

**CITY OF SEATTLE  
DEPARTMENT OF PLANNING AND DEVELOPMENT**

**INDUSTRIAL LANDS SURVEY**

---

**Survey of Business Owners**



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# Introduction

The City of Seattle's Department of Planning and Development (DPD) is developing a comprehensive strategy for the City's industrial lands. As a means of providing background data necessary for development of the strategy as well as involving key stakeholders, DPD retained ESA Adolfson to conduct a phone survey of a sample of industrial businesses in the city. The purpose of the survey was to obtain an in-depth understanding of industrial operations, identify the specific pressures industrial businesses are facing, and to solicit business owners concerns regarding the City's industrial land use policies. This report presents the results of that survey.

## Background

Based on the valuable role industrial lands play in the economy of the city of Seattle, the City's Comprehensive Plan established a goal to preserve the City's designated industrial lands. While industrial activities are recognized as a key component of the region's economy, they can also conflict with other non-industrial land uses because of noise, odor, or hours of operation. The City's designated industrial lands provide industries with protected locations to operate in order to minimize these potential conflicts.

In recent years, the City of Seattle has been under increasing pressure to change or modify the designations of these industrial lands to allow more non-industrial uses. Each year requests are made to amend the Comprehensive Plan designations of industrial lands to allow other uses. Nearly every year at least one proposal to change industrial zoning on a parcel to a non-industrial zone is made. In response to these requests, the City decided to examine these issues comprehensively and develop a strategy to protect its industrial lands. Such a strategy will provide overarching policy guidance on how to respond to these requests and how to preserve these industrial lands for the region's future.

The City has two designated manufacturing industrial centers (MICs); the Ballard Interbay Northend Manufacturing and Industrial Center (BINMIC) and the Duwamish Manufacturing/Industrial Center (Duwamish). The BINMIC covers approximately 866 acres and the Duwamish covers approximately 3,981 acres. The city has an additional 295 acres of land zoned industrial outside of the two centers (City of Seattle, 2005a).

As part of the process of developing an industrial lands survey, City staff began to collect and analyze information regarding existing condition of the city's industrial areas. The City's Planning Commission, the Office of Economic Development, and the Department of Planning and Development prepared a report in August 2005, titled City of Seattle Industrial Land Study. This study provides an overview of the city's current industrial areas, the zoning and allowable uses within those areas, and how these areas can accommodate future industrial growth. It also describes the pressures these lands are facing to convert to non-industrial uses (City of Seattle, 2005a).

A second study, prepared by the Seattle Planning Commission staff, titled *A Comparison of Industrial Lands Strategies*, was prepared in November 2005. This study also identifies some of the pressures that the City is facing to convert industrial lands to other uses. It then discusses four other cities that are facing similar problems and the strategies they are employing to address the problem (City of Seattle, 2005).

## Study Objectives

The objectives of this study are:

1. Involve a broad spectrum of industry owners and operators;;
2. Gather an in-depth understanding of how Seattle's industrial businesses operate;
3. Identify the specific pressures industrial businesses are facing to remain a viable enterprises; and
4. Solicit other concerns of industrial businesses and ideas to help in the development of industrial land use policies.

## Key Findings

The industrial businesses participating in this survey tended to be relatively small employers and who operate on relatively small sites and in small facilities. The respondent companies generally operate with local suppliers and local customers. Respondents tended to be tenants rather than owners.

Respondents indicated that they were partial to operating in Seattle and most said that if they were to relocate they would stay within the city. In fact, most of the businesses that had moved or changed location had relocated from within the Seattle industrial area. Primary reasons for their locational decisions included taxes, operational costs, traffic congestion, large truck access, adequate parking, cost of land/rent, and proximity to major highways.

Responses from the two industrial / manufacturing centers were in general similar, with some notable exceptions. The BINMIC had a higher percentage of marine-related businesses than the Duwamish and the industrial area as a whole. Survey participants in the BINMIC had been located at their addresses longer and had a higher rate of ownership than in the industrial area as a whole.

Several general themes emerged among the respondent's concerns. These concerns related to traffic and congestion, parking, infrastructure, ingress and egress issues, and operational costs. Most of the respondents also expressed concern about parking in the industrial areas. Lastly, respondents reported that the taxes and fees assessed by the City created a hardship for operation.

# Methods

Information for this study was collected through a phone survey of businesses located within the BINMIC and Duwamish MICs. A survey instrument was developed by City staff for the study. It was composed of 23 questions that focused on the following topic areas: 1) business demographics / background information; 2) employee information; 3) industry linkages; and 4) location factors.

The survey instrument collected information through both short-answer questions aimed at specific information, and through open-ended questions designed to elicit more in-depth responses. For most of the short-answer question, results were easily summarized and displayed. In the case of the open-ended questions, categories were created and results were summarized and displayed based on common themes expressed by the respondents. A copy of the survey instrument is included in Appendix A.

A list of 300 potential survey participants of businesses located within the BINMIC and Duwamish MICs was developed by City staff in coordination with the Manufacturing and Industrial Council and supplied to ESA Adolfson. Firms located outside of the two manufacturing / industrial centers were not included in the survey. The survey was conducted in December 2006 and January 2007.

DPD staff prepared and mailed a letter of introduction to all of the potential survey participants in mid-December. ESA Adolfson began contacting each business on the staff-supplied list shortly before the letter was sent. Each business on the list was contacted and asked to participate at least twice. Surveys were primarily conducted over the phone but some respondents asked to be faxed or emailed the surveys. A total of 102 businesses responded to and completed the survey.

The results of this survey provide important information and raise important issues related to the city's industrial businesses. The trends identified within the surveyed population can serve as a guide to the planning process, but any conclusion drawn from these data must be considered carefully. The sampling methods used in this survey were not statistically valid. The applicability of these results may not be broadly applied, with any measure of confidence, to the greater population of industrial businesses. A complete summary of results from the survey are included in Appendix B.

## Survey Geography

Businesses on the contact list were a sample population of industrial businesses from Seattle's two major industrial areas, Ballard Interbay Northend Manufacturing/Industrial Center (BINMIC) and the Duwamish Manufacturing/Industrial Center (Duwamish). The BINMIC was further divided into two sub-areas; BINMIC North and BINMIC South. BINMIC North includes everything north of W Dravus Street, and BINMIC South includes everything south of W Dravus Street. Within the Duwamish there are four sub-areas; two areas east of the river, north of Spokane Street (SODO) and south of Spokane Street (Georgetown); and two areas west of the river, the South Park area (South Park) and everything else west of the river including Harbor Island (West Seattle).

# Survey Response Rate

Table 1 provides a breakdown, by geographic area, of the 300 businesses and the 102 survey respondents, with response rates for each area as well as the total:

**Table 1. Industrial Businesses Surveyed and Response Rates**

Location Designation	DPD List	Respondents	
		Number	Percent
BINMIC North	75	24	32%
BINMIC South	15	3	19%
SODO	68	30	44%
Georgetown	108	35	32%
South Park	23	8	35%
West Seattle	11	4	38%
<b>Totals</b>	<b>300</b>	<b>102</b>	<b>34%</b>

In general, the 102 respondents were distributed through the geographic areas in similar proportions as in the original list of potential respondents. Roughly a third of the potential contacts participated in the survey overall. The lowest response rate was in the BINMIC South area (19 percent), which was also the smallest pool of possible respondents. Also, because of the relatively small number of respondents in some areas, the importance of the results presented in the report as percentages may be overstated. In other words, individual respondents in smaller groups will have more influence over the total outcome. The sample size or number of respondents should be considered when reviewing these results.



# Results

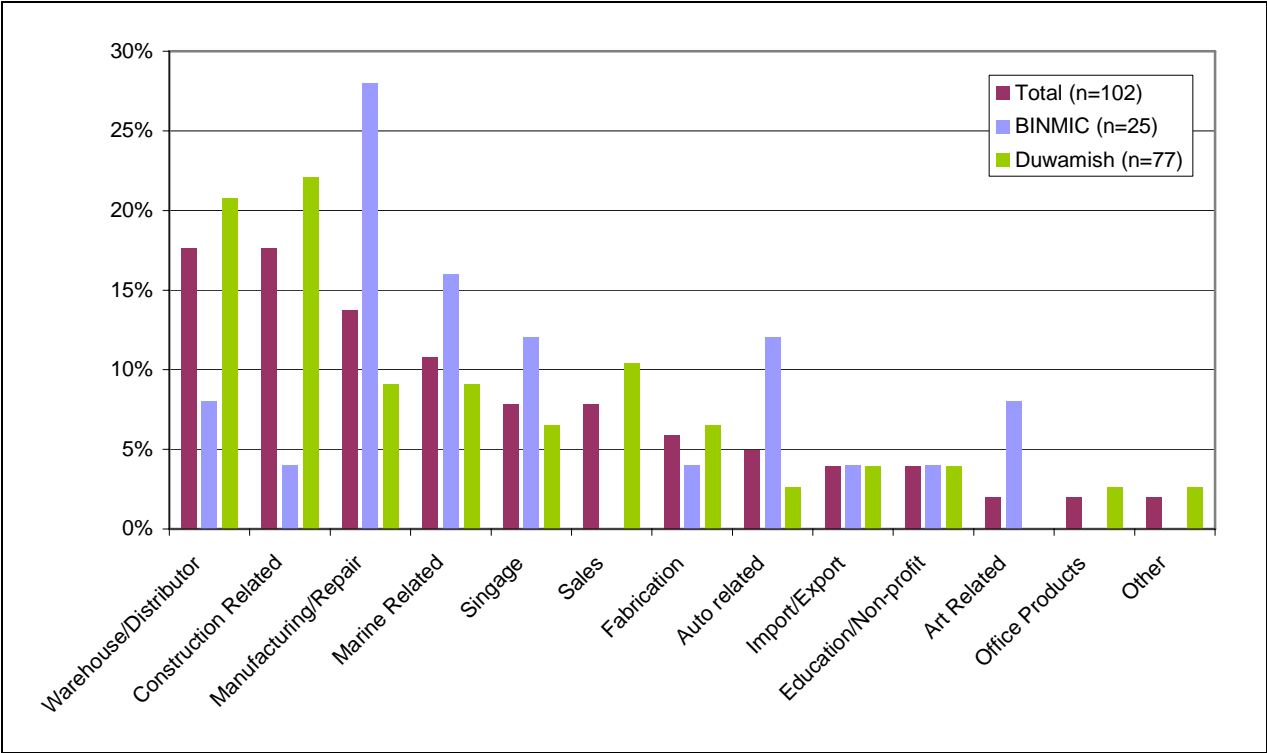
## Business Demographics/Background Information

### Question 1: Primary Goods or Services Sold from Location

Question 1 asked respondents what primary goods and/or services are manufactured/sold from their location (Figure 1). Responses were categorized into one of thirteen categories. These include, auto-related, warehouse/distributing, art-related, import/export, fabrication, constructed-related, manufacturing/repair, marine-related, signage, office products, sales, education/non-profit, and other. Warehouse/distribution and construction-related businesses were the largest category, each with 18 percent. Manufacturing/repair was next, with 14 percent, followed by marine-related business (11 percent). No other categories contained more than 10 percent.

The BINMIC has a higher percentage of manufacturing/repair and marine-related businesses, while the Duwamish has more construction-related and warehouse/distribution businesses. In the BINMIC manufacturing/repair (28 percent), marine-related businesses (16 percent), and auto-related and signage (12 percent) occurred in higher proportion than in the Duwamish area. In the Duwamish area construction related businesses had the majority with 22 percent, followed by warehouse/distribution with 21 percent, and sales with 10 percent.

