Shilshole Bay Marina Open Space Use Survey

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Prepared for Shilshole Bay Marina and Maritime Marketing

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Executive Summary

In September 2023, Business Intelligence conducted a survey for Maritime Marketing. The purpose of this survey was to explore customers' preferences for usage of the open green space near dock H at Shilshole Bay Marina. The survey was disseminated via email to liveaboards, non-liveaboards, guest moorage customers, boating club members and others. In addition, the survey QR code was posted in the Shilshole Bay Marina office.

A total of 513 responses were received. Response rates from each customer type varied, from approximately 50% among liveaboard customers to only about 4% among boating club members/customers.

<u>Key findings</u>

- Overall, maintaining an open green space is the most popular option, with 63% of respondents rating it as very desirable. When asked to select their <u>most</u> preferred option, the majority (55%) selected open green space. Maintaining the green space is the top choice among all customer groups and there are no significant differences in desirability ratings between groups.
- A restaurant or dining option is second most popular, with 32% rating it very desirable and 31% selecting it as their most preferred option. A restaurant/dining option is significantly more desirable among non-liveaboard and guest moorage customers compared to liveaboard customers.
- Many open-ended comments support maintaining the green space. There are concerns that a restaurant would impact parking and security.
- In terms of specific dining preferences, customers say they would most often visit an informal option such as a pub, casual dining, or food trucks. Forty-three percent of respondents estimate that they would visit a pub at least once or twice a month.
- Liveaboard and non-liveaboard monthly moorage customers will likely visit a food establishment considerably more often than other types of customers.
- Some participants expressed concern that the number of questions about dining options imply that the Port has already decided on a restaurant. While a restaurant is/was not a foregone conclusion, the desire for a restaurant is often mentioned in the annual customer surveys, and there has been a plan for years to add a restaurant. It is advisable to communicate to customers on the survey findings for transparency.
- Almost 40% of respondents are non-liveaboard monthly moorage customers. Over one-third of respondents are liveaboard customers, followed by 11% guest moorage customers and 9% boating club members/customers.

Methodology

The survey was disseminated via email and QR codes the week of September 11th through October 2nd. Approximately 350 liveaboard monthly moorage customers were emailed the survey, of whom 176 responded (50% response rate). Approximately 1,000 non-liveaboard monthly moorage customers were emailed the survey, of whom 188 responded (19% response rate). Approximately 687 guest moorage customers were emailed the survey, of whom 54 responded (8% response rate). Tenants at Shilshole Bay Marina distributed the survey to approximately 1,256 of their boating club members/customers, of whom 44 responded to the survey (4% response rate). A total of 513 survey responses were received.

Analysis

Descriptive statistics (frequencies and means), T-tests and ANOVAs were conducted. T-tests and ANOVAs determine whether statistically significant differences between groups exist.

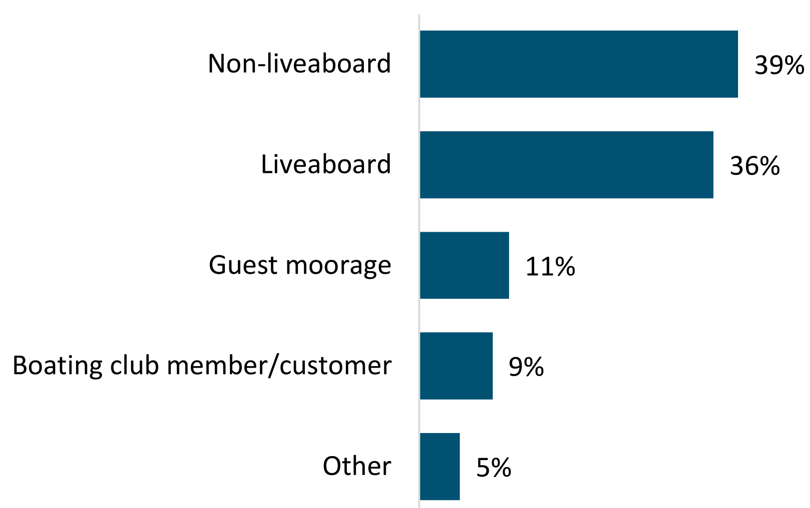
Note: Statistical significance helps quantify whether a result is due to chance or some other factor. If something is statistically significant, the assumption can made that the result is not due to chance and that actual differences exist between groups.

Findings

Respondent Profile

Customer Type

Almost 40% of respondents are non-liveaboard monthly moorage customers. Over one-third of respondents are liveaboard customers, followed by 11% guest moorage customers and 9% boating club members/customers.



