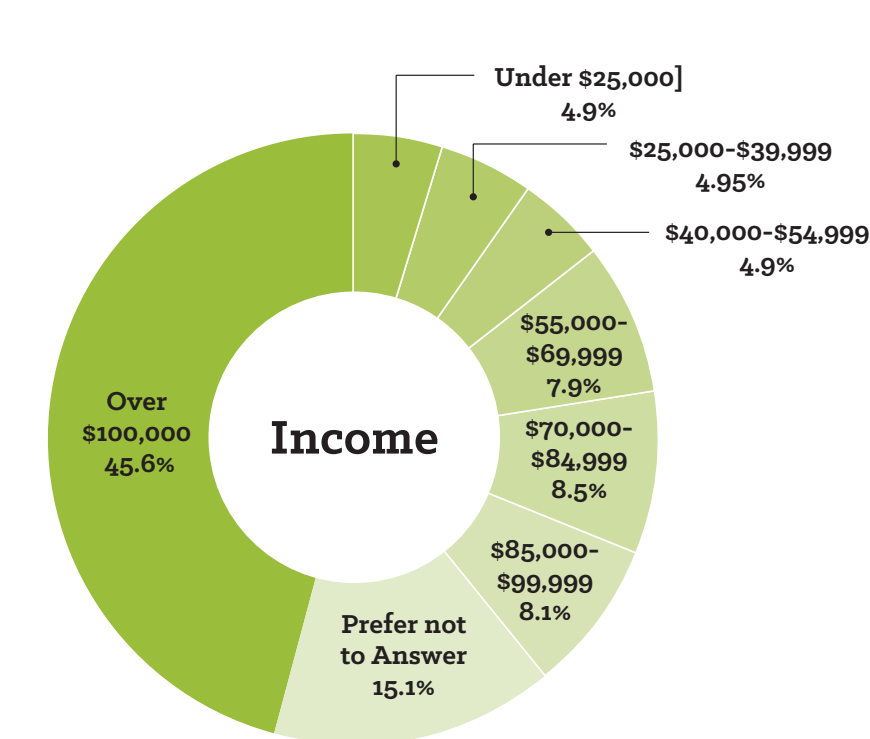
- Post-Graduate 36.8%
- Bachelor's degree 34.2%
- Some college, no degree 12.3%
- Associate's degree 6.7%
- High school graduate or GED 5.5%
- Prefer not to answer 3.8%
- 12th grade or less (no diploma) 0.5%
- 8th grade or less: 0.20%

Income

- Over $100,000 45.6%
- Prefer not to Answer 15.1%
- $85,000-$99,999 8.1%
- $70,000-$84,999 8.5%
- $55,000-$69,999 7.9%
- $40,000-$54,999 4.9%
- $25,000-$39,999 4.95%
- Under $25,000] 4.9%

Gender

- Female or female-identified 57.9%
- Male or male-identified 35.4%
- Prefer not to Identify 3.7%
- Non-binary 2.3%
- Prefer to self-identify 0.6%

Origin

- Oregon & Washington 38.5%
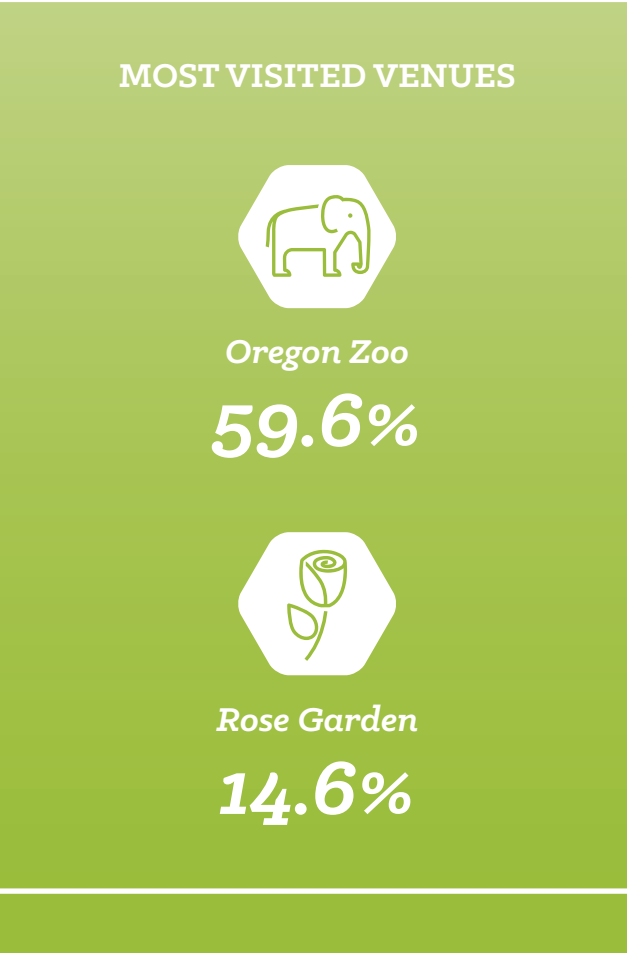- U.S. 30.7%
- Portland Metro 26.8%
- International 4.1%
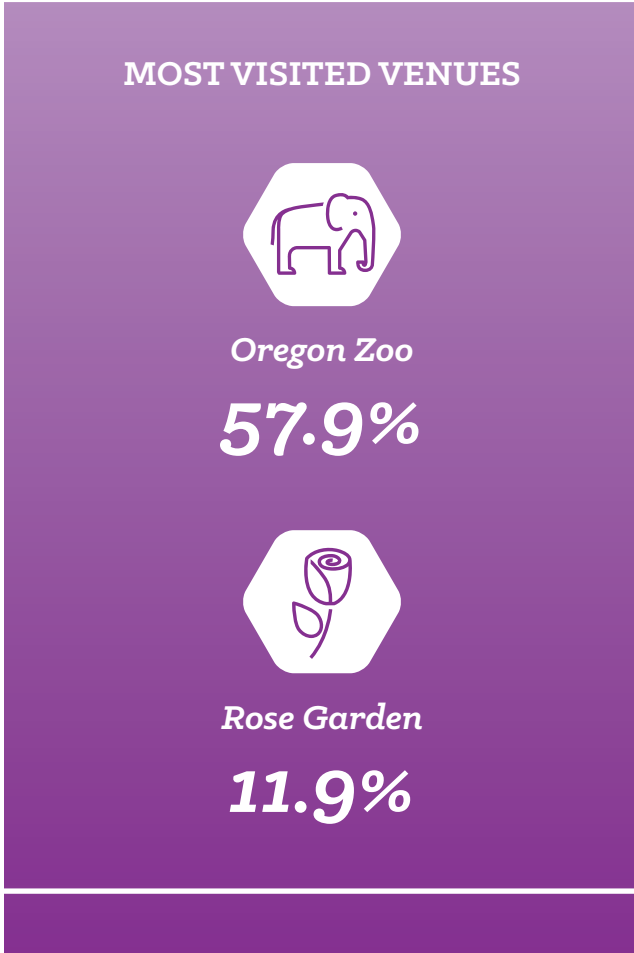
VISITOR PROFILES

An analysis of survey data revealed six unique Washington Park visitor profiles. Many of the profile percentages are unchanged or very similar to percentages from the 2021, with a few exceptions:

- Couple + Friends (No Kids): This survey revealed a 10% increase in park usage by this demographic over 2021.
- A nearly 20% decrease in the use of the park by Large Families/Friends groups against 2021 survey results.
- Roughly one third of total peak season visitors are tourist who stay the night in the Portland area.
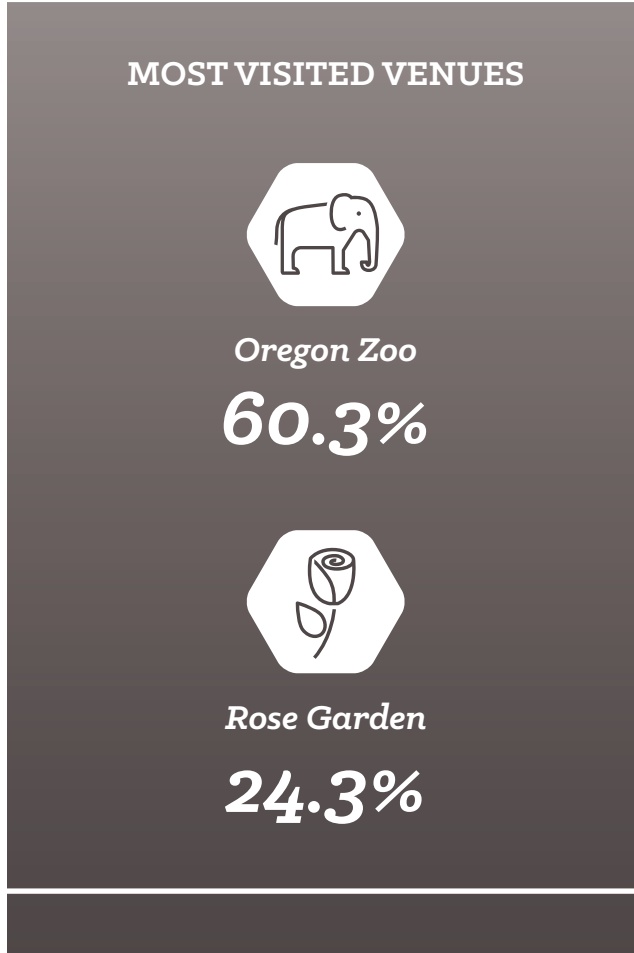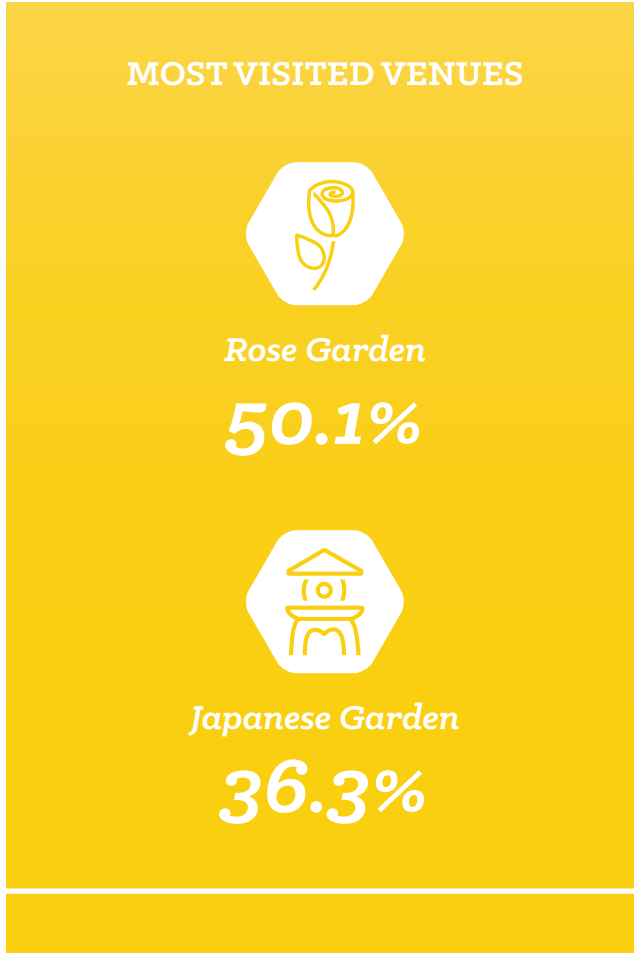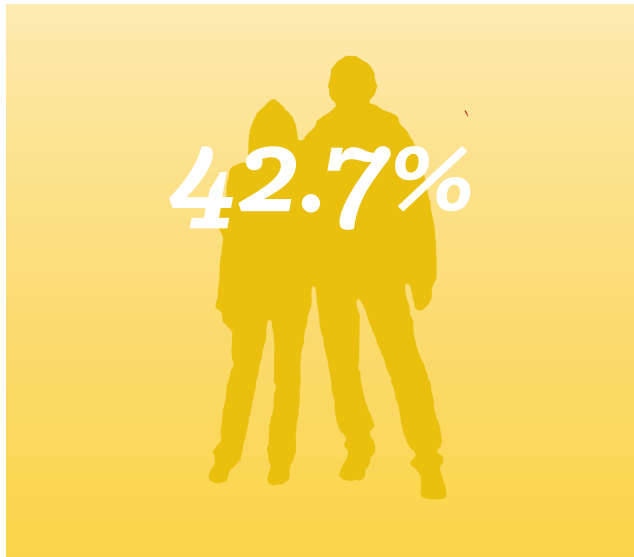
CARETAKER + CHILDREN