**Figure 1. Primary Goods or Services Sold from this Location**

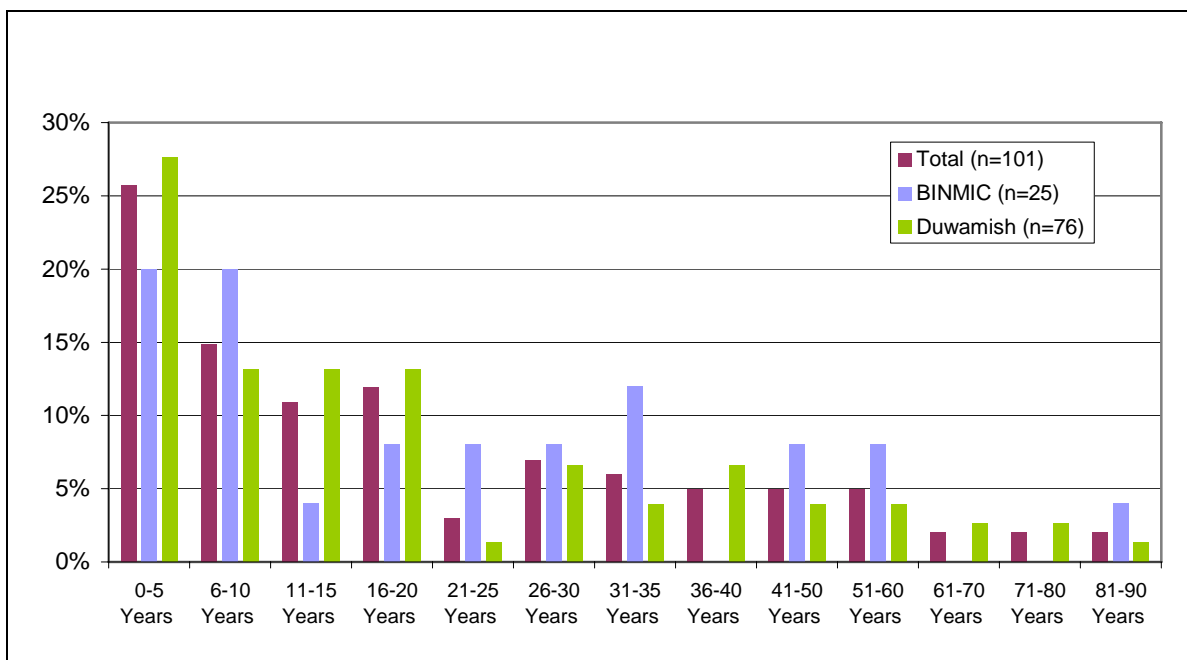


## Question 2: Years Located at Current Address

In Question 2, respondents were asked to identify how many years the company had been located at its current address (Figure 2). The largest group (26 percent) had been at their location for between 0 to 5 years. Those at their current locations from between 6 to 10 years followed at 15 percent. This downward trend continued with a small jump at 16 to 20 years (12 percent).

Among all respondents, the median duration of time at their current address was 15 years. Respondents in the BINMIC and Duwamish had median location durations of 20 years and 14 years respectively. Many of the respondents stated that they had relocated from other facilities within the Seattle industrial area. Most of the relocations were due to business expansion, better facilities, or cheaper land/rent.

**Figure 2. Years Located at Current Address**



## Question 3: Is the Company an Owner or a Tenant?

This question asked respondents if the business was an owner or tenant of the property identified in Question 2. The majority of respondents (68 percent) were tenants; the remaining 32 percent were owners. In the BINMIC industrial area, 76 percent of businesses were tenants and 24 percent were owners, whereas in the Duwamish 65 percent were tenants and 35 percent were owners. In the industrial area as a whole there are about twice as many business that lease than own.

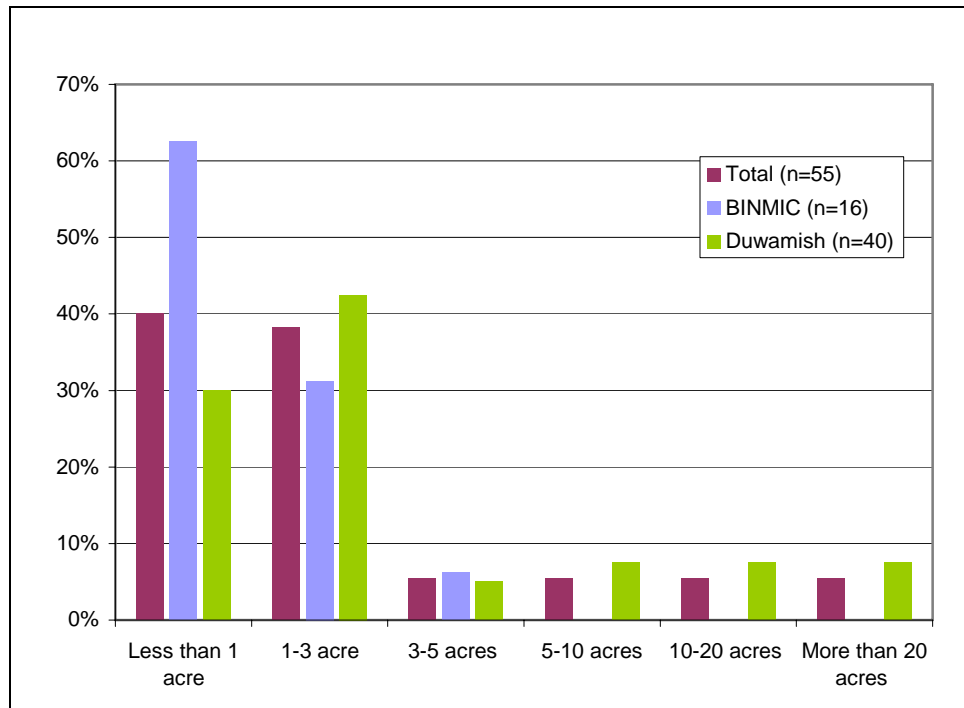
## Question 4: Is this a Multi-tenant Building?

As a follow-up question, respondents were asked if the facility identified in Question 2, was a multi-tenant building. Results of this question indicated that approximately half of the respondents (50 percent) were in multi-tenant buildings.

## Question 5: Land Area and Building Space

Question 5 asked respondents to estimate the current land area and the building space at their site (Figure 3). Only 54 percent of participants responded to the question. Of those who responded, 78 percent were within the first two categories and had land area less than 3 acres. The remaining four categories each had approximately 5 percent of responses each. The median land area for recorded responses was 1 acre. This suggests that the majority of industrial businesses in the Seattle area operate in relatively small locations.

**Figure 3. Land Area**



Ninety-four percent of those surveyed responded when asked to estimate building square footage (Figure 4). Of those, 25 percent had between 1,000 and 5,000 square feet, while 18 percent had between 5,000 and 10,000 square feet, and 22 percent had between 10,000 and 25,000 square feet. The median building square footage was 12,500 square feet.

Survey responses also indicate a difference between geographic areas. Land and building areas in the BINMIC area were generally smaller than in the industrial area as a whole (Figure 3 and 4). The largest percentage (63 percent) of respondents had less than 1 acre and 46 percent had 1,000 to 5,000 square feet of building area. Meanwhile, in the Duwamish, businesses had larger land areas and larger building areas than in the industrial area as a whole. The majority (43 percent) of land areas were between 1 and 3 acres. Building square footages were larger across the board with the majority (42 percent) split between 10,000 to 25,000 and 25,000 to 50,000 square feet. This indicates that the Duwamish area has larger lots and bigger buildings allowing more expansive operations.

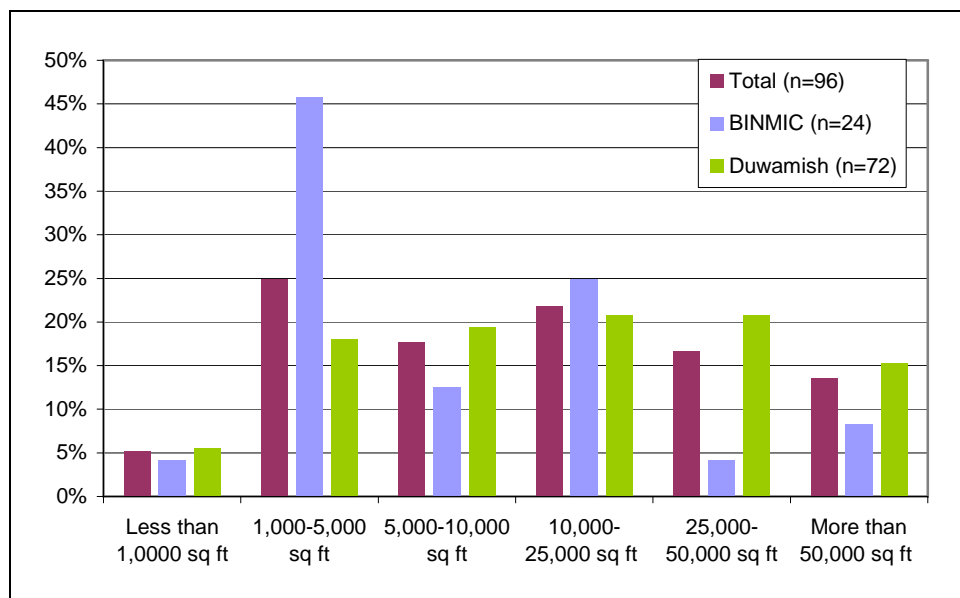
Land area data were cross-tabulated with business type data from Question 1. As shown in Table 2, fabrication and construction-related businesses had some of the largest land areas, as evidenced by the high mean, but also contain business on small properties, as evidenced by the relatively low median. By a large margin, the education/Non-profit category has the highest median land area, but contained only one respondent. In general warehouse/distribution and marine-related businesses were the largest land users among survey respondents. Office products businesses reported the lowest land areas. Table 2, below, shows the total results of the cross-tabulation.

**Table 2. Land Area by Business Type**

Business Type <sup>1</sup>	Number of Respondents	Land Area (acres)	
		Mean	Median
Fabrication	5	9.1	1.3
Construction Related	12	7.6	1.0
Education/Non-profit	1	6.5	6.5
Import/Export	2	6.3	0.7
Warehouse/Distribution	7	3.7	2.0
Marine Related	8	3.3	2.3
Signage	3	2.7	0.4
Manufacturing/Repair	10	1.7	1.0
Sales	1	1.0	1.0
Auto Related	5	0.7	0.5
Other	1	0.5	0.5
Art Related	1	0.2	0.2
Office Products	0	0.0	0.0

<sup>1</sup> Business Type data from question

**Figure 4. Building Space**



Building space data were cross-tabulated with business type data from Question 1. As shown in Table 3, import/export businesses had large mean building spaces, but a relatively low median. This indicates that there are few firms with large buildings, but most have relatively small buildings. Warehouse/distribution and fabrication business had the highest mean and median building spaces, indicating that, in general these operations use the largest buildings. Office products businesses reported the lowest land areas. Table 3, below, shows the total results of the cross-tabulation.

**Table 3. Building Space by Business Type**

Business Type <sup>1</sup>	Number of Respondents	Building Space (sq. ft.)	
		Mean	Median
Import/Export	4	104,038	6,825
Warehouse/Distribution	17	74,022	24,000
Fabrication	6	63,005	27,500
Construction Related	17	36,190	12,000
Sales	7	29,229	20,000
Marine Related	9	24,684	16,000
Manufacturing/Repair	14	23,900	16,500
Signage	7	22,129	6,000
Art Related	2	7,000	7,000
Education/Non-profit	4	6,825	7,750
Auto Related	6	5,933	4,500
Other	2	5,050	5,050
Office Products	1	2,500	2,500

<sup>1</sup> Business Type data from question

## Question 6: Floor Space Usage

This question asked respondents how floor space was used. Respondents were asked to estimate what percentage of the space was used for; Manufacturing/Industrial/Repair, Warehouse/Storage, Retail/Showroom, Office and Other. Not every respondent provided a percentage for each category. Table 4 displays the total number of respondents in each of the five categories. Office was the largest group, 96 respondents indicated that they had some portion of their floor space used for office purposes, although respondents indicated that the office comprised a small portion of their building area. Other major uses were Warehouse/Storage (70 respondents) and Manufacturing/Industrial/Repair (53 respondents).

Grouping them into percentage of floor space categories further refined these responses. These responses indicate that the majority of businesses in the industrial area use the bulk of their space for Warehouse/Storage and Manufacturing/Industrial/Repair. In the 75-100 percent group, responses were dominated by Warehouse/Storage (30 respondents), and Manufacturing/Industrial/Repair (26 respondents). Another 13 and 10 respondents said they use 50-75 percent of their space for Manufacturing/Industrial/Repair and Warehouse/Storage, respectively. In the 25-50 percent group Warehouse/Storage (13) and Office (12) makes up the most responses. In the smallest group (0-25 percent), Office had the most responses with 72.

**Table 4. Floor Space Usage**

Uses	Floor Space Usage Categories				Total Number of Responses
	0-25 percent	25-50 percent	50-75 percent	75-100 percent	
Office	72	12	5	7	96
Warehouse / Storage	17	13	10	30	70
Manufacturing / Industrial / Repair	7	7	13	26	53
Retail / Showroom	10	2	1	3	16
Other	2	0	2	1	5

### **Question 7: Annual Gross Business Revenue**

Question 7, asked respondents what the approximate annual gross business revenue provided from the site was. The majority (40 percent) of respondents answered \$1 to 5 million, while 33 percent answered less than \$1 million, and 18.3 percent said \$5-20 million. Very few people reported gross business revenue between \$20-50 million (6 percent) and over \$50 million (2 percent).

