

Mt. Hood Area Visitor Survey Final Results

October 2018

Prepared for:

TRAVEL  **OREGON**

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INTRODUCTION / METHODOLOGY

This report presents the final results of a visitor survey conducted for Travel Oregon and Mt. Hood Territory by RRC Associates between March and June, 2018. A total of 995 visitor intercept survey were conducted at a variety of locations throughout the Mt. Hood region. Survey results generated from the 2018 sample of respondents interviewed have a margin of error of approximately +/- 3.1 percentage points calculated for questions at 50 percent response¹.

Roughly 18 different survey locations were grouped into four major locations for analysis: Estacada, Sandy, Ski Resorts, and Other Highway 26 Locations (see table below). Consideration was given to representing a wide distribution of locations throughout the region, as well as the optimal locations for intercepting visitors.

Table 1

<i>Survey Location</i>	<i>Grouped As:</i>
<i>Downtown Estacada</i>	Estacada
<i>Metzler Park</i>	
<i>Milo Mclver State Park</i>	
<i>Upper Clackamas Whitewater Festival</i>	
<i>Downtown Sandy</i>	Sandy
<i>Jonsrud Viewpoint</i>	
<i>Sandy Ridge Trailhead</i>	
<i>Mt. Hood Meadows</i>	Ski Resort
<i>Mt. Hood Meadows Park & Ride</i>	
<i>Mt. Hood Skibowl</i>	
<i>Timberline Ski Area</i>	
<i>Timberline Resort Shuttle</i>	
<i>Camp Creek Campground</i>	Other Highway 26 Location
<i>Government Camp</i>	
<i>Mirror Lake Trailhead</i>	
<i>Mt. Hood Express</i>	
<i>Trillium Lake Trailhead</i>	
<i>Zigzag Mountain Trailhead</i>	

Results were also grouped into two seasons (Late Winter and Spring) for analysis; weather data were analyzed to determine the seasonal breakout (Late Winter: April 23 and earlier / Spring: April 24 and later).

¹ For the total sample size of 995 respondents interviewed during Late Winter/Spring 2018, margin of error is +/- 3.1 percent calculated for questions at 50% response (if the response for a particular question is “50%”—the standard way to generalize margin of error is to state the larger margin, which occurs for responses at 50%). Note that the margin of error is different for every single question response on the survey depending on the resultant sample sizes, proportion of responses, and number of answer categories for each question. Comparison of differences in the data between various market segments and from year to year, therefore, should take into consideration these factors. As a general comment, it is sometimes more appropriate to focus attention on the general trends and patterns in the data rather than on the individual percentages.

This report will be primarily focused on transportation in the region, with specific recommendations made regarding increasing public transportation usage in the area. The intercept survey probed familiarity with public transit options in the area, method of travel to the Mt. Hood area, obstacles to taking public transportation, factors that would increase utilization of public transportation, and typical usage of public transit and rideshare. However, results from other questions on the survey, such as visitor demographics and activity participation while in the region, are also summarized in this report, as these results aid in the interpretation of transportation-related data.

We direct the reader to a copy of the survey form, included in the Appendix A section of the report, as a reference to all questions addressed in the intercept survey. Open-ended comments from the survey, including visitor suggestions for improving travel to the Mt. Hood area, are included in the Appendix B section. Tables showing detailed survey results for the visitor intercept survey are provided in Appendix C.

KEY FINDINGS AND RECOMMENDATIONS

- Personal vehicles are, by far, the most used transportation method in the region.** Eighty-three percent of respondents traveled by private car, an additional 8 percent by camper/RV, and 5 percent by rental car. Only 4 percent of all respondents used the bus, although the frequency of bus usages was higher among visitors to ski resorts (7 percent) and other Highway 26 locations (13 percent). Bus usage was also higher in late winter (5 percent) than in spring (1 percent).
- Improve communications about public transportation offerings.** Respondents were more likely to be “not at all” familiar with each of the four public transit options in the area than they were “somewhat” or “very” familiar. Familiarity with Trimet and Mt. Hood Express was higher than for Sandy Area Metro or Columbia Gorge Express, but for all four options more than half of all respondents indicated they were “not at all” familiar (56 percent for Trimet to 85 percent for Columbia Gorge Express). Additionally, one in five respondents said they would be more encouraged to take public transportation in the future if they knew more about the offerings.

Familiarity was higher for Trimet, Mt. Hood Express, and Sandy Area Metro in late winter, signaling an increased attention to alternative transportation methods during periods of inclement weather. However, familiarity with Columbia Gorge Express was consistently low, highlighting that improved communications about that option may be warranted in particular.

- To increase public transportation usage, make the experience as seamless as driving a car.** About three in five respondents who didn’t take public transportation as part of their travels to the Mt. Hood area would be encouraged to take public transportation to the area in the future if some factors were addressed (60 percent). The top factor cited was having travel time be about the same as driving a car (26 percent), followed by increasing public awareness about bus service (20 percent), fewer transfers (19 percent), increasing bus service frequency (15 percent), and offering seat reservations (11 percent).
- Focus on promoting transportation opportunities to visitor segments that are more open to taking public transportation in the future.** There is more willingness to travel by public transportation to the Mt. Hood area in the future among single respondents without kids, day visitors from a nearby area, wintertime visitors, and Oregon residents. When asked what, if anything, would most encourage you to take public transportation when traveling in this area in the future, these segments of visitors were less likely to cite “None – would not ride the bus more frequently”. Rather, they were more likely to select a variety of motivators. Top among them were having travel time be about the same as driving my car, increasing public awareness, fewer transfers, and increasing frequency of service along existing routes.

- **To increase bus usage among solo travelers, focus on optimizing bus service along Highway 26.** About 12 percent of all visitors were traveling alone. About one in five of these visitors took the bus when traveling to a ski resort or other Highway 26 location, highlighting that there is opportunity to increase bus usage among solo guests going to Highway 26 locations. Solo travelers were generally open to taking public transit in the future, and would like to see increased speed of trip, travel time be about the same, increasing frequency of service along existing routes, and having more information about what's available.
- **Improve gear storage options on public transit.** Other than just preferring to drive (cited by 57 percent of respondents), the biggest reason cited for not taking public transportation was having too much stuff (44 percent). Given that leisure/outdoor recreation is overwhelmingly the reason for visiting the area (87 percent), visitors are likely to have a lot of gear. Some of the gear-intensive activities in which visitors participate while visiting the region include downhill snowsports (41 percent), biking (14 percent), fishing (10 percent), backcountry snowsports (9 percent), and watersports (9 percent). Open-ended comments further highlighted that visitors find public transportation a challenge with so much gear (i.e., ski equipment in winter, camping equipment in spring).
- **Accommodate public transportation for pets.** Eight percent of all visitors were traveling with pets. This number was even higher among springtime respondents and those camping in the area. When asked why they didn't take public transportation on their trip, many people said they had dogs with them.
- **Try to capture out-of-state visitors who flew and rented a car by providing bus service between Portland and Government Camp, and offering stops near ski resorts, trailheads, and restaurants.** Additionally, it might be fruitful to focus marketing efforts on the scenic aspects of this transportation route. Thirteen percent of all out-of-state visitors flew to the area. Among those who flew, 58 percent rented a car. These visitors were most likely to be going to Portland and Government Camp, and were most likely to be participating in hiking/trailing running (63 percent), scenic drives (38 percent), snowsports (34 percent), and dining out (31 percent) while in the Mt. Hood area.
- **Offer "hop on, hop off" ride option with one easy, affordable ticket.** About half of all respondents visited more than one location during their trip. Government Camp, Portland, Sandy, Timberline, Hood River, the Columbia River Gorge, and Oregon Coast were the most visited locations. Providing user-friendly connections and cost savings between locations could help increase the share of respondents opting for public transit.

- **To increase economic impact to the region, attract the visitors that tend to spend more while in the area: ski resort visitors, wintertime visitors, overnight visitors, out-of-state residents, and families.** To appeal to the interests of these higher-spend visitors, focus on expanding service or at least making sure communication to these groups aligns with their values. Ski resort visitors would like to see increased frequency of service on existing routes. Households with kids were more likely to desire guaranteed seats via reservations. All visitors were most likely to want travel time be about the same as driving a car.
- **Market to current users of public transit and rideshare.** Current users of public transit and rideshare are notably more likely than non-users of being willing to use the bus more frequently in the future if certain factors were addressed. Both of these user groups would most like to see travel time be about the same as driving a car. Current public transit users were also much more likely to want to see increased frequency of bus service on existing routes.

Singles without kids are the most likely to use public transit at least once in a typical week (32 percent), while couples without kids are the most frequent users of rideshare in a typical week (28 percent). Respondents in lower income brackets use public transit more often, while those in higher income brackets use rideshare more often. Oregon residents use each transportation mode more often in a typical week than out-of-state residents (26 to 27 percent vs. 15 to 17 percent).

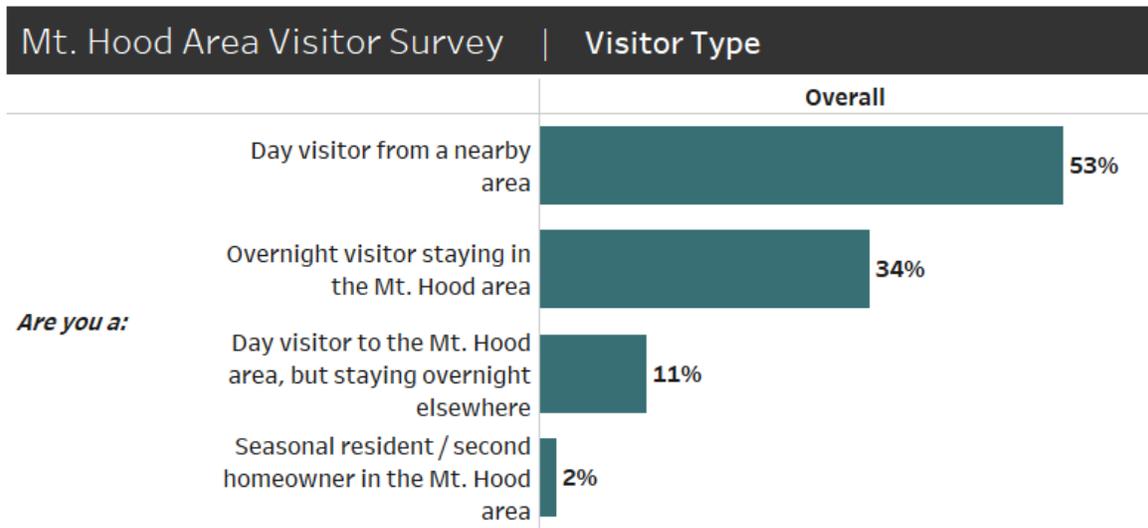
- **Improve signage for regional attractions.** A comment that came up frequently among visitors to the area was that signage could be improved. Guests noted lack of signage, difficult-to-read signage (both in terms of size and lack of lighting at night), and just a general desire for more information. Developed in conjunction with expanded bus service, improved signage could create a more user-friendly and seamless visitor experience in the region.
- **Incentivize carpooling with premium parking at trailheads and ski resorts.** A majority of visitors take their personal vehicle while traveling in the area. The top reason cited for not taking public transportation is because of a preference for driving (57 percent), a notable 40 percent would not be motivated to take public transit, and visitors travel in large parties on average (3.6). In addition to increasing public transportation, there might be opportunity to increase carpooling among those who will drive to the area regardless by offering preferred parking at high-traffic locations.

VISITOR DEMOGRAPHICS

Visitor Type

The largest segment of visitors to the Mt. Hood area were day visitors from a nearby area (53 percent). One in three respondents were overnight visitors staying overnight in the Mt. Hood area (34 percent), 11 percent were day visitors to the Mt. Hood area but staying overnight elsewhere, and 2 percent were seasonal residents/second homeowners.

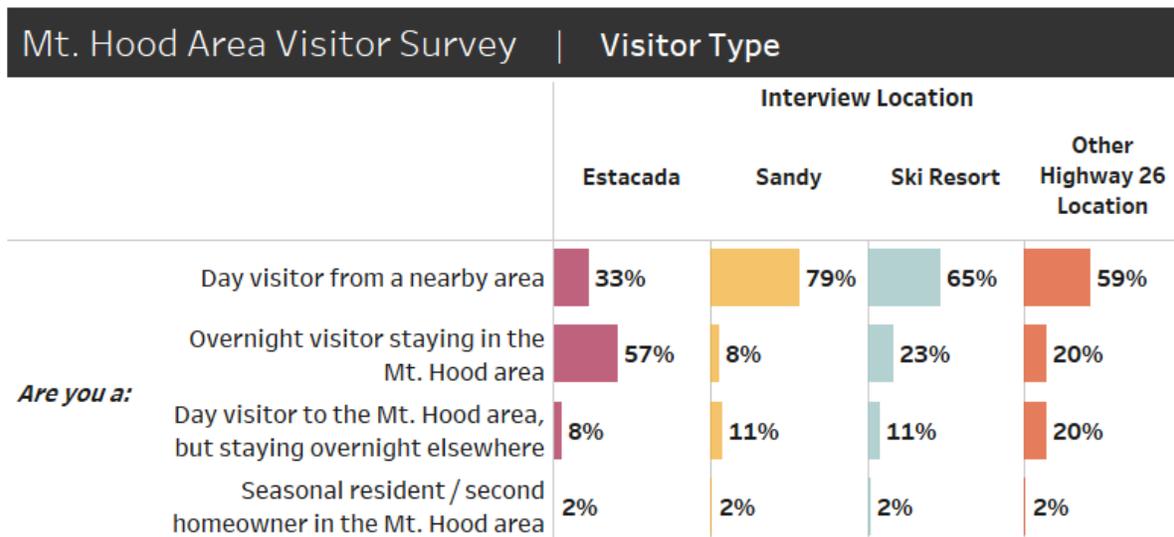
Figure 1



Source: RRC Associates

Sandy and Highway 26 locations (including the ski resorts) tended to pull more day visitors, while a greater share of overnight visitors were found in the Estacada area.

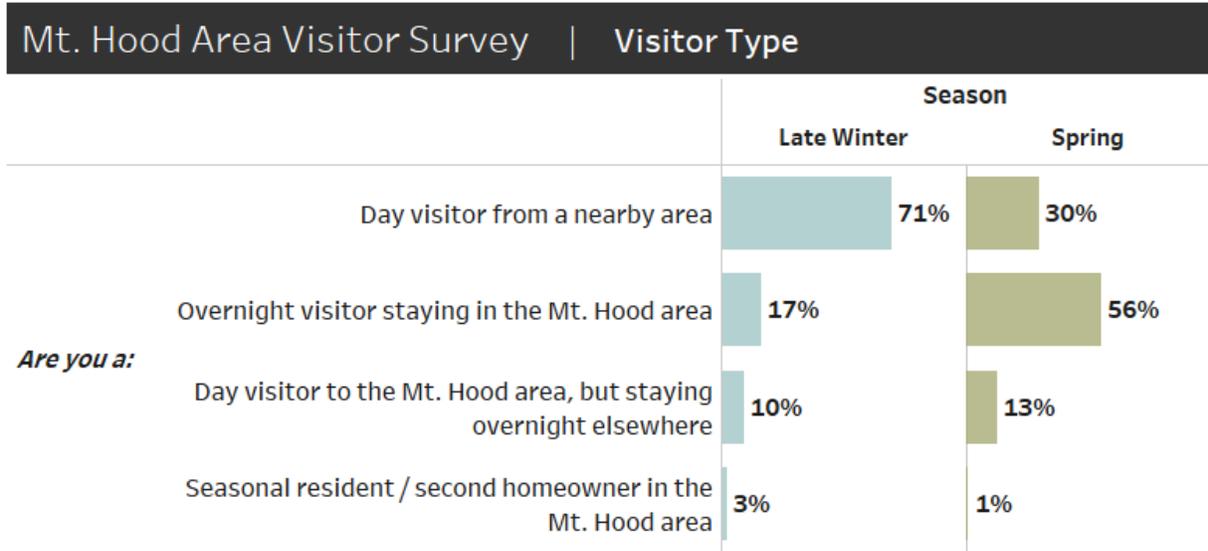
Figure 2



Source: RRC Associates

Late winter also had a larger day visitor draw (driven by a large share of surveys conducted at ski resorts in late winter), with increasing shares of overnight visitors noted into the spring.

Figure 3



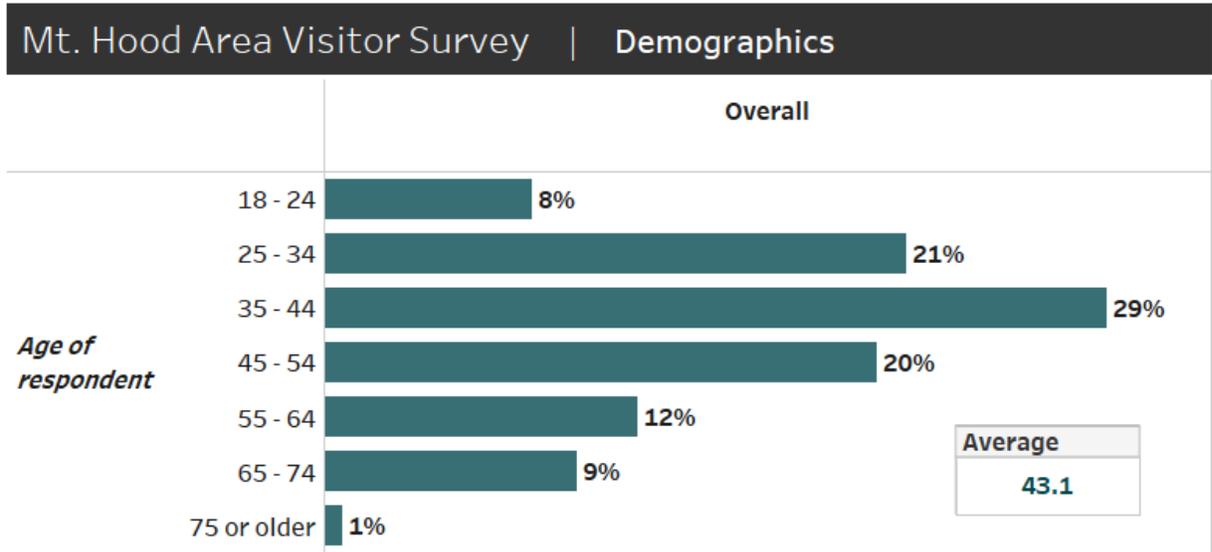
Source: RRC Associates

Respondent Profile

Specific demographic results from the visitor intercept survey include the following observations:

- Age.** The Mt. Hood area attracts visitors from a variety of age cohorts. The average visitor age is 43.1. The age profile varies somewhat by location, time of season, and geographic origin. Overall, ski resorts in the area attracted slightly older visitors (average age 45.2) and the age profile skewed somewhat older in late winter as compared to spring (44.1 vs. 41.7). Out-of-state visitors are slightly younger, on average, than in-state visitors (42.6 vs. 43.3).

