Annual Transportation Report 2020

WASHINGTON PARK

Explore WASHINGTON PARK

ACKNOWLEDGMENTS

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

Anna Goldrich, *Chair, Hoyt Arboretum*
Cynthia Haruyama, *Vice Chair, Portland Japanese Garden*
Dave Malcolm, *Secretary, Sylvan Highlands Neighborhood Association*
Steve Cole, *Treasurer, at large member*
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JC Vannatta, *TriMet*
Joe Furia, *World Forestry Center*
Kathy Goeddel, *Arlington Heights Neighborhood Association*
Scott Cruickshank, *Oregon Zoo*

Explore Washington Park

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PORTLAND PARKS & RECREATION STAFF

Antonina Pattiz, *Washington Park Program Coordinator*

Portland Japanese Garden
Oregon Zoo
Hoyt Arboretum
World Forestry Center
portland children's Museum

Explore Washington Park is a 501(c)3 non-profit that helps connect people with the culture, diversity, and wonder of nature in Washington Park.

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

We strive to improve the visitor experience at Washington Park by:

- Ensuring the Park feels inclusive, safe, and easy for all visitors to get to and navigate
- Providing visitor access to free shuttles and information on Park amenities and features
- Creating tools that can better serve and support visitor needs

This year marks the 7th annual peak season transportation survey, and the first off-peak survey. 851 responses were collected during the peak season survey in August and 575 were collected for the off-peak survey in February. Surveys were conducted at the six major park institutions for the off-peak 2020 survey in February:

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

The Portland Children's Museum and World Forestry Center were closed in August due to COVID-19 and state guidelines and, therefore, were not included in the 2020 peak season survey.

We use methodology developed for us by Portland State University to collect data and track trends each year. However, due to closures, capacity limitations, and safety protocols caused by COVID-19 we had to adjust our methodology for the August survey. The adjustments included: social distancing protocols, fewer staff, changes in survey software, and the use of personal cell phones by some respondents to complete surveys. Despite the slight pivot in methodology, the survey data will help guide our activities into the COVID-19 recovery and beyond by providing insights into the following key indicators:

- Where people are visiting from
- Average number of people in each group and vehicle
- Where people park vehicles
- Use of the Washington Park Free Shuttle
- Use of public transit
- Visitor satisfaction information
- Demographic information

EXECUTIVE SUMMARY

In 2020, the COVID-19 pandemic impacted Washington Park much as it did the entire city. Institutions closed, capacities were limited, and the population was told to stay home and stay safe. The peak season survey showed the following trends that reflect this impact:

- Increases in private automobile mode split and decrease in transit
- Increase in satisfaction of travel, free shuttle, and overall park experience
- Reduction in cross-venue attendance
- Decrease in first time visits to the Park

We believe these trends will return to pre COVID-19 levels over time, but recognize that the change in behavior will create additional access challenges for the Washington Park.

The 2020 off-peak survey gives our first glimpse at transportation and park use during January and February. Though the trend lines will be the main focus in future reports, there are great insights into visitor behavior that we were not collecting data on in the past.

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How are we serving our guests?

VISITOR PROFILES

Who's coming to the Park?

TOTAL VISITORS

- There was a 56% reduction in visitors from peak season 2019 to 2020.
- Washington Park received 76% fewer visitors in January and February compared to July and August.

2019
PEAK SEASON
July - Aug

883,539

2020
PEAK SEASON
July - Aug

382,590

2020
OFF-PEAK SEASON
Jan - Feb

214,706

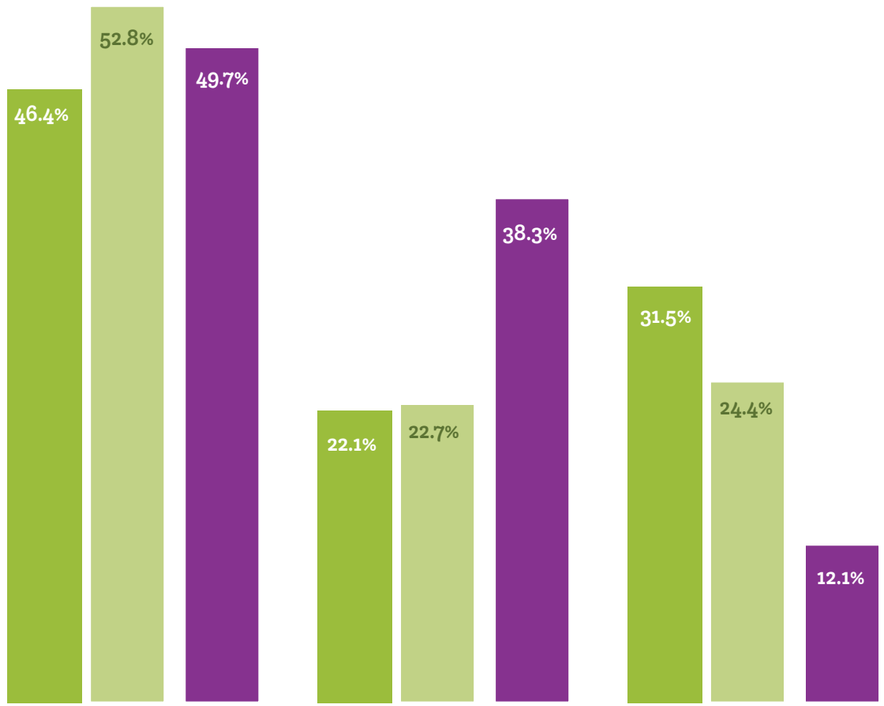
VISITOR PROFILES

VISITOR PROFILES

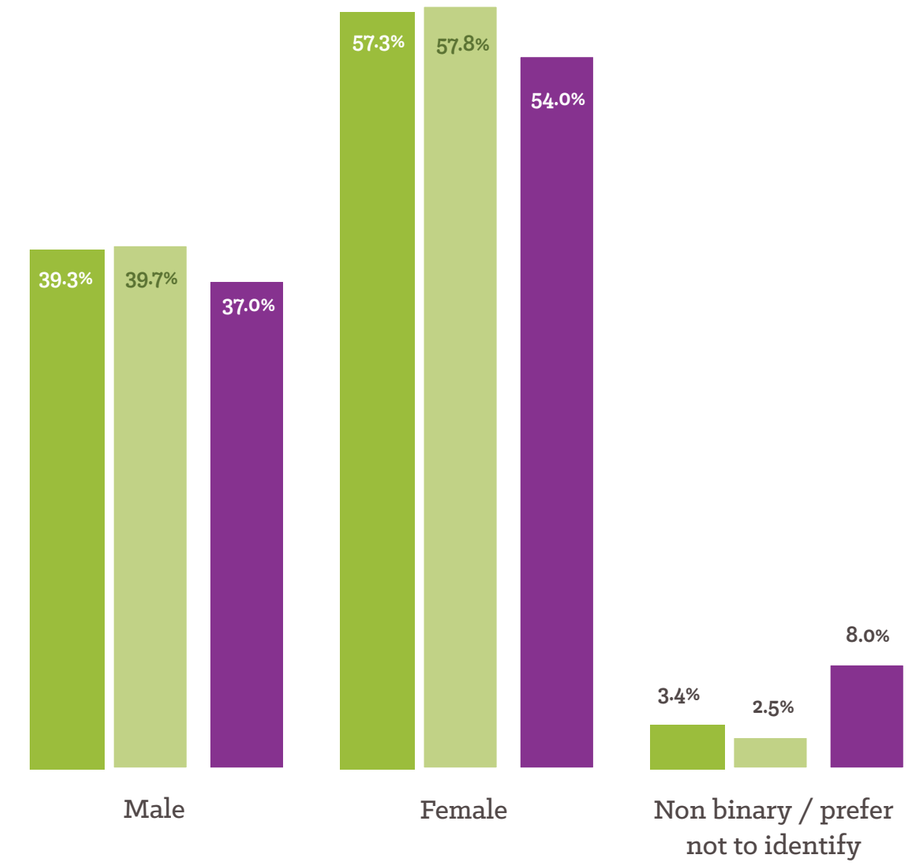
VISITOR GROUP PROFILES

Peak 2019 | Peak 2020 | Off-Peak 2020

GROUP MAKEUP



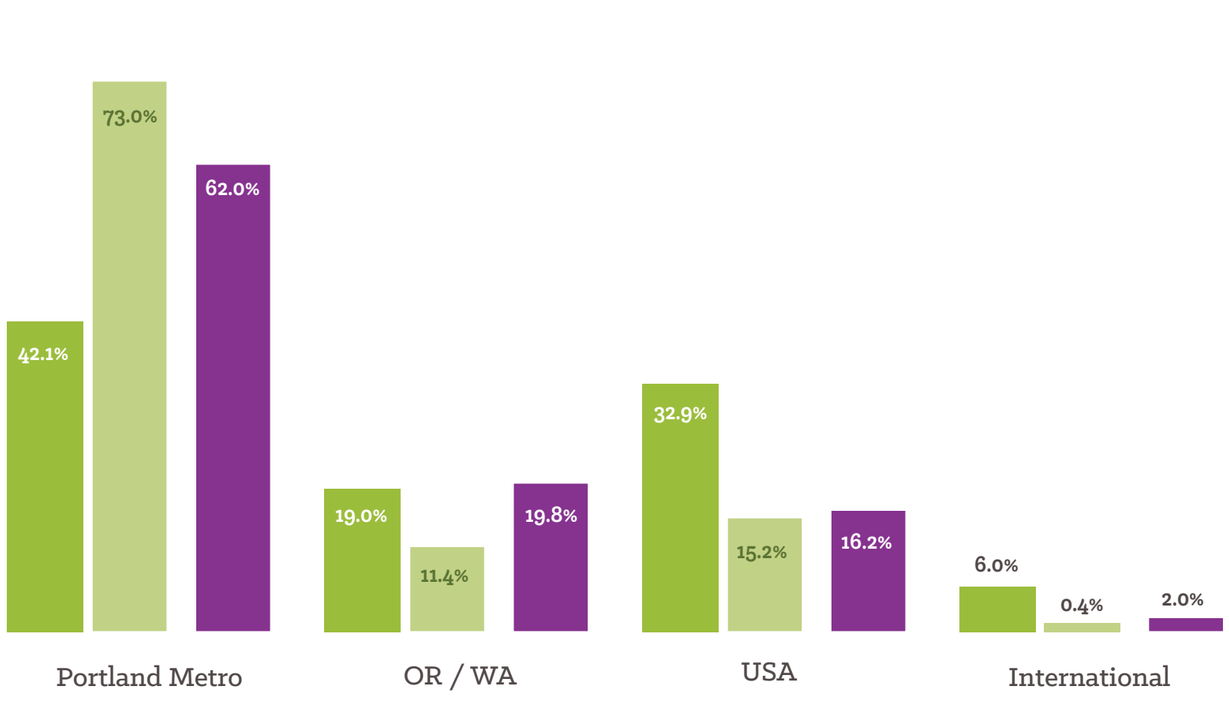
GENDER



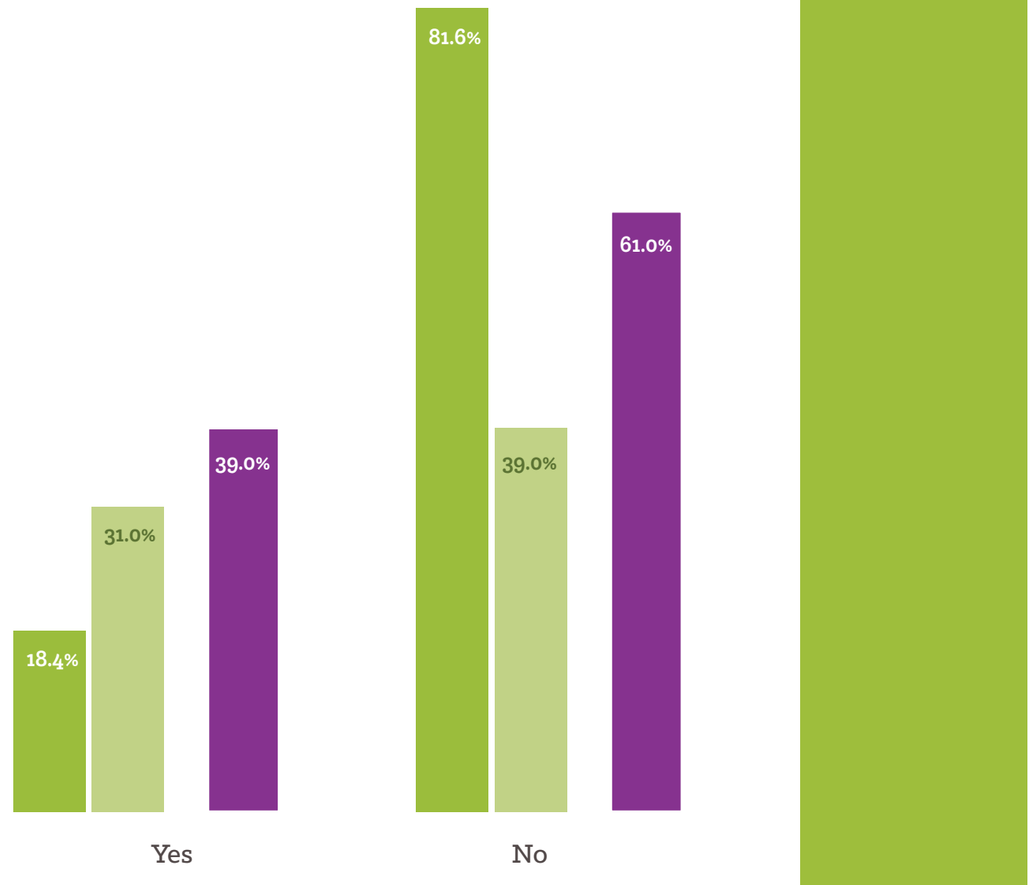
VISITOR GROUP PROFILES

Peak 2019 | Peak 2020 | Off-Peak 2020

REGION OF ORIGIN



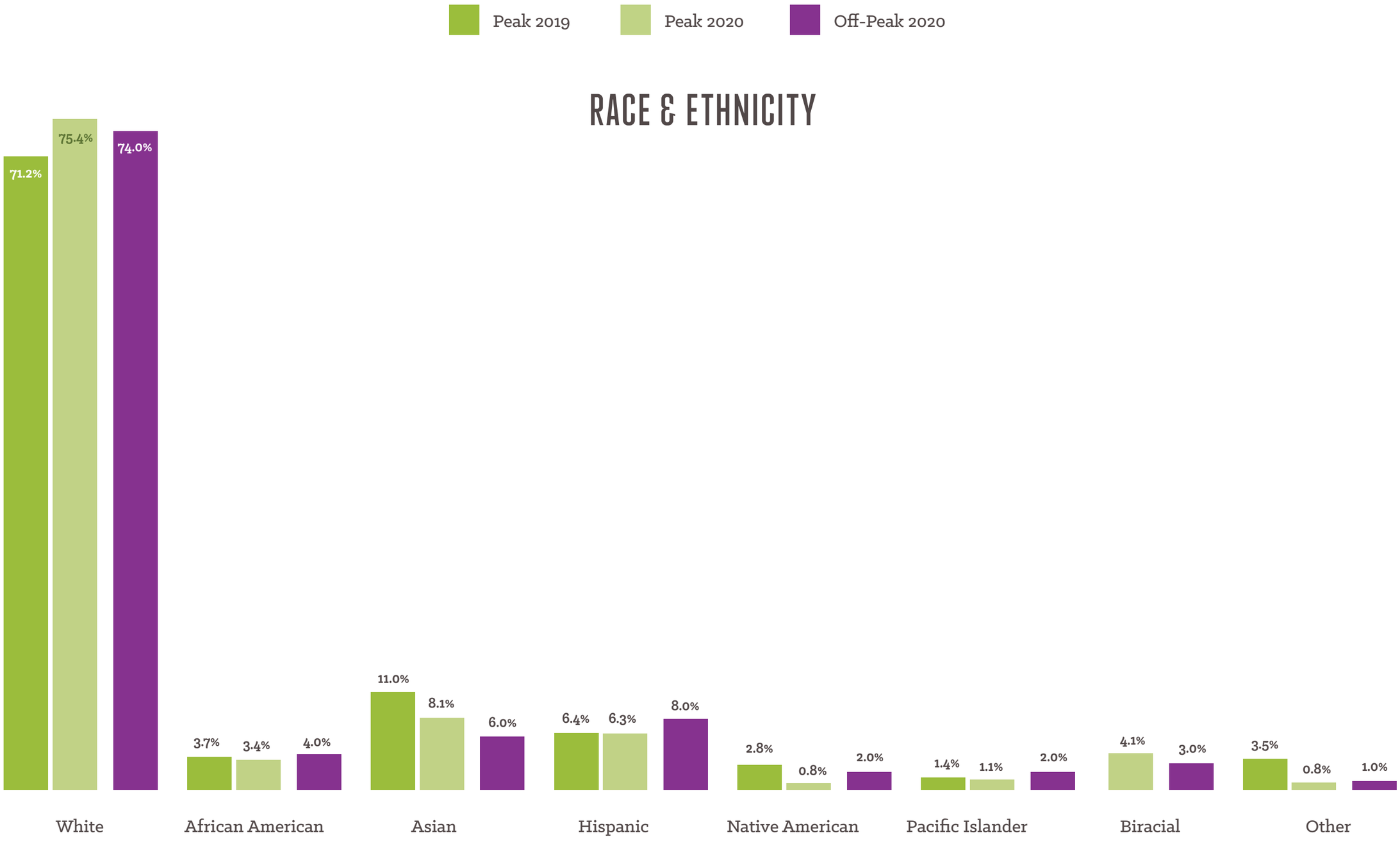
ARE YOU A MEMBER?