### **Question 8: Business Revenue in the Last Three Years**

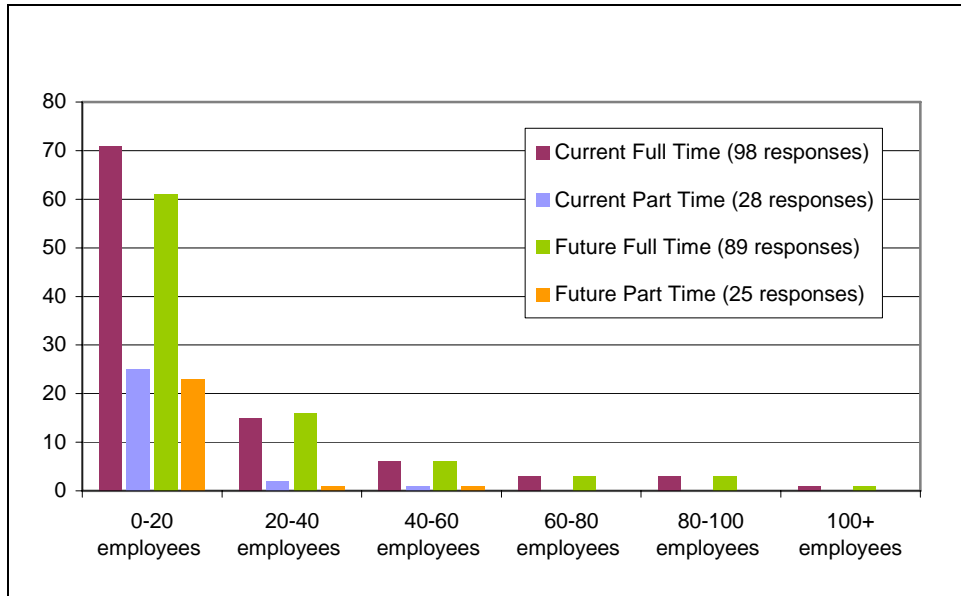
In Question 8, respondents were asked if business revenues have increased, decreased, or stayed the same, in the last three years. Most (66 percent) of respondents reported that business revenue has increased. Twenty-five percent reported that business has decreased and 8 percent reported that business has stayed the same.

## **Employee Information**

### **Question 9: Employees Current and Future**

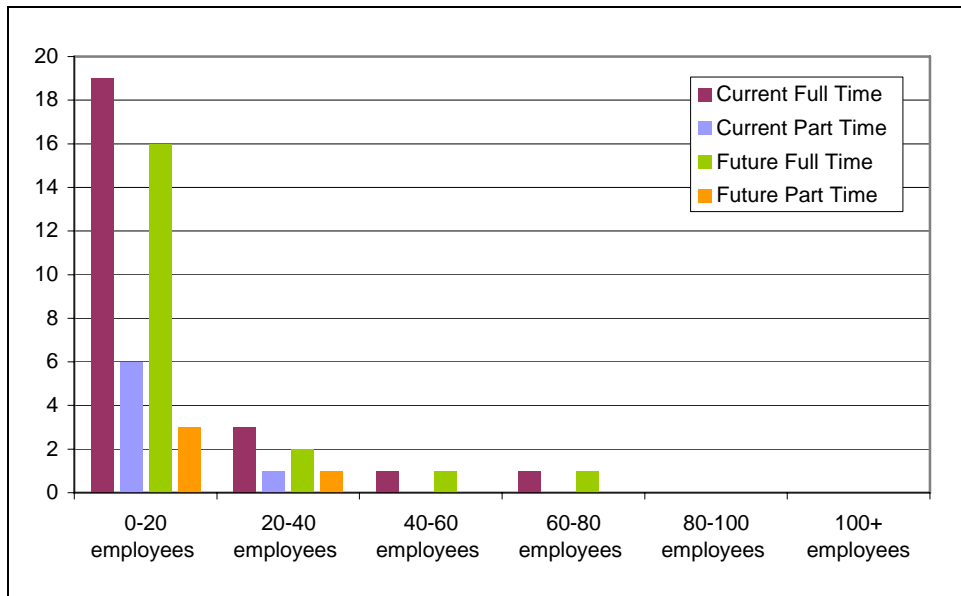
Question 9 was a two-part question, the first part asked respondents how many full-time and part-time employees currently work at their locations, and the second part asked how many were anticipated in three to five years. Results for current full-time, part-time, future full-time and future part-time are summarized in Figure 5. This figure might be a little misleading because it displays direct responses rather than percentage of response. This was done because not all those surveyed responded to each question. Seventy respondents (out of 98) said they had 0 to 20 current full-time employees. Sixty respondents (out of 89) estimated that they would have between 0 and 20 future full-time employees. Twenty-five respondents (out of 28) said they had 0 to 20 current part-time employees. Twenty-three respondents (out of 25) estimated that they would have between 0 and 20 future part-time employees. In general the figure shows that the majority of business surveyed are small to mid-sized employers.

**Figure 5. Employees Current and Future**

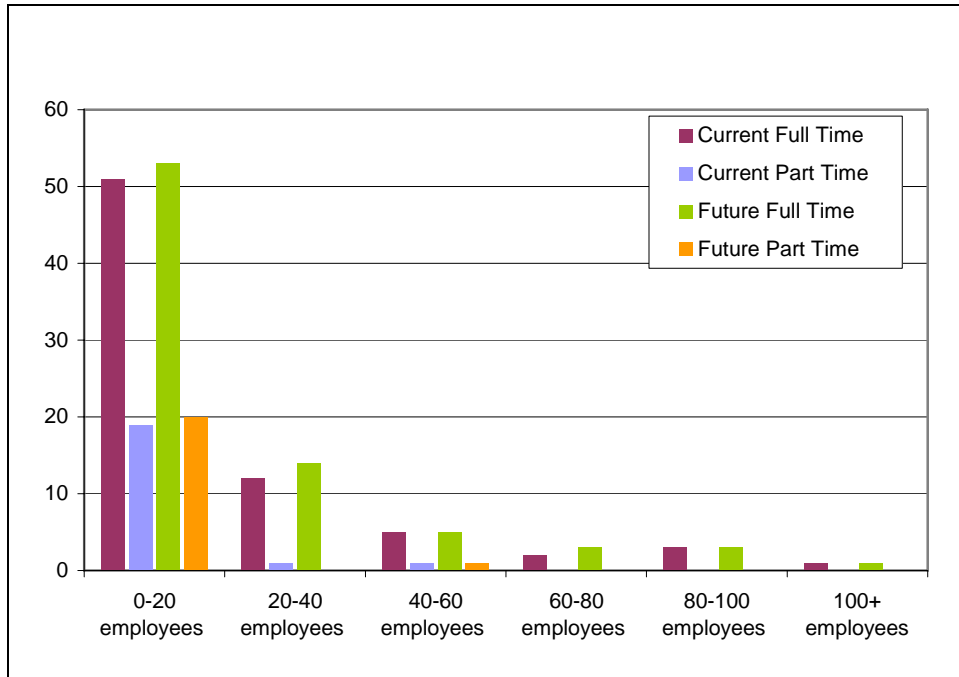


Employment in the BINMIC and Duwamish areas is displayed in Figure 6 and 7. The BINMIC is a much smaller geographical area with fewer firms and/or less responses. In general the businesses have between 0 to 40 employees, with a few reporting between 40 to 80 employees. On the other hand, the Duwamish comprises a larger geographic area with more firms. Responses were similar with the large majority having between 0 to 40 employees. In the BINMIC and the Duwamish area median current full-time employees were 6 and 12, respectively. Generally, the firms in the Duwamish are larger and employ more people, than those in the BINMIC.

**Figure 6. Employees Current and Future – BINMIC**



**Figure 7. Employees Current and Future –Duwamish**



These data were also cross-tabulated with the data on business type from Question 1. The results shown in Table 5 indicate that construction, sales, and marine-related businesses included in the survey have the highest average number of employees, but that sales and marine-related business had the higher median number of employees. The relatively small median number of employees and large average number for construction-related businesses indicate that there are many smaller firms and few very large firms. In general sales, marine-related, import/export, and office products were largest employers in the surveyed group. The smallest employers were art and auto-related business. Table 5, below, shows the total results of the cross-tabulation.

**Table 5. Business Type by Number of Employees**

Business Type <sup>1</sup>	Number of Respondents	Number of Employees	
		Mean	Median
Construction Related	19	44	10
Sales	9	31	21
Marine Related	12	25	18
Warehouse/Distribution	17	23	13
Fabrication	6	22	12
Import/Export	4	21	15
Manufacturing/Repair	11	20	10
Office Products	2	15	15
Education/Non-profit	4	13	13
Auto Related	7	12	9
Signage	7	10	11
Art Related	2	2	2
Other	2	2	2

<sup>1</sup> Business Type data from question 1



## Question 10: Percentage of Employees Who Live in Seattle.

This question asked respondents to estimate the percentage of employees who live in the city of Seattle. The largest group of respondents (49 percent) said that 0 to 25 percent of their employees live in Seattle. Twenty-one percent of respondents reported that 75 to 100 percent of employees live in Seattle. Approximately, 15 and 14 percent of respondents had between 25 to 50 percent and 50 to 75 percent of employees living in Seattle, respectively. Many respondents stated that the cost of housing was the main reason more of their employees live outside of Seattle.

## Industry Linkages

### Question 11: Primary Vendors

Question 11 asked respondents to list their three primary vendors. The survey asked for vendors name, products or services they supply, the primary location of vendor, and the method of shipment. Vendor names were too unique to display in any meaningful way. Products and services were grouped by location and are displayed in Table 6.

**Table 6. Vendor Products or Services**

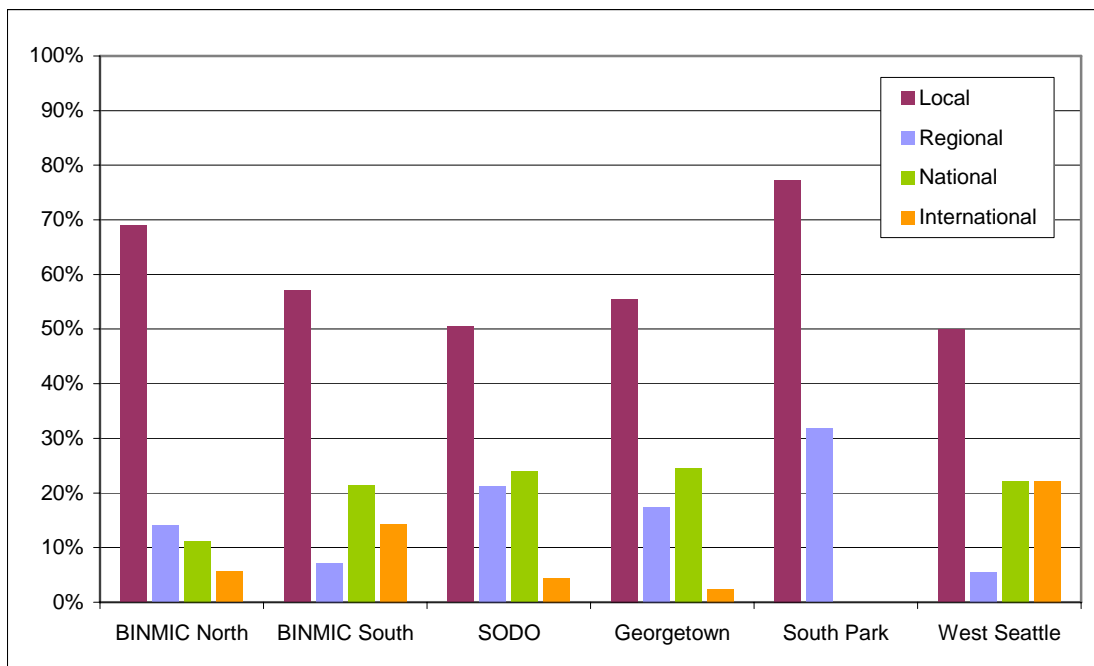
BINMIC North	BINMIC South	SODO	Georgetown	South Park	West Seattle
Canning supplies	Clothing	Batteries & supplies	Adhesives	Brass	Baking Products
Building supplies	Lubricants	Communications parts	Alcohol	Copper	Barge maintenance
Auto Parts	Raw material for signage	Diesel fuel	Athletic flooring	Electrical	Engines
Boat sling equipment	Toys	Dry Goods	Auto parts	Lumber	Espresso equipment
Chemicals		Eggs	Carpet	Re-conditioned drums	Flour
Concrete forming accessories		Envelopes	Cartons	Steel	Food
Crafts and gift imports		Equipment rental	Clay	Trailers	Fuel
Fabrics/Sewing/Aluminum		Flash valve	Construction supplies		Moorage/storage
Fishing vessels		Forms / Printing	Corrugated boxes		
Freight shipping		Freight	Dairy		
Fuel		Glass	Electric Parts		
Glass		Grain elevators	Energy		
Heating oil & petroleum		Lumber	Equipment		
Manual labor		Materials/Fixtures	Equipment services		
Marine Supply		Metal - raw materials	Fans		
Plastic Containers		Paper & office supplies	Fasteners		
Plastic sheeting		Plastics	Flour		
Pottery supply products		Printing	Foam		
Pumps		Promotional Supplies	Forklifts		
Raw materials for wiring		Propane	Furniture		
Ship building materials		Rail Agent	Hardware		
Steel		Repairs	Industrial supplies		
Textiles		RFG Material	Ladders		
Wire and rope		Rigging	Levels		
		Safety equipment	Liquid chemicals		
		Sign materials	Mailing services		
		Steel	Office supplies		
		Trucking	Paint/Supplies		
		Variety of needed materials	part fabrication		

