

Explore

WASHINGTON PARK

WASHINGTON PARK

2016 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:

Eric Vines, Chair, World Forestry Center

Peggie Schwarz, Vice Chair, Hoyt Arboretum

Dave Malcolm, Treasurer, Sylvan Highlands Neighborhood Association

Inessa Vitko, Secretary, TriMet

Mike Abbaté, Portland Parks & Recreation

Allison Duncan, Arlington Heights Neighborhood Association

Don Moore, Oregon Zoo

Cynthia Haruyama, Portland Japanese Garden

Ruth Shelly, Portland Children's Museum

Steve Cole, At-Large Board Member

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



Explore



WASHINGTON PARK

Explore Washington Park (EWP) helps people make decisions about how they get to and around the Park, and ensure 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, 990 visitor surveys were collected in multiple languages including English, Spanish, German, Japanese, and Russian. The data from these surveys, along with 267 employee and 427 volunteer 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 attractions 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.







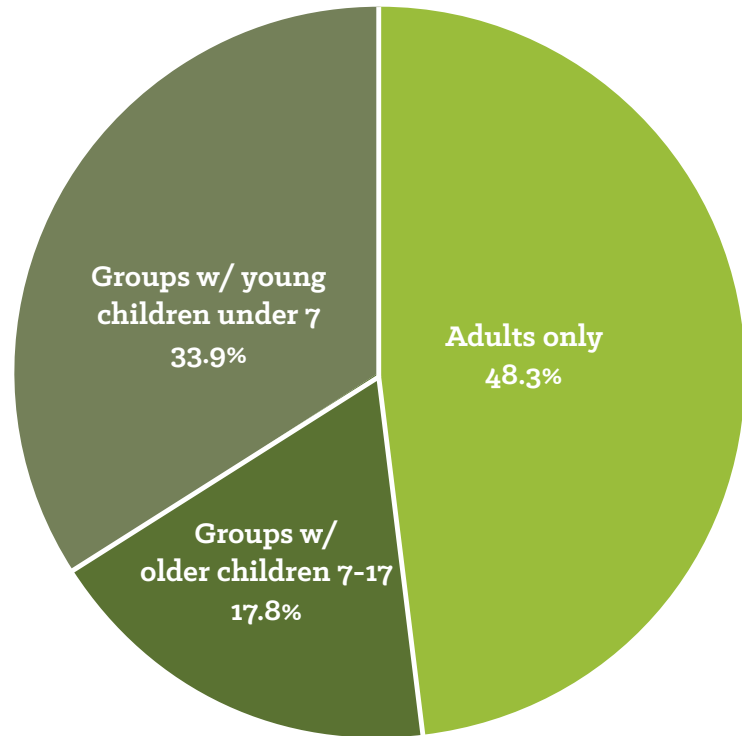
VISITOR PROFILES

*Who's coming to
the park*

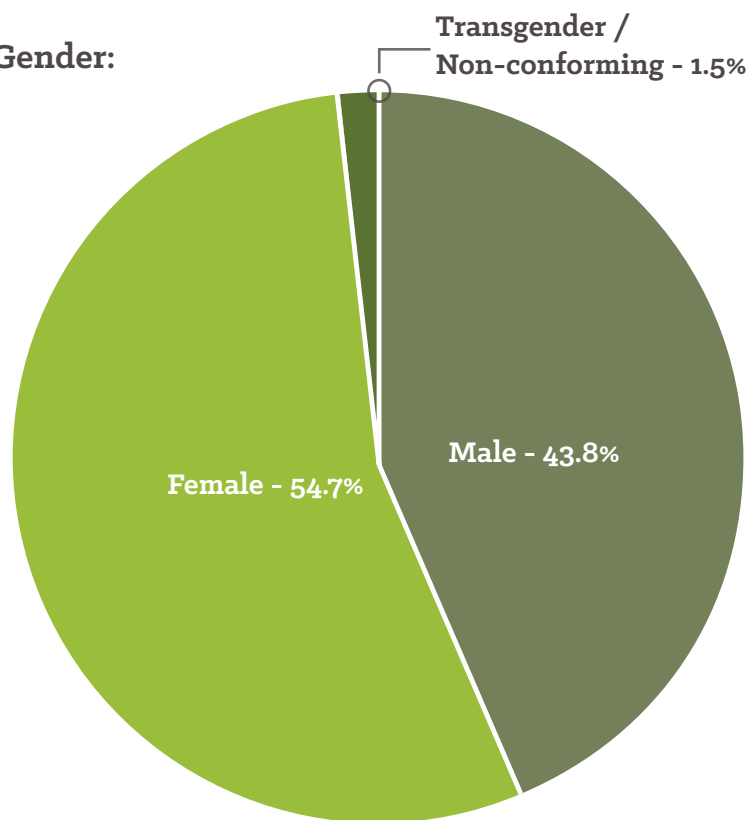


VISITOR PROFILES

Group Makeup:



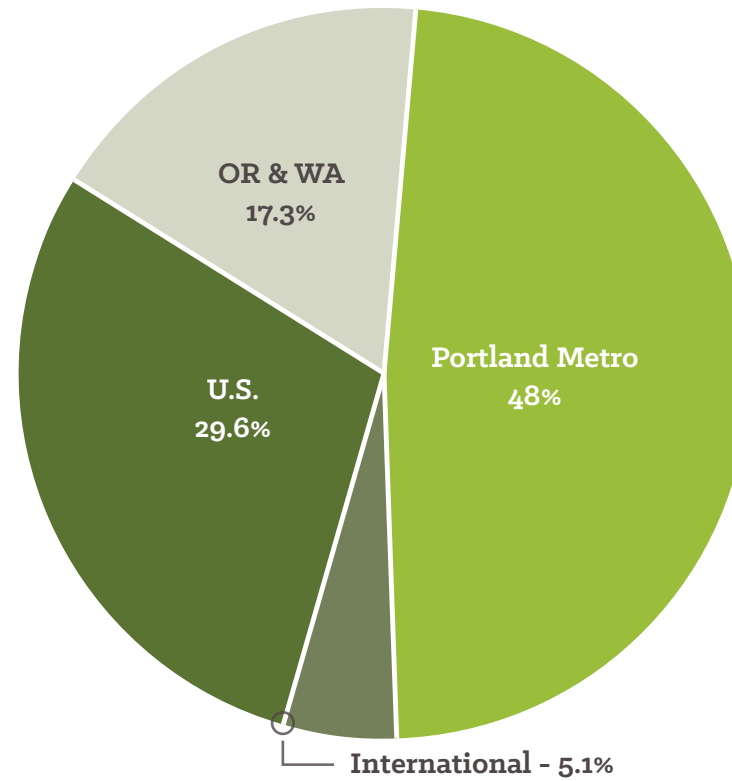
Gender:



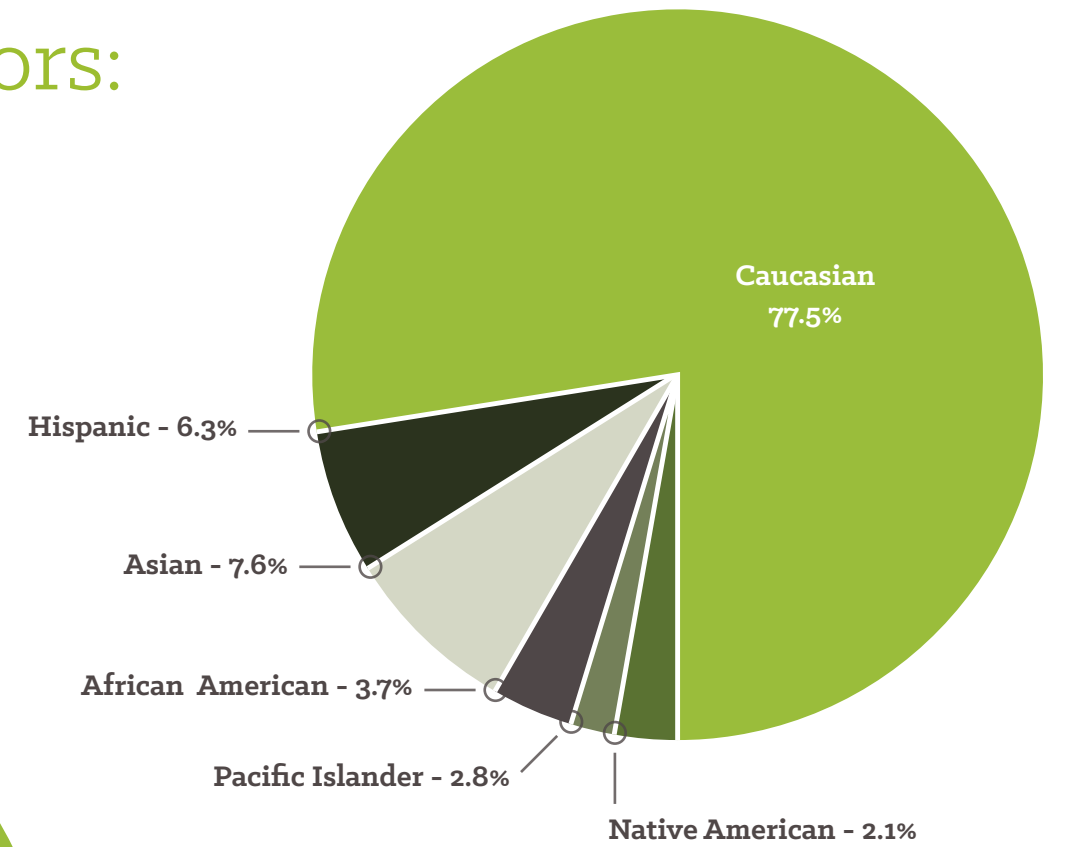
Peak Season Visitors:

1.2 M

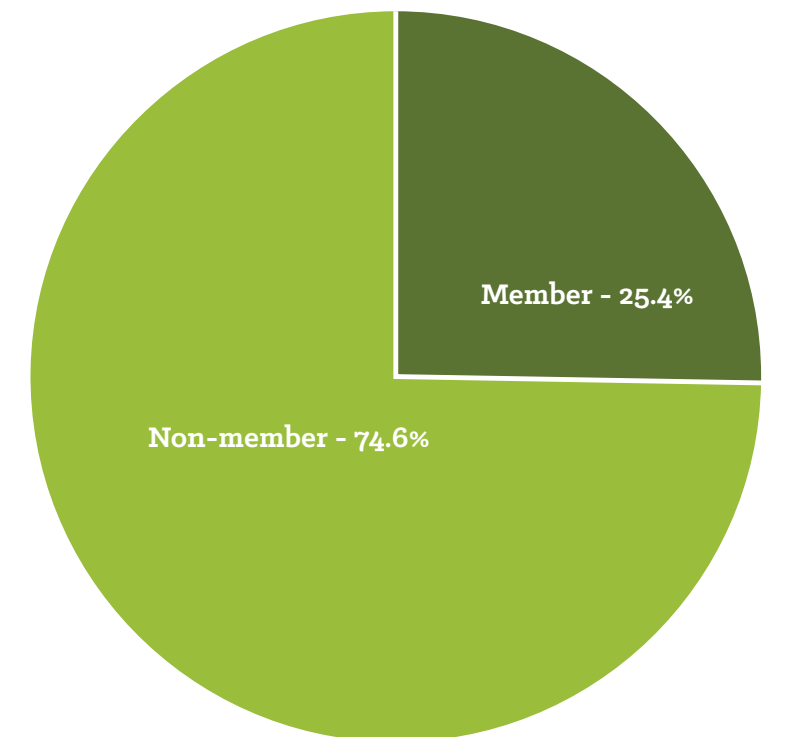
Regional Origin:



Race & Ethnicity:



Membership:



VISITOR GROUP PROFILES

With 3.2 million visitors annually, Washington Park is a major attraction for both people that call the Portland Metro their home, and for tourists visiting Portland from around the world. The large number of visitors means that the demographics of the people coming to enjoy the Park are varied and represent a large swath of different backgrounds and cultures.