VISITOR PROFILES

VISITOR PROFILES

VISITOR GROUP PROFILES

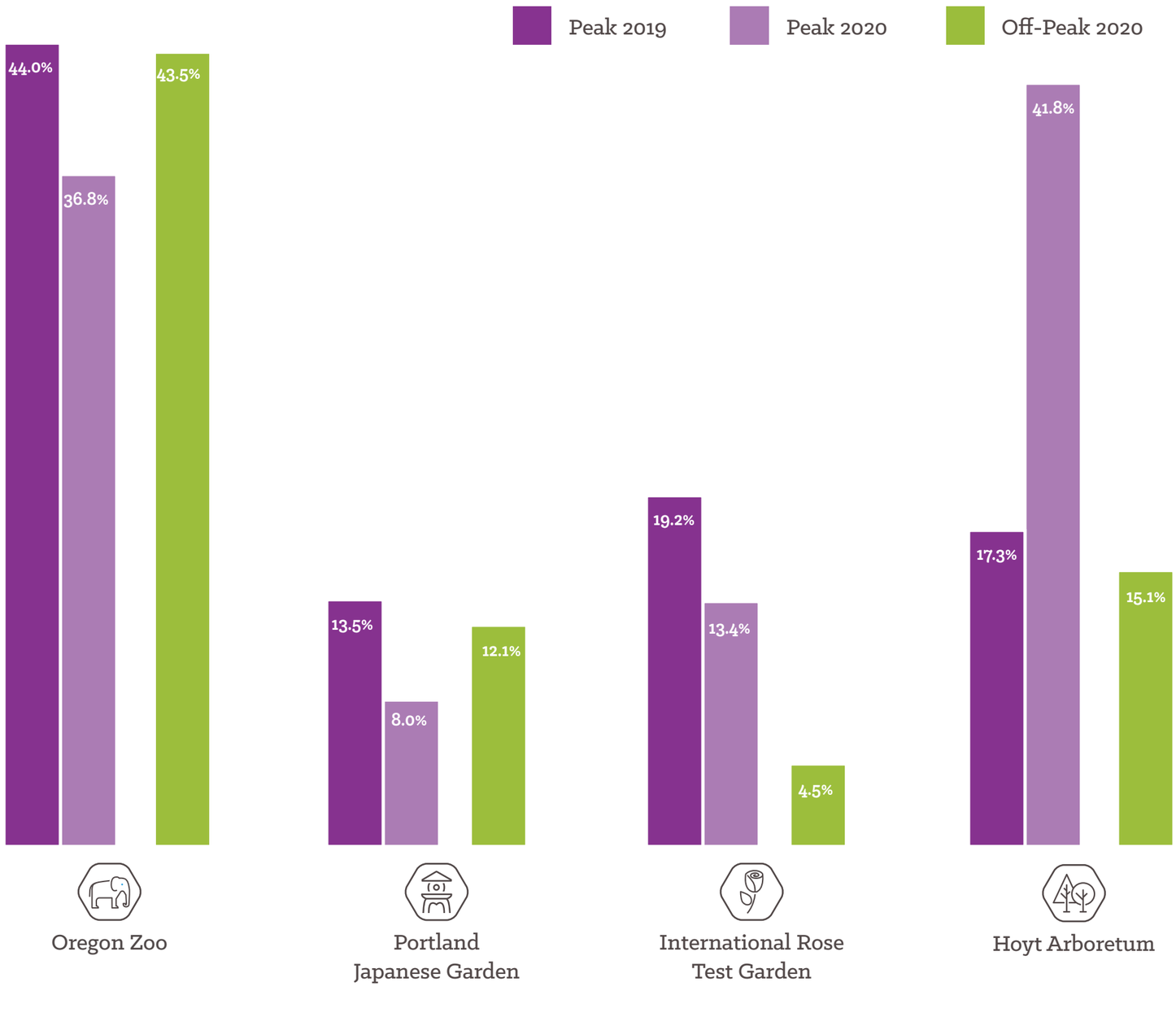


DESTINATIONS

Where are visitors going?

VISITOR DESTINATIONS

WHERE GUESTS WENT



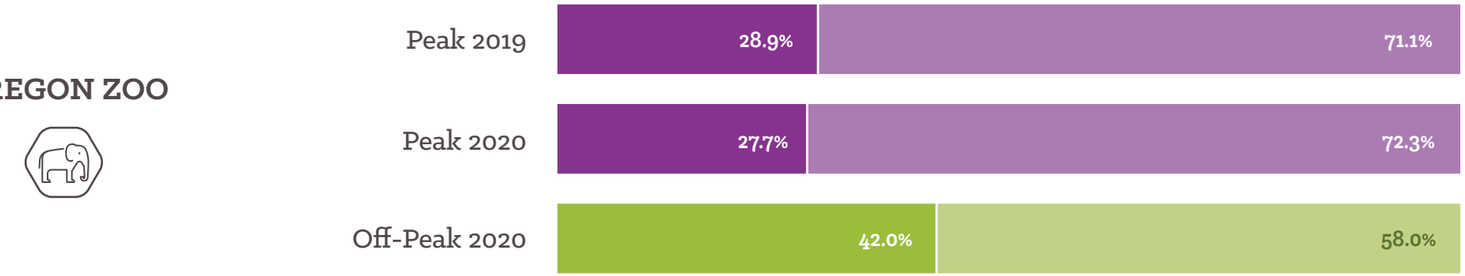
- EWP is developing methodology to better collect visitor data in hard to measure areas such as hiking trails and at memorials.
- Indoor institutions host a far greater percentage of visitors in off-peak seasons.

DESTINATIONS

VISITOR DESTINATIONS

WHO IS IN THE GROUP?

OREGON ZOO



PORTLAND JAPANESE GARDENS

WHO IS IN THE GROUP?

HOYT ARBORETUM

PORTLAND CHILDREN'S MUSEUM

WORLD FORESTRY CENTER DISCOVERY MUSEUM

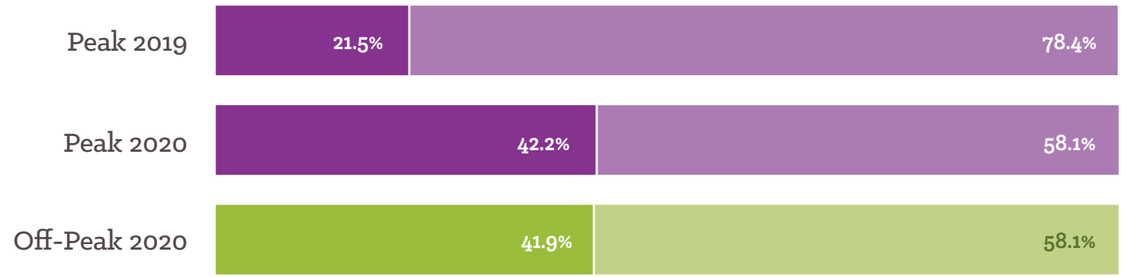
DESTINATIONS

VISITOR DESTINATIONS

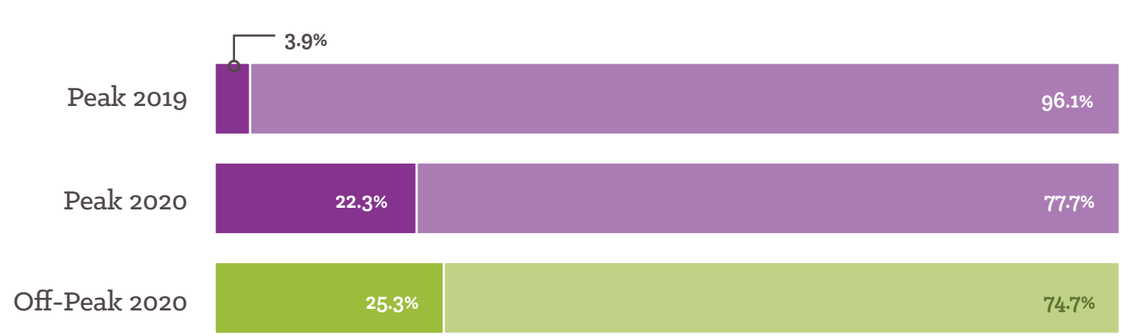
- Members are a significantly larger presence in the Park during COVID-19 and off-peak.

ARE THEY VENUE MEMBERS?

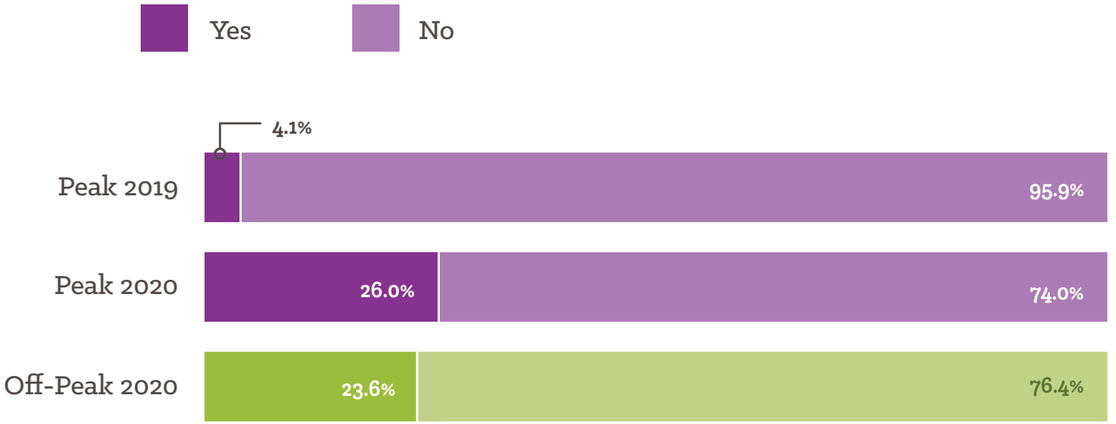
OREGON ZOO



PORTLAND JAPANESE GARDENS



ARE THEY VENUE MEMBERS?



VISITOR DESTINATIONS

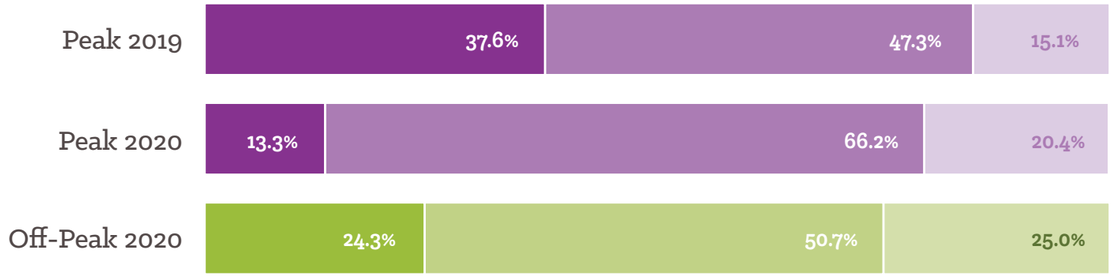
- First time visitors were significantly less prevalent in 2020.

HOW FREQUENTLY DO THEY VISIT?

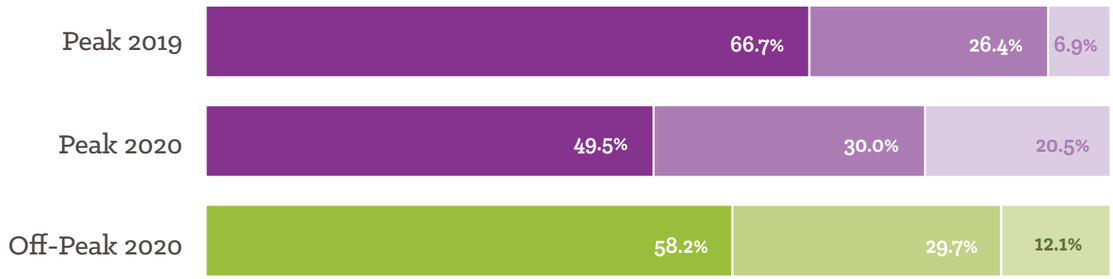
First Visit | Infrequently* | Frequently**

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

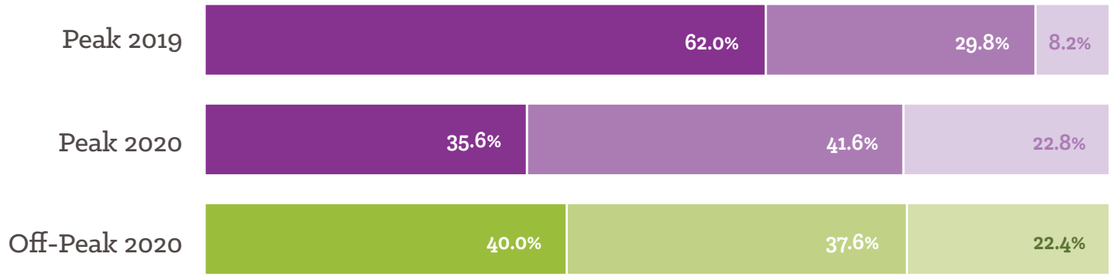
OREGON ZOO



PORTLAND JAPANESE GARDENS



INTERNATIONAL ROSE TEST GARDEN



HOW FREQUENTLY DO THEY VISIT?

