Ballard
Neighborhood Intercept Survey
Conducted for the
Seattle Department of Transportation
October 2017
Survey Overview

- **Purpose and Methodology Overview**
  - To better understand behaviors among people visiting and working in Ballard.
  - An intercept survey was conducted over a two week period. Interviewers were stationed at key intersections during weekdays and administered a brief survey to pedestrians passing by.

- **Objectives**
  - Gauge the general frequency and length of stay of visitors.
  - Investigate the key reasons for visiting.
  - Understand how visitors travel to/from Ballard and parking behaviors of those who drive or carpool.
  - Identify ways the City can help to sustain and improve visitation to the area.
  - Quantify the demographic characteristics of visitors to the area.

- **Definitions**
  - Throughout this report the term “Visitors” refers to respondents who do not live nor work in Ballard.
  - The term “workers” refers to respondents who work in Ballard, but do not live there.
  - The term “respondents” refers to all respondents regardless of their live / work situation.
Key Findings (1)

- **Residency**: Forty-two percent of survey respondents are “visitors”, that is they neither live nor work in Ballard.

- **Mode Share**: Thirty-one percent of respondents walk, and the same percent drive alone. Nineteen percent carpool, and 9% take a bus.
  - **Driving**: Sixty-one percent of “workers”, those who work near Ballard but don’t live in the area, drive alone.

- **Trip Purpose**: Eating out, shopping and working are the most commonly mentioned primary reasons for being in Ballard.
  - While visitors and residents have a variety of trip purposes, those who work in Ballard are in the area almost exclusively for work.

- **Spending**: Eighty-eight percent of respondents plan on spending money while in the area.
  - The average anticipated spend is $54.81
  - Those who take a personal vehicle plan on spending the most money ($67.48). This is more than twice the planned spend among those who walk or bike ($33.56) and transit riders ($28.56).
Key Findings (2)

- **Trip Purpose**: Visitors, those who neither live nor work in Ballard, have various trip purposes.
  - Thirty percent state the primary purpose for their trip is eating out, 28% are visiting family or friends and 17% are in Ballard to go shopping.
  - Typical reasons for visiting Ballard include going out to eat (46%), visiting family / friends (42%), shopping (27%), recreation / events (22%) and grabbing coffee or a snack (19%).
Methodology

- A total of 490 interviews were completed in the University District with an overall margin of error of +/- 4.4% at the 95% confidence level.

- Two-interviewers were on-site to distribute and collect single page paper surveys and help respondents as needed. Interviewing took place over two the following dates and times (all in 2017).
  - September 19: 10:00am to 2:00pm – 22\textsuperscript{nd} & Market (40 completes)
  - September 20: – 24\textsuperscript{th} & Market (37 completes)
  - September 21: – Ballard & Vernon (48 completes)
  - September 22: – 22\textsuperscript{nd} & Ballard (80 completes)
  - September 23: – 22\textsuperscript{nd} & Ballard (70 completes)
  - September 24: – Ballard & Vernon (96 completes)
  - September 26: – 22\textsuperscript{nd} & Market (61 completes)
  - September 27: – 24\textsuperscript{th} & Market (29 completes)
  - September 27: – Ballard & Vernon (68 completes)
  - September 28: – 24\textsuperscript{th} & Market (79 completes)
  - September 28: – Ballard & Vernon (33 completes)

- Periods of inclement weather impacted response rates at times.

- Surveys were available in English only.

<table>
<thead>
<tr>
<th>Location</th>
<th>Completes</th>
</tr>
</thead>
<tbody>
<tr>
<td>22\textsuperscript{nd} &amp; Ballard</td>
<td>150</td>
</tr>
<tr>
<td>22\textsuperscript{nd} &amp; Market</td>
<td>102</td>
</tr>
<tr>
<td>24\textsuperscript{th} &amp; Market</td>
<td>145</td>
</tr>
<tr>
<td>Ballard &amp; Vernon</td>
<td>244</td>
</tr>
<tr>
<td>Total</td>
<td>641</td>
</tr>
</tbody>
</table>
Survey Locations

- The map below displays the locations where interviews were conducted.
Survey Questionnaire

BALLARD NEIGHBORHOOD SURVEY

The City of Seattle’s Department of Transportation is conducting this survey to better understand how people who live, work, and visit downtown Ballard travel to the area. No personally identifiable information will be collected and the results will be used for research purposes only.

