



**Neighborhood Business District
Access Survey
Intercept survey of
Seattle neighborhood visitors**

February 2012

Purpose:

To better understand visiting and travel behaviors in various neighborhood business districts in the City of Seattle

Objectives:

- 1) Gauge the general frequency and length of stay of each neighborhood's visitors
- 2) Investigate reasons for visiting each neighborhood business district
- 3) Understand how visitors travel to each business district and why they use their chosen modes of travel
- 4) Identify ways the City can sustain and improve visitation to its business districts
- 5) Quantify the demographic characteristics of travelers to each neighborhood business district

- A total of 1,447 interviews were completed in six Seattle neighborhood business districts (NBDs).
- Interviewing took place from September 29th to October 16th, 2011 at 2 to 4 specified intersections in each NBD at between 9am and 10pm, Thursday through Sunday.
- The questionnaire was a single page (front & back), letter-sized, self-administered handout. Two interviewers were on-site for each shift to distribute and collect surveys. They were also available to assist respondents with visual or physical impairments.
- To minimize selection bias, interviewers approached every 5th visitor passing their location to participate in the survey during normal and heavy traffic periods. For extremely slow periods, interviewers approached as many visitors as possible.
- To ensure that results reflect voluntary visitors to each neighborhood, people who were on their way to or on a break from work were screened out of the survey.
- The survey was printed in English. A Vietnamese version was offered for visitors in the Othello neighborhood and 3 were completed. Interviewers reported approximately 102 refusals due to general language barriers.

Interviews & Margin of Error by NBD

Neighborhood Business District	Number of interviews (n)	Margin of Error (+/-)
Admiral	201	6.9%
Ballard	307	5.6%
Capitol Hill	292	5.7%
Columbia City	205	6.8%
Fremont	228	6.5%
Othello	214	6.7%

Interviews & MoE by Residents & Non-residents



Neighborhood Business District	Residents		Non-Residents	
	<i>Number of interviews (n)</i>	<i>Margin of Error (+/-)</i>	<i>Number of interviews (n)</i>	<i>Margin of Error (+/-)</i>
Admiral	120	8.9%	80	11.0%
Ballard	128	8.7%	171	7.5%
Capitol Hill	138	8.3%	151	8.0%
Columbia City	73	11.5%	130	8.6%
Fremont	58	12.9%	159	7.8%
Othello	120	8.9%	89	10.4%

Resident vs. Non-Resident

- Admiral and Othello had the highest percentages of resident visitors.
- Capitol Hill was evenly divided.
- Ballard and Columbia City , and Fremont all had high percentages of non-resident visitors.

Resident Proximity

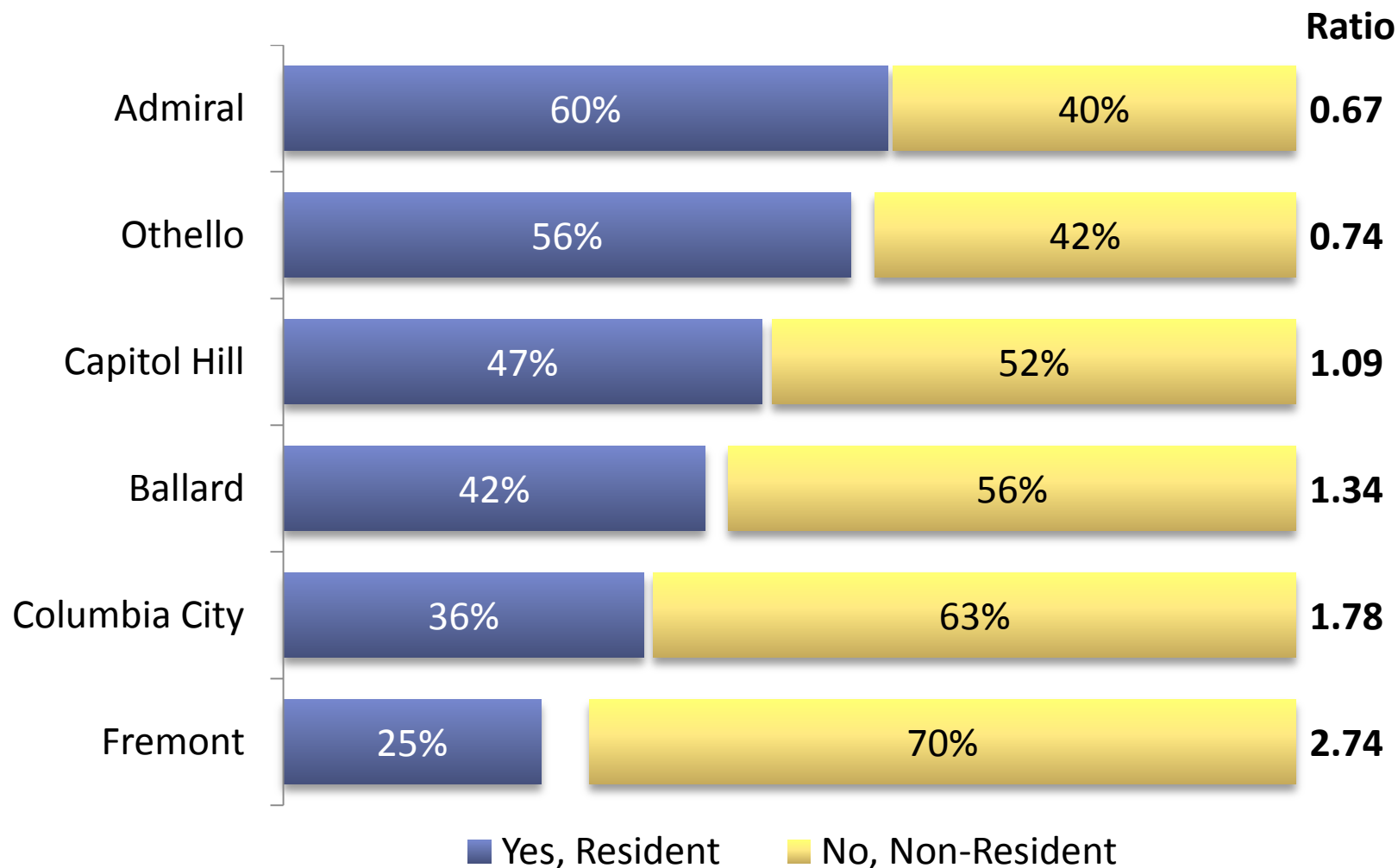
- A majority of resident visitors in Othello, Fremont, Columbia City and Admiral live within 5 blocks of their district cores.
- Capitol Hill is divided evenly between nearby and more distant residents.
- Ballard has more resident visitors who live 5+ blocks away than within 5 blocks of the district core.

Resident vs. Non-Resident Visitors



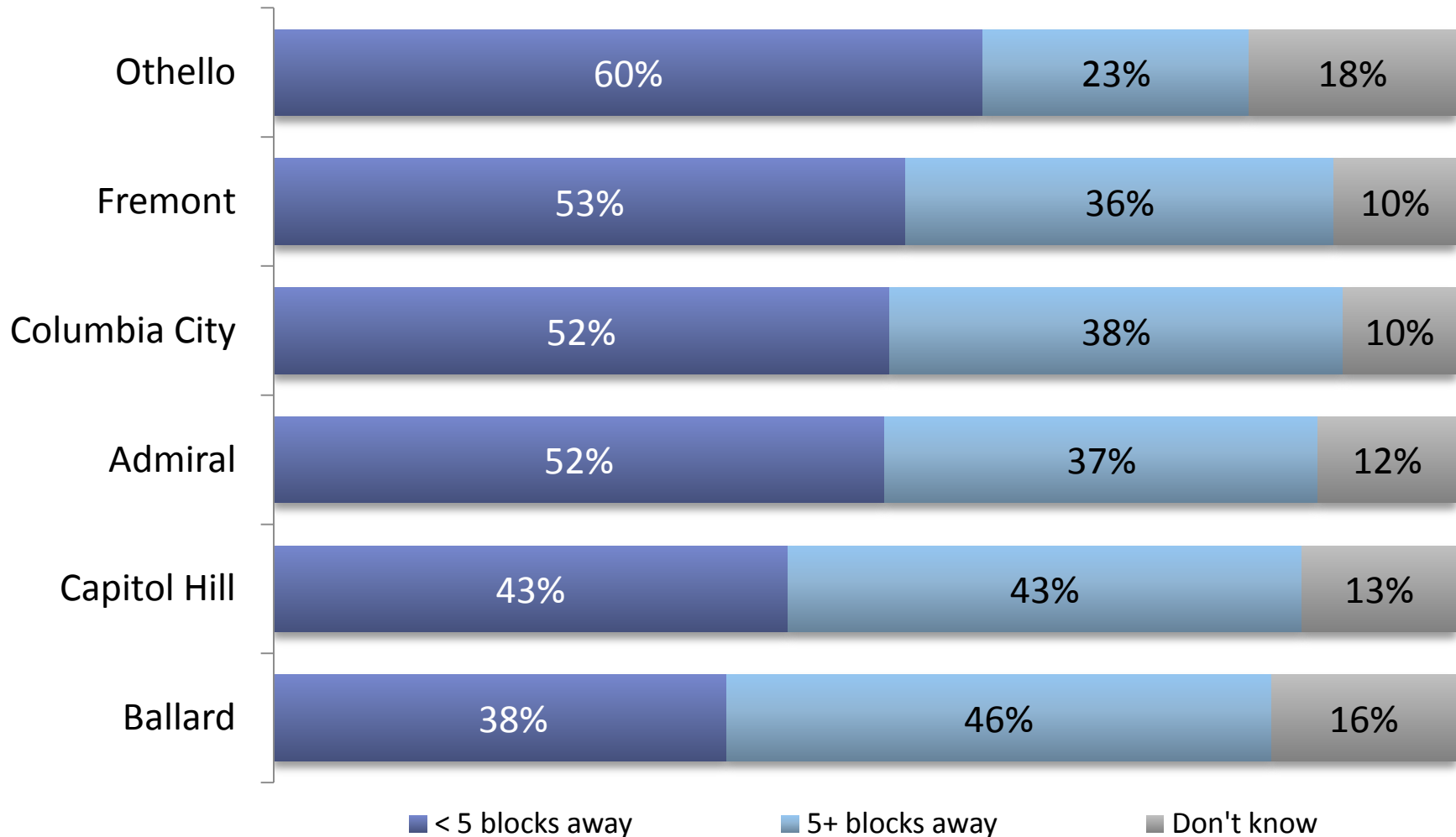
Resident & Non-Resident Visitors

Q16. Do you live in [Neighborhood Business District]?



Distance from Business District

Q16. [IF RESIDENT] How many blocks from here?