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



12%

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

MOST VISITED VENUES & PROPORTION OF VENUE VISITORS



74%



16.2%

Children's Museum

Oregon Zoo



57% are members of the Children's Museum



32% visit the Park a few times per month or more

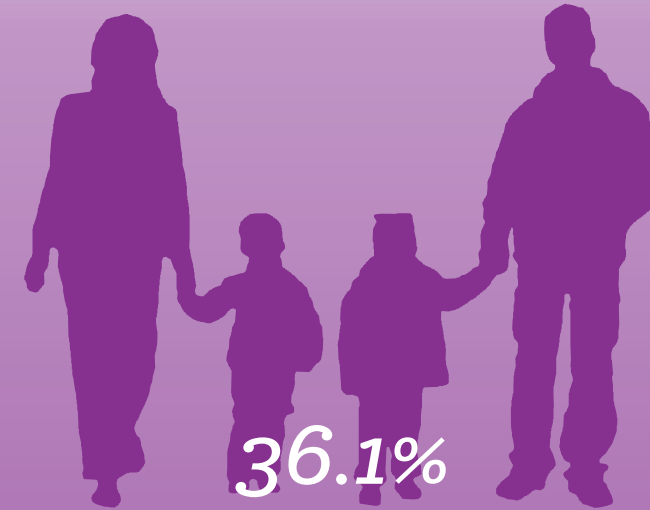


take transit 28% less than the average Park visitor



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

LARGE FAMILY / FRIENDS GROUP



36.1%

Groups of four or more people come mainly from outside the City of Portland but still within the Metro area.

MOST VISITED VENUES & PROPORTION OF VENUE VISITORS



64%



27.2%

Oregon Zoo

Rose Garden



78% are visiting with children



71% visit just one attraction



take transit 24% less than the average Park visitor



drive to the Park 11% 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 & PROPORTION OF VENUE VISITORS



27.6%



23.1%

Japanese Garden

Hoyt Arboretum



33% are members of a venue



26% are over the age of 55

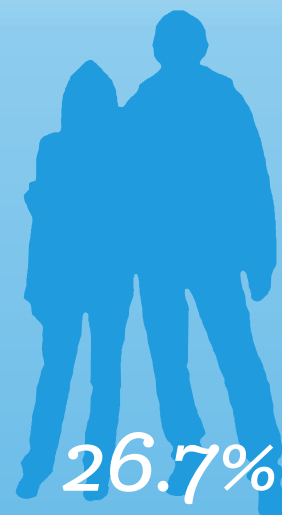


more than twice as likely than the average Park visitor to bike or walk to the Park



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

COUPLES / FRIENDS



Groups of two come mainly from outside the Portland Metro Area

MOST VISITED VENUES & PROPORTION OF VENUE VISITORS



55.8%



59.7%

Rose Garden

Japanese Garden



40% use the free Shuttle, almost double the rate of the average Park visitor



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



visitors without children take transit 25% more than the average Park visitor



drive to the Park 13% less than the average Park visitor

US / INTERNATIONAL TOURISTS



Tourists from outside the Portland Metro area are twice as likely to be first time visitors.

MOST VISITED VENUES & PROPORTION OF VENUE VISITORS



60.2%



61.9%

Rose Garden

Japanese Garden



55% 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 18% less than the average Park visitor



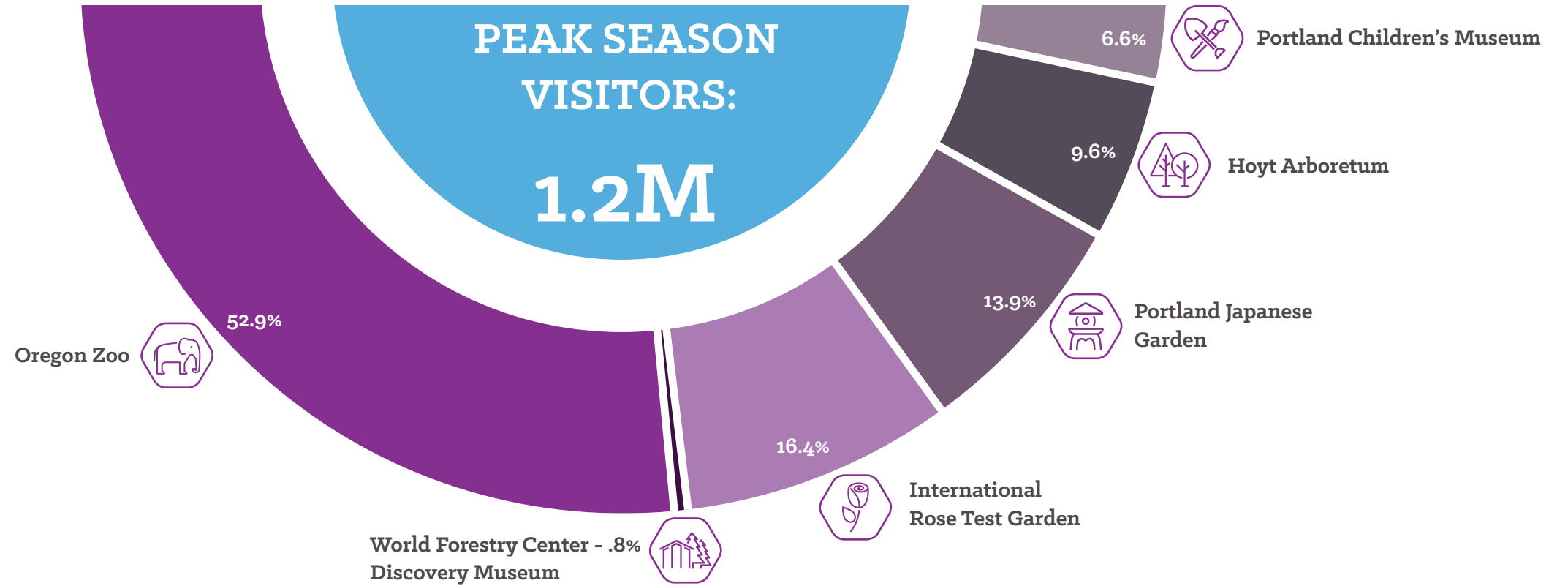
DESTINATIONS

*Where are visitors
going?*

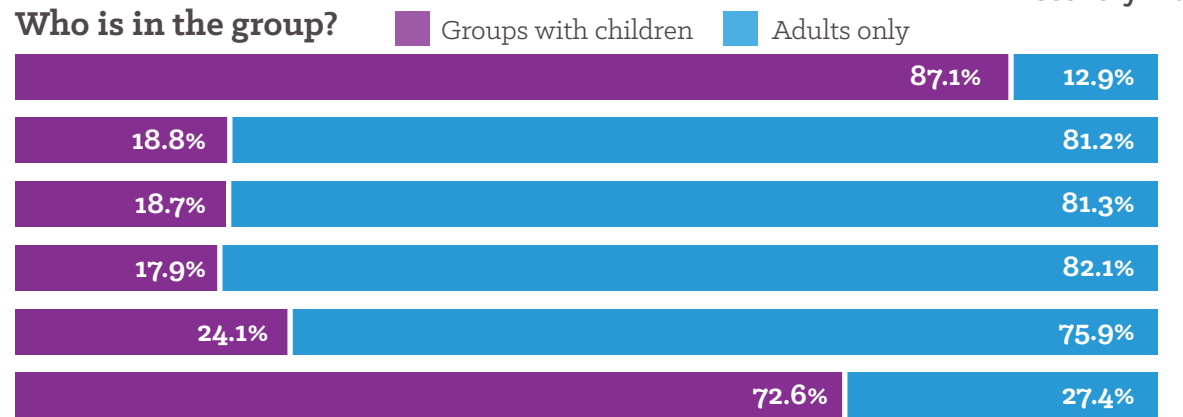


DESTINATIONS

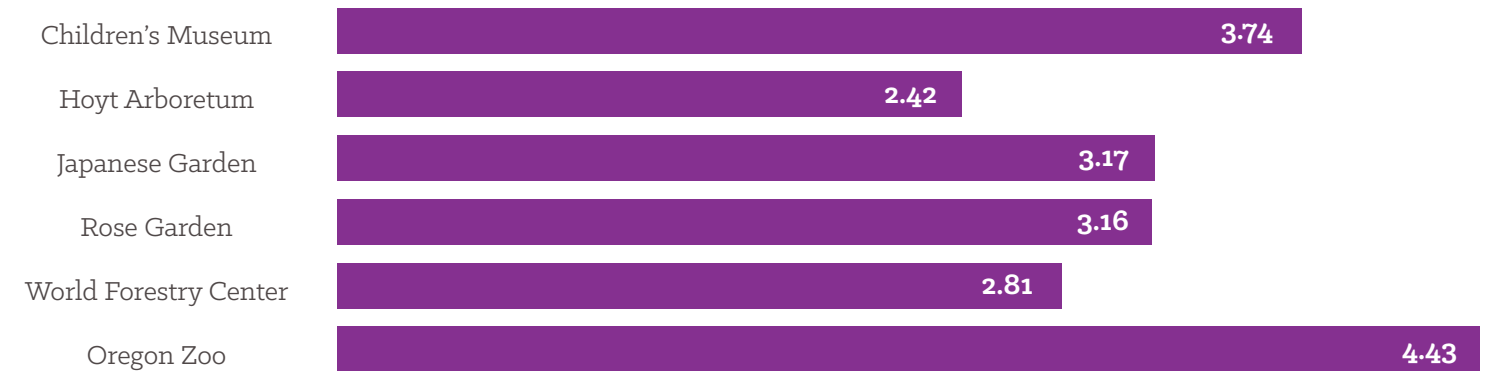
Attendance by Venue:



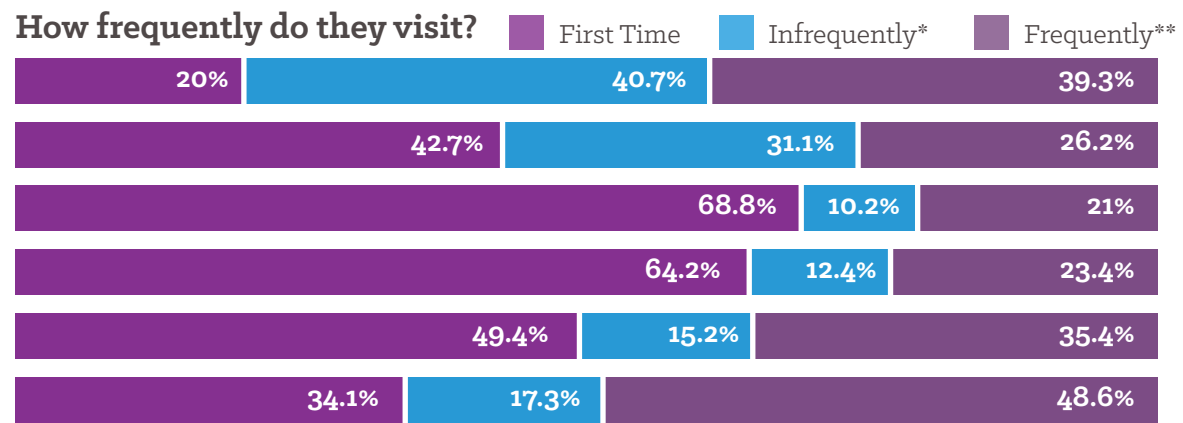
Who is in the group?



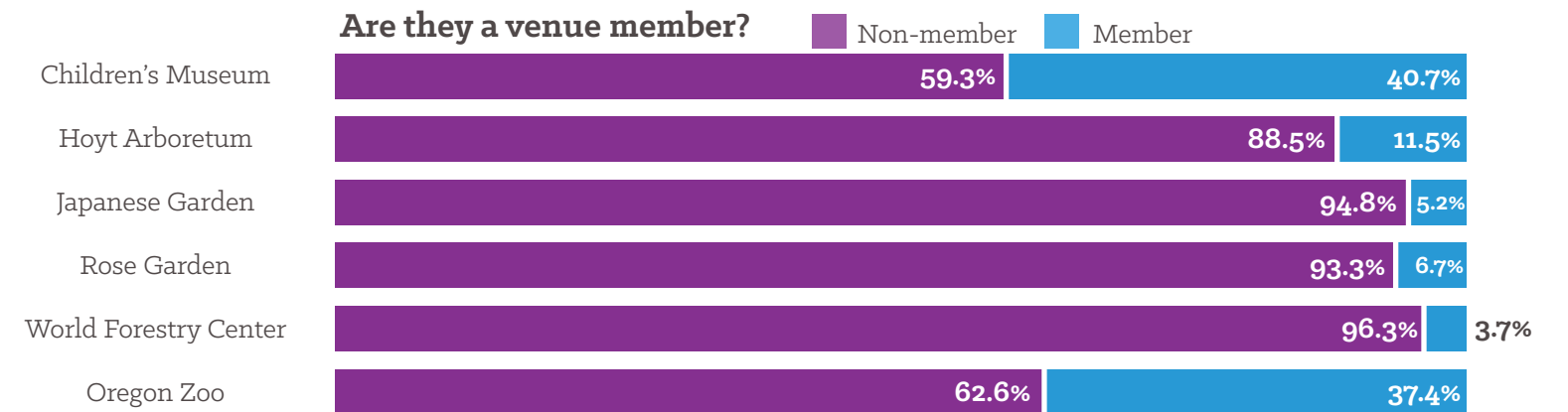
Average group size:



How frequently do they visit?



