

Explore

WASHINGTON PARK

WASHINGTON PARK

2017 Visitor survey report



ACKNOWLEDGMENTS

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

Cynthia Haruyama, *Chair, Portland Japanese Garden*

Don Moore, *Vice Chair, Oregon Zoo*

Dave Malcolm, *Secretary, Sylvan Highlands Neighborhood Association*

Steve Cole, *Treasurer, at large member*

Chuck Wiley, *World Forestry Center*

Anna Goldrich, *Hoyt Arboretum*

Inessa Vitko, *TriMet*

Mike Abbaté, *Portland Parks & Recreation*

Allison Duncan, *Arlington Heights Neighborhood Association*

Ruth Shelly, *Portland Children's Museum*

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.

EXPLORE WASHINGTON PARK STAFF

Heather McCarey, Executive Director

Lewis Kelley, Program Manager

Jessica Van Raden, Operations Manager

PORTLAND PARKS & RECREATION STAFF

Victor Sanders, Program Specialist

Throughout 2017, the Portland Water Bureau worked on the Washington Park Reservoir Improvement Project at the north end of the Park. Ongoing construction meant the Park Place entrance to Washington Park was closed all year and 10% of the available parking was unavailable. This impacted access to Washington Park, internal traffic flow, and parking capacity and likely had an impact on the results of this year's survey.



Explore



WASHINGTON PARK

Explore Washington Park (EWP) 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.

EWP was formed in 2013 as a Transportation Management Association and operates as a 501(c)3 non-profit with a license agreement with the City of Portland for transportation management in the Park.

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, 1549 visitor surveys were collected in multiple languages including English, Spanish, German, Japanese, and Russian. The data from these surveys give us a snapshot of conditions in the Park during the peak season of June, July, and August. This report is intended to provide a high level look at transportation behavior of Washington Park visitors to help the EWP staff and board plan for future transportation needs and programs.

Surveys were conducted with temporary staff across six of the major institutions within the bounds of the Park including:

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

The survey is part of a series of surveys conducted throughout the peak season that targets visitors, employees, and volunteers in the Park. 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.

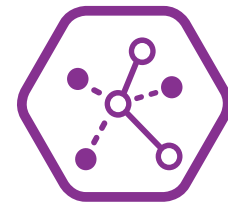


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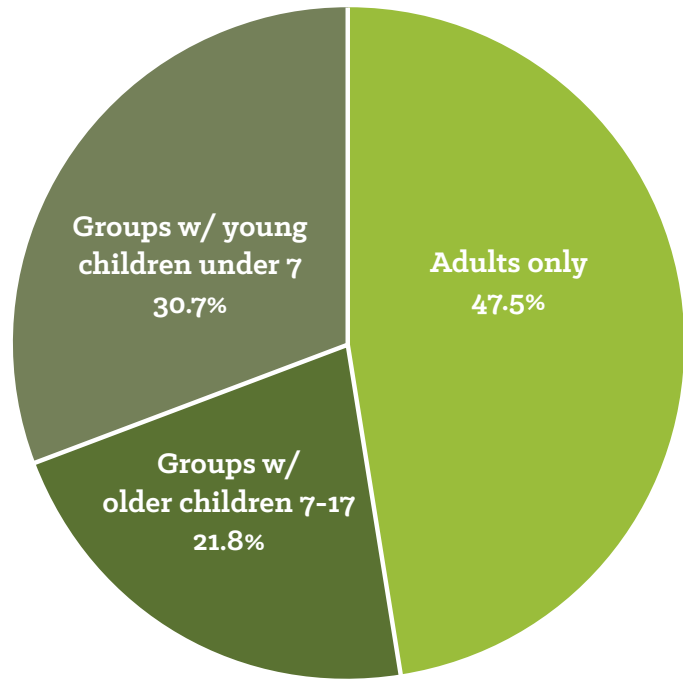
VISITOR PROFILES

*Who's coming to
the park*

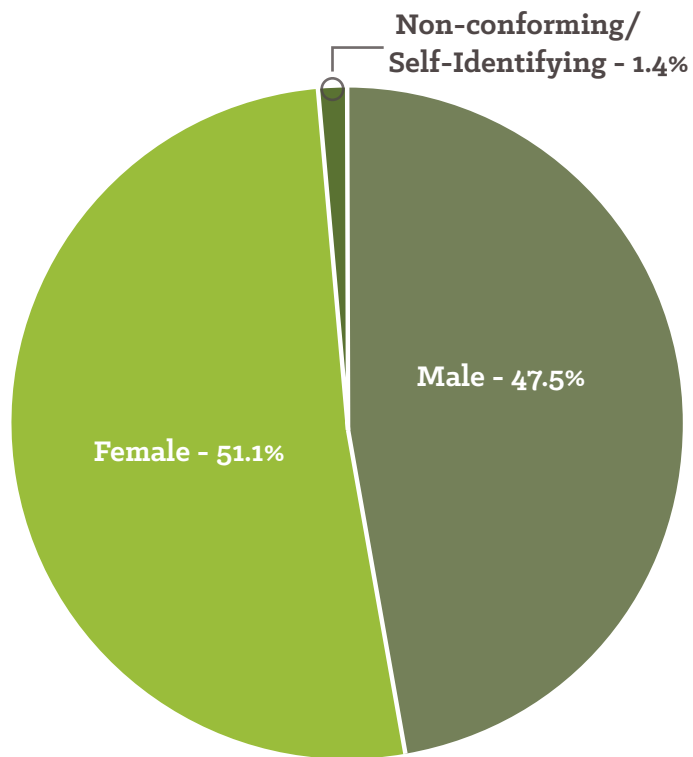


VISITOR PROFILES

Group Makeup:



Gender:

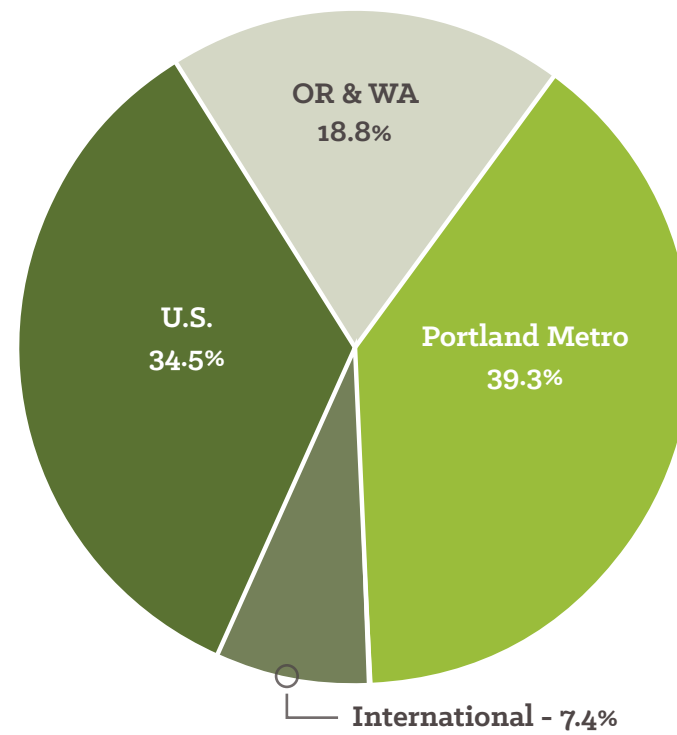


Peak Season Visitors:

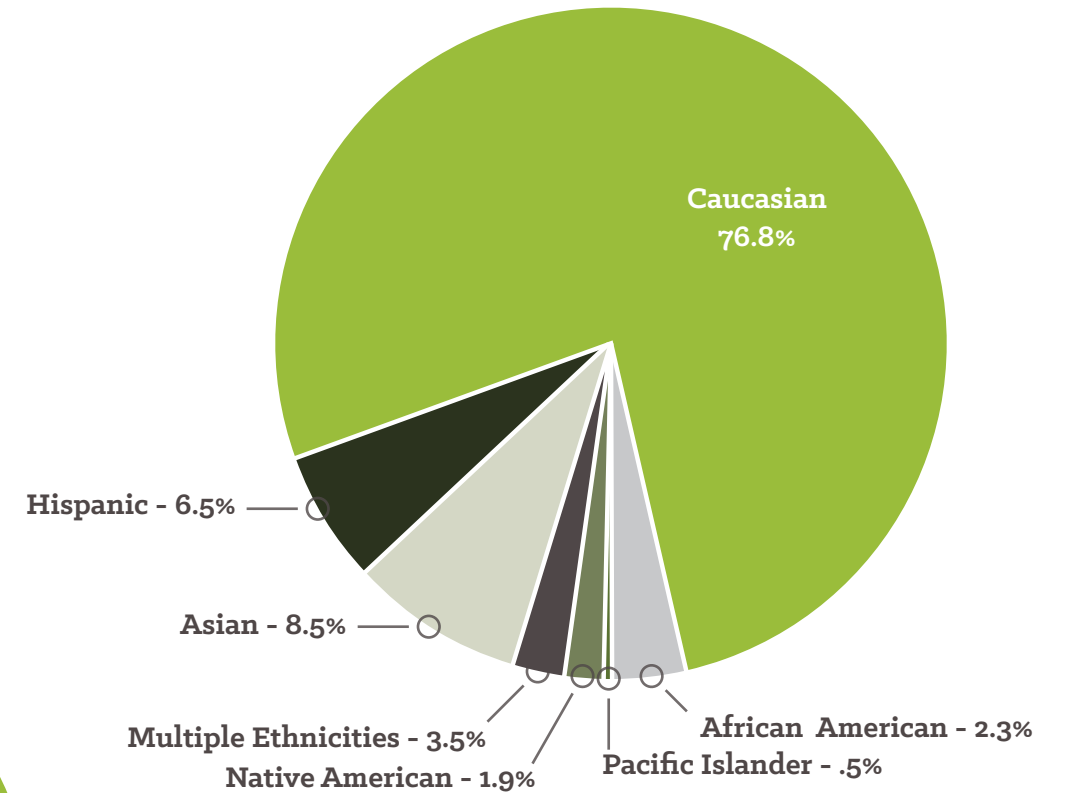
June - August

1.2 Million

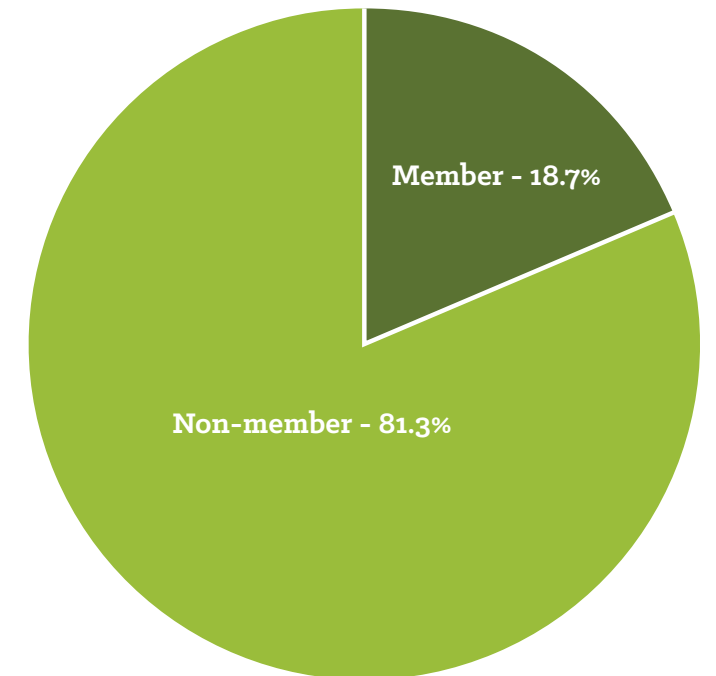
Regional Origin:



Race & Ethnicity:



Membership:



VISITOR GROUP PROFILES

With 3.2 million annual visitors, Washington Park is a major attraction for both local residents and tourists visiting from other states and from around the world. The unique mixture of cultural institutions inside the Park brings to Washington Park a wide swath of people from different backgrounds, cultures, and demographics.

Presented here are five unique visitor profiles revealed through analysis of the survey data. Each of these groups - women with children, large family and friends groups, park neighbors, friends and couples, 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.

FEMALE + CHILDREN



Women with young children come mostly from the Portland Metro area.

MOST VISITED VENUES



63%

Children's Museum



24%

Oregon Zoo



31% are members of the Children's Museum



20% visit the Park a few times per month or more



take transit 40% less than the average Park visitor



drive to the Park 30% more than the average Park visitor

LARGE FAMILY / FRIENDS GROUP



Groups of four or more people come mainly from the suburbs around the City of Portland.

MOST VISITED VENUES



64%

Oregon Zoo



27%

Rose Garden



80% are visiting with children



64% visit just one attraction



take transit 36% less than the average Park visitor



drive to the Park 27% more than the average Park visitor



VISITOR PROFILES



VISITOR PROFILES

PARK NEIGHBORS



Washington Park neighbors live close to the Park in SW and NW Portland.

MOST VISITED VENUES



37%



31%

Hoyt Arboretum

Rose Garden



37% are members of a venue



30% are over the age of 55

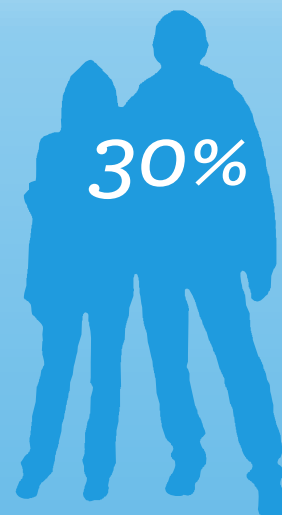


more than twice as likely than the average Park visitor to bike or walk to the Park



drive to the Park 15% less than the average Park visitor

COUPLES / FRIENDS



Groups of two are mainly tourists from outside the Portland Metro.

MOST VISITED VENUES



60%



50%

Rose Garden

Japanese Garden



use the shuttle at a rate 25% more than the average Park visitor



25-34 year olds make up the largest age group visiting without children



visitors without children take transit 20% more than the average Park visitor



drive to the Park 18% less than the average Park visitor

US / INTERNATIONAL TOURISTS



Visitors from outside Oregon and Washington increased by 21% compared with 2016.