Profile of Visits



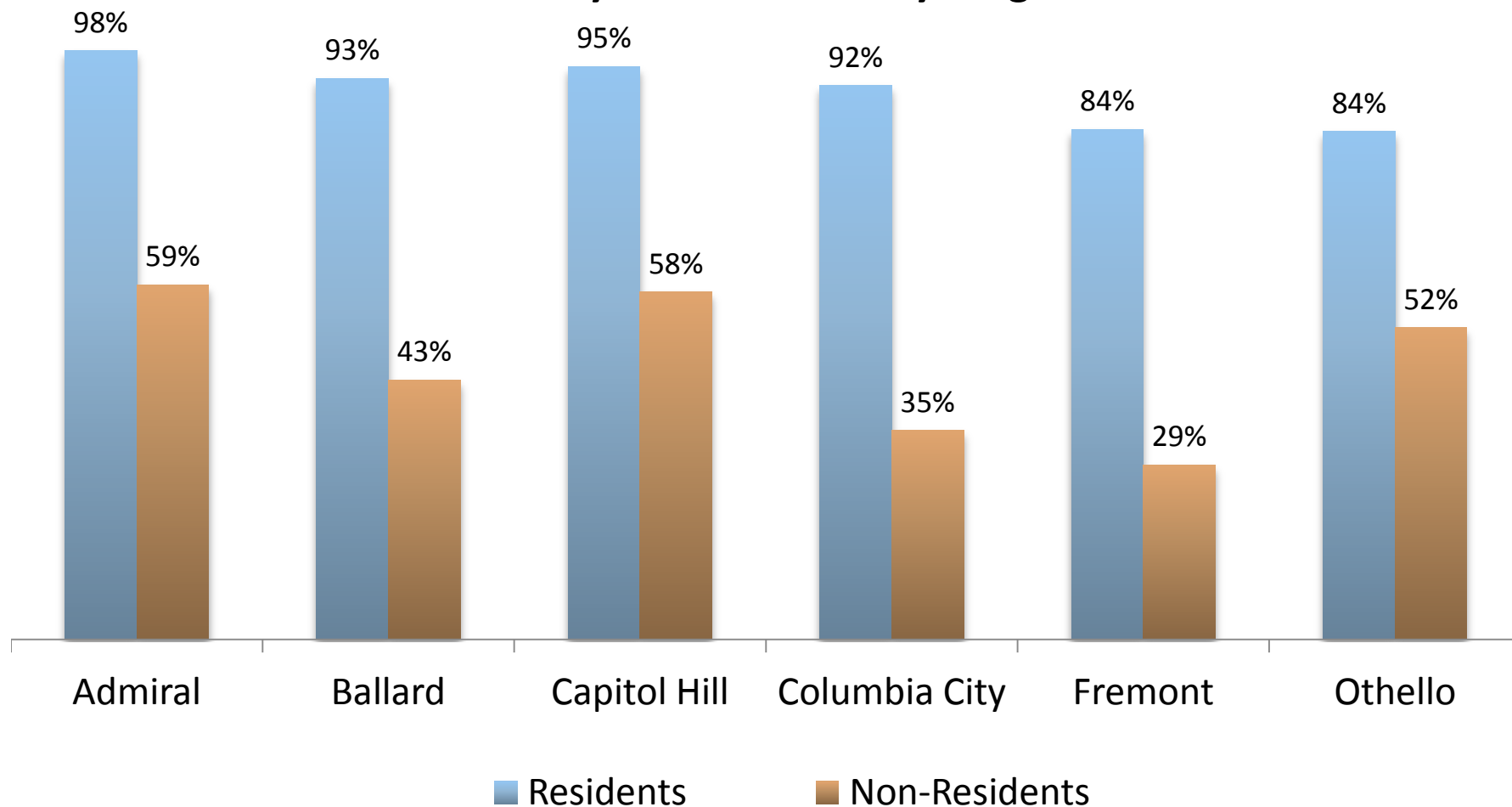
1) Gauge the general frequency and length of stay of each neighborhood's visitors

- Despite having a lower overall percentage of non-resident visitors, the non-resident visitors that do go to Admiral, Capitol Hill and Othello visit more regularly (once a week+) than non-resident visitors who go to Ballard, Columbia City, and Fremont.
- There is some seasonal variation among regular non-resident visitors, but it is not dramatic – the biggest drop off is in Fremont (9 points between Fall and Winter).
- Fremont has the highest percentage (34%) of visitors from outside the City limits.
- Capitol Hill (64%) has the highest percentage of extended (3+ hours) non-residents visits, followed by Fremont (54%) and Ballard (51%).
- Othello has a very high percentage (38%) of short (under 1 hour) visits by non-residents.

Regular Year-Round Visitors

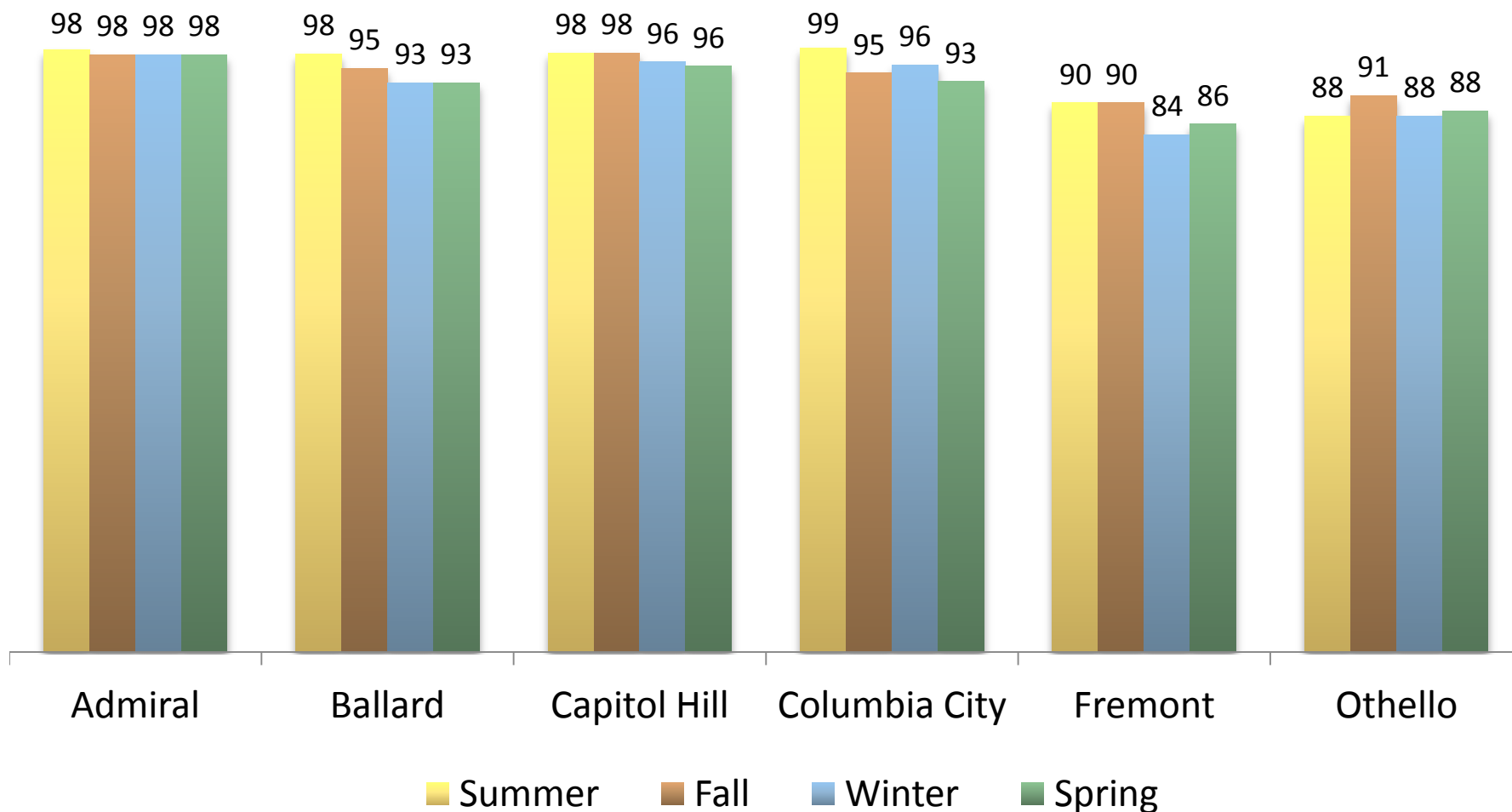
Q2. How often do you come to [Neighborhood Business District]?

% 'Visit weekly in all seasons' by Neighborhood



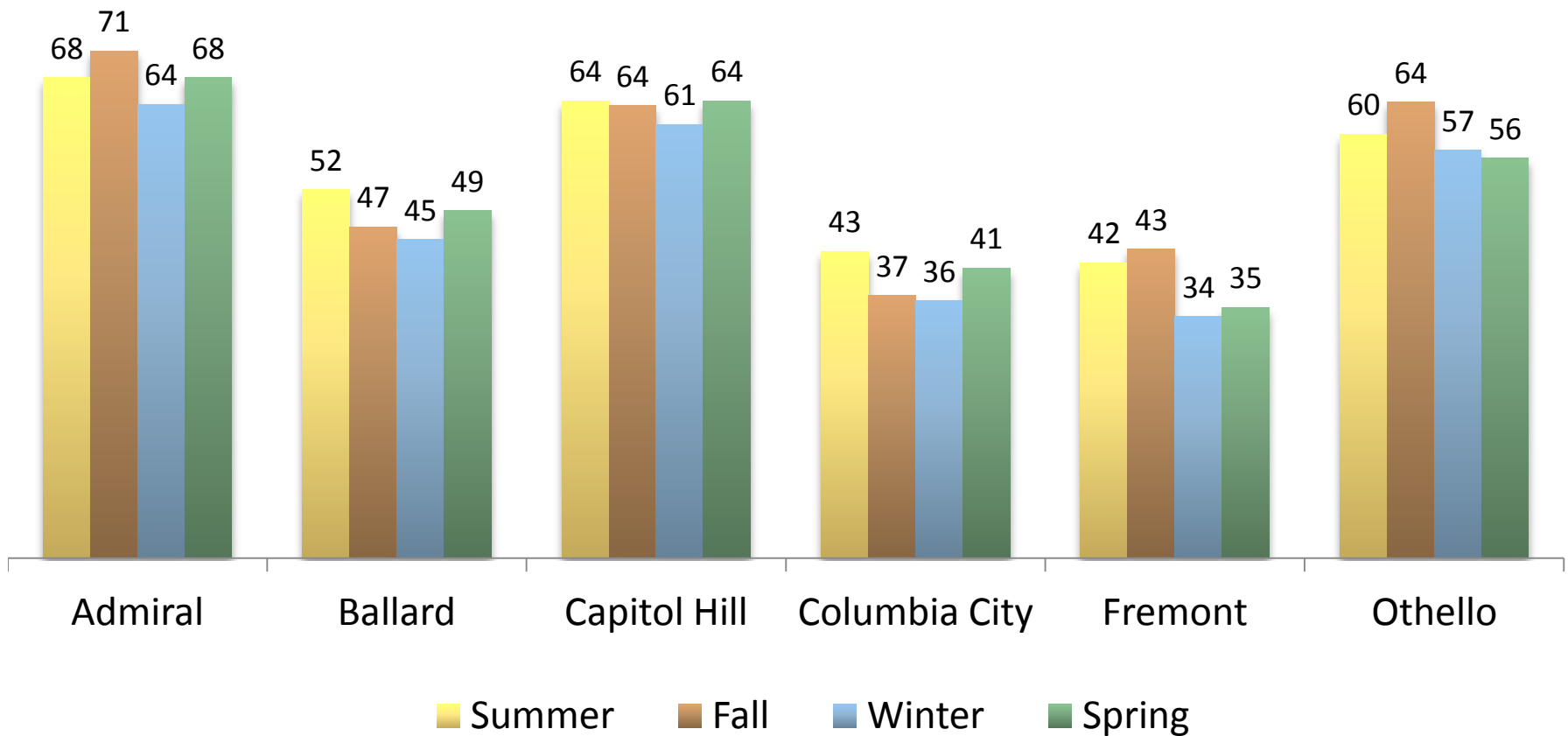
Seasonal Visitation – Residents

Q2. How often do you come to [NBD]?
(% 'Visit weekly' by season)