Are they a venue member?



*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.

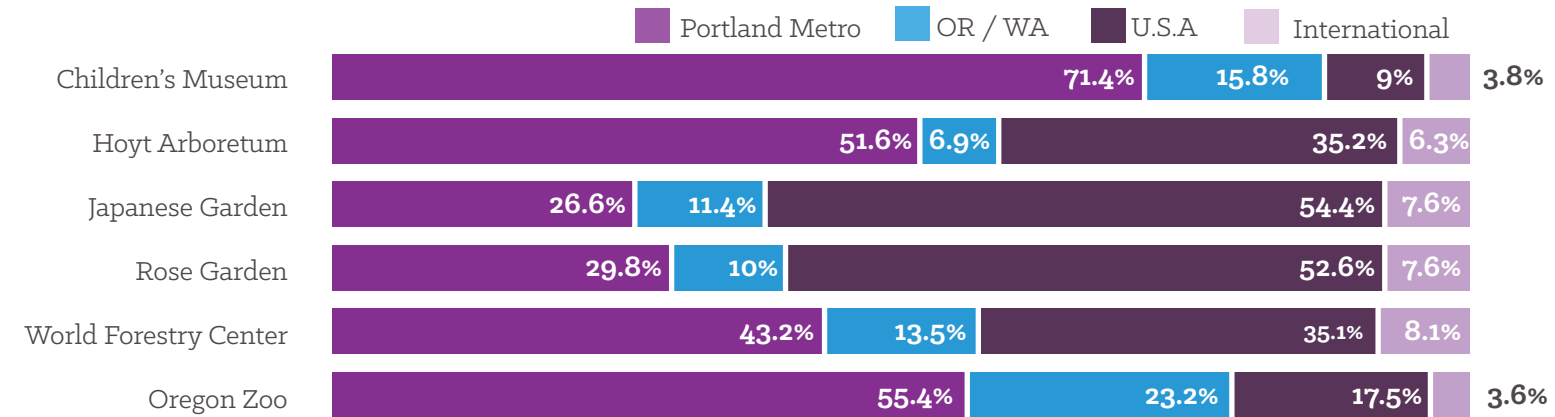
VISITOR DESTINATIONS

Each venue draws a unique demographic of visitors into Washington Park and some of these details are brought to the surface here.

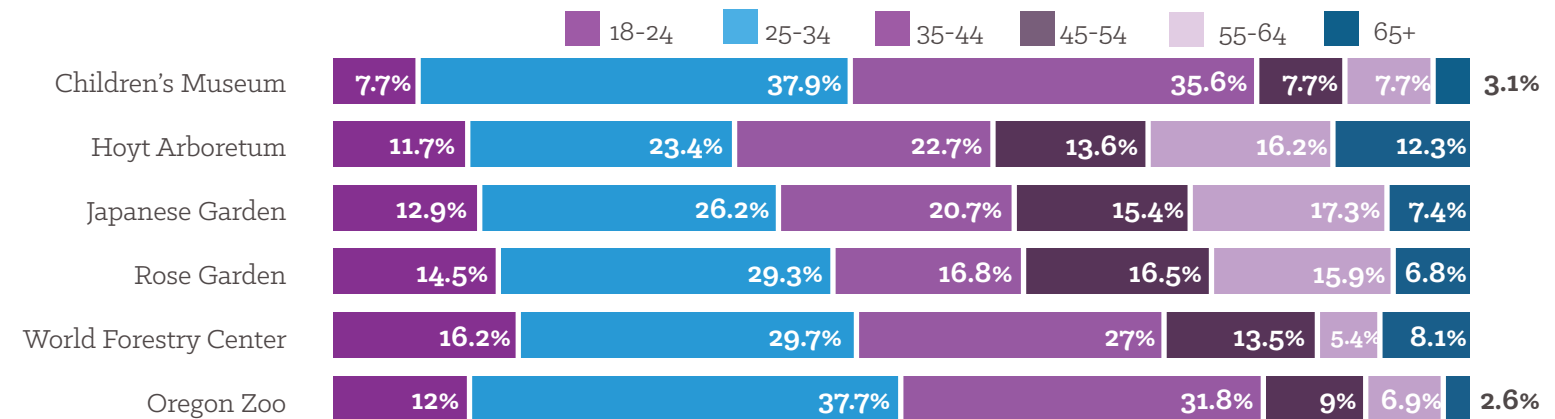
The largest draw for visitors within Washington Park is by far the Oregon Zoo, drawing approximately 1.6 million visitors annually. The Oregon Zoo and Portland Children's Museum have very similar visitor profiles; consisting of mainly larger groups with children coming from the Portland Metro area and visiting a single venue. These two venues also feature the largest portion of visitors that are annual members and that visit the Washington Park on a frequent basis compared with the Park as a whole.

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 more likely to be visiting from outside the Portland Metro area.

Where are they coming from?



Survey respondent age:

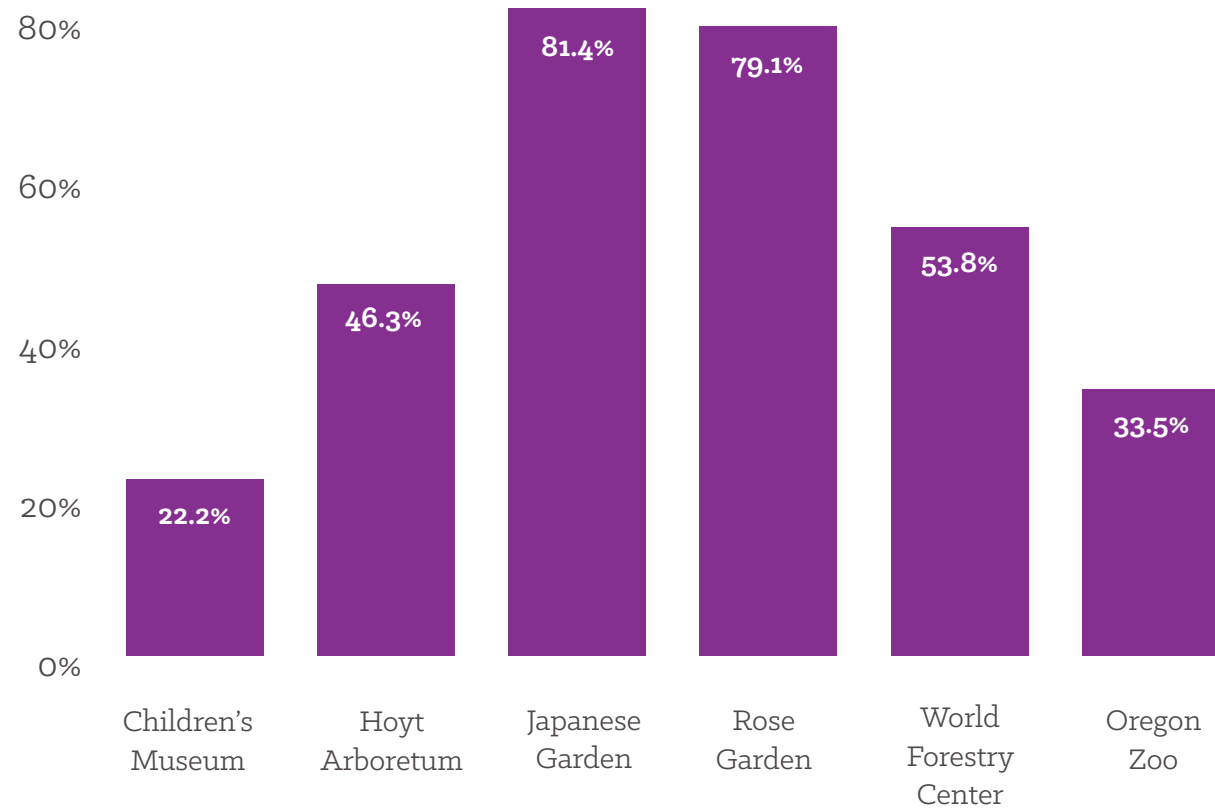


DESTINATIONS



DESTINATIONS

Visitors attending multiple venues:

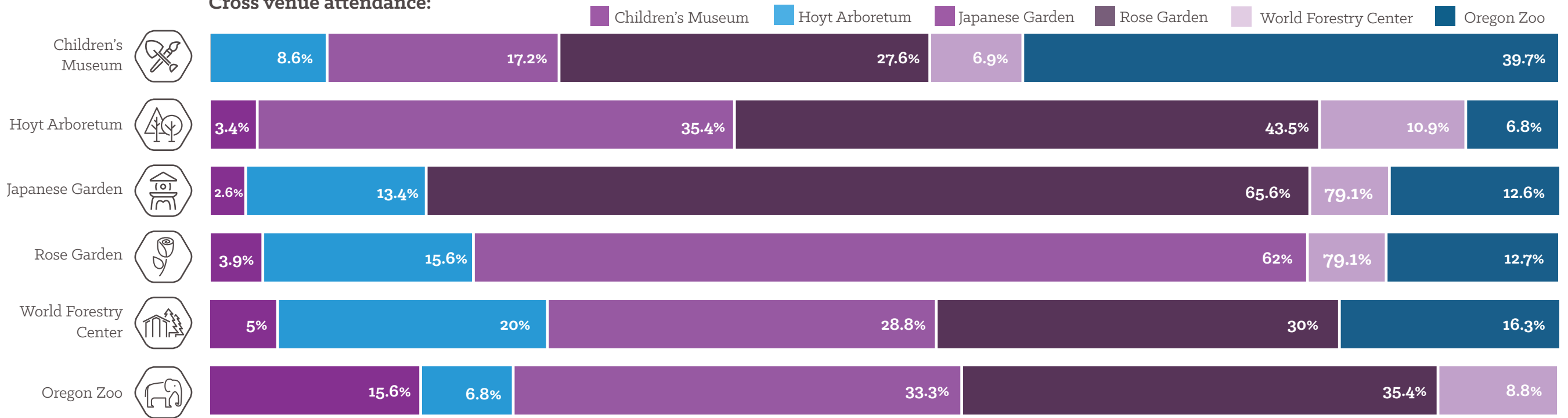


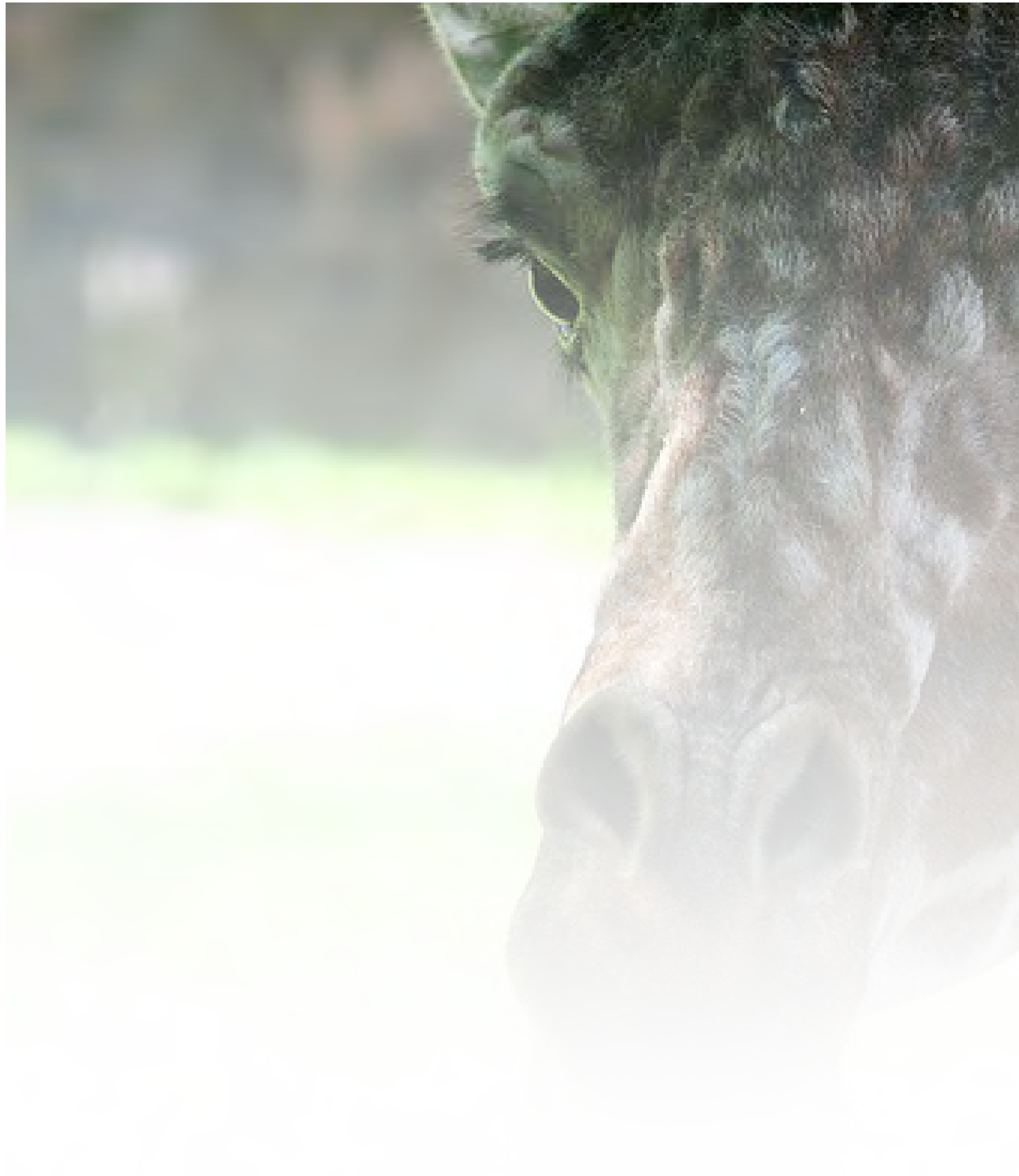
CROSS VENUE ATTENDANCE

The numerous attractions inside Washington Park provide visitors with the opportunity to curate their experience in a number of ways depending on the unique combination of attractions they choose to visit. Overall, the Portland Japanese Gardens and the Rose Garden have the highest portion of people that visit multiple venues while the Oregon Zoo and the Portland Children's Museum have the largest number of visitors attending a single venue.

Visitors choosing to visit more than one venue do so in a fairly predictable way, as there is a strong correlation between people visiting certain venues. The Oregon Zoo and Portland Children's Museum share many visitors thanks to their proximity and similar appeal to family oriented entertainment and education. We see this as well among Portland Japanese Garden and Rose Garden visitors, many of whom visit the two gardens in a single trip to Washington Park.

Cross venue attendance:



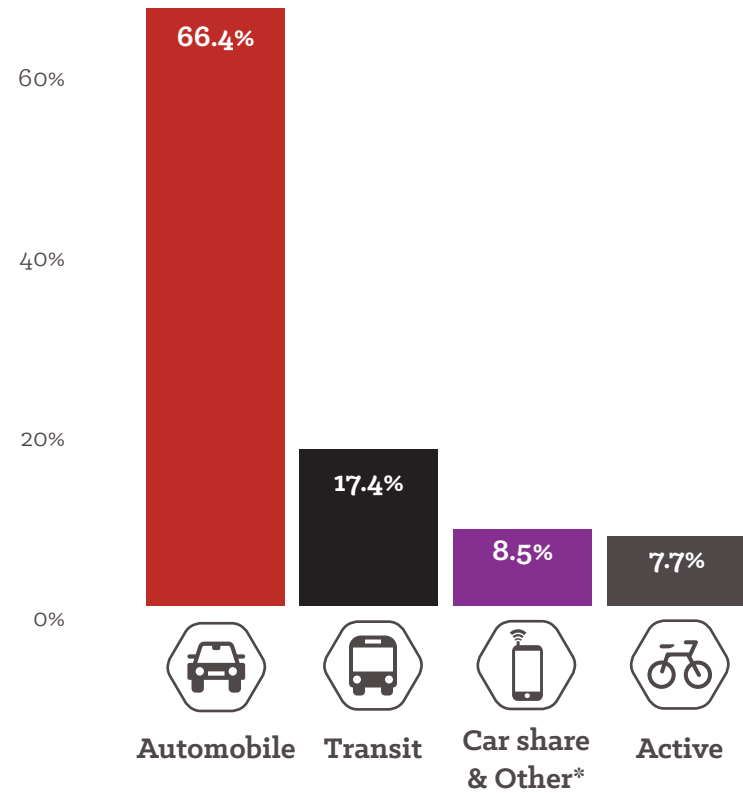


MODES

*How did they
get here?*



Mode split:

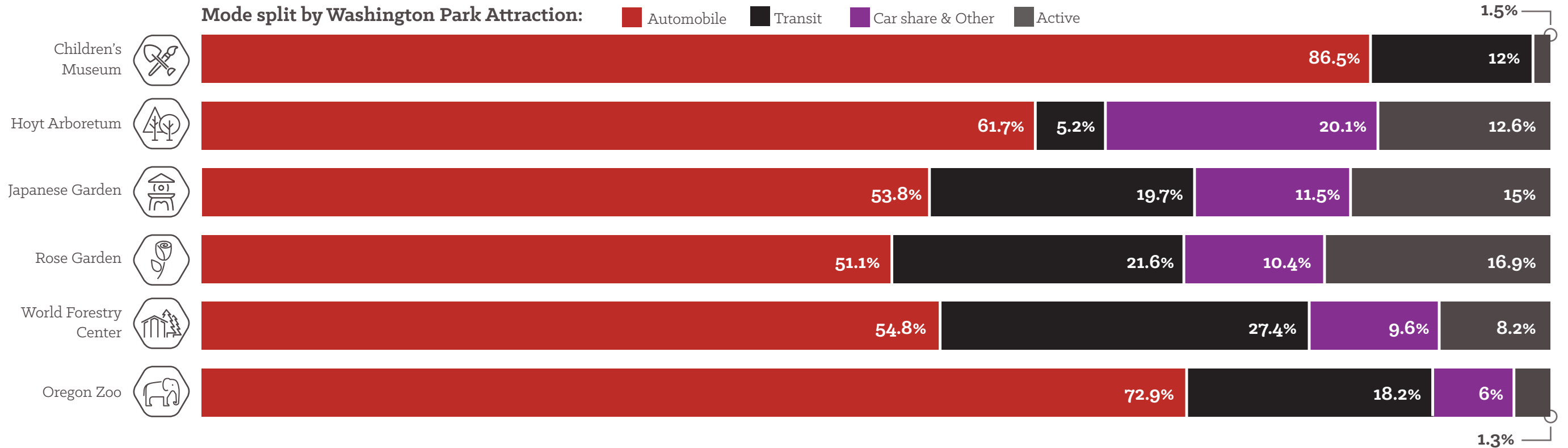


PARK VISITOR MODE SPLITS

The automobile is the predominate mode of transportation for people getting to Washington Park followed by transit, car share, and finally active modes such as walking and biking. Each of the venues exhibits their own unique mode split based on the venue’s visitor demographic and where visitors are coming from. The Oregon Zoo has a significant influence on the overall mode split of the Park seeing as it attracts the largest number of visitors each year.

The Portland Children’s Museum and Oregon Zoo have the highest proportion of visitors traveling by car, most likely due to the predominately child and young family focus of the two venues. In fact, the Portland Children’s Museum was the only venue where not a single survey respondent indicated they took transit. Conversely, the Portland Japanese Gardens and Rose Garden have the lowest automobile mode split thanks to the prevalence of tourist and higher percent of adult only visitors.

Mode split by Washington Park Attraction:

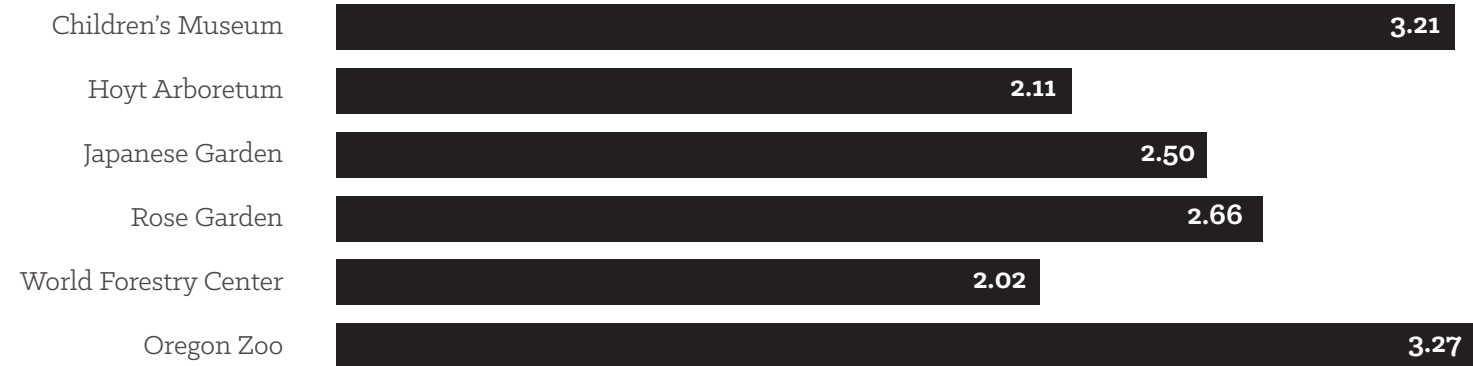


MODE SPLIT DETAILS

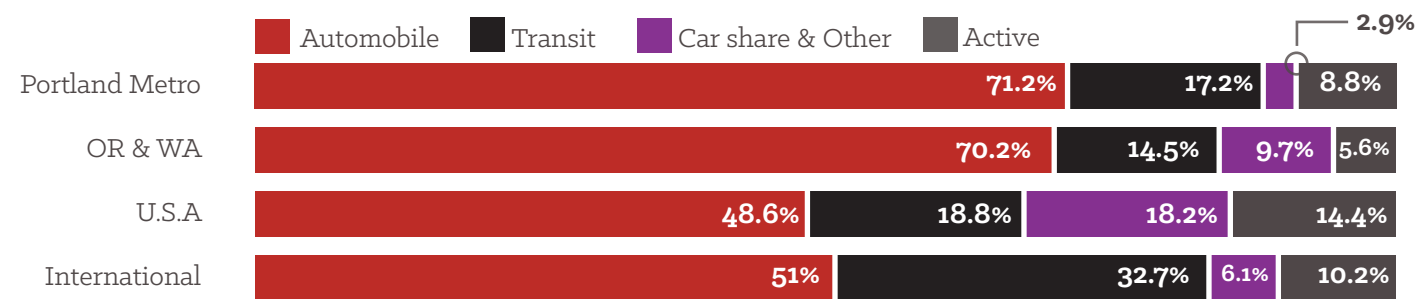
A visitor's choice of mode in getting to Washington Park is heavily correlated with several key demographics. People living in the Portland Metro area are much more likely to drive to Washington Park compared with tourists visiting from outside the Portland Metro, whom are more likely to take transit, car share, or walk. Frequency of visits also plays an important role, with first time and frequent visitors having a lower automobile mode share compared with infrequent visitors, likely because first time visitors are predominately tourists and frequent visitors come from neighborhoods closer to Washington Park and understand transit option the best.

One of the biggest factors in determining the mode of travel to the Park is the presence of children. Groups with children are 50% more likely to drive when visiting the Park compared with groups consisting of adults only. A number of factors may be contributing to this fact, such as parents not feeling comfortable brining their children on transit, the added inconvenience of strollers on transit, and the extra time that transit can take.