6.8%

MOST VISITED VENUES

Oregon Zoo
59.6%

Rose Garden
14.6%

LARGE FAMILY / FRIENDS GROUP

15.5%

MOST VISITED VENUES

Oregon Zoo
57.9%

Rose Garden
11.9%

PORTLAND METRO VISITORS

46.7%

MOST VISITED VENUES

Oregon Zoo
60.3%

Rose Garden
24.3%

COUPLES / FRIENDS (NO KIDS)

42.7%

MOST VISITED VENUES

Rose Garden
50.1%

Japanese Garden
36.3%

TOURISTS STAYING OVERNIGHT

31.3%

MOST VISITED VENUES

Rose Garden
63.7%

Japanese Garden
51.5%

SINGLE ADULTS

7.1%

MOST VISITED VENUES

Rose Garden
49.5%
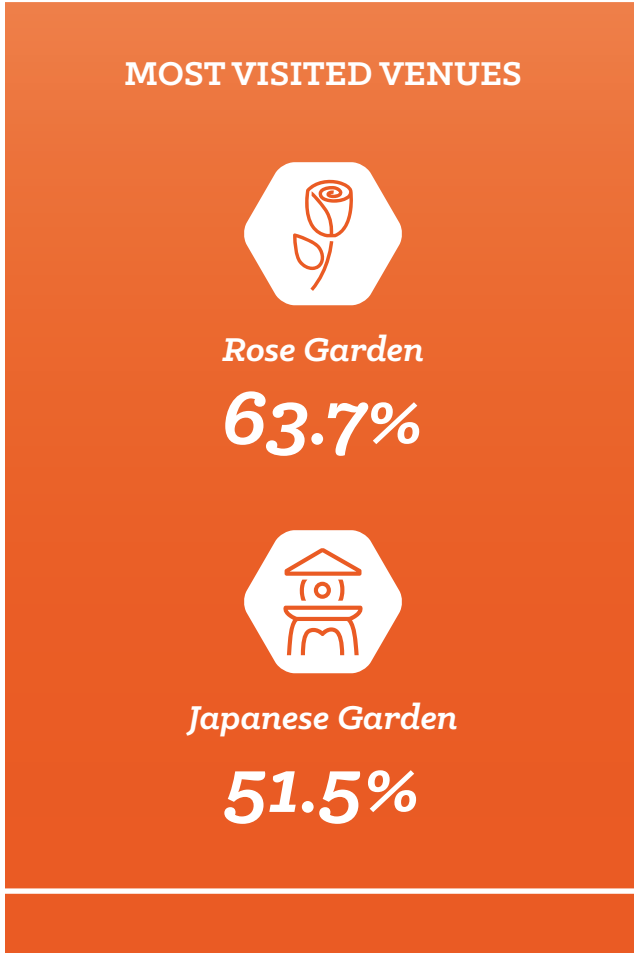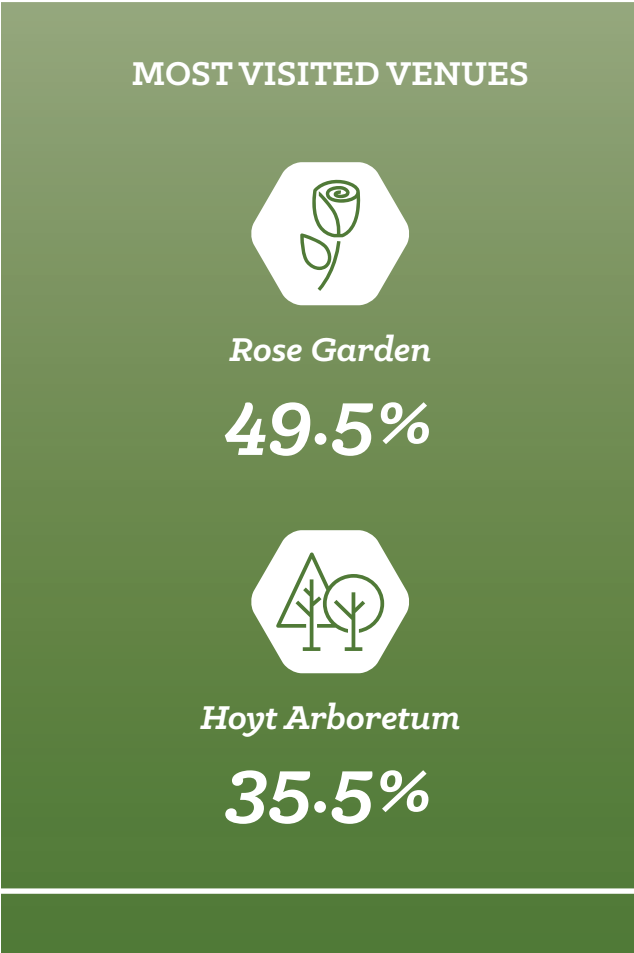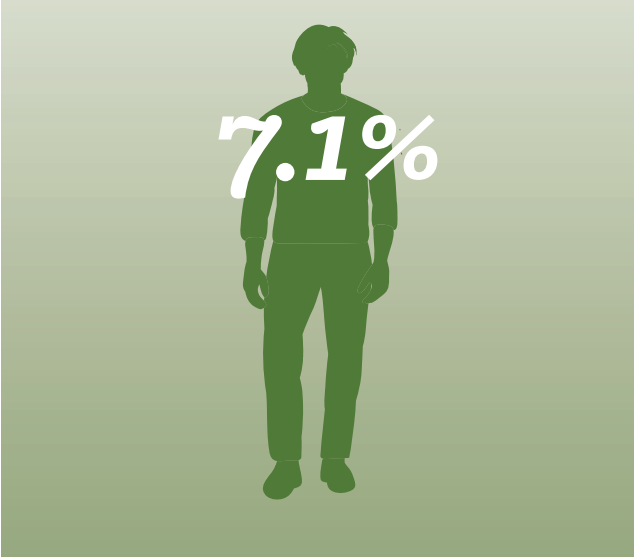
Hoyt Arboretum
35.5%

DESTINATIONS

Where are visitors going?

PEAK SEASON ATTENDANCE

By Location

Hoyt Arboretum — 157,386

Japanese Garden — 135,267

Rose Garden — 185,682

Oregon Zoo — 389,992
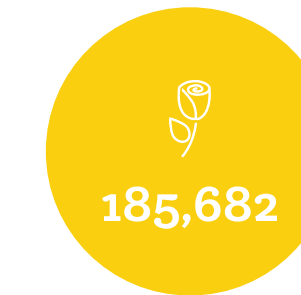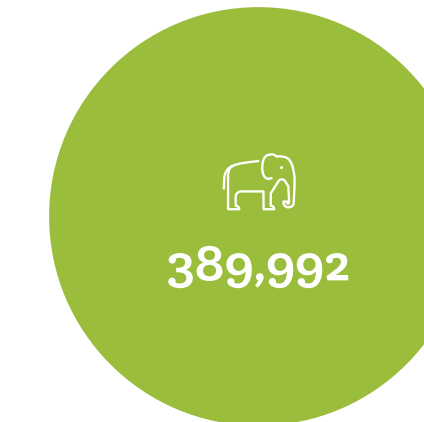
World Forestry Center — 5,253
Did not open until 6/15

Who is in the Group? ■ Groups with Children ■ Adults

Location	Groups with Children	Adults
Oregon Zoo	57.1%	17.7%
Hoyt Arboretum	10.1%	34.9%
World Forestry Center	15.1%	50.0%
Rose Garden	11.2%	0.31%
Japanese Garden	6.1%	20.2%
Not a Member	2.0%	1.2%

Are they a Venue Member?

Location	Percent
Oregon Zoo	21.3%
Hoyt Arboretum	0.92%
World Forestry Center	0.0%
Rose Garden	0.64%
Japanese Garden	4.6%
Not a Member	72.6%

How Frequently do the Visit?

Legend: First Visit ▪ Infrequently ▪ Frequently

	First Visit	Infrequently	Frequently
Oregon Zoo	16.8%	63.7%	19.5%
Japanese Garden	62.8%	30.7%	6.5%
Rose Garden	51.2%	38.0%	10.8%
Hoyt Arboretum	42.7%	31.0%	26.3%
World Forestry Center	42.9%	28.6%	28.6%

Where are they Coming From?