1. Do you live and/or work in Ballard?
   - Live
   - Work
   - No / Neither

2. IF YES TO LIVE: How far, in blocks, do you live from this intersection?  
   NUMBER OF BLOCKS: ________

3. IF YES TO LIVE: How long have you lived at your current residence? If less than 1 year, enter 0.  
   NUMBER OF YEARS: ________

4. IF YES TO WORK: How long have you worked in Ballard? If less than 1 year, enter 0.  
   NUMBER OF YEARS: ________

5. What is the main reason you’re in downtown Ballard today?
   - Live here
   - Work here
   - Work-related trip
   - Shopping
   - Dining / Eating out
   - Entertainment
   - Special Event
   - Visiting family / friends
   - School / Class
   - Catching a bus
   - Medical appointment
   - Other: ________

6. How did you get to downtown Ballard today?
   - I live here
   - Drove alone in private vehicle
   - Drove / rode with someone in a private vehicle
   - Walked (number of blocks: ________)
   - Personal bike (number of miles: ________)
   - Bikeshare (Spin, Lime, Ofo)
   - Bus (route number: ________)
   - Uber / Lyft
   - Car2go / Zipcar / ReachNow alone
   - Car2go / Zipcar / ReachNow with other people
   - Other: ________

7. IF YOU ROVED OR RODE WITH SOMEONE (INCLUDING CARSHARE): Where did you park?
   - On-Street, Paid Parking
   - On-Street, Free Time Limited Parking
   - On-Street, Free and No Time Limits
   - Off-Street Free (Lot / Garage / Driveway)
   - Off-Street, Paid / Permit (Lot / Garage / Driveway)
   - Other: ________

8. IF YOU ROVED OR RODE WITH SOMEONE (INCLUDING CARSHARE): How far away, in blocks, did you park from your destination?  
   NUMBER OF BLOCKS: ________

9. IF YOU ROVED ALONE (INCLUDING CARSHARE): Why did you choose to drive alone? (select up to 3)
   - Transit takes too long / is inconvenient
   - I need more information about other options
   - My job requires that I have a car for work
   - Family care or similar obligations
   - I do not feel safe walking or biking
   - Other: ________

10. How much time do you plan to spend in Ballard today? If less than 1 hour, enter 0.  
    ENTER ESTIMATED HOURS: ________

11. How much money do you plan to spend during your time in downtown Ballard today?  
    Enter 0 if you do not plan on spending any money.  
    ESTIMATED DOLLAR AMOUNT: ________

12. How do you plan to leave downtown Ballard today?
    - I live here
    - Drove alone in private vehicle
    - Drive / ride with someone in a private vehicle
    - Walk (number of blocks: ________)
    - Personal bike (number of miles: ________)
    - Bikeshare (Spin, Lime, Ofo)
    - Bus (route number: ________)
    - Uber / Lyft
    - Car2go / Zipcar / ReachNow alone
    - Car2go / Zipcar / ReachNow with other people
    - Other: ________

13. Did you use any services / apps as part of your trip?
    - No, I did not use any apps
    - PayByPhone
    - One Bus app
    - Micro’s Trip Planner
    - Google Maps
    - Carshare app
    - Bikeshare app
    - Other: ________

14. How often do you typically visit downtown Ballard?
    - I live here
    - Most weekdays (Monday-Friday)
    - Almost every day (6-7 days/week)
    - Several days a week (2-4 days / week)
    - About once a week
    - Several times a month (2-3 days / month)
    - About once a month
    - Less than once a month
    - First time visiting