MOST VISITED VENUES



61%



56%

Rose Garden

Japanese Garden



30% visit with children



twice as likely to take car share to the Park



take transit 10% more than the average Park visitor

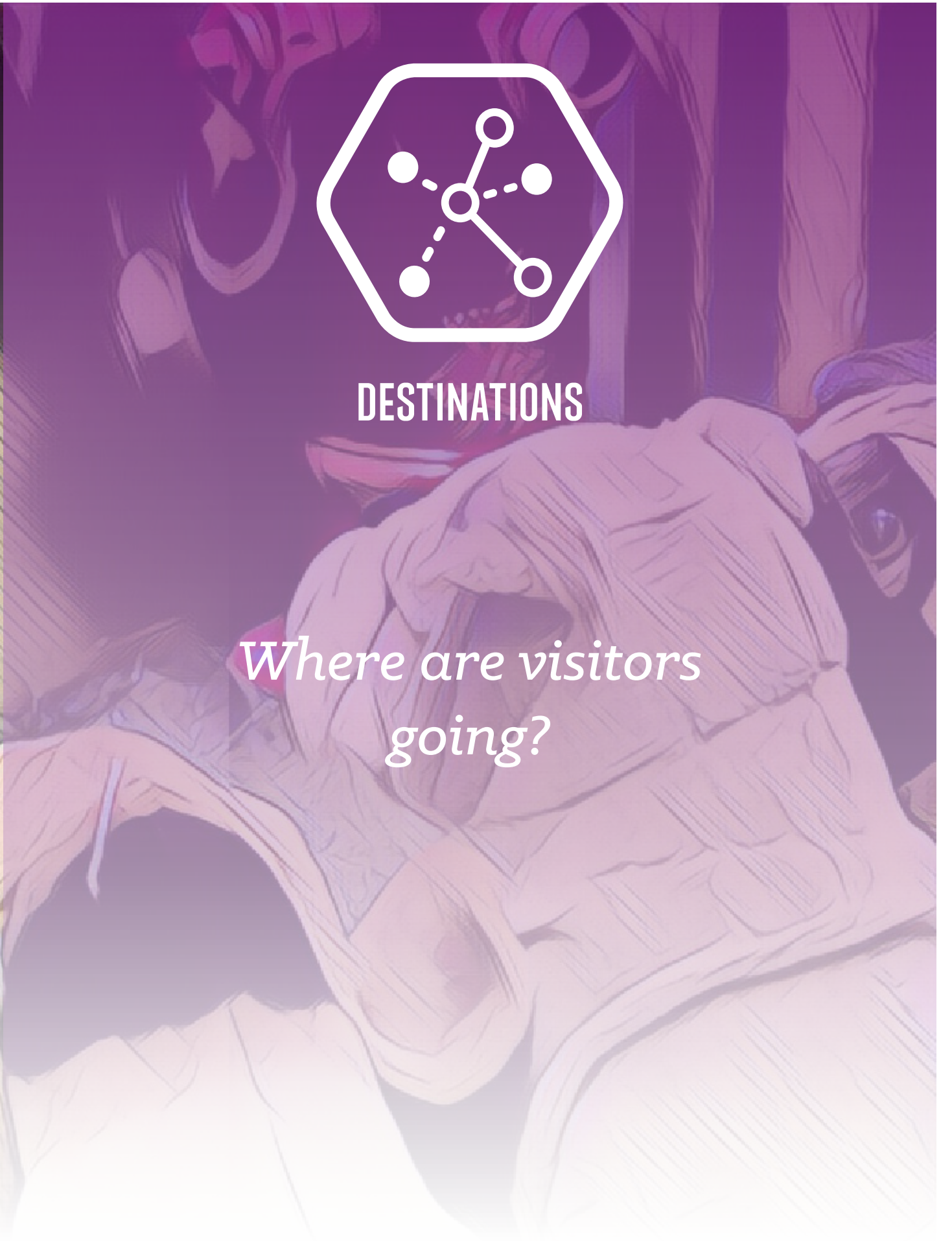


drive to the Park 22% less than the average Park visitor



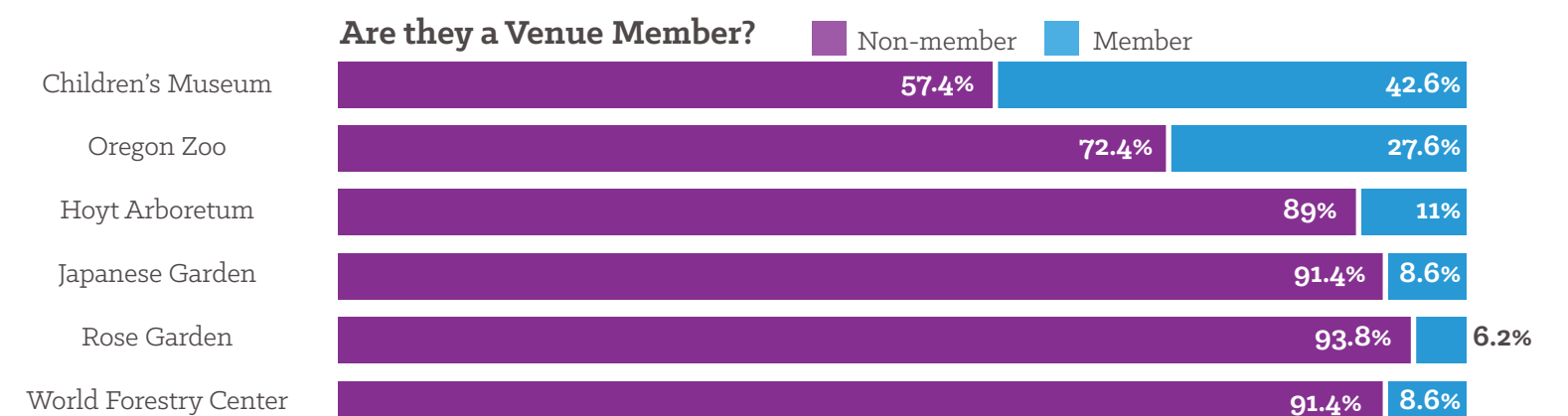
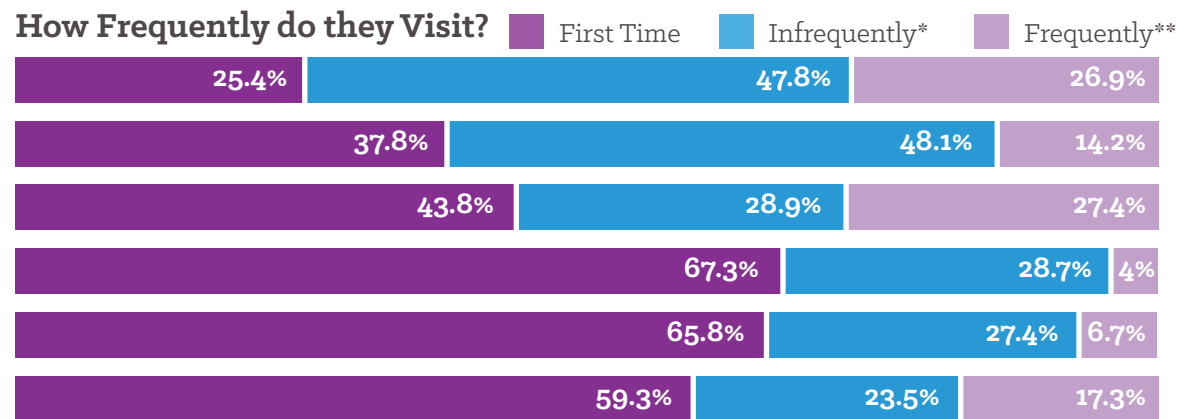
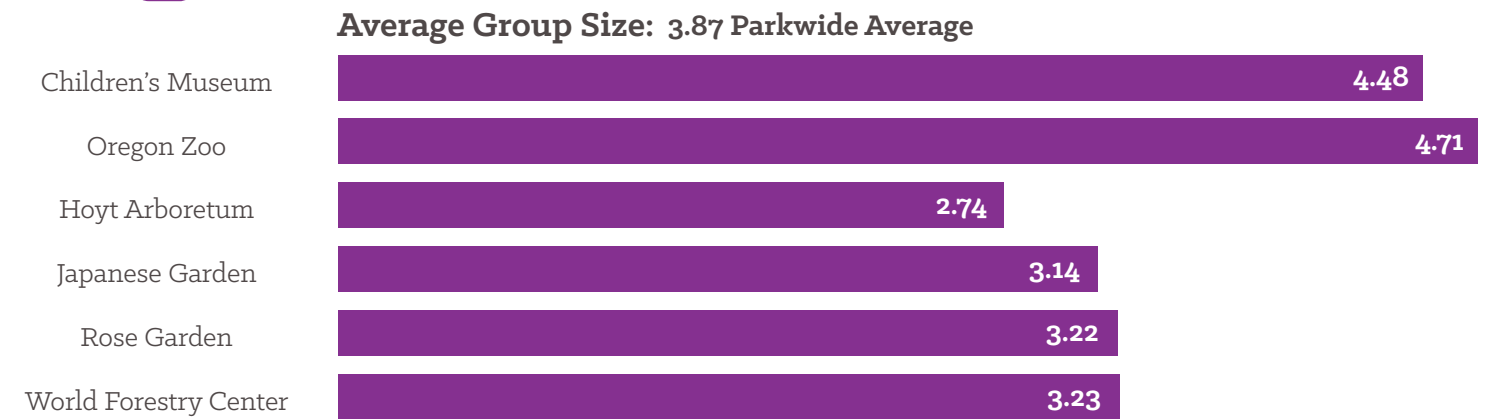
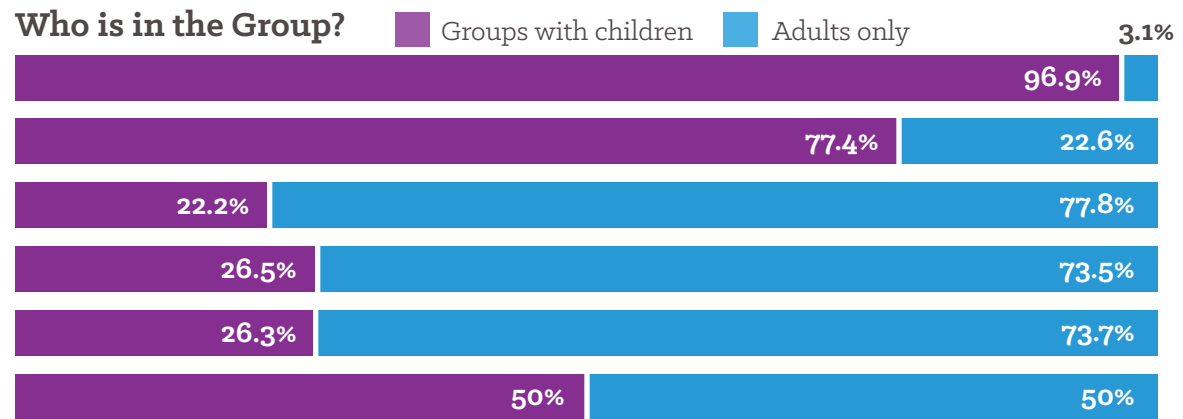
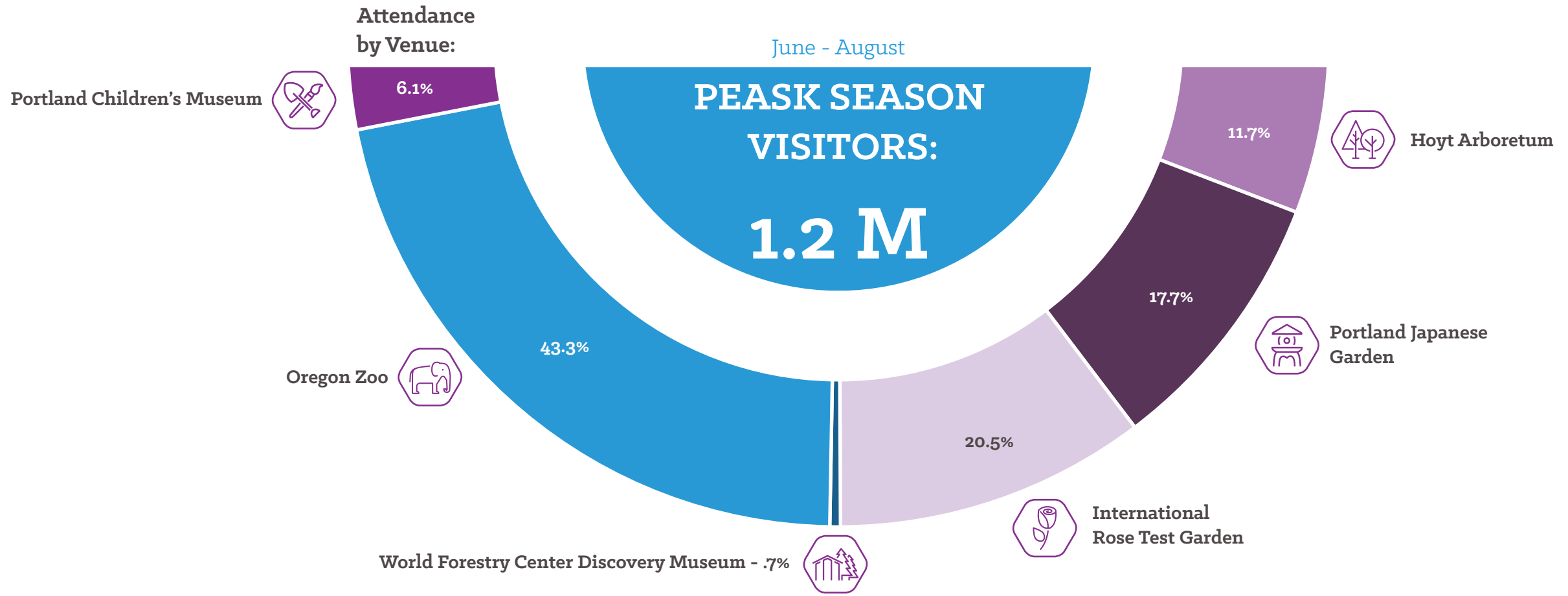
DESTINATIONS

*Where are visitors
going?*





DESTINATIONS



*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.

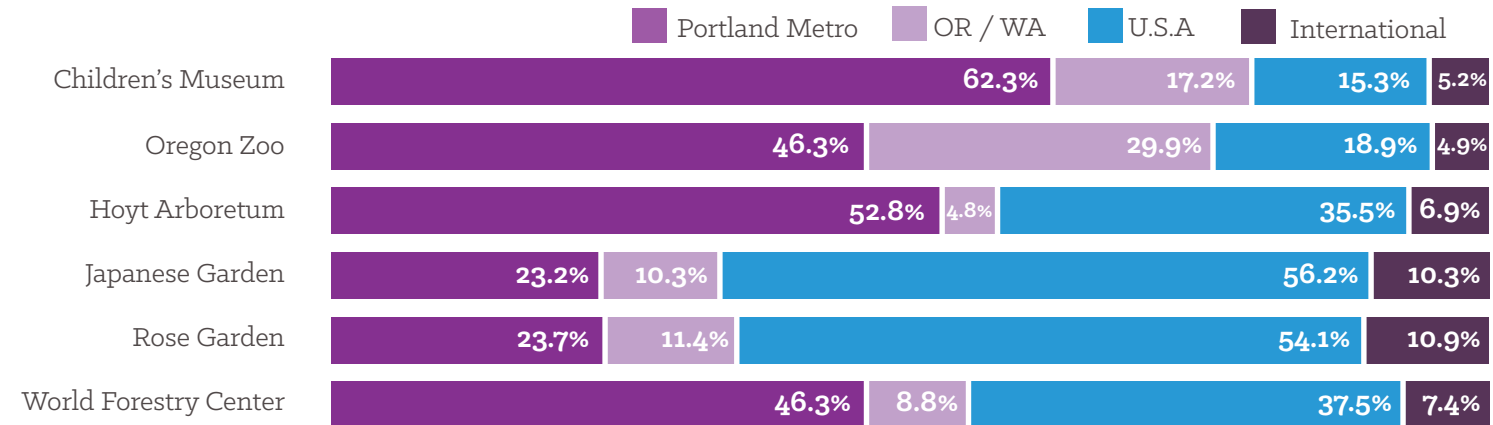
VISITOR DESTINATIONS

Each of the six cultural institutions draws a unique demographic of visitors into Washington Park and some of these details are brought to the surface in the graphs here.

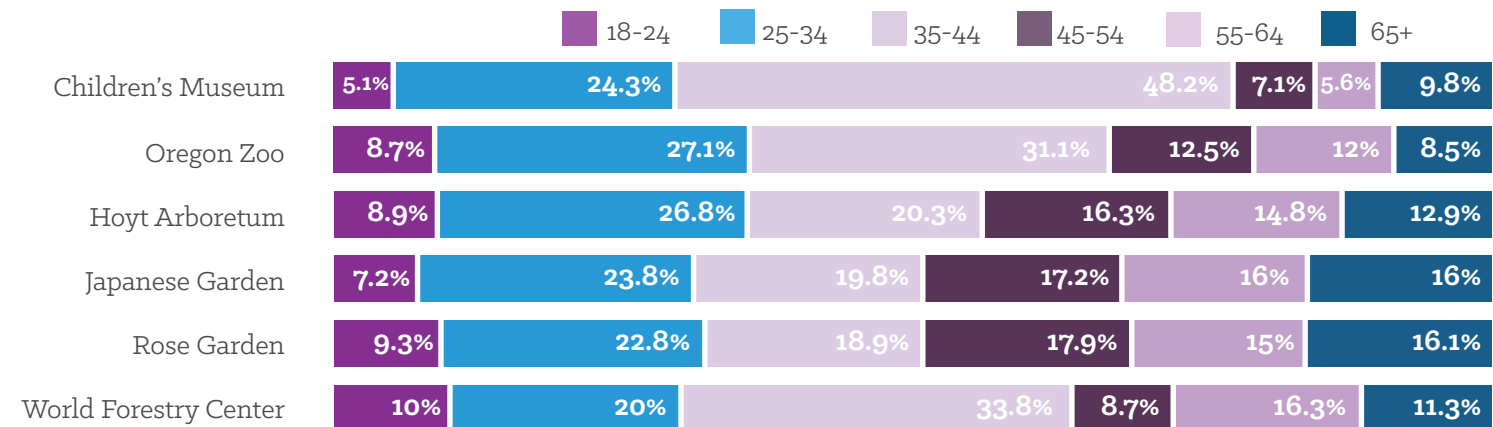
The largest draw for visitors to Washington Park is by far the Oregon Zoo, drawing approximately 1.7 million visitors annually, making up approximately 43% of all Park visitors. The Oregon Zoo and Portland Children's Museum have very similar visitor profiles; consisting of mainly larger groups with children, mostly visiting a single venue and drawn from the Portland Metro area. These two venues also feature the highest proportion of visitors that are members, consisting of between half and a quarter of daily visitors compared to under 10% for the rest of the venues.

The remaining venues, Hoyt Arboretum, Japanese Garden, Rose Garden, and World Forestry Center also share similar visitor profiles, predominately consisting of slightly smaller, adults only groups that visit less frequently and are more likely to be visiting from outside the Portland Metro area.

Where are they Coming From?