Other, please specify:

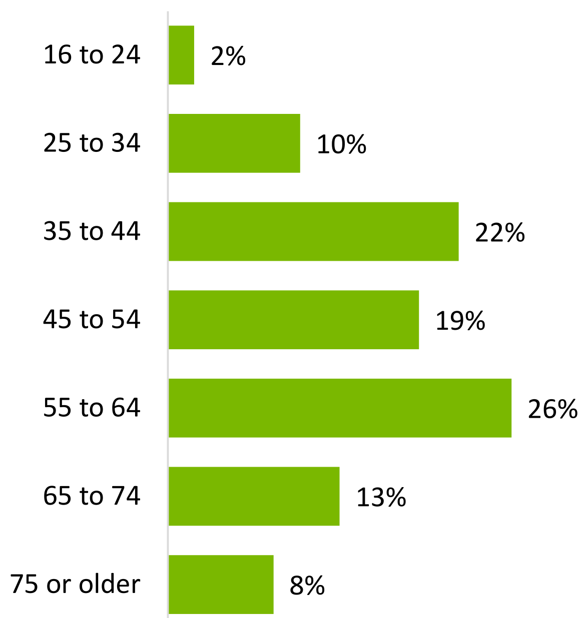
- Contract captain
- Employee

- Employee at Seattle Sailing club (n=3)
- Employee of tenant
- Employee of Windworks
- Ex liveaboard customer
- I work on and race on boats at Shilshole
- Local resident and marina guest
- Neighbor
- Previously moorage customer & close neighbor.
- Real estate tenant
- Retired yacht broker up the street. Often in that area with friends in the marina.
- Seasonal, +2-night guest moorage
- Seattle Yachts and possible private moorage tenants
- Tenant in summer via a sublet.
- Vendor
- We are a user of the marina facilities and guest moorage.
- Yacht delivery captain

Note: The “other” category does not represent a homogenous group and is excluded from analysis that compares responses by customer type.

Age

The average age of respondents was 52, with a range of 17 to 90.



Home Location

Slightly more than two-thirds (68%) of respondents live in Seattle, and 85% live in the state of Washington.

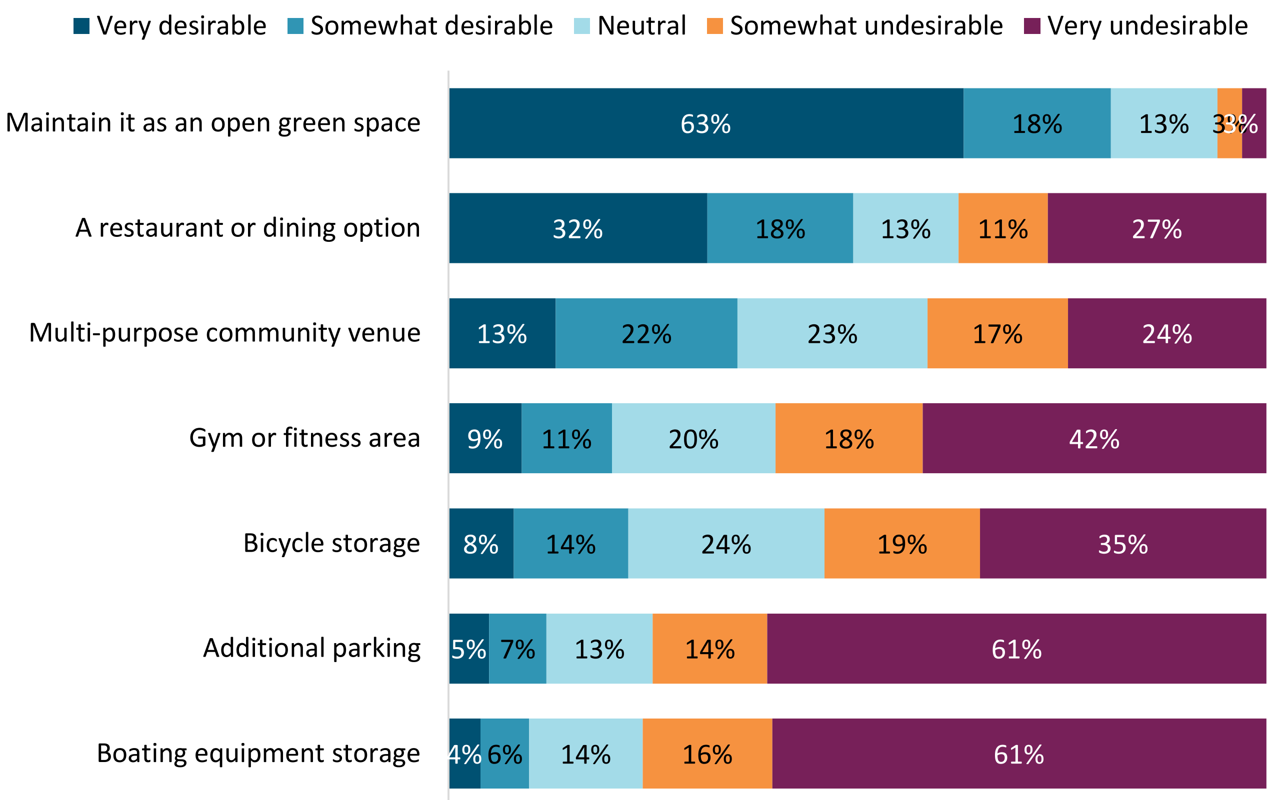
City	n
Seattle, WA	350
Bellevue, WA	13
Olympia, WA	4
Lynnwood, WA	4
Bothell, WA	4
Renton, WA	4
Everett, WA	4
Tacoma, WA	4
Kenmore, WA	4
Kirkland, WA	4
Mercer Island, WA	4
Edmonds, WA	3
Redmond, WA	3
Fairbanks, AK	2
Bellingham, WA	2
Mukilteo, WA	2
Friday Harbor, WA	2
Portland, OR	2
Poulsbo, WA	2
Anacortes, WA	2
Issaquah, WA	2
Woodinville, WA	2
Richland, WA	1
Snoqualmie Pass, WA	1
Long Beach, CA	1