First Visit Infrequently* Frequently**

**Infrequent visitors are those who visit Washington Park less than once per month.*
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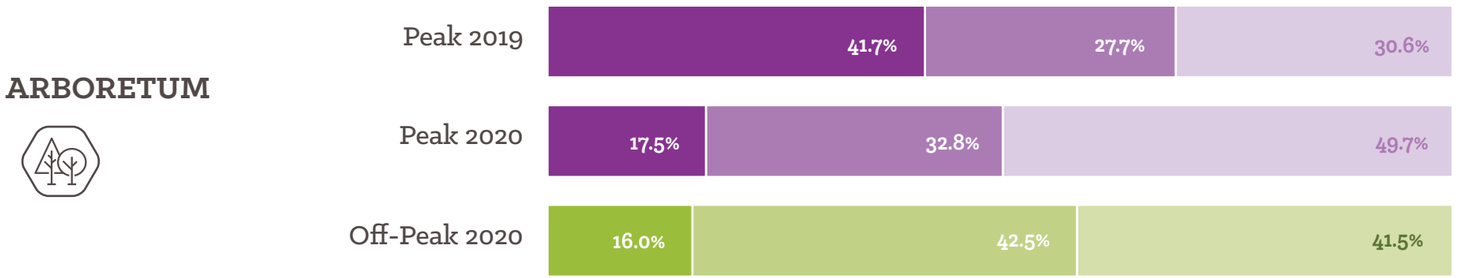
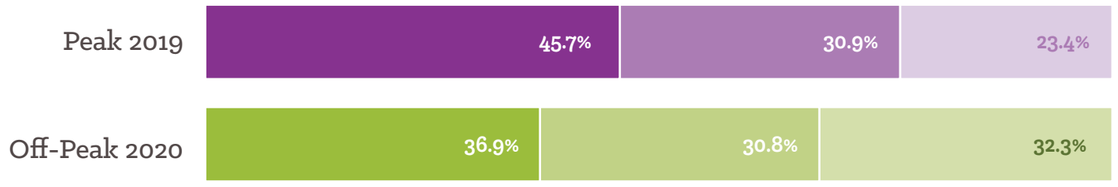
HOYT ARBORETUM



PORTLAND CHILDREN'S MUSEUM

WORLD FORESTRY CENTER DISCOVERY MUSEUM



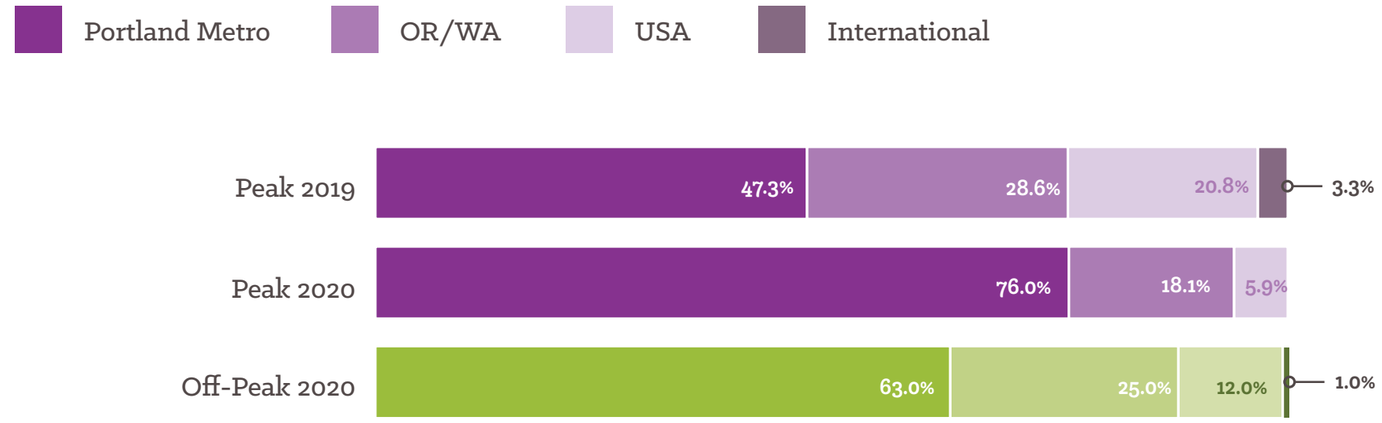
DESTINATIONS

VISITOR DESTINATIONS

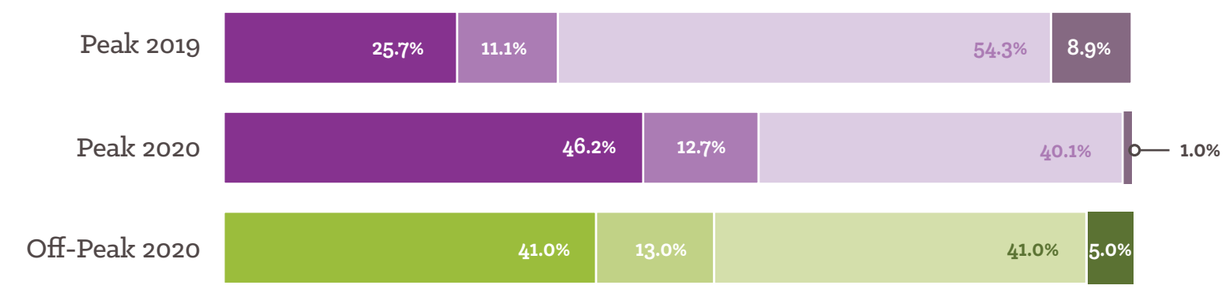
- In 2020, Washington Park visitors were majority local with 73% in the peak and 62% off-peak up from 42%.
- International visitors were greatly reduced since 2019 from 6% of total visitors to .4% in peak 2020.

WHERE ARE THEY COMING FROM?

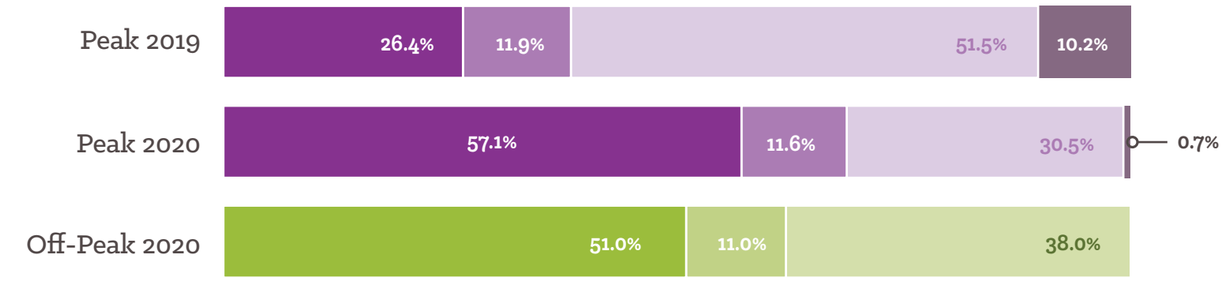
OREGON ZOO



PORTLAND JAPANESE GARDENS



INTERNATIONAL ROSE TEST GARDEN



VISITOR DESTINATIONS

WHERE ARE THEY COMING FROM?

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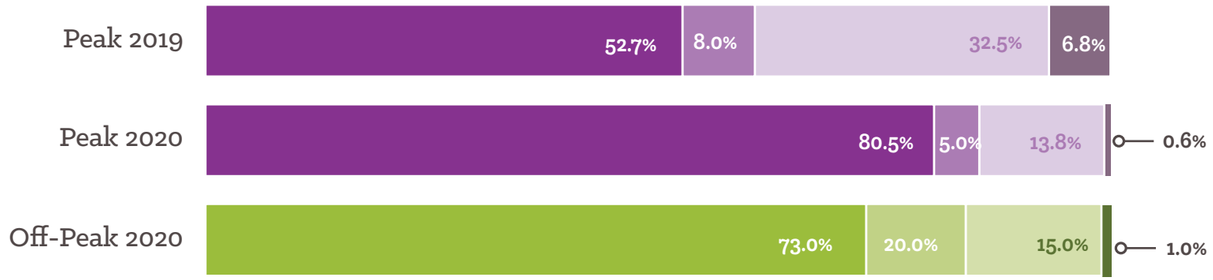

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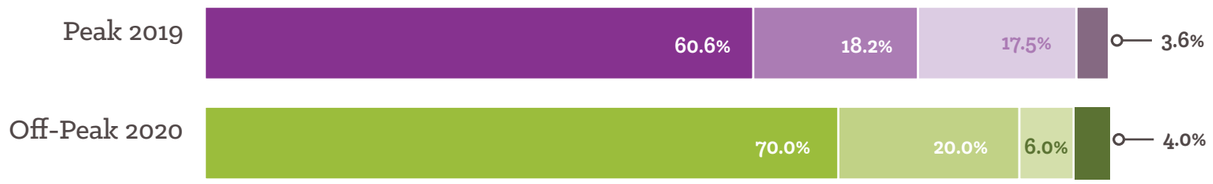
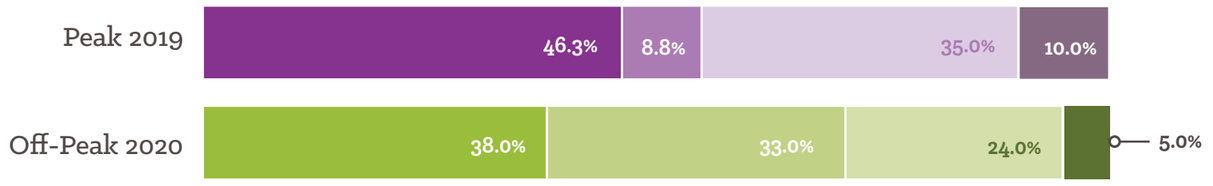


WORLD FORESTRY CENTER DISCOVERY MUSEUM

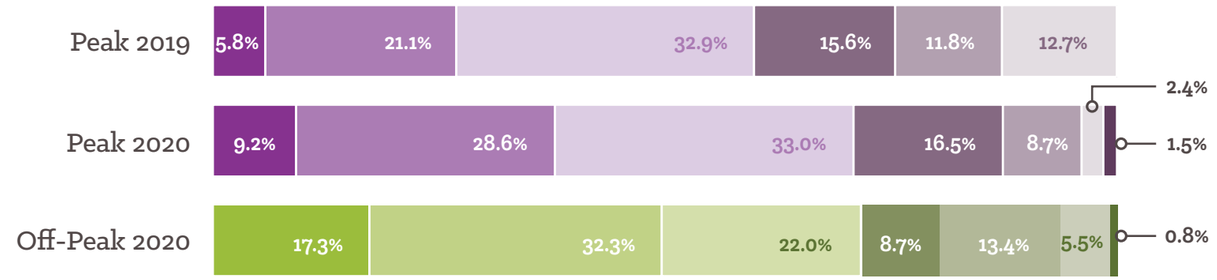


VISITOR DESTINATIONS

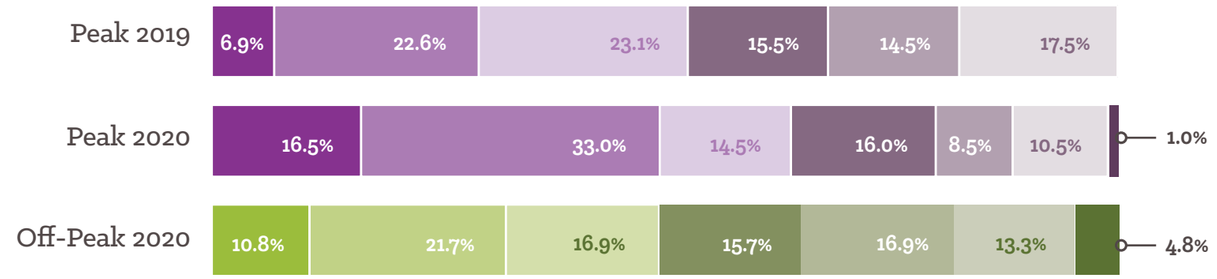
- A larger proportion of visitors were under 55 in 2020 at all institutions

SURVEY RESPONDENT AGE

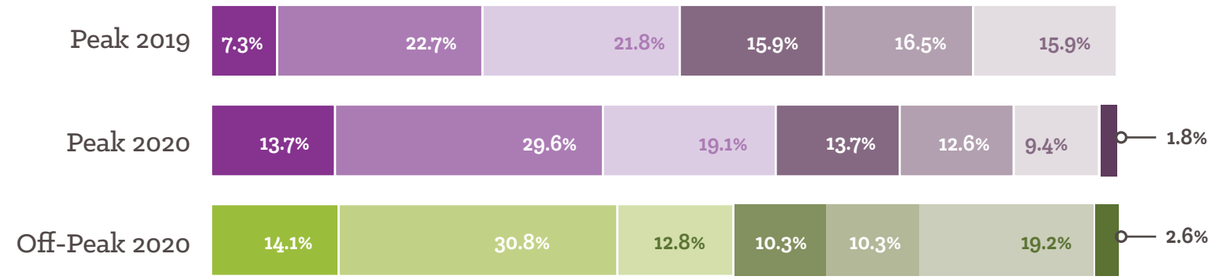
OREGON ZOO



PORTLAND JAPANESE GARDENS

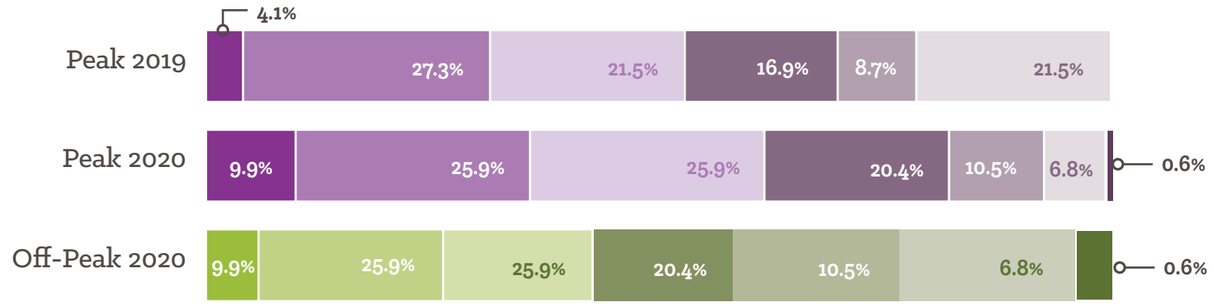


INTERNATIONAL ROSE TEST GARDEN

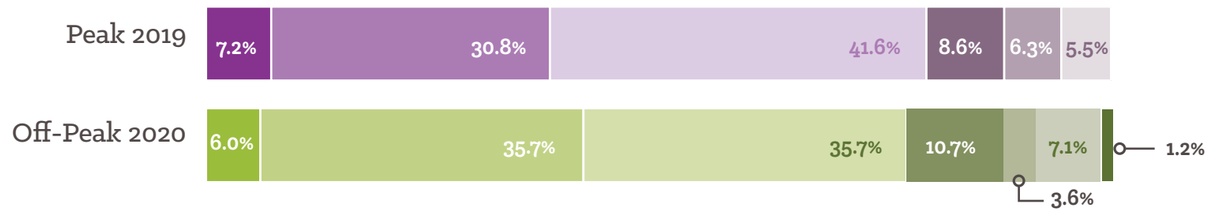


SURVEY RESPONDENT AGE

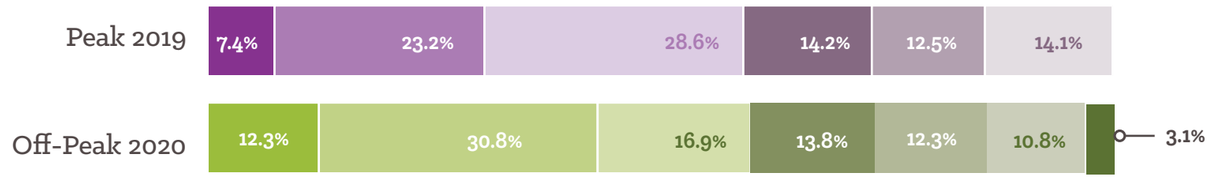
HOYT ARBORETUM



PORTLAND CHILDREN'S MUSEUM



WORLD FORESTRY CENTER DISCOVERY MUSEUM



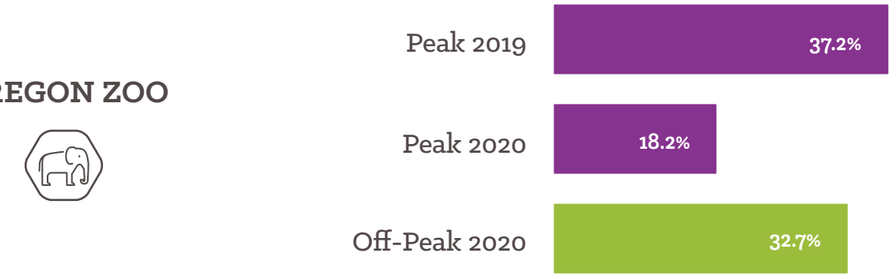
DESTINATIONS

VISITOR DESTINATIONS

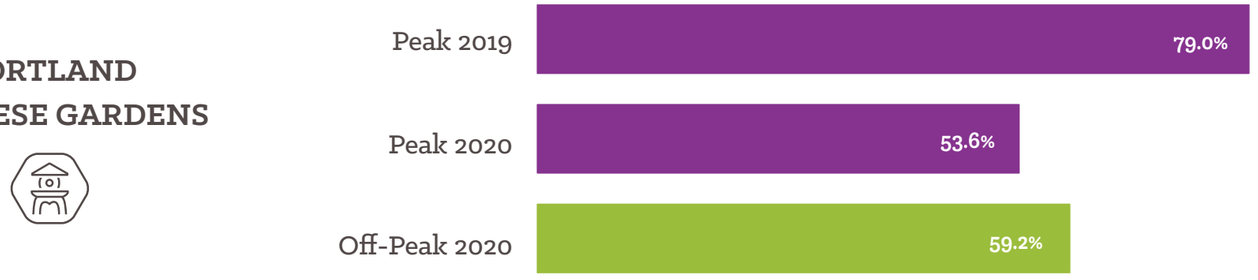
- Visitors visiting multiple venues decreased by nearly 20% when comparing the peak seasons.