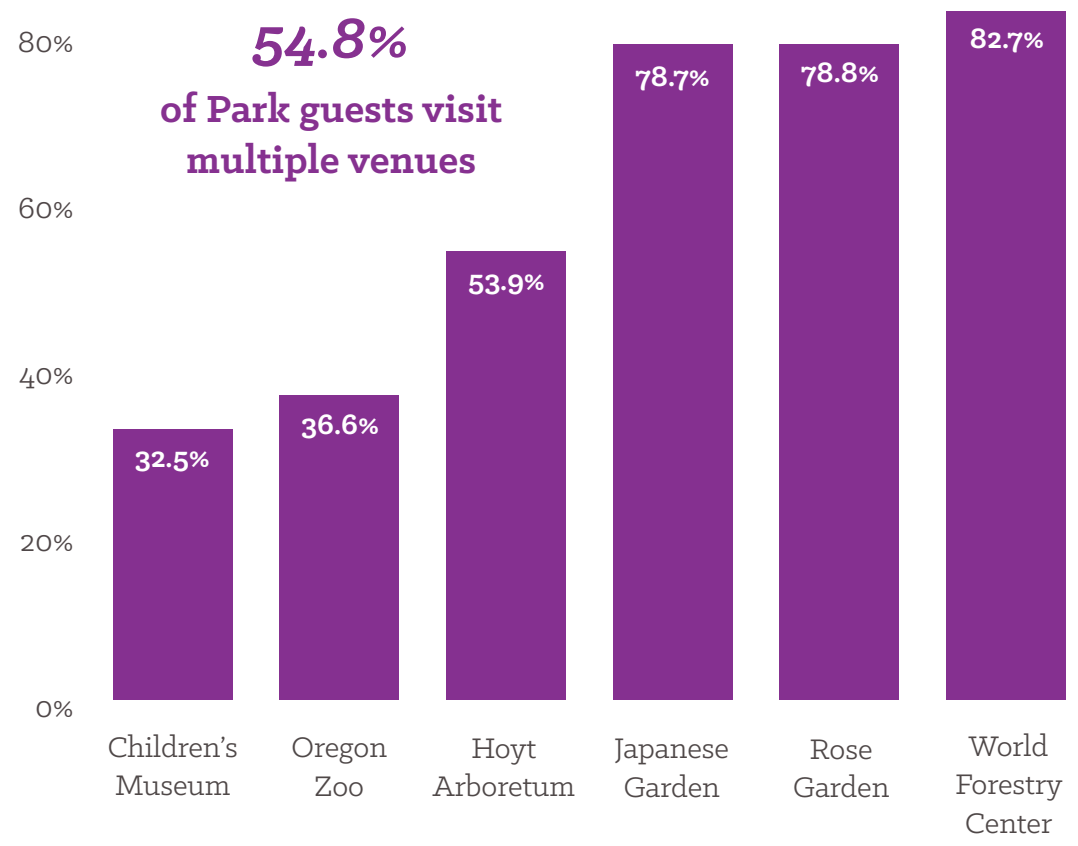
Survey Respondent Age:



DESTINATIONS



Visitors Attending Multiple Venues:

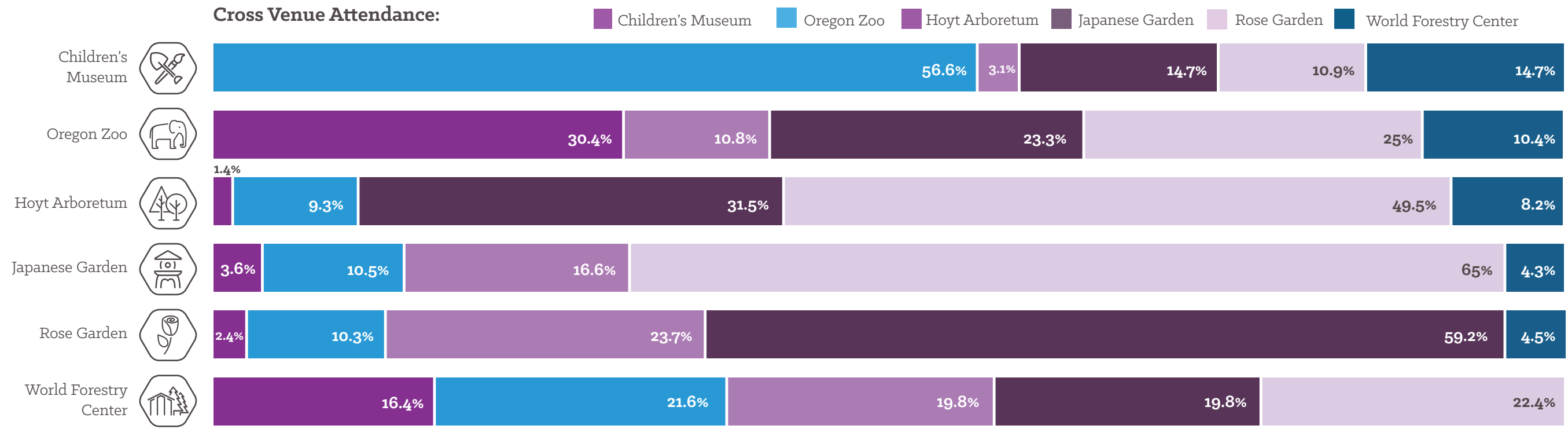


CROSS VENUE ATTENDANCE

The majority of guests visit multiple institutions when coming to Washington Park. Cross venue attendance patterns become very apparent upon examining the survey data, showing that specific cultural institutions have very strong connections between one another. Nearly 60% of all Children's Museum attendees visiting another institution choose to visit the Oregon Zoo, one of the strongest correlation 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 very tied to the two gardens with a combined 80% of Hoyt attendees also going to one of the two gardens but this relationship isn't reciprocal, with only about 20% of garden attendees also enjoying Hoyt Arboretum. 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.

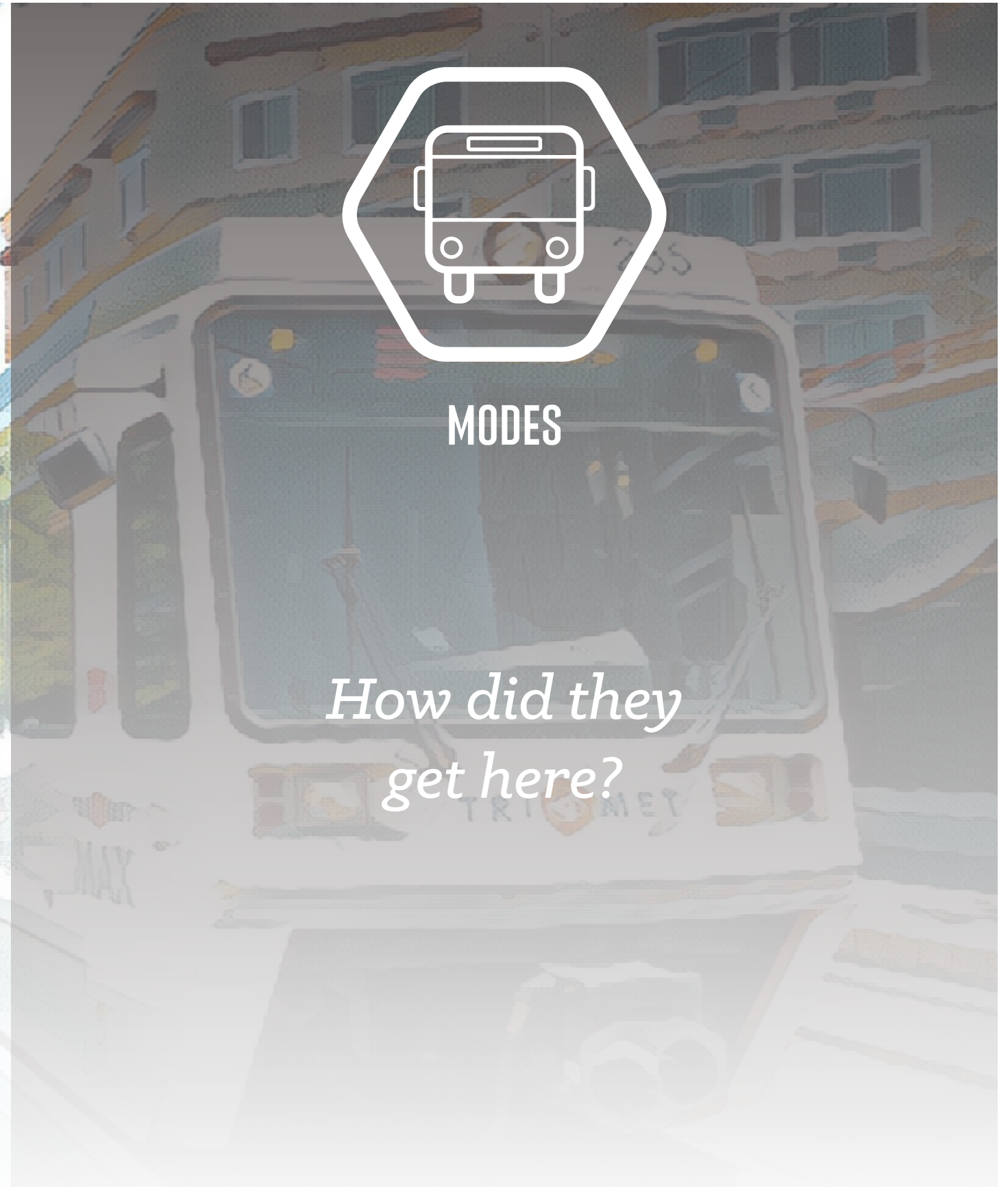
Cross Venue Attendance:





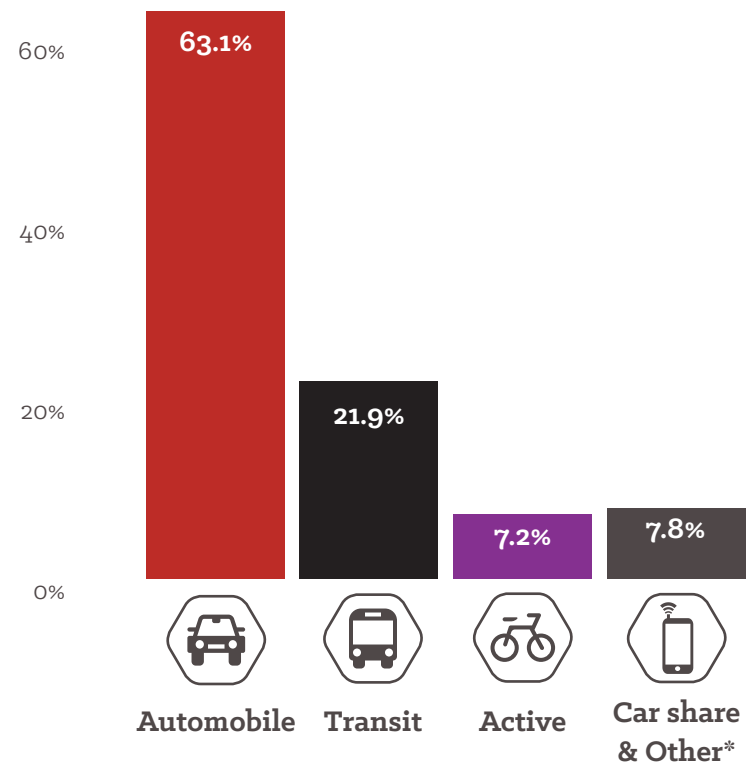
MODES

*How did they
get here?*





Mode-Split:



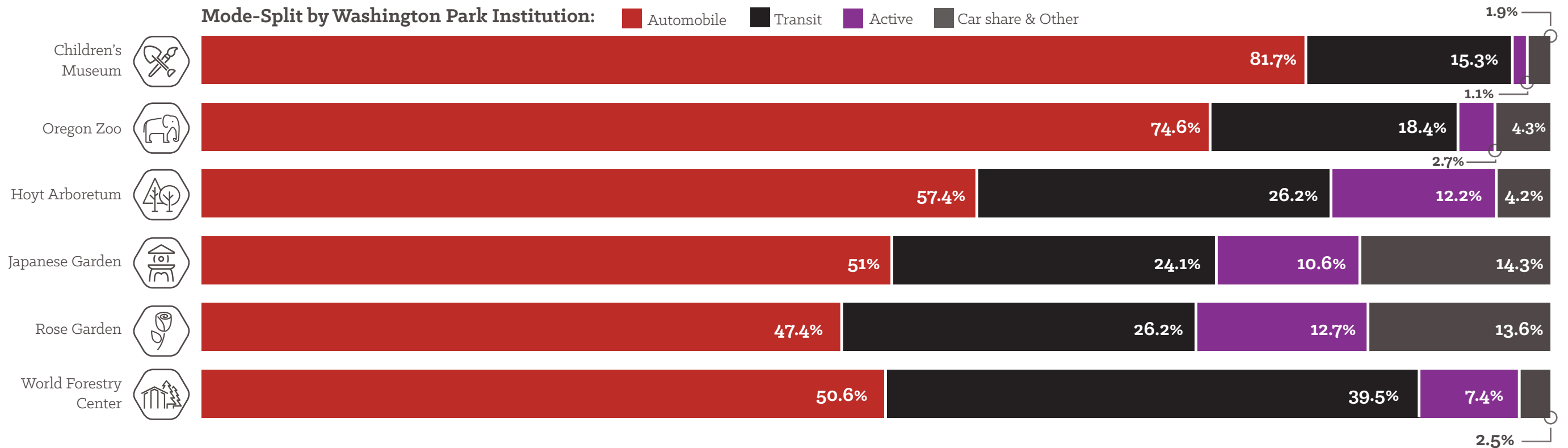
PARK VISITOR MODE SPLITS

The predominate mode for visiting Washington Park is the automobile, followed by transit, car share, and finally active modes such as walking and biking. The biggest institutional influence on mode-split is the Oregon Zoo, given that their guests represent nearly half of annual attendance. Other than the Portland Children’s Museum and Oregon Zoo, all institutions have a transit mode-split above 25%. Each institution exhibits unique mode-split patterns based on visitor demographics, visitor origins, and institution marketing. For example, the Portland Japanese Garden featured a pop-up message on their home page

on weekends during the summer telling visitors to expect limited parking and to explore other transportation options; this had a big impact on getting the institution’s auto mode-split down to around 50%.

The Portland Japanese Gardens, Rose Garden, and World Forestry Center have the lowest automobile mode-split thanks to the prevalence of tourist, higher percent of adult only visitors, and good 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.

Mode-Split by Washington Park Institution:



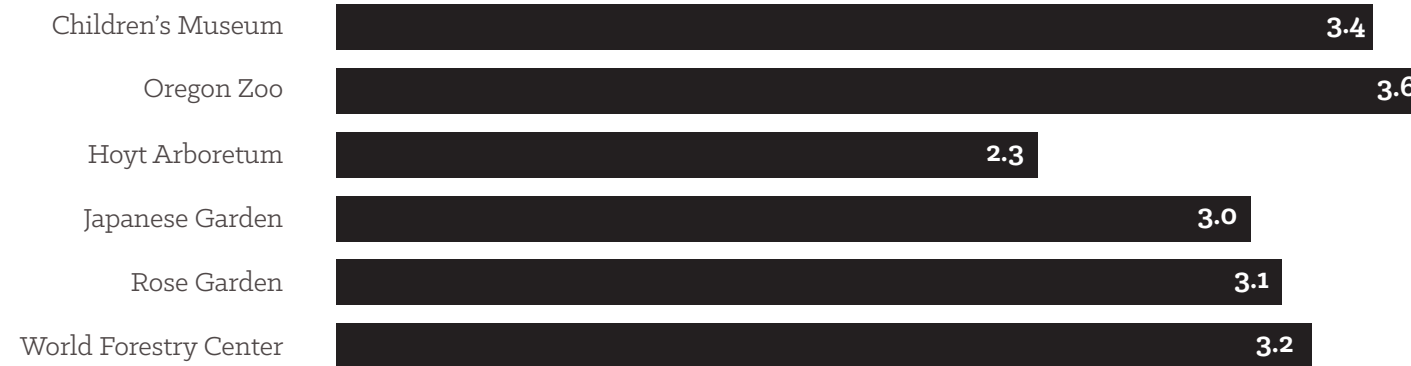
MODE SPLIT DETAILS

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.

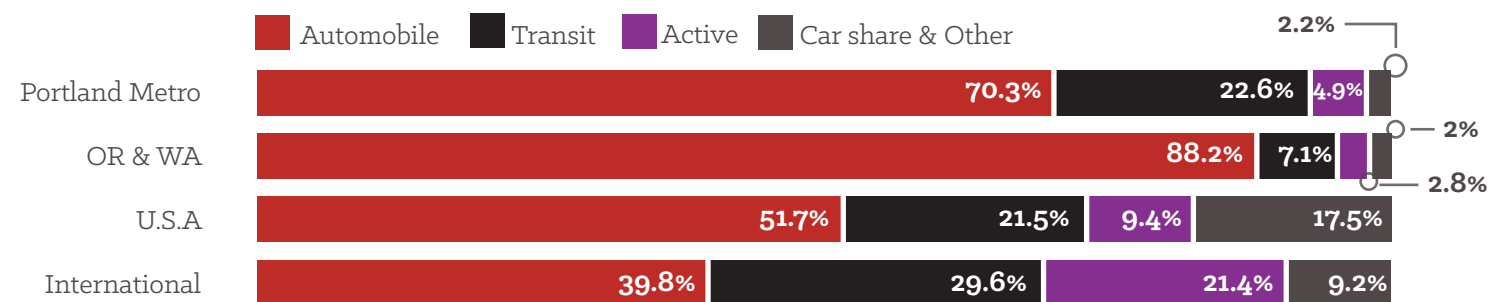
People living in Oregon and Washington but outside of the Portland Metro area are much more likely to drive to Washington Park compared with visitors from the United States or abroad. Tourists are more likely to take transit, car share, or walk. Frequency of visits also plays an important role, with first time visitors most likely being tourists and being less likely to have access to a car while in Portland.

One of the biggest factors in determining the transportation mode to the Park is the presence of children. Groups with children are almost twice as likely to drive, and take transit almost half as much compared with groups consisting of adults only. This correlation is stronger when a younger child (under 7 years old) is present compared with an older child (8 - 17 years old). A number of factors may be contributing to this fact, such as parents not feeling comfortable bringing their children on transit, the added inconvenience of strollers on transit, and the extra time that transit can take.