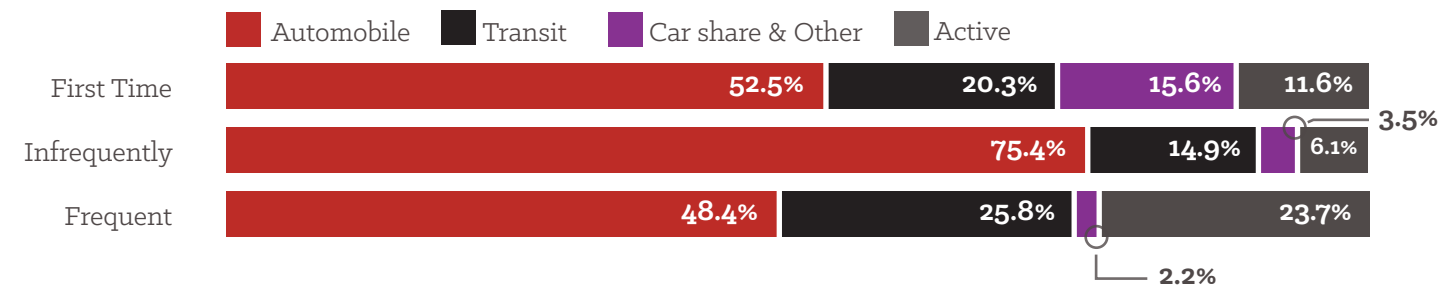
Passengers per private vehicle:



Mode Split based on where they are coming from:



Mode split based on visitor frequency:

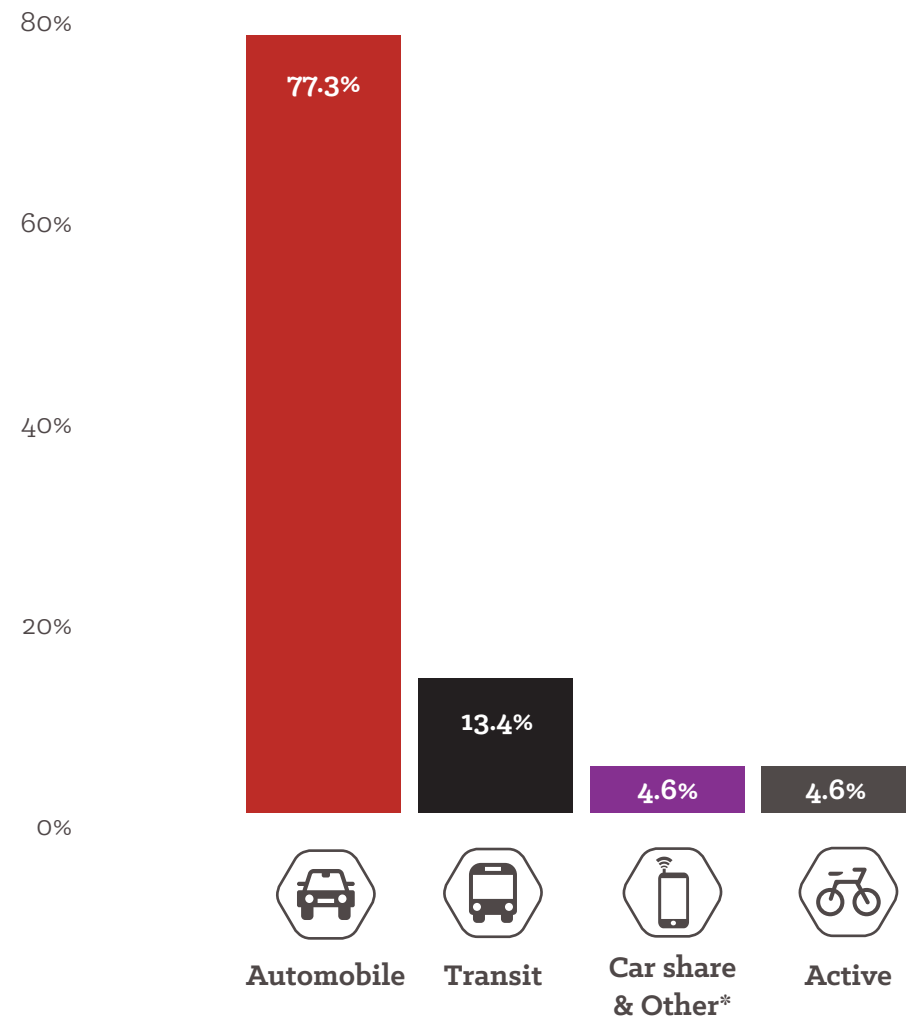


MODES

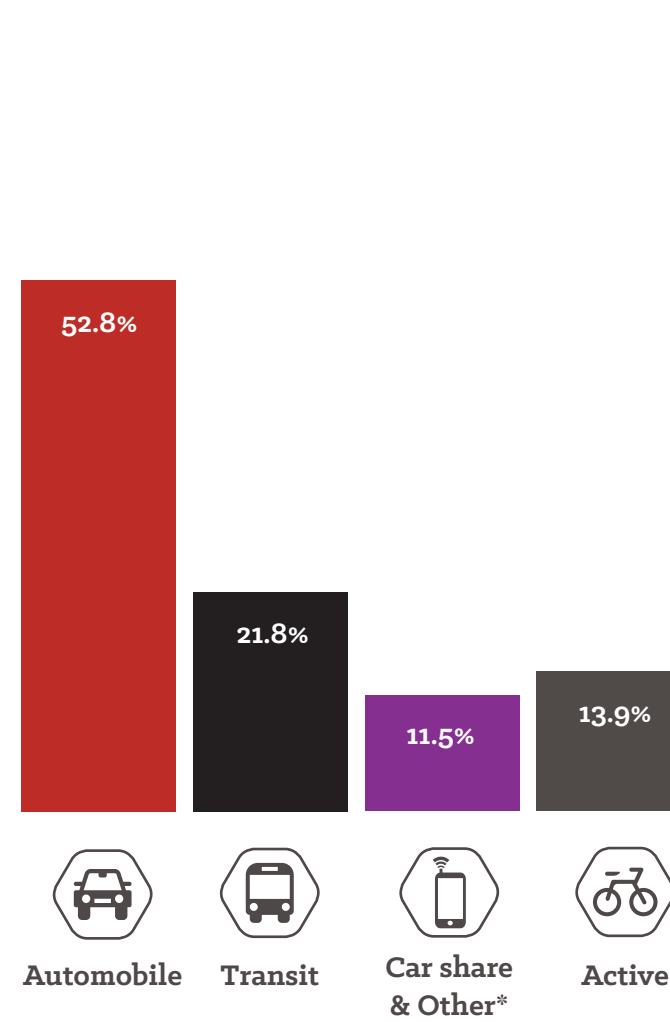


MODES

Groups with older children, mode split:



Adult only, mode split:



Non-member mode split:



Member mode split:





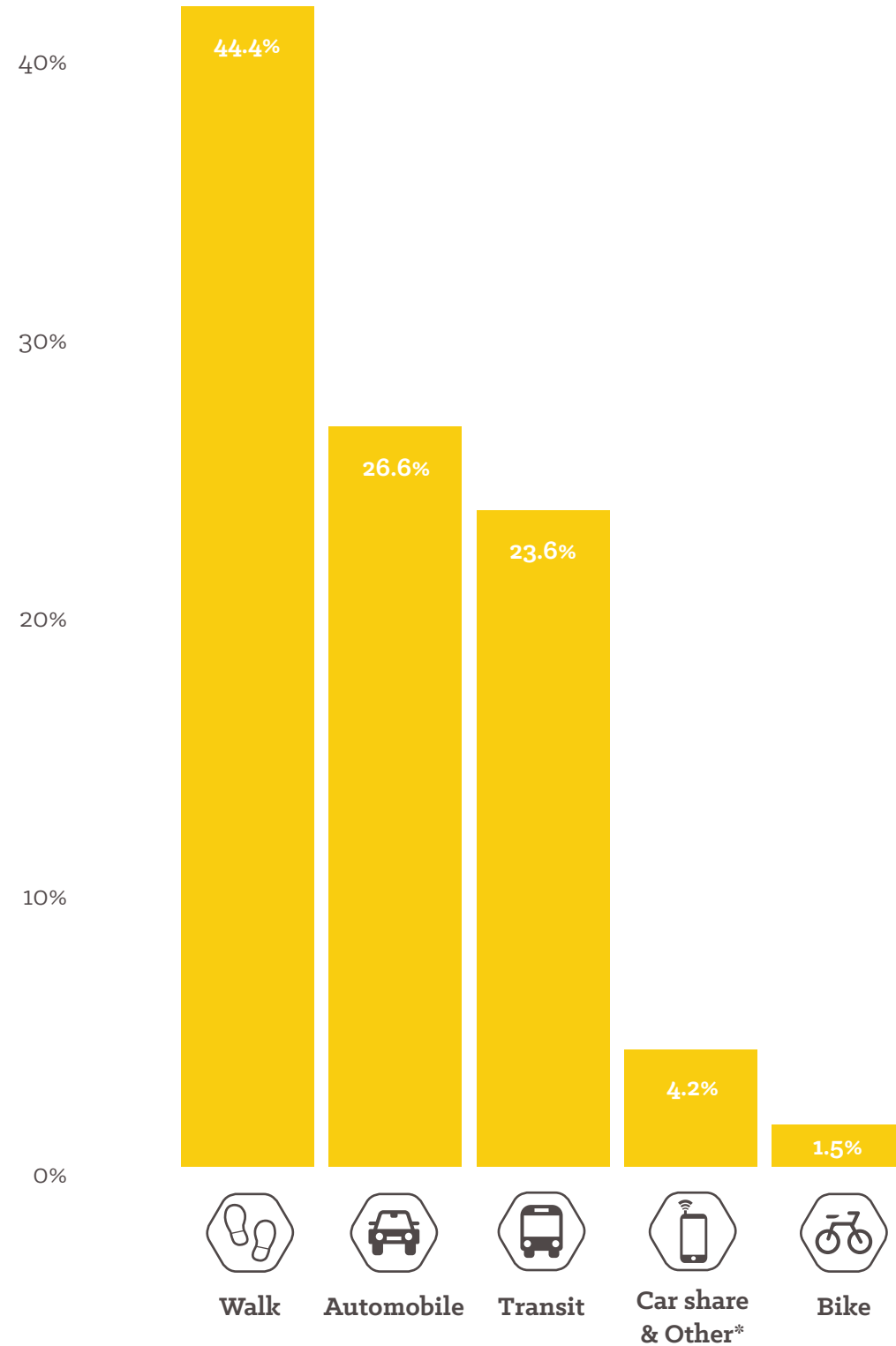
MOVEMENT

*How did they
get around
the Park?*



MOVEMENT

Mode split of people getting around within the Park:



VISITOR MOVEMENT WITHIN THE PARK

Walking is the predominate mode of travel within Washington Park to get in-between venues followed closely by the automobile and then the free shuttle coming in third. Venues that are close to each other have the most cross-over attendance which is mostly accomplished by Park visitors walking between the venues, 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.

Approximately one quarter of visitors 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 3 pm and then quickly falling off as Park venues close around 5 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.

People Visiting Multiple Attractions:



People Using the Shuttle:



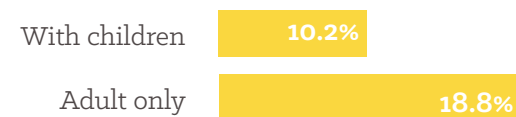
How Shuttle Riders Get to the Park:



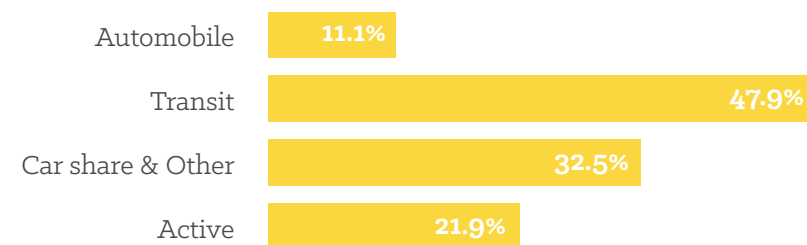
Where Shuttle Riders Came From:



Shuttle ridership by family type:



Proportion of visitors by mode of travel whom take the Shuttle:



VISITOR SHUTTLE USE

Shuttle riders are predominately made up of tourists coming from outside of Washington and Oregon. 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. Two thirds of free shuttle riders arrived at the Park via transit, car share, or by walking or biking. Without access to a vehicle once inside the park, the free shuttle is a convenient option for exploring the Park.

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 and mostly chose to visit only a single venue, it appears that there is relatively low demand from groups with children to use the shuttle service to visit venues within Washington Park.