VISITED MULTIPLE VENUES

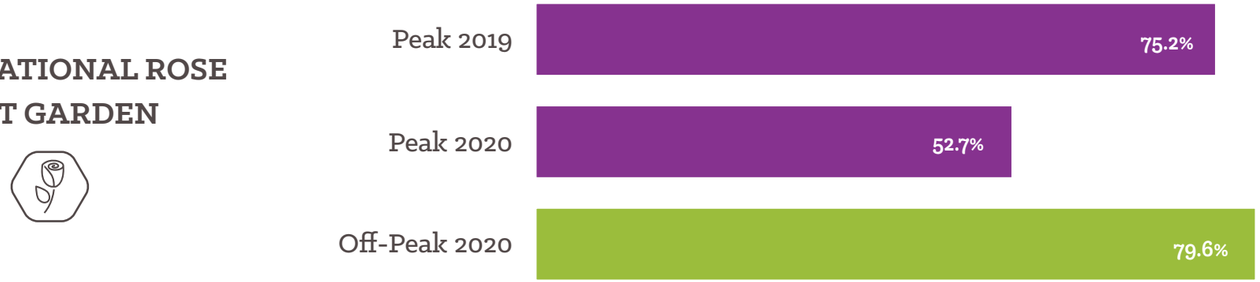
OREGON ZOO



PORTLAND JAPANESE GARDENS

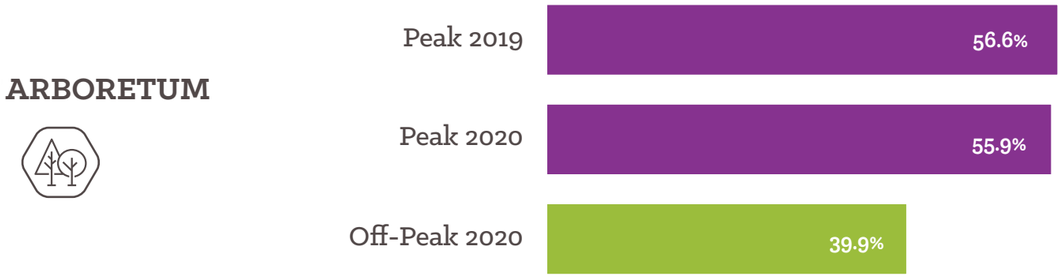


INTERNATIONAL ROSE TEST GARDEN

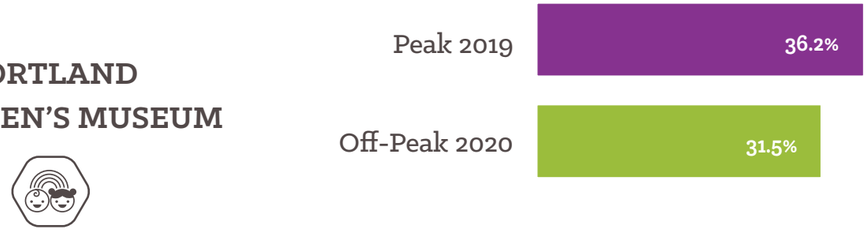


VISITED MULTIPLE VENUES

HOYT ARBORETUM



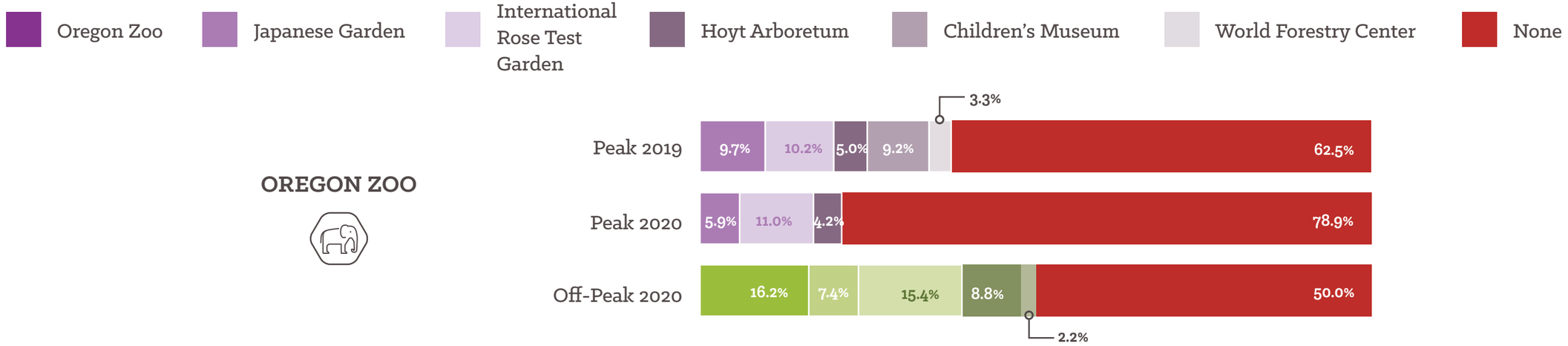
PORTLAND CHILDREN'S MUSEUM



WORLD FORESTRY CENTER DISCOVERY MUSEUM

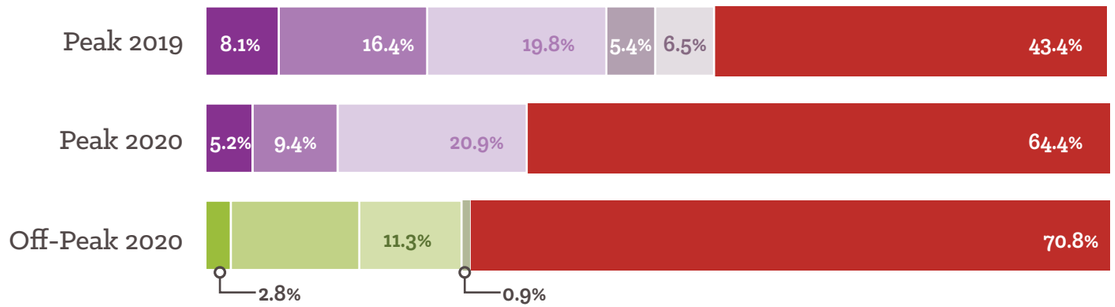
VISITOR DESTINATIONS

CROSS VENUE ATTENDANCE



CROSS VENUE ATTENDANCE

HOYT ARBORETUM



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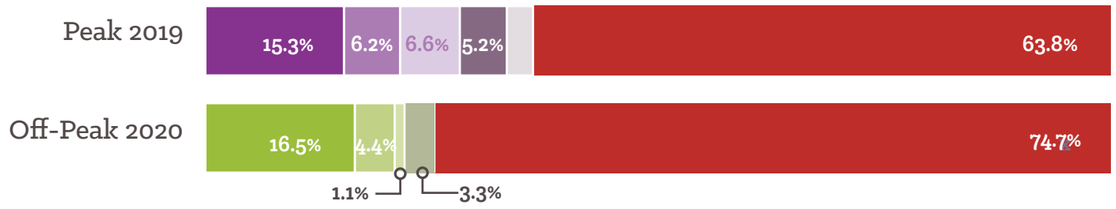

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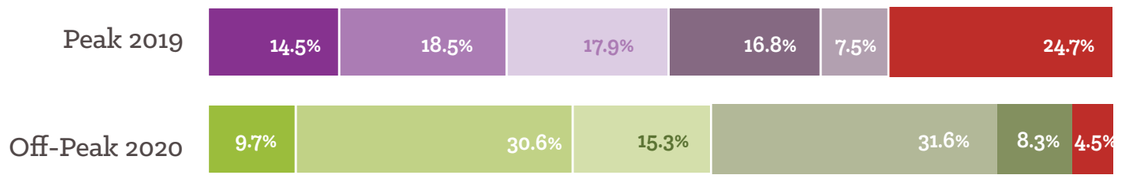
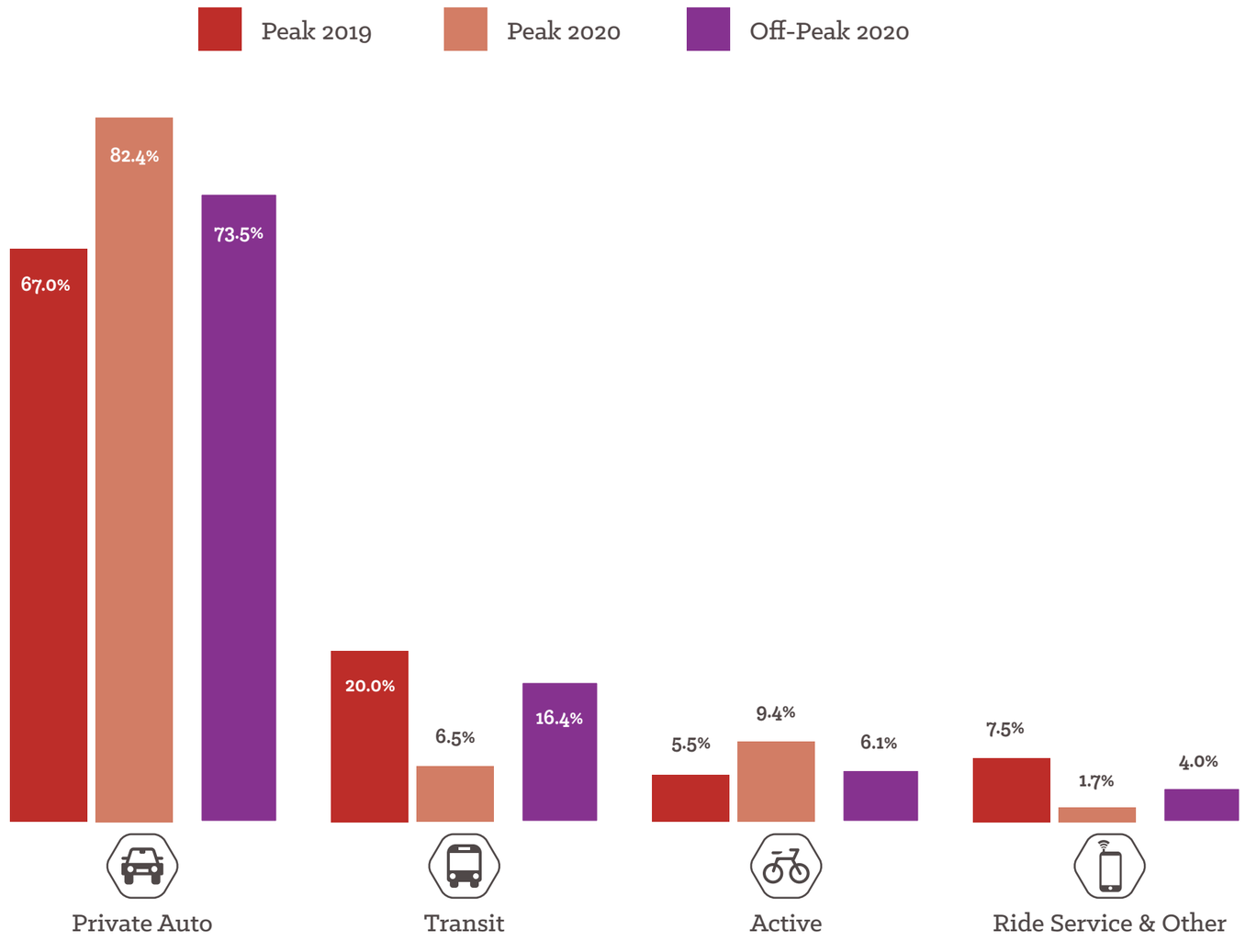


MODES

How did they get here?

- If automobile use is 81% when attendance returns to 2019 levels in the months of June–August, we can expect the south-end parking lots to be full 79 of the 91 days compared to the 52 recorded in 2019.