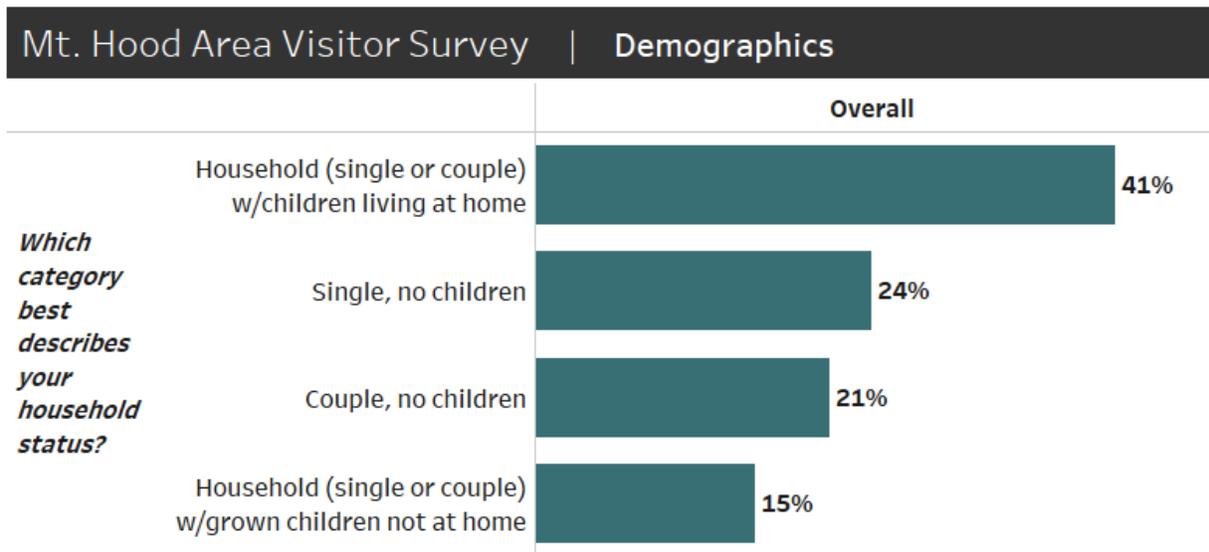
Figure 4



Source: RRC Associates

- Household Composition.** The largest segment of visitors to the region were households with children living at home (41 percent). In contrast, 59 percent of visitors to the region do not have children at home. Visitors particularly likely to have children include overnight visitors (48 percent), visitors to the ski areas (48 percent), and Oregon residents (43 percent).

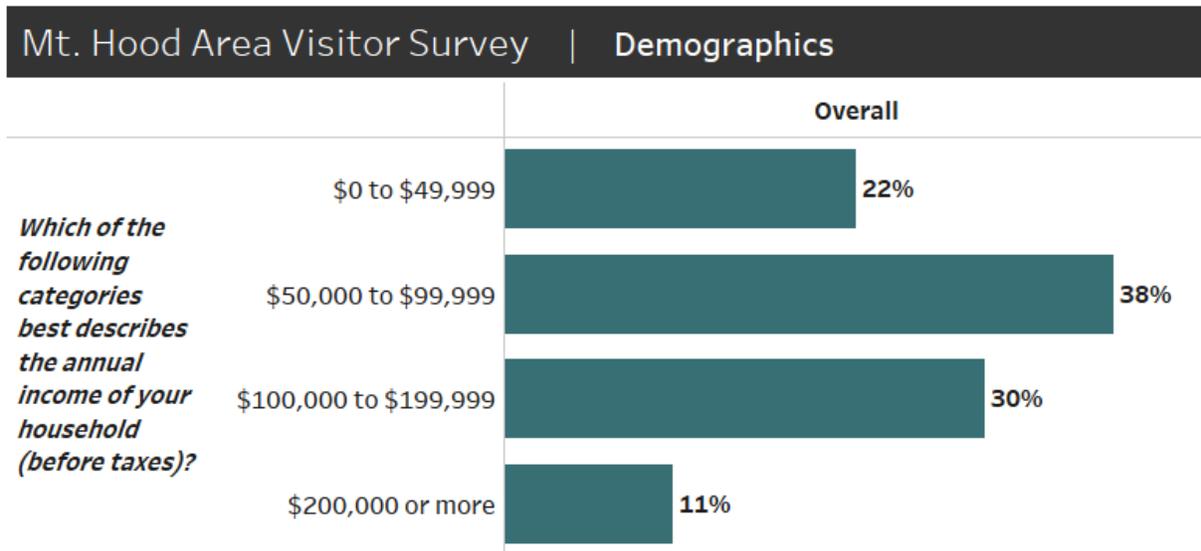
Figure 5



Source: RRC Associates

- Annual Household Income.** The Mt. Hood area is a draw for visitors, regardless of income – highly affluent and less affluent guests were identified throughout the region. Households with children skewed more affluent (19 percent earn at least \$200,000 annually), as did ski resort visitors (18 percent), and wintertime visitors (13 percent).

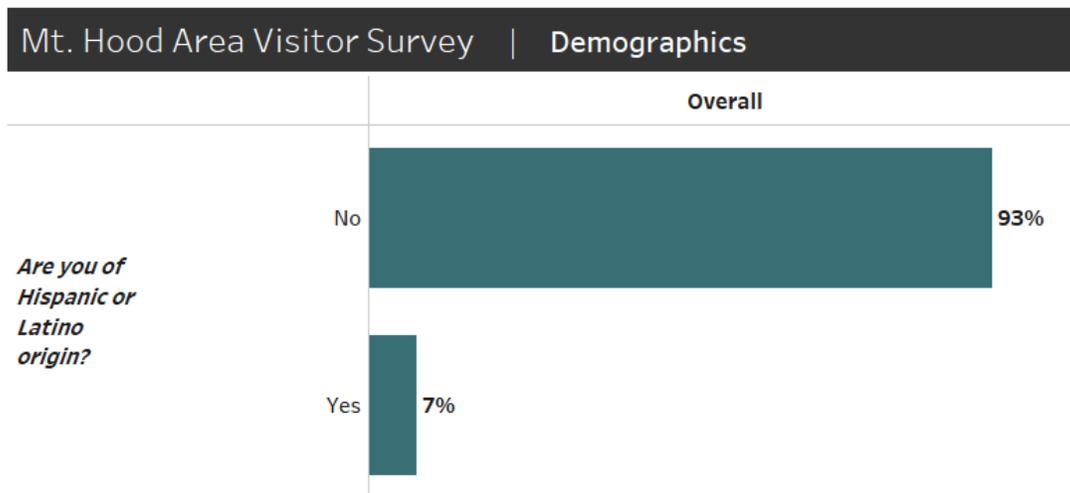
Figure 6



Source: RRC Associates

- Race/Ethnicity.** Overall, there is opportunity to broaden the diversity of visitors to the Mt. Hood region. In particular, the share of respondents who identify as Hispanic or Latino was notably lower than the Oregon population as a whole (7 percent in the survey results vs. 13 percent of Oregonians, according to Census data). Although, it should be noted that Estacada had a higher share of visitors identifying as Hispanic or Latino (11 percent) than other survey locations.

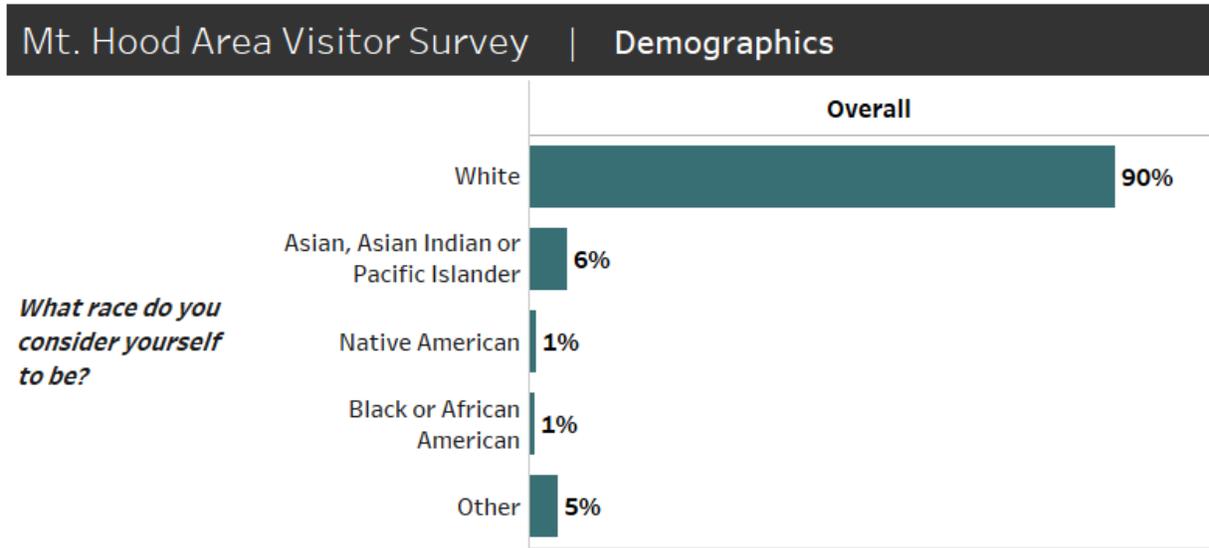
Figure 7



Source: RRC Associates

- About nine in ten of all respondents identify as White (90 percent), distantly followed by 6 percent identifying as Asian, Asian Indian or Pacific Islander. A higher share of visitors identifying as Asian, Asian Indian or Pacific Islander was observed for Highway 26 locations (13 percent).

Figure 8

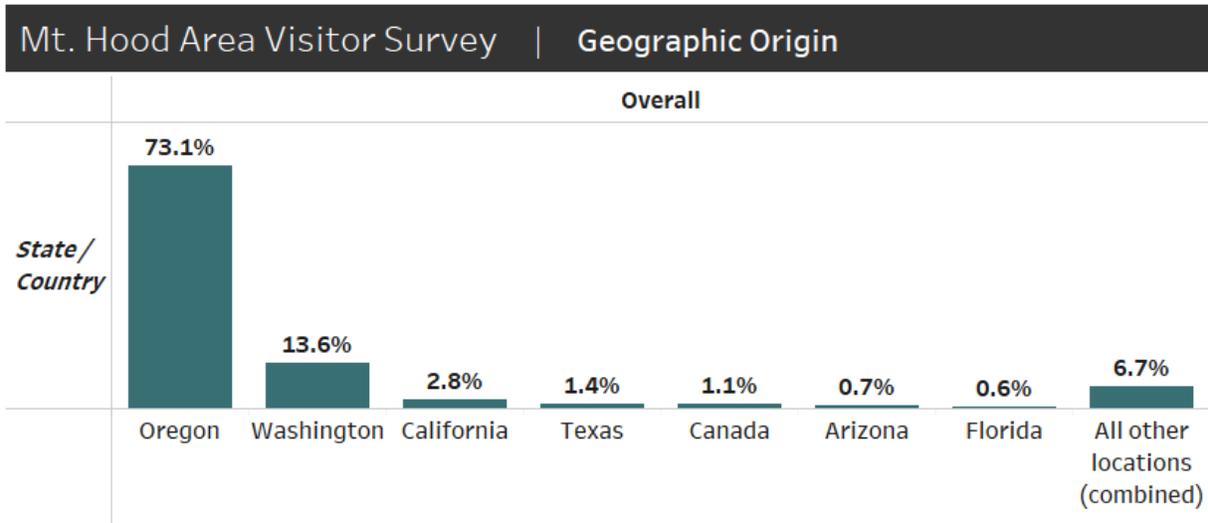


Source: RRC Associates

Geographic Origin

The Mt. Hood area attracts mostly in-state residents; nearly three-quarters of all respondents reside in Oregon (73 percent). The second most common origin of visitors is Washington (14 percent), followed distantly by California (3 percent), Texas, Canada, Arizona, and Florida (each 1 percent). Visitors from over 30 other locations collectively accounted for 7 percent of all respondents.

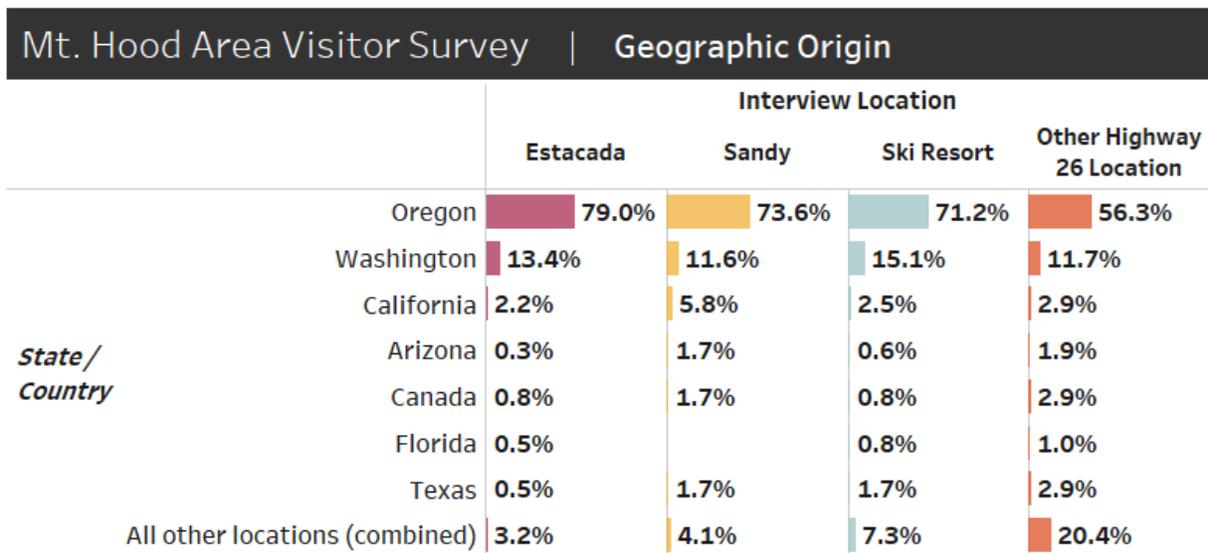
Figure 9



Source: RRC Associates

Out-of-state visitors were more likely to be found along Highway 26 locations (including ski resorts) than in Sandy and Estacada. While results should be interpreted with caution due to small sample sizes for individual locations, greater shares of out-of-state visitors were identified at Timberline Ski Area, Mt. Hood Meadows Park and Ride, Mirror Lake and Trillium Lake Trailheads, and on Mt. Hood Express.

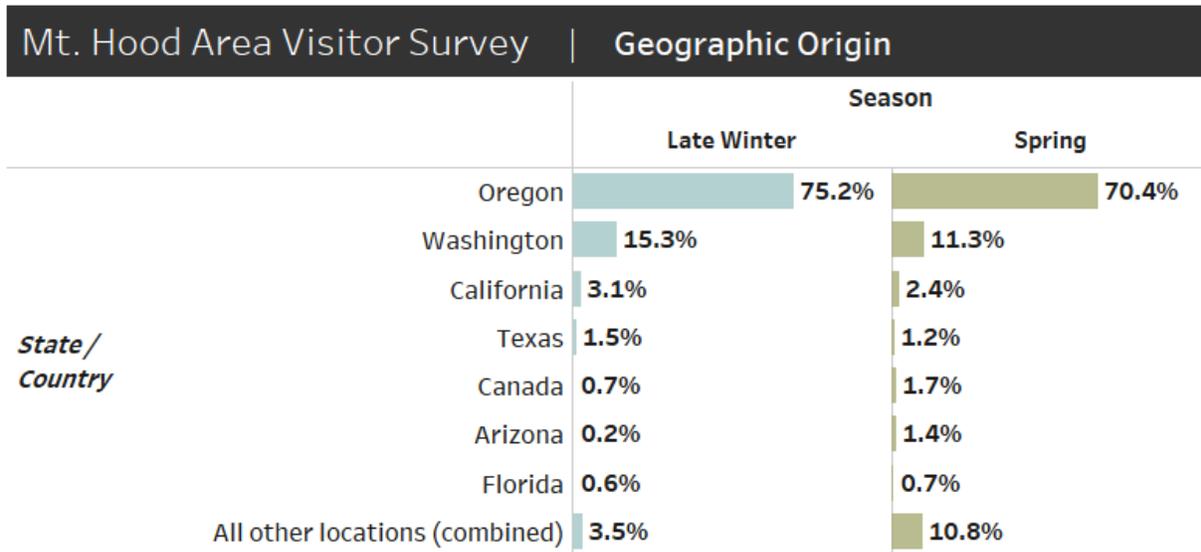
Figure 10



Source: RRC Associates

Total out-of-state visitation was proportionately higher in the spring than in late winter (30 percent vs. 25 percent). However, visitation among Washington residents was higher in late winter (15 percent) than in spring (11 percent), mostly driven by ski resort visitation.