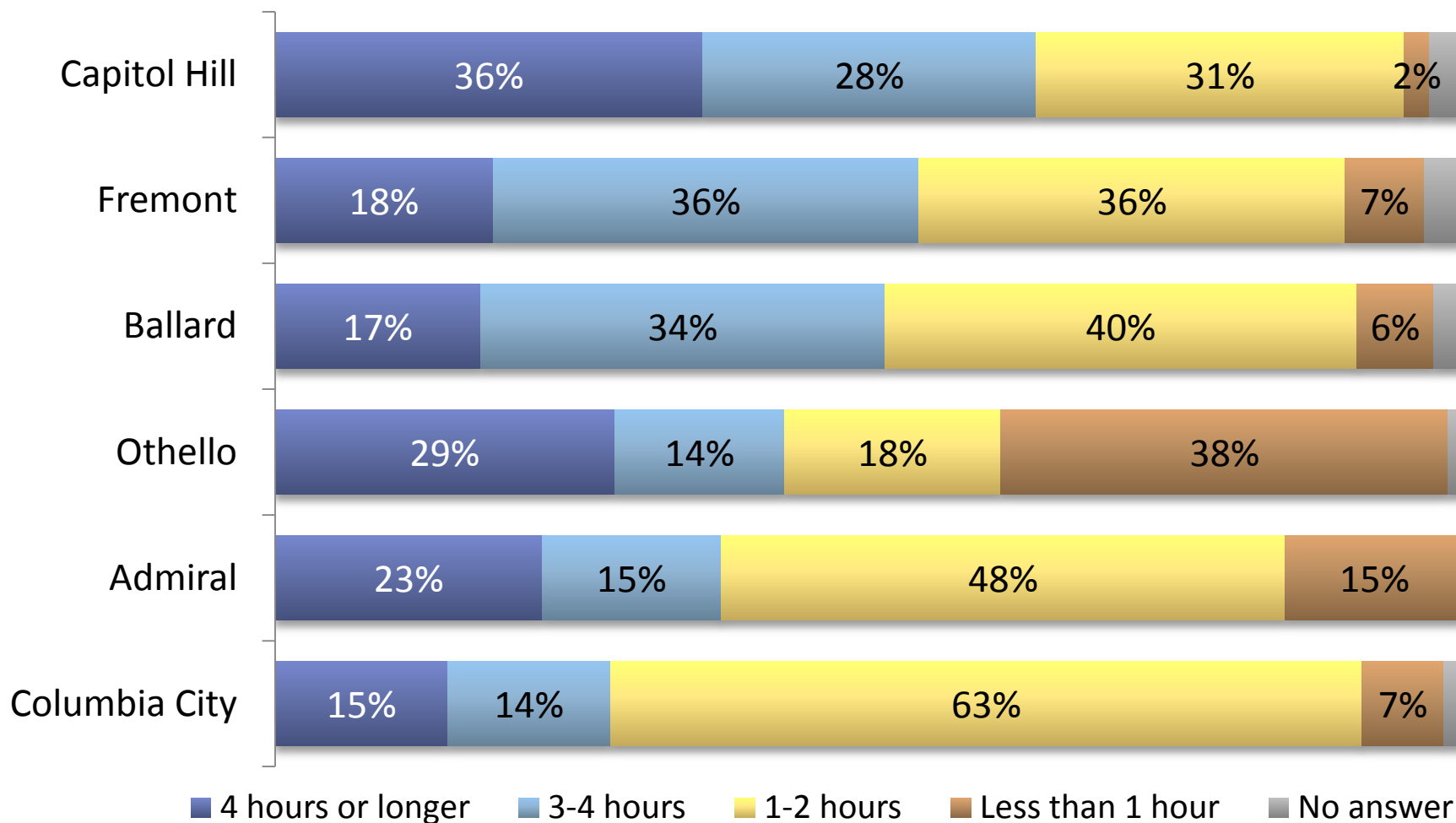
Q2. How often do you come to [NBD]?

% 'Visit weekly' by Neighborhood



Length of Typical Visit – Non-Residents

Q4. If you've been here before, how long is your **typical** visit to [NBD]?



2) Investigate reasons for visiting each neighborhood business district

- Among residents, choice activities (dining, drinks, walking around) make up a significant percentage of visits. Restaurants and dining are a top 3 draw in 5 of the 6 NBDs (all but Othello).
- Nearly all non-resident visits in Ballard, Fremont, Capitol Hill and Columbia City are choice visits. Leisure items like going for drinks/happy hour, retail (non-grocery) shopping and getting coffee/snacks are prominent drivers for non-residents visiting these neighborhoods.
- Even among non-residents, grocery shopping is the top reason for visiting Admiral and Othello. Obligatory activities like personal business/running errands are common in both NBDs while work-related activities are also a draw for many non-resident visitors in Othello.

Typical Reasons for Visiting – Residents

*Q6. Please rank up to three of the top reasons you typically visit [NBD].
(Percent of respondents mentioning each item are shown)*

Top Reasons by Neighborhood

Admiral residents	
Shopping (grocery)	88%
Restaurant/ Dining	33%
Shopping (non-grocery)	26%
Personal business/ Errands	24%
Walk around/ Sightsee/ Visit friends or family	20%
Socializing/ Drinks/ Happy hour	18%

Ballard residents	
Restaurant/ Dining	52%
Shopping (grocery)	38%
Farmer's Market	34%
Socializing/ Drinks/ Happy hour	30%
Coffee/ Snack	23%
Shopping (non-grocery)	23%
Personal business/ Errands	16%

Capitol Hill residents	
Shopping (grocery)	52%
Socializing/ Drinks/ Happy hour	36%
Restaurant/ Dining	32%
Coffee/ Snack	27%
Personal business/ Errands	20%
Shopping (non-grocery)	18%
Arts/ Theatre/ Music	18%

Columbia City residents	
Restaurant/ Dining	63%
Coffee/ Snack	40%
Socializing/ Drinks/ Happy hour	33%
Personal business/ Errands	25%
Farmer's Market	21%
Shopping (grocery)	19%
Shopping (non-grocery)	18%

Fremont residents	
Shopping (grocery)	57%
Restaurant/ Dining	40%
Socializing/ Drinks/ Happy hour	36%
Coffee/ Snack	28%
Shopping (non-grocery)	22%
Work/ Work-related	17%
Personal business/ Errands	16%

Othello residents	
Shopping (grocery)	64%
Personal business/ Errands	31%
Shopping (non-grocery)	30%
Walk around/ Sightsee/ Visit friends or family	25%
Coffee/ Snack	21%
Restaurant/ Dining	19%
Work/ Work-related	18%

Typical Reasons for Visiting – Non-Residents

*Q6. Please rank up to three of the top reasons you typically visit [NBD].
(Percent of respondents mentioning each item are shown)*

Top Reasons by Neighborhood

Admiral visitors	
Shopping (grocery)	56%
Restaurant/ Dining	39%
Personal business/ Errands	24%
Shopping (non-grocery)	23%
Walk around/ Sightsee/ Visit friends or family	23%
Socializing/ Drinks/ Happy hour	23%

Ballard visitors	
Restaurant/ Dining	54%
Socializing/ Drinks/ Happy hour	42%
Shopping (non-grocery)	32%
Farmer's Market	26%
Walk around/ Sightsee/ Visit friends or family	23%
Arts/ Theatre/ Music	19%

Capitol Hill visitors	
Socializing/ Drinks/ Happy hour	46%
Restaurant/ Dining	44%
Coffee/ Snack	30%
Shopping (non-grocery)	22%
Walk around/ Sightsee/ Visit friends or family	21%
Work/ Work-related	21%
Arts/ Theatre/ Music	18%

Columbia City visitors	
Restaurant/ Dining	70%
Coffee/ Snack	32%
Socializing/ Drinks/ Happy hour	25%
Farmer's Market	23%
Walk around/ Sightsee/ Visit friends or family	18%
Shopping (non-grocery)	16%

Fremont visitors	
Restaurant/ Dining	38%
Shopping (non-grocery)	30%
Socializing/ Drinks/ Happy hour	29%
Walk around/ Sightsee/ Visit friends or family	28%
Coffee/ Snack	19%

Othello visitors	
Shopping (grocery)	37%
Work/ Work-related	29%
Walk around/ Sightsee/ Visit friends or family	26%
Personal business/ Errands	24%
Shopping (non-grocery)	18%

Modes of Travel

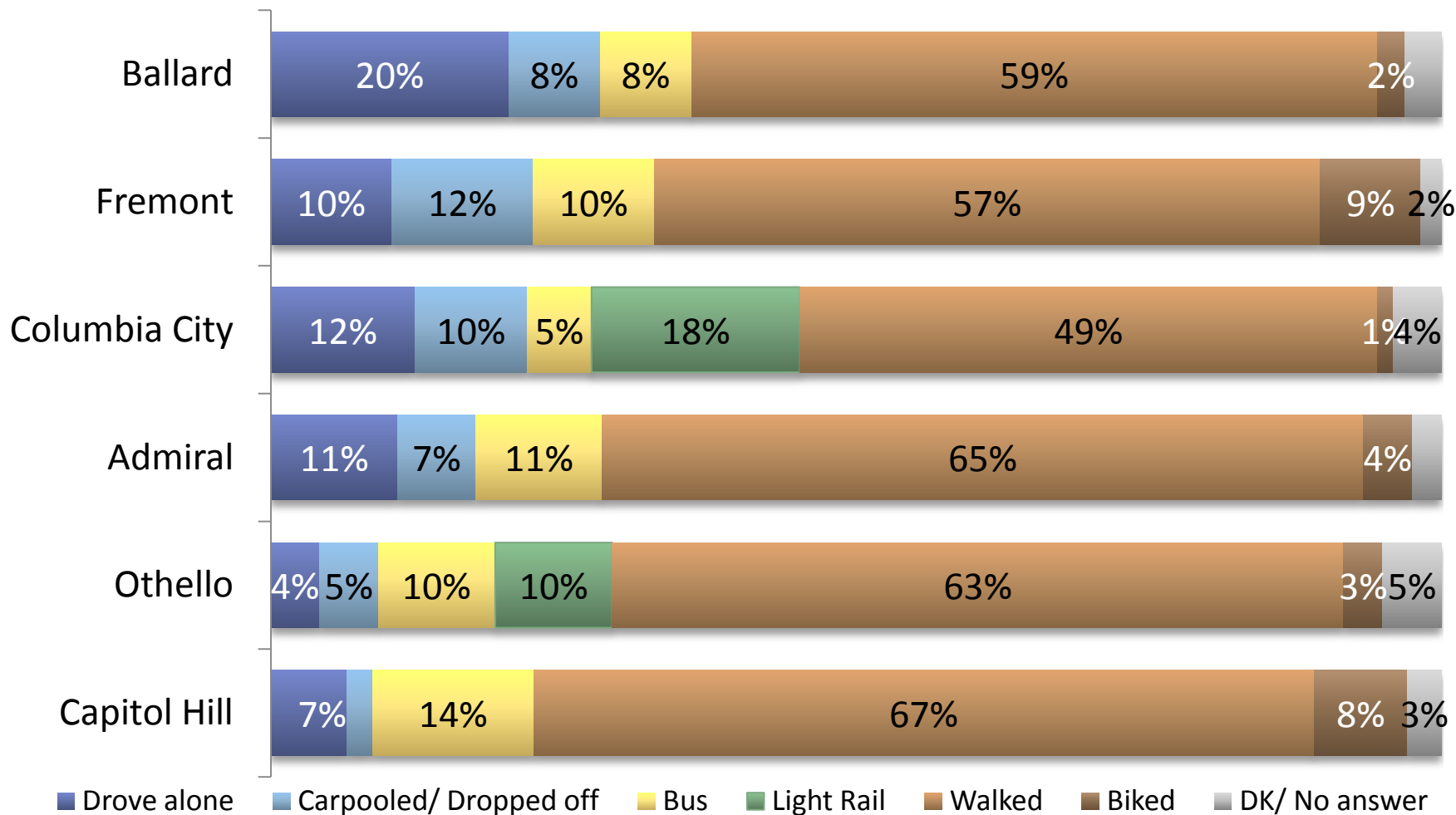


3) Understand how visitors travel to each business district and why they use their chosen modes of travel

- Most residents (61%+) either walk or take transit to get to their NDB. Ballard has the highest percentage of drivers at 25%. Few residents in Othello (9%) and Capitol Hill (4%) drive to those NBDs.
- A majority of non-residents visiting Ballard (64%), Columbia City (60%) and Admiral (54%) travel by car. Othello (52%) and Capitol Hill (46%) have high percentages of people who are not driving to get there. Almost half (43%) of non-residents get to Othello by either bus or Light Rail.
- Visitors arriving by car mainly choose driving out of convenience while for non-drivers, there is a mix of convenience and necessity.
- Most visitors who take cars park on-street in 5 of the 6 NBDs - Ballard (79%), Columbia City (76%), Fremont (71%), Capitol Hill (68%) and Admiral (67%). In Othello, more visitors who take cars park off-street (44%) than on-street (32%).