**Table 6. Vendor Products or Services (continued)**

BINMIC North	BINMIC South	SODO	Georgetown	South Park	West Seattle
		Vegetable Wholesale parts Wine Imports Wood	Pipe fittings Polyethylene bags Safety equipment Scrap metal Sign materials Steel Sundries Variety of hand and power tools Vinyl graphic materials Welding equipment Wood		

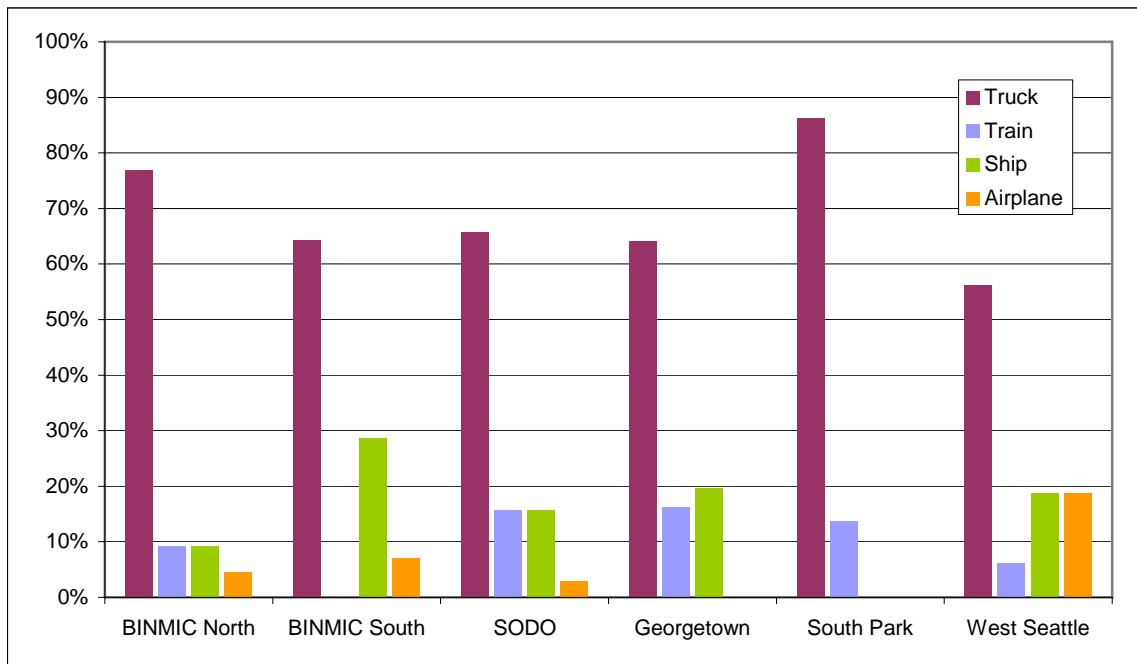
Vendor locations were categorized into, local, regional, national, and international. Fifty-one percent of respondents listed their primary suppliers as being located locally. The remainders were, 20 percent national, 18 percent regional, and 5 percent international. To further analyze results, vendor location was then divided by business location (Figure 8). It is important to note that each area did not have the same number of responses. Out of 366 total responses, BINMIC North had 71 responses, BINMIC South had 14 responses, SODO had 113 responses, Georgetown had 126 responses, South Park had 24 responses, and West Seattle had 18 respondents. The majority of vendors were local for all locations. Respondents in West Seattle had some of the fewest responses but cited more international vendors. This may be explained by the shipping operations located on Harbor Island.

**Figure 8. Vendor Location by Business Location**



Method of shipment was classified as truck, train, ship, or airplane. The majority (68 percent) of businesses said that goods were brought by truck, 15 percent by ship, 13 percent by train, and 3 percent by airplane. Shipment method results were divided into business location (Figure 9). Responses rates for shipment method were similar to those for vendor location, but varied slightly. Out of 336 total responses, BINMIC North had 71 responses, BINMIC South had 14 responses, SODO had 113 responses, Georgetown had 126 responses, South Park had 24 responses, and West Seattle had 18 responses. In BINMIC South there was a higher percentage of goods sent by ship, but this percentage only represents 3 responses. Generally, most industrial businesses in Seattle have vendors located locally and those goods are transported by truck.

**Figure 9. Vendor Shipment Method by Location**



## Question 12: Primary Customers

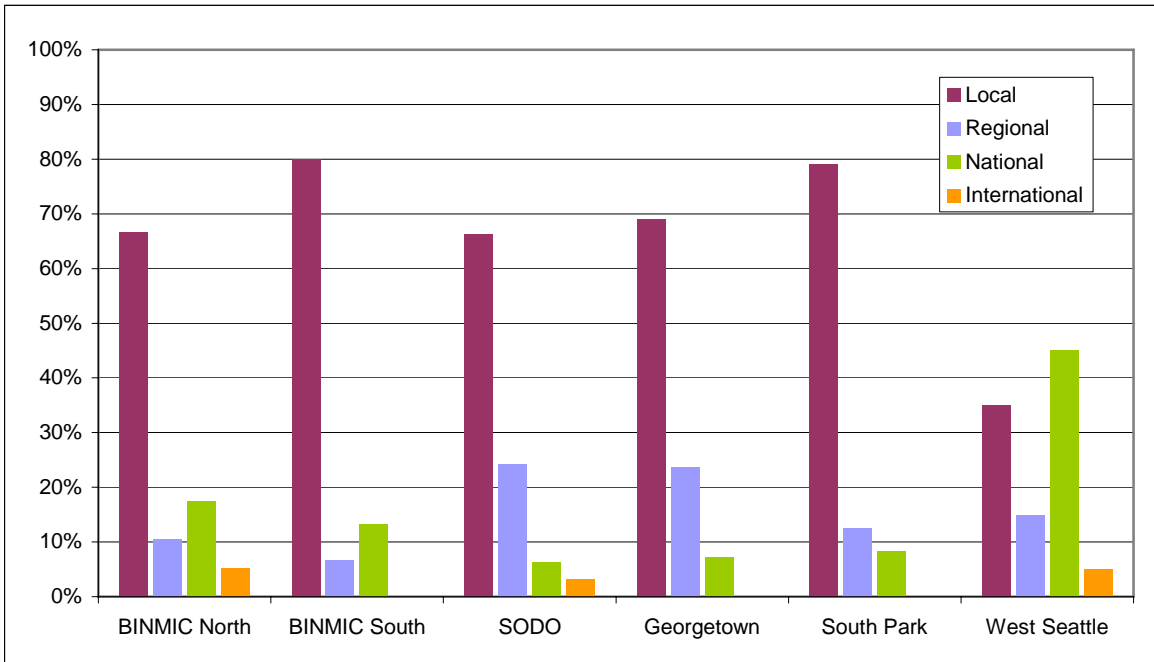
Question 12 asked respondents to list their three primary customers. They were asked to give the name of the customer, products or services purchased, customer location, and method of shipment. Products and services were grouped by location and are shown in Table 7.

**Table 7. Products and Services Purchased by Customers**

<b>BINMIC North</b>	<b>BINMIC South</b>	<b>SODO</b>	<b>Georgetown</b>	<b>South Park</b>	<b>West Seattle</b>
Architectural services	Cloths	Animal feed and processing	Alcohol	Electrical	Coffee / espresso retail
Automotive Lubricants	Drugstore Merchandise	Auto repair	Boxes, bags, etc.	Steel	Bunker fuel transport
Chevron	Lubricants	Cut and formed metal	Bread/Bakery products		Oil transport
Cloths	Merchandise	Desserts	Cabinets & furniture		Port Assist
construction services	Signs	Fixtures, racks, cabinets	Cold Storage		
Consulting		Formed metal	Construction supply warehouse		
Crab/Fish		Lock Boxes	Engraving		
Crafts and gift imports		Machine work	Equipment repair		
design services		Mailing	Fasteners		
Drugstore Merchandise		Marine services	Flooring		
Fishing/other marine activities		Metal fabricated parts	Furniture		
Fuel		Moldings, windows, doors	Government		
Heating oil & petroleum, HVAC service		Office supplies	Installed Floor		
Interior design services		Promotional products	Installation		
Lubricants		Refrigeration equipment	Janitorial supplies		
Marine tug and launch services		Roofing and materials	Marine ship service		
Medical care		Safety equipment	Paper		
Merchandise		Signs	Processed scrap metal		
Recreational		Store products	Safety equipment		
repair		Vegetable	Sign materials		
Seafood		Wine	Stair design & installation		
Sell art			Tubes		
Signs			Welding supplies		
Snap ties					
Tanning					
Yachts					

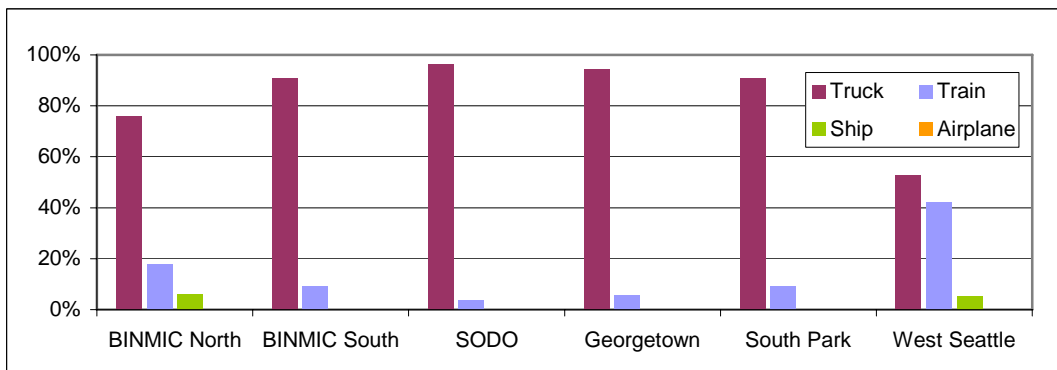
Sixty-six percent of respondents said that their customers were local, 19 percent were regional, 12 percent were national, and 2 percent were international. Customer location was then divided by business location for further analysis (Figure 10). Out of 303 total responses, BINMIC North had 57 responses, BINMIC South had 15 responses, SODO had 95 responses, Georgetown had 97 responses, South Park had 24 responses, and West Seattle had 20 responses. Most business locations have their customers located locally with the exception of West Seattle where the majority (45 percent) is located nationally. The West Seattle location includes Harbor Island where container ships bring goods that are transported nationally.

**Figure 10. Customer Location by Business Location**



Based on responses, method of shipment was classified as, truck, train, ship, or airplane. The vast majority (88 percent) of businesses transport to customers by truck, while 10 percent is by train, 2 percent by ship, and 0 percent by airplane. Shipment method results were divided into business location for further analysis (Figure 11). Out of 265 total responses, 50 were from BINMIC North, 11 were from BINMIC South, 81 were from SODO, 90 were from Georgetown, 11 were from South Park, and 19 were from West Seattle. Most respondents in each location said that their products were delivered via truck. In West Seattle 42 percent of goods were delivered via train. These figures illustrate that the majority of customers are local and shipment of goods is done via trucks. An exception are those businesses located in West Seattle whose customers are more national, where goods are frequently shipped via train.

**Figure 11. Customer Shipment Method by Business Location**



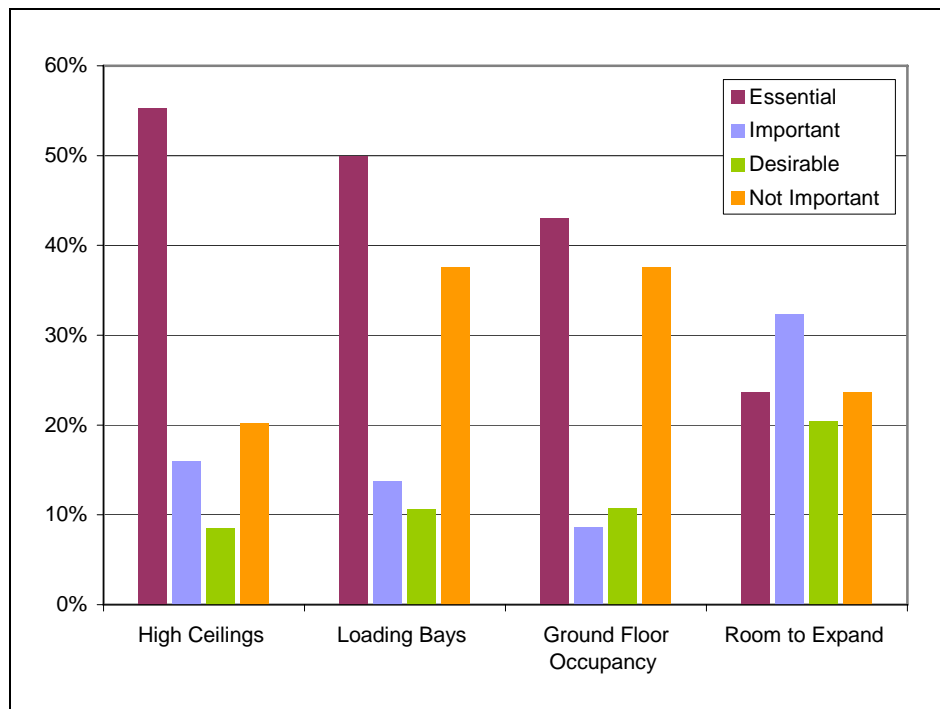
# Location Factors

## Question 13: Factors in Deciding on Operating Location

This question asked respondents to indicate how important different factors were when deciding on an operating location. The questions were grouped into five categories; space characteristics, site characteristics, labor, business links, and transportation. Respondents were asked to rank each question as, essential, important, desirable, or not important in deciding on operating location. As a follow-up question respondents were asked how satisfied they were with each factor.