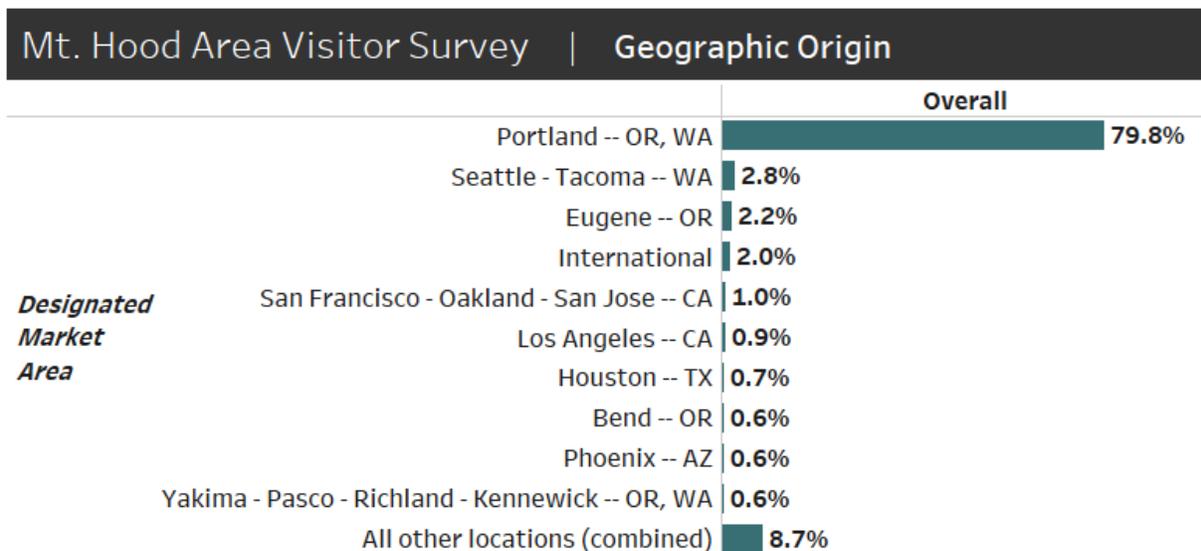
Figure 11



Source: RRC Associates

Most visitors reside in the Portland market area (80 percent), with progressively smaller shares of visitors from the Seattle-Tacoma (3 percent) or Eugene (2 percent) market areas. Two percent of all respondents were from outside of the United States, with Canada comprising the greatest share of international visitation.

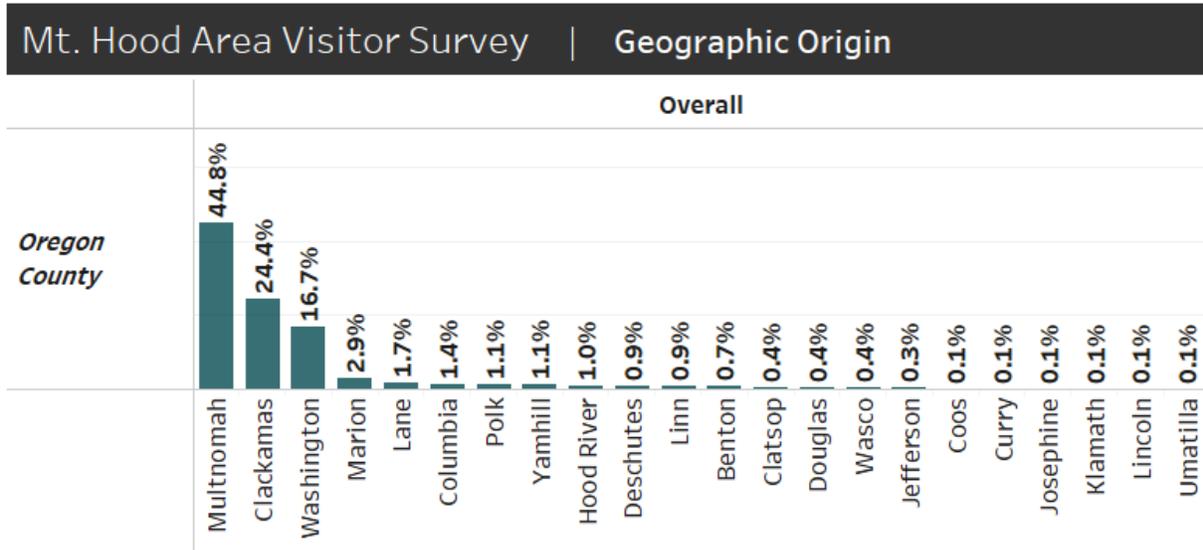
Figure 12



Source: RRC Associates

Looking just at Oregon respondents, Multnomah (45 percent), Clackamas (24 percent), and Washington (17 percent) Counties together comprised 86 percent of all in-state visitors to the region.

Figure 13

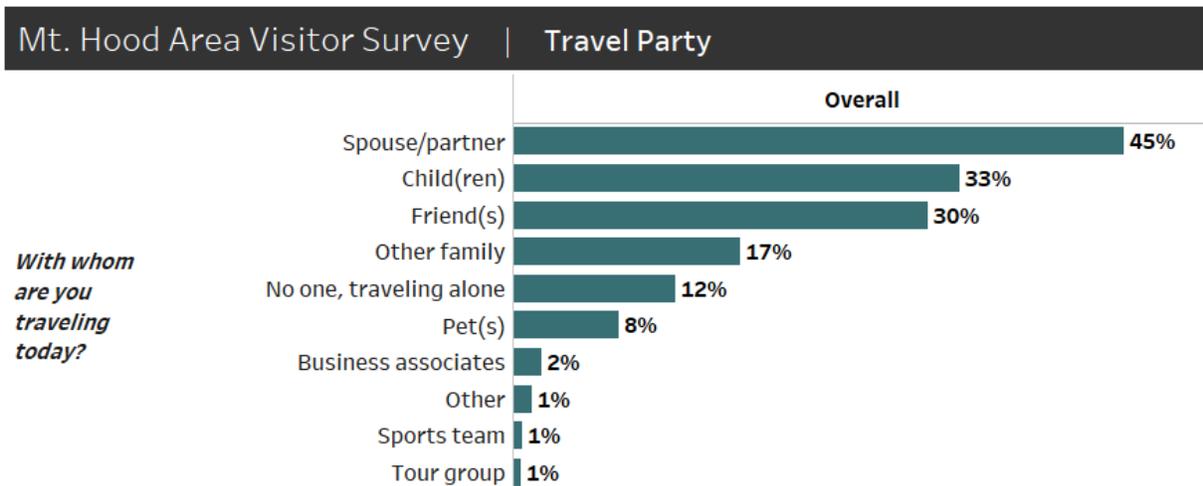


Source: RRC Associates

Travel Party Composition

Overall, visitors to the Mt. Hood area were most likely to be traveling with a spouse / partner (45 percent), child(ren) (33 percent), and/or friends (30 percent). Traveling with pets was more common among visitors surveyed in Sandy (8 percent) and Estacada (15 percent), than among those surveyed at ski resorts (1 percent) or Highway 26 (4 percent) locations. Over half of visitors to other Highway 26 locations in late winter were traveling alone (57 percent).

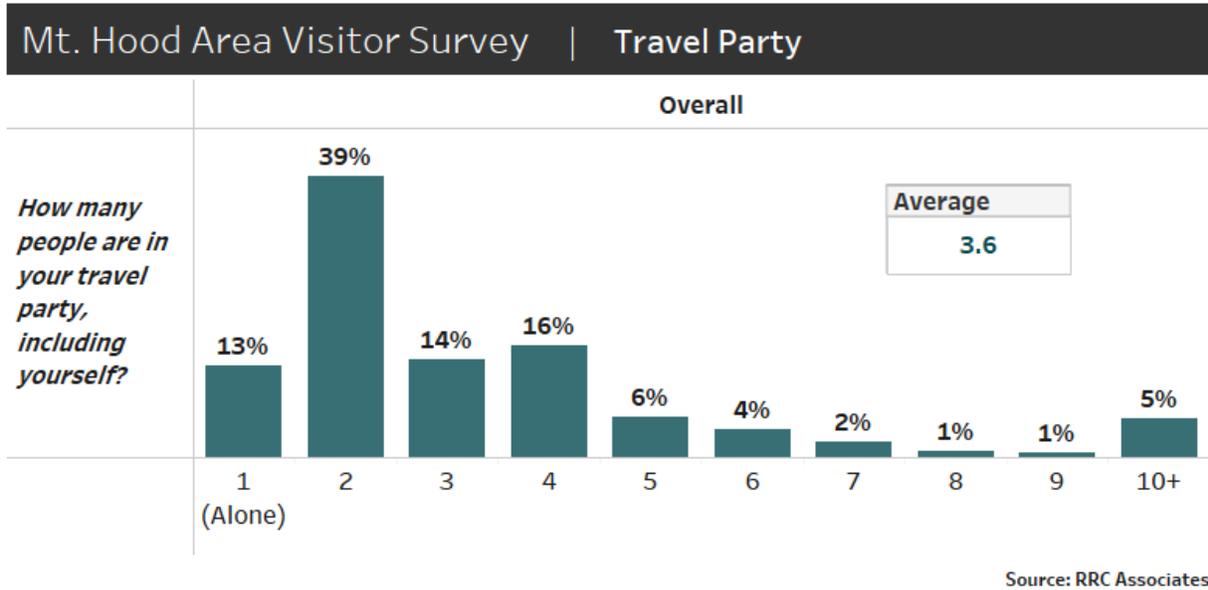
Figure 14



Source: RRC Associates

The average party size was 3.6 people. Larger average party sizes were observed among visitors surveyed in Estacada (4.1) and at the ski resorts (3.7). Larger parties were also observed in spring than in late winter (4.0 vs. 3.2).

Figure 15



Previous Visitation in Prior Two Years

Visitors have been to the area a total of 11.7 times in the past two years, on average. Average previous visitation was highest among visitors to Sandy (13.9), ski resorts (13.2), wintertime visitors (13.8), and day visitors from a nearby area (16.3).

Table 2

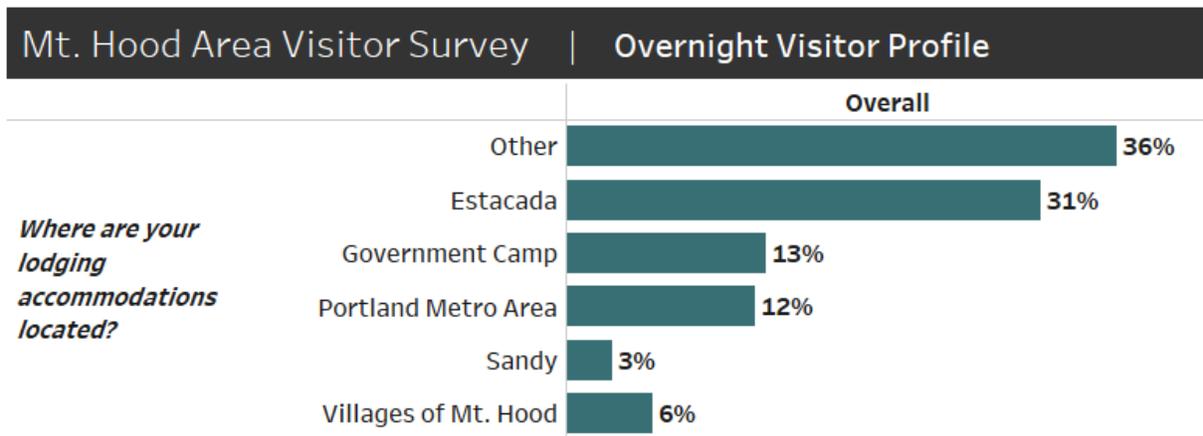
	Average Number of Visits to the Mt. Hood Area in the Prior Two Years	
<i>Overall</i>	11.7	
<i>Survey Location</i>	Estacada	10.1
	Sandy	13.9
	Ski Resort	13.2
	Other Highway 26 Location	10.1
<i>Season</i>	Late Winter	13.8
	Spring	8.8
<i>Geographic Origin</i>	Oregon resident	13.9
	Out-of-state resident	5.8
<i>Visitor Type</i>	Day visitor from a nearby area	16.3
	Day visitor to the Mt. Hood area, but staying overnight elsewhere	5.7
	Overnight visitor staying in the Mt. Hood area	7.2

OVERNIGHT VISITOR PROFILE

Location & Type of Accommodations

The most popular bed base in the area was Estacada, with nearly one-third of respondents staying there overnight (31 percent). It should be noted that this number may be inflated due to a high share of surveys conducted in Estacada and given that 54 percent of overnight respondents interviewed in Estacada stayed in Estacada. The next most common bed bases included Government Camp (13 percent) and Portland Metro Area (12 percent). A notable share of visitors also stayed overnight in an “other” location not listed (36 percent). Write-in comments for bed base highlight that a number of overnight respondents stayed in Hood River, Rhododendron, Welches, and campgrounds throughout Mt. Hood National Forest.

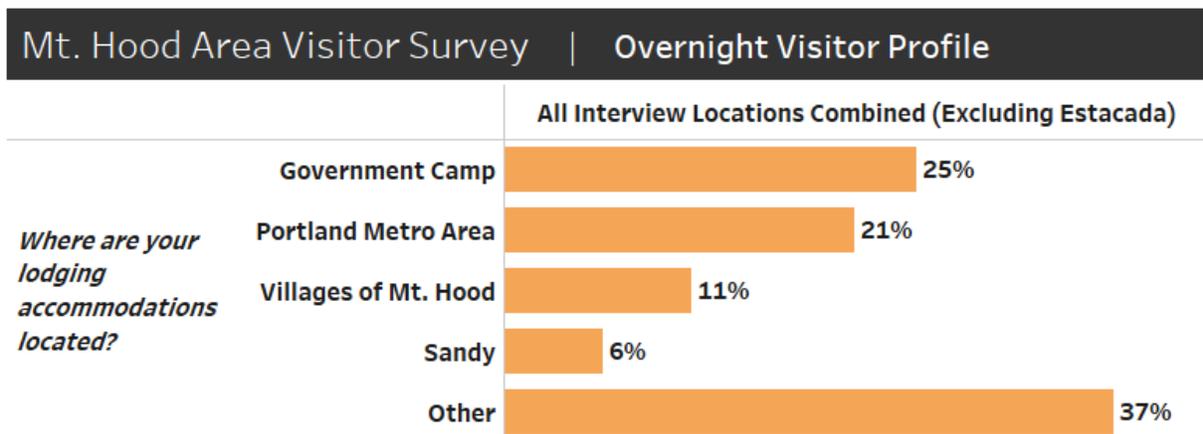
Figure 16



Source: RRC Associates

When respondents surveyed in Estacada are excluded from the sample, the share of overnight respondents staying in Government Camp (25 percent) and Portland Metro Area (21 percent) are even more pronounced.

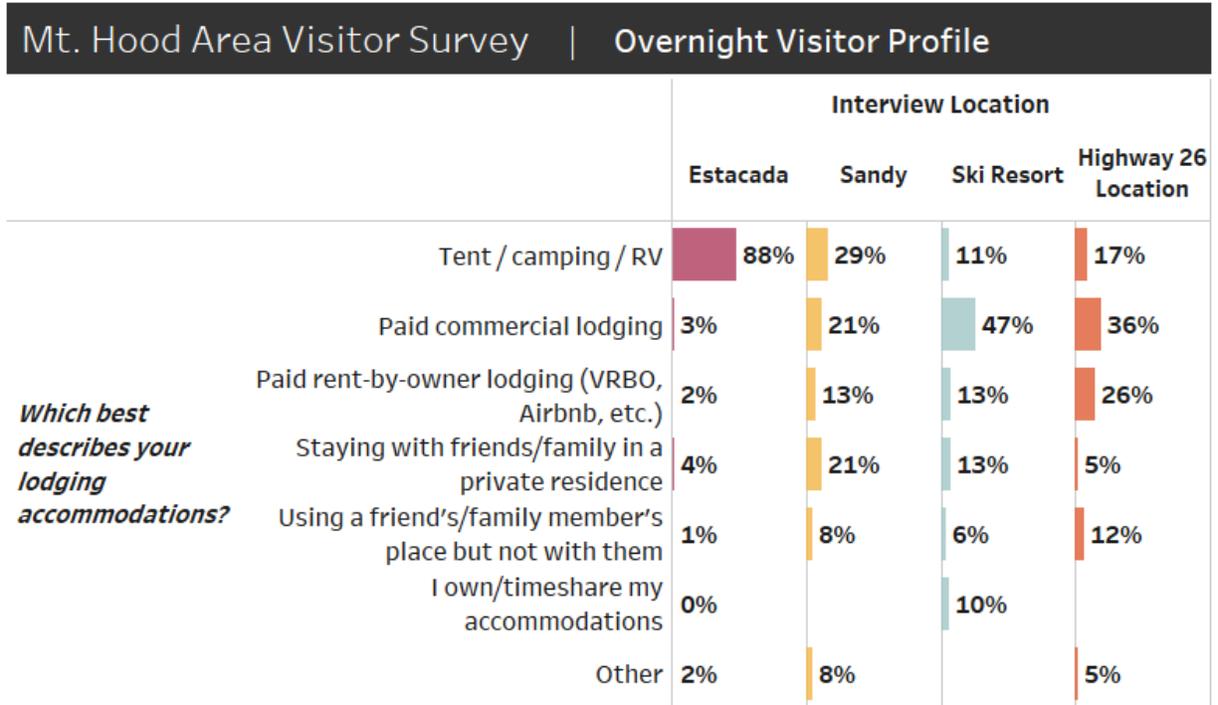
Figure 17



Source: RRC Associates

Lodging type varied considerably by interview location. Close to half of overnight respondents surveyed at ski resorts were staying in paid commercial lodging (47 percent), while nearly nine in ten overnight respondents that were surveyed in Estacada camped (88 percent). Overall, overnight visitors were most likely to camp in an RV or tent (58 percent of all respondents). However, given a high share of surveys conducted at Milo McIver State Park in Estacada, this is likely overstated.