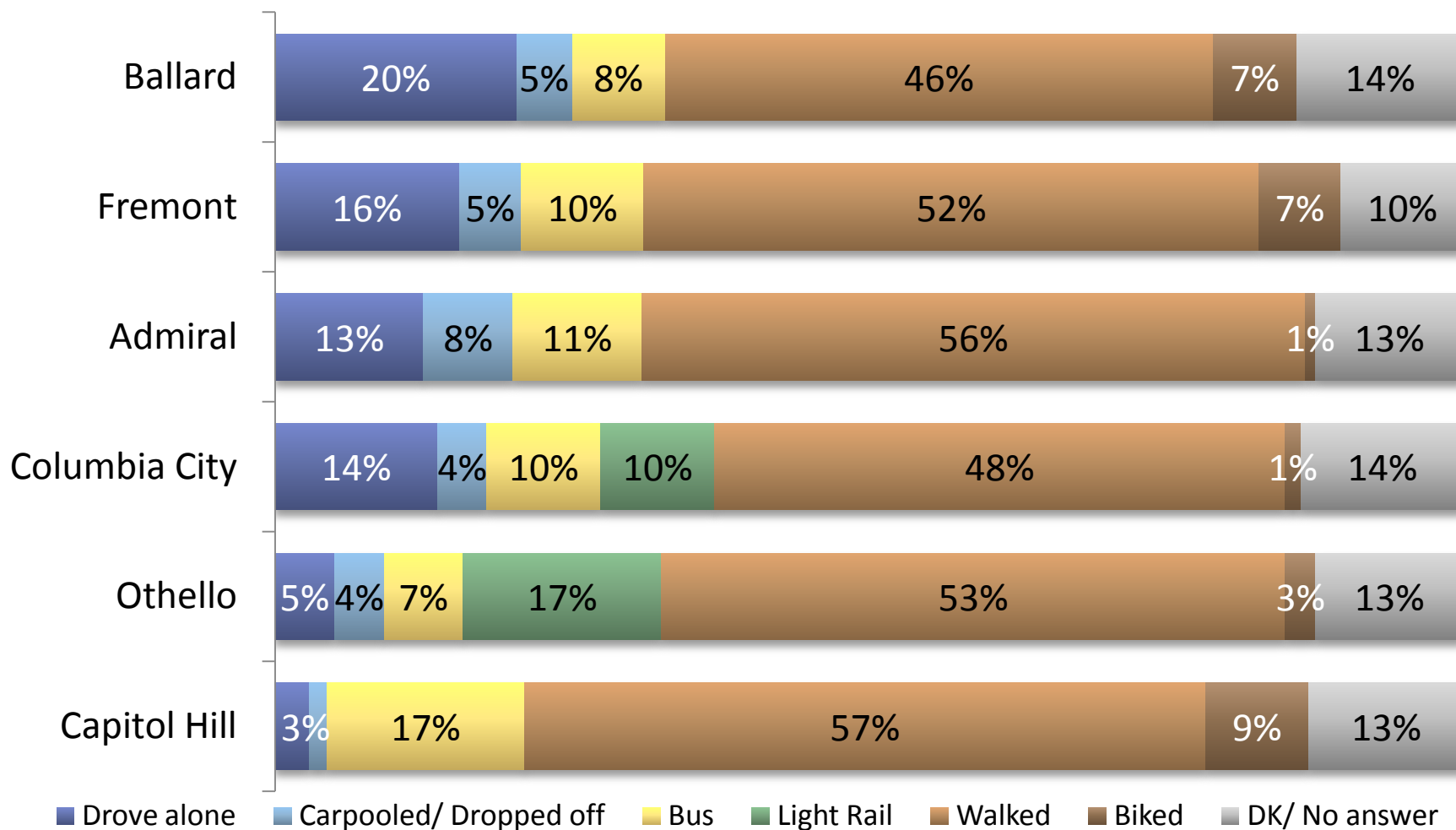
Today's Mode of Travel – Residents

Q8. How did you travel to [NBD] **today**?



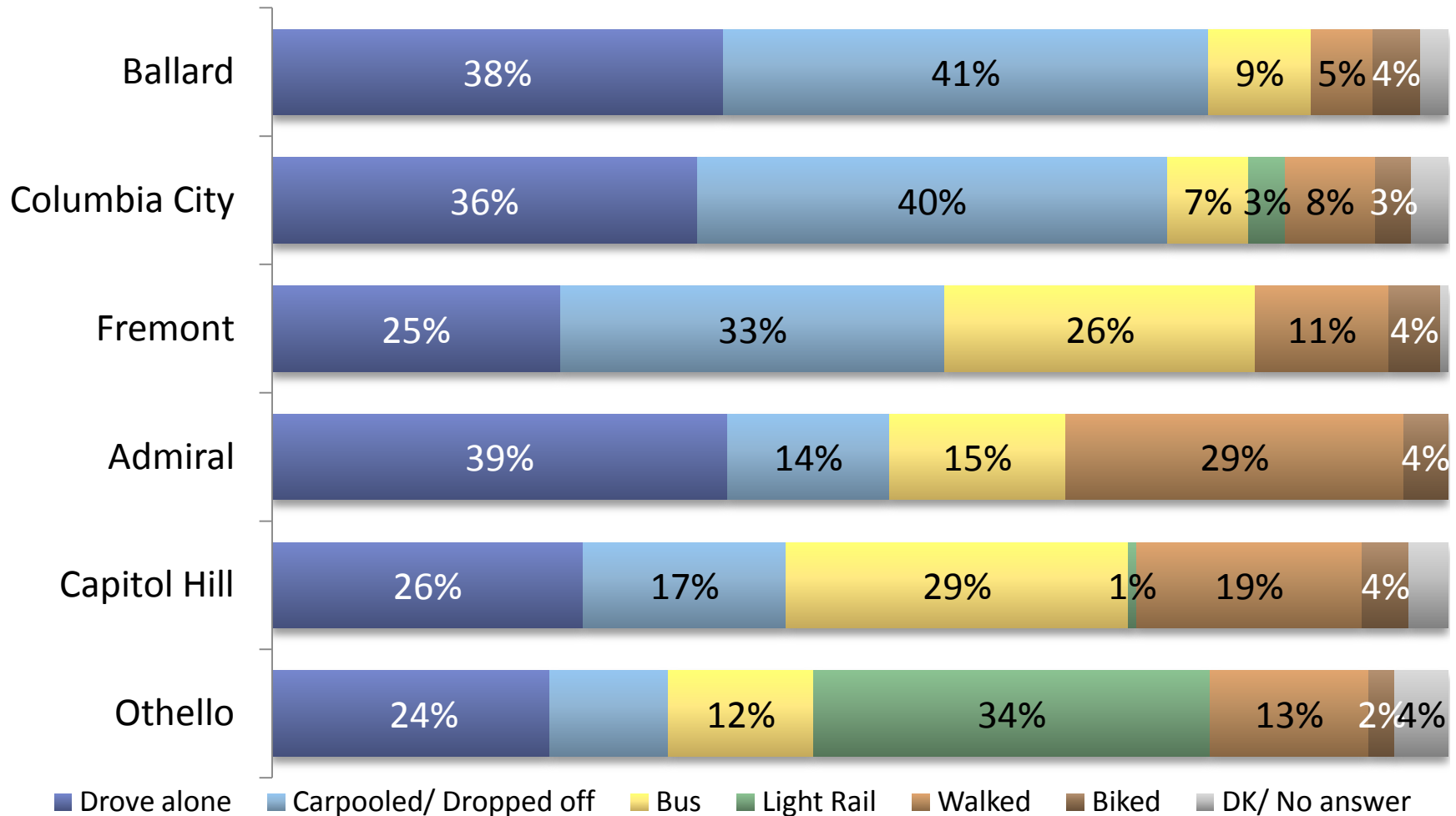
Typical Mode of Travel – Residents

Q11. How do you **typically** travel to [NBD]?



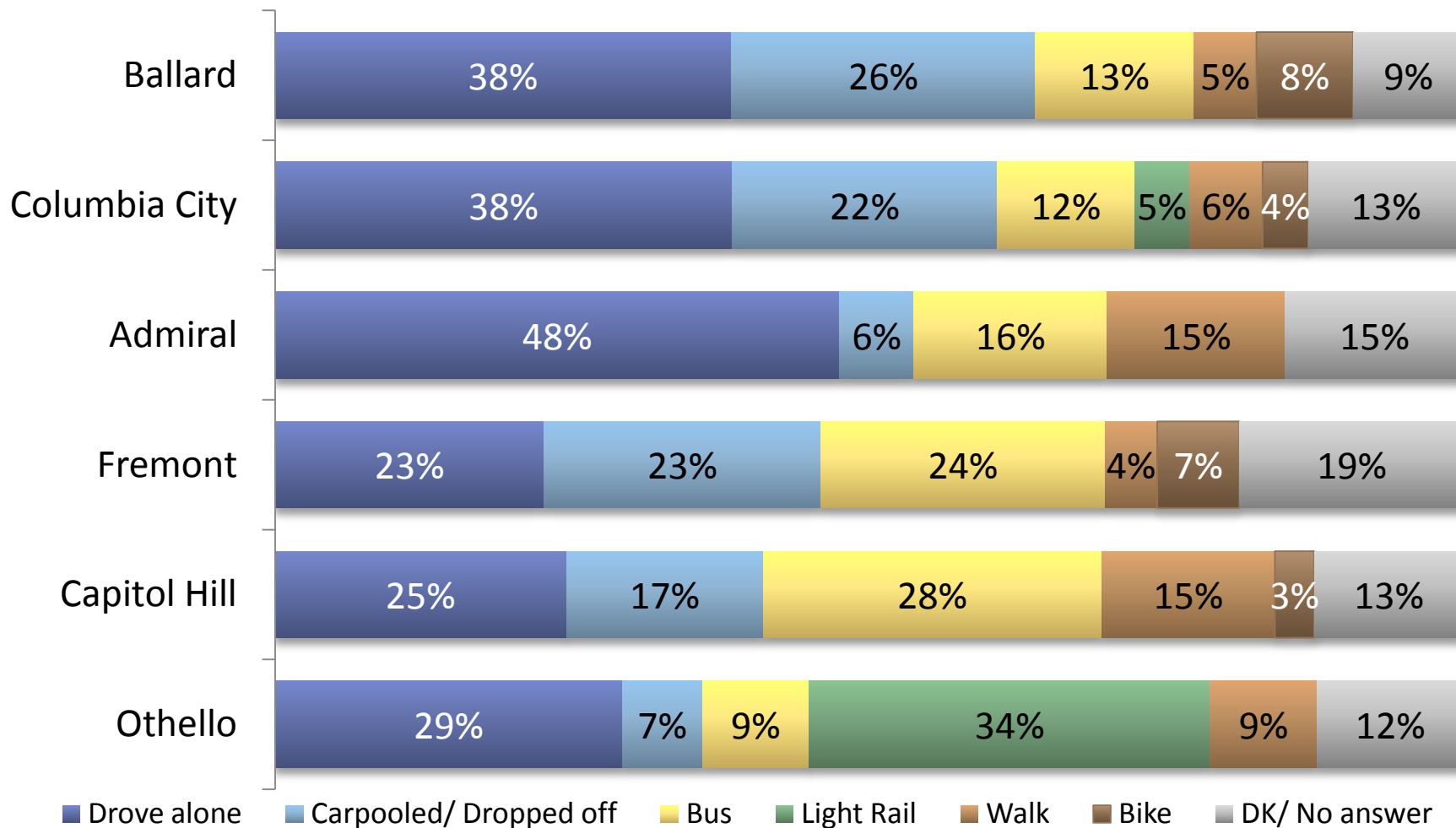
Today's Mode of Travel – Non-Residents

Q8. How did you travel to [NBD] **today**?