The first group of questions regarded space characteristics. Respondents were asked to rank the importance of; high ceilings, loading bays, ground floor occupancy, and room to expand (Figure 12). High ceilings had the most definitive response with 55 percent saying that they were essential. Those that said high ceilings were either essential or important compose 71 percent of responses. Loading bays were either essential (50 percent) or not important (37.6 percent). Responses for ground floor occupancy was also either essential (43 percent) or not important (38 percent) when deciding on operating location. Room to expand had almost an even distribution with regards to the four categories. The highest percentage (33 Percent) of respondents said that room to expand was important.

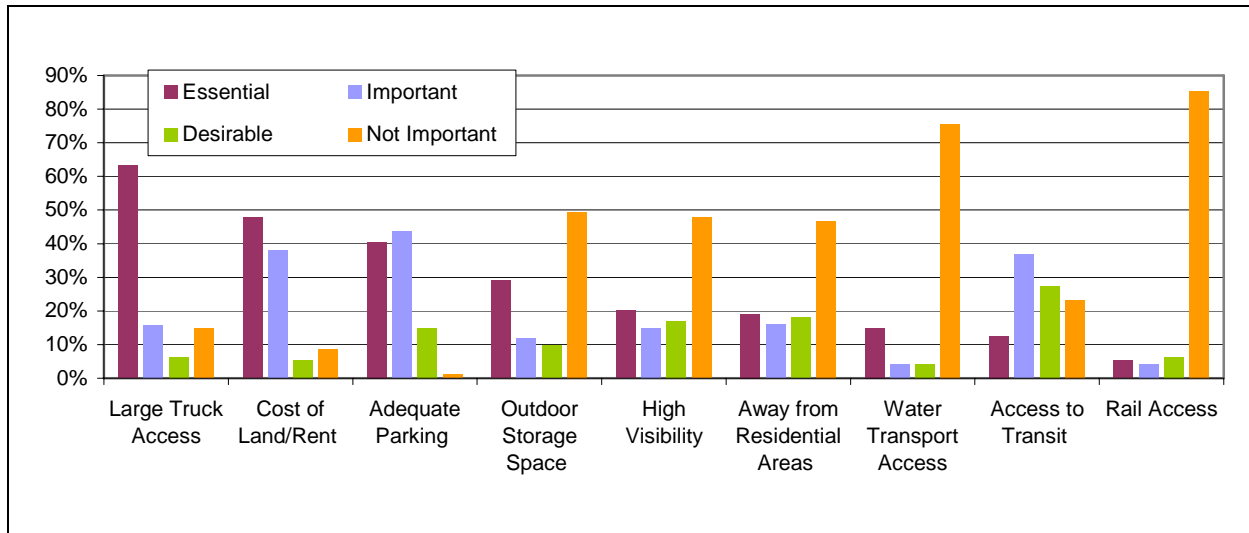
**Figure 12. Space Characteristics**



The next group of questions focused on site characteristics and included; large truck access, cost of land/rent, adequate parking, outdoor storage space, high visibility, distance from residential areas, water transport access, access to transit, and rail access (Figure 13). Sixty-three percent of respondents said that large truck access was essential and 16 percent said it was important for operation. Cost of land or rent was rated as essential by 48 percent and important by 38 percent of respondents. When asked if people were satisfied with the cost of land/rent most respondents stated that they were at the time when they

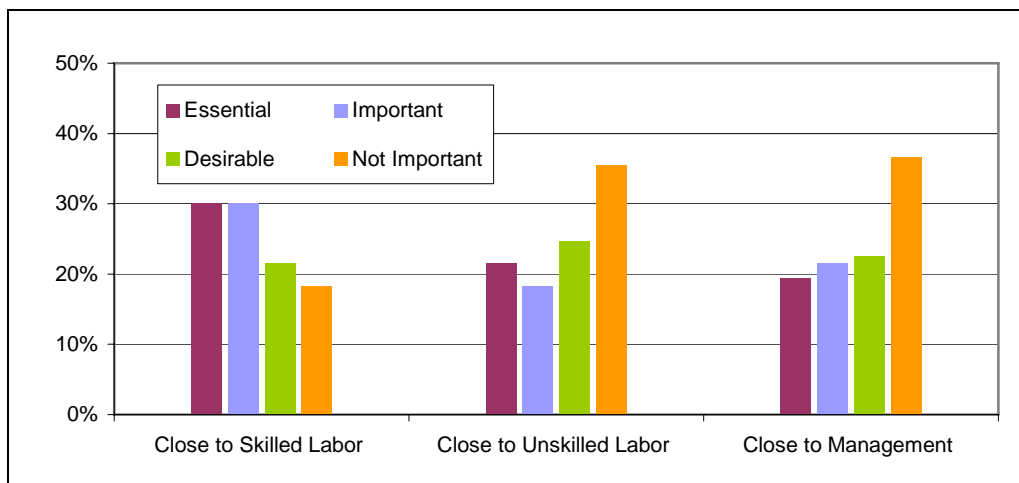
bought or negotiated their lease. Adequate parking was one of the most important factors with 40 percent saying it was essential and 44 percent saying it was important, for a combined total of 84 percent. When respondents were asked how satisfied they were, the majority said that they were not satisfied; especially those located near the stadiums. Again, when respondents were asked to rate their satisfaction, the majority said that large truck access was a major issue due to traffic congestion and street parking.

**Figure 13. Site Characteristics**



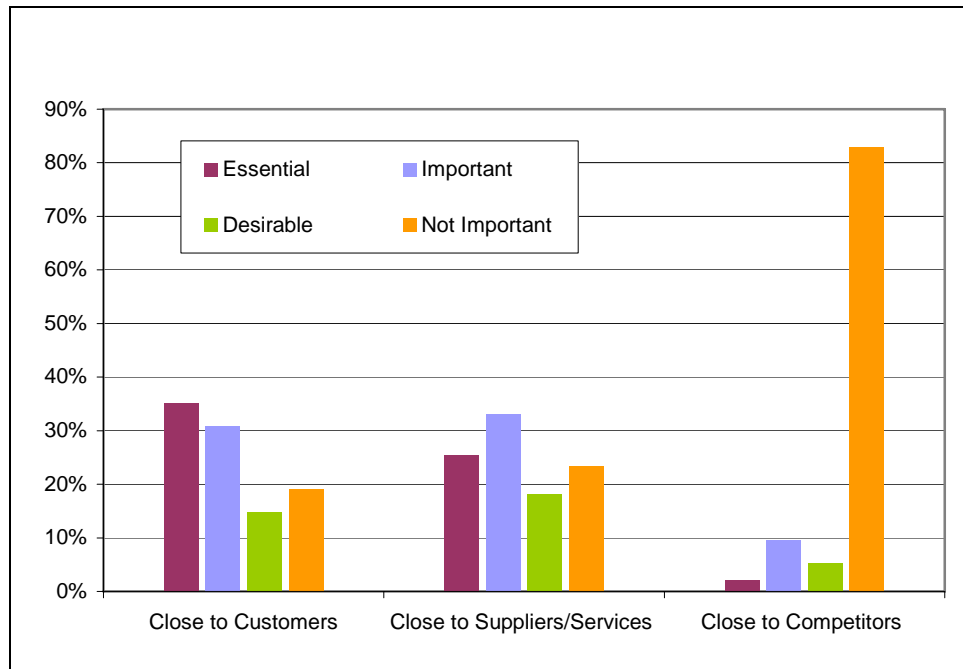
The third group of questions addressed the labor pool in determining operating location. The factors included being close to skilled labor, unskilled labor, and management (Figure 14). Being close to skilled labor was the most important, with 60 percent stating that it was essential or important. When respondents were asked if proximity of management was a factor in determining operating location, the largest group (37 percent) said it was not important. Proximity to unskilled labor was not an important (36 percent) factor when determining location. When asked, most respondents said that they were satisfied with the labor pool in their current location.

**Figure 14. Labor Characteristics**



The next group of questions focused on business links and included, being close to customers, close to suppliers or services, and close to competitors (Figure 15). The results indicate the majority of respondent's felt that it was essential (35 percent) or important (31 percent) to be close to customers. Fewer people felt that it was essential (26 percent) or important (33 percent) to be close to suppliers or services. Being close to competitors was seen as not important by 83 percent of respondents. Most people were satisfied with their current situation with regard to business links.

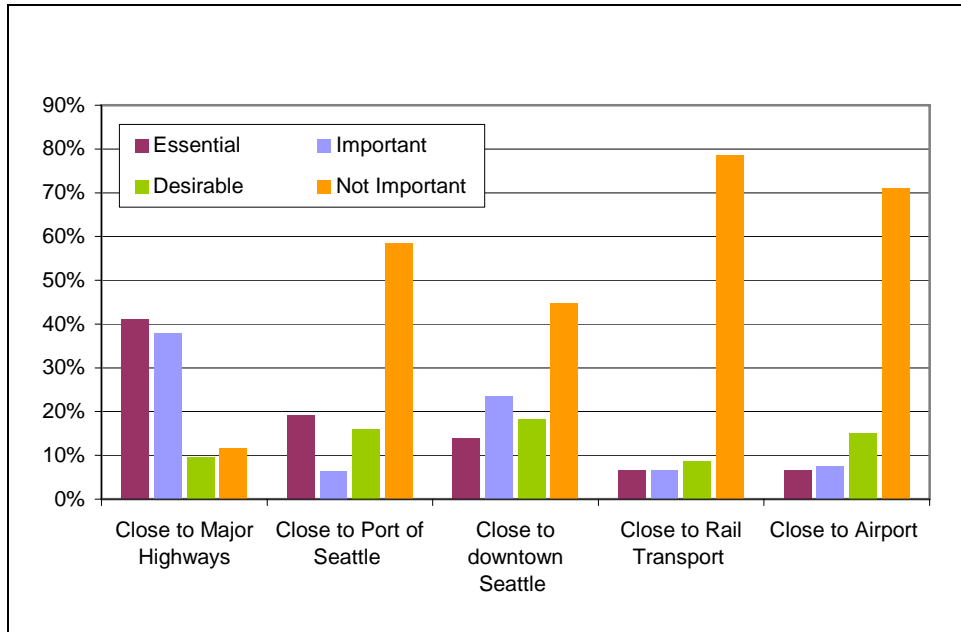
**Figure 15. Business Links**



The final group of questions was on transportation issues and included, being close to major highways, the Port of Seattle, downtown, rail transport, and the airport (Figure 16). Being close to major highways was essential (41 percent) or important (38 percent) when deciding on location. Most people said that they were currently satisfied with proximity to highways but expressed concern about the Viaduct. Being close to the Port of Seattle was not important for most people (59 percent) but essential (19 percent) for others. The majority of people surveyed said that being close to downtown Seattle was not important (45 percent), and proximity to rail transport was not important (79 percent). Many people said that being near rail transport was actually a negative impact on their business because of transportation delays. Others were indifferent but did not utilize rail transportation in their operation. Being close to the airport was only essential to 7 percent of respondents.



**Figure 16. Transportation Characteristics**



**Question 14: Relocate from Elsewhere**

Question 14 asks about the previous location. Seventy (70) percent of respondents said that they had moved, while the remainder said that they had not. Most respondents said that they had moved from within the Seattle industrial area. Most of the relocations were due to business expansion, better facilities, or cheaper land/rent. These results correlate with those of Question 2.

**Question 15: Why Was Present Location Chosen**

As a follow up to Question 14, respondents were asked why their present location was chosen. This was an open-ended question. Answers varied widely but responses have been grouped into categories including, cost, location, space/amenities, ingress/egress, and other. Forty-six percent of respondents said that the decision was based mostly on locational variables, including; proximity to customers, suppliers and competitors; another 24 percent said that cost was the biggest factor, and 18 percent said that space/amenities was most important in determining location.

**Question 16: Advantages of Operating at Current Location**

This question asked respondents what the primary advantages of operating at their current location was. Responses to this question closely mirror those given for Question 15. Generally, they can be grouped into, location, space or amenities, cost, ingress and egress. The majority of responses related to location, with space or amenities as the second most cited item.