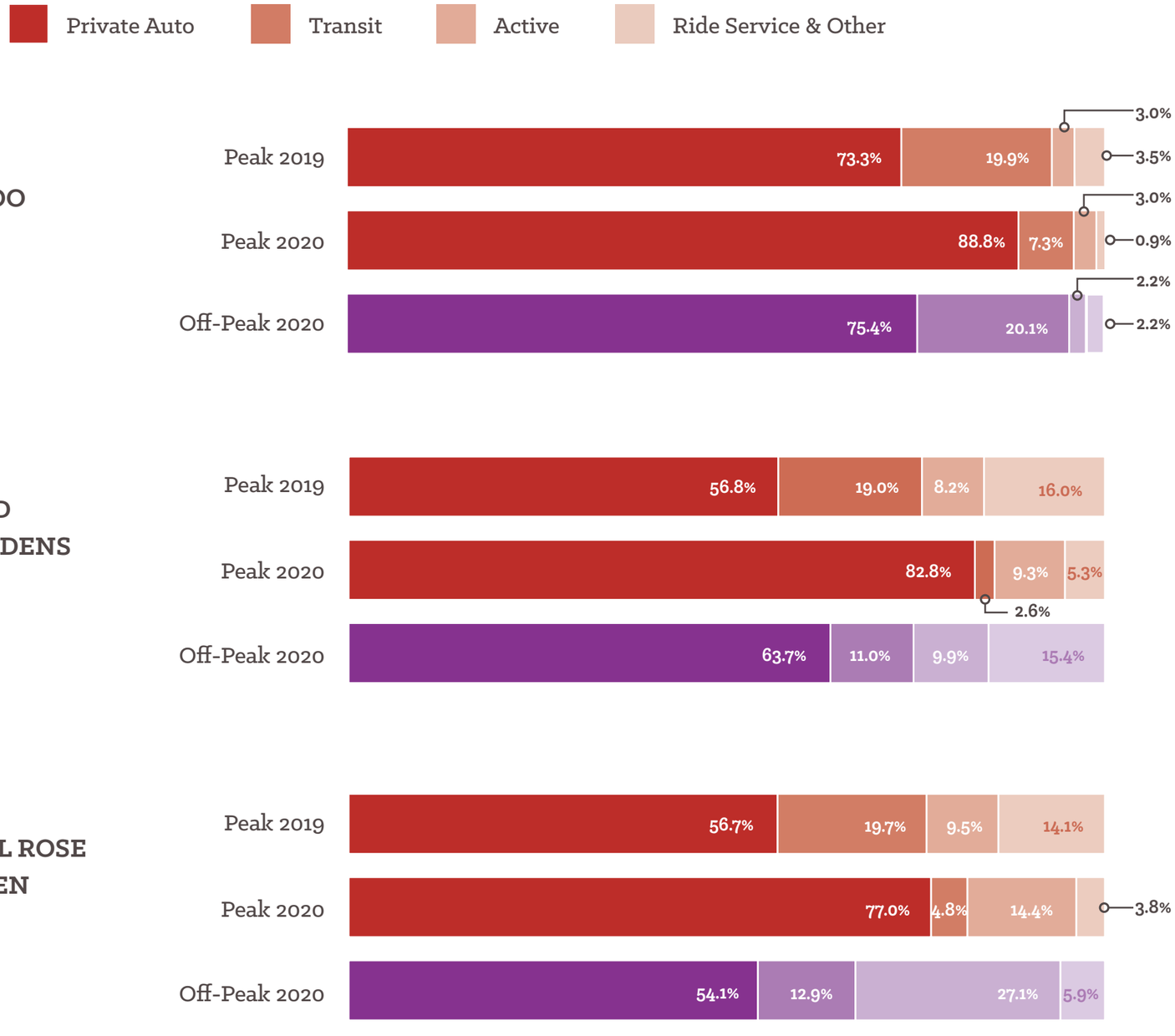
PARKWIDE MODE SPLIT



MODES

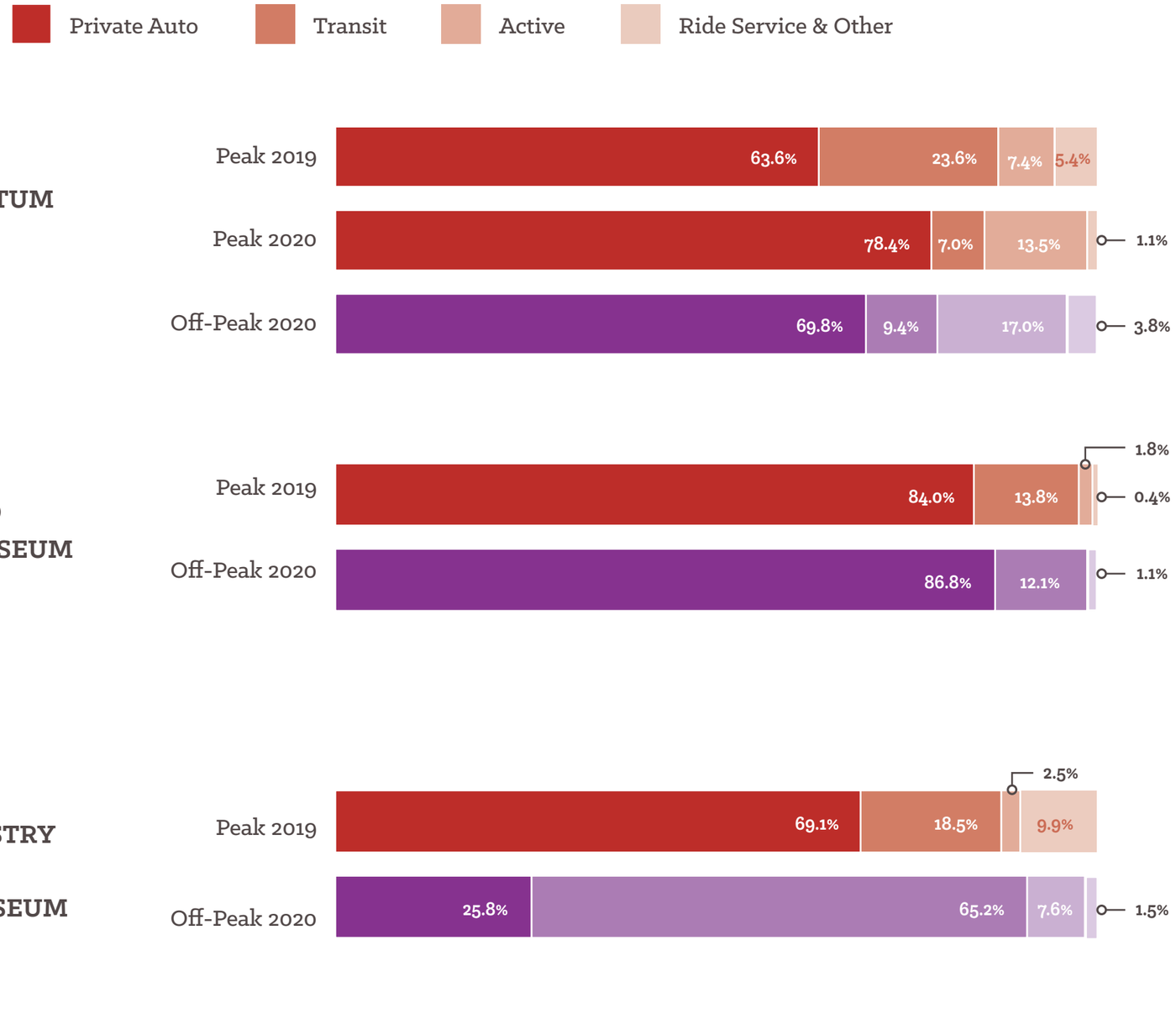
PARK VISITOR MODE SPLITS

MODE SPLIT BY INSTITUTION



PARK VISITOR MODE SPLITS

MODE SPLIT BY INSTITUTION



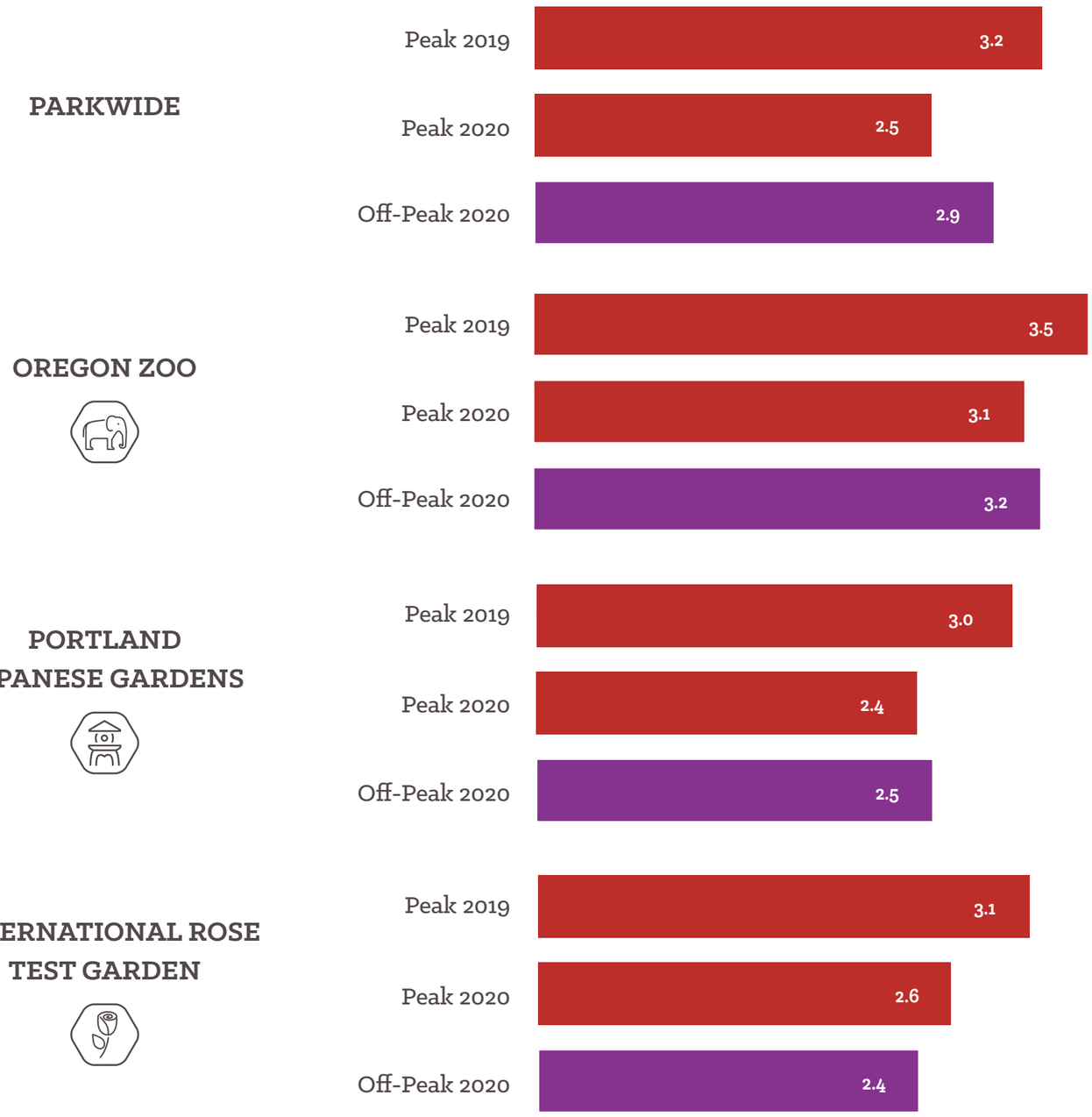
MODES

MODES

MODE SPLIT DETAILS

- A .7% reduction in passengers per vehicle equates to an additional 900 cars in Washington Park per day.