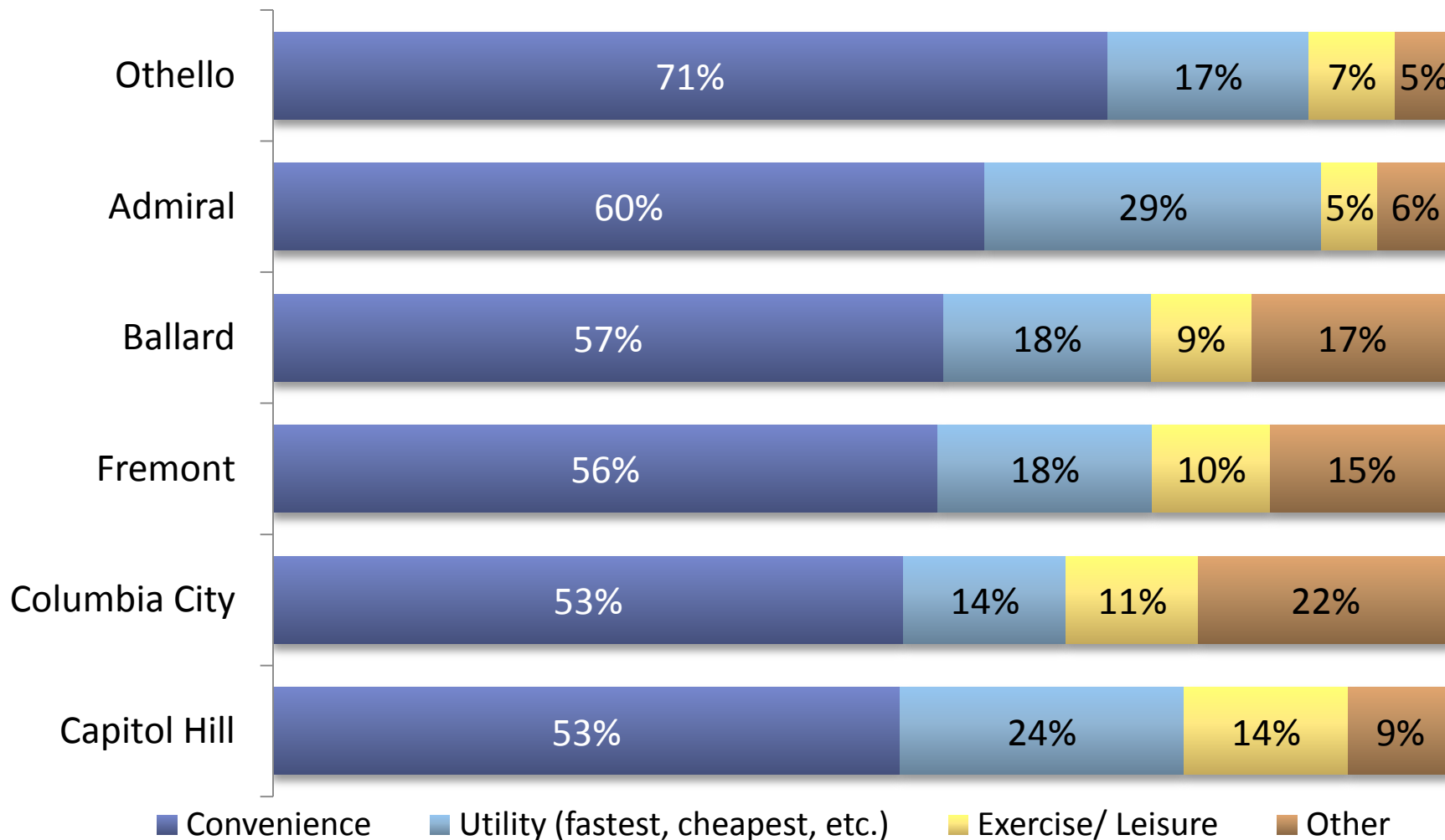
Typical Mode of Travel – Non-residents

Q11. How do you **typically** travel to [NBD]?



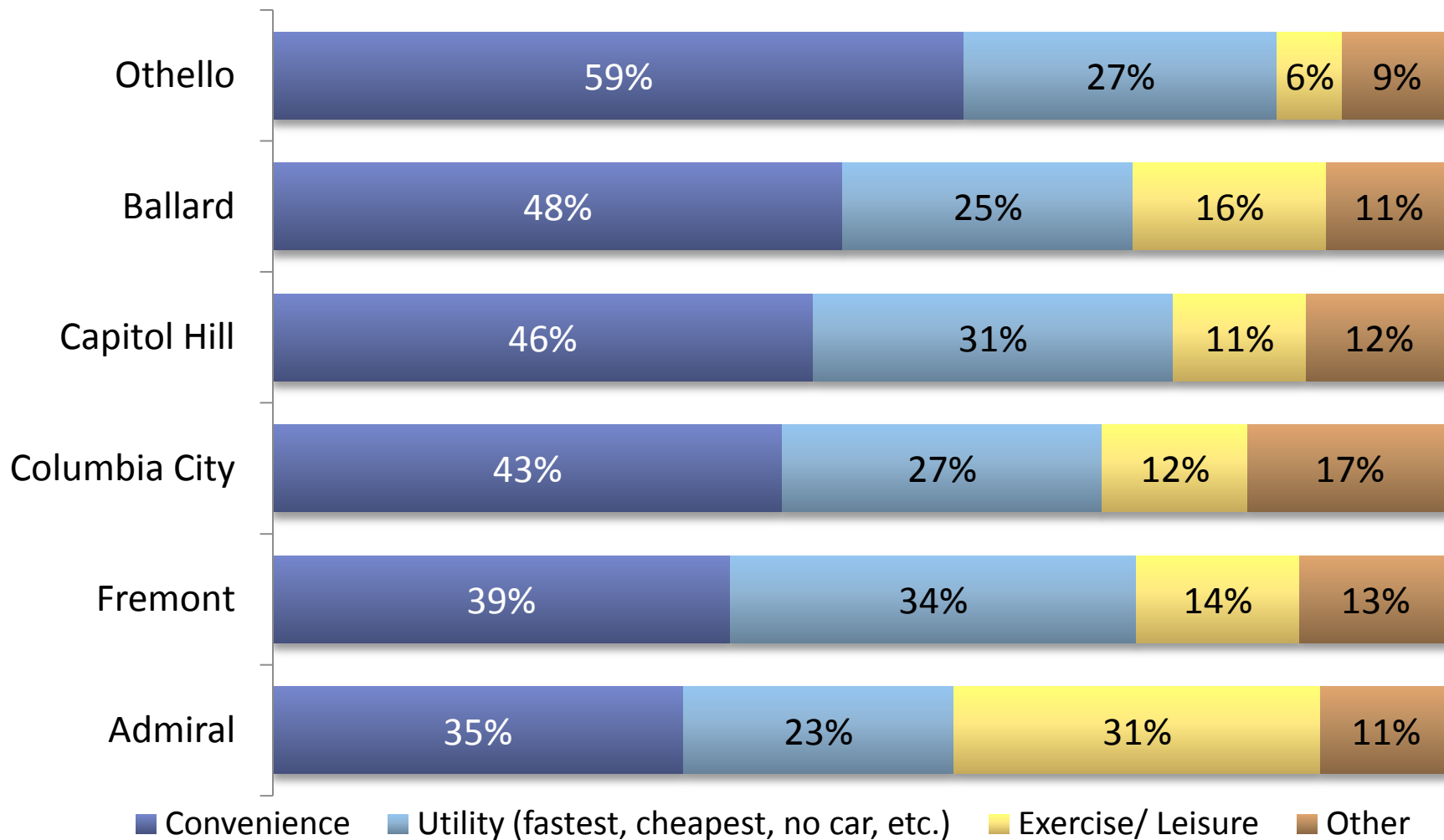
Reason for Choosing Mode – Drove/Carpooled

Q9. What was the reason you chose to get to [NBD] using the answer you gave in Q8?



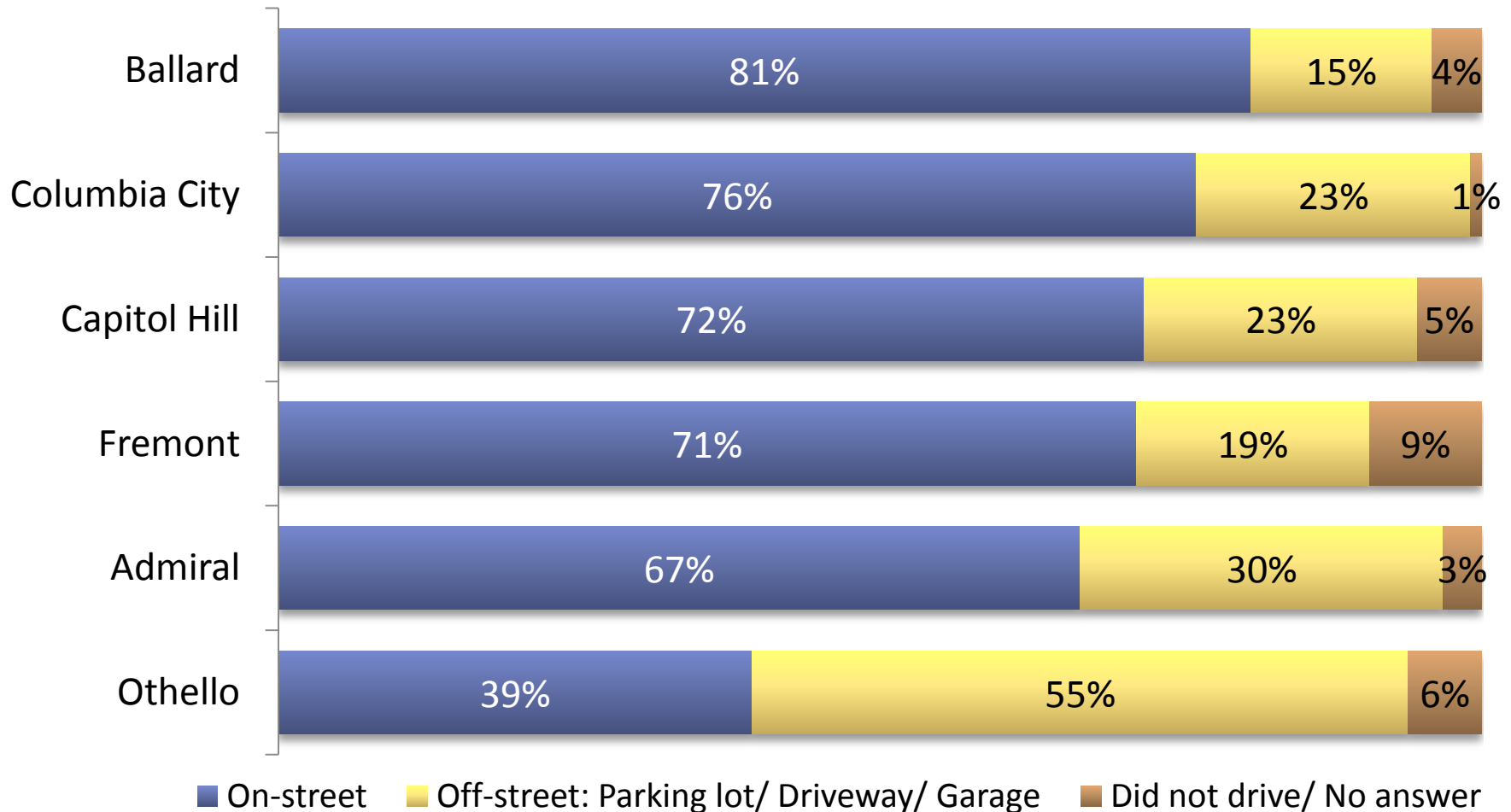
Reason for Choosing Mode – Transit/Biked/Walked

Q9. What was the reason you chose to get to [NBD] using the answer you gave in Q8?