## **Question 17: Disadvantages of Operating at Current Location**

This question asked respondents what the primary disadvantages of operating at their current location was. Responses were varied but can be grouped into, traffic congestion, lack of space or amenities, cost, parking, ingress and egress. The most common responses dealt with traffic; the second most common was space or amenities, followed by cost.

## **Business Plans**

### **Question 18: Life of Existing Facility**

Question 18 asked respondents what the anticipated remaining useful life of the existing facility was. Responses were classified as unknown, 0-5 years, 5-10 years, 10-25 years, 25-50 years, 50-100 years, and indefinite. Thirty-eight percent of respondents said that the life of the existing facility was indefinite, while 27 percent reported that it was unknown. Twenty-two percent of respondents were split reporting that facilities would last 0 to 5 years and 5 to 10 years.

### **Question 19: Plans for Present Location**

This question asked about plans for the present location. Five options were given: no change, close, downsize, move, or expand. Forty-eight percent of respondents said that no change would occur, 28 percent said that operations would likely expand, and 20 percent said that the business would likely move. The remaining respondents said they would downsize (2 percent) or close (1 percent).

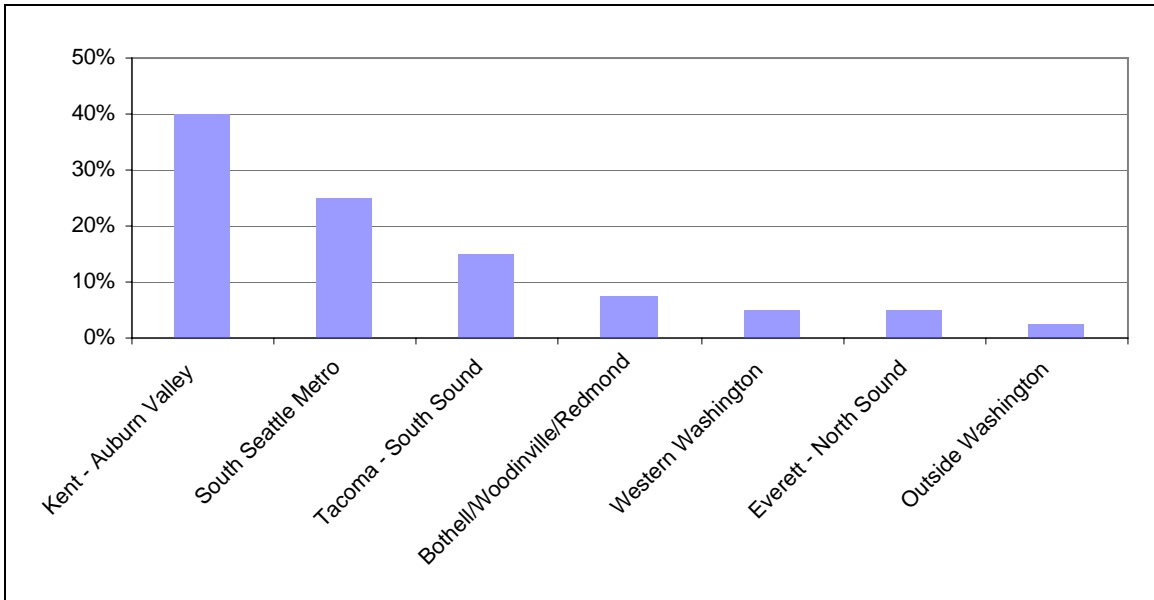
### **Question 20: Location of New Facility**

Question 20 asked if the company were to consider a new facility what areas would they consider. Three options were given: city of Seattle, Seattle metro area, or outside Seattle metro area. The majority of respondents (53 percent) reported that if they were to relocate they would relocate within the city of Seattle. The remainder said Seattle metro (23 percent) and outside Seattle metro (24 percent).

### **Question 21: New Facilities Outside Seattle**

As a follow up to Question 20, Question 21 asks respondents if they were considering areas outside Seattle, what areas would be considered and why (Figure 17). For the purposes of analysis answers were grouped into seven categories. The categories include; the Kent-Auburn valley, south Seattle metro, Bothell/Woodinville/Redmond, Western Washington, Tacoma and the South Sound, Everett and the North Sound, and areas outside Washington. Forty percent of respondents said that they would likely move to the Kent-Auburn valley, 25 percent said south Seattle metro, 8 percent said Bothell, Woodinville, or Redmond, 5 percent said Western Washington, 15 percent said Tacoma or the south Sound, 5 percent said Everett or the north Sound, and 5 percent said they would relocate outside Washington. The majority of respondents cited traffic congestion, land regulation, and cost of land, as the reasons for considering areas outside of Seattle.

**Figure 17. New Facilities Outside Seattle**



### **Question 22: What Governmental Actions Would Help Operations**

Question 22, asked what governmental actions could help facilitate the company’s existing operations and/or future plans. The largest group (18 percent) of those surveyed said that the government should lower taxes to assist in lowering the cost of doing business. Responses also included comments about traffic, congestion, and parking, as well as badly needed infrastructure improvements.

### **Question 23: Comments for the City of Seattle**

This question asked: “Do you have any suggestions or comments that you would like to communicate to the City of Seattle?” These responses were very specific to each business but in general mirrored those of Question 22.

# Summary

This section summarizes the major findings of the phone survey. The industrial businesses participating in this survey tended to be relatively small in terms of employees (median number of full time employees = 10.6), land area (median = 1 acre), and building space (median = 12,500 square feet). As stated above, because this was not a statistically valid survey we do not know if the results can be applied more broadly to the city's industrial businesses.

Based on the responses from the Industry Linkages section (questions 11 and 12), most of the respondent companies operate locally, with local suppliers (57 percent) and local customers (66 percent). The survey participants also tend to lease rather than own (68 vs. 32 percent). Most of the businesses that had moved or changed location had relocated from within the Seattle industrial area. Companies were partial to operating in Seattle and most said that if they were to relocate they would stay within the city (53 percent). The primary reasons for companies looking to relocate were taxes, operational cost, and traffic congestion.

When deciding on operating location respondents listed several factor as being important. With regards to site and space characteristics, the most common responses were access for large trucks, adequate parking, cost of land/rent, and high ceilings. With regards to transportation, businesses said it was essential or important to be close to major highways.

Many of the responses were divided by location to further analyze results. In most instances the differences were fairly minor but some unique trends were identifiable. The percentage of marine-related businesses was higher in the BINMIC than in the industrial area as a whole (16 vs. 11 percent). Businesses also tended to be smaller in lot size and building square footage in the BINMIC than in the industrial area as a whole.

Companies in the BINMIC had been located at their addresses longer and had a higher rate of ownership than in the industrial area as a whole. The BINMIC South sub-area businesses had a higher proportion of suppliers located nationally and internationally than the other sub-areas, and these goods were transported via ship more frequently than in the industrial area as a whole. Business in the Duwamish made up the majority of respondents so unique trends were harder to identify but in general, businesses were larger in terms of employment, lot size, and building size. In the West Seattle sub-area, businesses had a greater percentage of suppliers and customers located nationally and internationally.

The overwhelming concerns expressed by respondents had to do with traffic and congestion, parking, infrastructure, ingress and egress issues, and operational costs. The majority of respondents indicated that that Seattle traffic and congestion were inhibiting their operations and business productivity. Most of the respondents also expressed concern about parking in the industrial areas.

In particular, businesses in the stadium area said that parking was such an issue that during game days their operations essentially had to shut down. Respondents also expressed concern that parking and traffic congestion produced ingress/egress issues. Many businesses said that their pickup and delivery schedules were affected because trucks could not gain access to their locations. Finally, respondents said that the City did not have a clear understanding of business operating expenses, and that the taxes and fees assessed by the City created a hardship for operation.

# References

City of Seattle, 2005a. City of Seattle Industrial Land Study. August. Prepared by the Seattle Department of Economic Development and the Seattle Department of Planning and Development. Seattle, WA.

City of Seattle. 2005b. A Comparison of Industrial Land Strategies. November. Prepared by Seattle Planning Commission Staff. Seattle, WA.



# Appendix A

## Survey Instrument

**City of Seattle  
Industry Survey**

Name \_\_\_\_\_ Position \_\_\_\_\_  
Firm/Organization \_\_\_\_\_ Phone \_\_\_\_\_  
Address \_\_\_\_\_ Fax \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_ E-mail \_\_\_\_\_

**Background Information**

1. What are the primary goods and/or services that you manufacture/sell from this location?

\_\_\_\_\_  
\_\_\_\_\_

2. How many years has the company been located at this address? \_\_\_\_\_ years

3. Is the company an owner or a tenant at this location?

Owner \_\_\_\_\_ Tenant \_\_\_\_\_

4. Is this location a multi-tenant building?

Yes \_\_\_\_\_ No \_\_\_\_\_

5. Please estimate the current land area and building space at your site.

Land: \_\_\_\_\_ acres Building Space: \_\_\_\_\_ sq. feet

6. How is your floor space used? (Indicate % of total floor space)

Manufacturing/Industrial/Repair	_____%
Warehouse/Storage	_____%
Retail/Showroom	_____%
Office	_____%
Other	_____%
<b>TOTAL</b>	<b>100%</b>

7. What is the approximate annual gross business revenue provided from this site?

\_\_\_ Less than \$1 million    \_\_\_ \$1-\$5 million    \_\_\_ \$5-\$20 million  
\_\_\_ \$20-\$50 million                    \_\_\_ over \$50 million



8. In the last three years have business revenues:  
Increased \_\_\_\_\_ Decreased \_\_\_\_\_ Stayed the same \_\_\_\_\_

**Employee Information**

9. Approximately how many employees currently work at this location?

Full Time \_\_\_\_\_ Part Time \_\_\_\_\_

9a. How many employees do you anticipate at this location 3 to 5 years from now?

Full Time \_\_\_\_\_ Part Time \_\_\_\_\_

10. Please estimate the percentage of your employees who live in the city of Seattle  
\_\_\_\_\_%

**Industry Linkages**

11. Currently, who are your three Primary vendors?

	<u>Name of Vendor</u>	<u>Products/Services</u>	<u>Primary Location of Vendor</u>	<u>Method of Shipment Used</u>
A.	_____	_____	_____	_____
B.	_____	_____	_____	_____
C.	_____	_____	_____	_____

Recent and anticipated trends:

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12. Currently, who are your three primary customers?

	<u>Name of Customer</u>	<u>Products/Services Purchased</u>	<u>Location</u>	<u>Primary Shipment Method</u>
A.	_____	_____	_____	_____
B.	_____	_____	_____	_____
C.	_____	_____	_____	_____

Recent and anticipated trends:

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## **Location Factors**

13. Please indicate how important each factor is to you when deciding on an operating location for a business. Circle one number for each factor.

	<b>Essential</b>	<b>Important</b>	<b>Desirable</b>	<b>Not Important</b>	<b>Satisfied</b>		
<b>Space Characteristics</b>							
Room to expand	4	3	2	1	Yes	No	N/A
Ground floor occupancy	4	3	2	1	Yes	No	N/A
Loading bay	4	3	2	1	Yes	No	N/A
High ceilings	4	3	2	1	Yes	No	N/A
<b>Site Characteristics</b>							
Cost of land/rent	4	3	2	1	Yes	No	N/A
Outdoor storage space	4	3	2	1	Yes	No	N/A
Adequate parking	4	3	2	1	Yes	No	N/A
Access to transit	4	3	2	1	Yes	No	N/A
High visibility	4	3	2	1	Yes	No	N/A
Large truck access	4	3	2	1	Yes	No	N/A
Rail access	4	3	2	1	Yes	No	N/A
Water transport access	4	3	2	1	Yes	No	N/A
Away from residential areas	4	3	2	1	Yes	No	N/A
<b>Labor</b>							
Close to management	4	3	2	1	Yes	No	N/A
Close to skilled labor	4	3	2	1	Yes	No	N/A
Close to unskilled labor	4	3	2	1	Yes	No	N/A
<b>Business Links</b>							
Close to customers	4	3	2	1	Yes	No	N/A
Close to suppliers/services	4	3	2	1	Yes	No	N/A
Close to competitors	4	3	2	1	Yes	No	N/A
<b>Transportation</b>							
Close to downtown Seattle	4	3	2	1	Yes	No	N/A
Close to major highways	4	3	2	1	Yes	No	N/A
Close to rail transport	4	3	2	1	Yes	No	N/A
Close to Port of Seattle	4	3	2	1	Yes	No	N/A
Close to airport	4	3	2	1	Yes	No	N/A

14. Did you move to this location from elsewhere?

Yes \_\_\_\_\_ No \_\_\_\_\_

If you answered YES:

Where did you move from? \_\_\_\_\_

14. Why was your present location chosen?

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15. Currently, what are the primary *advantages* of operating at your present location?