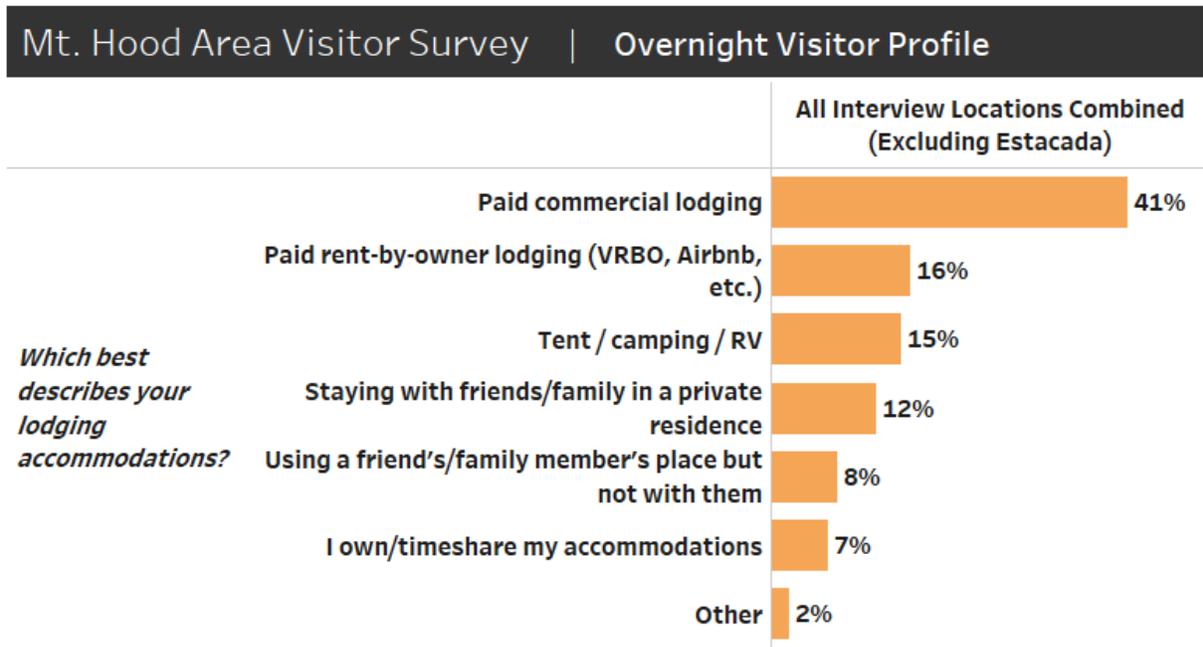
Figure 18



Source: RRC Associates

When lodging type is evaluated without respondents surveyed in Estacada, paid commercial lodging rises to the top as the most popular type of accommodations (41 percent). In a second tier of responses, prevalent types of lodging include rental-by-owner (RBO) accommodations (16 percent), tent/camping/RV (15 percent), and staying with friends/family in a private residence (12 percent).

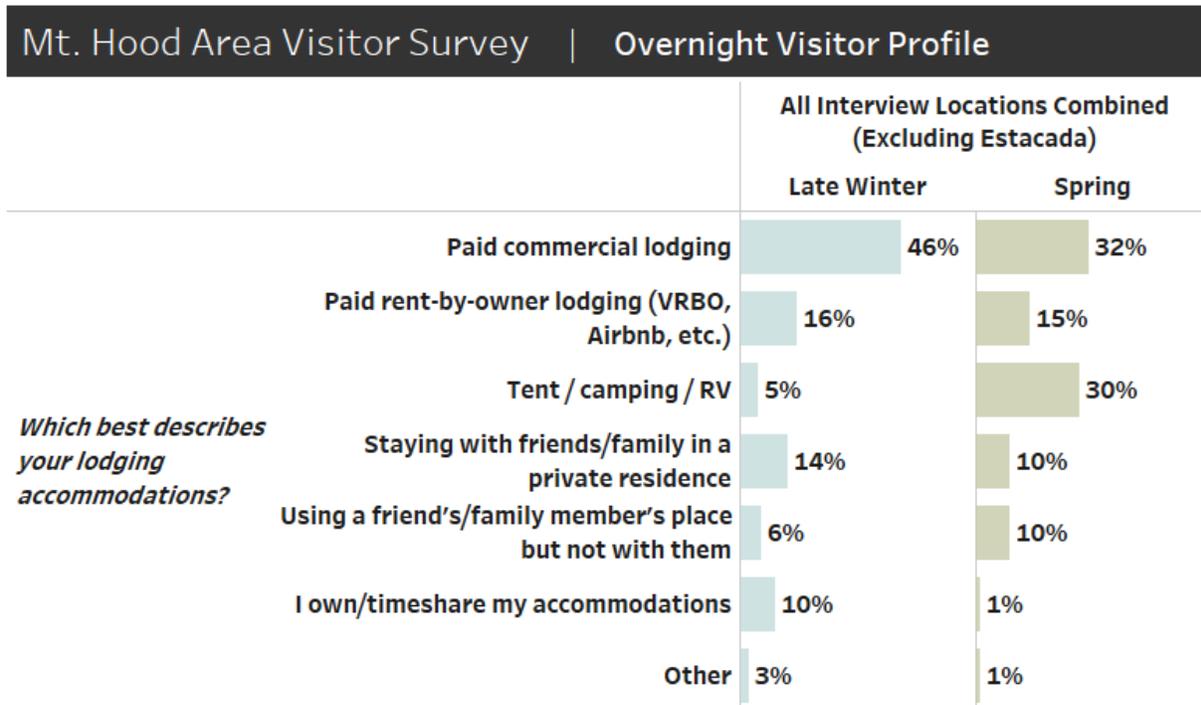
Figure 19



Source: RRC Associates

As might be expected, camping was more popular in the spring (30 percent vs. 5 percent), while paid commercial lodging was more common in late winter (46 percent vs. 32 percent), but still the most used type of accommodations regardless of season. The shares of respondents staying in RBO accommodations or with family/friends were relatively consistent, regardless of season. Meanwhile, the share of respondents staying in their own or timeshared accommodations was higher in late winter than spring (10 percent vs. 1 percent). Oregon residents were much more likely to camp as compared to visitors coming from out-of-state.

Figure 20

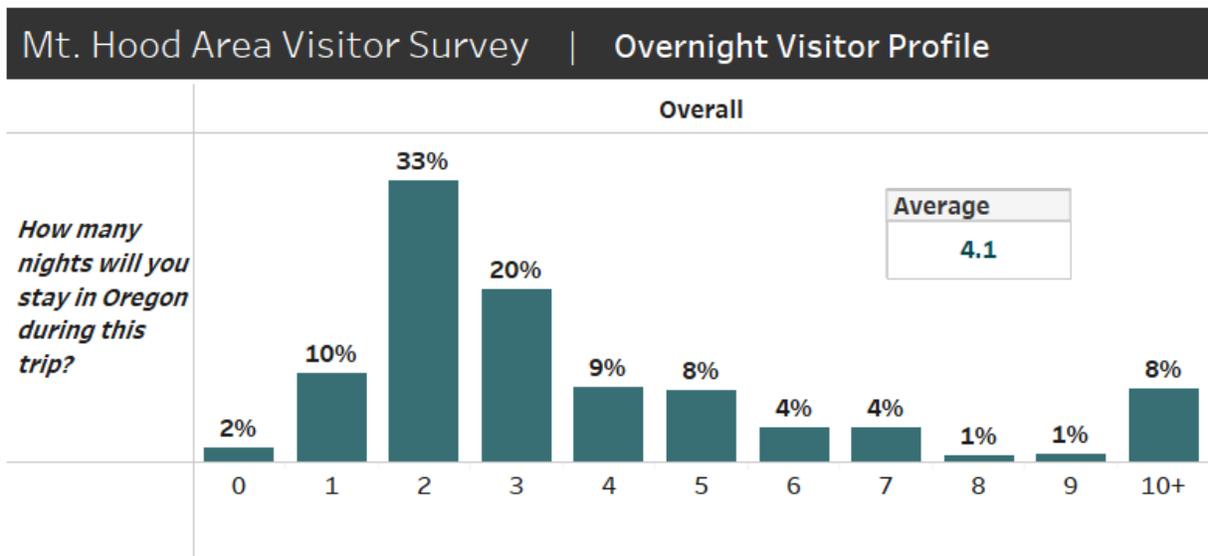


Source: RRC Associates

Length of Stay

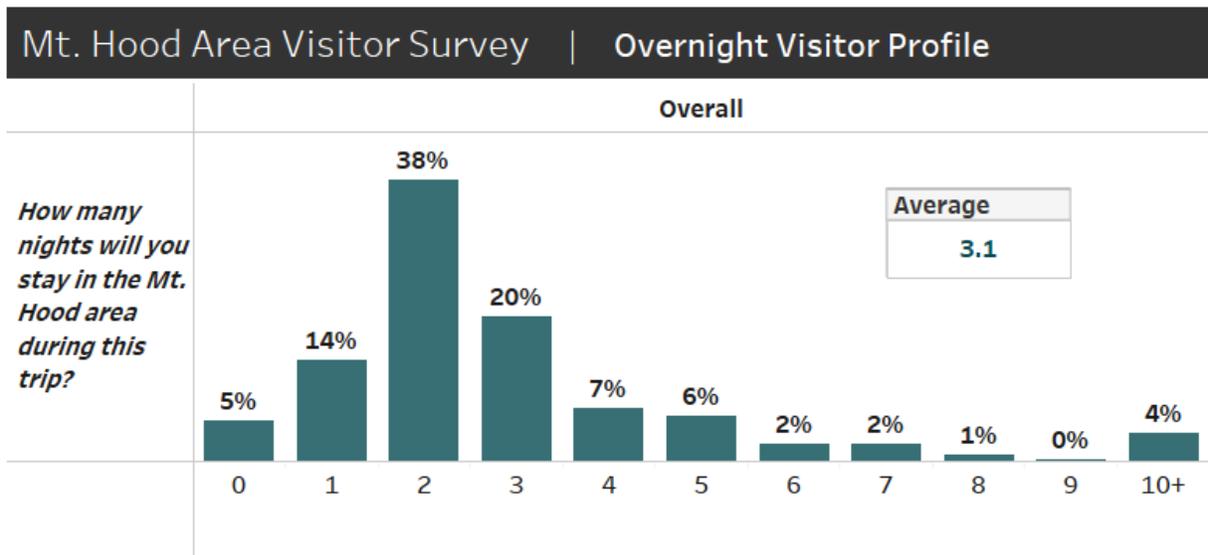
Overnight visitors stayed an average of 4.1 nights in Oregon and 3.1 nights in the Mt. Hood area, for a capture rate of 76 percent. Average nights stayed in both Oregon and the Mt. Hood area were higher in late winter Oregon, 3.5 in the Mt. Hood area: capture rate of 76 percent) than in the spring (3.9 nights in Oregon, 2.9 in the Mt. Hood area: capture rate of 74 percent), although the capture rate remained steady regardless of season. By accommodation type, those staying with friends or family in their private residence tended to stay the longest on average (5.0 nights), followed by those in RBO accommodations (4.9), paid commercial lodging (4.4), and then tent/camping/RV (3.8).

Figure 21



Source: RRC Associates

Figure 22



Source: RRC Associates

TRIP CHARACTERISTICS

Main Purpose of Visit

By far, visitors to the Mt. Hood area were visiting for leisure/outdoor recreation (87 percent). This was the primary reason for visiting regardless of location, although visitors to Estacada were more likely to be visiting for a special event (note: surveys were conducted during the Upper Clackamas Whitewater Festival, which explains the higher share of Estacada respondents reporting a special event as the primary trip purpose). When results are evaluated for all locations excluding Estacada, leisure/outdoor recreation is cited by an even higher share of respondents (93 percent).

Figure 23

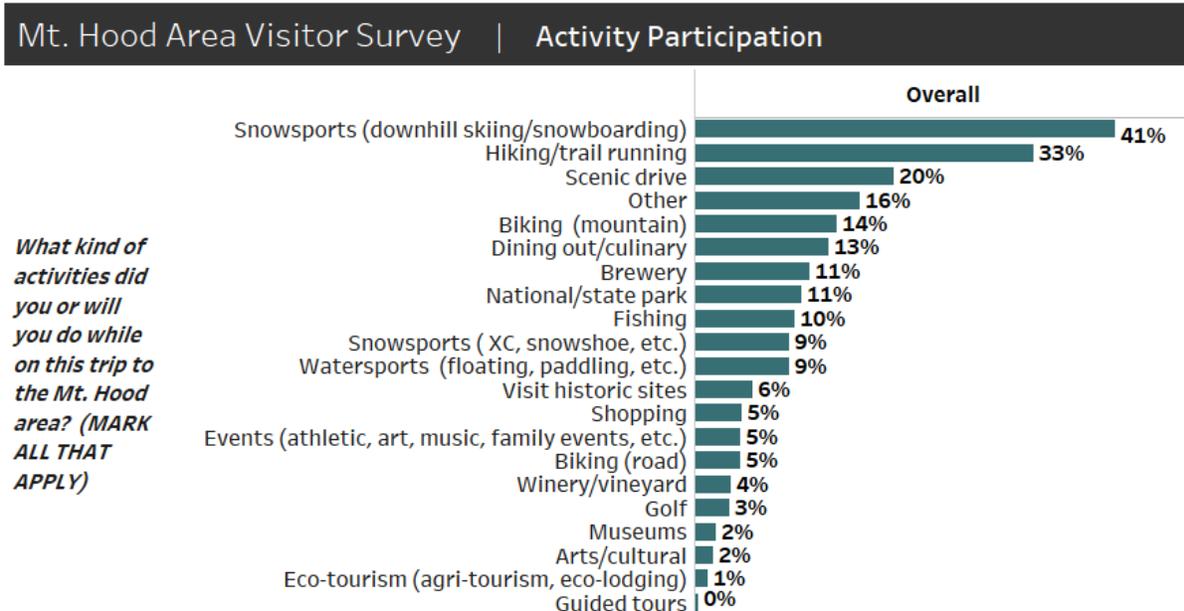


Source: RRC Associates

Activity Participation

Visitors to the area participated in a variety and number of activities in the region (2.2 on average). Downhill snowsports (41 percent) and hiking/trail running (33 percent) were the most common, with many others also participating in scenic drives (20 percent), mountain biking (14 percent), dining out (13 percent), brewery visitation (11 percent), national / state park visitation (11 percent), fishing (10 percent), other snowsports (9 percent), and watersports (9 percent). A high share of respondents indicated participating in “other” activities not listed (16 percent). A variety of answers were received, but camping and disc golf were frequently mentioned.

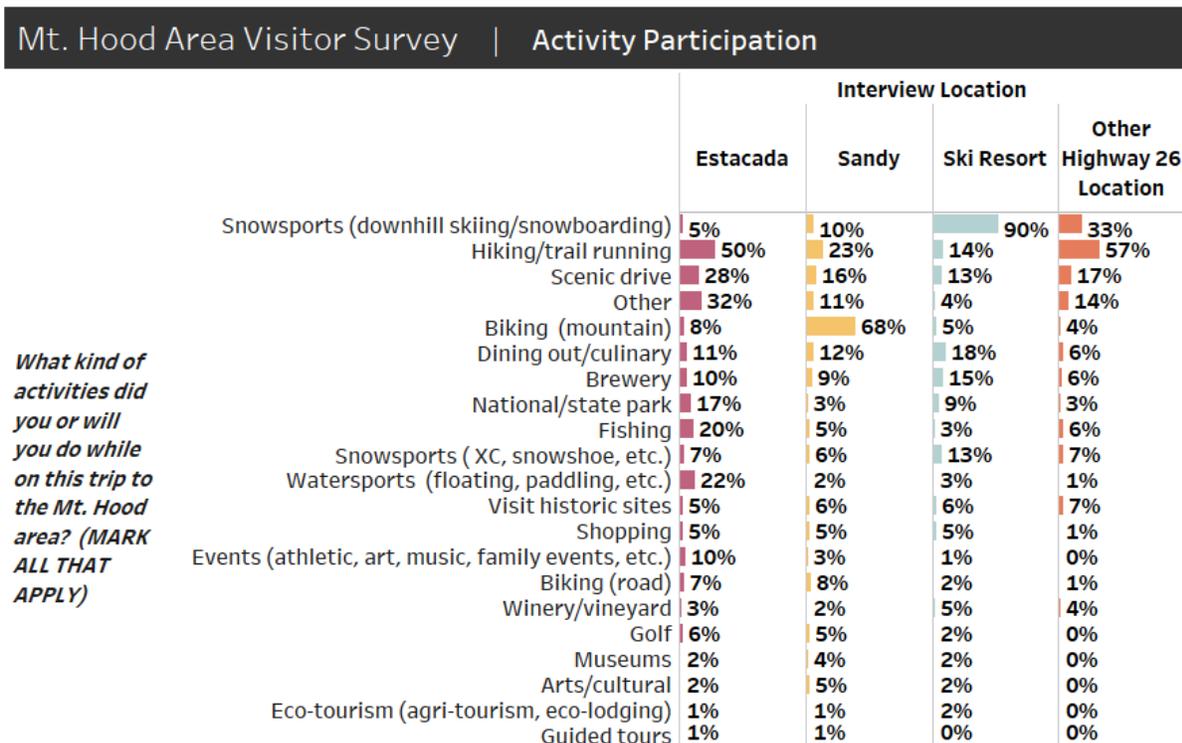
Figure 24



Source: RRC Associates

Activity participation varied considerably by where the respondent was interviewed. Hiking/trail running was most popular among respondents interviewed in Estacada and other Highway 26 locations, mountain biking for Sandy respondents and (not surprisingly) snowsports for those interviewed at the ski resorts.

Figure 25



Source: RRC Associates

Activity participation also shifted by season and geographic origin. Hiking, biking, and water-based activities were more popular in the spring. Out-of-state visitors were more likely to go on scenic drives, dine out, and visit historic sites than their in-state counterparts.