City	n
Kingston, WA	1
Saint Petersburg, FL	1
Gales Creek, OR	1
Stanwood, WA	1
Mountlake Terrace, WA	1
Vancouver, WA	1
Goldendale, WA	1
Creston, WA	1
Nordland, WA	1
Rochester, MN	1
Wellpinit, WA	1
Denver, CO	1
Indianola, WA	1
Snoqualmie, WA	1
Elmhurst, IL	1
Suquamish, WA	1
Port Ludlow, WA	1
Towson, MD	1
Fox Island, WA	1
Bremerton, WA	1
Bainbridge Island, WA	1
North Bend, WA	1
Corvallis, OR	1
Port Clinton, OH	1

Respondents' preference for space usage

Respondents were asked how desirable or undesirable they would consider each of the following possible uses for the open green space near dock H.

Overall, 63% of respondents rated maintaining an open green space as very desirable, followed by 32% of respondents who rated a restaurant and dining option as very desirable. The least desirable options were boating equipment storage and additional parking.



On a scale of very desirable (5) to very undesirable (1), respondents rated maintaining an open green space as more desirable than other options with a mean of 4.3.

	Overall	Liveaboard	Non-liveaboard	Guest moorage	Customer	Other
Maintain it as open green space	4.3	4.5	4.3	4.1	4.4	4.1
A restaurant or dining option	3.2	2.7	3.4	3.7	3.2	3.8
Multi-purpose community venue	2.8	3.0	2.7	2.8	3.1	3.2
Bicycle storage	2.4	2.4	2.3	2.6	2.4	2.6
Gym or fitness area	2.3	2.6	2.0	2.2	2.1	2.4
Additional parking	1.8	1.5	1.9	2.0	1.9	2.2
Boating equipment storage	1.8	1.6	1.9	1.9	1.7	1.6

Though there were differences between groups, all groups selected maintaining an open green space as most desirable. Differences between groups include:

- Non-liveaboard customers (3.4 vs. 2.7; p<.001) and guest moorage customers (3.7 vs. 2.7; p<.001) have a stronger preference for a restaurant when compared to liveaboard customers.
- Non-liveaboard customers (1.9 vs. 1.5; p=.001) and guest moorage customers (2.0 vs. 1.5; p=.013) have a stronger preference for additional parking when compared to liveaboard customers.
- Liveaboard customers have a stronger preference for a gym or fitness area when compared to non-liveaboard customers (2.6 vs. 2.0; p<.001) and boating club customers (2.6 vs. 2.1; p=.026).

Respondents were asked to select the space usage they most preferred. Overall, the highest rated space use option was green space selected by 55% of respondents, followed by restaurant/dining option selected by 31% of respondents. Maintaining the green space was the top choice among all groups but was favored by more liveaboard customers.