Legend: Portland Metro ▪ OR / WA ▪ US ▪ International

|	Portland Metro	OR / WA	US	International
Oregon Zoo	30.3%	54.2%	14.2	1.4%
Japanese Garden	12.0%	20.6%	58.1%	9.4%
Rose Garden	17.4%	24.4%	51.3%	7.0%
Hoyt Arboretum	31.4%	20.3%	43.1%	5.2%
World Forestry Center	3.8%	93.2%	3.0%	0.0%

Visitor origins remained nearly identical to those found in 2021. Both 2021 and 2022 saw roughly 60% of regional travelers, those living within 200 miles of the Park, come from Washington state.

Though regional travel mirrored previous years, there was an interesting shift in domestic travel this peak season to include far more Central and East Coast destinations in the top 10.
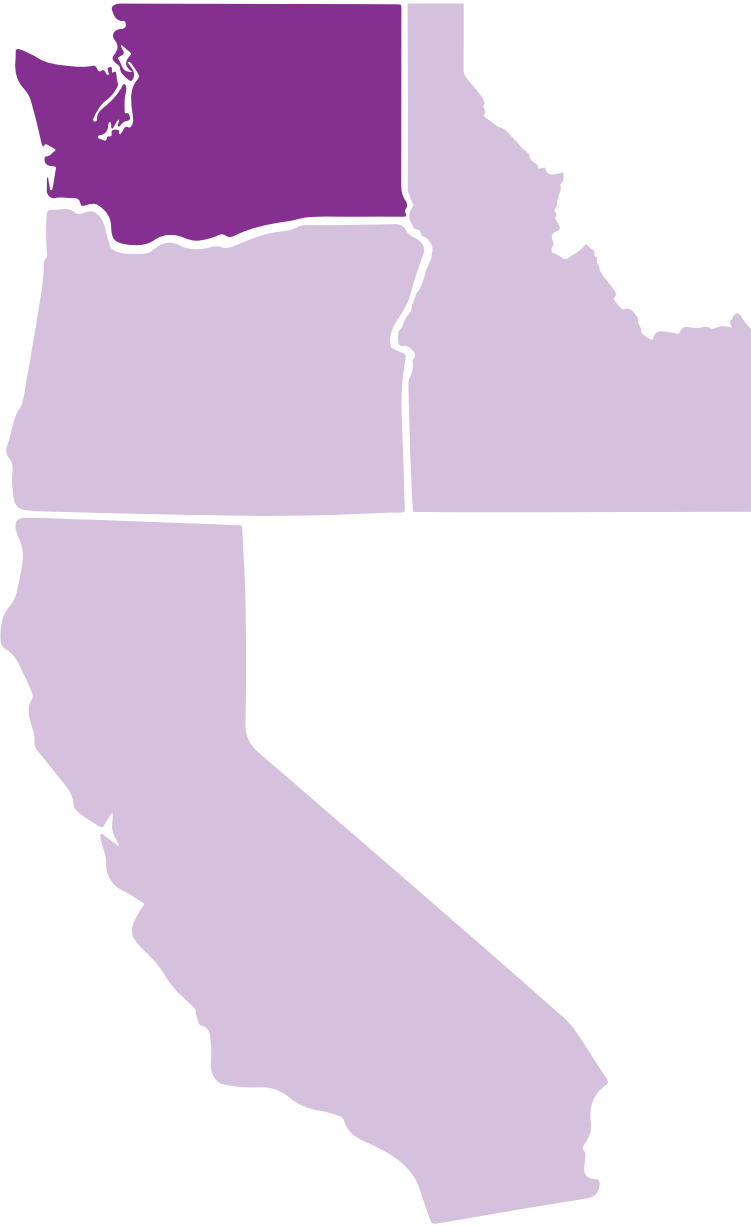
Regional Peak Season Attendees (Oregon/Wash/Idaho/N.Ca)

1. Seattle Area 41.1%
2. Los Angeles 3.85%
3. Phoenix 3.7%
4. Denver 3.7%
5. San Francisco/ Bay Area: 3.3%
6. Salt Lake City 5.0%
7. Other Washington cities 20.7%

Of note: over 60% of regional traffic is from Washington State

Non-regional national travelers (USA)

8. New York 4.2%
9. Chicago 4.0%

Of note: Visitation from Los Angeles saw a significant decrease year over year (-50%)
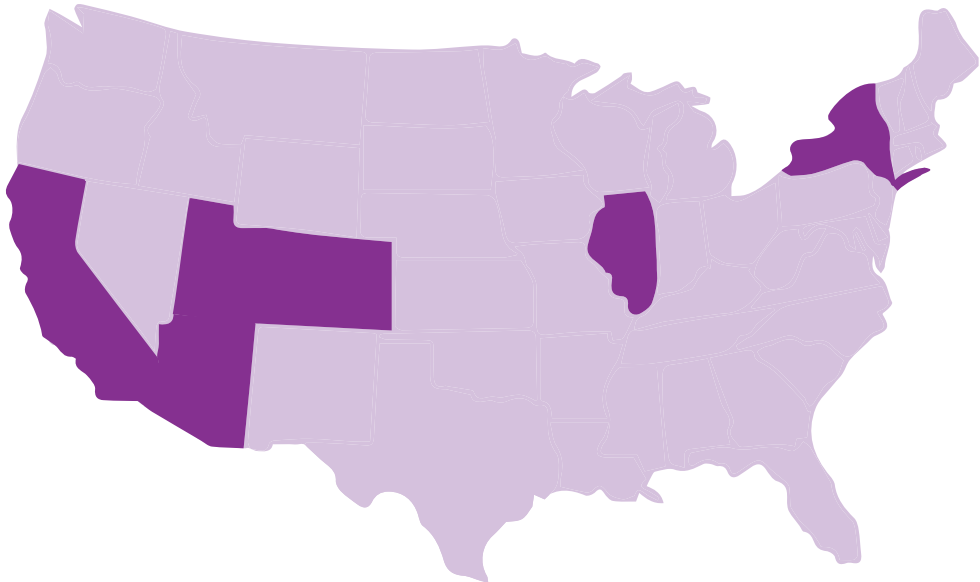
PERCENT OF PARK VISITORS VISITIONG MULTIPLE VENUES AND BREAKDOWN OF WHERE THEY END TO VISIT

There is a strong correlation between those who visit the Japanese Garden and the Rose Garden. 12.6% the percent of Oregon Zoo visitors who visit other destinations is the lowest of all venues. Still, due to the size of Oregon Zoo visitor traffic, this equates to an estimated 50,000 Oregon Zoo cross venue attendees.
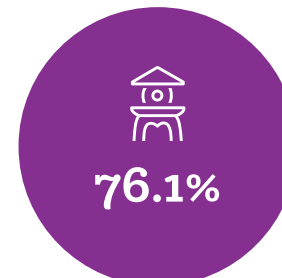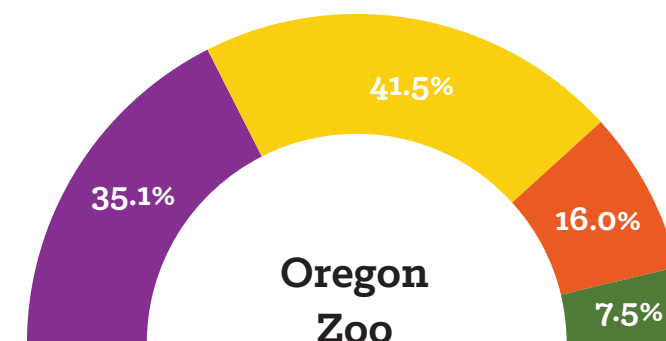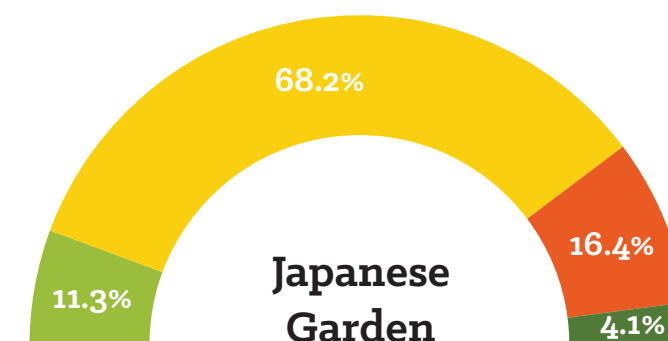
48.4%

of all Park visitors visit multiple venues
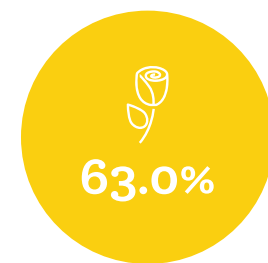
12.6%

of those, they went to:

Oregon Zoo
- 41.5%
- 35.1%
- 16.0%
- 7.5%

76.1%

of those, they went to:
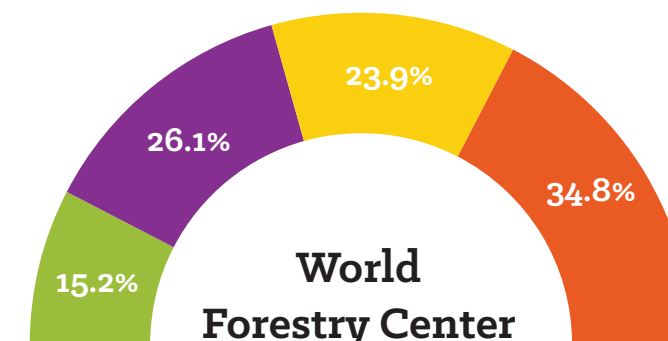
Japanese Garden
- 68.2%
- 11.3%
- 16.4%
- 4.1%

63.0%

of those, they went to:

Rose Garden
- 59.8%
- 11.7%
- 25.2%
- 3.3%

61.4%

of those, they went to:

Hoyt Arboretum
- 51.5%
- 29.5%
- 9.2%
- 9.8%

100.0%

of those, they went to:

World Forestry Center
- 23.9%
- 26.1%
- 15.2%
- 34.8%
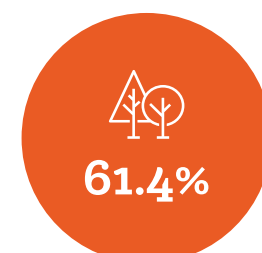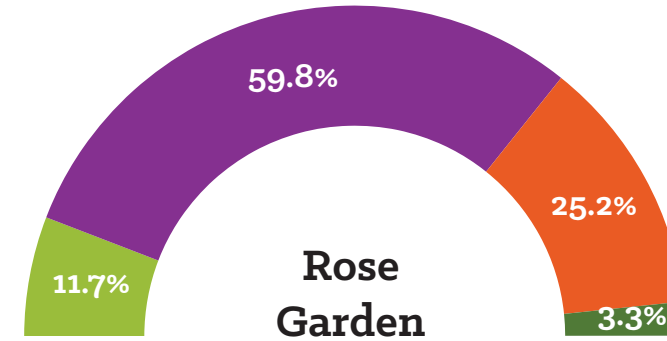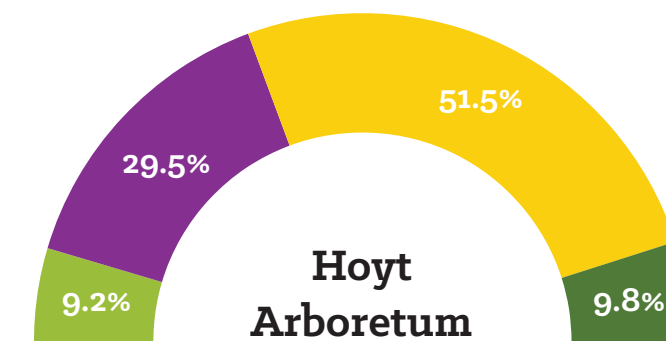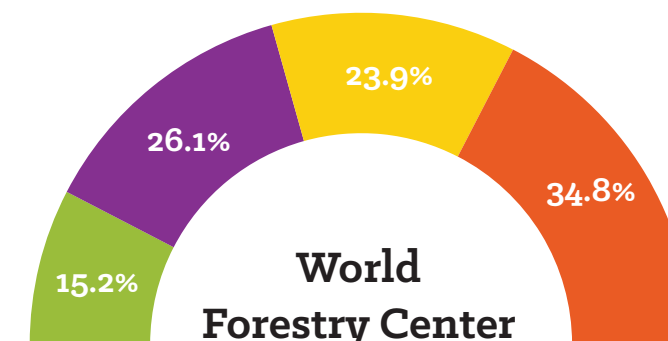
MODES
How did they get here?

VISITOR MODE SPLITS

79.4% 🚗

8.0% 🚌

6.8% 🥾

5.8% 📱

Mode split by location ■ Private Automobile ■ Transit ■ Active ■ Ride Service / Other

Location	Private Automobile	Transit	Active	Ride Service / Other
Oregon Zoo	89.4%	6.9%		2.4% / 1.2%
Japanese Garden	67.5%	8.5%	11.9%	11.9%
Rose Garden	67.4%	10.8%	11.3%	10.3%
Hoyt Arboretum	66.6%	17.5%	5.2%	10.5%
World Forestry Center	76.1%	14.2%		9.5%
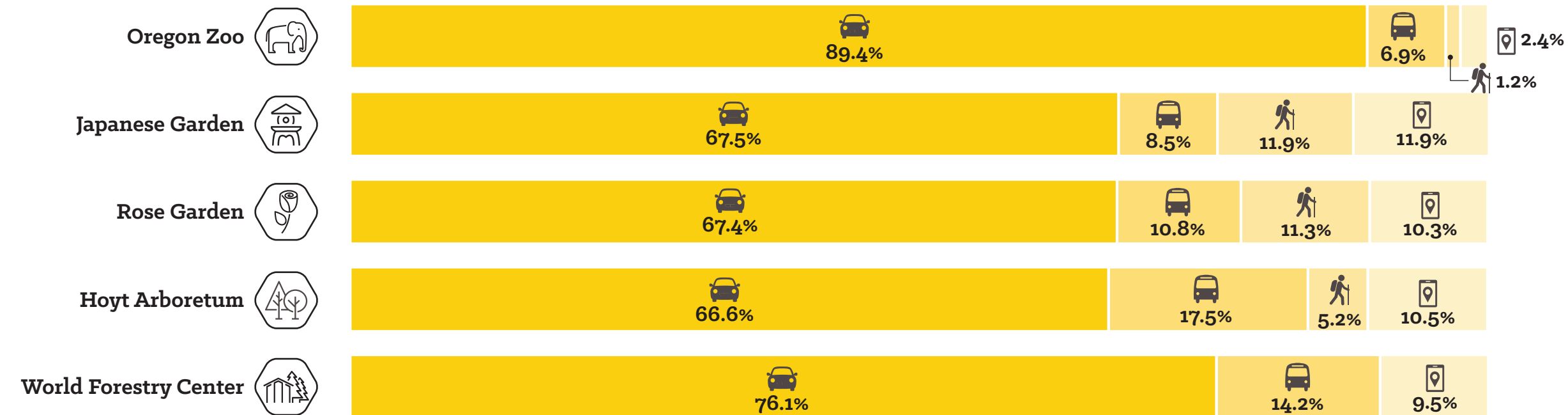
MODE SPLIT DETAILS

Passengers Per Vehicle

🐘	Oregon Zoo	3.45
🏯	Japanese Garden	2.93
🌹	Rose Garden	2.99
🌲	Hoyt Arboretum	2.43
🏛	World Forestry Center	2.31

Mode split by location ■ Private Automobile ■ Transit ■ Active ■ Ride Service / Other

Location	Private Automobile	Transit	Active	Ride Service / Other
Portland Metro	86.0%	6.8%	6.4%	0.8%
Oregon & Washington	90.0%	6.1%	1.6%	2.4% / .7%
U.S.A.	66.2%	11.7%	9.1%	13.0%
International	46.2%	15.4%	35.9%	2.6%
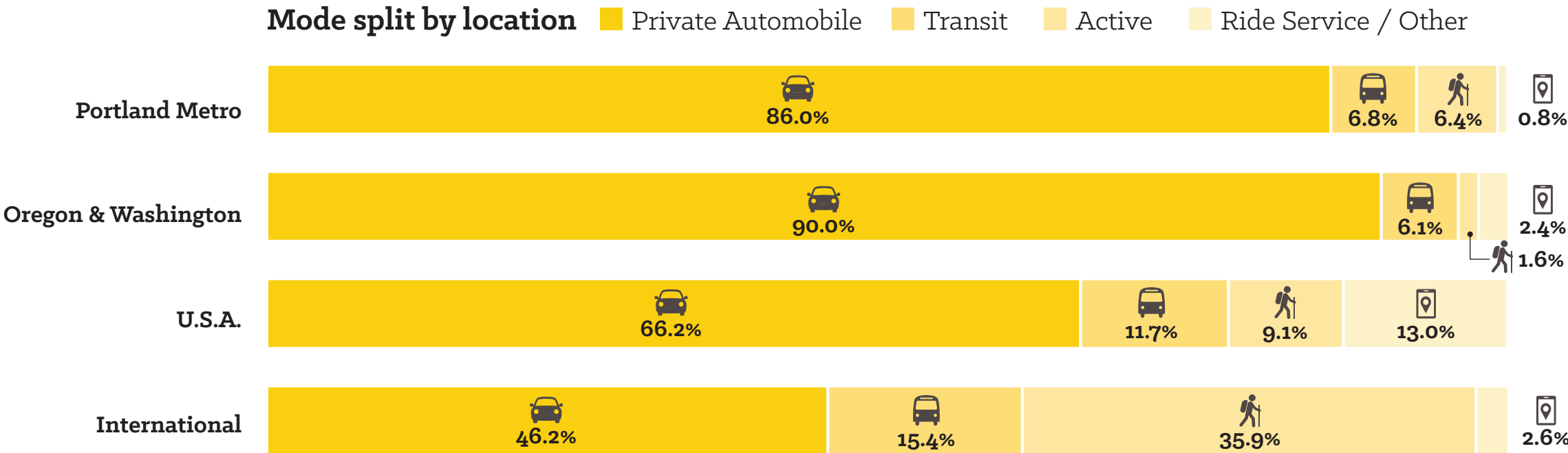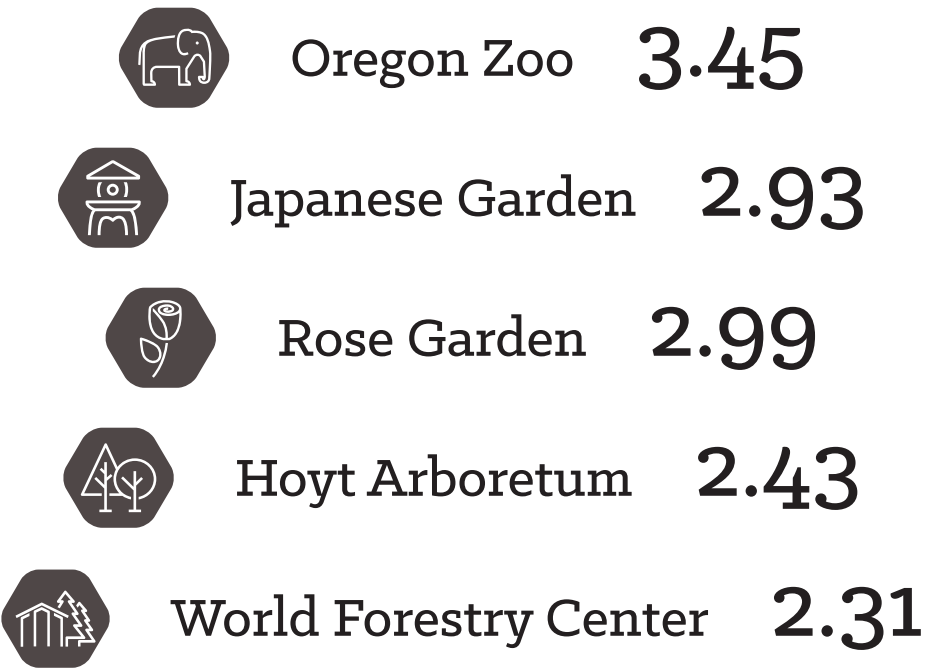
MODE SPLIT BASED GROUP TYPE

Private Auto	Transit	Active	Ride Service & Other

Adults only

Private Auto	Transit	Active	Ride Service & Other
68.2%	11.2%	10.2%	10.4%

Groups with Children (1-17 years old)