Figure 26

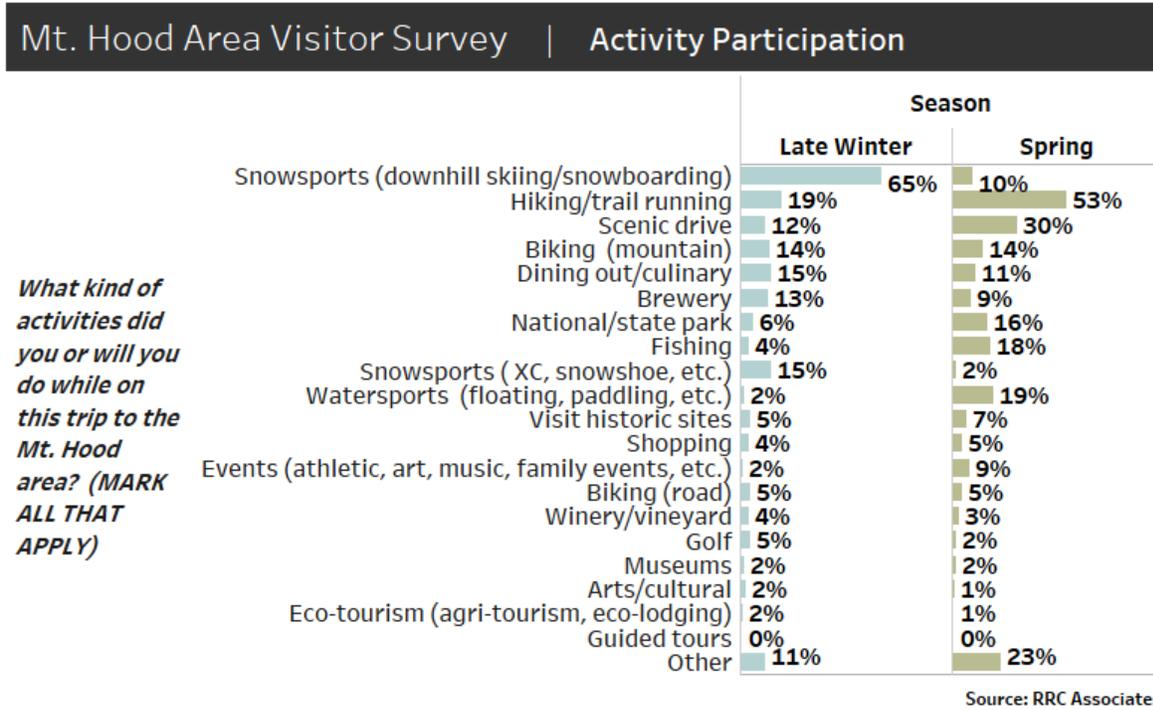
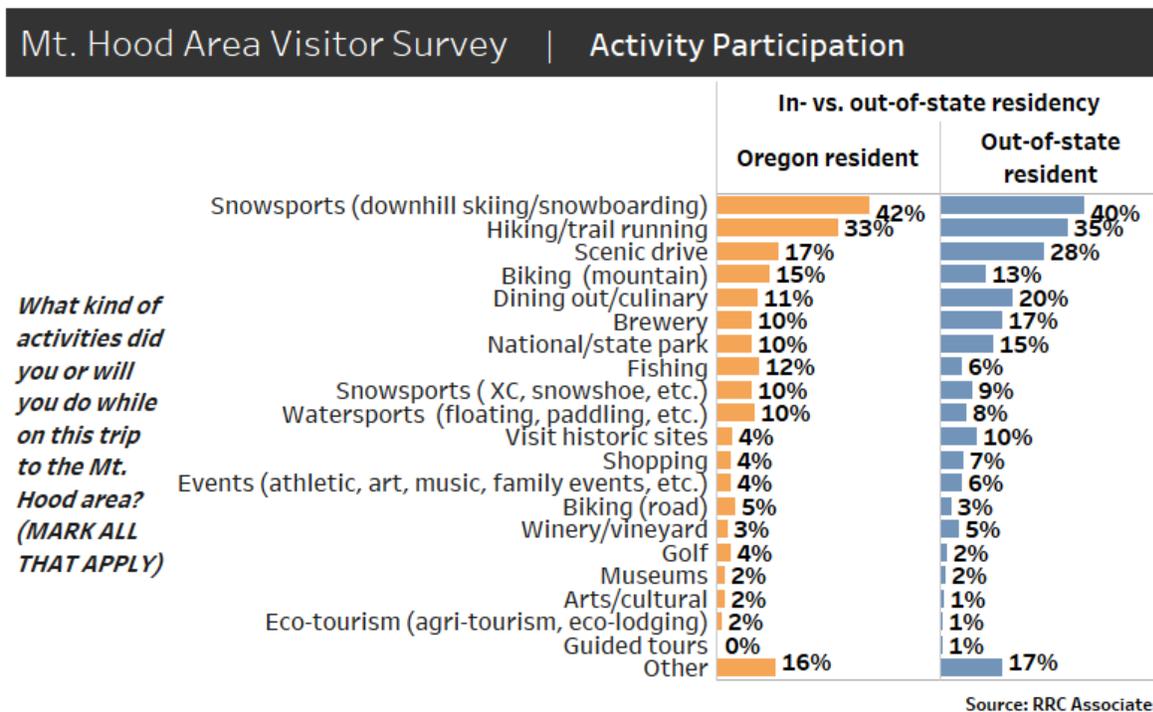


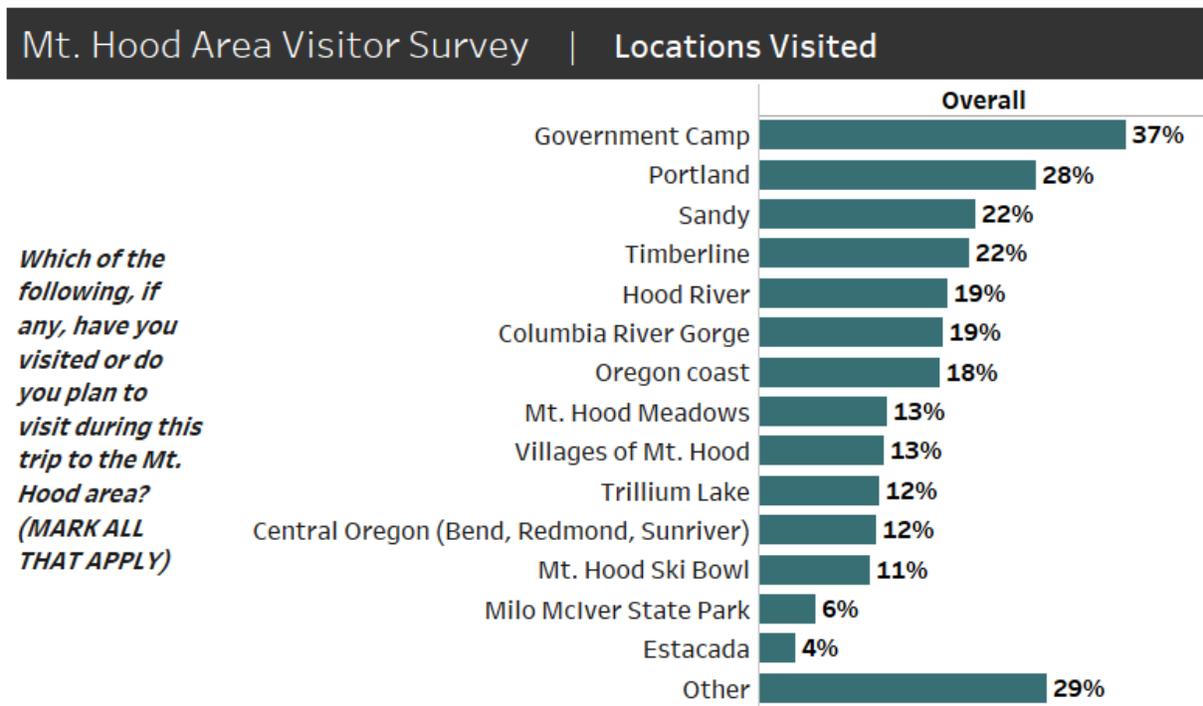
Figure 27



Locations Visited in the Area

Visitors went to a variety and number of locations (with 2.7 locations cited on average). The most common locations respondents visited while on their trip were Government Camp (37 percent), Portland (28 percent), Sandy (22 percent), Timberline (22 percent), Hood River (19 percent), Columbia River Gorge (19 percent), and the Oregon Coast (18 percent). Many cited “other” locations, with Sandy Ridge, Mirror Lake, and Zigzag Falls frequently reported in the write-in comments. Average number of locations visited was the same regardless of season, although places visited did shift somewhat (for example, Government Camp was more frequently visited in late winter than in spring—41 percent vs. 32 percent).

Figure 28



*Which of the following, if any, have you visited or do you plan to visit during this trip to the Mt. Hood area?
(MARK ALL THAT APPLY)*

Source: RRC Associates

Average Expenditures

Total average spend per party for the entire trip was \$285, with a total spend per party per day of \$184, total spend per person for the entire trip of \$91, and total spend per person per day of \$61. Lodging, recreation/entertainment/activities, and food and drink were the expenditure categories in which visitors spent the most money.

Table 3
Spending Category **Average**

PER CAPITA		
Per Day	Lodging	\$17
	Recreation/entertainment/activities	\$19
	Food & drinks	\$16
	Shopping/retail	\$4
	Other items (gas, parking)	\$6
	TOTAL	\$61
Entire Trip	Lodging	\$29
	Recreation/entertainment/activities	\$26
	Food & drinks	\$23
	Shopping/retail	\$6
	Other items (gas, parking)	\$10
	TOTAL	\$91
PER TRAVEL PARTY		
Per Day	Lodging	\$55
	Recreation/entertainment/activities	\$53
	Food & drinks	\$51
	Shopping/retail	\$11
	Other items (gas, parking)	\$19
	TOTAL	\$184
Entire Trip	Lodging	\$97
	Recreation/entertainment/activities	\$76
	Food & drinks	\$75
	Shopping/retail	\$16
	Other items (gas, parking)	\$28
	TOTAL	\$285

Visitors surveyed at the ski resorts and other Highway 26 locations spent more on average (\$405 and \$224, respectively) than visitors surveyed in Sandy (\$145) and Estacada (\$210). Additionally, spend was higher in late winter than in spring (\$295 vs. \$271), with ski-related expenditures contributing to a higher average spend overall.

Figure 29

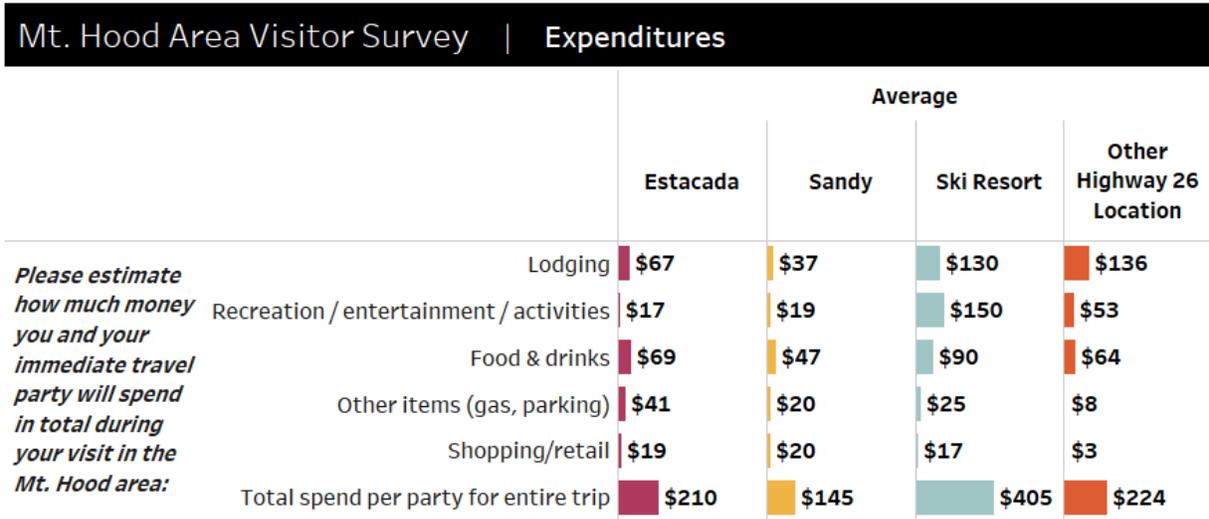
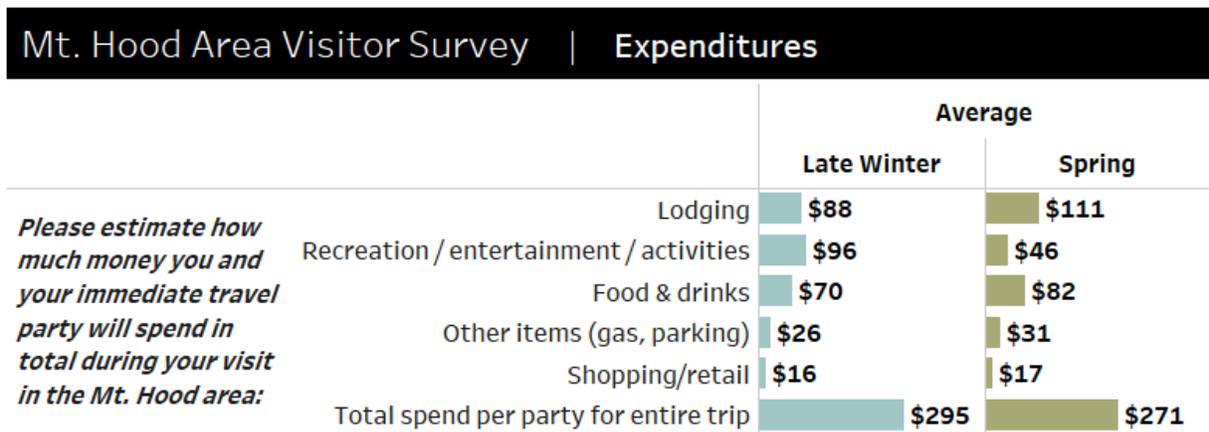


Figure 30



Overnight visitors staying in the Mt. Hood area spent more on average (\$455) than those who stayed overnight outside the region (\$329) or day visitors (\$136). Out-of-state visitors spent more than in-state residents (\$427 vs. \$223).

Figure 31

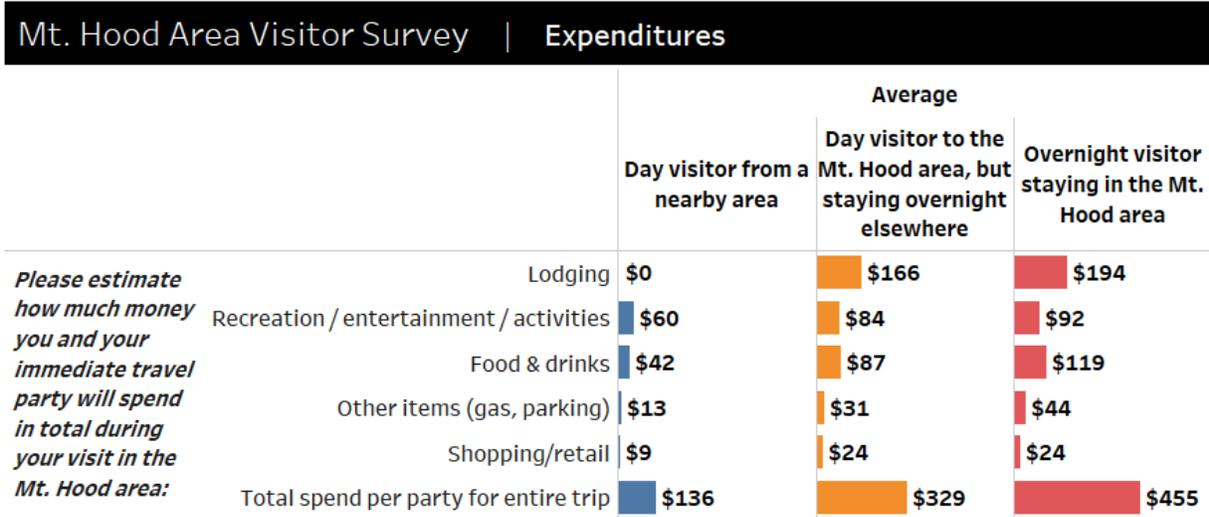


Figure 32



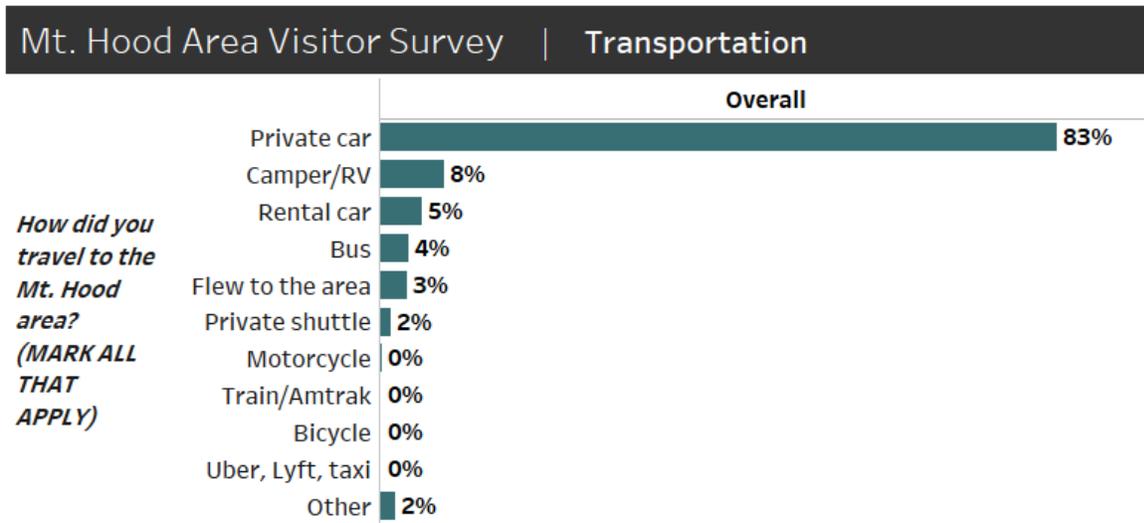
TRANSPORTATION PROFILE

A key component of the visitor study was understanding transportation methods, preferences, and barriers. This section of the report will take a detailed look at current transit patterns in the region, as well as opportunities to grow public transportation usage in the future.