Q10. If you drove here today, did you park on street or off street?

Visitors who drove or carpoled



Improving Visitation



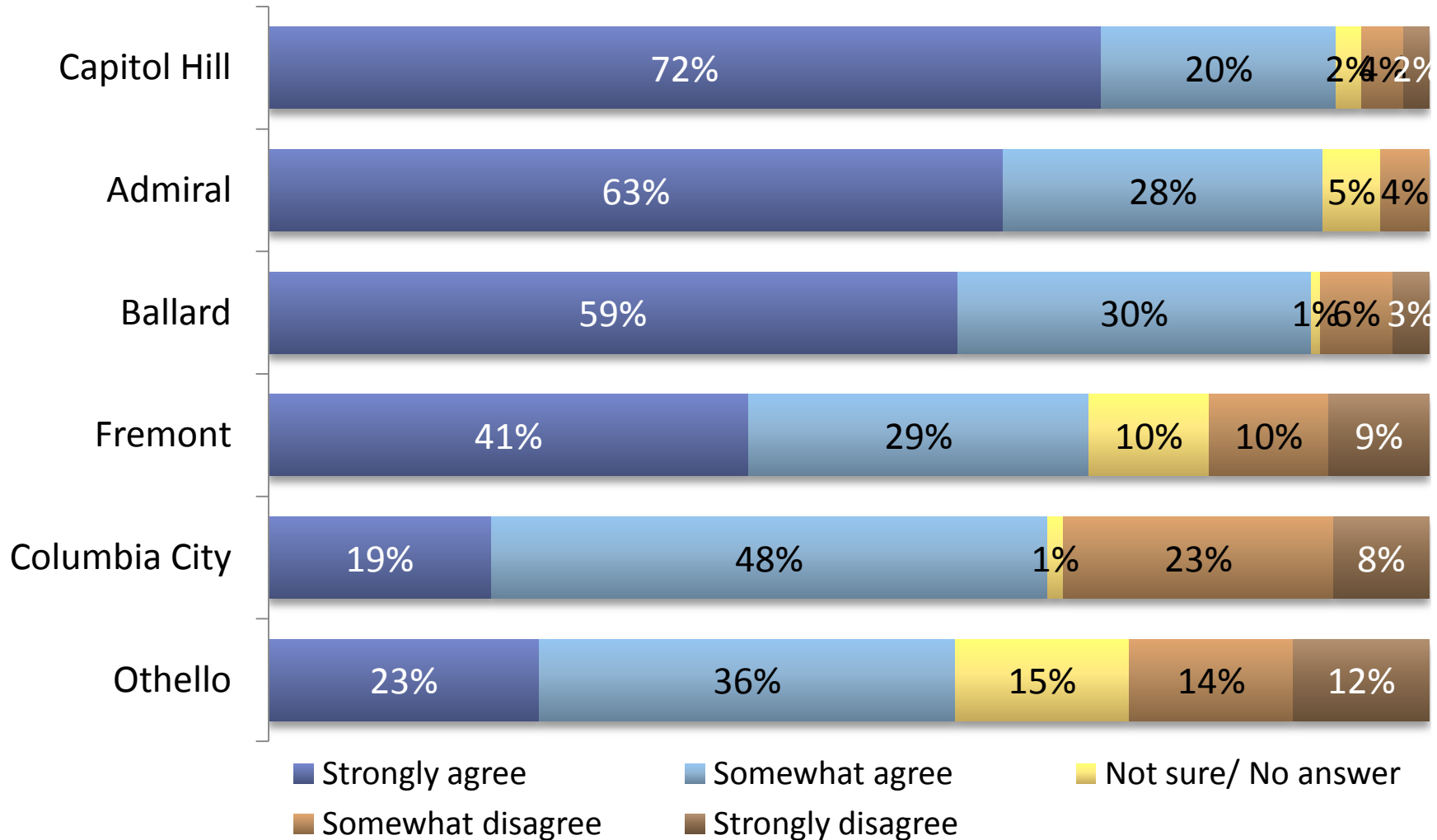
4) *Identify ways the City can sustain and improve visitation to its business districts*

- A majority of residents in all 6 neighborhoods agree that their NBD is their “primary neighborhood for shopping,” but the intensity (“strongly agree”) is significantly higher in Capitol Hill (72%), Admiral (63%), Ballard (59%) and Fremont (41%) than it is in Othello (23%) and Columbia City (19%).
- Not surprisingly, non-residents are less likely to agree that the NBD they are visiting is their “primary neighborhood for shopping.” Capitol Hill (42% agree) and Admiral (38%) are the most likely to attract regular non-resident shoppers, while Fremont is the least likely (16%).
- Convenience/proximity is the top reason for choosing a particular NBD. The grocery stores have a strong pull in Admiral (14%) as does the mix of unique shops in Fremont (13%) and Capitol Hill (10%).
- Lack of convenience/proximity is also the top reason for not choosing a particular NBD. However, there are also significant mentions of lack of stores/variety in Columbia City (15%), Othello (15%), Admiral (10%) and Fremont (10%).
- Visitors to Admiral are looking for a wider variety of restaurants. In Othello, it’s variety across the board – shops, restaurants, services and activities. Improved transit access is the top mention in Ballard. In Columbia City, visitors mention a cinema and grocery/Trader Joes. Capitol Hill is looking for smaller/better variety shops and transit. Fremont visitors are looking for more grocery options and a Mexican restaurant.

Primary Neighborhood for Shopping? – Residents

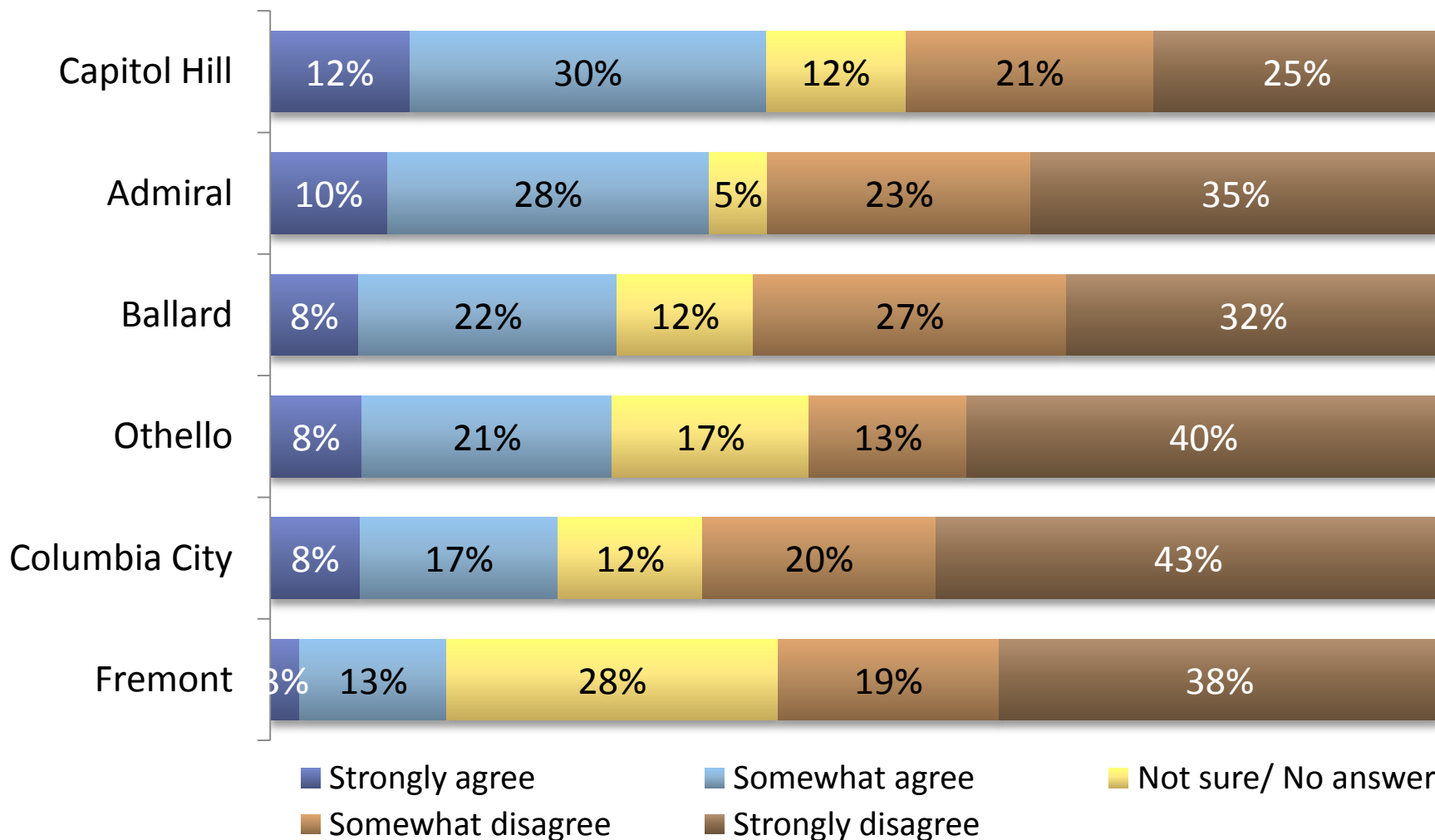


Q12. '[NBD] is my primary neighborhood for shopping,' Do you...



Primary Neighborhood for Shopping? – Non-residents

Q12. '[NBD] is my primary neighborhood for shopping,' Do you...



Top Reasons for Agreement

Q13. What are the reasons [you **Agree** that...] '[NBD] is my primary neighborhood for shopping'")

Top Reasons for Choosing Neighborhood

Admiral (n=139)	
I live here / nearby / Convenient	57%
Grocery store / Farmer's Market	14%
Large variety of stores / Unique shops	2%

Ballard (n=169)	
I live here / nearby / Convenient	57%
Grocery store / Farmer's Market	7%
Large variety of stores / Unique shops	7%
Atmosphere / Fun	2%

Capitol Hill (n=191)	
I live here / nearby / Convenient	55%
Large variety of stores / Unique shops	10%
Atmosphere / Fun	5%
Grocery store / Farmer's Market	2%

Columbia City (n=82)	
I live here / nearby / Convenient	40%
Grocery store / Farmer's Market	6%
Large variety of stores / Unique shops	5%
Atmosphere / Fun	5%
I go to [specific store name] or type of store	4%

Fremont (n=70)	
I live here / nearby / Convenient	60%
Large variety of stores / Unique shops	13%

Othello (n=99)	
I live here / nearby / Convenient	52%
Grocery store / Farmer's Market	9%
Large variety of stores / Unique shops	8%
Atmosphere / Fun	3%

Top Reasons for Disagreement

Q13. What are the reasons [you **Disagree** that...] "[NBD] is my primary neighborhood for shopping"

Top Reasons for Not Choosing Neighborhood

Admiral (n=52)	
I live elsewhere / Too far away/ Inconvenient	54%
Not enough stores / Lack of variety	10%
Grocery store / Farmer's Market	8%
I prefer to shop downtown	4%

Ballard visitors (n=115)	
I live elsewhere / Too far away/ Inconvenient	55%
Prefer to shop elsewhere/ Not primary	8%
It's too expensive to shop here	6%