Private Auto	Transit	Active	Ride Service & Other
90.6%	4.9%	3.3%	1.2%

Member

Private Auto	Transit	Active	Ride Service & Other
88.2%	6.4%	4.7%	.7%

Non Member

Private Auto	Transit	Active	Ride Service & Other
77.0%	8.4%	7.4%	7.2%
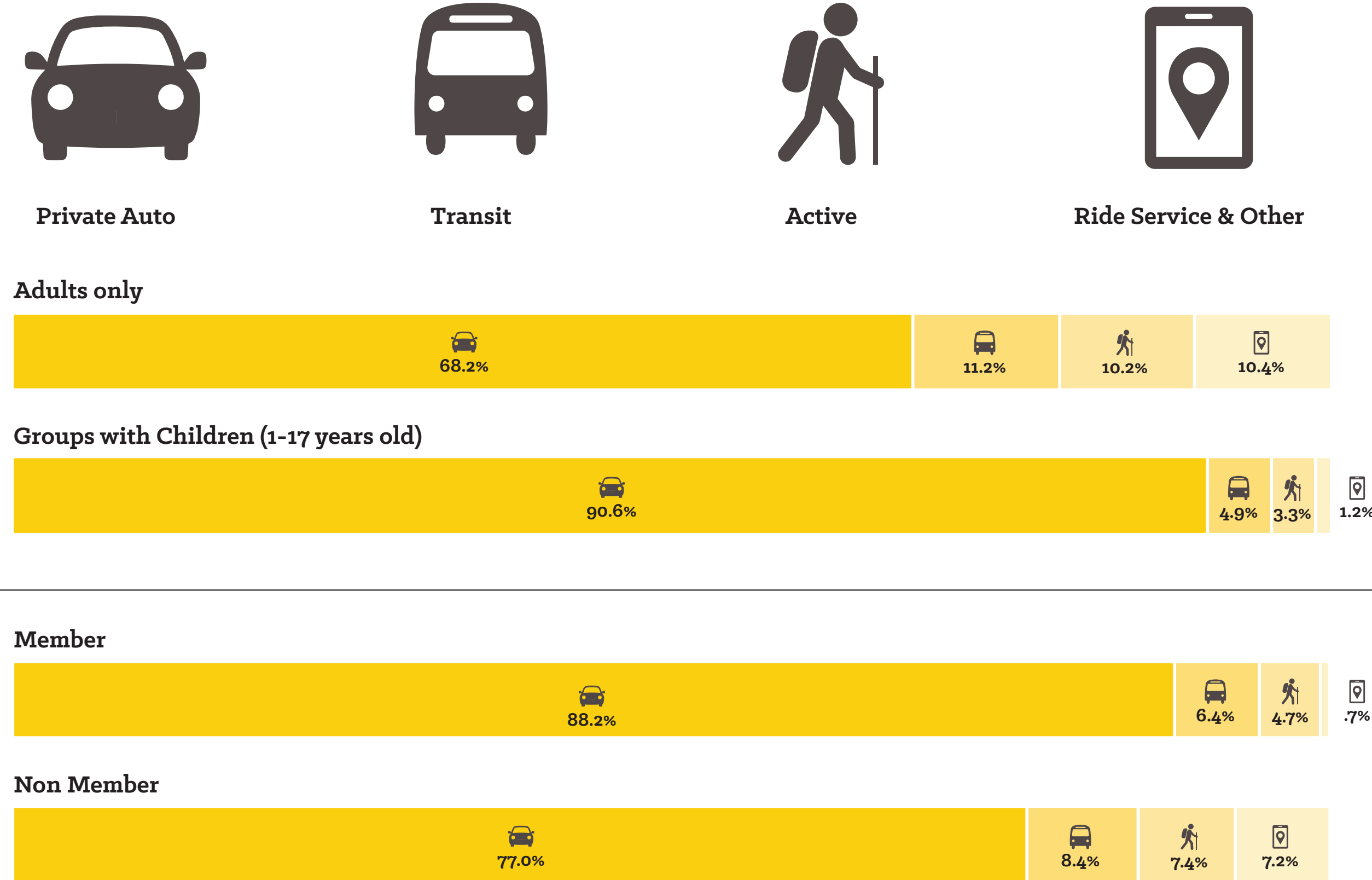
TRENDS

How are things changing?

MODE SPLIT TO THE PARK

2014 2015 2016 2017 2018 2019 2020 2021 2022

Private Auto

81% 77% 67% 63% 62% 67% 82% 75% 79%

2014 .... 2018 2022

Transit

13% 16% 17% 22% 21% 20% 7% 12% 8%

2014 .... 2018 2022

Active

5% 4% 8% 7% 8% 6% 9% 9% 7%

2014 .... 2018 2022
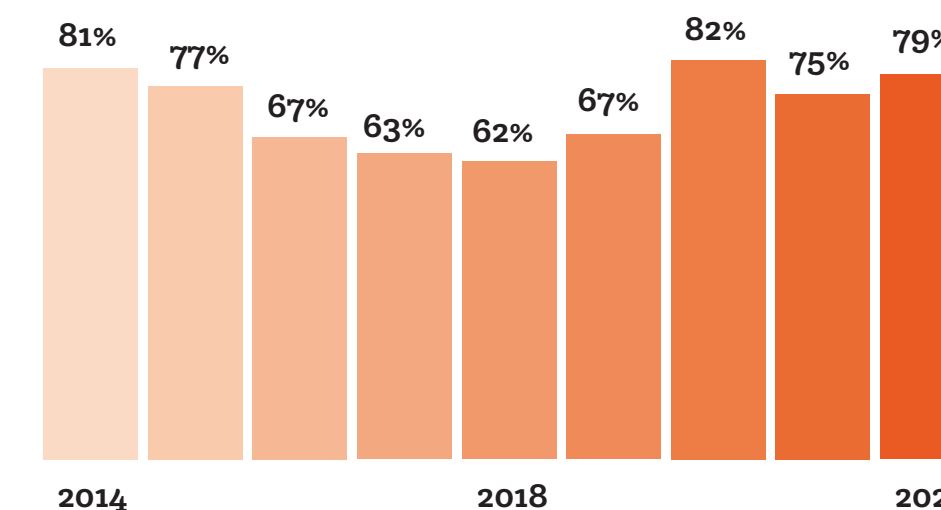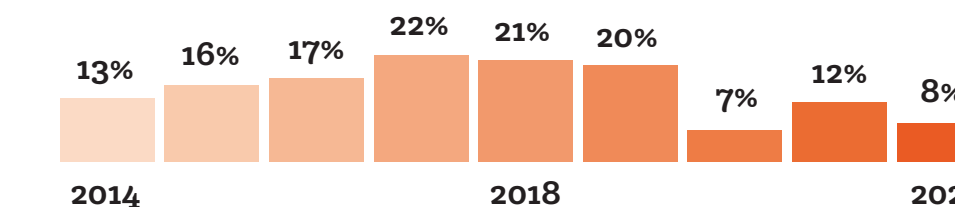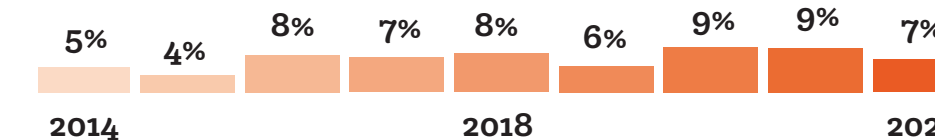
Ride Share and Other

1% 4% 9% 8% 10% 7% 2% 3% 6%

2014 .... 2018 2022
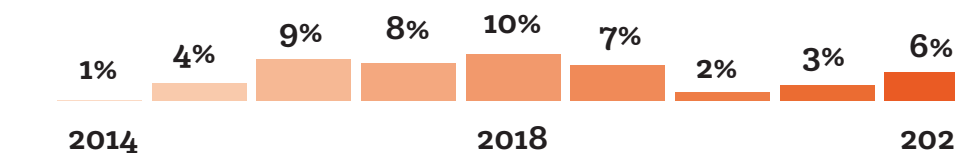
MODE SPLIT WITHIN THE PARK

2014 2015 2016 2017 2018 2019 2020 2021 2022

Private Auto

2014				2018				2022
17%	23%	26%	18%	26%	20%	32%	29%	30%

Transit

2014				2018				2022
12%	18%	24%	22%	20%	17%	8%	14%	12%

Active

2014				2018				2022
70%	57%	46%	59%	52%	62%	60%	57%	57%

Car Share and Other

2014				2018				2022
1%	1%	4%	2%	2%	40%	.30%	.20%	1%
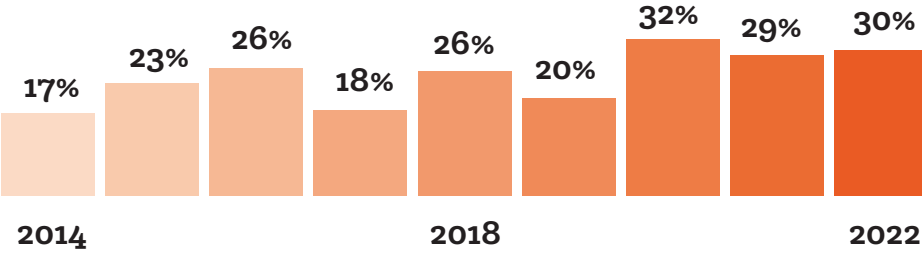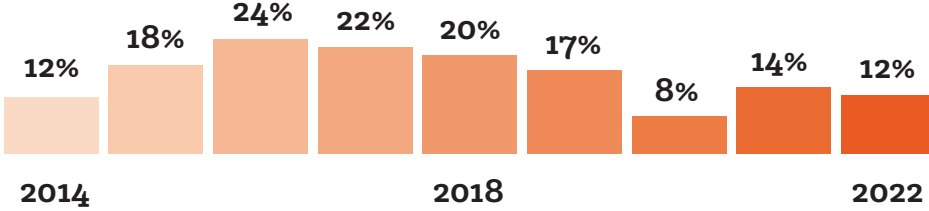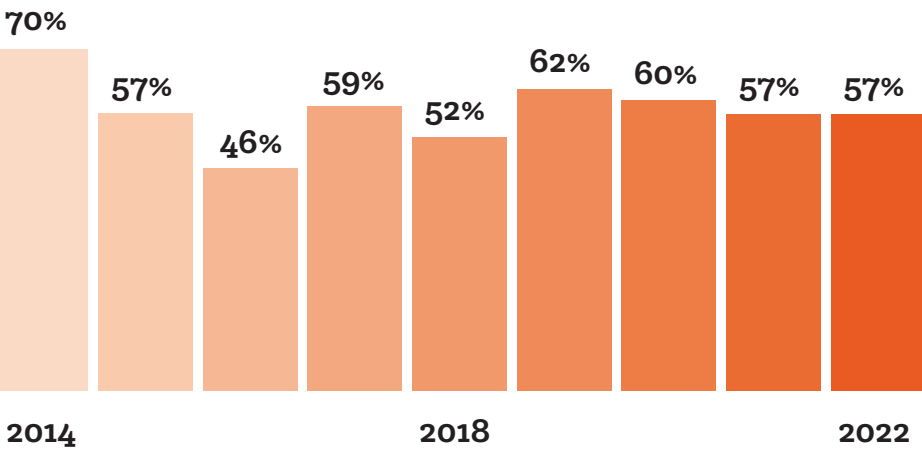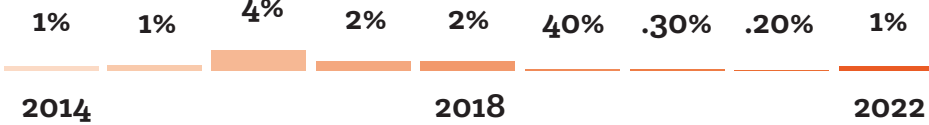
PARK TRENDS