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16. Currently, what are the primary *disadvantages* of operating at your present location?

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17. What is the *anticipated* remaining useful life of existing facilities?

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**Business Plans**

18. What are your plans for your present location?

No Change \_\_\_\_\_ Close \_\_\_\_\_ Downsize \_\_\_\_\_  
Move \_\_\_\_\_ Expand \_\_\_\_\_

19. If your company were to consider a new facility, where would this investment most likely occur?

City of Seattle \_\_\_\_\_

Seattle metro area \_\_\_\_\_

Outside Seattle metro area \_\_\_\_\_

20. If you were to consider areas outside of Seattle, what areas would be considered and why?

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21. What governmental actions could help facilitate your company's existing operations and/or future plans?

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22. Do you have any suggestions or concerns that you would like to communicate to the city of Seattle?

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23. Is there anyone else we should contact?

Name \_\_\_\_\_ Firm/Organization \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

# Appendix B

## Survey Responses

# Short Answer Question Responses

## Task 2. Survey Summary Report

Total Surveys  
Completed:

**102**

2. How many years has the company been located at this address? Total: **101**

0-5 years: <b>26</b>	16-20 years: <b>12</b>	31-35 years: <b>6</b>
6-10 years: <b>15</b>	21-25 years: <b>3</b>	36-40 years: <b>5</b>
11-15 years: <b>11</b>	26-30 years: <b>7</b>	40+ years: <b>16</b>

3. Is the company an owner or a tenant at this location? Owner: **32.4** %    Tenant: **67.6** %

4. Is this location a multi-tenant building? Yes: **50.0** %    No: **50.0** %

5. Please estimate the current land area and building space at your site.

Land:	Less than 1 acre: <b>22</b>	5-10 acres: <b>6</b>	Total: <b>56</b>
	1-3 acres: <b>18</b>	10-20 acres: <b>3</b>	
	3-5 acres: <b>4</b>	20+ acres: <b>3</b>	

Building Space:	Less than 1000 sq.ft.: <b>5</b>	10,000 - 25,000 sq.ft.: <b>25</b>	Total: <b>96</b>
	1000 - 5000 sq.ft.: <b>20</b>	25,000 - 50,000 sq.ft.: <b>14</b>	
	5000 - 10,000 sq.ft.: <b>17</b>	More than 50,000 sq.ft.: <b>15</b>	

6. How is your floor space used?:	0-25%	25-50%	50-75%	75-100%	
Manuf/Indust/Repair:	<b>7</b>	<b>7</b>	<b>13</b>	<b>26</b>	Total: <b>53</b>
Warehouse/Storage:	<b>17</b>	<b>13</b>	<b>10</b>	<b>30</b>	Total: <b>70</b>
Retail/Showroom:	<b>10</b>	<b>2</b>	<b>1</b>	<b>3</b>	Total: <b>16</b>
Office:	<b>72</b>	<b>12</b>	<b>5</b>	<b>7</b>	Total: <b>96</b>
Other:	<b>2</b>	<b>0</b>	<b>2</b>	<b>1</b>	Total: <b>5</b>

7. What is the approximate annual gross business revenue provided from this site? Total: **82**

Less than \$1 million: <b>32.9</b> %	\$5-\$20 million: <b>18.3</b> %	Over \$50 million: <b>2.4</b> %
\$1-\$5 million: <b>40.2</b> %	\$20-\$50 million: <b>6.1</b> %	

8. In the last three years have business revenues: Total: **97**

Increased: <b>66.0</b> %	Decreased: <b>8.2</b> %	Stayed the same: <b>25.8</b> %
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## Task 2. Survey Summary Report

Total Surveys  
Completed:

**102**

9. Approximately how many employees currently work at this location?

<u>Full Time</u>			Total:	<b>98</b>	
0-20 employees	<b>66.3</b> %	40-60 employees	<b>7.1</b> %	80-100 employees	<b>3.1</b> %
20-40 employees	<b>17.3</b> %	60-80 employees	<b>5.1</b> %	100+ employees	<b>1.0</b> %

<u>Part Time</u>			Total:	<b>28</b>	
0-20 employees	<b>89.3</b> %	40-60 employees	<b>0.0</b> %	80-100 employees	<b>0.0</b> %
20-40 employees	<b>7.1</b> %	60-80 employees	<b>3.6</b> %	100+ employees	<b>0.0</b> %

9a. How many employees do you anticipate at this location 3-5 years from now?

<u>Full Time</u>			Total:	<b>89</b>	
0-20 employees	<b>60.7</b> %	40-60 employees	<b>4.5</b> %	80-100 employees	<b>2.2</b> %
20-40 employees	<b>23.6</b> %	60-80 employees	<b>5.6</b> %	100+ employees	<b>1.1</b> %

<u>Part Time</u>			Total:	<b>25</b>	
0-20 employees	<b>92.0</b> %	40-60 employees	<b>0.0</b> %	80-100 employees	<b>0.0</b> %
20-40 employees	<b>4.0</b> %	60-80 employees	<b>4.0</b> %	100+ employees	<b>0.0</b> %

10. Please estimate the percentage of your employees who live in the City of Seattle.

				Total:	<b>77</b>
0-25%	<b>49</b>	25-50%	<b>15</b>	50-75%	<b>14</b>
				75-100%	<b>21</b>



## Task 2. Survey Summary Report

Total Surveys  
Completed:

**102**

13. Please indicate how important each factor is when deciding on an operating location.

	Essential	Important	Desirable	Not Important
Room to expand	23.7 %	32.3 %	20.4 %	23.7 %
Ground floor occupancy	43.0 %	8.6 %	10.8 %	37.6 %
Loading bays	50.0 %	13.8 %	10.6 %	25.5 %
High ceilings	55.3 %	16.0 %	8.5 %	20.2 %
Cost of land/rent	47.8 %	38.0 %	5.4 %	8.7 %
Outdoor storage space	29.0 %	11.8 %	9.7 %	49.5 %
Adequate parking	40.4 %	43.6 %	14.9 %	1.1 %
Access to transit	12.6 %	36.8 %	27.4 %	23.2 %
High visibility	20.2 %	14.9 %	17.0 %	47.9 %
Large truck access	63.2 %	15.8 %	6.3 %	14.7 %
Rail access	5.3 %	4.2 %	5.3 %	85.3 %
Water transport access	14.9 %	4.3 %	4.3 %	75.5 %
Away from residential areas	19.1 %	16.0 %	18.1 %	46.8 %
Close to management	19.4 %	21.5 %	22.6 %	36.6 %
Close to skilled labor	30.1 %	30.1 %	21.5 %	18.3 %
Close to unskilled labor	21.5 %	18.3 %	24.7 %	35.5 %
Close to customers	35.1 %	30.9 %	14.9 %	19.1 %
Close to suppliers/services	25.5 %	33.0 %	18.1 %	23.4 %
Close to competitors	2.1 %	9.6 %	5.3 %	83.0 %
Close to downtown Seattle	13.8 %	23.4 %	18.1 %	44.7 %
Close to major highways	41.1 %	37.9 %	9.5 %	11.6 %
Close to rail transport	6.5 %	6.5 %	8.6 %	78.5 %
Close to Port of Seattle	19.1 %	6.4 %	16.0 %	58.5 %
Close to airport	6.5 %	7.5 %	15.1 %	71.0 %

14. Did you move to this location from elsewhere?

Yes: **69.6** %      No: **30.4** %

See Survey Question 14 in the Long Answers section of this report to see where firms moved from.

19. What are your plans for your present location?

Total: **102**

No Change: **48.0** %      Close: **1.0** %      Downsize: **2.0** %  
Move: **20.6** %      Expand: **28.4** %

20. If your company were to consider a new facility, where would this investment occur?

Total: **96**

City of Seattle: **53.1** %      Seattle metro area: **22.9** %      Outside Seattle metro area: **24.0** %

# Open-ended Question Responses

<b>Geographic Area Key</b>			
<b>BINMIC</b>		<b>Duwamish</b>	
BN	BINMIC North	DEN	SODO
BS	BINMIC South	DES	Georgetown
		DSP	South Park
		DW	West Seattle

**Survey Question 1: What are the primary goods and/or services that you manufacture/sell from this location?**

<b>ID</b>	<b>Location</b>	<b>Comment</b>
37	BN	Petroleum (heating oil) retailer and HVAC contractor.
85	BN	webbing and rope products for Commercial Fishing Industry, including wire rope & boat lifter slings
30	BN	Yacht sales and storage
28	BN	Operate two fishing boats - moored here, fish in Alaska
34	BN	Vessel and ship repair of the fishing fleet
24	BN	Blend and package consumer quantity automotive lubricants
92	BN	Design / Produce large scale visual painting
22	BN	Steel products and fabrication
15	BN	Frozen and canned salmon processing and sales.
36	BN	Skylight sales.
13	BN	Professional Practice: facilities planning (primarily medical) // Seattle Building Design Group: Architechtural Firm (primarily medical, also hotels)
11	BN	Service and Repair of Diesel Engines
10	BN	Imports & Distribute gift
35	BN	Snap ties - concrete wall ties for use in construction. Manufacturing and sales.
87	BN	Boot repair
8	BN	Ornamental Iron work and glass-work. Art/Gates/Fences and other products
7	BN	Makes art objects: primarily out of ceramics
9	BN	Auto repair, however business is not currently open. Mr. Gourdine has hopes to re-open.
5	BN	Auto repair
93	BN	Manufacture, Package, Distribute. Biodegradable cleaner, Marine consulting services.
97	BN	Automobile Servicing and Restoration
95	BN	Primary fabric and retail awnings

**ID Location Comment**

62	BS	Signs
61	BS	Wholesale and warehouse - toys, drugstore goods, clothing
66	BS	Lubricants
99	DEN	Plumbing and industrial supplies
53	DEN	Roofing and sheet metal contractor
3	DEN	Pacific Sheet Metal, Inc. - Metal fabrication; Pacific Sheet Metal & Roofing, LLC - Roofing materials and services
68	DEN	Pour aluminum, brass & bronze castings.
63	DEN	Chocolate desserts - ship mail-order & wholesale
98	DEN	Office\Paper supplies
26	DEN	Rent and sell construction safety equipment
27	DEN	Store Fixtures
1	DEN	Warehouse for commercial grocery store equipment; auction site for surplus equipment
2	DEN	Auto repair
101	DEN	Grain export
31	DEN	Wine imports and distribution
75	DEN	Distribute Promotional Material
25	DEN	Rent and sell construction safety equipment
76	DEN	Fresh Vegetables
83	DEN	Freight
82	DEN	Workware, camping supplies, sportsware, army surplus
81	DEN	Data processing services
12	DEN	Service and manufacturing of marine propellers
21	DEN	Paper and office products
77	DEN	Wood moldings, doors, windows

**ID Location Comment**

20	DEN	Signage
67	DEN	Custom signs and graphics.
47	DEN	Transloader - export container loading (CFS)
33	DEN	Store fixtures - design, manufacture and distribution
16	DEN	Warehouse for communication systems parts
17	DEN	Wine distribution
56	DEN	Cut and formed metal
18	DEN	Freight forwarding.
19	DEN	Machine shop, finish work, fabrication
23	DES	Stock manufactured products to sell and distribute to businesses and organizations throughout the Northwest
29	DES	Sell machine/engine belts and rubber products
32	DES	Facilities and maintenance supplies - focus on sustainability
38	DES	Bakery
6	DES	Full line industrial distributor: anything from cutting tools, hand tools, power tools, and ladders to cleaning supplies and safety products.
4	DES	Store fixtures
79	DES	Engineering services, permitting, reservoir management
69	DES	Retail/Wholesaler of welding supplies.
39	DES	Import and distribution of construction supplies.
64	DES	Provide Cold Storage Service
58	DES	Counselling
65	DES	Electrical Contractor
70	DES	Distributor and wholesaler of packaging products.
60	DES	Recycling commercial scrap metal
78	DES	Non-Profit - Collect donated furniture and redistribute to low income or homeless people who have found housing.

**ID Location Comment**

59	DES	commercial flooring products
80	DES	Custom metalwork - furniture & lighting
72	DES	Water-based glues
88	DES	We are a non-profit educational skills training program located on the Duwamish Educational Center of S Seattle Community Collage.
94	DES	Labor Union
96	DES	Collision repair
100	DES	Natural stone tile and ceramic tile
71	DES	Marine transporation company
45	DES	Machine repair.
51	DES	Wholesale distributor of safety supplies; some retail to large customers (not general public); some maintenance/repair, mostly for gas-detection
40	DES	Liquor distribution center.
41	DES	Storage, assembly and distribution of goods (for other companies).
42	DES	High-end stairs - parts, manufacture, and installation.
54	DES	Wholesale distributor of equipment/mannufacturer's representative to sheet metal contractors
43	DES	Build and install custom cabinets and furniture.
50	DES	Custom furniture manufacture.
49	DES	Sell and install flooring.
102	DES	Speciality fasteners
52	DES	Wholesale distribution of sign materials (no manuf or install).
44	DES	Commercial engraving.
89	DSP	Structural steel fabricator
74	DSP	Steel drum re-conditioning and manufacturing.
73	DSP	Pressure vessels, boiler repair, forming.
86	DSP	Fabricated structural steel & misc metals

**ID Location Comment**

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46	DSP	Electrical transformers (dry-type)
91	DSP	Davits
90	DSP	Sell and service industrial equipment
84	DSP	Build industrial patterns for foundry work, RV repair work.
57	DW	Wholesale distributor of bakery ingredients
14	DW	Italian and Swiss Espresso Equipment
55	DW	Tug assist commercial vessels into/out of ports. Moving oil and other cargo by barge.
48	DW	Operate fleet of tugs & barges.