15. What are the primary reasons you typically come to downtown Ballard? (up to 3)
    - I live here
    - I work here
    - Shopping
    - Going out to eat
    - Get coffee or a snack
    - Recreation
    - Farmer’s Market
    - Catch a bus
    - Event / Entertainment
    - Work-Related trips
    - School
    - Medical
    - Personal Business
    - Visit friends / family
    - Other: ________

16. What is your home zip code?  
    ENTER ZIP CODE: ________

17. Do you identify as...  
    - Male
    - Female
    - Other: ________

18. Are you...  
    - Less than 18 yrs old
    - 18 - 24 yrs old
    - 25 - 34 yrs old
    - 35 - 44 yrs old
    - 45 - 54 yrs old
    - 55 - 64 yrs old
    - 65 yrs or older

19. Are you... [Select at least one]  
    - American Indian / Alaskan Native
    - Asian / Pacific Islander
    - Black / African American
    - Latino / Hispanic
    - White / Caucasian
    - Other: ________

20. Do you speak any languages other than English?  
    If so which one(s)?  
    - No
    - Yes ________

21. What is the primary language that you speak at home?  
    - English
    - Spanish
    - Vietnamese
    - Chinese
Reporting Notes

- Unless otherwise noted, respondents who did not answer a specific question are excluded from the statistics shown for that question.
- There may be some instances where percentages do not sum to exactly 100% due to rounding.
- Some questions allowed multiple responses and may sum to more than 100%. These will be noted when applicable.
- The report makes reference to those who use a personal vehicle to get to the area. This includes people who drive alone as well as those who carpool.
Living and working in Ballard
Neighborhood Residence

Forty-two percent of respondents are visitors. That is they neither live nor work in Ballard. The same number (44%) live in Ballard.

- 14% both live and work in Ballard, and
- 30% live in Ballard but do not work in the area.

Q1: Do you live and/or work in Ballard?
Base: All respondents (n=641)
Seventy-two percent of residents (those indicating they live in Ballard) live within ten blocks of where they were contacted.

- Sixty-two percent of residents have lived in Ballard for 5 years or less.

Q2: How many blocks do you live from here?
Base: Residents (n=282)

Q3: How long have you lived at your current residence?
Base: Residents (n=282)
Sixty-nine percent of employees (those who work in Ballard regardless of if they live in the area) have worked in the area for less than 5 years.
Travel Behavior
Travel Behavior Findings

- Overall, walking and driving alone are the most commonly used travel modes used to get to Ballard—31% of respondents use each of these modes.
  - Nineteen percent of respondents carpool, and 9% take a bus.
- Respondents who work in Ballard, but do not live there, (workers) are the most likely group to drive alone—61% use this mode.
- Among all respondents, 49% use a personal vehicle to get to Ballard.
- The primary reason for driving alone is the feeling that public transportation is inconvenient or takes too long.
Overall, the most commonly used travel modes to Ballard are walking, (31%), driving alone (31%), carpooling (19%) and taking the bus (9%).
Travel Mode by Residency / Work Status (top 4)

Driving alone is the most common mode taken among workers (those who work but do not live in Ballard). Those who live in Ballard are most likely to walk and visitors are split between driving alone and carpooling.

Q6: How did you travel to the area? Multiple response: may sum to > 100%
Base: Visitors (n=267) – Work but not live (n=92) – Live but not work (n=193) – Live and work (n=89)
Personal Vehicle vs. Other Modes

Use of personal vehicle vs. alternative mode is evenly split.

Q6: How did you travel to the area? Multiple response: may sum to > 100%
Base: All respondents (n=641)
Personal vehicle is anyone who drove alone, carpooled. Carshare or rideshare is NOT a personal vehicle.
Those who live in Ballard are more likely to use alternative transportation modes.