Peak Season Free Shuttle Ridership

2015	2016	2017	2018	2019	2020	2021	2022
76,841	107,898	99,904	86,816	93,214	3,309	46,271	64,981
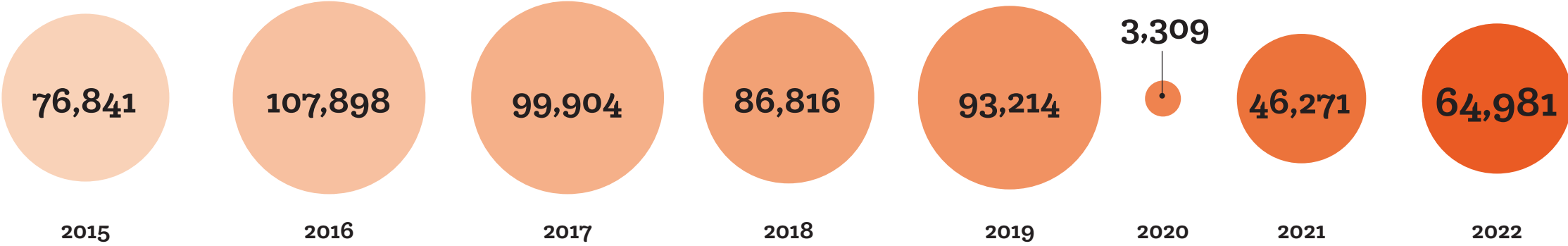
Park Visitors Visiting More Than One Location

Year	%
2014	31.2%
2015	43.0%
2016	46.8%
2017	54.8%
2018	60.5%
2019	60.3%
2020	41.4%
2021	57.1%
2022	48.6%

TRENDS

TRENDS

2014 2015 2016 2017 2018 2019 2020 2021 2022

Frequency of Visit

First Time

45.9% 43.1% 44.0% 48.8% 52.8% 47.2% 20.9% 47.8% 34.3%

Infrequently

23.1% 33.3% 37.8% 38.0% 36.6% 37.8% 46.0% 35.3% 49.0%

Frequent

29.4% 21.3% 18.4% 13.2% 10.6% 15.0% 33.0% 16.9% 16.7%
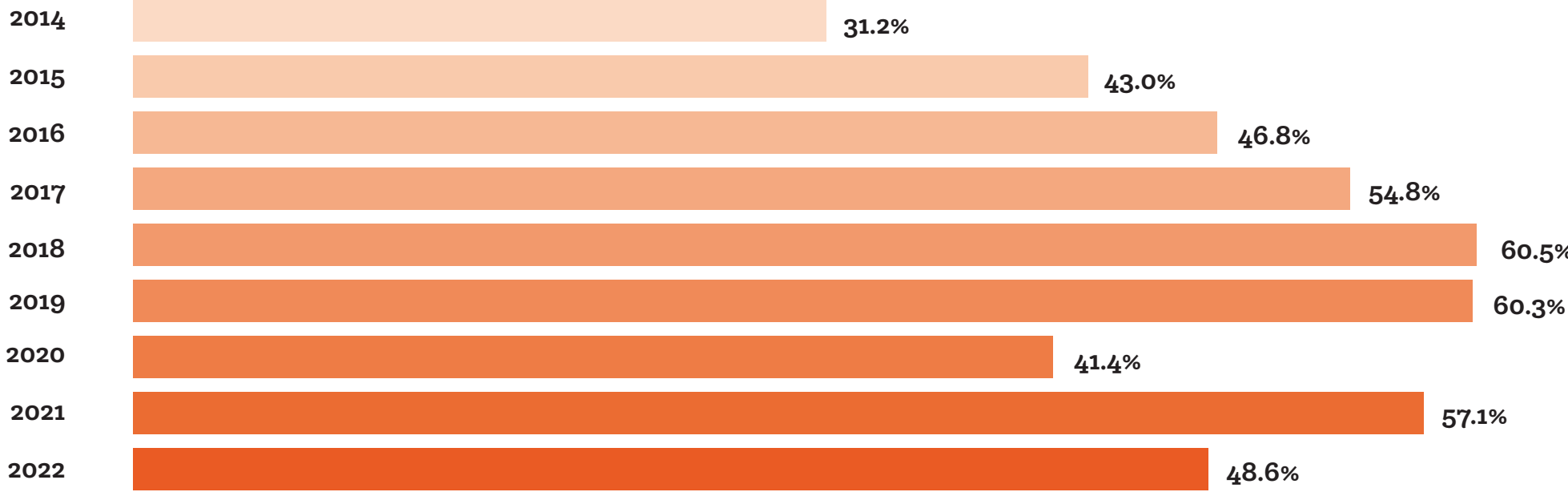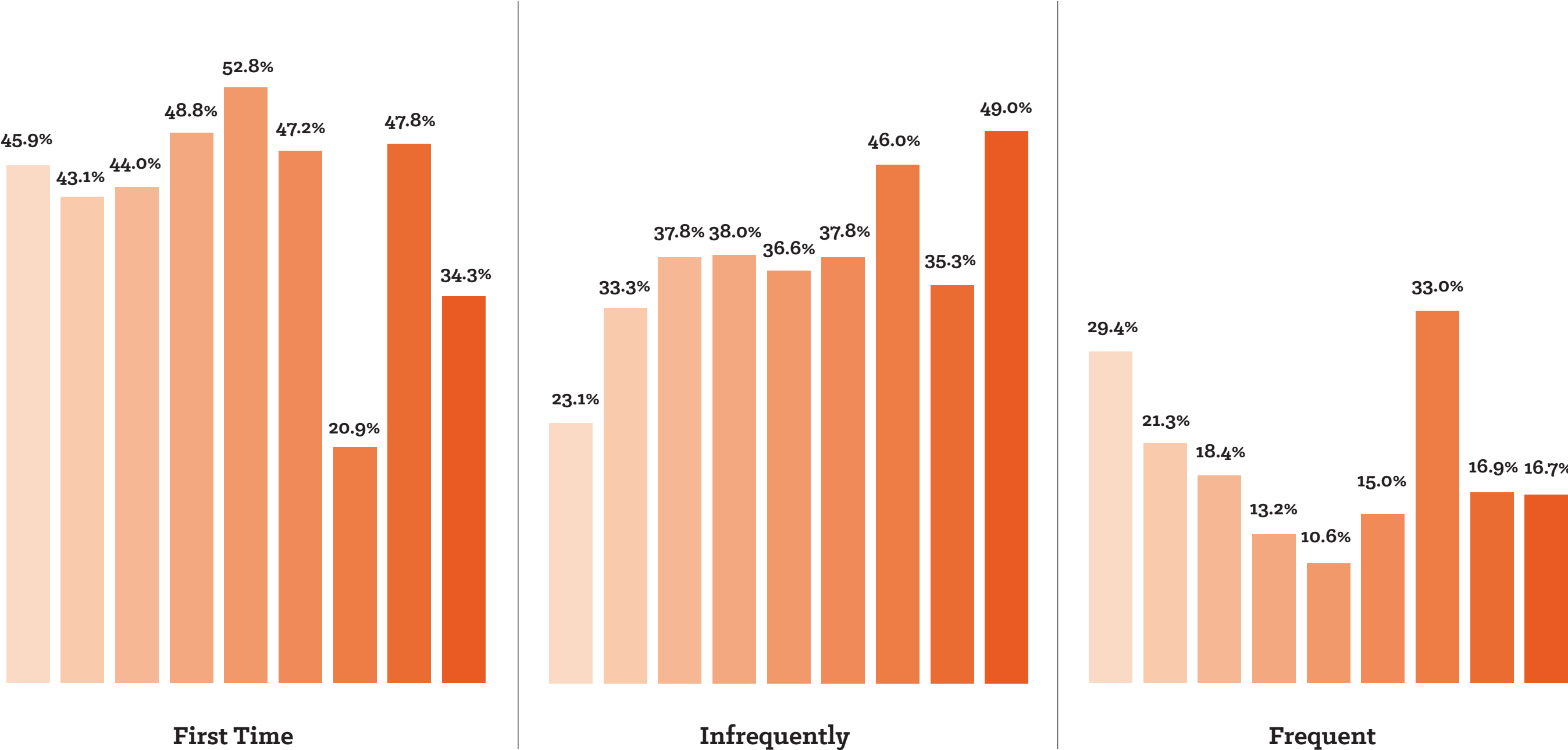
June - August