	Overall %	Liveaboard %	Non-liveaboard %	Guest moorage %	Customer %	Other %
Maintain it as open green space	55	63	52	46	59	39
A restaurant or dining option	31	19	39	37	32	39
Multi-purpose community venue	5	7	1	6	5	13
Bicycle storage	3	3	2	2	2	0
Gym or fitness area	3	5	2	0	0	9
Additional parking	2	1	2	6	0	0
Boating equipment storage	1	1	1	2	2	0
Other	1	2	1	2	0	0

Respondents who answered "other" were invited to provide their vision for an alternative use of the space at Shilshole Bay Marina.

- A Mercado / small neighborhood grocery would transform this neighborhood and reduce single - occupant vehicle trips dramatically
- Additional garden space for veggies, Herbs, etc.
- An office specifically designated for the guest docks.
- Boating equipment exchange Venter N
- I envision a full-time security office fully staged 24/7 to at least make some sort of effort to keep our cars from being stolen and broken into. There needs to be a significant increase in parking lot and dock security.
- Pool and hot tub
- Please focus on reducing crime. Any redevelopment of the plot should take a backseat to figuring out security. Multiple cars per month get stolen or broken into...including mine. Now thieves are boarding boats from the water. A restaurant? Please. DO SOMETHING ABOUT SECURITY!!!

Respondents were asked, as a follow-up question, why their selection is their preferred option. This is a summary of the opinions provided. A complete list of verbatim responses is available on pages 17 to 38.

This is a summary of the pros and cons they listed as explanations for their choice.

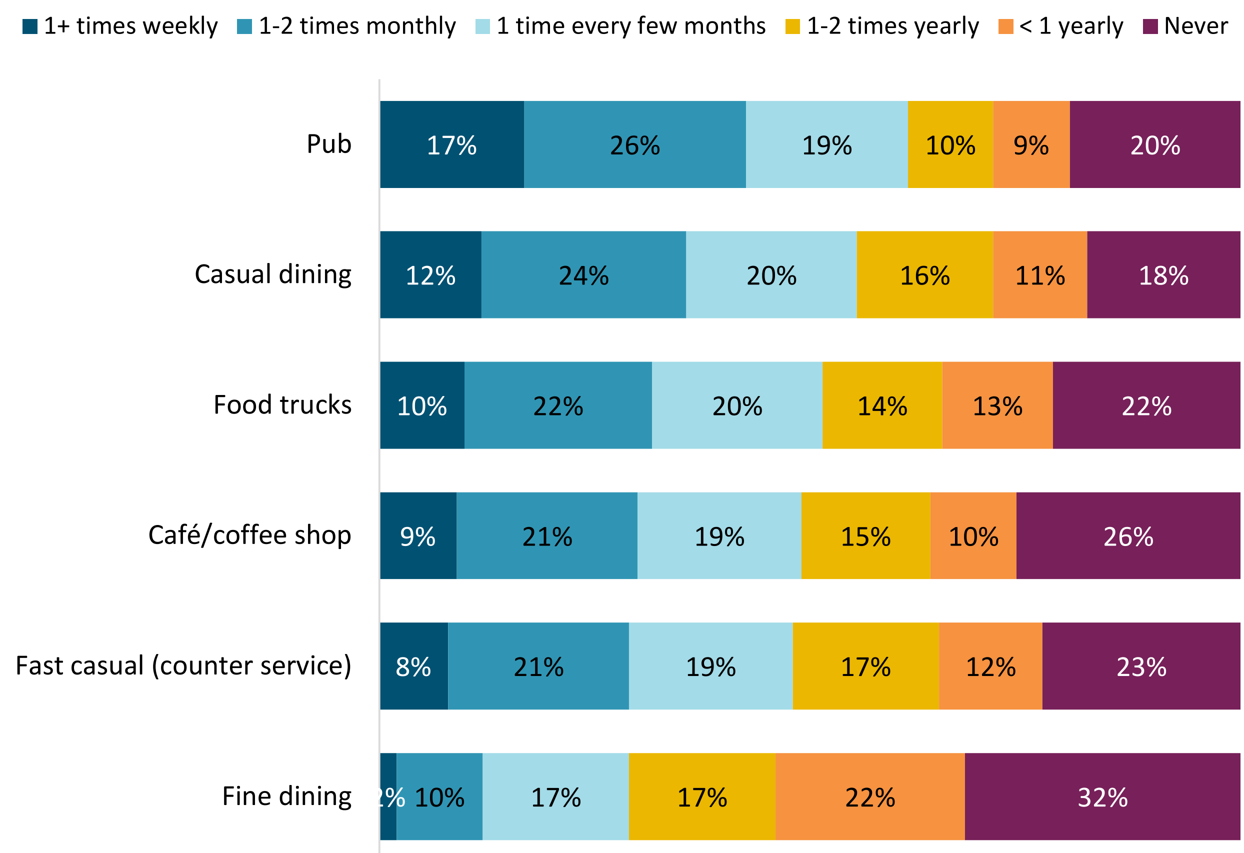
	Pros	Cons
Maintain the open green space	- Used by many people - The only green spot in Marina - Place to walk dogs - Open to everyone at no charge - Place for children to play - Protect green spaces/environmental concerns - Great for mental health and relaxation - Does not require capital expenditure that would be passed on to tenants	- Pee and poo place for dogs - Not everyone cleans up after their dog
Restaurant/dining option	- Nothing in walking distance - Would help build community - Could generate revenue which could be used to upgrade other amenities - The only marina without a restaurant	- Restaurant brings more rodents, traffic and reduces security - Noise - More people on docks. - Will take up parking spaces - More crime - Lots of restaurants in Ballard - Restaurant will be too expensive to visit often - There is already food available in the marina
Multi-purpose community venue	- For community events - No place currently to hold events - Build community - Could have farmers market	- n/a
Gym or fitness area	- Gyms in the area are very expensive	- Will only benefit certain groups (liveaboards)