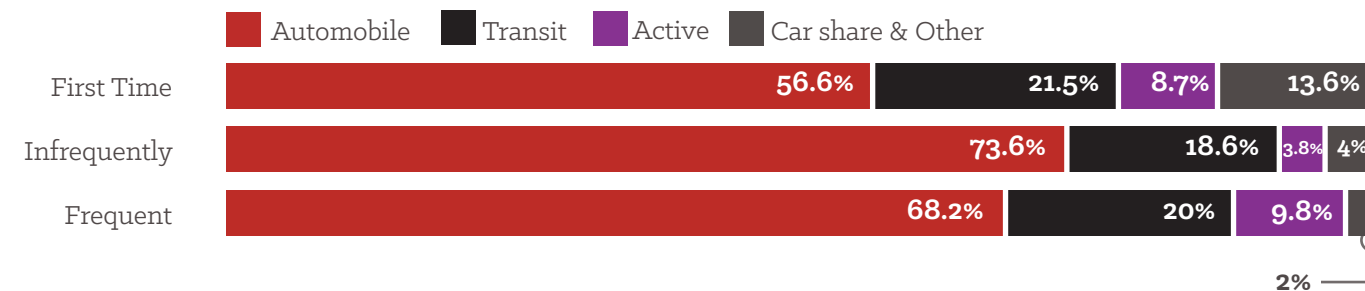
Passengers per Private Vehicle: 3.28 Parkwide Average



Mode-Split Based on Where they are Coming From:



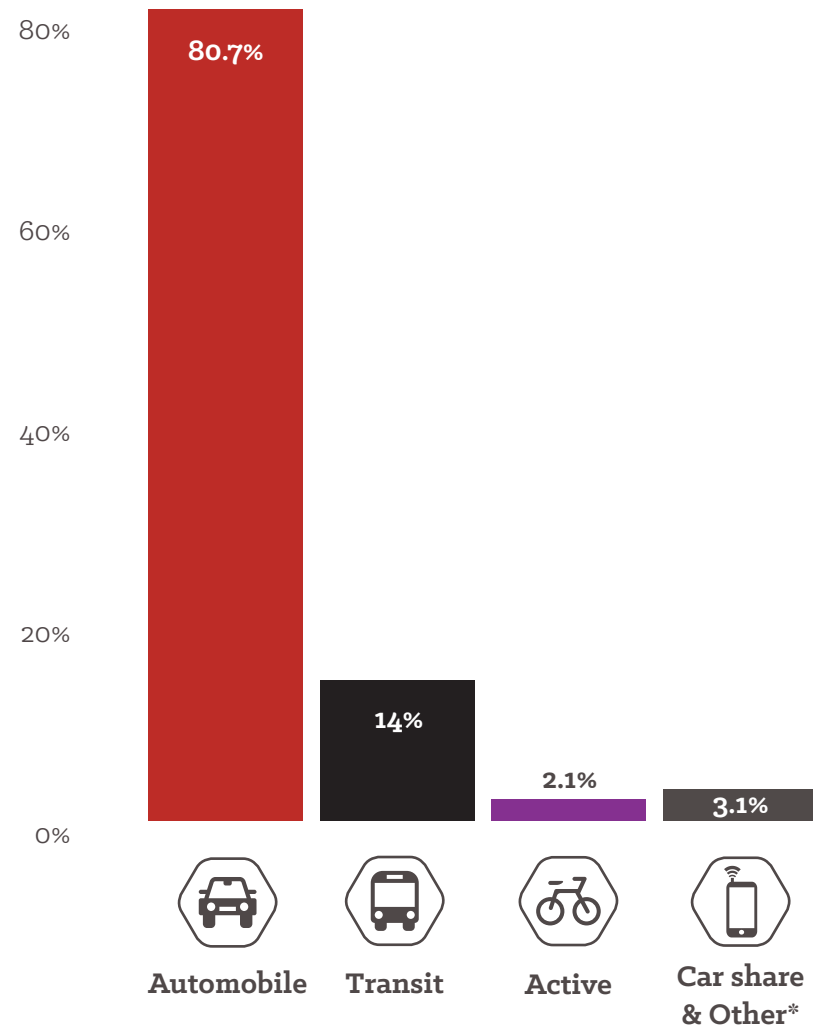
Mode-Split Based on Visitor Frequency:



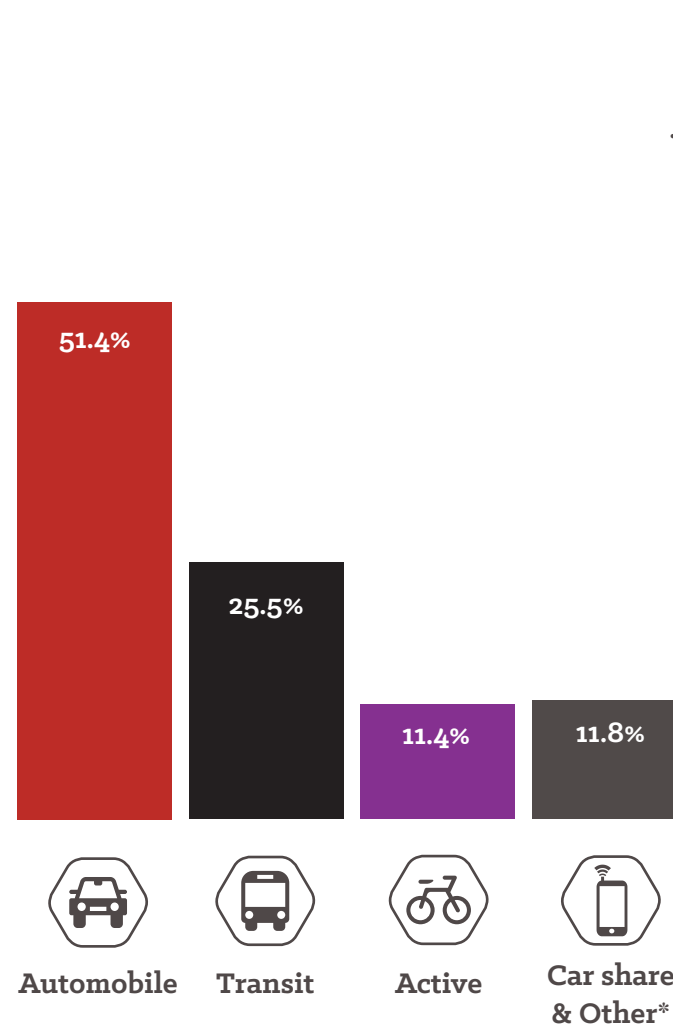
MODES



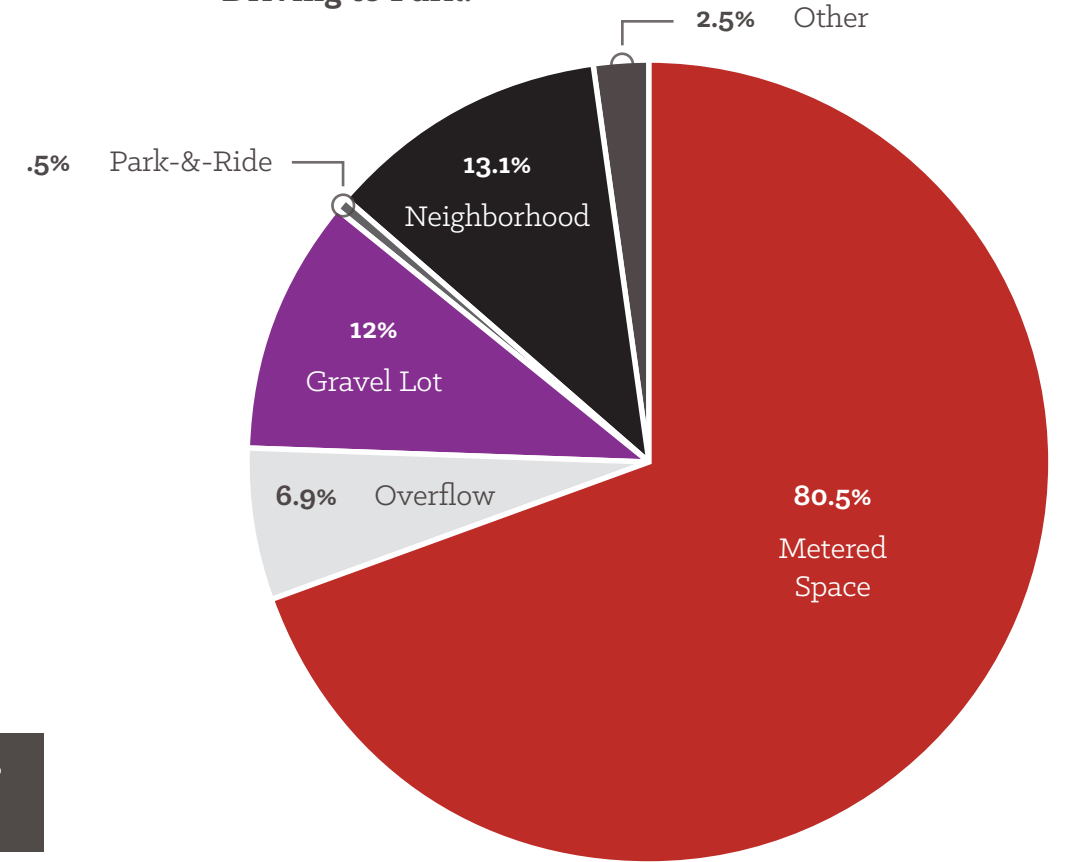
Groups with Children (1-17 years old), Mode-Split:



Adult only, Mode-Split:



Parking Location of People Driving to Park:



40%
of people parking
in overflow are Zoo
guests

93%
of people parking on
neighborhood streets
are visiting the gardens
or Hoyt Arboretum

Non-Member Mode-Split:



Member Mode-Split:





MOVEMENT

*How did they
get around
the Park?*



MOVEMENT

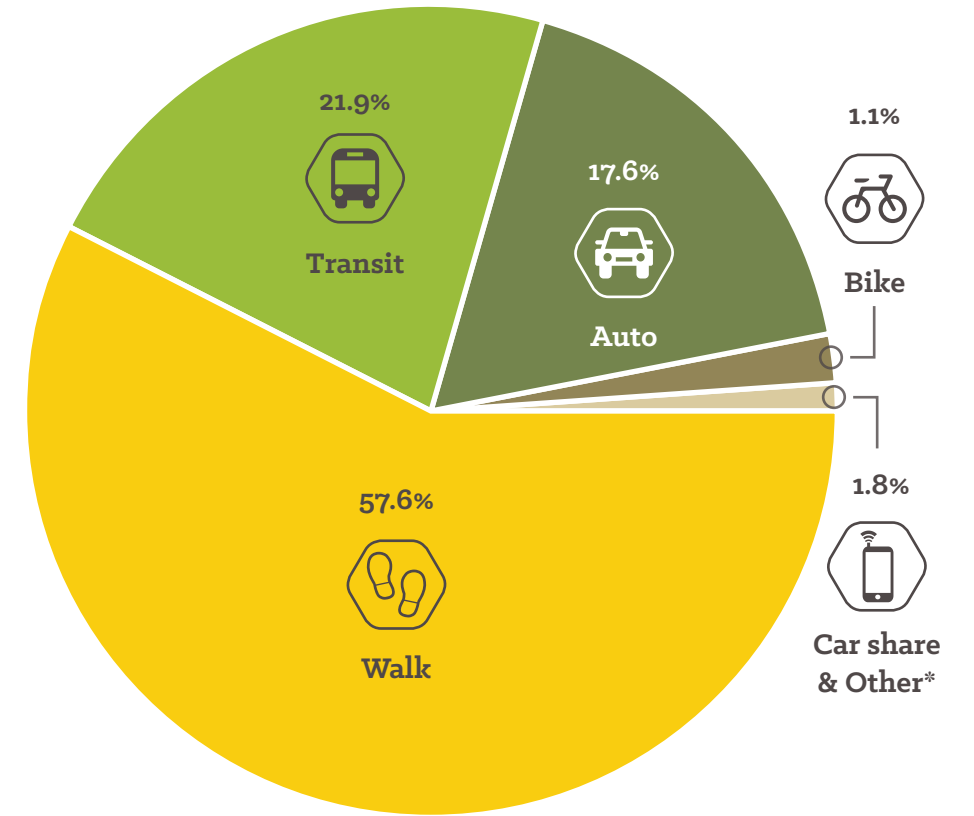
VISITOR MOVEMENT WITHIN THE PARK

Walking is the predominate way for people to get around within Washington Park, followed by the free EWP shuttle and private automobile in third. Institutions that are close to each other have the most cross-over attendance which is mostly accomplished by walking, such as between the Oregon Zoo and the Portland Children’s Museum or the Japanese Garden and the Rose Garden. Travel between the north and south end of the Park, being farther apart and hilly, is mainly accomplished via the free shuttle or private automobile.

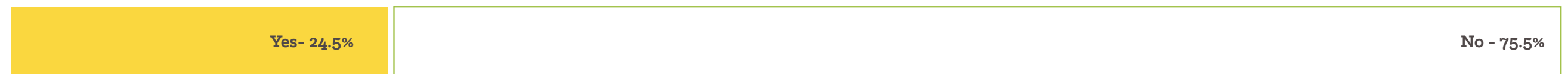
indicated that they had taken or planned on taking the free shuttle to get around the Park. Shuttle ridership is spread out throughout the day between 10 am and 7 pm. Ridership grows slowly throughout the morning, finally peaking around two or three in the afternoon and then quickly falling off as Park venues close around 7 pm and the shuttle service ends. The busiest shuttle stops are the Washington Park MAX station, Rose Garden, and Japanese Garden stops, indicating a strong flow between the north and south ends of the Park.

Approximately one quarter of visitors

Mode-Split Within the Park:



People Using the Shuttle:



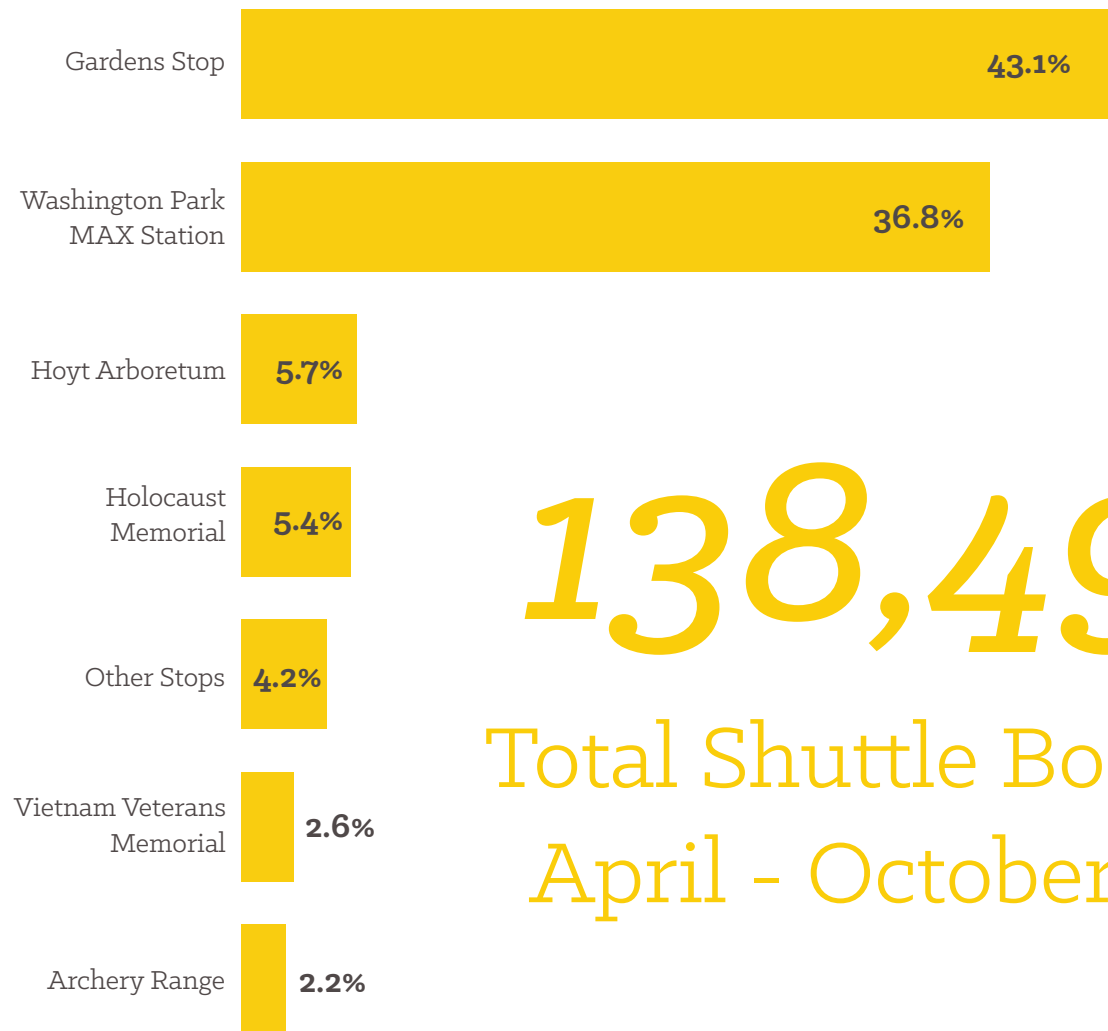
How Shuttle Riders Get to the Park:



Where Shuttle Riders Came From:

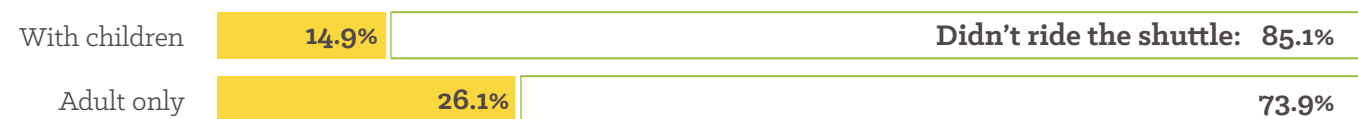


Most Popular Shuttle Stops:

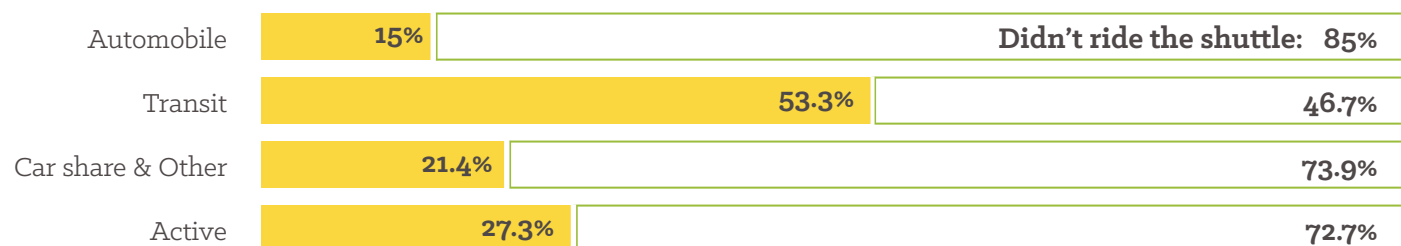


138,494
Total Shuttle Boarding
April - October 2017

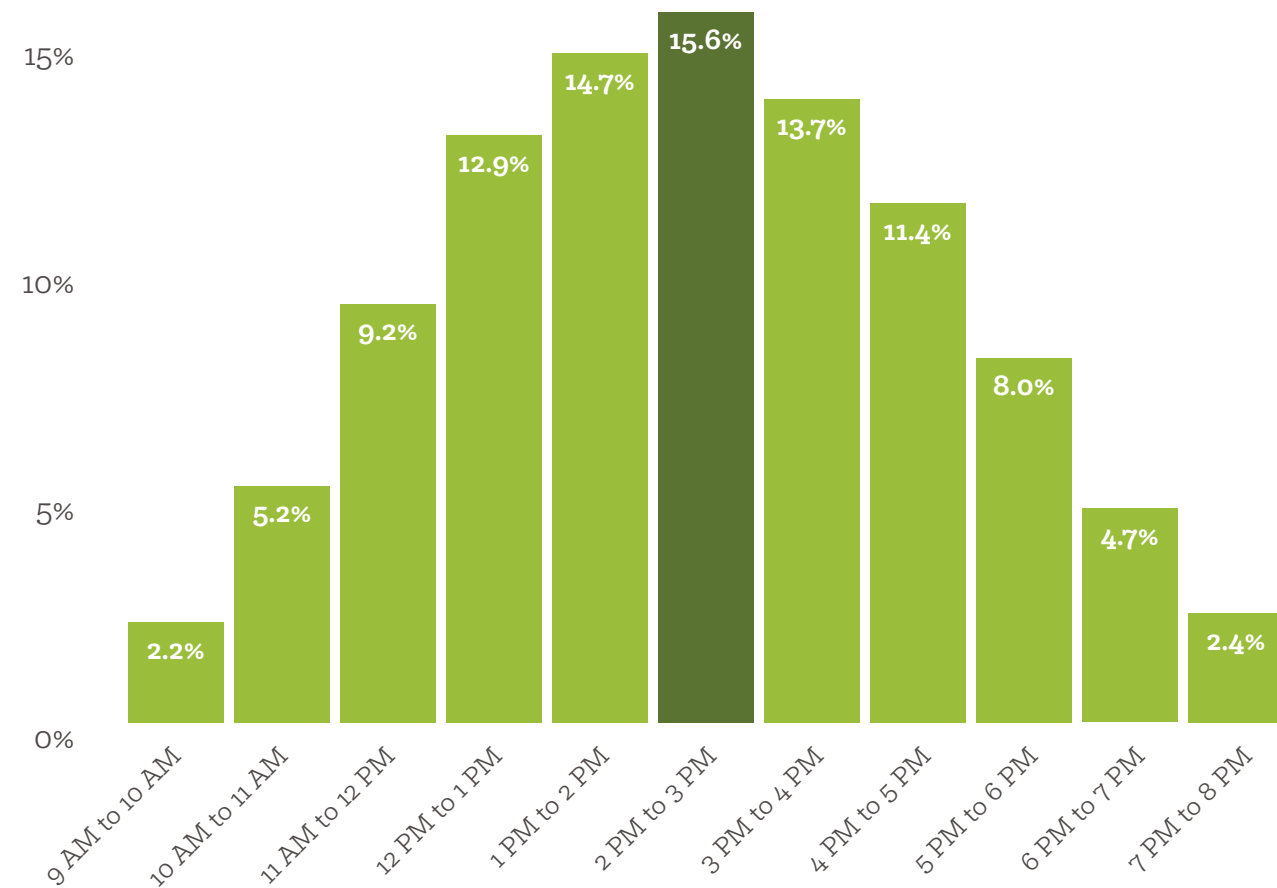
Shuttle Ridership by Family Type:



Proportion of Visitors by Mode-Split Whom Took the Shuttle:



Hourly Intra-Park Shuttle Usage:



VISITOR SHUTTLE USE

Nearly 60% of shuttle riders are tourists coming from the United States or abroad. Since tourists likely have less foreknowledge of the recreational opportunities within Washington Park, they might be more willing to ride the free shuttle to get the opportunity to fully explore the Park. Shuttle riders arrived in the park predominately by transit (45%) and automobile (41%), but transit riders hopped on the shuttle at nearly four times the rate as people driving to the Park, suggesting that the shuttle is acting as a tool to solve the “last mile problem” often prevalent with transit.

Based on group makeup, groups consisting of adults-only were the most likely to take the free shuttle. Seeing as groups with children predominately visit either the Oregon Zoo or Portland Children’s Museum, they have less of a reason and less demand for the service that the free shuttle provides to Park visitors.



MOVEMENT



MOVEMENT

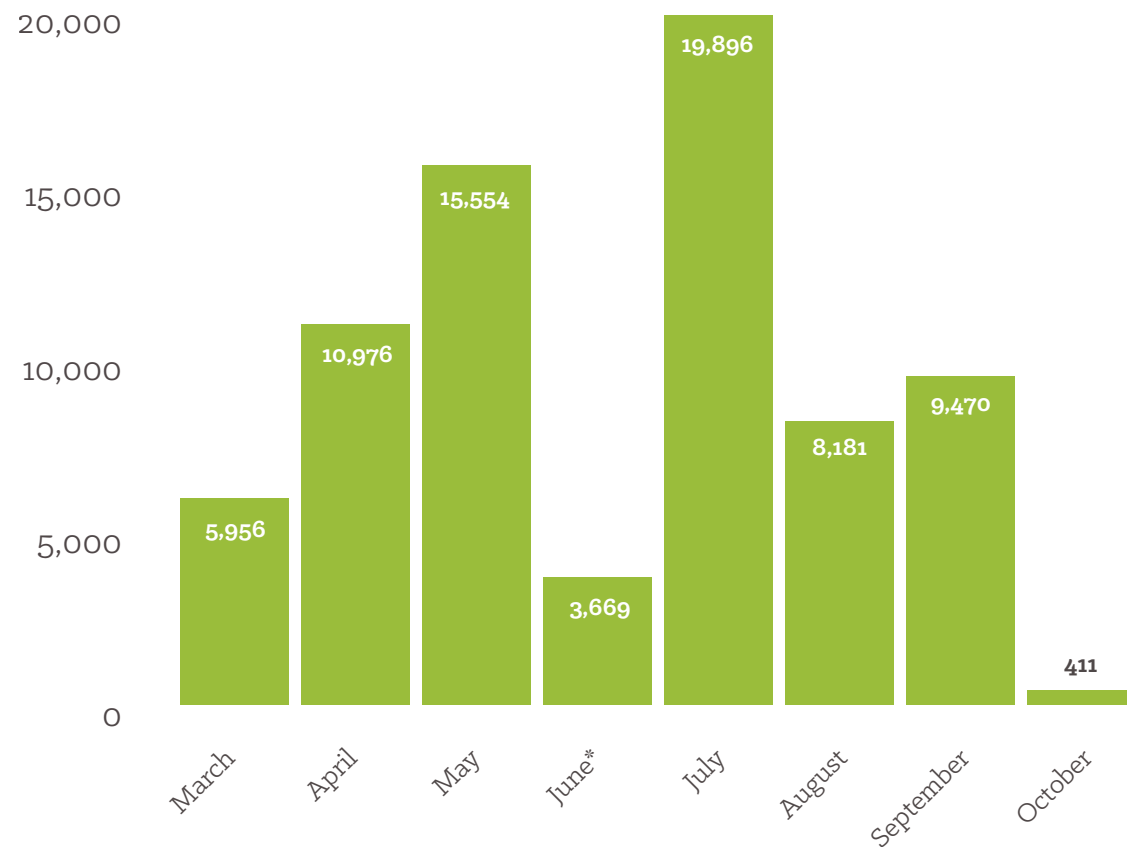
OVERFLOW PARKING & SHUTTLE OPERATIONS

Overflow parking can handle several hundred additional cars when the overflow parking was operated. Two periods represent the majority of demand for overflow parking, the Oregon Zoo's ZooLights event in December, and summer months when school is out, the weather is nice, and tourist season is in full swing. July represented 25% of overflow ridership between March and October of 2017, with overflow shuttles carrying passengers 22 out of 31 (71%) days in July.

June saw a surprising dip in overflow ridership as overflow shuttles were dismissed over 60% of the time they were scheduled throughout June, including two weekends when shuttles were available but went unused because of a lack of demand. Invoices for the overflow shuttle program cost approximately \$125,000 for operations from March through October (not including EWP or PP&R staff time), representing an average cost of \$1.68 per rider through that time period.

Overflow Ridership by Month:

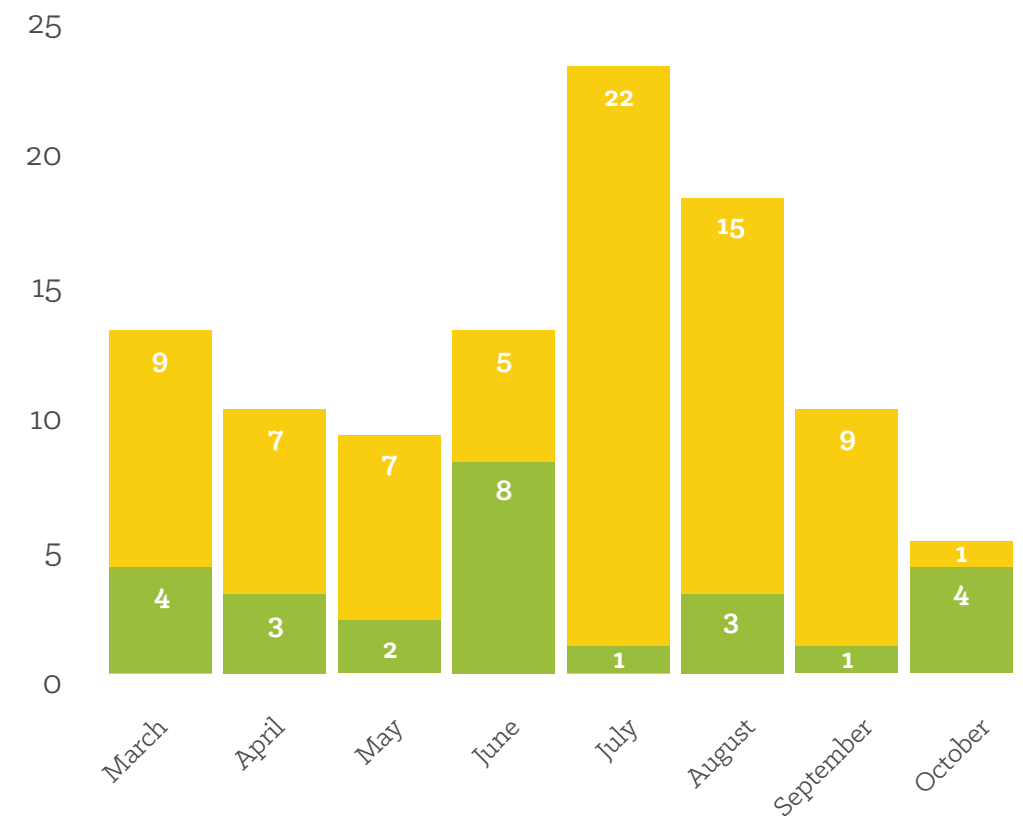
*June overflow ridership was low due to weather related events



74,113
 Overflow Shuttle Boardings
 March - October 2017
 Equal to
22,595 vehicles

Overflow Activation Days:

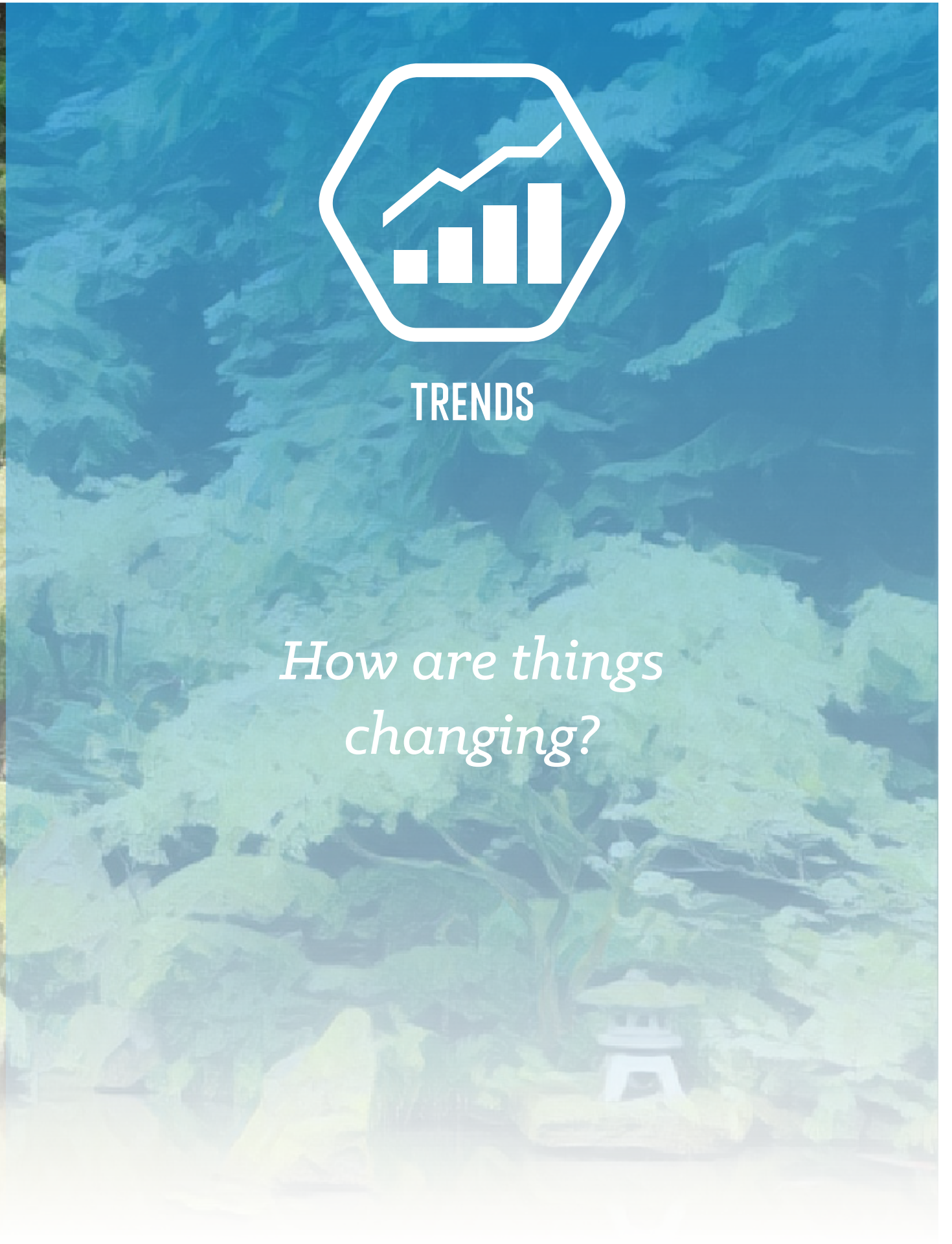
Days Overflow Shuttle Carried Passengers
 Days Overflow Shuttle Dismissed