PASSENGERS PER PRIVATE VEHICLE



PASSENGERS PER PRIVATE VEHICLE

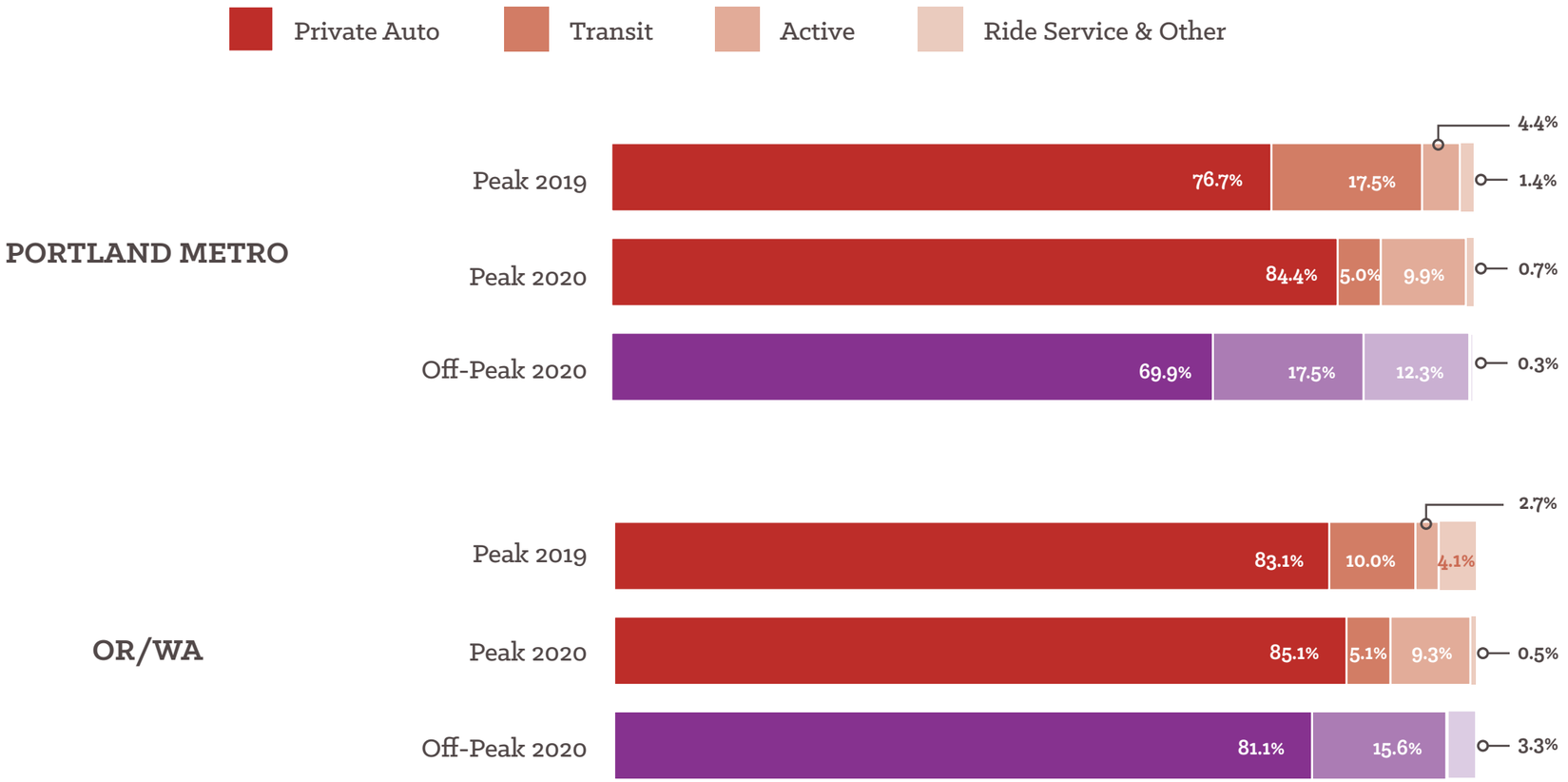
HOYT ARBORETUM

PORTLAND CHILDREN'S MUSEUM

WORLD FORESTRY CENTER DISCOVERY MUSEUM

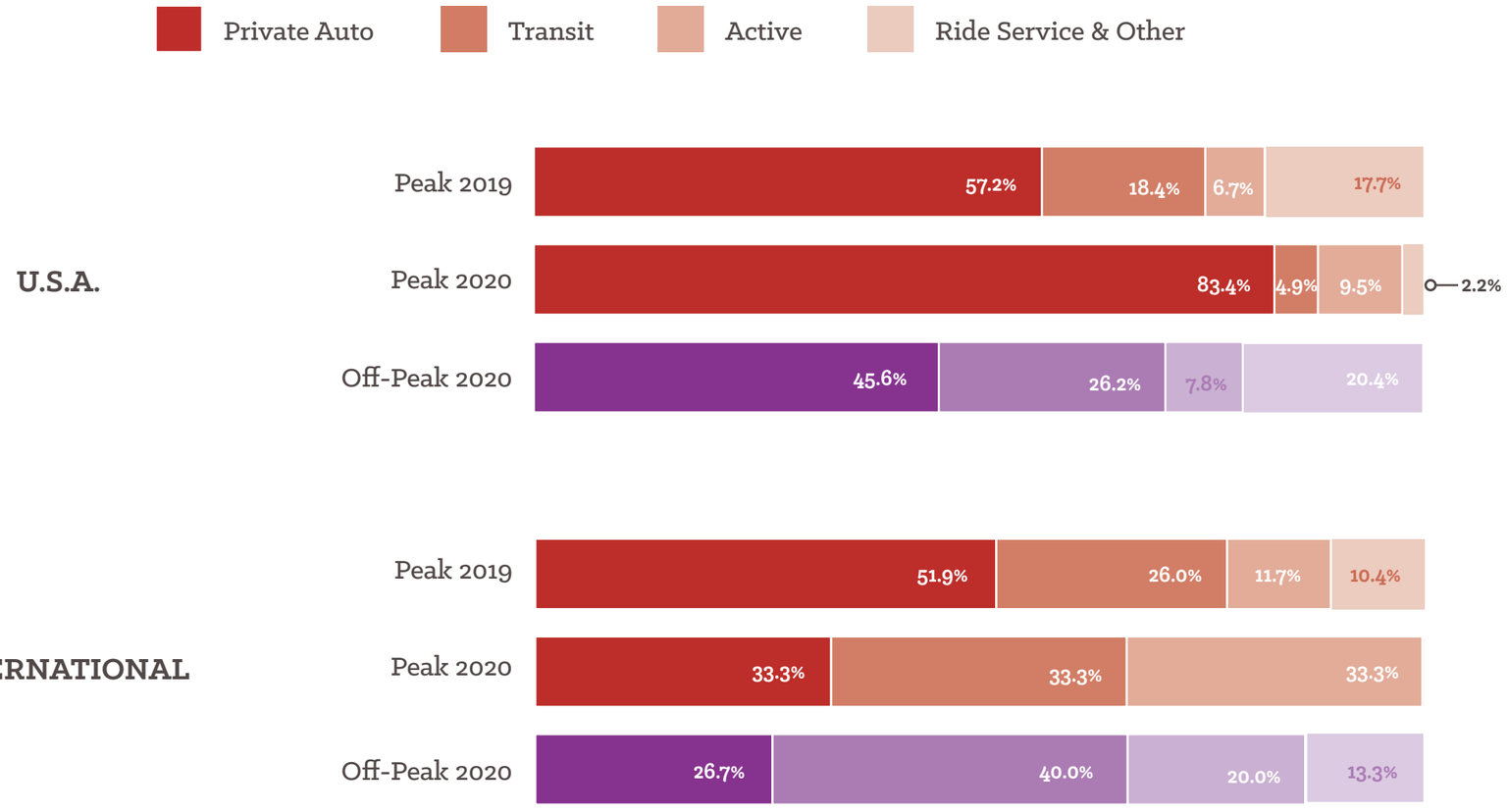
MODE SPLIT DETAILS

MODE SPLIT BY ORIGIN



MODE SPLIT DETAILS

MODE SPLIT BY ORIGIN

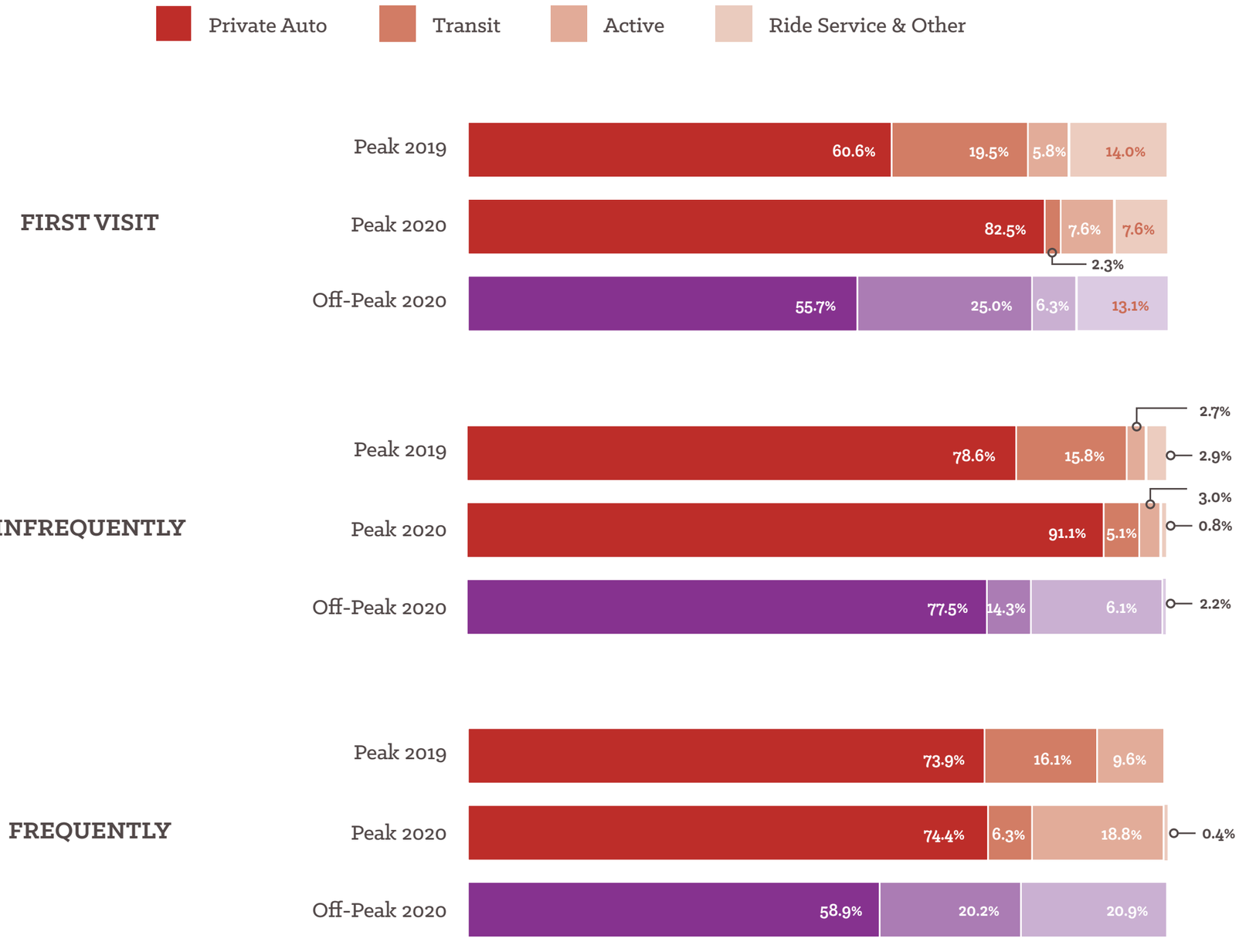


MODES

MODES

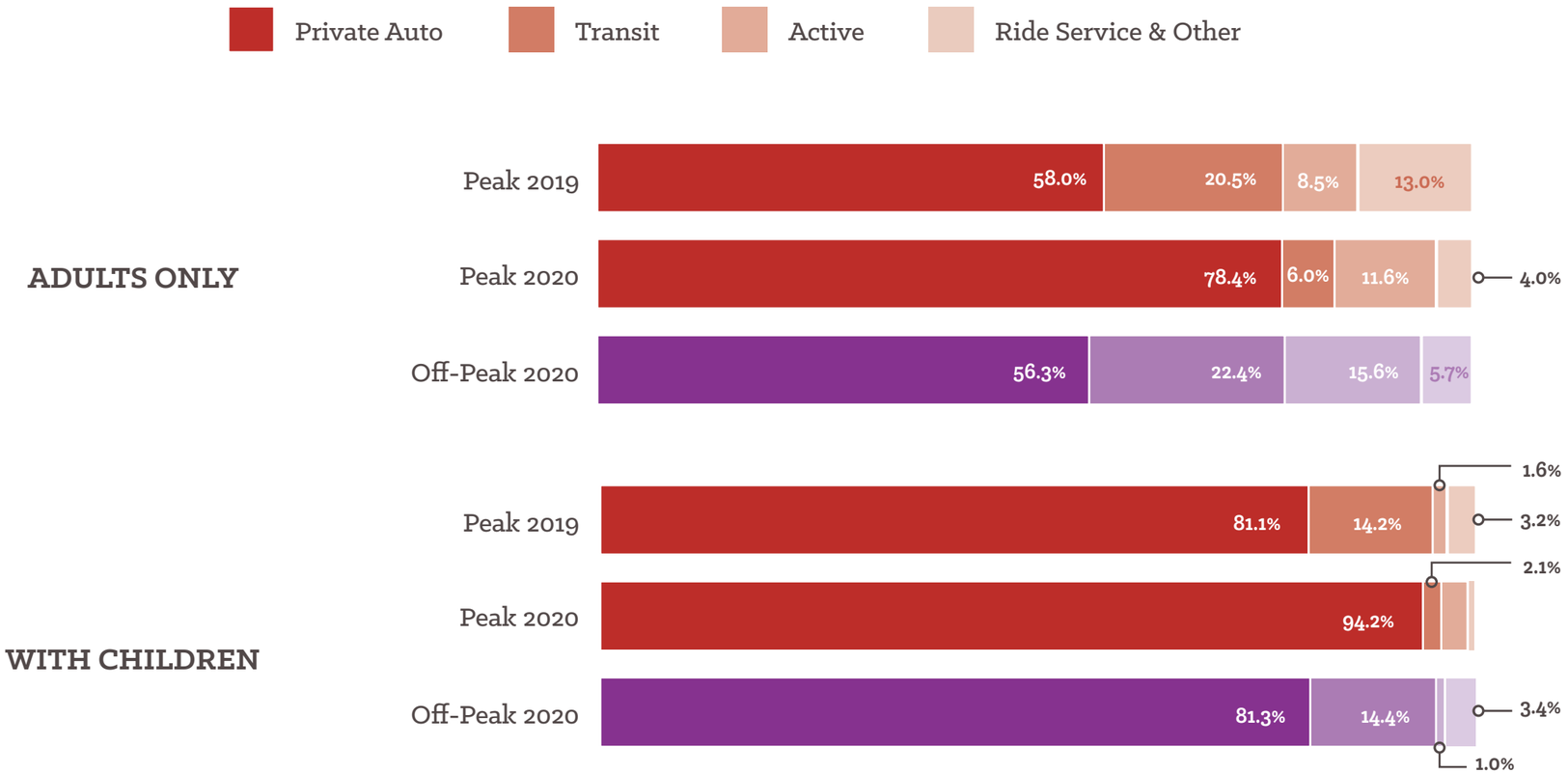
MODE SPLIT DETAILS

MODE SPLIT ON FREQUENCY OF VISIT



MODE SPLIT DETAILS

MODE SPLIT BY GROUP TYPE



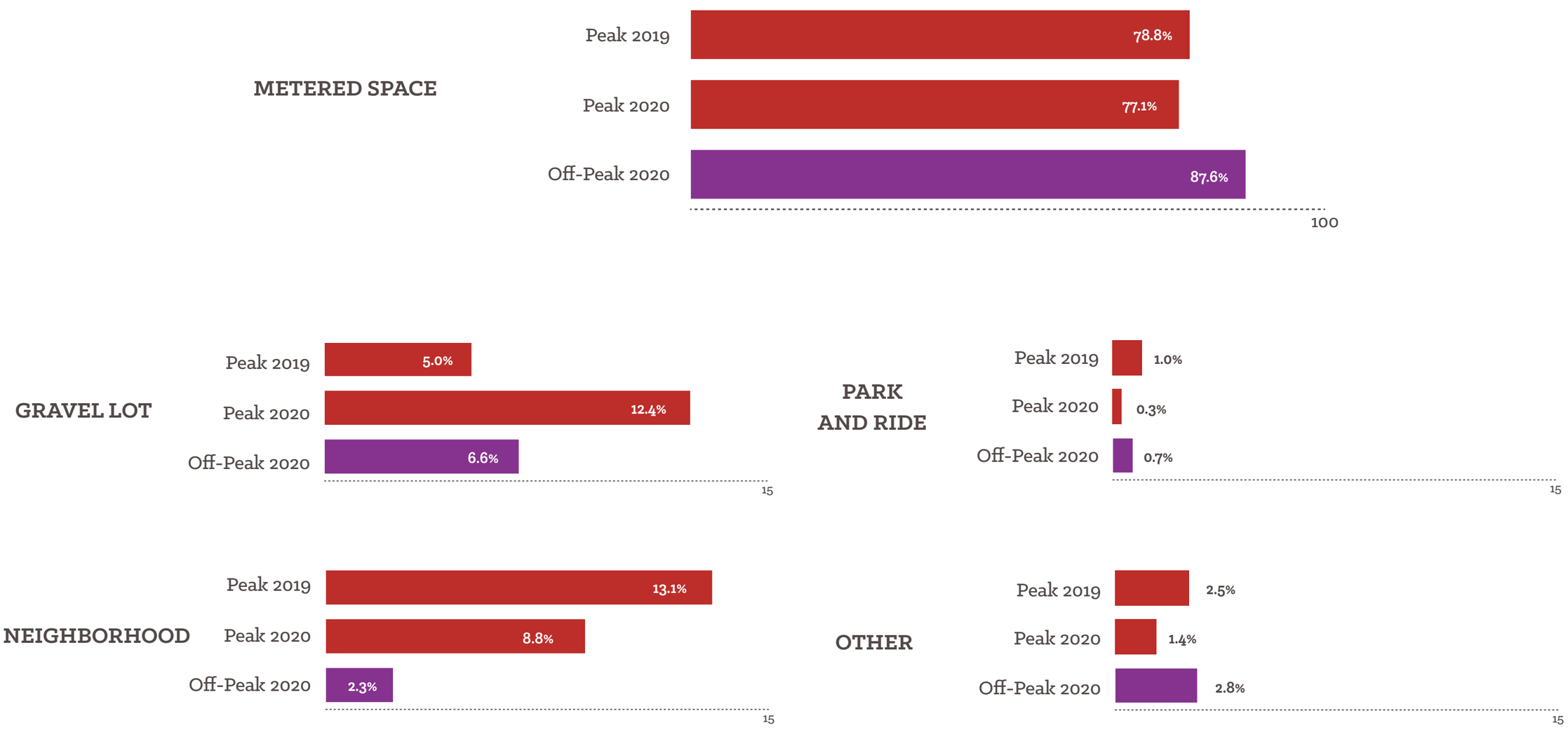
MODES

MODES

MODE SPLIT DETAILS

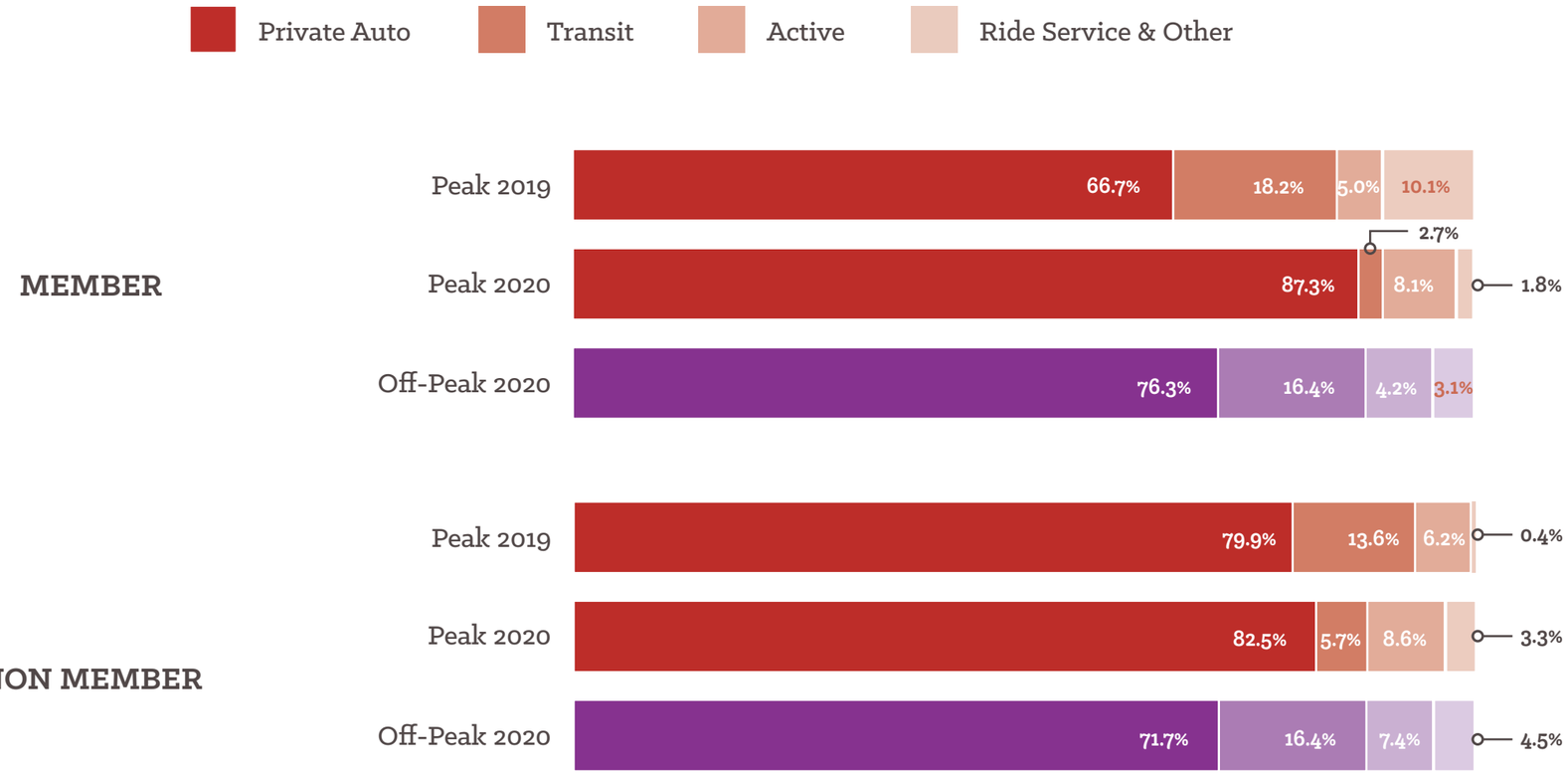
- Approximately 25% of all visitors were regular visitors to Hoyt Arboretum. This caused the increase of visitors parking in the gravel lots.
- With less congestion in the parking lots, there was a significant reduction in neighborhood streets being used.

PARKING LOCATION



MODE SPLIT DETAILS

MODE SPLIT BY MEMBER STATUS

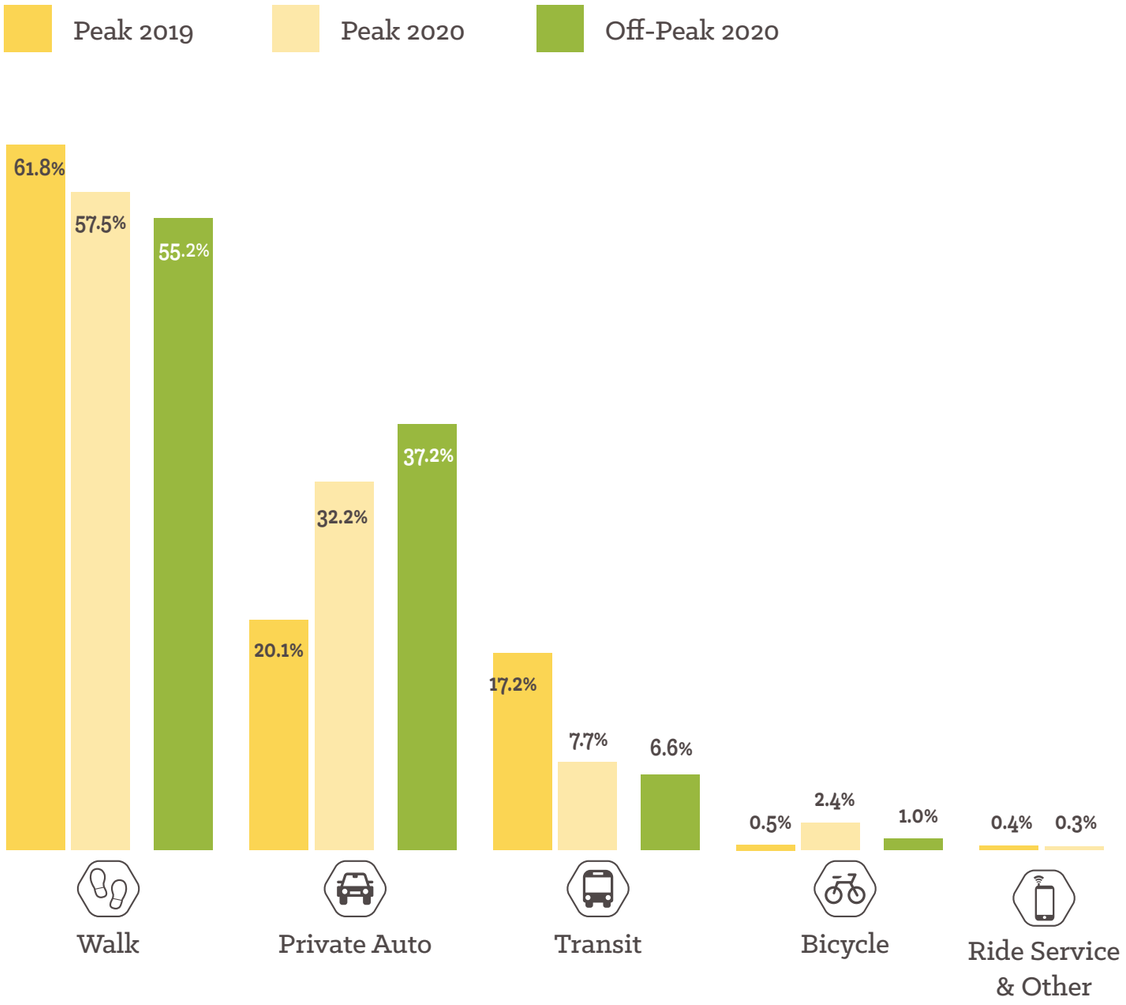


MODES

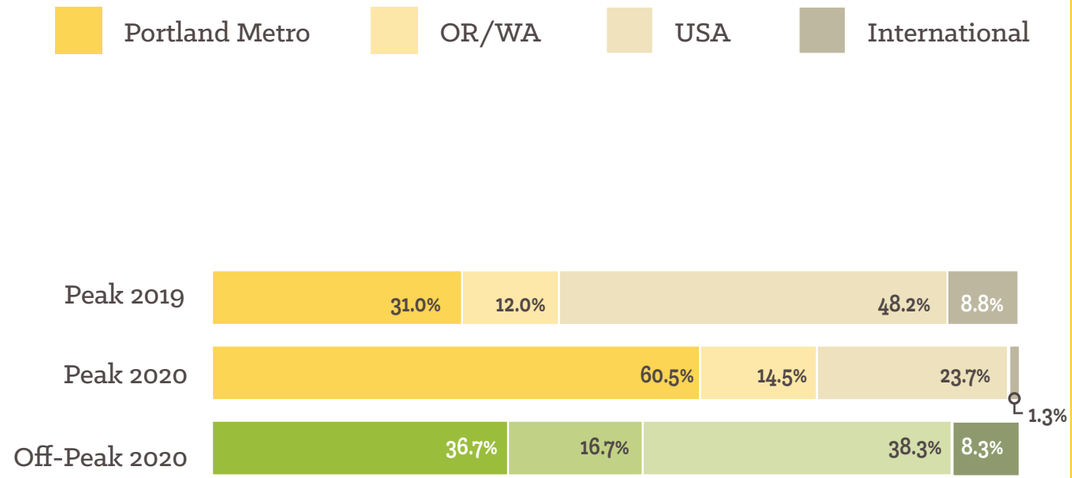
MOVEMENT

How did they get around the Park?