Q6: How did you travel to the area? Multiple response: may sum to > 100%
Base: Visitors (n=267) – Work but not live (n=92) – Live but not work (n=193) – Live and work (n=89)
### Travel Mode By Origin (Table)

<table>
<thead>
<tr>
<th></th>
<th>Drove Alone</th>
<th>Walked</th>
<th>Carpool (private vehicle)</th>
<th>Bus</th>
<th>Bike</th>
<th>Rideshare</th>
<th>Carshare</th>
<th>Other</th>
<th>Live in Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>North Seattle (n=394)</td>
<td>26%</td>
<td>44%</td>
<td>12%</td>
<td>7%</td>
<td>6%</td>
<td>1%</td>
<td>0%</td>
<td>2%</td>
<td>18%</td>
</tr>
<tr>
<td>Seattle (n=87)</td>
<td>40%</td>
<td>3%</td>
<td>22%</td>
<td>18%</td>
<td>10%</td>
<td>9%</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>North King / Snohomish (n=32)</td>
<td>63%</td>
<td>0%</td>
<td>31%</td>
<td>6%</td>
<td>3%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>East King (n=14)</td>
<td>50%</td>
<td>0%</td>
<td>43%</td>
<td>0%</td>
<td>7%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>South King (n=11)</td>
<td>73%</td>
<td>0%</td>
<td>18%</td>
<td>9%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Elsewhere (n=10)</td>
<td>30%</td>
<td>0%</td>
<td>30%</td>
<td>30%</td>
<td>20%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>

Q6: How did you travel to the area?  By home zip code  Multiple response: may sum to > 100%
Base: All respondents (n=641)
Overall, the primary reason for driving alone is that transit takes too long. This is followed by having a job that requires the use of a car.
Parking Place and Time to Find

Thirty percent of those who took a vehicle parked in an off-Street, paid parking spot, nearly the same amount used free off-street parking. Seventy-four percent of those who used a vehicle parked within two blocks of their destination.

Q7: Where did you park
Base: Those who drove (including carshare and carpool) (n=320)

Q8: How many blocks away from your destination did you park?
Q13: Did you use any services / apps as part of your trip? Multiple response: may sum to > 100%
Base: All respondents (n=641)
Duration and Frequency of Visits
Duration and Frequency Findings

- The average duration of a trip to Ballard is just over 5 and a half hours, but varies by residency / work status.
  - Visitors indicate they are going to spend the least time in the area—averaging 3 hours
  - Those who live and work in Ballard indicate they will spend the most amount of time in the area—just over 9 and a half hours.
- Overall, 31% of respondents visit Ballard less than once a week.
Two-thirds of respondents plan on spending 2 hours or less in the area.

**Duration of Visit**

Q10: How much time do you plan to spend during your visit today?
Base: All respondents (n=641)

(Duration of Visit
(Mean=5.7 hours))

- One hour or less: 17%
- 2 hours: 28%
- 3 hours: 16%
- 4 to 5 hours: 11%
- 6 to 8 hours: 12%
- More than 8 hours: 18%
- More than 8 hours: 18%
Visitors indicate they are going to spend the least time in the area—averaging 3 hours. Those who live and work in Ballard indicate they will spend the most amount of time in the area—over 9 hours.

Q10: How much time do you plan to spend during your visit today?
Base: Visitors (n=267) – Work but not live (n=92) – Live but not work (n=193) – Live and work (n=89)
Duration of Visit by Travel Mode

On average, those who walked or biked are most likely to be in the area the longest.

Q11: How much time do you plan to spend during your visit today?

Base: Personal Vehicle (includes carshare) (n=320) – Walk/Bike (n=204) – Public transit (n=57)

Note, the question was multiple response so it is possible for some respondent to have selected more than one mode.
Nearly one third (31%) of respondents visit Ballard less than once a week.

Q14: How often do you typically visit the area?
Base: All respondents (n=641)
**Frequency of Visits by Residency / Work Status**

**Visitors have the lowest frequency to Ballard—three out of four visitors come to Ballard less than once a week.**

Q14: How often do you typically visit the area?
Base: Visitors (n=267) – Work but not live (n=92) – Live but not work (n=193) – Live and work (n=89)
**Frequency of Visits by Travel Mode**

*Those who use walk or bike transit visit the area most often, closely followed by those who take transit to the area. Those who take a personal vehicle come to Ballard the least often.*