Capitol Hill (n=80)	
I live elsewhere / Too far away/ Inconvenient	40%
Prefer to shop elsewhere/ Not primary	9%
It's too expensive to shop here	9%
Not enough parking	8%
Grocery store / Farmer's Market	4%

Columbia City (n=105)	
I live elsewhere / Too far away/ Inconvenient	41%
Not enough stores / Lack of variety	15%
Lack of Grocery	10%
Prefer to shop elsewhere/ Not primary	5%

Fremont (n=107)	
I live elsewhere / Too far away/ Inconvenient	58%
Not enough stores / Lack of variety	10%
Prefer to shop elsewhere/ Not primary	6%

Othello (n=81)	
I live elsewhere / Too far away/ Inconvenient	31%
Not enough stores / Lack of variety	15%
Prefer to shop elsewhere/ Not primary	9%

Top Improvement Suggestions

Q14. What, if anything, would you like to see in [NBD]? (Number of mentions shown)

Admiral (n=201)	
More/ better variety restaurants	10
Apparel	10
Mexican Restaurants / Tex-Mex / Latino	9
More Chain Restaurants	8
Trader Joe's	7
Skate Park	7

Othello (n=214)	
More/ better variety restaurants	22
More/ better variety shops	18
More/ better variety activities	8
Fast Food Restaurants	6
More/ better variety services	6
Parks / Playgrounds	6
Apparel	6
Sporting Goods / Sports	6

Ballard (n=307)	
Bus access / Increased public transit	23
More/ better variety shops	11
More/ better variety restaurants	10
Music / Concerts / Clubs / Dance	9
Car Parking	9
Bowling	8

Fremont (n=228)	
Grocery	15
Mexican Restaurants / Tex-Mex / Latino	13
Music / Concerts / Clubs / Dance	8
Gym / YMCA / Yoga / Swimming	7
Pets	7
Drugstore / Pharmacy	7

Capitol Hill (n=292)	
More Independent or Small Business / Fewer chains	20
Bus access / Increased public transit	16
More/ better variety shops	11
More/ better variety restaurants	11
Music / Concerts / Clubs / Dance	11
Cheaper / Low-cost / Affordable Goods & Services	10

Columbia City (n=205)	
Cinema / Theatre	33
Grocery	29
More/ better variety restaurants	12
More/ better variety shops	11
Trader Joe's	10

Demographics



5) *Quantify the demographic characteristics of travelers to each NBD*

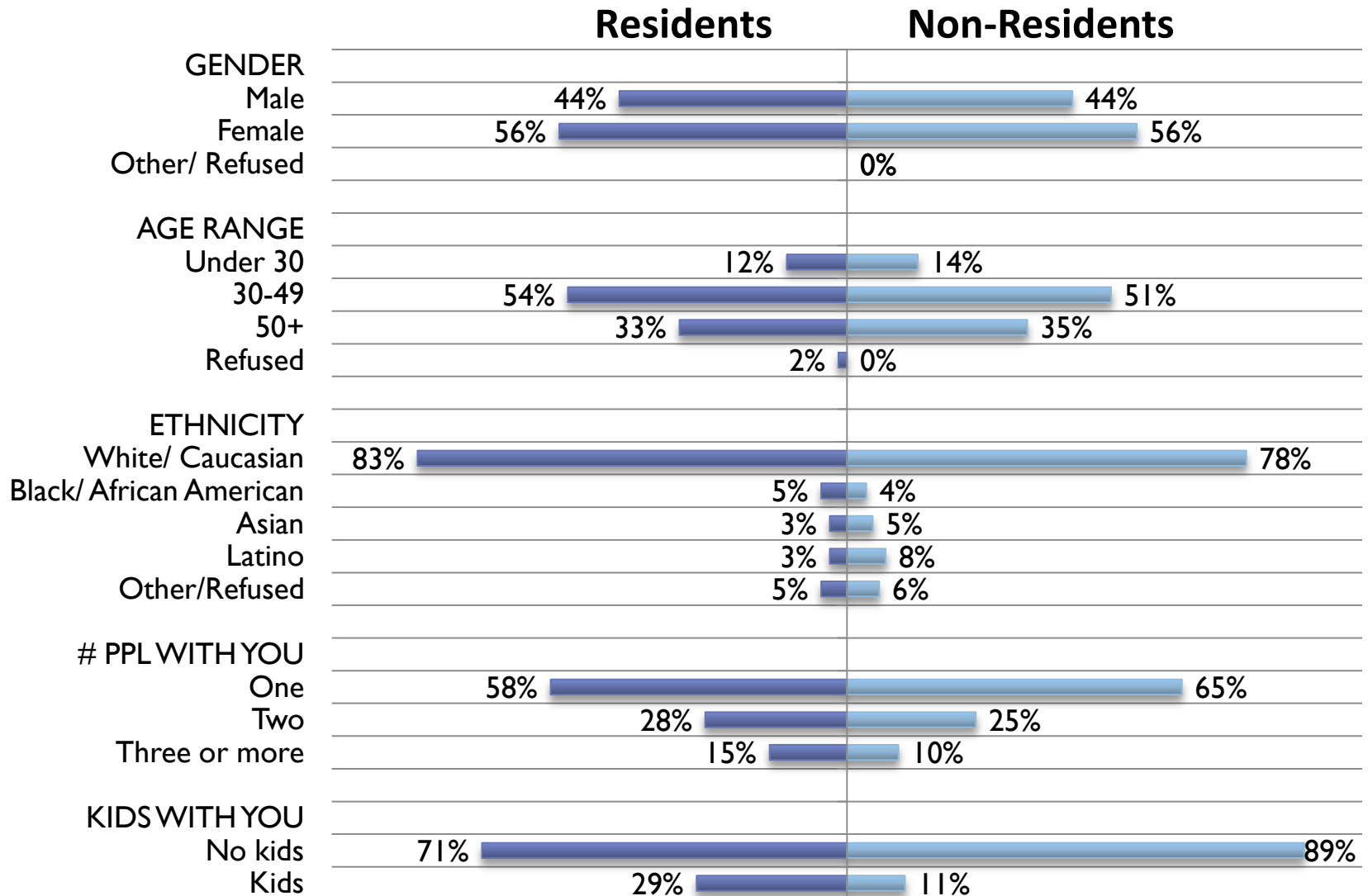
- Overall, there isn't much variation between the demographic profiles of residents and non-residents in any neighborhood.
- Othello's visitors are the youngest of the neighborhoods surveyed, with over half of its resident (53%) and a third of its non-resident visitors (34%) under age 30. Capitol Hill is the second-youngest, with 41% of its resident and 32% of its non-resident visitors under 30.
- Othello's visitors are by far the most ethnically diverse of the neighborhoods surveyed. A majority of its visitors are African American (32% of residents; 26% of non-residents) and Asian (21%; 26%) - only a third are Caucasian (31%; 35%).
- More than two-thirds of visitors in Admiral, Ballard, Capitol Hill and Fremont are Caucasian.
- A majority of non-residents surveyed in Columbia City (64%), Ballard (62%) and Fremont (55%) were among groups of two or more at the time of interviewing.
- Over a quarter of residents surveyed in Admiral and Columbia City had children with them at the time of interviewing.

Visitor Geography

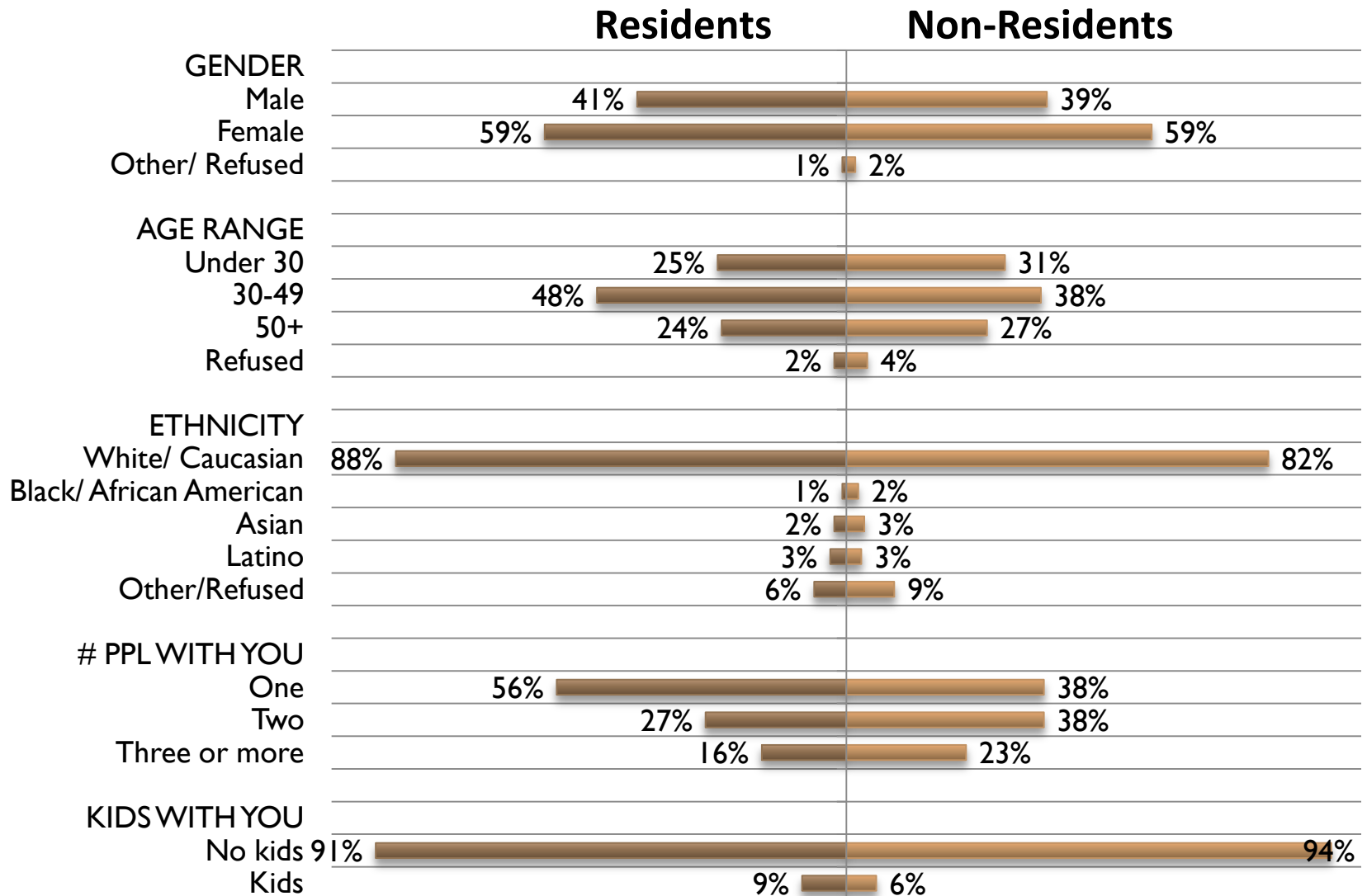
Q17. What is your home zip code?