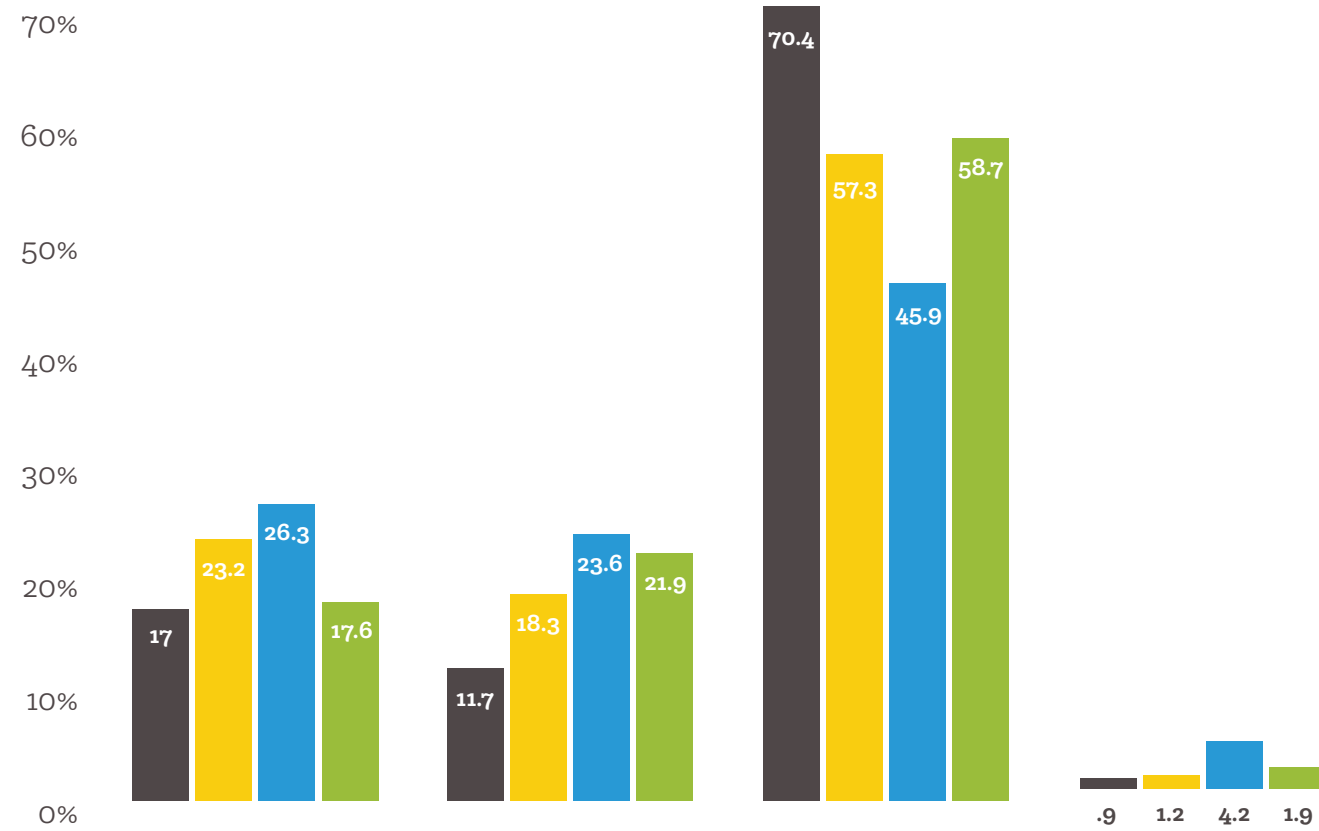
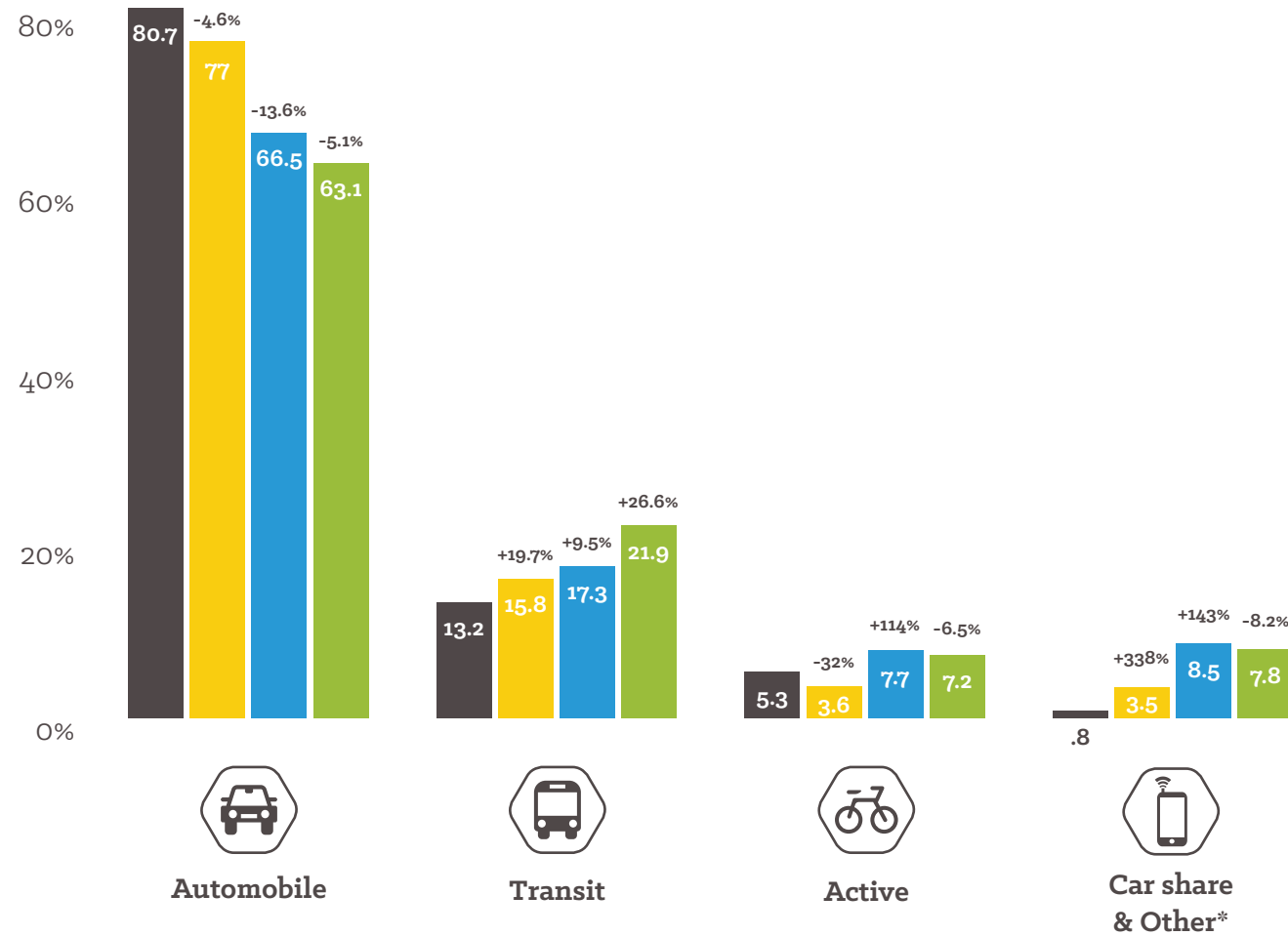
TRENDS

*How are things
changing?*

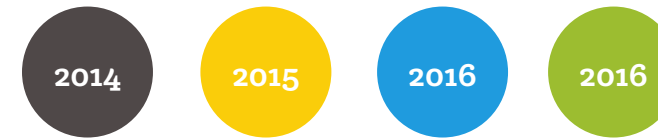




Park Visitor Mode-Split 2014 - 2017:



Intra-Park Mode-Split 2014 - 2017



TRANSPORTATION TRENDS SHAPING THE PARK

With data collected since 2014, four years of data offers a chance to confidently look at trends taking shape inside the Park. Automobile's mode-split continues to decline in 2017, decreasing by 5% year-over-year to a new low of 63%. Transit showed strong growth, continuing the trend of the last two years, increasing by 26% to a new high of 21.9%. Active and car share modes stayed relatively flat compared to 2016. In 2016, car share grew exponentially from previous years, causing some issues inside the Park and making EWP prepare for continued growth that didn't materialize in 2017. However, the worry and preparation this caused allowed EWP to proactively plan for and manage ride-share services.

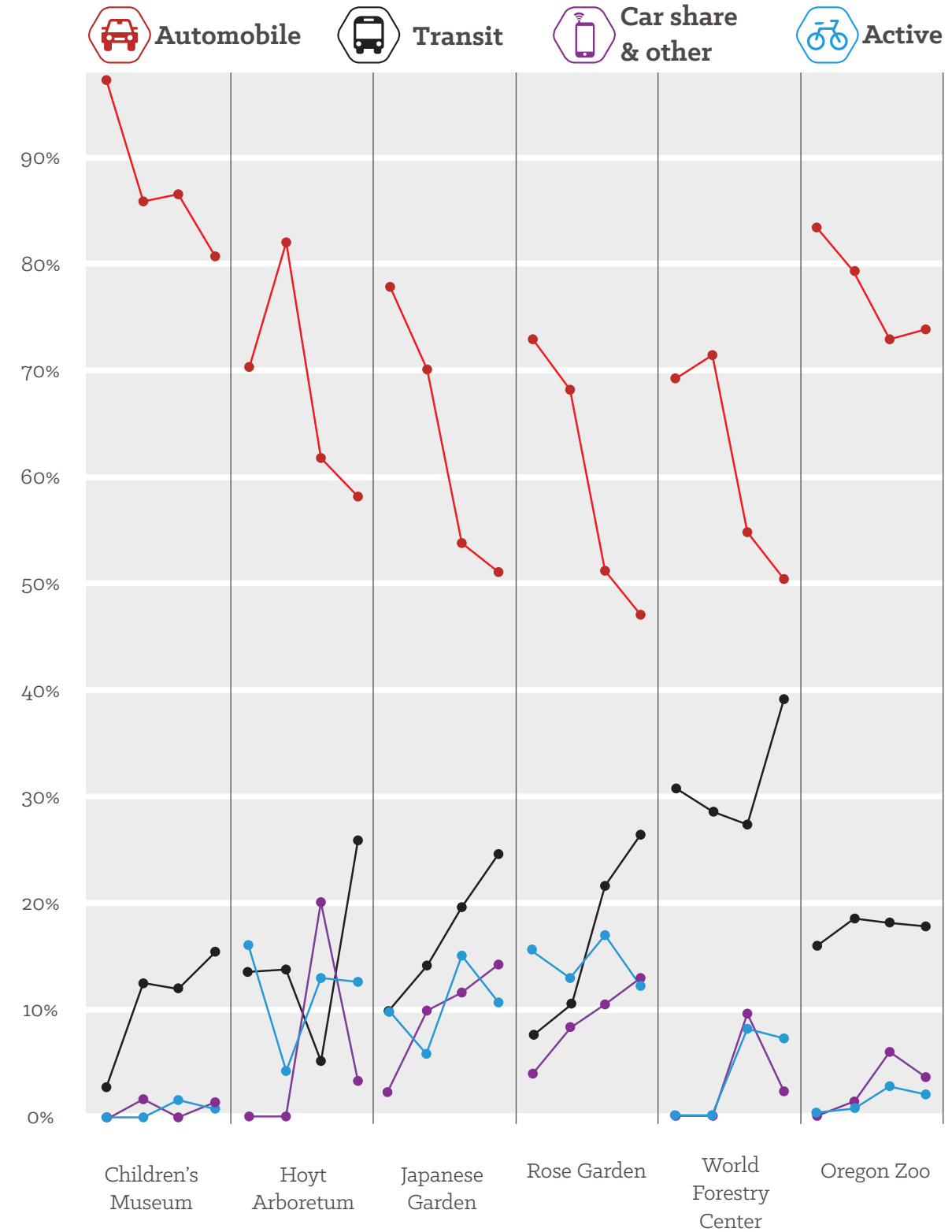
Each institution is generally showing a consistent mode-split trend for the three years from 2015 through 2017. The exception to this is the Oregon Zoo, which saw its transit and automobile mode-splits stay relatively unchanged this year. The rest of the institutions saw their automobile mode-splits continue to fall in the range

of a 4-6% annual decrease in automobile mode-split and an increase in the range of 20-30% for transit.

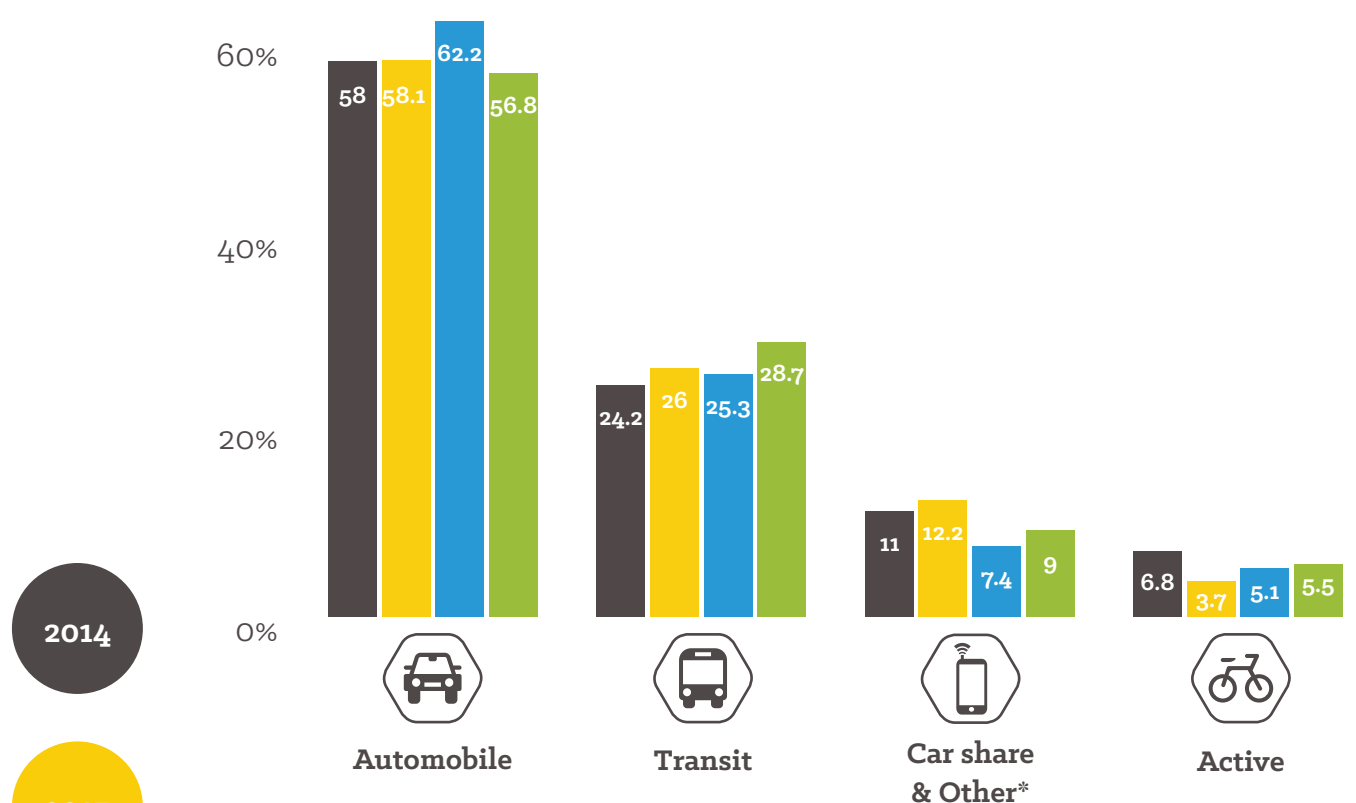
A consistent upward trend in the number of visitors enjoying multiple venues seems to have developed since the first year of the survey in 2014, increasing from 31% to 55%. The free EWP shuttle seems to be playing an important role in stitching together the Park as a whole and making it increasingly easy for people to visit multiple destinations.

Another interesting three-year trend appears to be developing in the frequency of visits as less people appear to be visiting the park on a frequent basis. The proportion of first time visitors increased this year to nearly 50% of Park visitors while frequent visitors continued to slide as a proportion of overall visitors to a low of 13%. This seems to represent the increasing proportion of tourists visiting the Park as Portland continues to grow as a national and international destination.