<table>
<thead>
<tr>
<th>Travel Mode</th>
<th>Almost every day</th>
<th>Most weekdays</th>
<th>2-4 days per week</th>
<th>About once a week</th>
<th>Less than once a week</th>
<th>I live here</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Personal Vehicle</strong></td>
<td>8%</td>
<td>15%</td>
<td>15%</td>
<td>12%</td>
<td>44%</td>
<td>6%</td>
</tr>
<tr>
<td><strong>Walk / Bike</strong></td>
<td>15%</td>
<td>6%</td>
<td>15%</td>
<td>4%</td>
<td>12%</td>
<td>47%</td>
</tr>
<tr>
<td><strong>Transit</strong></td>
<td>15%</td>
<td>15%</td>
<td>17%</td>
<td>13%</td>
<td>30%</td>
<td>11%</td>
</tr>
</tbody>
</table>

Q14: How often do you typically visit the area?
Base: Personal Vehicle (includes carshare) (n=320) – Walk/Bike (n=204) – Public transit (n=57)
Note, the question was multiple response so it is possible for some respondent to have selected more than one mode.
Reasons for Visiting
Eating out, shopping and working are the most commonly mentioned primary reasons for being in Ballard.

- While visitors and residents have a variety of trip purposes, those who work in Ballard are in the area almost exclusively for work.

When respondents were asked about their typical reasons for visiting Ballard the most commonly mentioned reasons were for eating out and shopping.
Main Reason for Today’s Visit

Eating out, shopping and working are the most commonly mentioned primary reasons for being in Ballard.

Q5: What is the main reason you’re in Ballard today?
Multiple response: may sum to > 100%
Base: All respondents (n=641)
Travel Mode by top two trip purposes

Those in the area to shop usually carpool drive alone or walk. Whereas those who are in the area for work-related purposes are most likely to drive.

Q6: How did you travel to the area? Multiple response: may sum to > 100%
Base: All respondents (n=641)
Main Reason for Today’s Visit by Residency / Work Status

While visitors and residents have a variety of trip purposes, those who work in Ballard, regardless of if they live in Ballard, are in the area primarily for work.

Q5: What is the main reason you’re in Ballard today? Multiple response: may sum to > 100%
Base: Visitors (n=267) – Work but not live (n=92) – Live but not work (n=193) – Live and work (n=89)
Main Reason for Today’s Visit by Travel Mode

Eating out and shopping are cited as the main reasons among most respondents regardless of travel mode.

<table>
<thead>
<tr>
<th>Personal Vehicle</th>
<th>Walk / Bike</th>
<th>Transit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dining / eating out</td>
<td>38%</td>
<td>25%</td>
</tr>
<tr>
<td>Shopping</td>
<td>28%</td>
<td>22%</td>
</tr>
<tr>
<td>Work here</td>
<td>25%</td>
<td>18%</td>
</tr>
<tr>
<td>Visit family / friends</td>
<td>9%</td>
<td>9%</td>
</tr>
<tr>
<td>Entertainment</td>
<td>9%</td>
<td>5%</td>
</tr>
<tr>
<td>Work-related</td>
<td>3%</td>
<td>2%</td>
</tr>
<tr>
<td>Medical...</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Special event</td>
<td>3%</td>
<td>1%</td>
</tr>
<tr>
<td>Catching a bus</td>
<td>0%</td>
<td>2%</td>
</tr>
<tr>
<td>Other</td>
<td>21%</td>
<td>22%</td>
</tr>
<tr>
<td>I live here</td>
<td>6%</td>
<td>38%</td>
</tr>
</tbody>
</table>

Q5: What is the main reason you’re in Ballard today?
Base: Personal Vehicle (includes carshare) (n=320) – Walk/Bike (n=204) – Public transit (n=57)
Note, the question was multiple response so it is possible for some respondent to have selected more than one mode.
Reasons for Typical Visit

When respondents were asked about their typical reasons for visiting Ballard the most commonly mentioned reasons were for eating, shopping, and the Ballard Farmer’s Market.