Offsite Bus Ridership Peak Season

2014   20,160
2015   13,367
2016   37,213
2017   31,746
2018   21,055
2019   20,055
2020   N/A
2021   303
2022   25,098

Total Peak Season Attendance

2014   1,028,368
2015   1,047,922
2016   1,078,654
2017   1,172,025
2018   1,137,291
2019   1,282,836
2020   382,590 *July / Aug Only
2021   832,214
2022   873,580
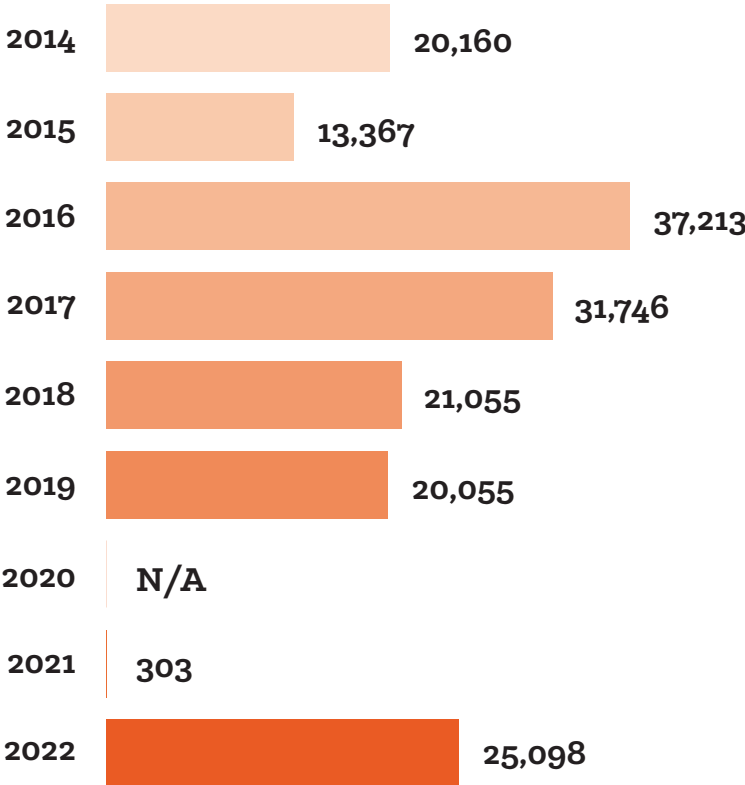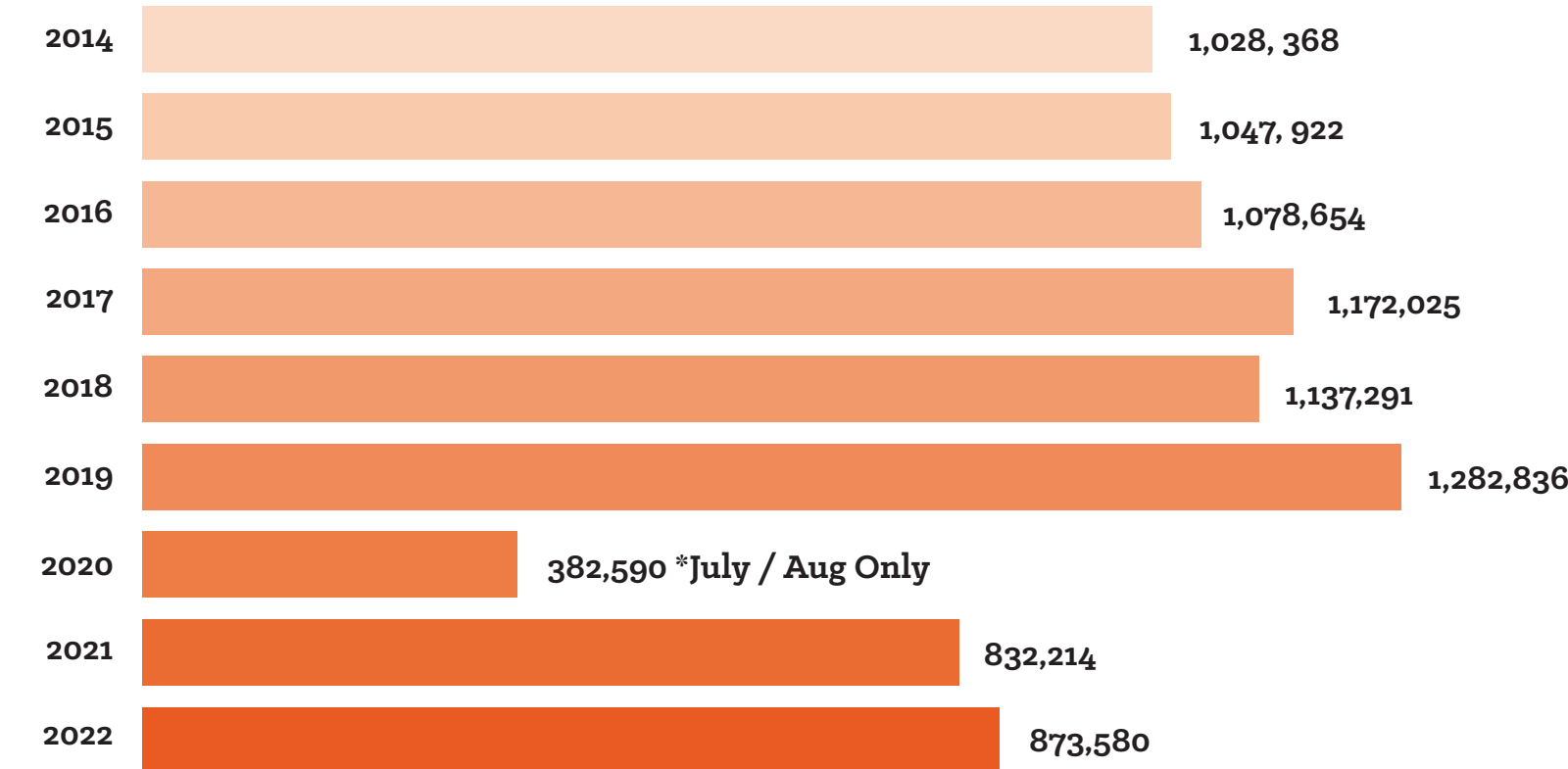
Parking June-August 2022

Average Parking Stay Time: North End **151 Minutes** South End (ABC + VVM + Hoyt) **293 Minutes**

Parking Transactions: North End **97,962** South End (ABC + VVM + Hoyt) **136,850**
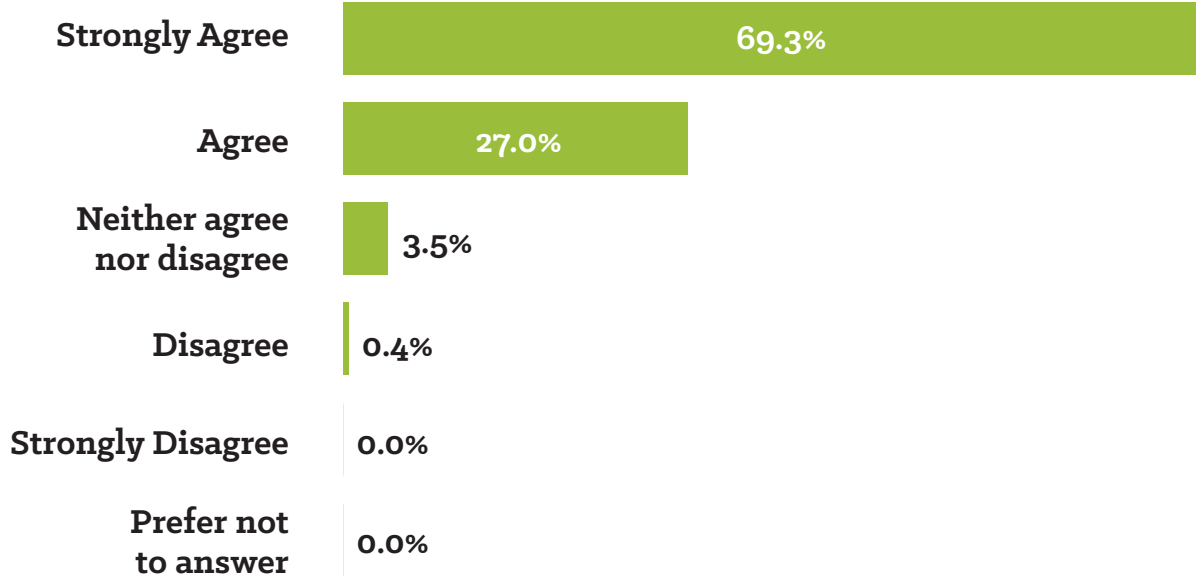
VISITOR EXPERIENCE AND ATTITUDES

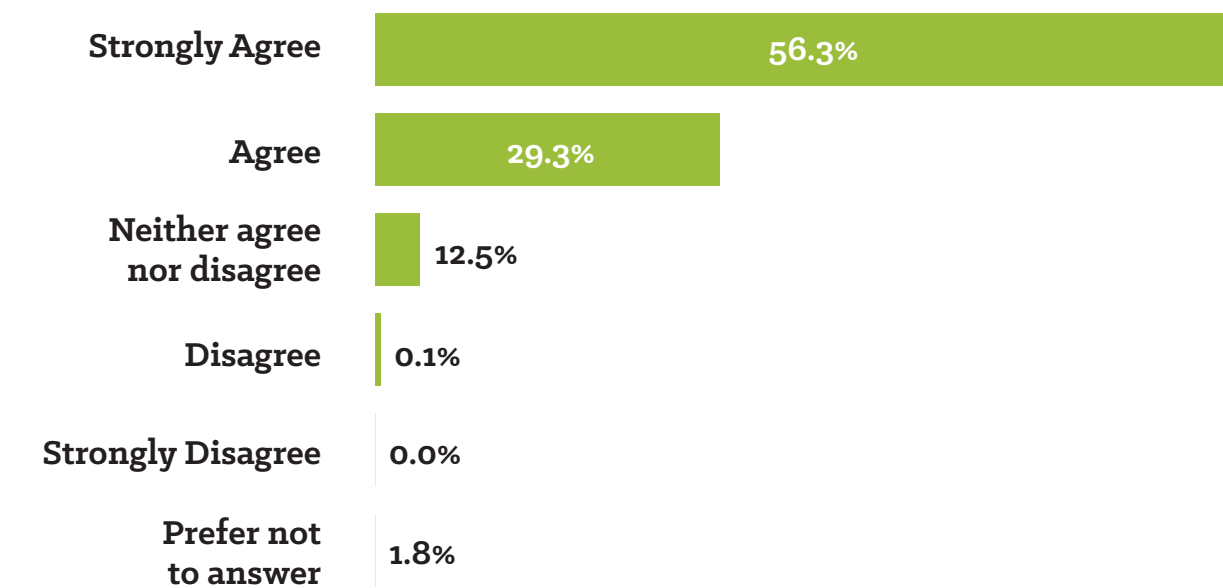*How are we serving our visitors?*

As noted in the Executive summary, three additional questions were added to this year's survey. They were developed, with the assistance of Four Forces consulting, to help us understand the experience of underserved audiences in the park, as well as to give us further insight into the impression all audiences have of park culture.
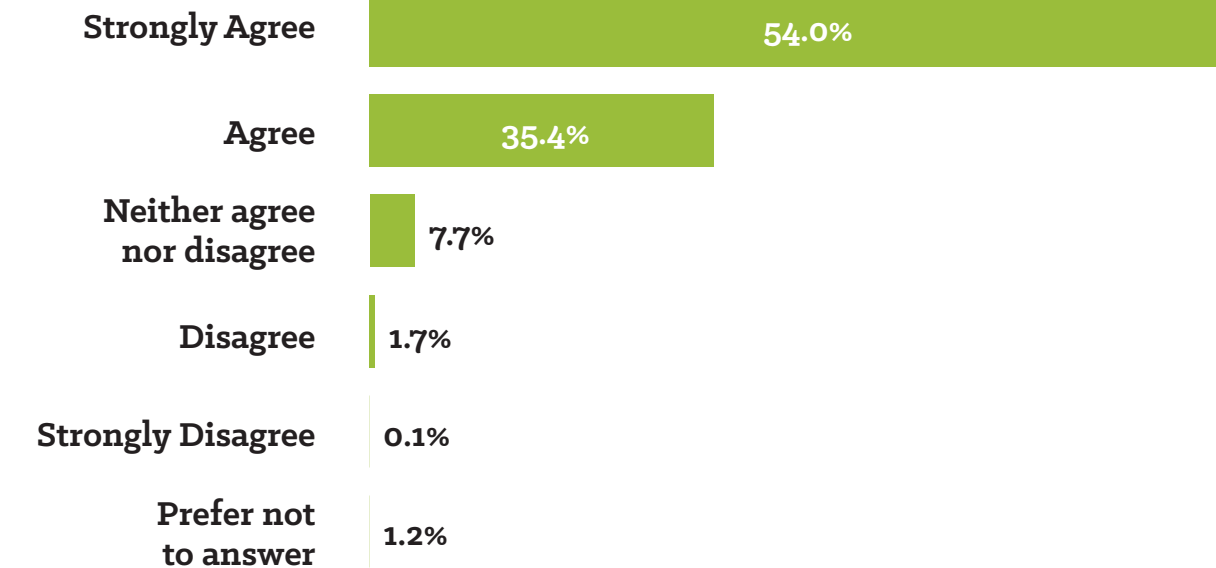
I feel Welcome here in Washington Park