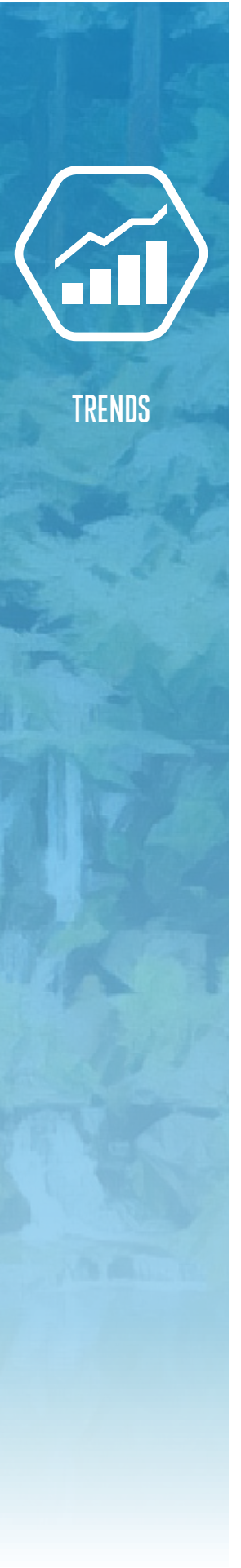
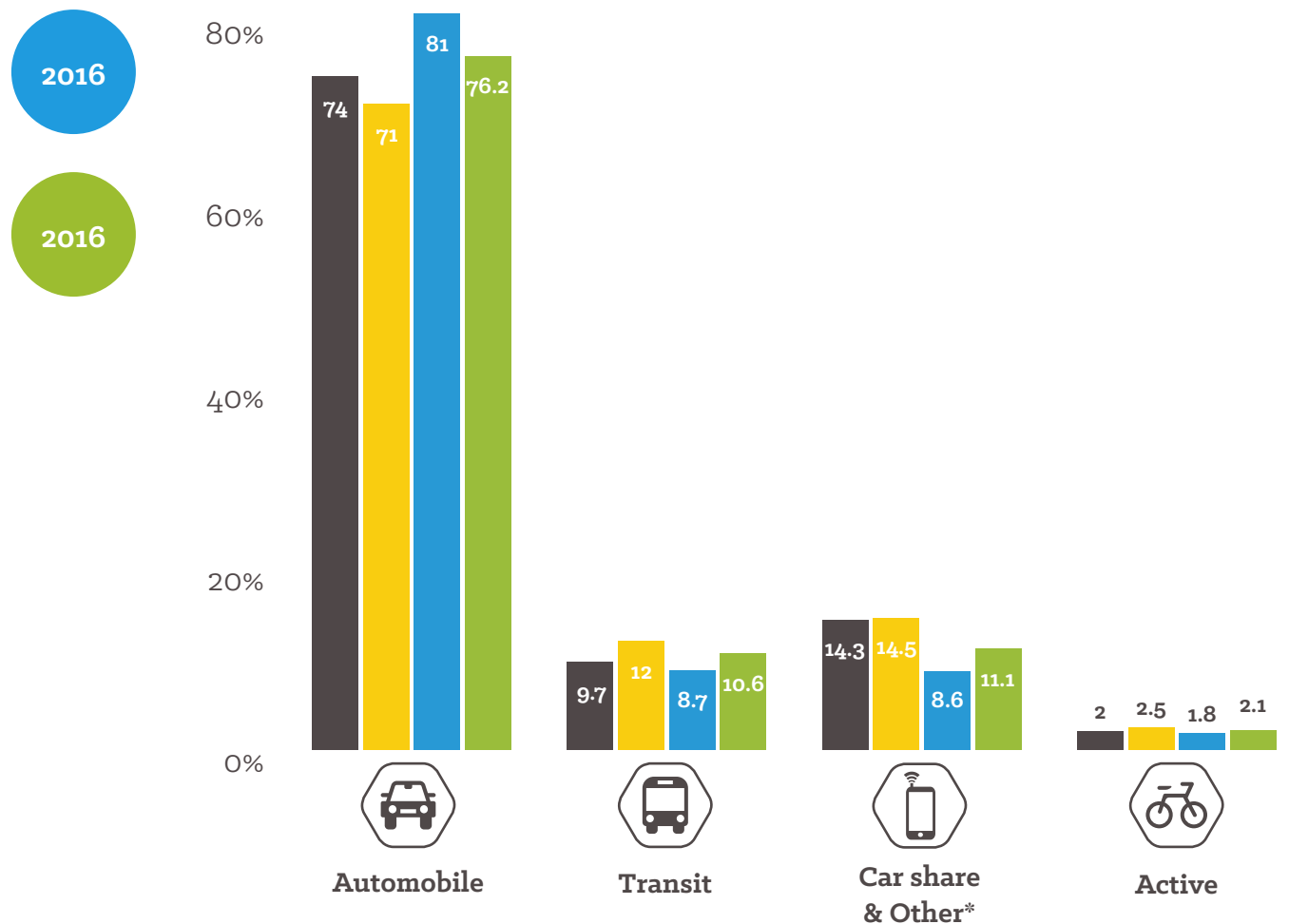
Venue mode split trend 2014 - 2017:



Employee Mode-Split: 2014 - 2017:



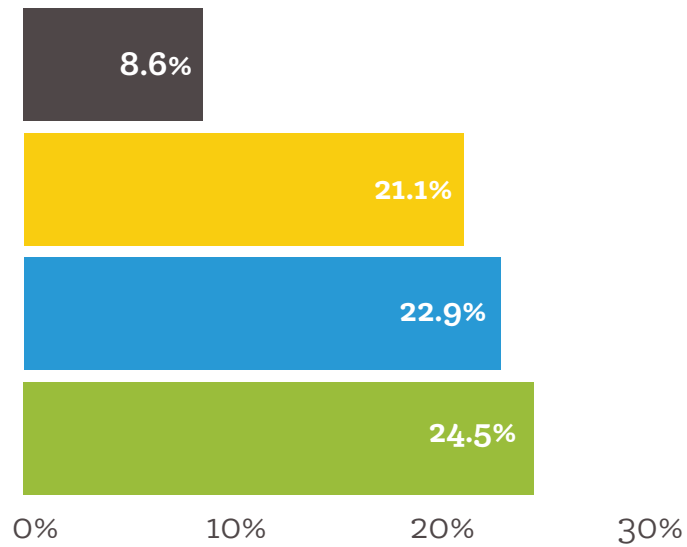
Volunteer Mode-Split: 2014 - 2017:



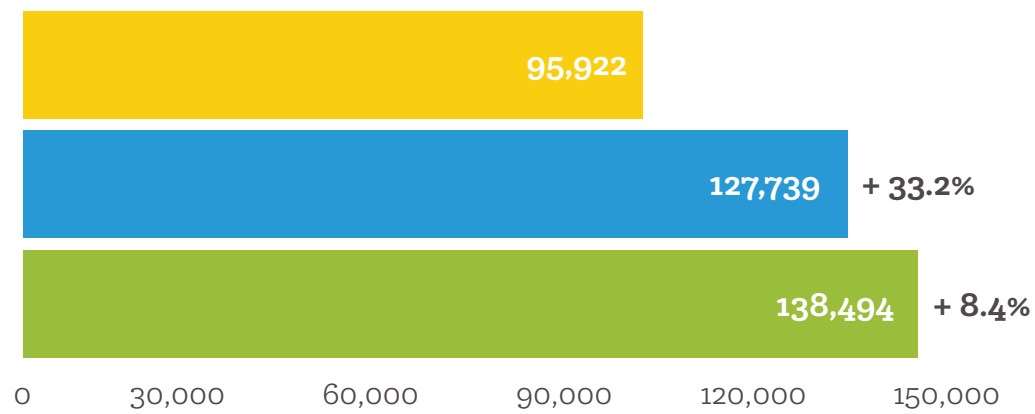


TRENDS

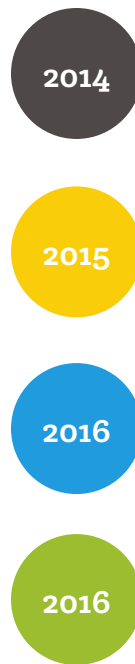
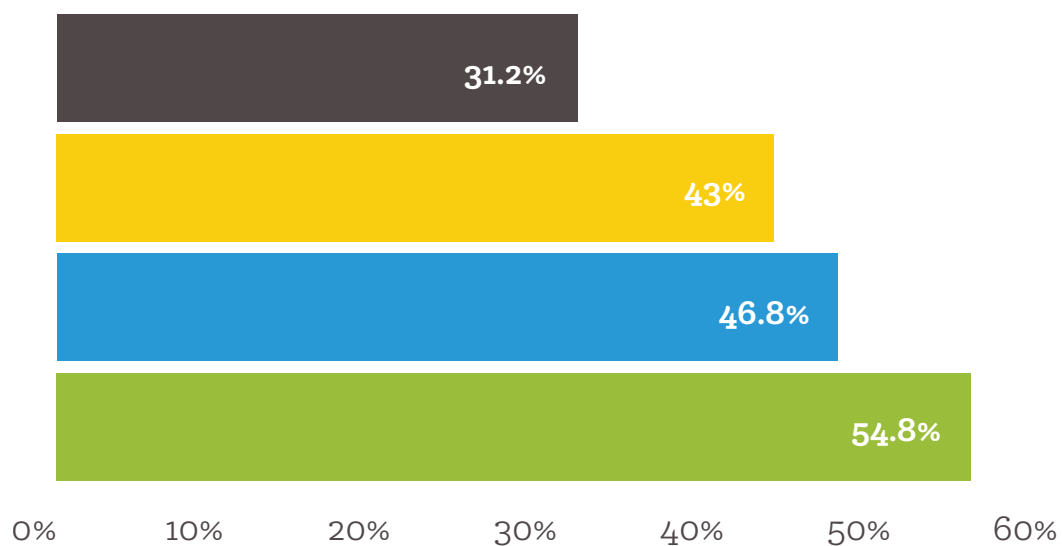
Park Visitors Using the Intra-Park Shuttle 2014 - 2017:



Intra-Park Shuttle Boardings 2015 - 2017:



Park Guests Visiting More than One Institution 2014 - 2017:



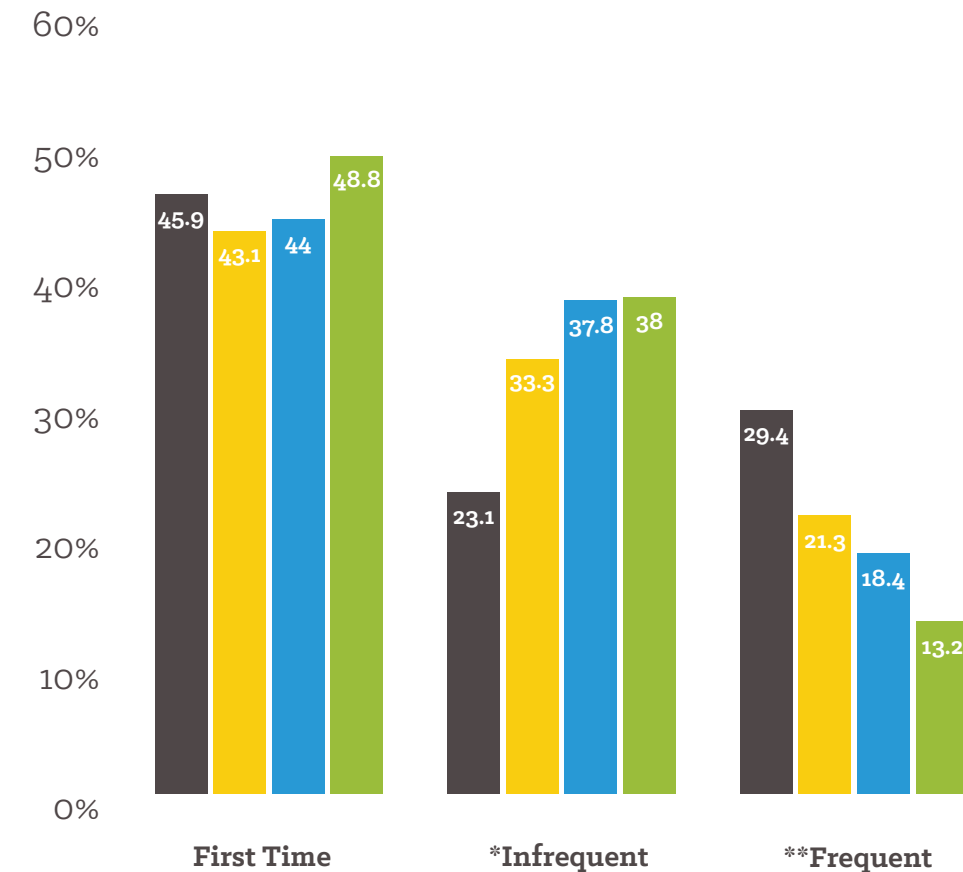
INTRA-PARK TRENDS

Overall mode-split within the Park showed a reversal of the trends from previous years, with the automobile mode-split decreasing, shuttle mode-split staying relatively flat, and walking showing a large increase. Walking as a means of getting around the Park grew from 44% in 2016 to 58% this year, representing an increase of 30%. This is perhaps due to more cross-venue attendance between the Oregon Zoo and the Portland Children's Museum, as well as among the Portland Japanese Garden and the Rose Garden. These two pairs of

venues are extremely close together, making the most convenient option walking. Another factor could be the loss of parking on the North side of the Park for the whole of the season, making parking more precious, more difficult to find, and people less likely to move their car once parked.

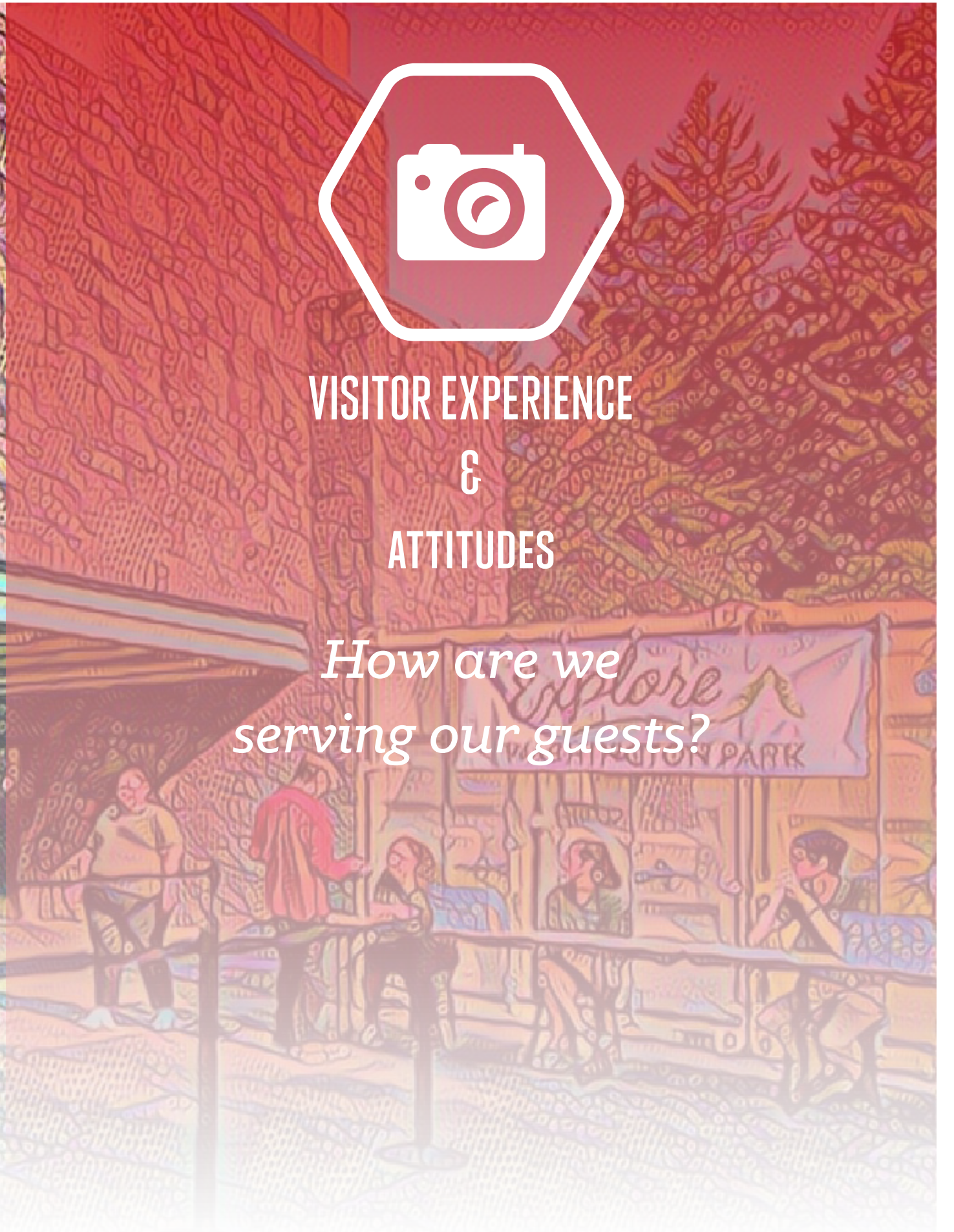
Even with the change in intra-park trend for 2017, the general trend is for more people to be taking the shuttle within the Park.

Frequency of Visits 2014 - 2017:



*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.