Q15: What are the primary reasons you typically visit the area?
Multiple response: may sum to > 100%
Base: All respondents (n=641)
Typical Reasons by Residency / Work Status

The findings for typical reasons are similar to the primary reason for being in Ballard. Visitors and residents have a variety of trip purposes. Workers are in the area almost exclusively for work.

Q16: What are the primary reasons you typically visit the area?
Multiple response: may sum to > 100%
Base: Visitors (n=267) – Work but not live (n=92) – Live but not work (n=193) – Live and work (n=89)
Spending
Spending Findings

- Eighty-eight percent (88%) of respondents plan on spending at least some money while in the area.
  - Among those who plan on spending money, the average spend is $54.81.
  - Visitors typically spend the most money while in the area and residents the least.
  - Those who use a personal vehicle area likely to have the highest spend while in the area.
Eighty-eight percent of respondents plan on spending at least some money while in the area.
• Among those who plan on spending money, the average spend is $54.81.

Q11: How much money do you plan to spend during your visit to the area today?
Base: All respondents (n=641). Mean calculated among those who do plan to spend money.
*Mean spend excludes those who do NOT plan on spending any money.
Spending by Residency / Work Status

On average, visitors spend the most. This is followed by those living and working in Ballard. Residents spend the least on average.

Q11: How much money do you plan to spend during your visit to the area today?
Base: Visitors (n=267) – Work but not live (n=92) – Live but not work (n=193) – Live and work (n=89)
*Mean spend excludes those who do NOT plan on spending any money.
Spending By Travel Mode

On average respondents who use a personal vehicle area spend the most, while those who use public transportation spend the least.

Q12: How much money do you plan to spend during your visit to the area today?
Base: Personal Vehicle (includes carshare) (n=320) – Walk/Bike (n=204) – Public transit (n=57)
Note, the question was multiple response so it is possible for some respondent to have selected more than one mode.
*Mean spend excludes those who do NOT plan on spending any money.
Respondent Demographics
Age and Gender by Residency / Work Status

Visitors (neither live nor work)
- Male: 43%
- Female: 56%

Work in Ballard (not live)
- Male: 52%
- Female: 48%

Live in Ballard (not work)
- Male: 40%
- Female: 59%

Live and Work in Ballard
- Male: 48%
- Female: 51%

Age Distribution:

- Visitors (neither live nor work)
  - <24: 31%
  - 25-34: 18%
  - 35-44: 16%
  - 45-54: 14%
  - 55-64: 13%
  - 65+: 8%

- Work in Ballard (not live)
  - <24: 32%
  - 25-34: 18%
  - 35-44: 16%
  - 45-54: 10%
  - 55-64: 6%
  - 65+: 3%

- Live in Ballard (not work)
  - <24: 33%
  - 25-34: 15%
  - 35-44: 14%
  - 45-54: 12%
  - 55-64: 14%
  - 65+: 12%

- Live and Work in Ballard
  - <24: 27%
  - 25-34: 23%
  - 35-44: 19%
  - 45-54: 14%
  - 55-64: 14%
  - 65+: 6%
Race and Language(s) Spoken by Residency / Work Status

- **White / Caucasian**: 75%
- **Asian / Pacific Islander**: 5%
- **Latino / Hispanic**: 10%
- **Black / African American**: 3%
- **American Indian / Alaskan Native**: 6%
- **Other**: 3%

Visitors:
- **(neither live nor work)**: 0%
- **Work in Ballard (not live)**: 20%
- **Live in Ballard (not work)**: 40%
- **Live and Work in Ballard**: 60%

Language Spoken:
- **English**: 95%
- **Spanish**: 95%
- **Chinese**: 97%
- **Vietnamese**: 96%
- **Other**: 3%
Geography / Origin

- North Seattle: 72%
- Downtown Seattle: 7%
- North King / Snohomish County: 6%
- Capitol Hill: 5%
- East King County: 3%
- South King County: 2%
- West Seattle: 2%
- South Seattle: 1%
- Elsewhere: 2%

Location based on zip code
Base: All respondents (n=641) Note: only 472 respondents provided locatable zip codes