	- Safe indoor space to work out - Some marinas have gyms - Apartment buildings have gyms - Promotes community and wellness	- Gym is not needed to get exercise - Needs to be included in moorage and not cost extra - Lots of gyms nearby
Bike lockers/storage	- Difficult to store on boat - No secure storage option available - Too much theft - Improve climate friendly options for transportation - Most bike parking does not feel secure	- No bike lockers are needed
Additional parking	- Took parking away with storage building - Need wider parking spaces - Need more parking during summer months	- Enough parking spaces - No more asphalt
Boat equipment storage	- Boats require a lot of equipment	- People will always fill up more storage space

Estimated visitation frequency by food establishment

Respondents were asked how often they would visit various food establishments if they were offered at Shilshole Bay Marina. Response categories: at least once a week, once or twice a month, once every few months, once or twice a year, less often than once a year, and never.

Overall, 43% of respondents estimated that they would visit a pub at least once or twice a month compared to 12% who estimated that they would visit a fine dining establishment at least once or twice a month.



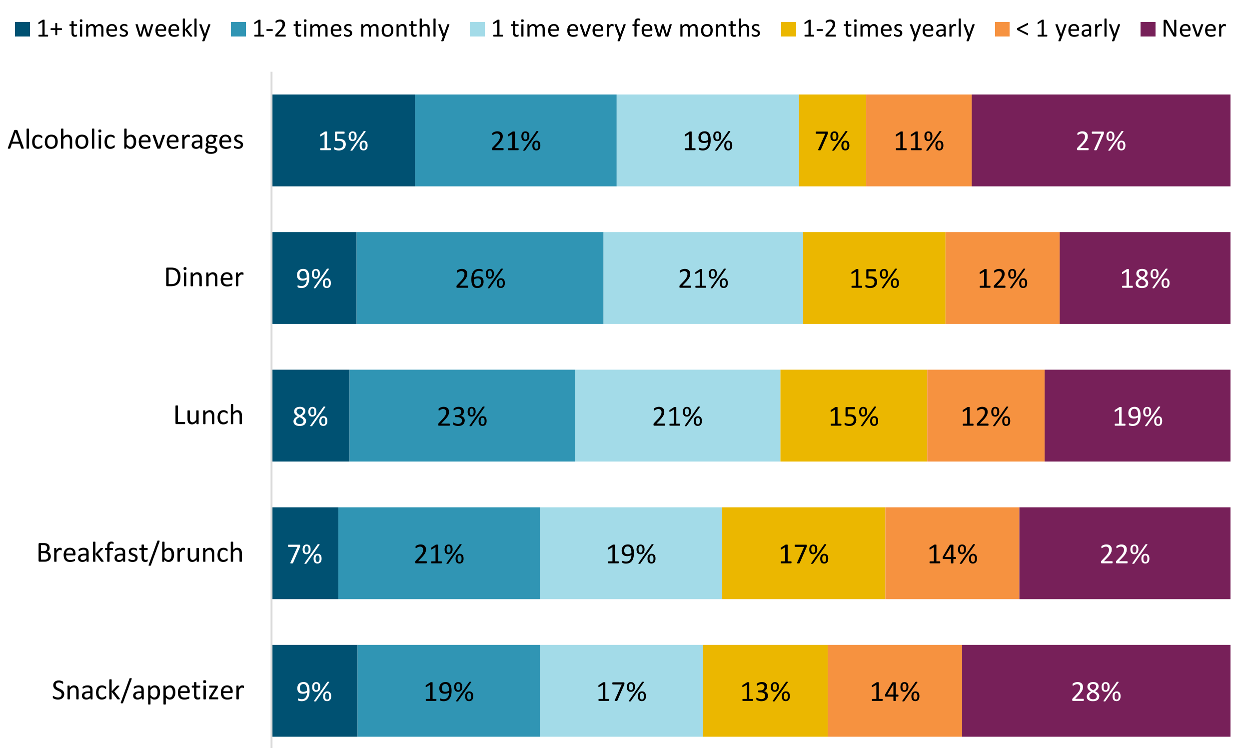
To examine expected frequency by food offering type and type of customer, the response categories were recoded into mid-point categories/estimates of how many times a respondent would visit a food establishment over the course of 12 months. At least once a week was recoded into 52, once or twice a month was recoded into 18, once every few months was recoded into 4, once or twice a year into 1.5, less often than once a year into .5 and never into 0. The following differences between customer groups emerge:

- Liveaboard customers, compared to non-liveaboard customers, estimated greater frequency of visits to food trucks (12.8 vs. 8.1; p=.003).

- Liveaboard customers, compared to guest moorage customers, estimated greater frequency of visits to food trucks (12.8 vs. 5.5; p=.002).
- Liveaboard customers, compared to guest moorage customers, estimated greater frequency of visits to a pub (17.1 vs. 8.8; p=.005).
- Liveaboard customers estimated a greater frequency of visits to a fast casual dining establishment compared to non-liveaboard customers (11.5 vs. 8.1; p=.028), guest moorage customers (11.5 vs. 3.8; p=.001) and boating club customers (11.5 vs. 5.4; p=.016).
- Liveaboard customers estimated a greater frequency of visits to a café compared to non-liveaboard customers (12.2 vs. 7.6; p=.004), guest moorage customers (12.2 vs. 7.0; p=.032) and boating club customers (12.2 vs. 5.9; p=.013).

Estimated visitation frequency by type of meal

Respondents were also asked about the frequency of visits by type of meal. Overall, 36% of respondents estimated that they would purchase alcoholic beverages at least once or twice a month and 35% estimated that they would purchase dinner at least once or twice a month.



To examine expected frequency by type of meal and type of customer, the response categories were recoded into mid-point categories/estimates of how many times a respondent would visit a food establishment over the course of 12 months. At least once a week was recoded into 52, once or twice a month was recoded into 18, once every few months was recoded into 4, once or twice a year into 1.5, less often than once a year into .5 and never into 0. The following differences between customer groups emerge:

- Liveaboard customers (12.5 vs. 4.3; $p<.001$) and non-liveaboard customers (10.1 vs. 4.3; $p=.010$) estimated visiting for dinner more frequently when compared to guest moorage customers.
- Liveaboard customers (11.9 vs. 3.7; $p<.001$) and non-liveaboard customers (9.2 vs. 3.7; $p=.019$) estimated visiting for lunch more frequently when compared to guest moorage customers.
- Liveaboard customers estimated visiting for lunch more frequently when compared to boating club customers (11.9 vs. 5.2; $p=.006$).
- Liveaboard customers estimated visiting for breakfast/brunch more frequently when compared to non-liveaboard customers (12.2 vs. 6.6; $p<.001$), guest moorage customers (12.2 vs. 6.1; $p=.007$), and boating club customers (12.2 vs. 2.8; $p<.001$).
- Liveaboard customers estimated visiting for snacks/appetizers more frequently when compared to non-liveaboard customers (12.2 vs. 7.8; $p=.006$), guest moorage customers (12.2 vs. 4.8; $p=.003$), and boating club customers (12.2 vs. 5.7; $p=.012$).
- Liveaboard customers estimated visiting for alcoholic beverages more frequently when compared guest moorage customers (14.2 vs. 8.1; $p=.029$).