VISITOR EXPERIENCE
&
ATTITUDES

*How are we
serving our guests?*

VISITOR EXPERIENCE & ATTITUDES

VISITOR EXPERIENCE

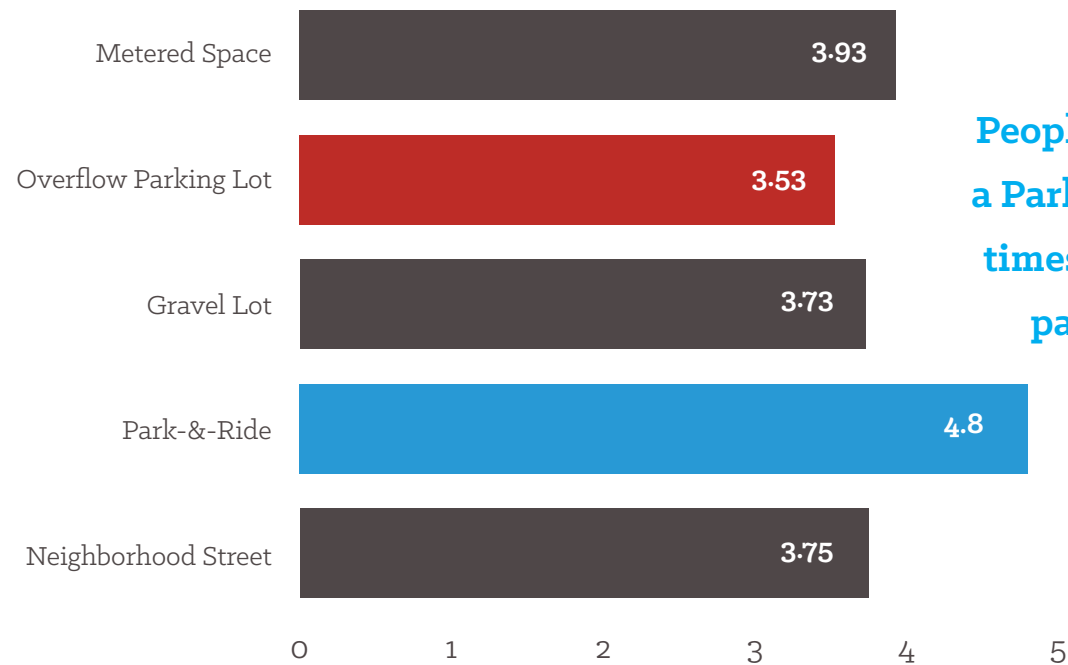
2017 represents the first year EWP has conducted an extensive look into guest experience in an attempt to gauge how well EWP is serving Park guests. The survey contained questions asking people to rate their travel experience to Washington Park and to rate their shuttle experience.

Overall, the travel experience was rated an average of 3.9 out of 5. Those choosing to drive to the Park had the lowest guest experience while transit users had the highest, 3.87 vs. 4.5. Conversely, those parking at the overflow parking rated their experience the lowest of all, at 3.53 while the highest ratings came from those parking

at TriMet Park-n-Ride locations, with a rating of 4.8, a 36% higher average rating compared with overflow.

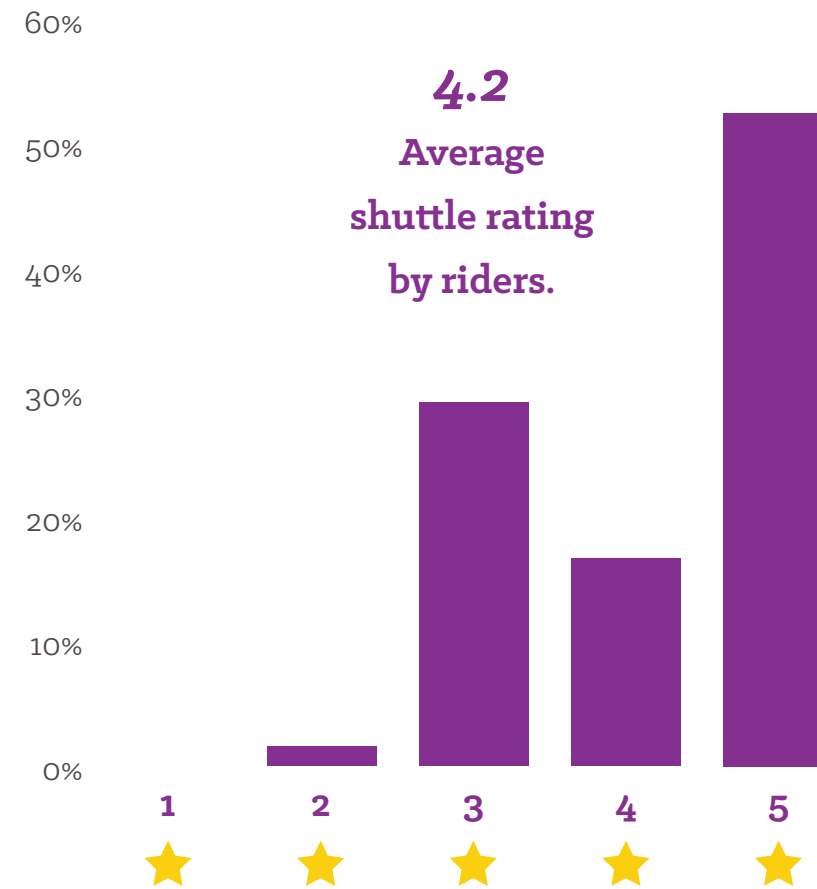
When cross-tabulating with respondent's pre-trip information answers, we see that the most well informed guests have the most pleasant travel experiences. People getting trip information from the EWP website or brochure, TriMet, and tourist information rated their travel experience on average a 4.42 vs. a 4.02 for those that used only Google Maps or didn't do any pre-trip planning. This suggests that setting people's expectations for parking and transit options leads to a more satisfied visitor.

Automobile Travel Experience Based on Parking Location:

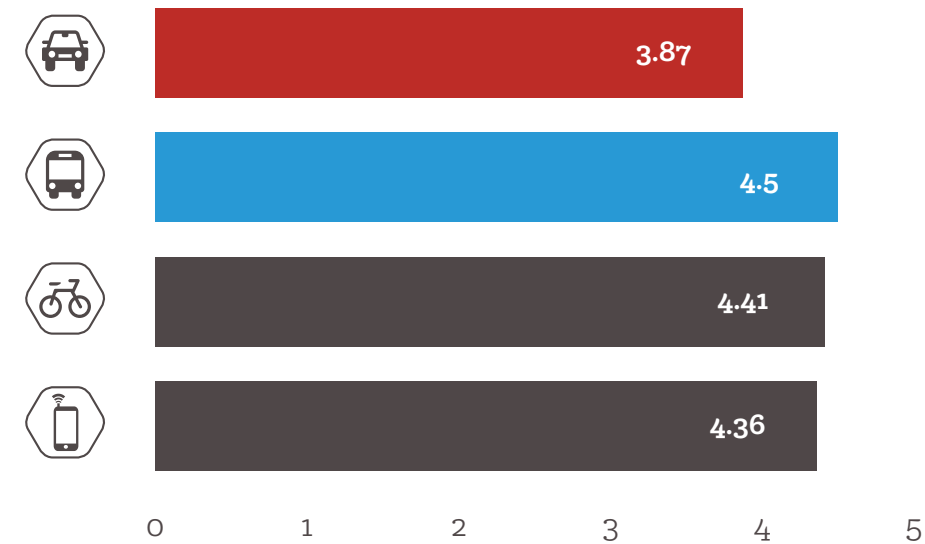


People gave parking at a Park & Ride 5 ★ at 5 times the rate of those parking at overflow

Intra-Park Shuttle Rider Rating:



Travel Experience by Mode to Washington Park:



Transit riders are 17% more satisfied than those driving

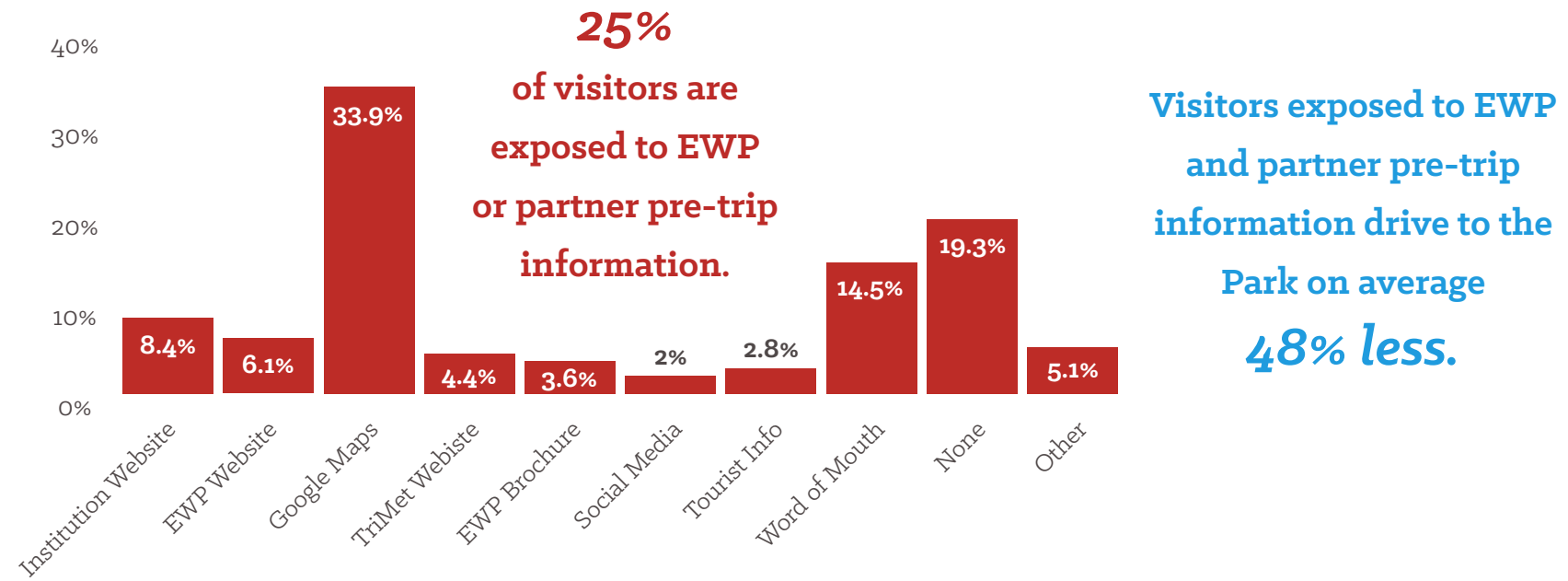
PRE-TRIP INFORMATION & VISITOR ATTITUDES

Pre-trip transportation information is one tool to potentially change people's transportation choices. EWP uses several tools including the EWP website and brochure for this reason, as well as partnering with local concierge and tourist information providers like Travel Portland. These tools reach approximately 25% of Park visitors, suggesting that there is a big opportunity to reach more visitors before they arrive at the Park.

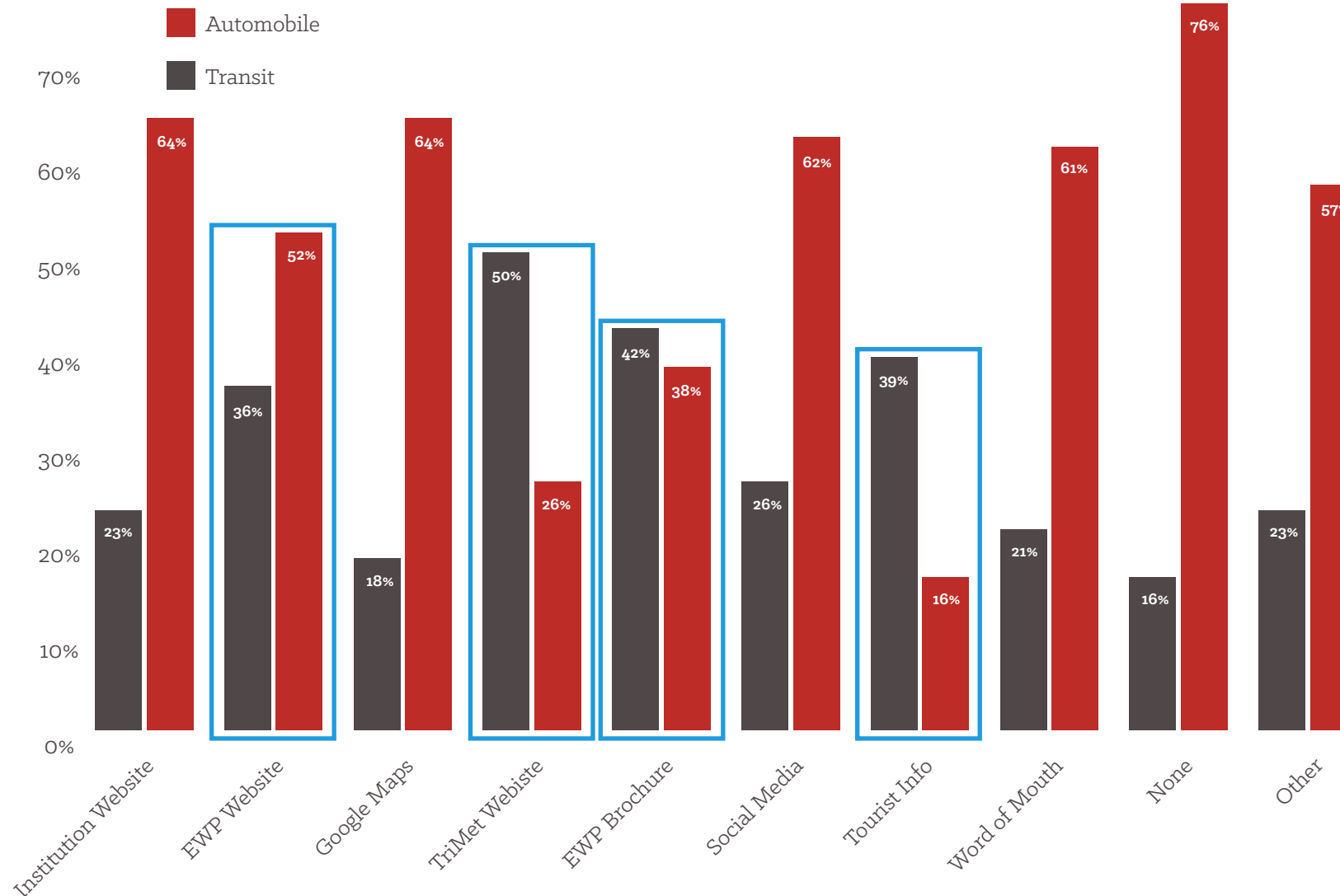
Pre-trip information does seem to have an impact, people accessing the EWP website, brochure, TriMet, or tourist information all have mode-splits that are more balanced toward transit and in-fact, visitors exposed to these sources of information, on average, drive 48% less than visitors getting pre-trip information from other sources.

The majority of visitors (78%) are already aware of transit access to the Park, but only 36% of visitors said they would be somewhat or very likely to take transit on their next visit to the Park compared to 51% that said they would be somewhat or very unlikely to take transit.

Pre-Trip Information Source:



Mode-Split to Park and Expose to Pre-Trip Information:



VISITOR EXPERIENCE
&
ATTITUDES



78%

of visitors are aware that transit is an option to Washington Park.

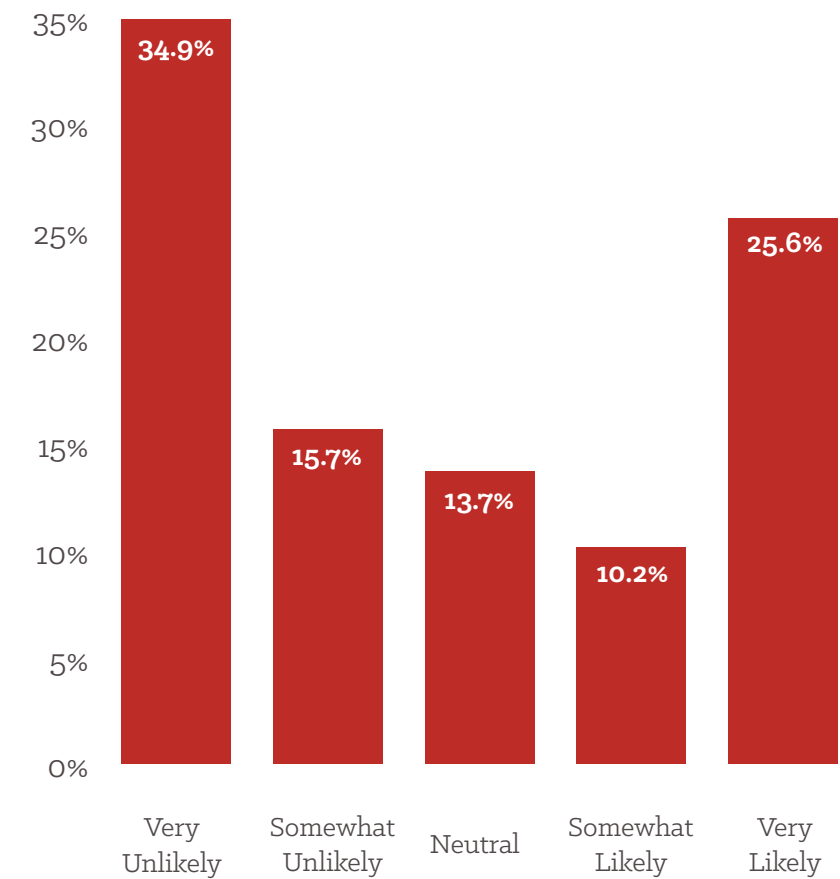
TOP 3 BENEFITS

- ① **29%** Helps to avoid the parking hassle.
- ② **24%** Helps to avoid traffic congestion.
- ③ **19%** Saves the family money.

TOP 3 BARRIERS

- ① **16%** Travel time takes too long.
- ② **11%** Access to transit is not convenient.
- ③ **10%** I'm traveling with children.

Likelihood Visitors Driving Will Take Transit on Their Next Visit:





WASHINGTON PARK

2017 Visitor survey report