Method of Travel

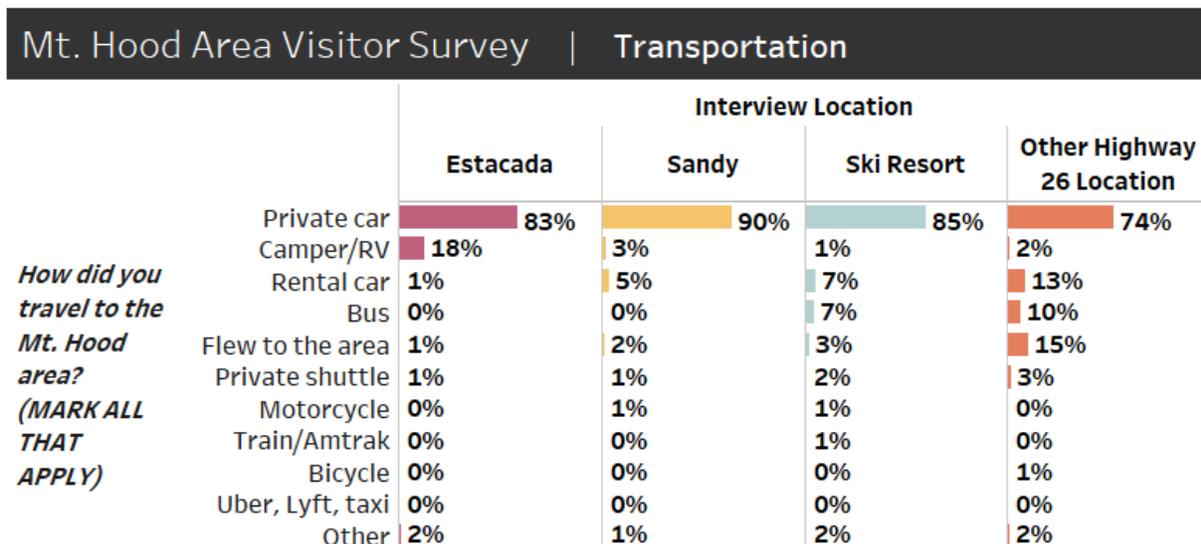
Most respondents traveled to the area by private car (83 percent), with the other travel modes each used by fewer than one in ten respondents. Visitors surveyed along Highway 26 locations were more likely to have used a rental car, bus, and/or airplane in their travels to the area.

Figure 33



Source: RRC Associates

Figure 34



Source: RRC Associates

Private cars are used proportionately more in late winter than in spring (86 percent vs. 80 percent), while a higher share of campers/RVs are used in the springtime (13 percent vs. 4 percent). The bus is also used more in late winter than in spring (5 percent vs. 1 percent). Day visitors from a nearby area are more likely to use private cars (93 percent) and the bus (5 percent).

Figure 35

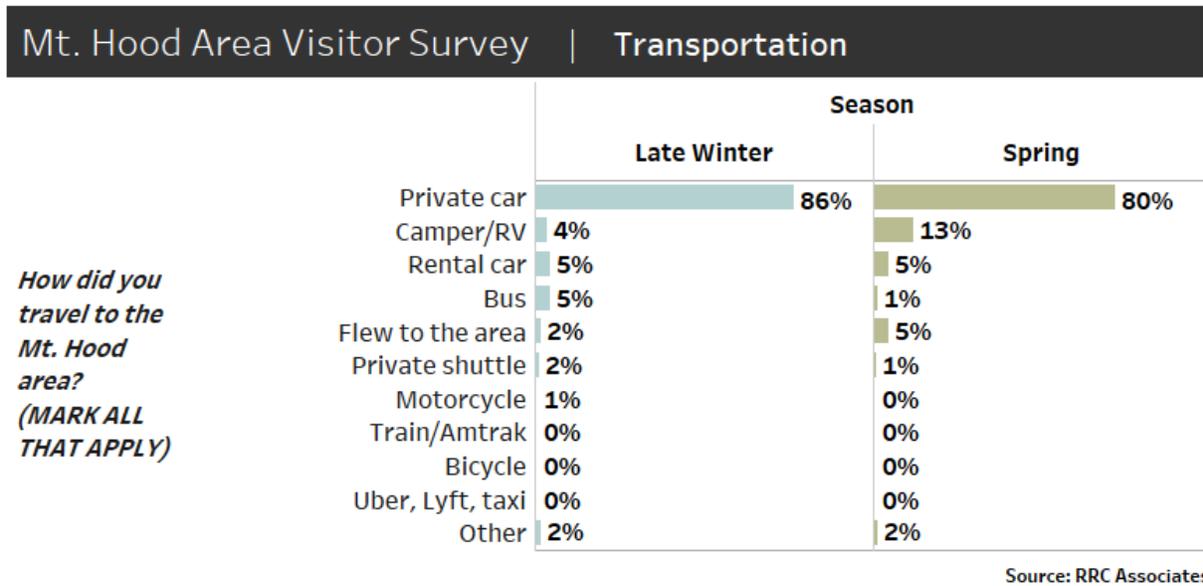
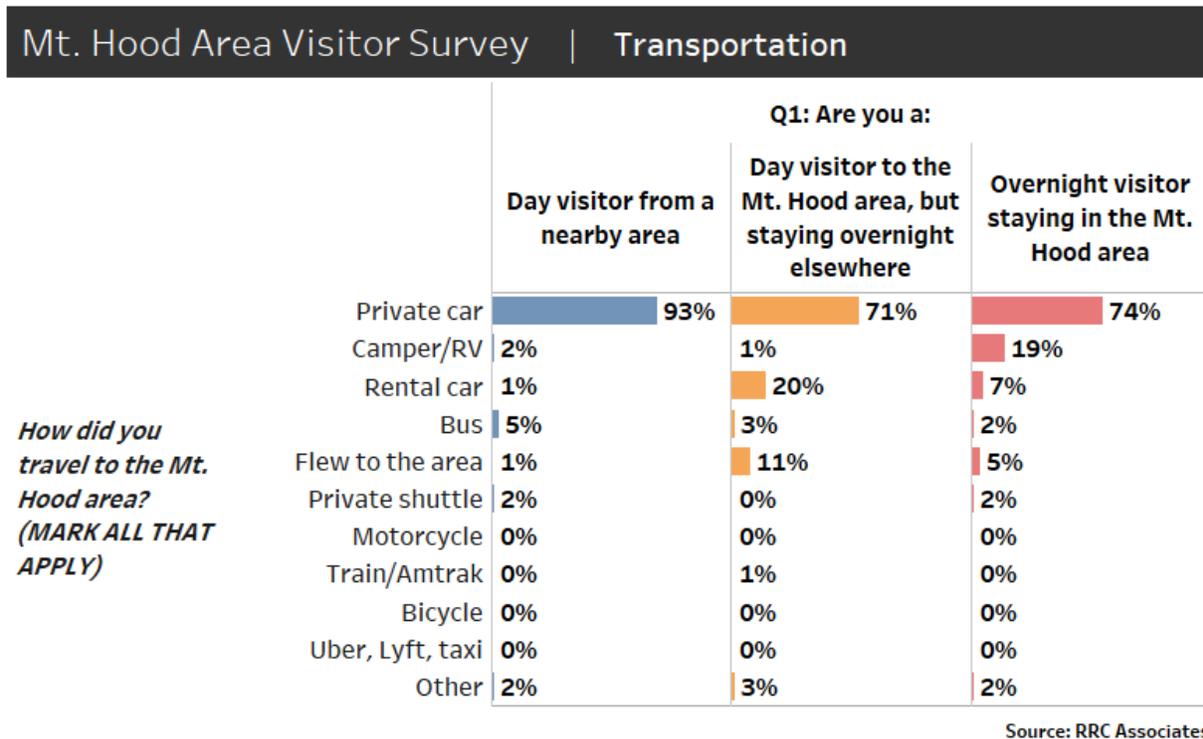
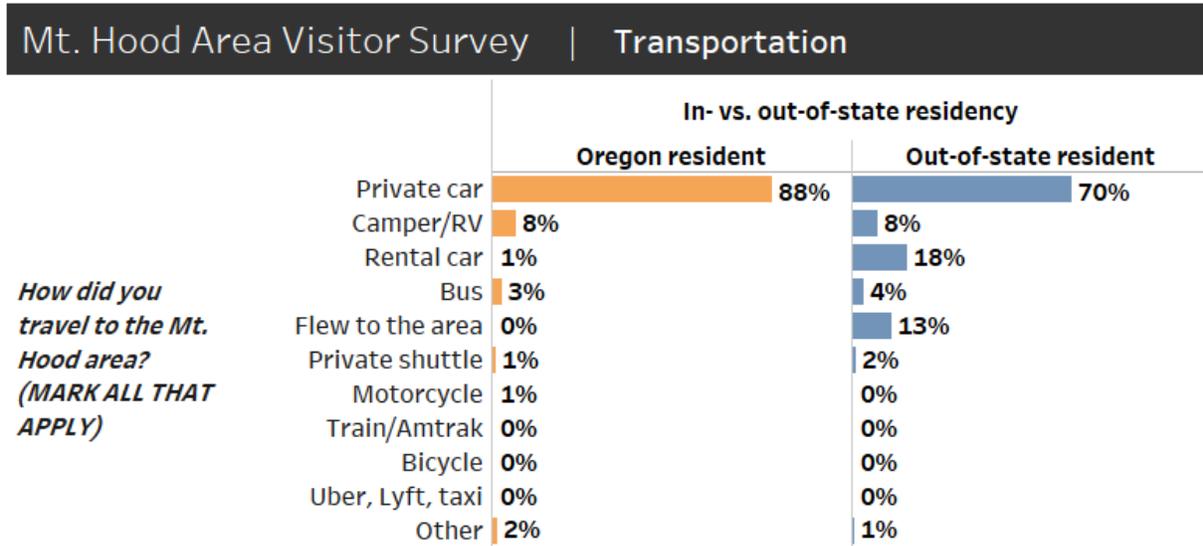


Figure 36



Thirteen percent of out-of-state visitors flew to the area and 18 percent used a rental car. Oregon residents were more likely to use a private car (88 percent vs. 70 percent). Each segment of respondents is about equally as likely to have used a camper/RV or the bus.

Figure 37

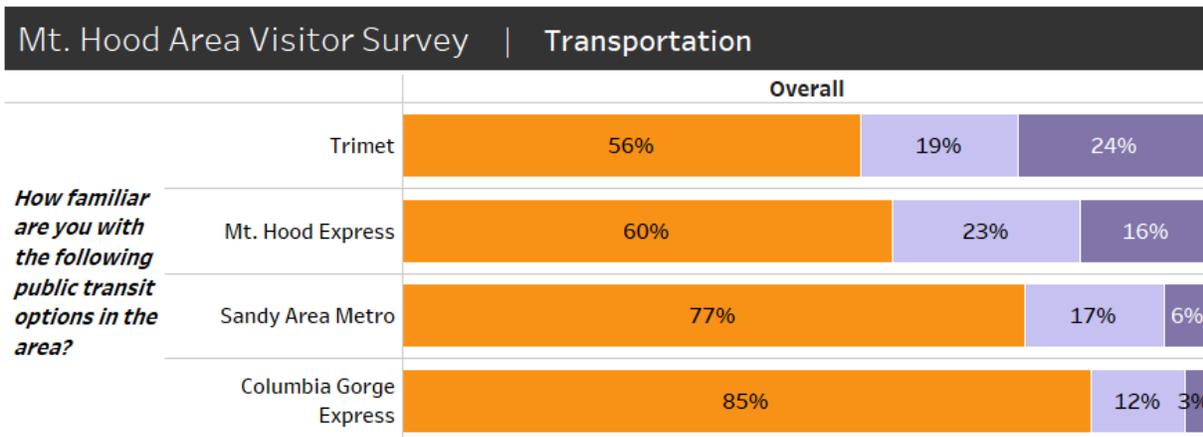


Source: RRC Associates

Familiarity with Public Transportation Options

A higher share of respondents noted they were “not at all” familiar with Trimet, Sandy Area Metro, Columbia Gorge Express, or Mt. Hood Express than the combined share of respondents who said they were either “somewhat” or “very” familiar. However, familiarity was higher for Trimet (44 percent) and Mt. Hood Express (40 percent) than for Sandy Area Metro (23 percent) or Columbia Gorge Express (15 percent).

Figure 38



Source: RRC Associates

NOT AT ALL SOMEWHAT VERY

Familiarity with the various public transit options was higher in late winter than in the spring (with the exception of Columbia Gorge Express). Day visitors were more familiar with the options than visitors staying overnight in the region or elsewhere. Similarly, Oregon residents were more familiar than out-of-state residents.

Figure 39

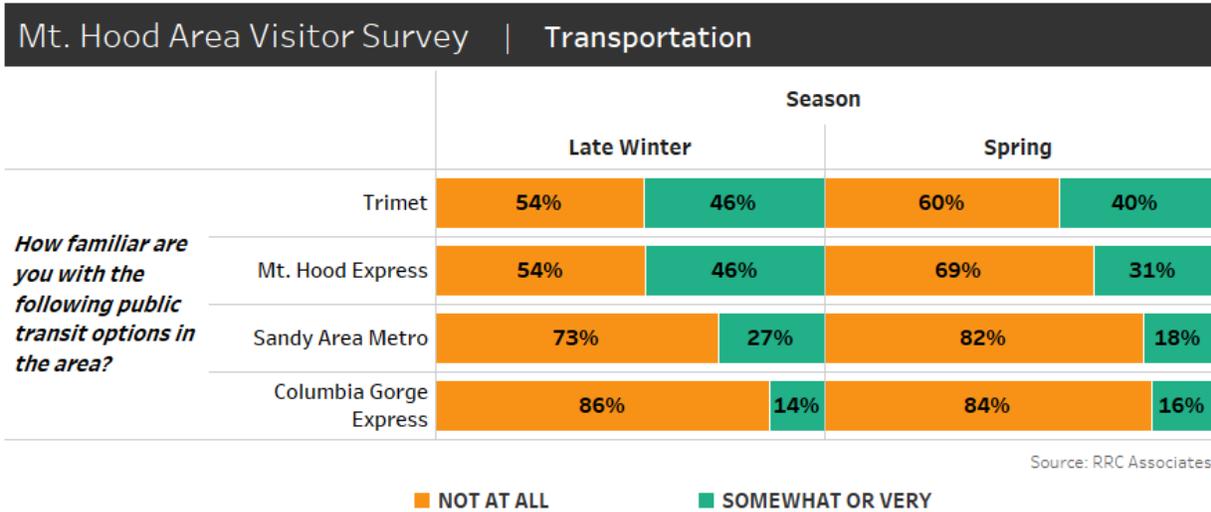
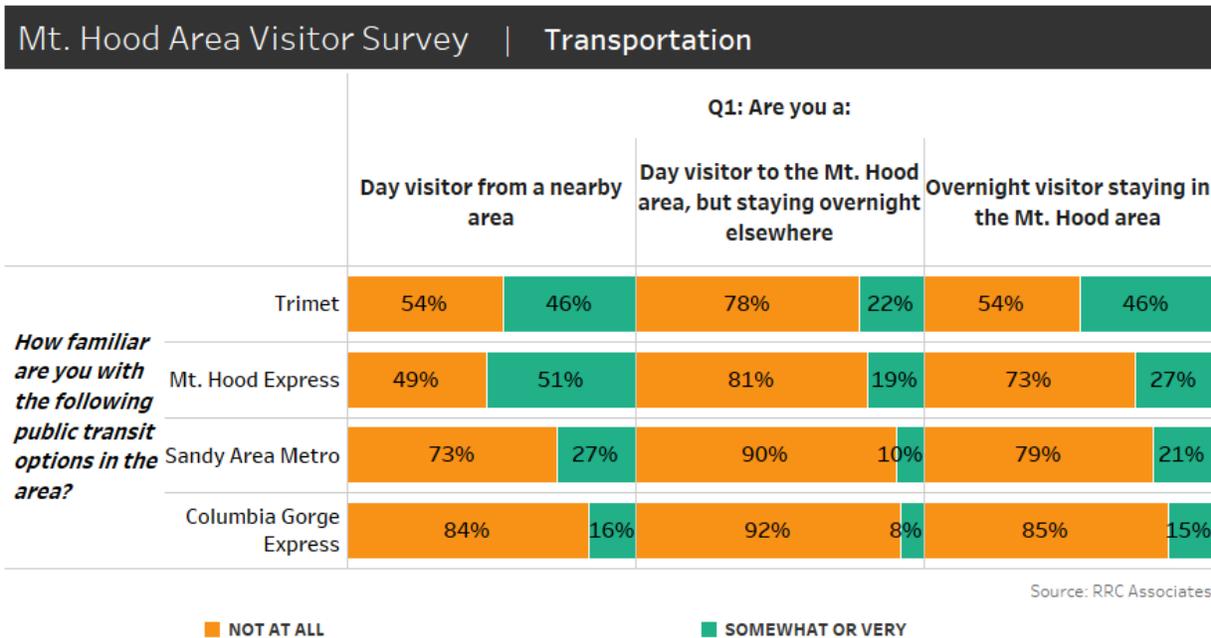
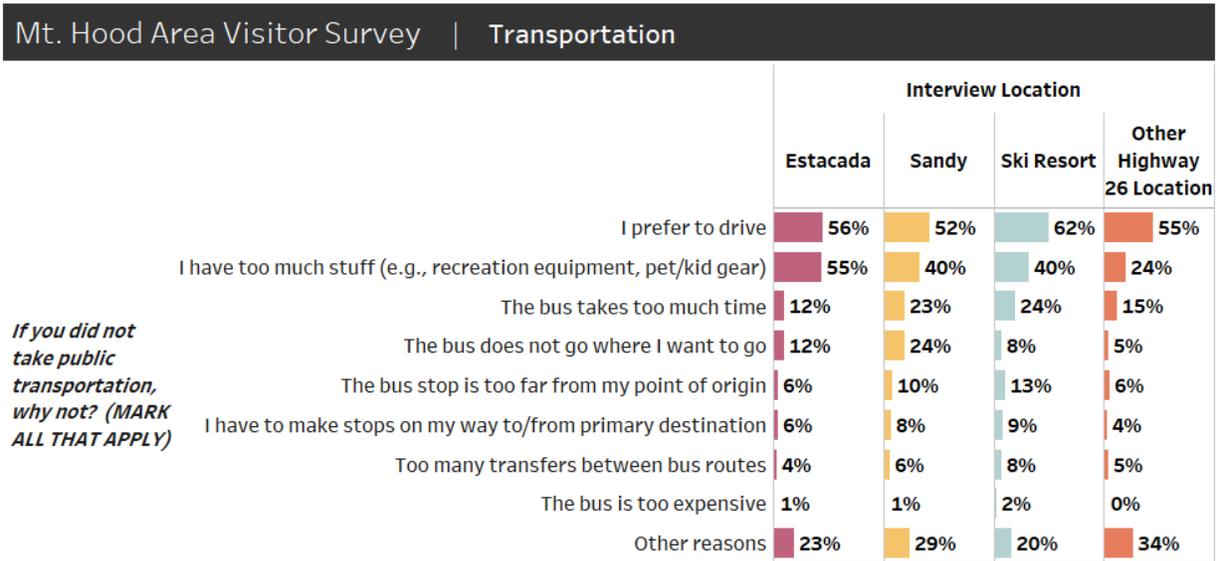