MODE SPLIT WITHIN THE PARK



WHERE FREE SHUTTLE RIDERS CAME FROM

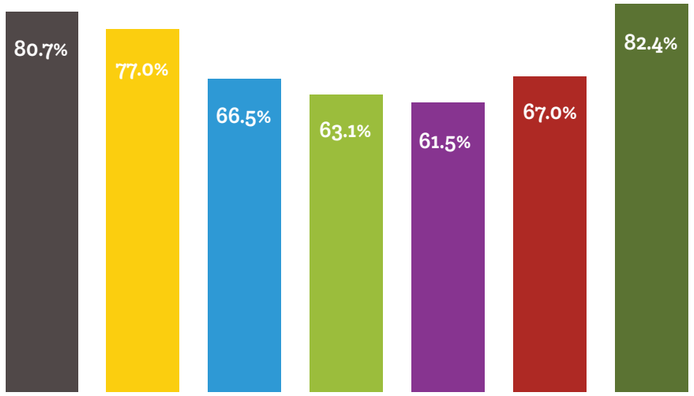


TRENDS

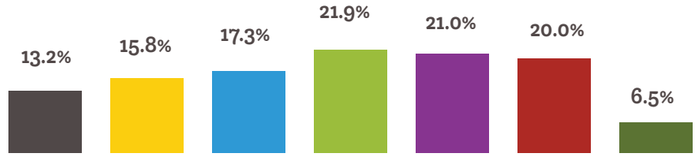
How are things changing?

MODE SPLIT TO THE PARK 2014–2020

Private Auto



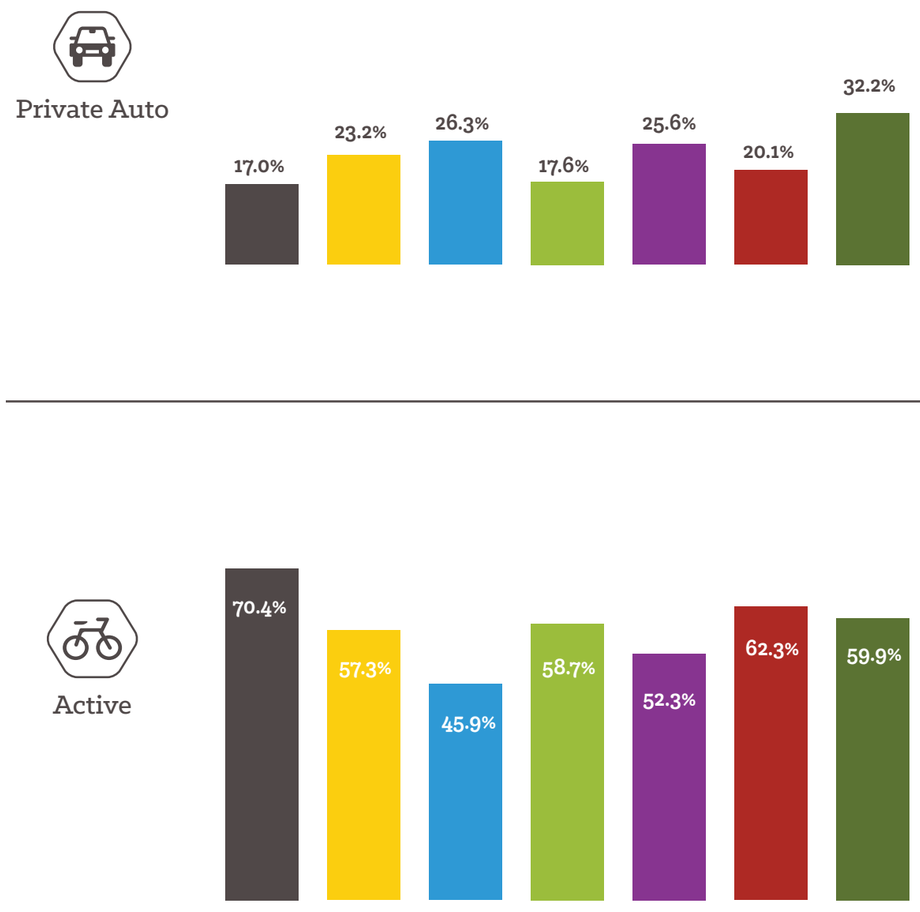
Transit

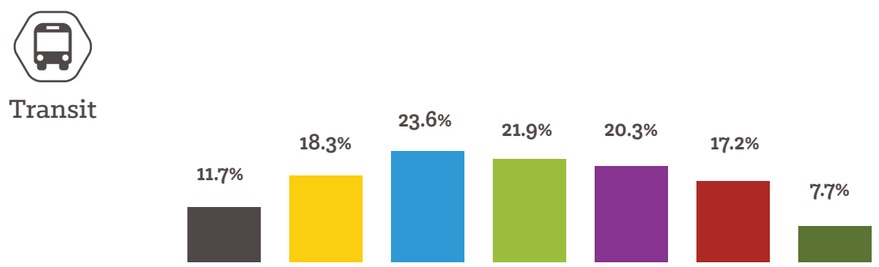


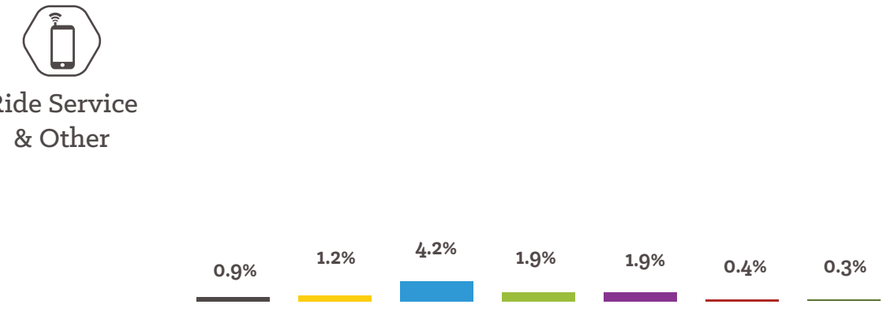
Active

Ride Service & Other

MODE SPLIT WITHIN THE PARK 2014–2020



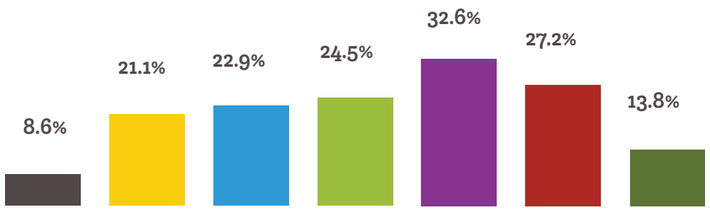




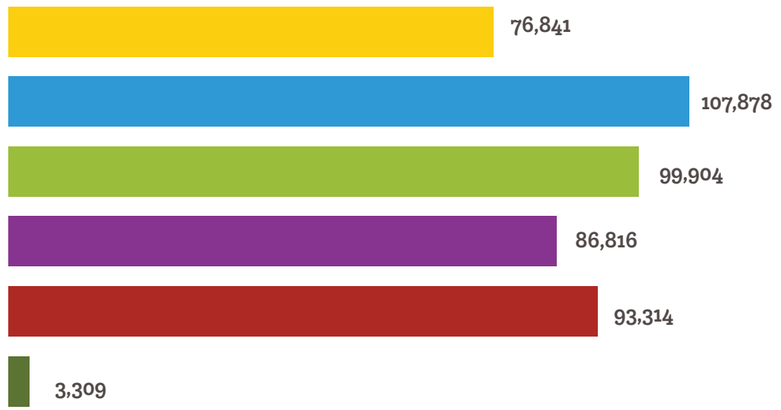
INTRA-PARK TRENDS

2014 2015 2016 2017 2018 2019 2020

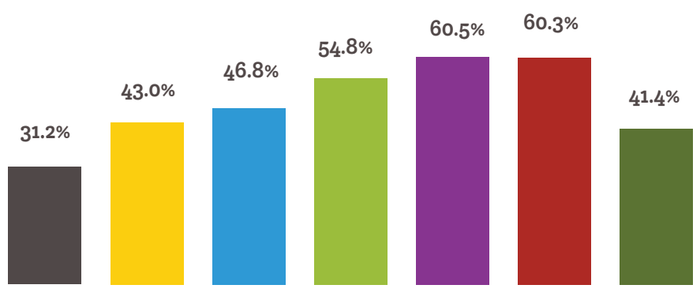
PARK VISITORS USING FREE SHUTTLE



PEAK SEASON FREE SHUTTLE BOARDINGS 2015–2020



PARK GUESTS VISITING MORE THAN ONE INSTITUTION 2014–2020

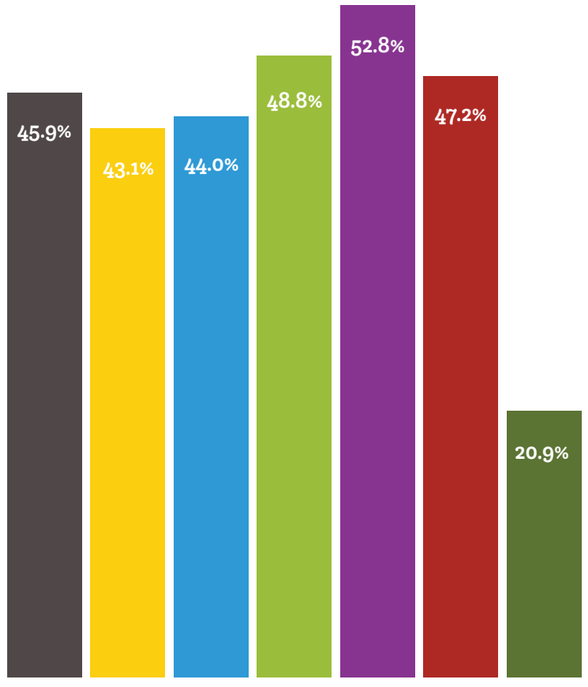


TRENDS

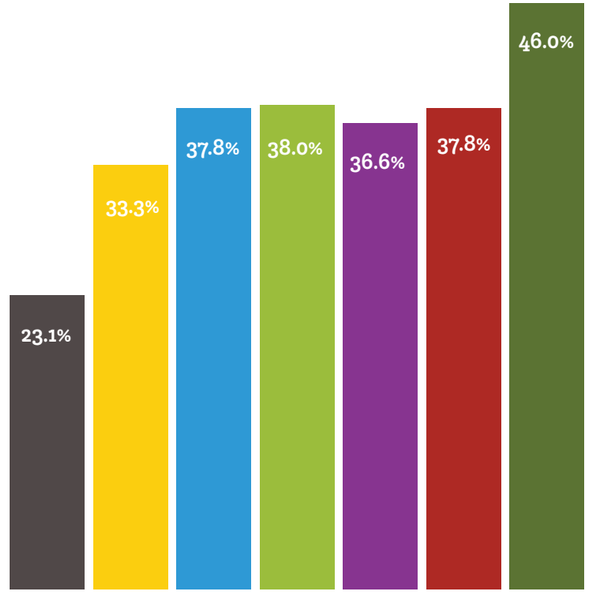
TRENDS

INTRA-PARK TRENDS

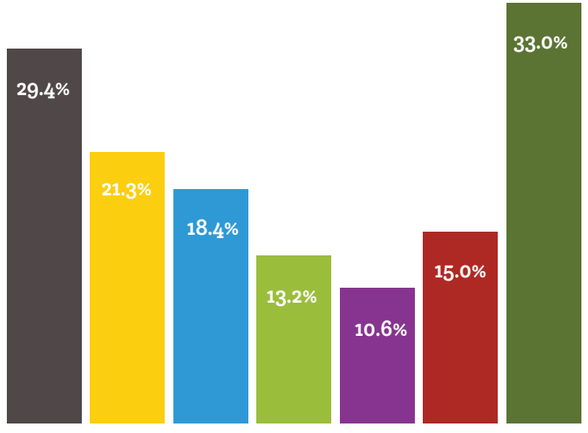
FREQUENCY OF VISITS 2014-2020



First Time



Infrequent

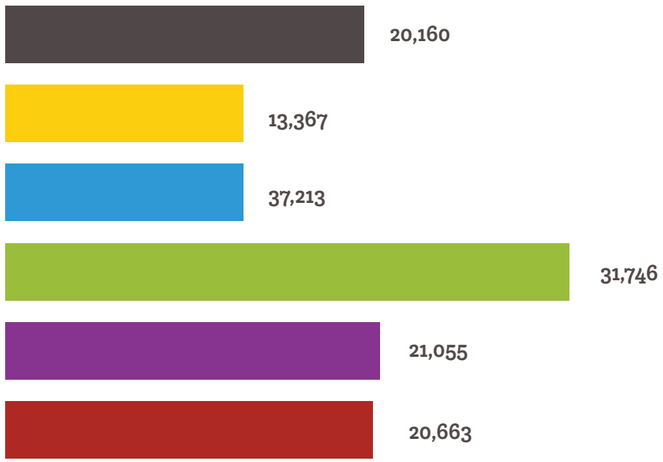


Frequent

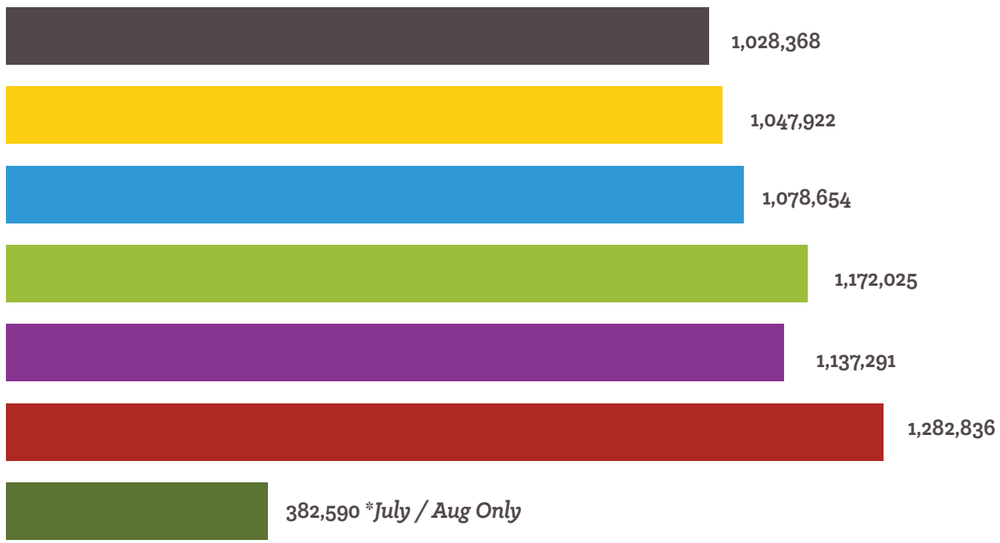
INTRA-PARK TRENDS

2014 2015 2016 2017 2018 2019 2020

OFF-SITE BUS RIDERSHIP PEAK SEASON 2014-2020



TOTAL PEAK SEASON ATTENDANCE 2014-2020



TRENDS

VISITOR EXPERIENCE & ATTITUDES

How are we serving our guests?