Strongly Agree	69.3%
Agree	27.0%
Neither agree nor disagree	3.5%
Disagree	0.4%
Strongly Disagree	0.0%
Prefer not to answer	0.0%

Evaluate the statement: People of all backgrounds (race, ethnicity, sexual orientation, gender identity, ability, religion/spirituality, nationality and socioeconomic status) are treated with respect in Washington Park

Strongly Agree	56.3%
Agree	29.3%
Neither agree nor disagree	12.5%
Disagree	0.1%
Strongly Disagree	0.0%
Prefer not to answer	1.8%

I see different kinds of people (race, ethnicity, sexual orientation, gender identity, ability, religion/spirituality, nationality and socioeconomic status) visiting Washington Park.
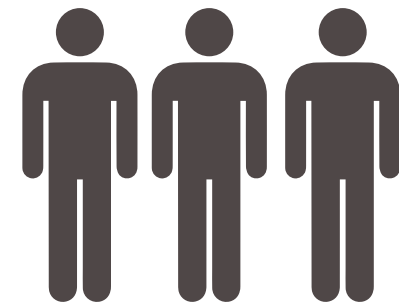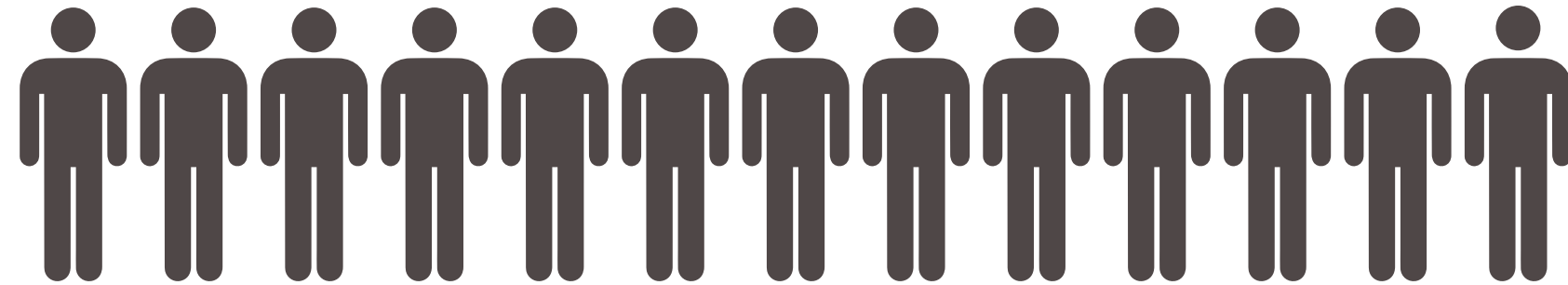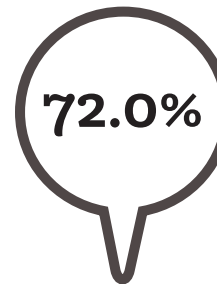
Strongly Agree	54.0%
Agree	35.4%
Neither agree nor disagree	7.7%
Disagree	1.7%
Strongly Disagree	0.1%
Prefer not to answer	1.2%

Free Shuttle Ridership

10.0%

18.0%

72.0%

Detractors

Passives

Promoters

Net Promoter Score **63** (200 point scale)

What is a Good Net Promoter Score?

-100

0

30

70

100

Needs Improvement
(-100–0)

Good
(0–30)

Great
(30–70)

Excellent
(70–100)

VISITOR
EXPERIENCE
AND
ATTITUDES

VISITOR
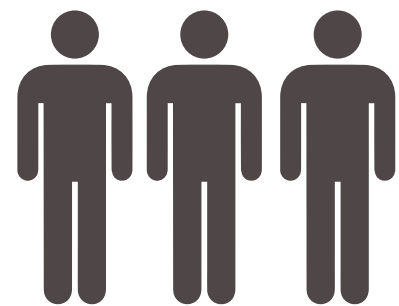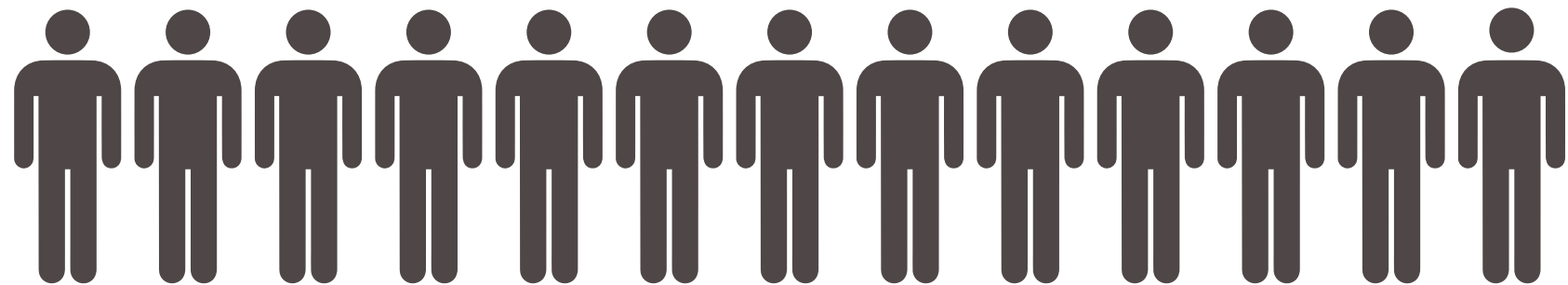EXPERIENCE
AND
ATTITUDES

Explore WASHINGTON PARK

How likely are you to recommend Washington Park to a friend?

7.0%

22.0%

72.0%
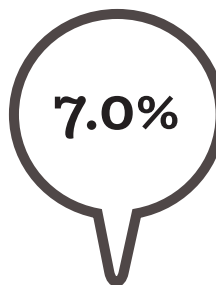
Detractors

Passives
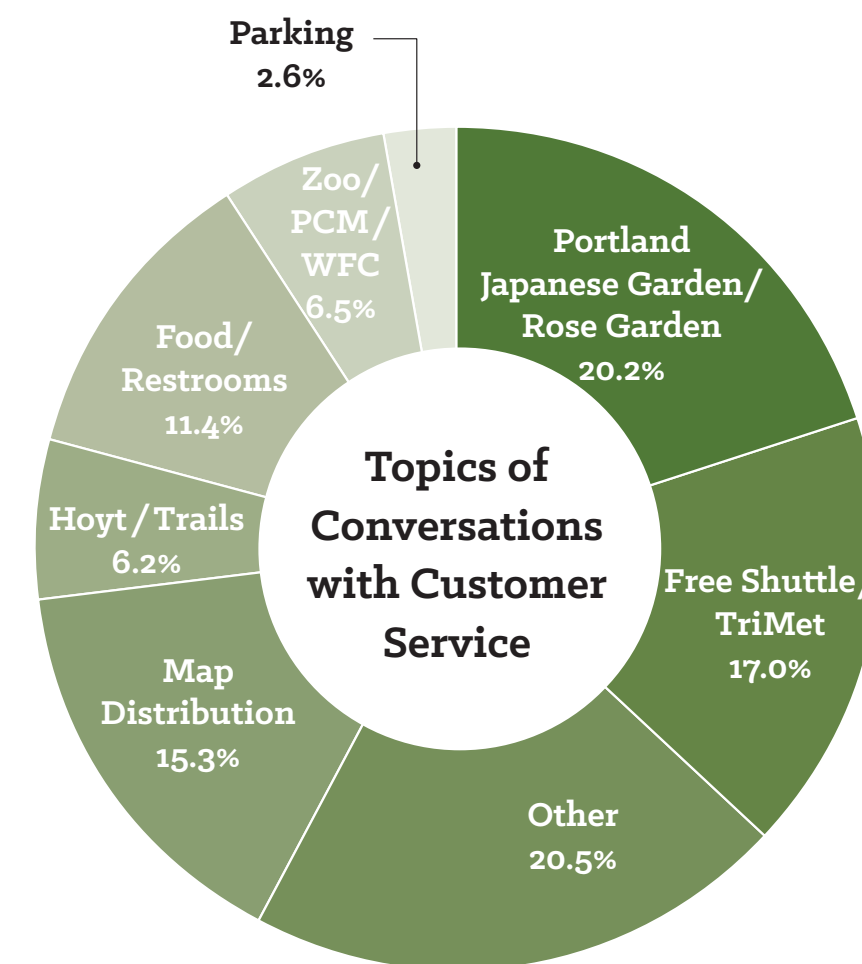
Promoters

Net Promoter Score **65** (200 point scale)

What is a Good Net Promoter Score?

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100

Needs Improvement
(-100–0)

Good
(0–30)

Great
(30–70)

Excellent
(70–100)

Staff greeted *37,554* park visitors in peak season

and handled *687* phone/internet requests.

Total of *38,241* customer service interactions

Topics of Conversations with Customer Service

- Parking 2.6%
- Zoo/PCM/WFC 6.5%
- Portland Japanese Garden/Rose Garden 20.2%
- Food/Restrooms 11.4%
- Free Shuttle/TriMet 17.0%
- Hoyt/Trails 6.2%
- Map Distribution 15.3%
- Other 20.5%

VISITOR EXPERIENCE AND ATTITUDES

Annual Transportation Report

WASHINGTON PARK 2022

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