Figure 40



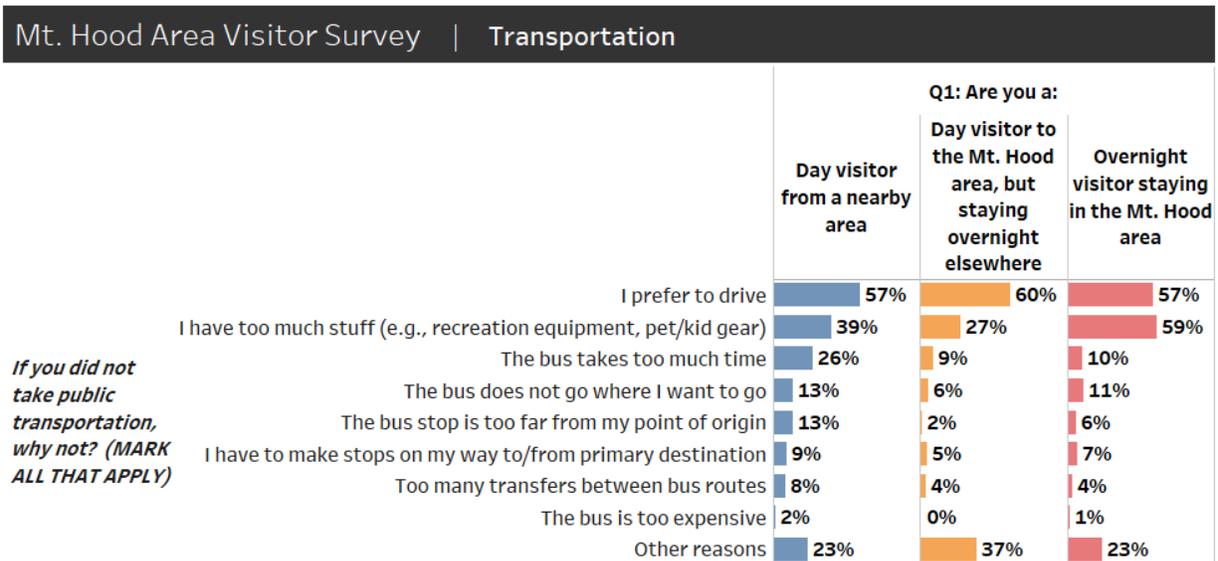
Visitors surveyed in Estacada, overnight respondents, and Oregon residents were more likely to cite “too much stuff” as a reason. Given the high share of overnight respondents in Estacada who camped (89 percent), results highlight that many respondents perceived having too much camping equipment to make taking public transportation a feasible option. “Too much stuff” was also cited more frequently in the spring than in late winter (53 percent vs. 37 percent). Day visitors from a nearby area, as well as wintertime respondents were more likely to say the bus takes too much time. Day visitors were also more likely to indicate that the bus stop is too far away from their point of origin than the other visitor types.

Figure 43



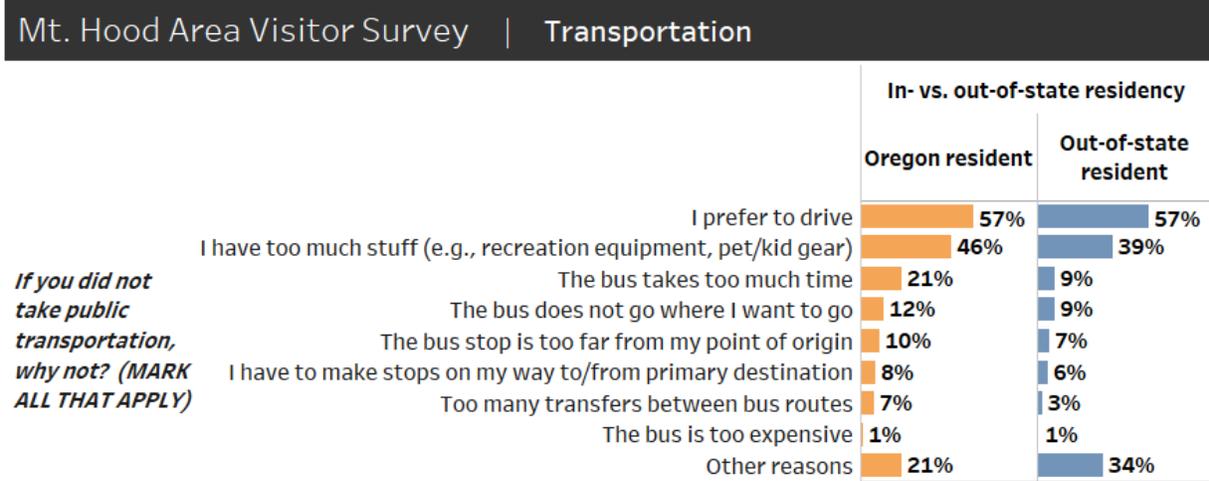
Source: RRC Associates

Figure 44



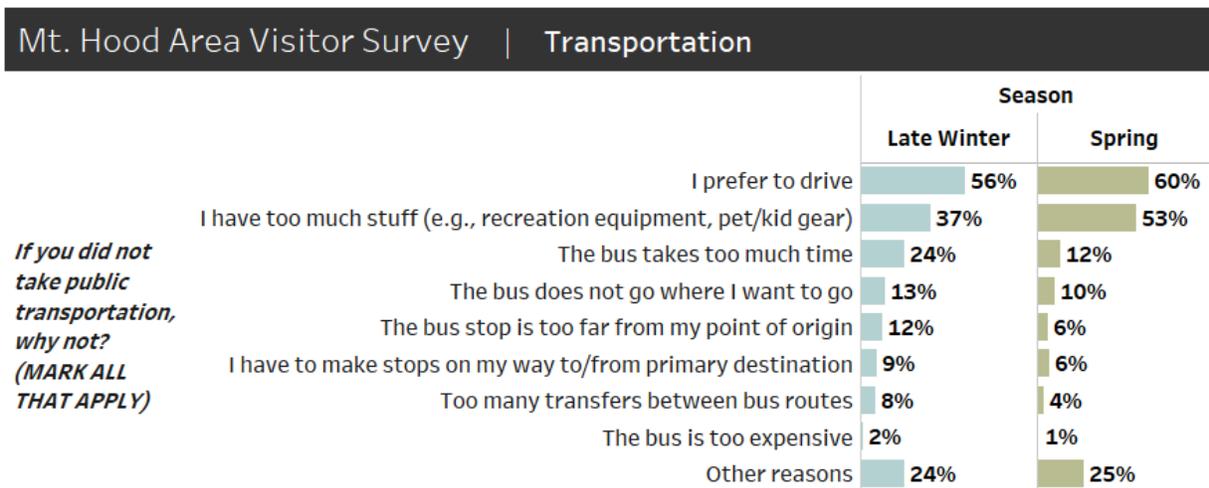
Source: RRC Associates

Figure 45



Source: RRC Associates

Figure 46



Source: RRC Associates

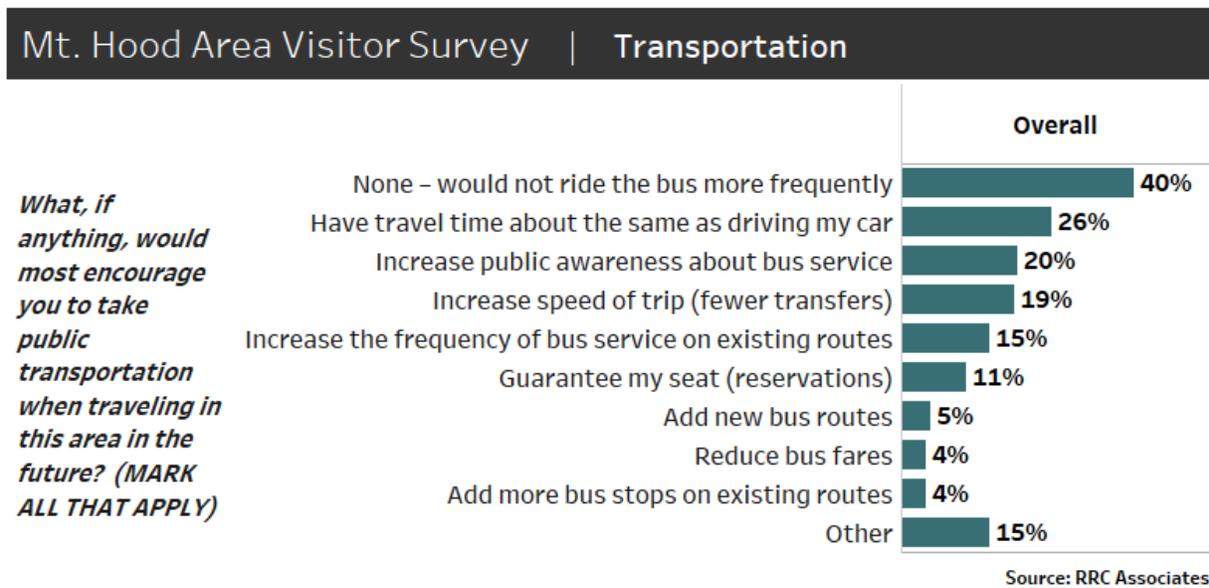
Factors That Would Increase Utilization of Public Transit

About three in five respondents who didn't take public transportation as part of their travels to the Mt. Hood area would be encouraged to take public transportation to the area in the future if some factors were addressed (60 percent). The top factor cited was having travel time be about the same as driving a car (26 percent), followed by increasing public awareness about bus service (20 percent), fewer transfers (19 percent), increasing bus service frequency (15 percent), and offering seat reservations (11 percent).

Additionally, 15 percent of respondents selected “other” factors that would encourage them to take public transportation. Responses were varied, with many reiterating why taking public transit would be inconvenient (e.g., traveling with family or dogs, have too much gear, don’t visit area often, etc.). However, others made specific suggestions of things they would like to see changed. Increased convenience, ability to travel with gear, and more frequent and consistent service came up many times in the comments. Below is a verbatim sampling of suggestions provided:

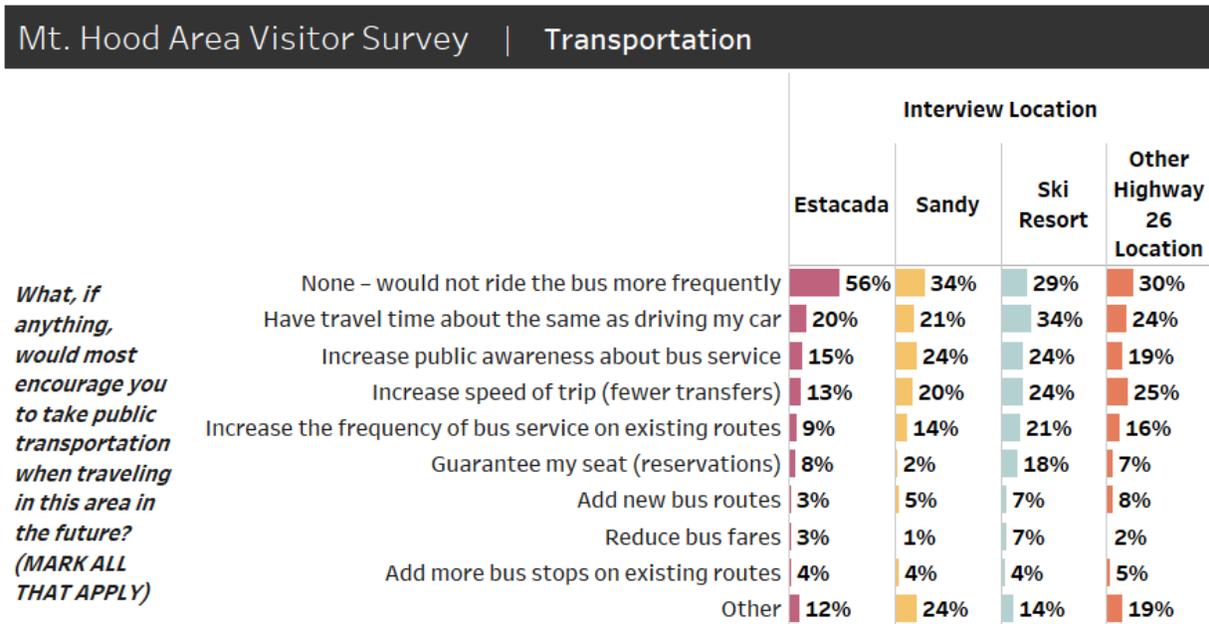
- *Address safety concerns*
- *Be able to get on and off with the same ticket/multiple stops*
- *Be able to take kayak?*
- *Bus to Timberline fills up need more buses*
- *Have service consistent with mountain being open*
- *Have used Mount Hood Express to ride from timberline to Government Camp but can't imagine much else*
- *More comfortable seats*
- *Mount Hood Express or other bus if stopped at or very nearly trailheads, I would use, if I don't have my dog.*
- *Place for gear, group seating*
- *Schedules not accurate bus late sometimes*
- *Used Mount Hood Express to Timberline but trailer scratches up bikes needs to be fixed*
- *We play it by ear on snow conditions need our own car to go place to place easily*

Figure 47



Respondents surveyed in Estacada were the least willing to take public transit in the future (56 percent; likely because of the high share of respondents who camped), while respondents interviewed elsewhere had relatively similar levels of openness to public transportation. Respondents interviewed in Sandy would most like to see increased public awareness (24 percent). Respondents surveyed at ski resorts would most like to see travel time be about the same as driving a car (34 percent). Meanwhile, respondents interviewed at other Highway 26 locations would most like to see an increased speed of trip via fewer transfers (25 percent). Ski resort respondents were more likely to cite increased frequency of service (21 percent).

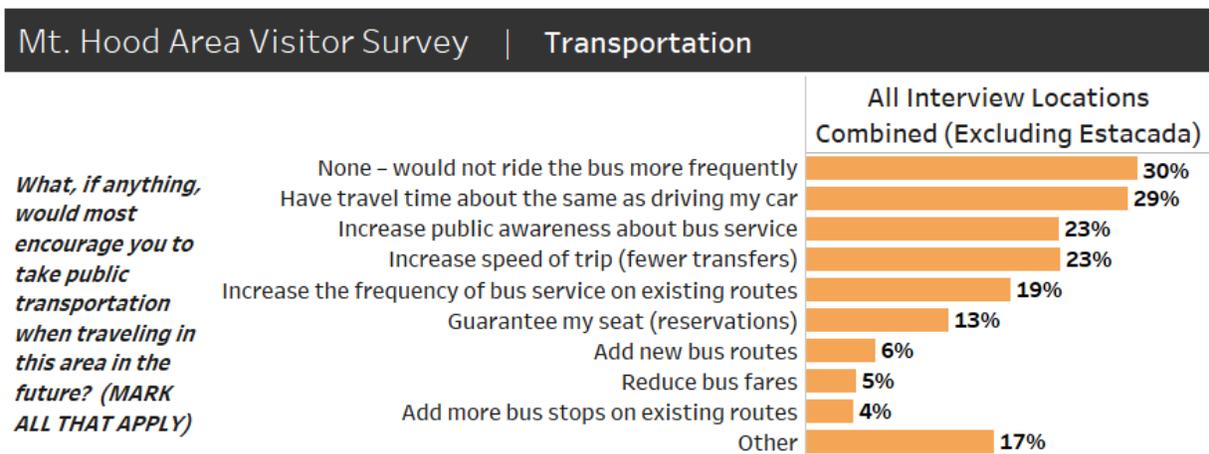
Figure 48



Source: RRC Associates

Results assessed without respondents interviewed in Estacada show that 70 percent of respondents would be willing to ride the bus more frequently (vs. 60 percent).

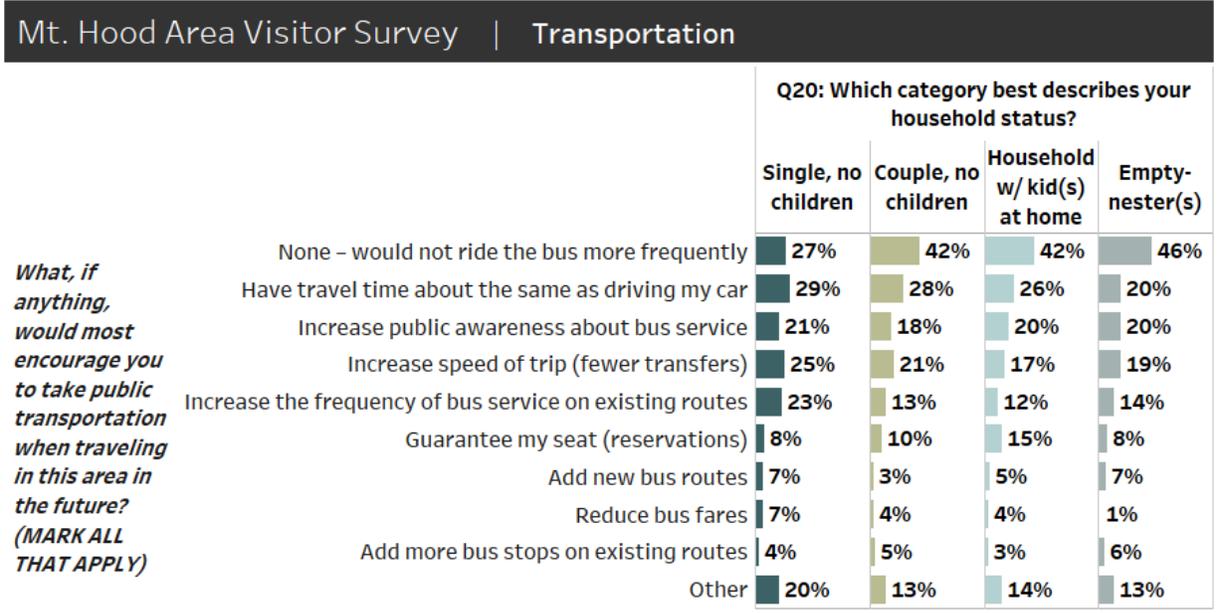
Figure 49



Source: RRC Associates

Of all household types, single respondents without kids would be the most willing to take public transportation in the future (73 percent vs. 54 to 58 percent). Single respondents without kids are more likely to select increasing the speed of trip (25 percent) and increasing frequency of service on existing routes (23 percent) as factors that would motivate them to take public transit in the future. Households with kids were more likely to select seat reservations as a motivating factor (15 percent).