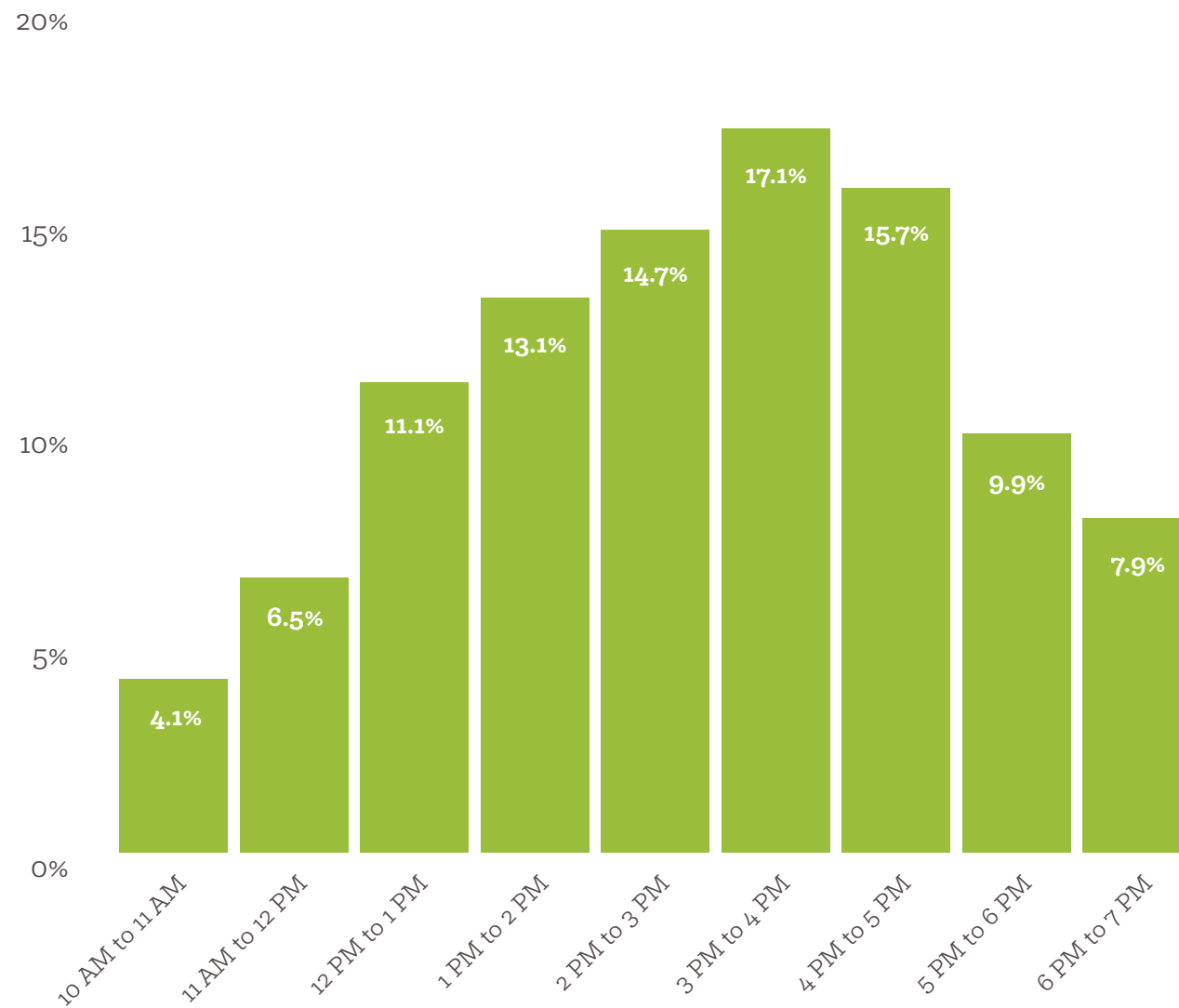
MOVEMENT



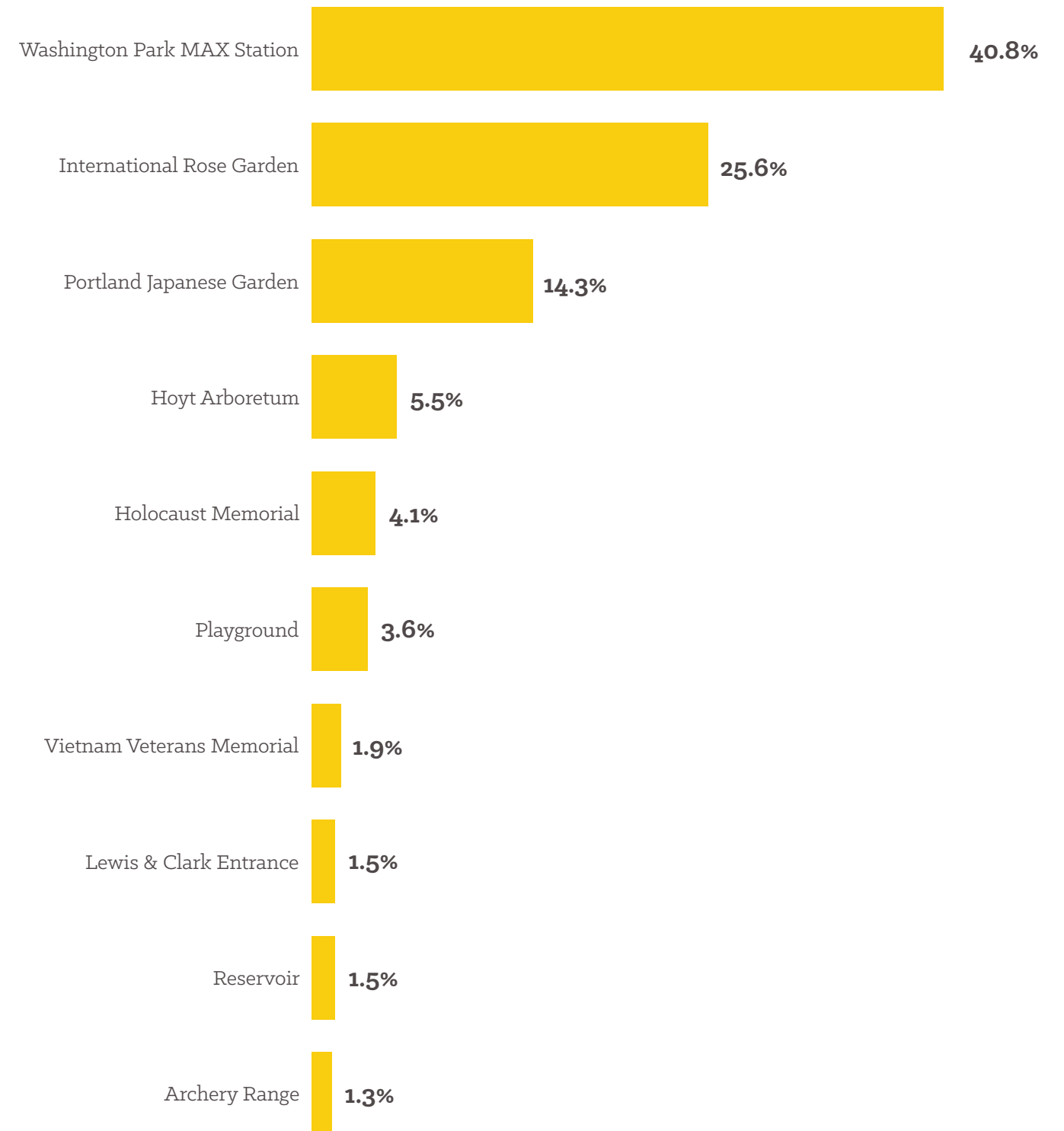
MOVEMENT

128,155

Total Shuttle Boarding May - September 2016



Most Popular Shuttle Stops:





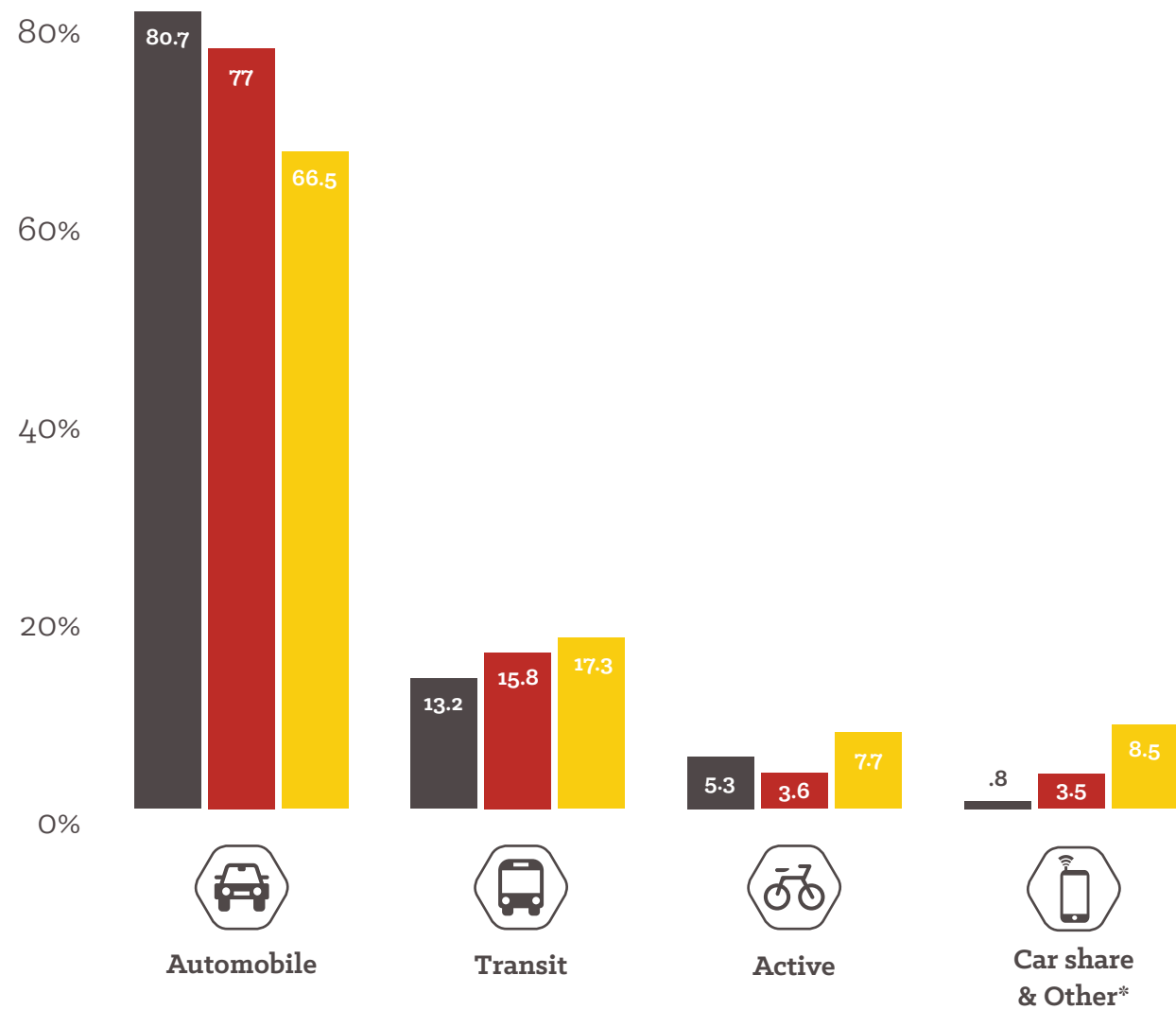
TRENDS

*How are things
changing?*

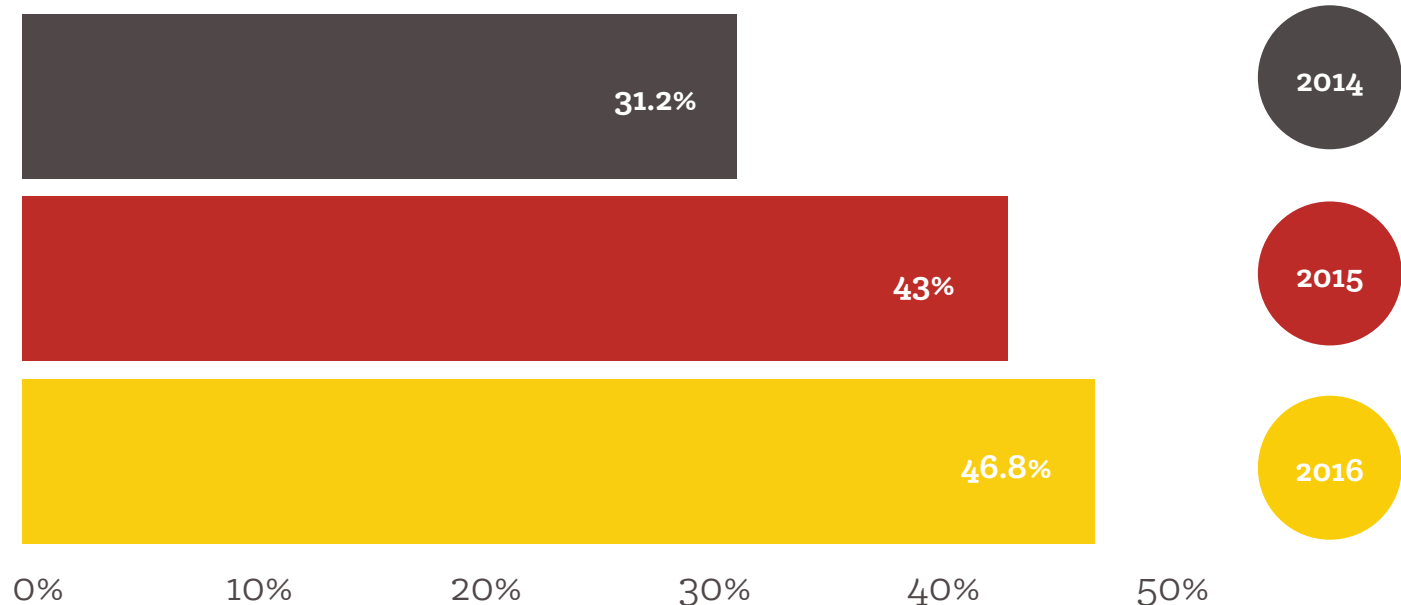


TRENDS

Park visitor mode split 2014 - 2016:



Visitors attending multiple venues 2014 - 2016:



TRANSPORTATION TRENDS SHAPING THE PARK

Car share is an increasingly important mix of how people are getting to Washington Park. Since their deployment, services such as Uber and Lyft have quickly grown to capture nearly 10% of the Park's overall mode split, this is especially true of the Japanese Garden and Rose Garden.

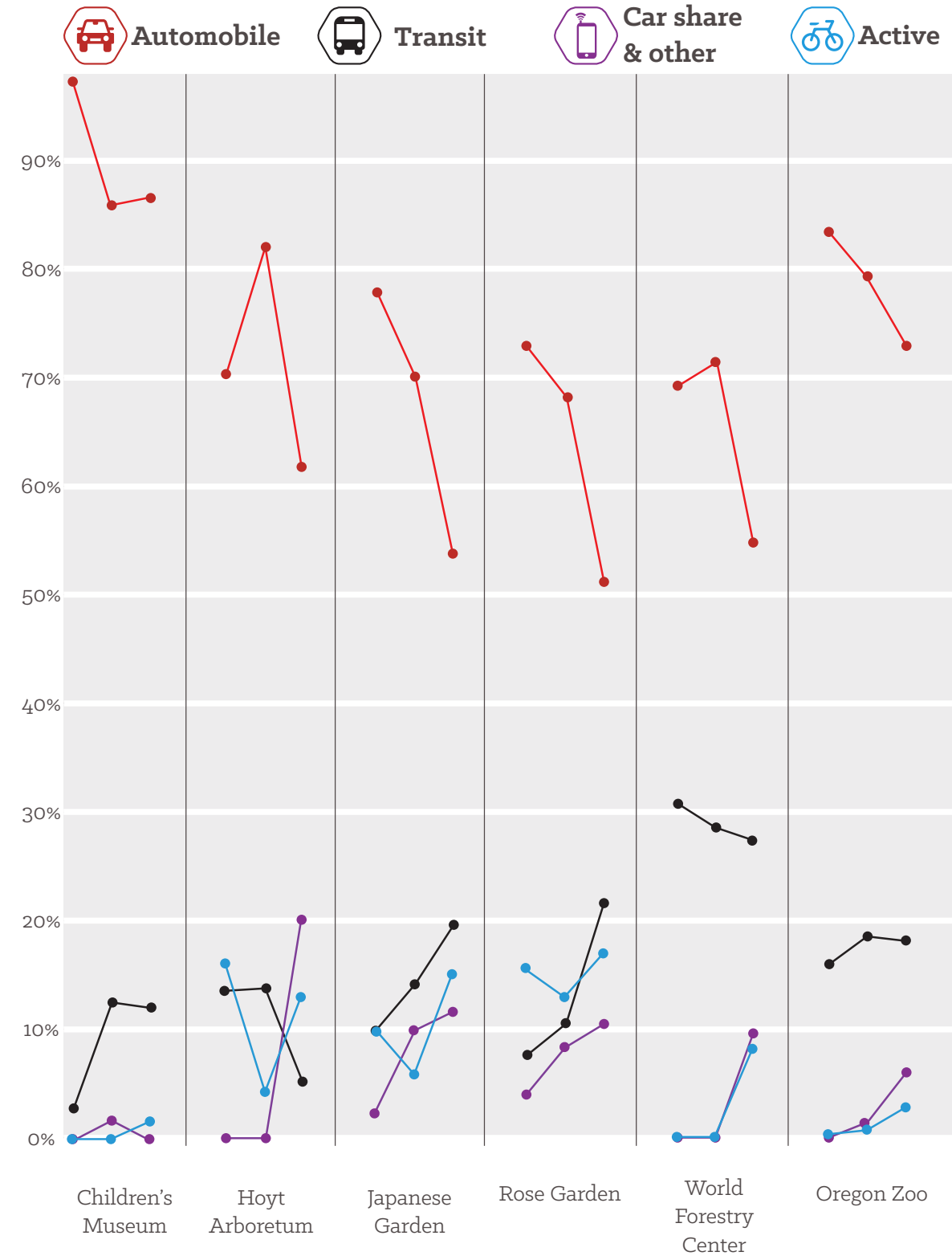
Each venue is generally showing a consistent trend for the three years from 2014 through 2016 with automobile mode split falling at each venue while transit and car share increase. The Portland Japanese Garden and Rose Garden saw the largest decreases in automobile mode split over these three years, from approximately 75 to just above 50%.

The Visitor Survey has been conducted since 2014, giving us the chance to start confidently looking at trends now that three years of data exist and discern some of the impacts that Explore Washington Park programs are having on visitor behavior. A consistent upwards trend in the number of visitors enjoying multiple

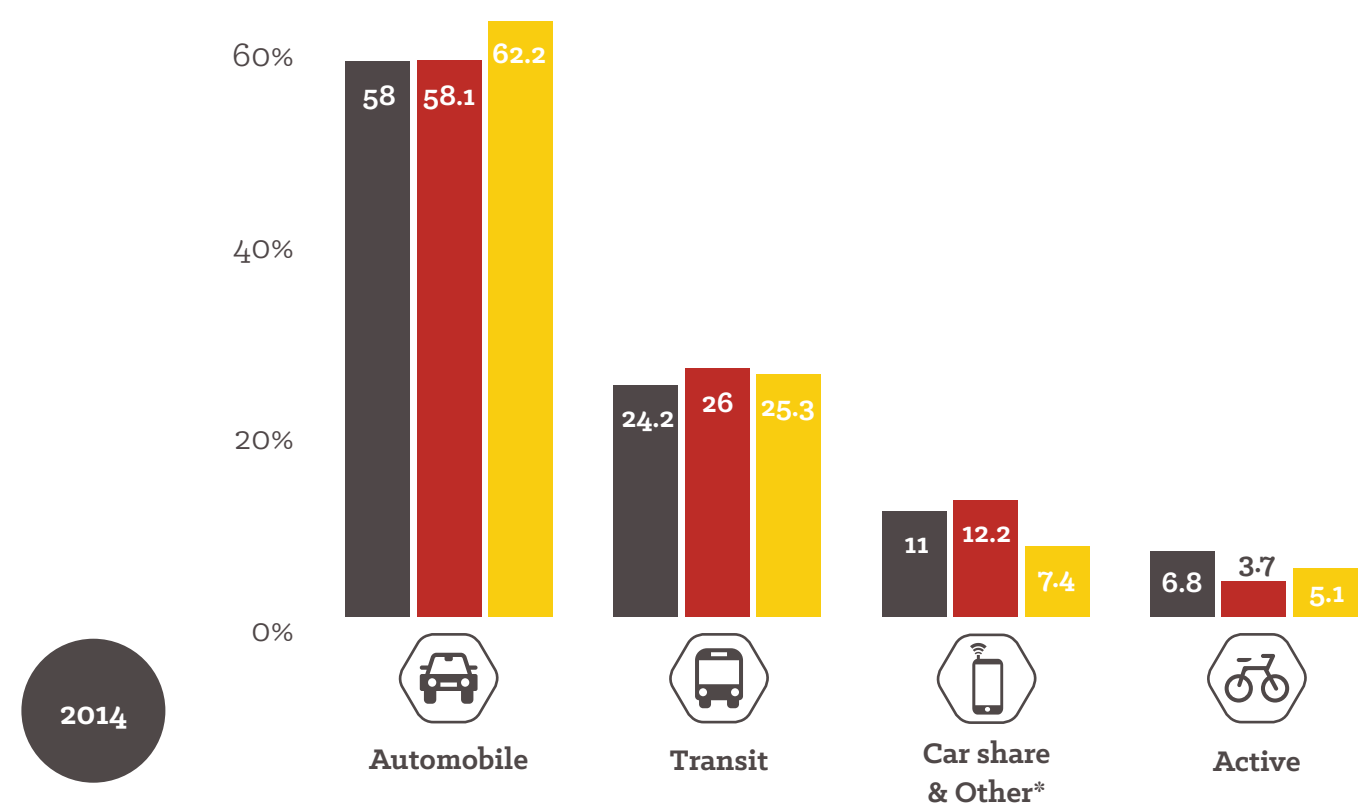
venues seem to have developed over the last three years, increasing from 31 to 46%. This trend, in conjunction with increased shuttle ridership numbers, might be partly explained by the increase in improved branding and visibility of the free shuttle service, resulting in people exploring more of the Park and attending multiple venues

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. While the proportion of first time visitors held steady at around 45%, infrequent visitors have increased from 23 to 38% while frequent visitors have seen a decrease from 30 to 18%.