VISITOR EXPERIENCE PEAK 2020

TRAVEL EXPERIENCE BASED ON TRANSPORTATION METHOD

AUTOMOBILE TRAVEL EXPERIENCE BASED ON PARKING LOCATION

AVERAGE SHUTTLE RIDER RATING

4.96

NET PROMOTOR SCORE

84.8%

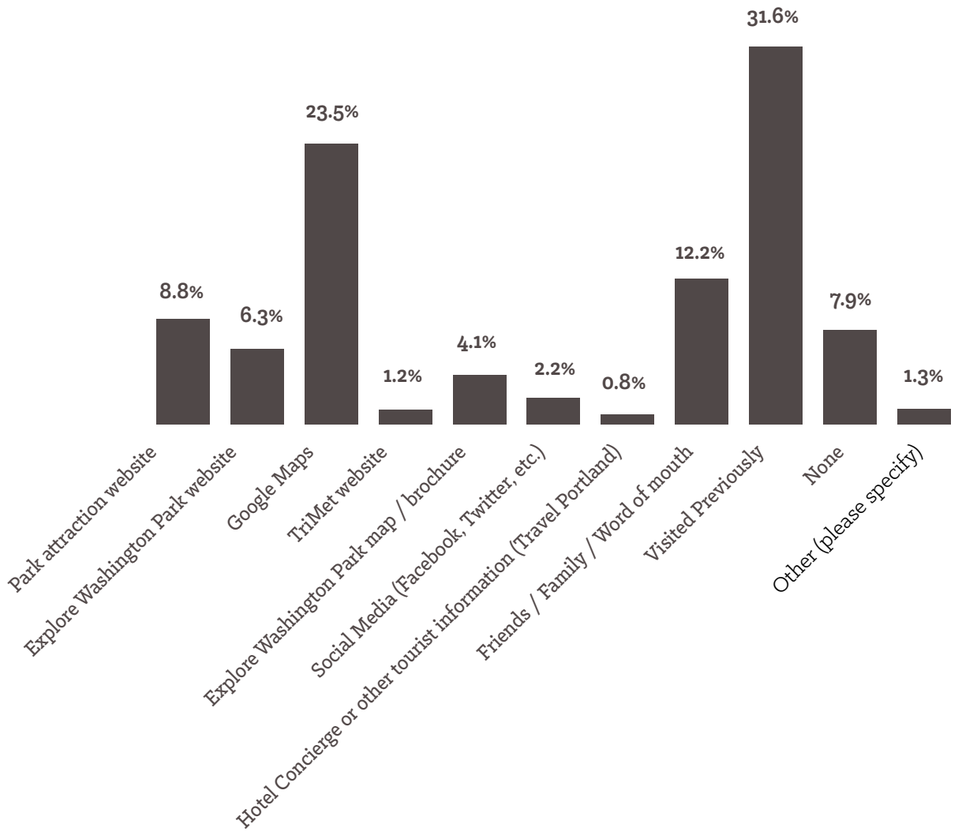
- With the park having fewer visitors, we saw record satisfaction numbers.

VISITOR EXPERIENCE & ATTITUDES

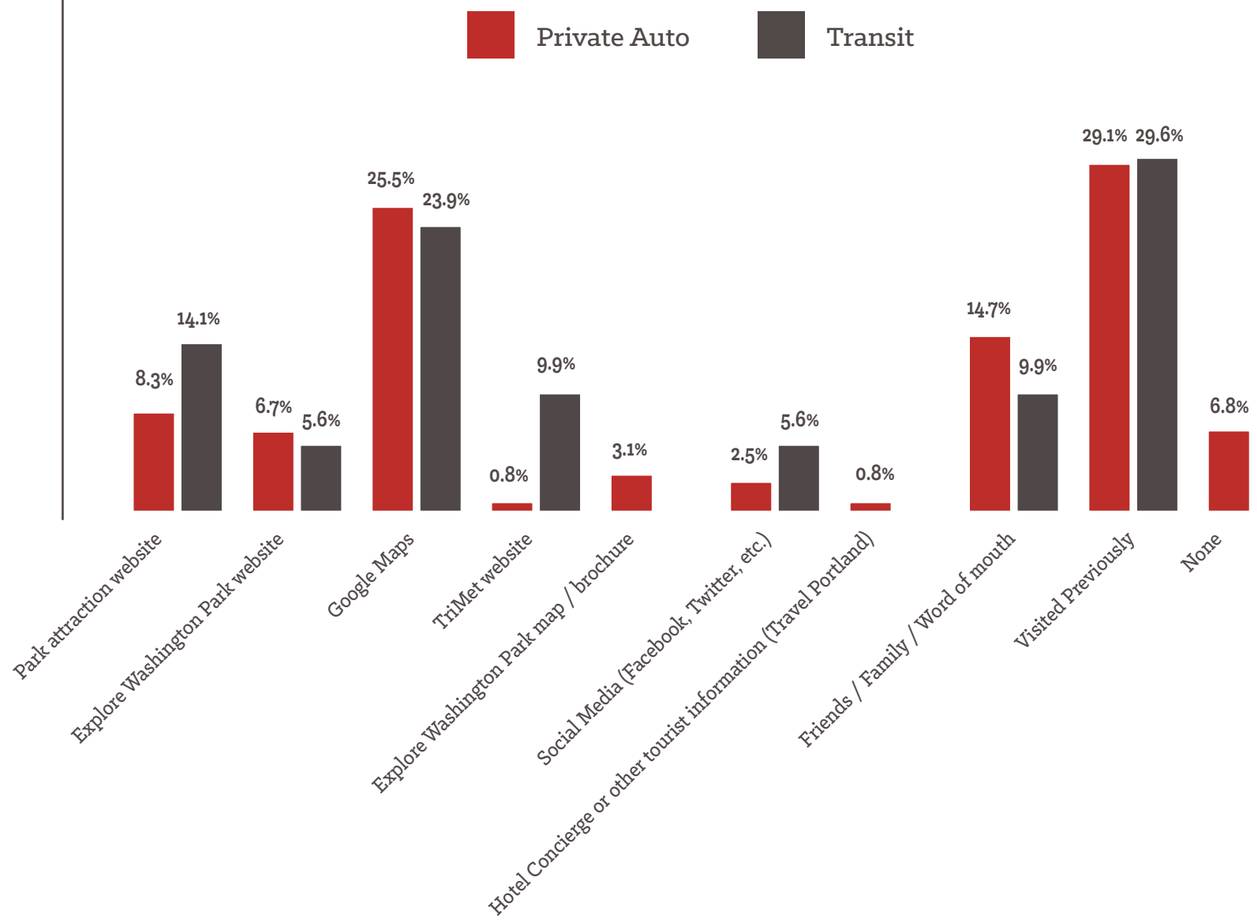
VISITOR EXPERIENCE PEAK 2020

VISITOR EXPERIENCE & ATTITUDES

PRE-TRIP INFORMATION SOURCE



MODE-SPLIT TO PARK AND EXPOSURE TO PRE-TRIP INFORMATION



- The other category included alltrails.com and tripadvisor.com.

VISITOR EXPERIENCE OFF-PEAK 2020

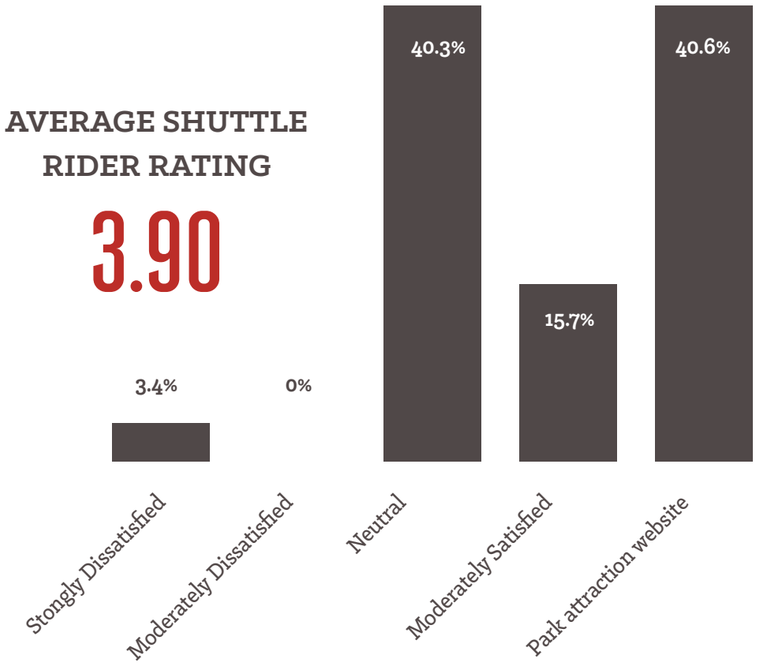
TRAVEL EXPERIENCE BASED ON TRANSPORTATION METHOD

- The Washington Park Free Shuttle dropped to under 4 stars in service satisfaction. We believe there are two main reasons:
    - Free Shuttle only ran half of the days the survey was being conducted. (Saturday, but not Friday)
    - Free Shuttle ran every half hour vs quarter hour due to anticipated ridership
- The Net Promoter Score is slightly lower than Peak 2019. This could be impacted by weather, seasonal changes in the Park being less popular (lack of roses), or change in who is visiting.

FREE SHUTTLE RIDER RATING

AVERAGE SHUTTLE RIDER RATING

3.90



NET PROMOTOR SCORE

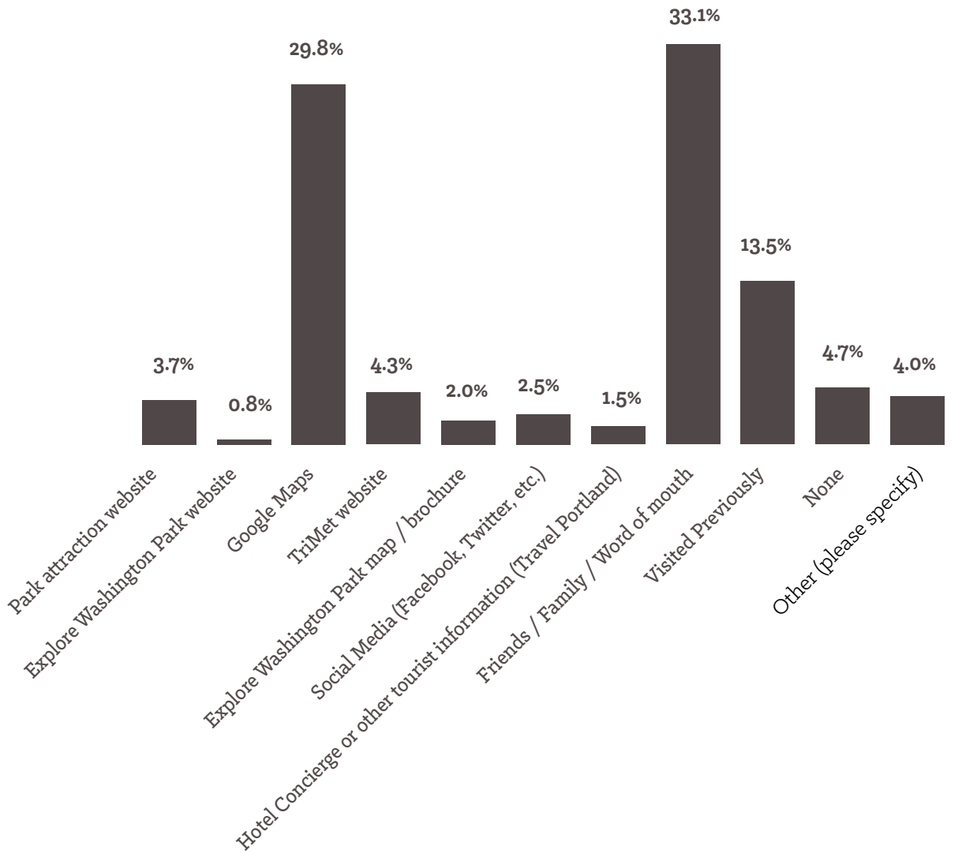
76.6%

VISITOR EXPERIENCE & ATTITUDES

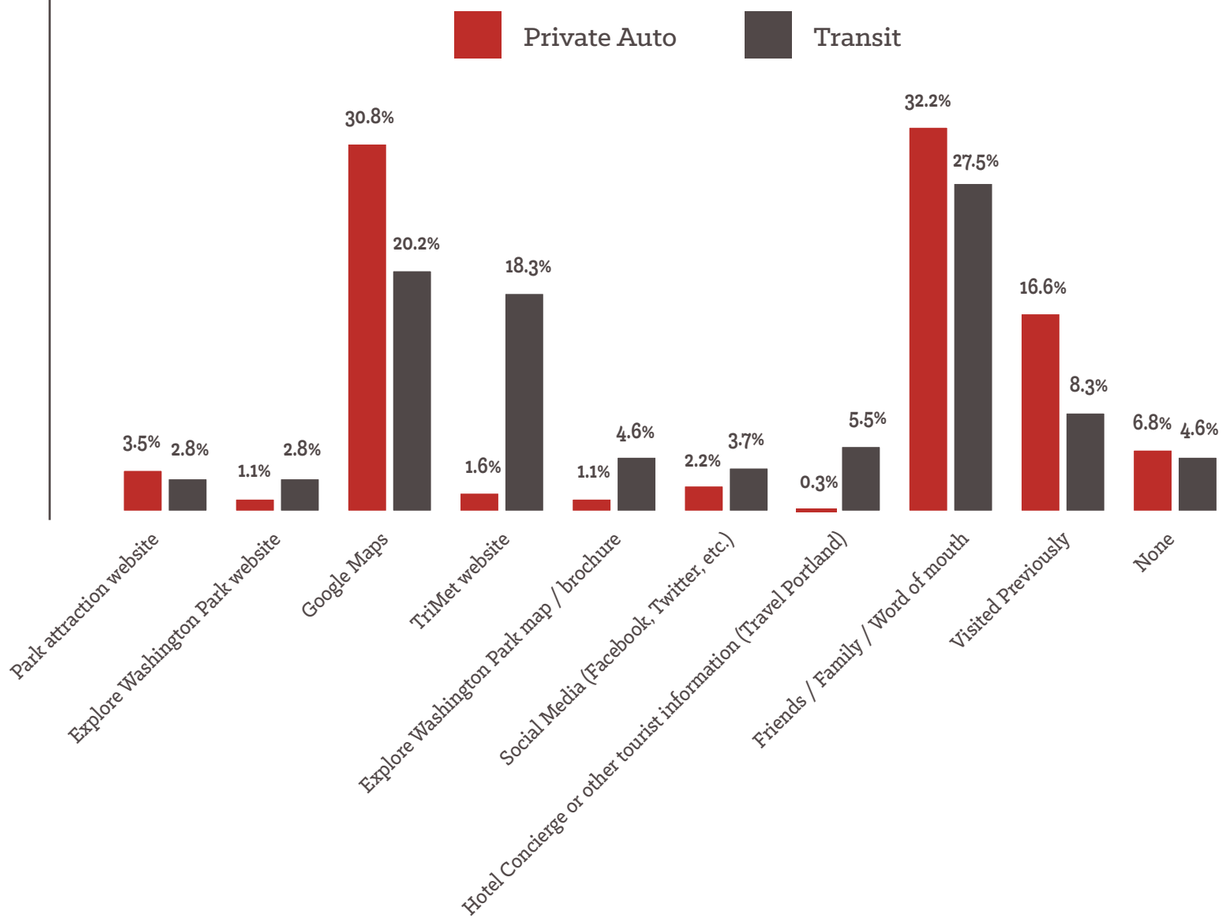
VISITOR EXPERIENCE OFF-PEAK 2020

VISITOR EXPERIENCE & ATTITUDES

PRE-TRIP INFORMATION SOURCE



MODE-SPLIT TO PARK AND EXPOSURE TO PRE-TRIP INFORMATION



Annual Transportation Report 2020

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