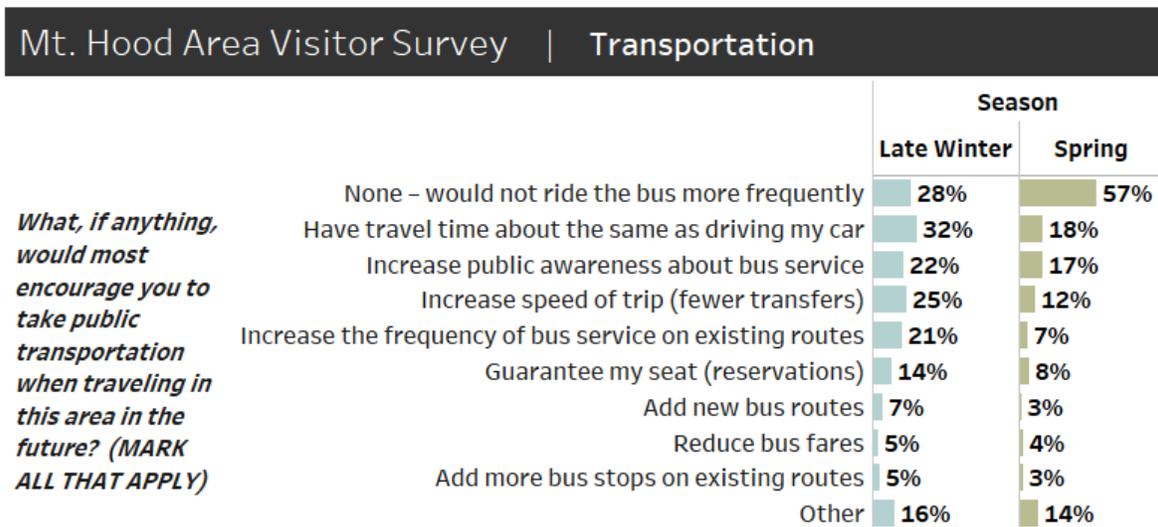
Figure 50



Source: RRC Associates

Respondents surveyed in late winter (72 percent), day visitors (72 percent), and Oregon residents (64 percent) are more open to taking the bus to the area in the future than other visitor segments.

Figure 51



Source: RRC Associates

Figure 52

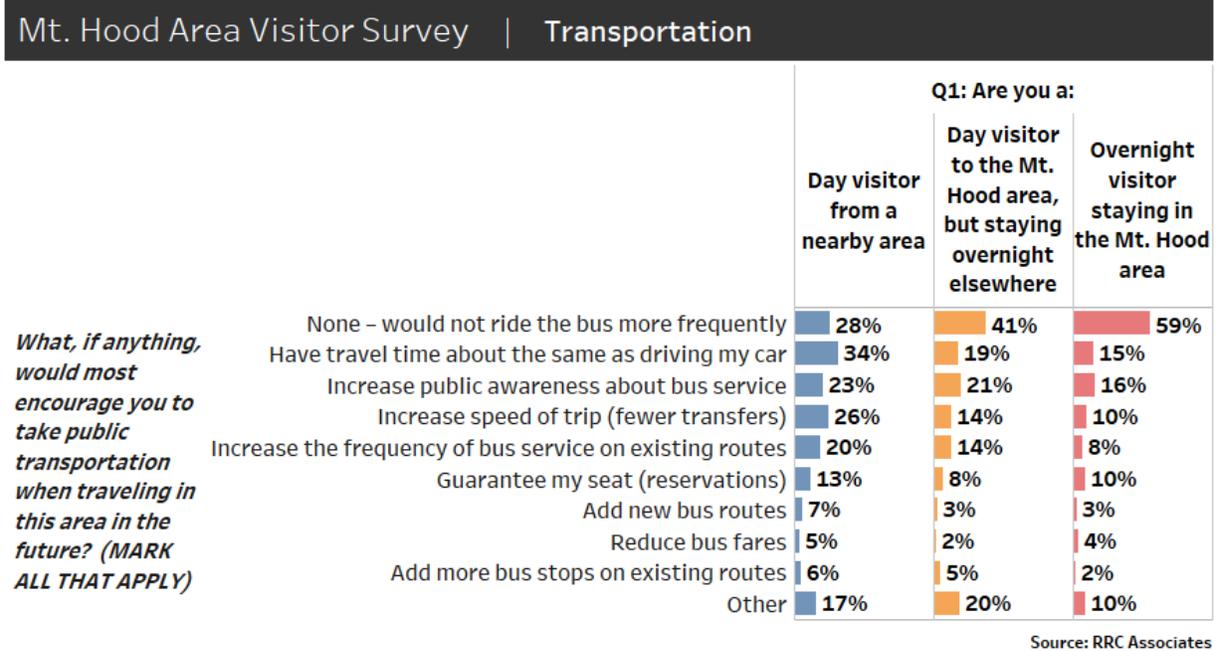
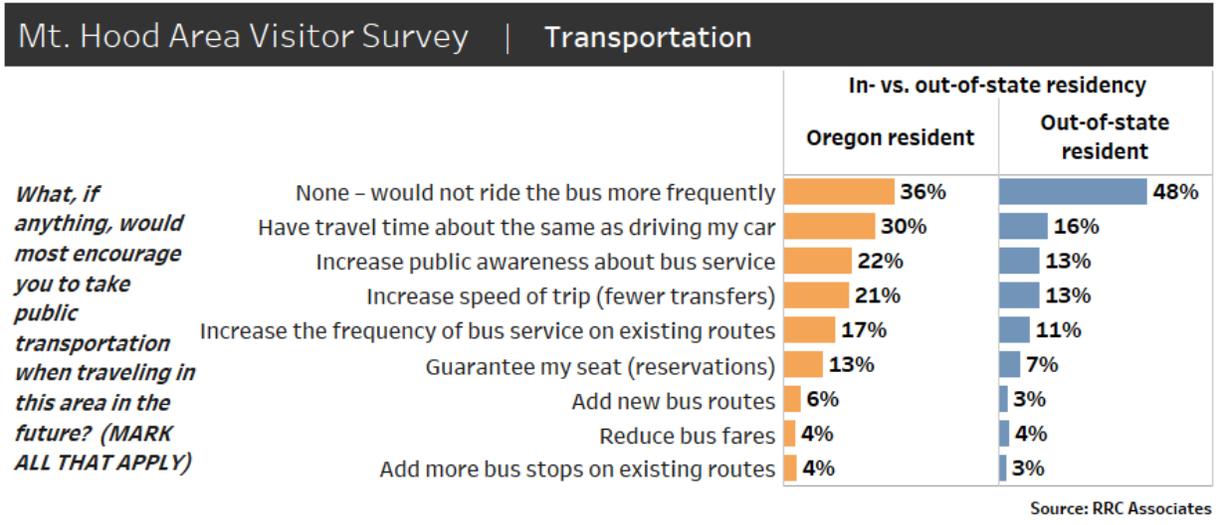


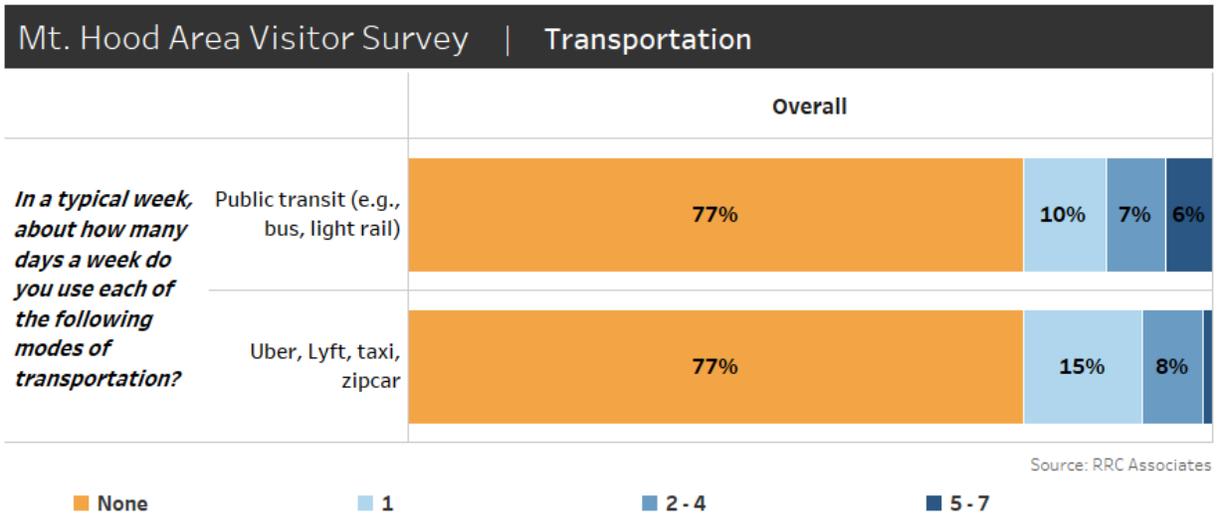
Figure 53



Frequency of Usage of Transportation Methods in a Typical Week

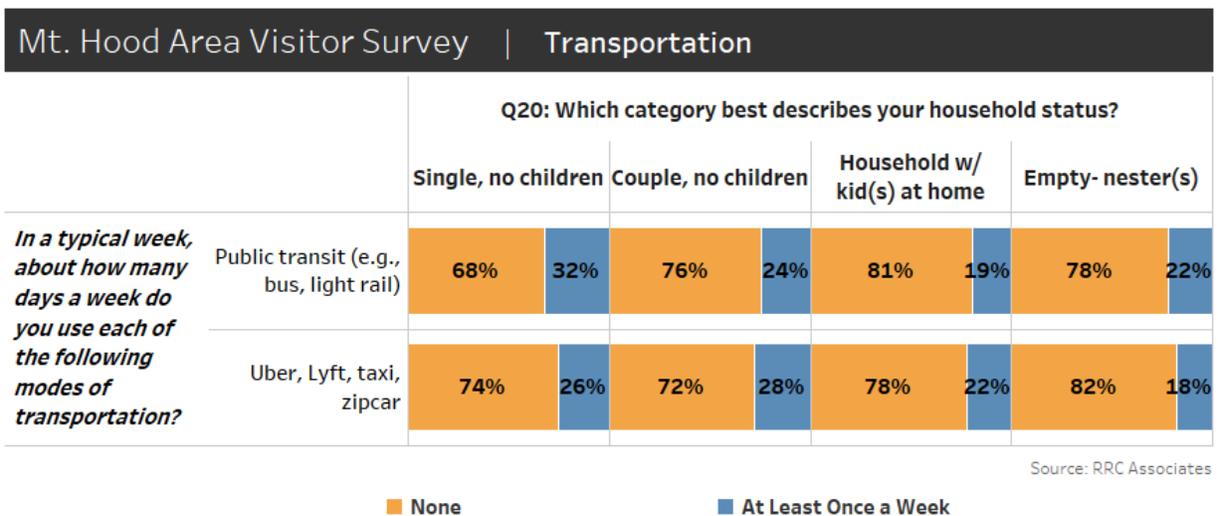
Nearly a quarter of respondents use public transit or rideshare at least once a week (23 percent each, respectively). Rideshare is most often used one day a week on average, while those who use public transit tend to use it more days in the week.

Figure 54



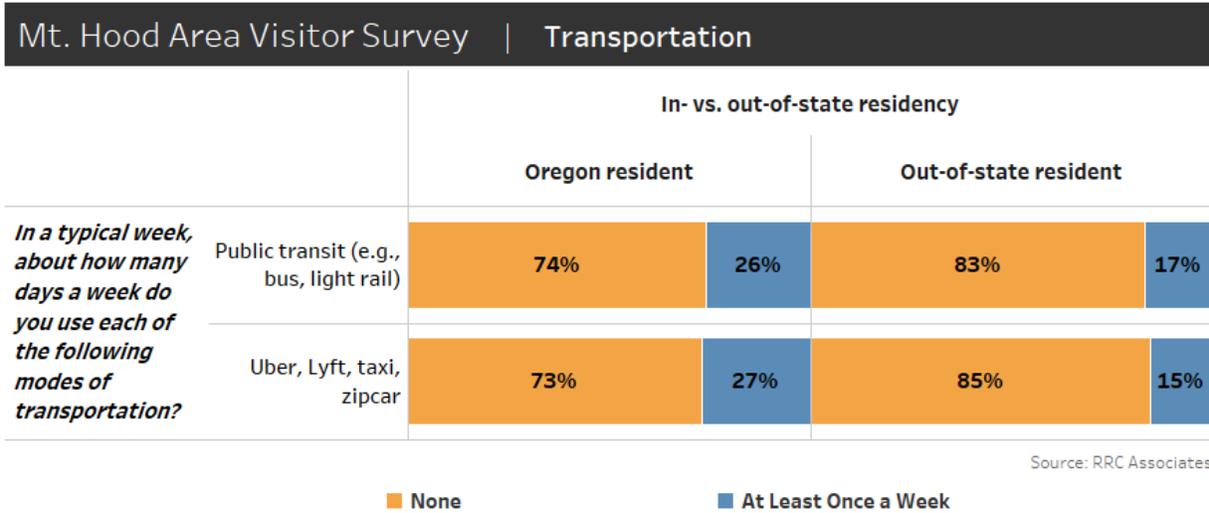
Singles without kids are the most likely to use public transit at least once in a typical week (32 percent), while couples without kids are the most frequent users of rideshare in a typical week (28 percent).

Figure 55



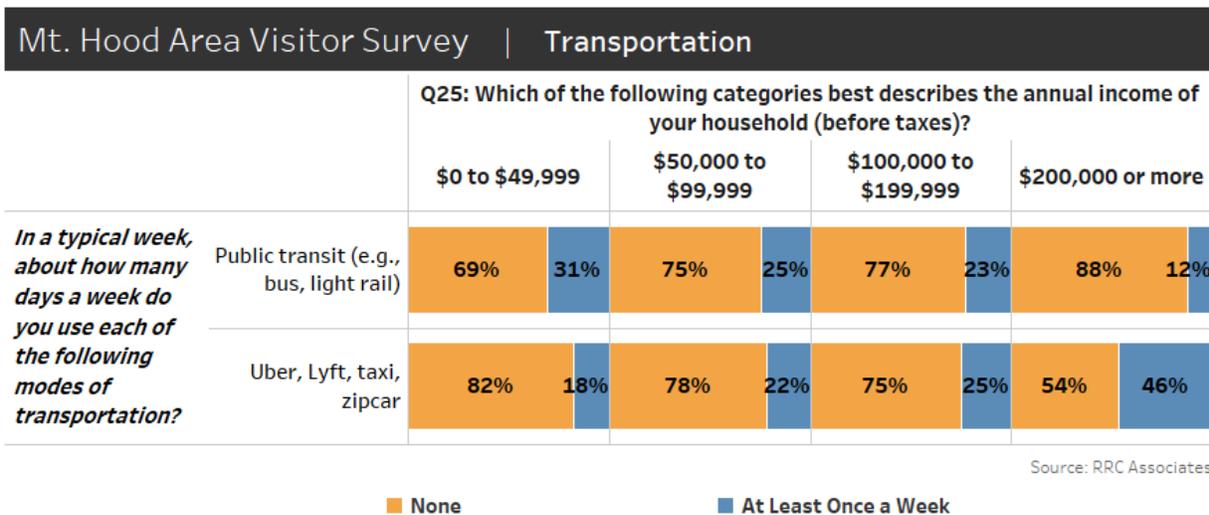
Oregon residents use each transportation mode more often in a typical week than out-of-state residents (26 to 27 percent vs. 15 to 17 percent).

Figure 56



Respondents in lower income brackets use public transit more often, while those in higher income brackets use rideshare more often.

Figure 57



Users of public transit and rideshare are notably more likely than non-users of being willing to use the bus more frequently in the future if certain factors were addressed. Both of these user groups would most like to see travel time be about the same as driving a car. Current public transit users were much more likely to want to see increased frequency of bus service on existing routes.

SUGGESTIONS / OPEN ENDED COMMENTS

At the end of the survey, respondents had an opportunity to provide any comments or suggestions about their experiences in or traveling to the Mt. Hood area. The full set of verbatim comments, provided under separate cover, should be read to understand the full breadth and depth of respondent opinions. While many took the opportunity to express positive sentiments, others made suggestions for improvement. Better signage, more food and beverage options, more parking locations, more lodging options and at a variety of price points, better communication/advertising, and traffic mitigation emerged as themes of areas to address in the future. A random sample of verbatim comments is provided below:

- *8:45 bus never showed*
- *Back roads not bike friendly*
- *Beautiful*
- *Bus from Hood River is nice*
- *Bus rates to all camping on designated times*
- *Diverse area attractive to use access easy*
- *Easy travel here*
- *Enforce chains on Timberline and US 26 to reduce wrecks and traffic*
- *Fix 26 east of Zig Zag!*
- *Great, relaxing*
- *I love you Mt. Hood*
- *I'm impressed with hiking trails well maintained nice you have rest stops too*
- *It's beautiful here, just love it!*
- *Keep doing what you do*
- *Like idea of shuttle*
- *Love the Mt. Hood area, would like to be able to purchase snow park passes, forest passes*
- *Meadows is getting too crowded. The highway often has tons of traffic.*
- *More food options at better prices*
- *More information for out of towners*
- *More parking would be nice*
- *More regulations to control numbers*
- *Poop bags for dogs*
- *Roadside signage is inadequate and misleading other than that wonderful area*
- *Season lockers at areas should be cheap to encourage public transit*
- *Too many people not carpooling, too many single drivers*
- *Universal park pass for all areas would be great idea not 5 or 6 separate passes*
- *We love camping this area. Usually do so twice a year.*
- *Would like to see that Sandy Ridge remain for mountain bikers and not be developed for other uses. There is a great bike culture here and would like it to remain so*