Geography	Admiral	Ballard	Capitol Hill	Fremont	Columbia City	Othello
West Seattle/ White Center	78%	2%	2%	1%	1%	3%
Ballard/ Crown Hill	0%	37%	1%	6%	1%	1%
Cap. Hill/ First Hill/ DT/ Montlake	3%	7%	56%	9%	16%	5%
Fremont/ Wallingford/ U-District	1%	12%	5%	24%	2%	2%
Columbia City/ Othello/ Rainier	2%	2%	2%	3%	51%	63%
Northgate/Shoreline	0%	4%	3%	1%	3%	1%
Queen Anne/Magnolia/SLU	1%	11%	2%	8%	1%	0%
Burien/Seatac	4%	1%	0%	5%	3%	7%
Other Outside Seattle	7%	16%	16%	34%	13%	14%
Refused/ No answer	3%	8%	13%	9%	8%	5%

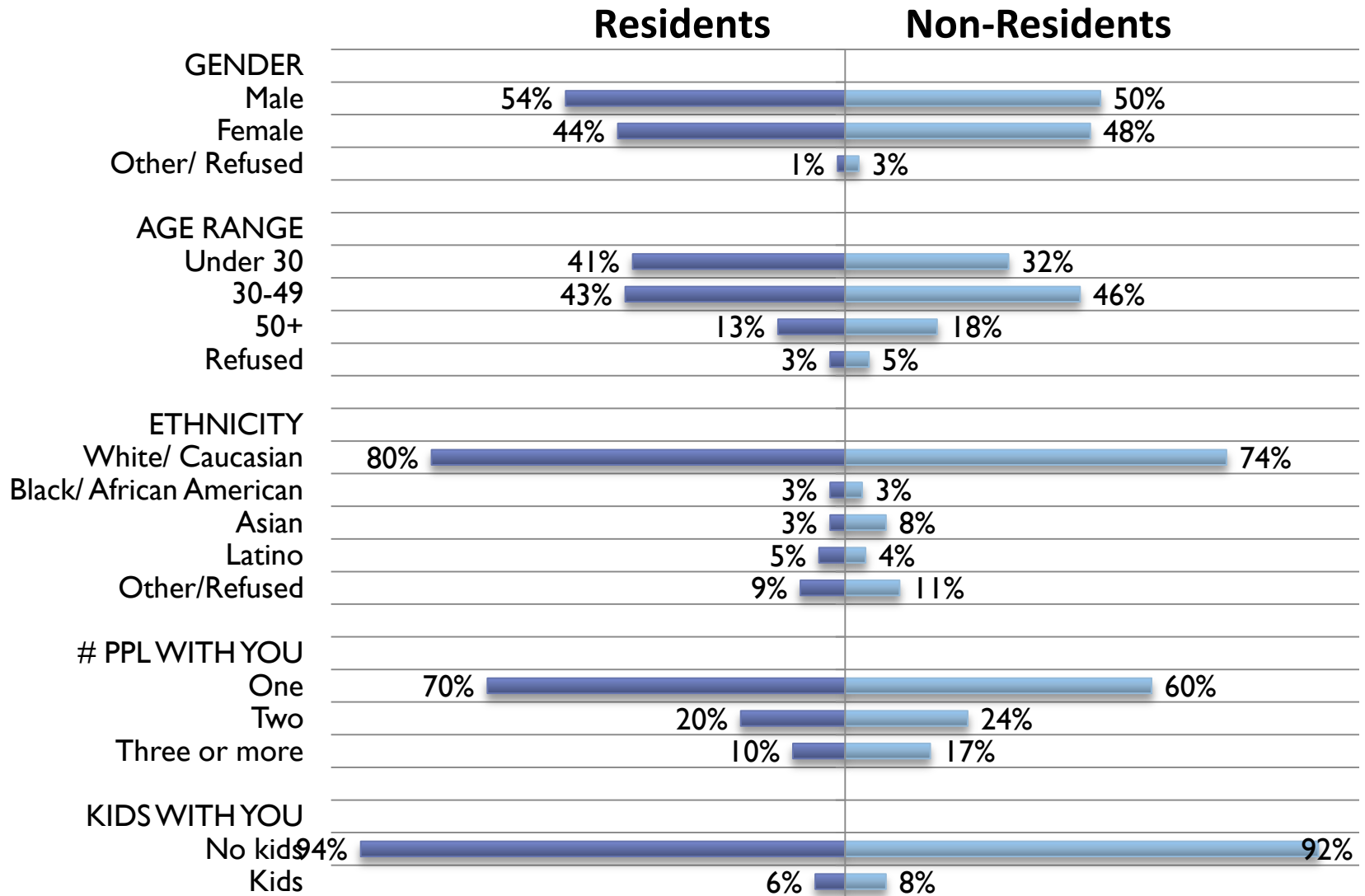
Admiral Visitor Demographics



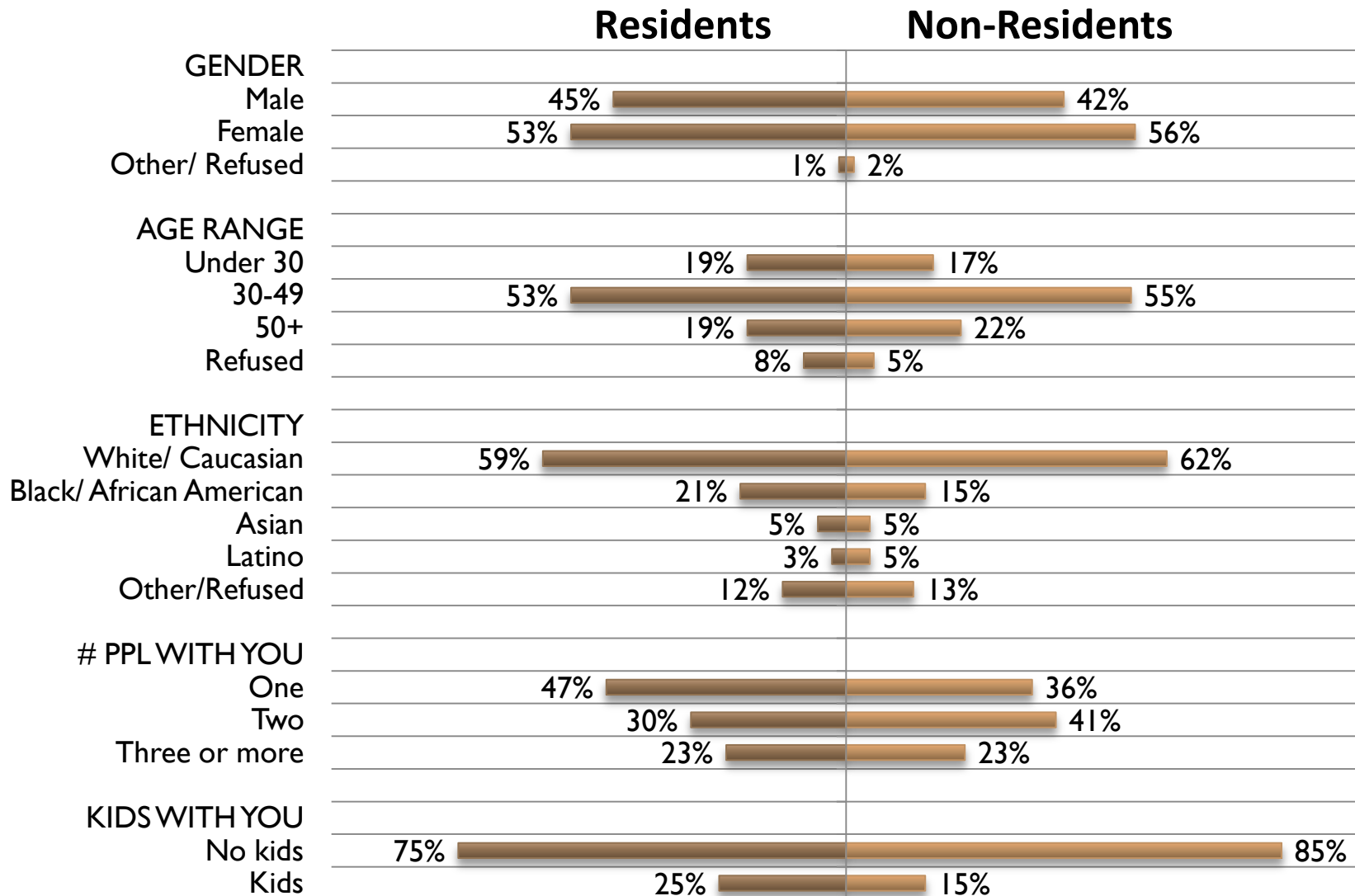
Ballard Visitor Demographics



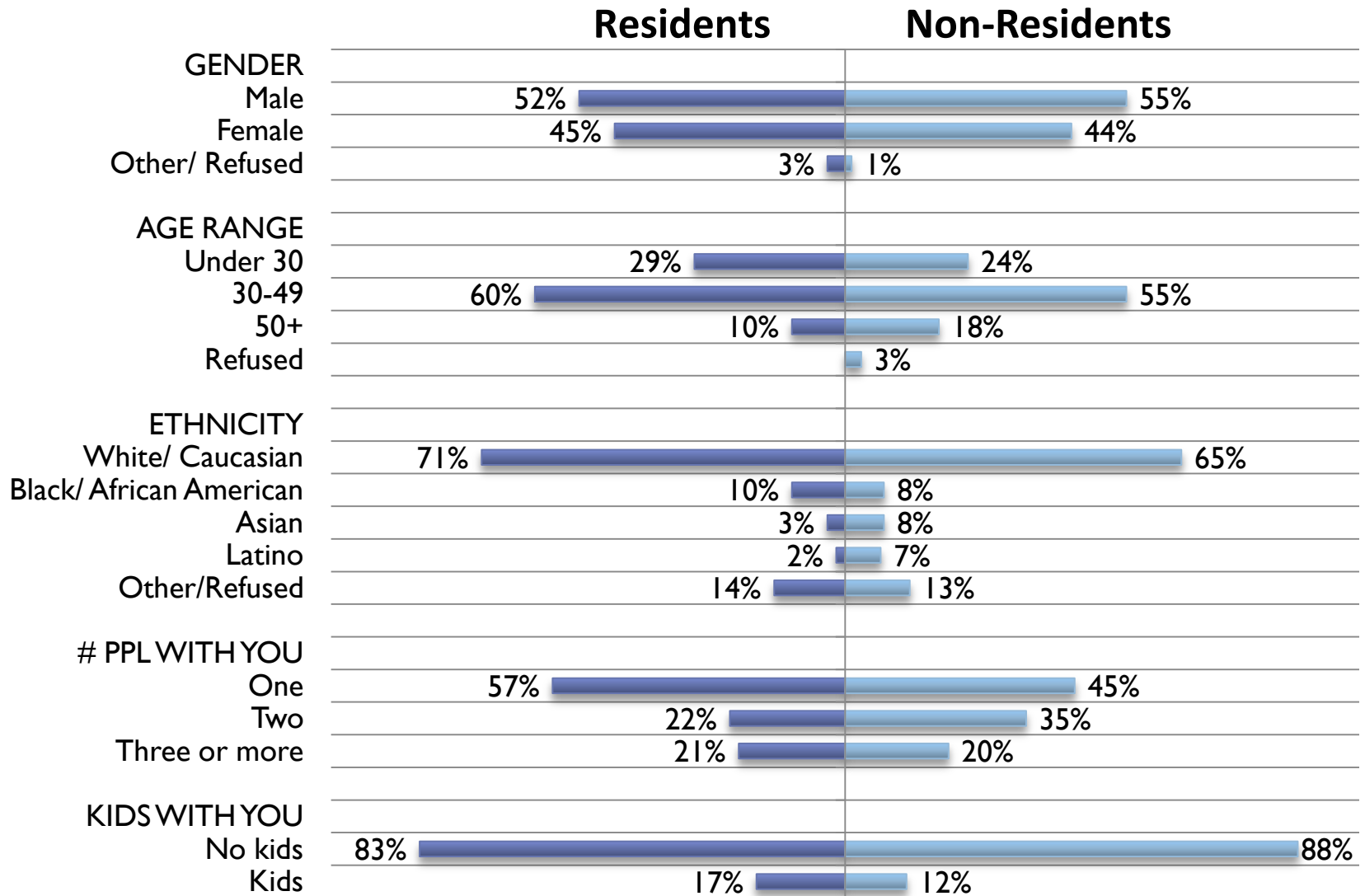
Capitol Hill Visitor Demographics



Columbia City Visitor Demographics



Fremont Visitor Demographics



Othello Visitor Demographics