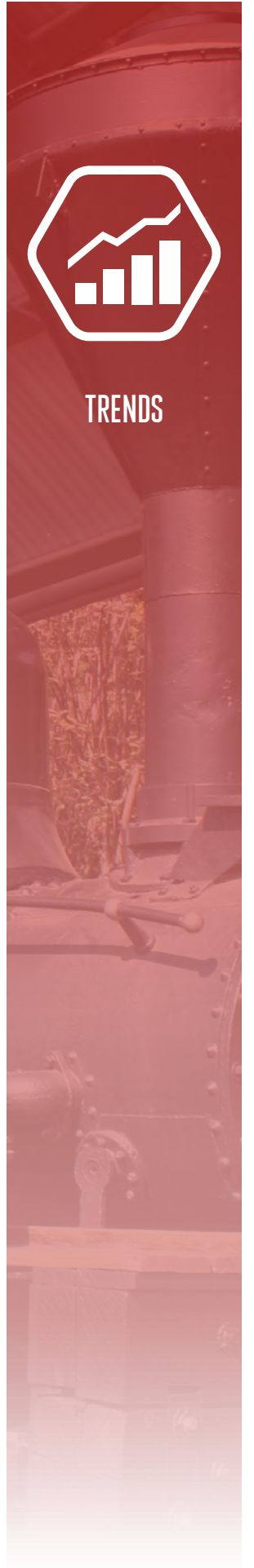
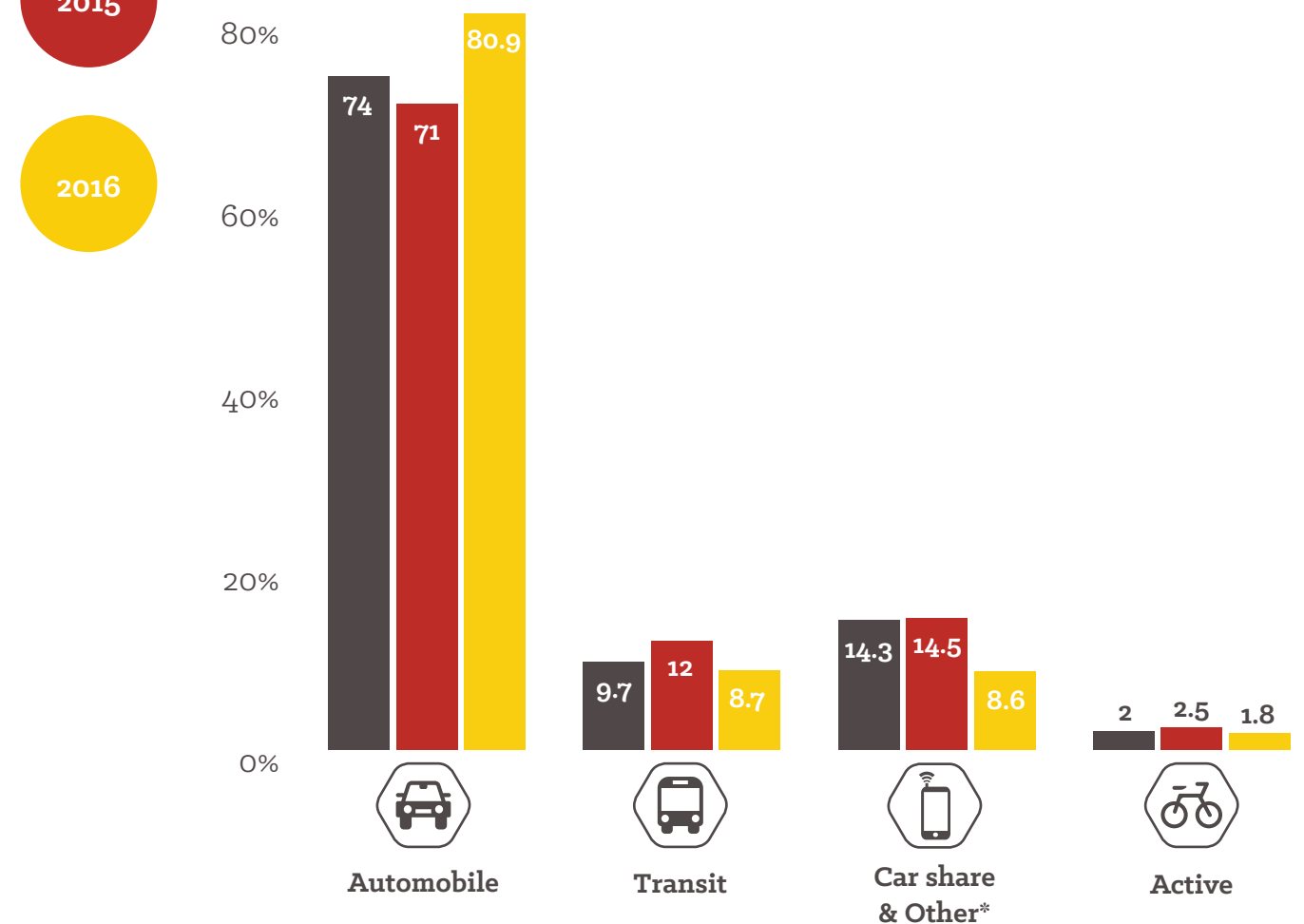
Venue mode split trend 2014 - 2016:



Employee mode split: 2014 - 2016:



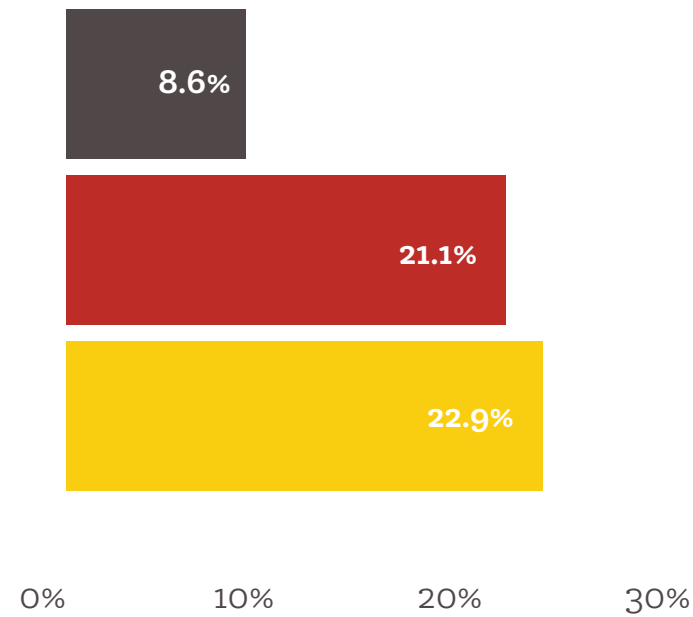
Volunteer mode split: 2014 - 2016:



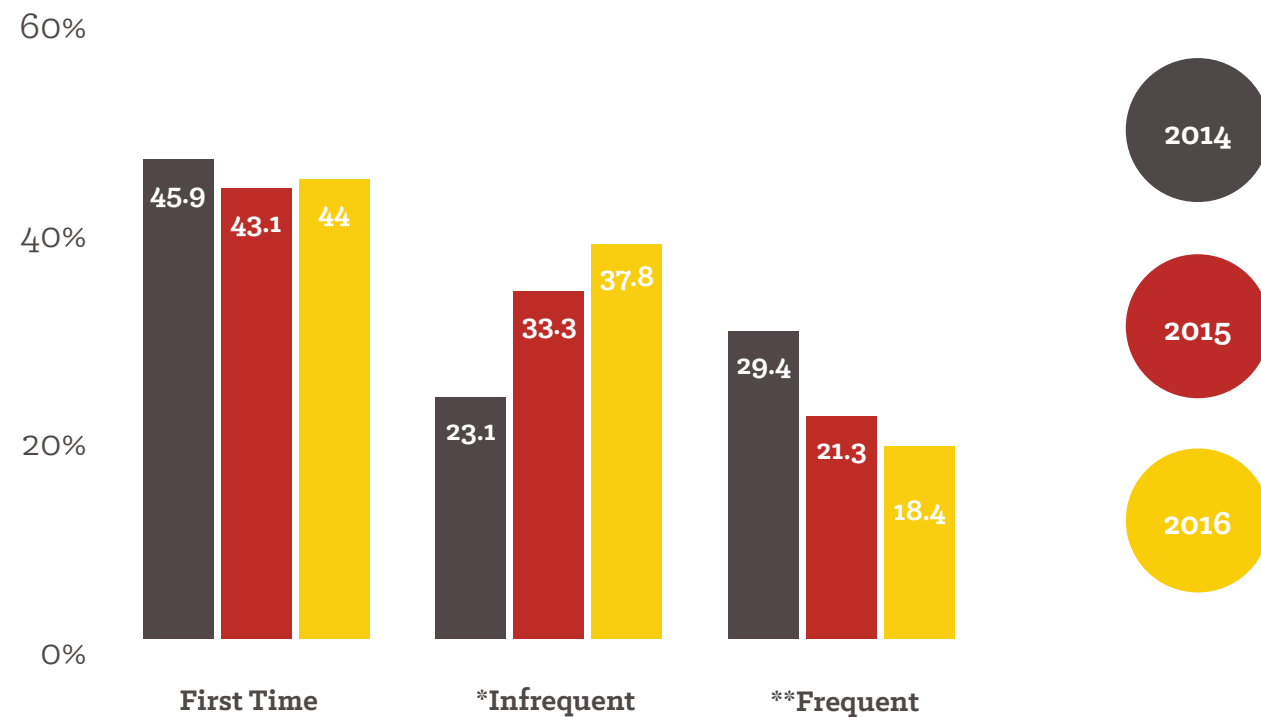


TRENDS

Park visitors using the intra-park shuttle:



Frequency of visits 2014 - 2016:



*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.

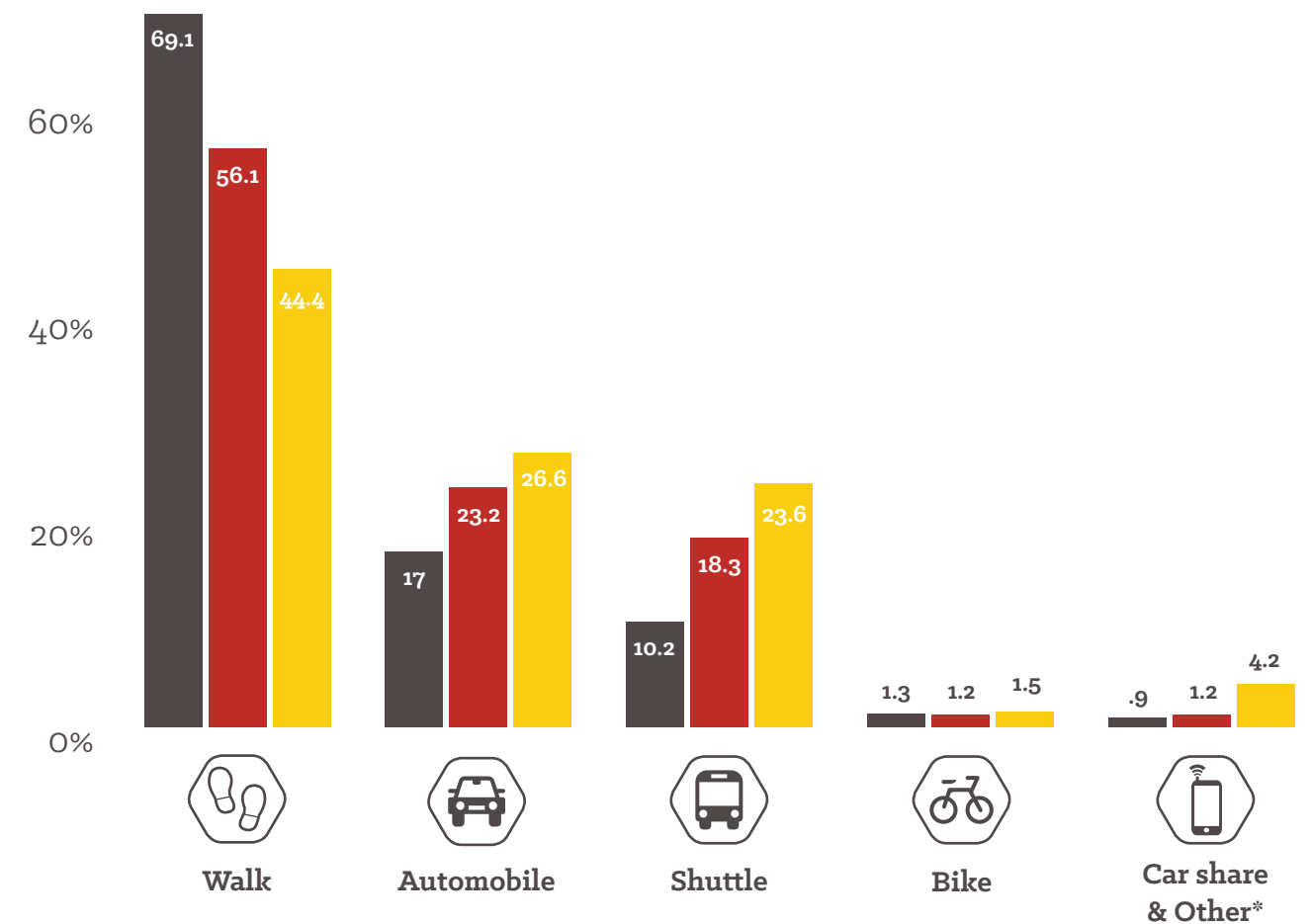
INTRA-PARK TRENDS

Overall mode split for the park is showing the same trends appearing at the venue level, with automobile mode share decreasing from 80 to 67% while transit, car share, walking, and biking take up more of the overall mode split. This shift represents a 18% decrease in automobile mode share compared with a 31% increase for transit, 45% increase for active modes, and a 962% increase for car share.

growth over the three years measured. However, one big difference is the fact that more people indicated that they are choosing to drive within the park, almost doubling from 17 to 35% in three years and that less people are choosing to walk between destinations within the Park, decreasing from 69 to 41%. This could partially be explained by more people choosing to visit multiple attractions that are farther apart from each other, making walking between these venues a less attractive option.

Intra park mode split are generally mirroring the mode split for visitors getting to the park, with transit and car share seeing consistent

Intra-park mode split 2014 - 2016:





WASHINGTON PARK

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