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**Survey Question 14: Did you move to this location from elsewhere? If Yes, where did you move from?**

<b>ID</b>	<b>Location</b>	<b>Yes/No</b>	<b>Comment</b>
<b>Did not relocate</b>			
5	BN	No	
7	BN	No	
13	BN	No	
22	BN	No	
92	BN	No	
97	BN	No	
34	BN	No	
62	BS	No	
66	BS	No	
3	DEN	No	
12	DEN	No	
18	DEN	No	
19	DEN	No	
21	DEN	No	
25	DEN	No	
26	DEN	No	
31	DEN	No	
47	DEN	No	
53	DEN	No	
77	DEN	No	
82	DEN	No	
101	DEN	No	
75	DEN	No	
4	DES	No	
29	DES	No	
69	DES	No	
64	DES	No	
90	DSP	No	
46	DSP	No	
86	DSP	No	
74	DSP	No	
<b>Same neighborhood</b>			
9	BN	Yes	Right up the street
11	BN	Yes	Leary Way, In Ballard

ID	Location	Yes/No	Comment
35	BN	Yes	Ballard
24	BN	Yes	Ballard area
85	BN	Yes	Another Ballard location (before that, downtown)
1	DEN	Yes	Across the street
17	DEN	Yes	First Ave, Seattle
20	DEN	Yes	1 mile south
68	DEN	Yes	1st Ave.
67	DEN	Yes	1 block away
83	DEN	Yes	6th and Holgate
56	DEN	Yes	503 Railroad Ave - Seattle
98	DEN	Yes	1 block south
23	DES	Yes	1926 1st Ave. S
32	DES	Yes	4 blocks away
42	DES	Yes	5 blocks away
43	DES	Yes	Airport Way S. (8 blocks from present location)
39	DES	Yes	Other side of street
49	DES	Yes	6 blocks away
54	DES	Yes	1st Ave. S
60	DES	Yes	1st Ave. (1933)
45	DES	Yes	Spokane St.
88	DES	Yes	Edison Tech in 1962
96	DES	Yes	2340 SW Spokane St
102	DES	Yes	5021 Colorado Ave S
100	DES	Yes	2 blocks south
84	DSP	Yes	1 blk away
73	DSP	Yes	E. Marginal Way
48	DW	Yes	Pier 46
<b>Another Seattle neighborhood</b>			
8	BN	Yes	East Marginal Way
10	BN	Yes	Other location within City
36	BN	Yes	U District
37	BN	Yes	Started in N.Lake, then on Dexter
15	BN	Yes	Queen Ann
28	BN	Yes	Kodiak, AK
30	BN	Yes	Lake Union
95	BN	Yes	magnolia
87	BN	Yes	Expansion - Shilshole Bay Marina

<b>ID</b>	<b>Location</b>	<b>Yes/No</b>	<b>Comment</b>
61	BS	Yes	1st and Bell - 1963
2	DEN	Yes	Beacon Hill
16	DEN	Yes	North Seattle
27	DEN	Yes	15th Ave South
33	DEN	Yes	Seattle
63	DEN	Yes	Georgetown
76	DEN	Yes	1st Ave S
99	DEN	Yes	3645 Interlake Ave N
81	DEN	Yes	2401 4th Ave
38	DES	Yes	Pioneer Square
41	DES	Yes	Georgetown
51	DES	Yes	Minor Ave. (Paul Allen Hill)
52	DES	Yes	Downtown
59	DES	Yes	Downtown Seattle w/ Kent warehousing
58	DES	Yes	Soho
65	DES	Yes	1st Ave S - 1955
70	DES	Yes	Soho area
78	DES	Yes	23rd and Jackson
72	DES	Yes	James Street
80	DES	Yes	Chinatown
91	DSP	Yes	Woodinville
89	DSP	Yes	Harbor Island
14	DW	Yes	4544 Leary Way (Ballard)
55	DW	Yes	Downtown Seattle
57	DW	Yes	5290 1st Ave S
<b>Outside Seattle</b>			
93	BN	Yes	Edmonds
6	DES	Yes	Kent
44	DES	Yes	Operated part-time from Bellevue
50	DES	Yes	Issaquah
71	DES	Yes	Tacoma
<b>Other</b>			
79	DES	Yes	
94	DES	Yes	Not Sure
40	DES	Yes	unknown

### Survey Question 15: Why was your present location chosen?

ID	Location	Comment
<b>Price</b>		
10	BN	Affordable, fit the need
13	BN	Probably because it was 'cheap'
7	BN	At time: Inexpensive industrial space
66	BS	Purchased an existing business.
16	DEN	Lower rent and better freeway access.
68	DEN	Building was for sale.
81	DEN	Price, availability, parking, ground level
75	DEN	Business purchased for former owner and located at this location.
83	DEN	Purchased the property
49	DES	Lot became available and was a good price.
80	DES	Rent was very low
86	DSP	1955- Land was available and affordable
73	DSP	Old location on King County land (leased) - rent kept going up, so when offer came up to buy land, they took it.
48	DW	Ability to buy property.
<b>Location</b>		
22	BN	close to comptation
87	BN	Industrial Area
5	BN	Visibility and proximity to anticipated customers.
11	BN	Good location for his business, has direct water access
92	BN	Linked to another business at this location
95	BN	Same neighborhood, Good location for business.
30	BN	Large space with water frontage
34	BN	fishing fleet
28	BN	Company outgrew the potential in AK, and this is where most fishing boats operate from (i.e., the facilities are here)
93	BN	Proximity to maritime industry
62	BS	Close to downtown
61	BS	Proximity to Magnolia
21	DEN	Proximity to customers
12	DEN	Business required a waterfront location
25	DEN	Proximity
76	DEN	Near International district
26	DEN	Proximity
99	DEN	Location

<b>ID</b>	<b>Location</b>	<b>Comment</b>
47	DEN	Railroad - short distance between rail cars and trucks. Limited locations in City of Seattle where freight can be moved from rail cars to trucks.
63	DEN	Landlord went out of business, moved closer to Fed-ex
82	DEN	Because the area was Industrial
27	DEN	Needed more space
67	DEN	Close to old location.
3	DEN	Close to downtown; rent was affordable (50 years ago)
39	DES	It was close and centrally located.
94	DES	Good central location to service members
96	DES	Port of Seattle bought part of land
44	DES	Central to customer base and suppliers.
71	DES	Waterfront property was available for purchase - doubled the size of terminals, more dock space, room to expand.
32	DES	It was an upgrade in facilities
6	DES	Proximity to City of Seattle and King County clients
91	DSP	Closer to vender
55	DW	Access to waterfront and enough acreage to consolidate seattle operations
<b>Space / Amenities</b>		
35	BN	More space
36	BN	Warehouse and outdoor space
37	BN	It was bigger and was an existing heating oil site.
24	BN	Property was adequate for needs at the time and for foreseen needs
33	DEN	It had more space.
31	DEN	size, amenities
20	DEN	Building attributes and lease rate
1	DEN	It had more space and the price was right.
43	DES	It was street level, had nice lighting, and some good amenities for this business. It was close to old location.
59	DES	Consolidation of functions, ability to purchase property
51	DES	Increase in size and visibility.
100	DES	Location, size of building, features of building
102	DES	Increased floor area. More product, better visibility, traffic.
58	DES	They needed to move away from the stadiums; had more space.
50	DES	Larger space and closer to customers.
41	DES	Building was available for purchase and had suitable layout and size.
42	DES	Old building was being demolished - the area was central to goods and services needed.
46	DSP	Expanding and getting more customers at the time and needed more space. 4-5 employees became 12.
89	DSP	Other facility burned down; this facility was large with area for expansion.

<b>ID</b>	<b>Location</b>	<b>Comment</b>
84	DSP	Larger facility, had building built above street level to prevent flooding, old site often flooded
<b>Access</b>		
98	DEN	Access\Economic
17	DEN	More space, better truck access to the area (generally)
38	DES	Good access, enough space, price
14	DW	Access and Adequate Space to grow
<b>Convenient</b>		
15	BN	Established at site
97	BN	available at time
85	BN	Other facility was torn down, present location was convenient
9	BN	Available
18	DEN	Original business owner was friends with the building owner.
53	DEN	Convenience, Right in the middle of downtown Seattle
54	DES	Property became available.
23	DES	Previously leasing and building was sold. Owner of business then bought current location and began leasing it to his company.
<b>Other</b>		
2	DEN	Chance
56	DEN	No idea before I was born
77	DEN	Took over former business
19	DEN	Grandfather bought property.
101	DEN	
40	DES	Chosen by the State.
70	DES	Realtor
78	DES	No knowledge
79	DES	Government-owned building.
72	DES	Land swap when freeway was put in.
52	DES	It was available for purchase.
88	DES	Associated with S Seattle Community College
4	DES	
29	DES	
45	DES	
60	DES	
69	DES	
64	DES	
65	DES	
90	DSP	

<b>ID</b>	<b>Location</b>	<b>Comment</b>
74	DSP	
57	DW	Because location was owned by parent company

**Survey Question 16: Currently, what are the primary advantages of operating at your present location**

<b>ID</b>	<b>Location</b>	<b>Comment</b>
<b>Visibility</b>		
5 BN		Visibility
37 BN		Visibility; easy access for distribution.
9 BN		Visibility
97 BN		inexpensive lease
98 DEN		Access\Economic
1 DEN		Visibility for auctions.
50 DES		Better exposure/visibility; close to customers.
42 DES		Centralized; visibility; good manufacturing space; ease of delivery of goods.
<b>Access</b>		
32 DES		Proximity to I-5 & I-90, and to public transit
69 DES		Ease of access for customer; close to highways.
58 DES		Easy access; good communication/phone lines; good parking.
96 DES		Location, convenient to I-5
78 DES		Access
70 DES		General location - easy access to I-5, good truck access, sufficient warehouse space.
59 DES		Highway access, proximity ro downtown customer base
64 DES		Facility has plenty of room for trucks to get in and out. Proximity to Port of Seattle. Location is conventient.
57 DW		Proximity to freeways, trucks deliver across the state. Being in Seattle is important - able to get to large WA city in one day.
<b>Location</b>		
7 BN		Allows owner to make his craft: allows for required large kiln and other needed equipment. Also, close to his home
8 BN		1:Close to home. 2: Location to customers. 3: Proximity to suppliers. 4: No issues w/ noise complaints (away from sensitive receptors)
35 BN		Proximity to down town. Stability of space.
10 BN		Good space for business / For tenant (a welder), proximity to clients
15 BN		Proximity to industry; near owner's home.
92 BN		Close to home, built in art community, feel of space.
24 BN		Parts and repair required for manufacturing product are close by. Close to home location is important to the owning family and long-term employees
28 BN		Convenient, nice facilities
11 BN		1: Water access. 2: Access to dock space
22 BN		close to industrial
85 BN		Proximity to long-standing customer base and the cost of rent



<b>ID</b>	<b>Location</b>	<b>Comment</b>
87 BN		Proximity to water, Location at marina, Location in Industrial areas allows noisy work to occur with less restriction.
34 BN		customers present
93 BN		Customer base, Longstanding location creates familiarity with customers.
62 BS		Cose to downtown
61 BS		Location and size
3 DEN		It's known to all their customers; close to downtown and all neighborhoods.
67 DEN		Close to customers.
25 DEN		Proximity
26 DEN		Proximity
19 DEN		Already established and set up for permanent equipment fixtures.
21 DEN		Proximity to customers
18 DEN		Convenient location for the employees; inexpensive.
56 DEN		Cental to most of puget sound area. Land and building already paid for. Customers know where we are located.
47 DEN		Burlington Northern served, close to Port of Seattle.
63 DEN		Close to Fed-ex
68 DEN		Central location.
53 DEN		Close to most new projects in Seattle area.
20 DEN		Location
76 DEN		customers close by
77 DEN		Well Known
75 DEN		convenience
81 DEN		proximity to USPS & Downtown
82 DEN		Location
83 DEN		Location
99 DEN		Close to downtown, we sell to most of the downtown buildings
12 DEN		Waterfront location (in close proximity to haul outs and marinas)
65 DES		convenience to supply house, industrial customers. Central for employees.
4 DES		Its centrally located to customers, the labor force, and thtransportation.
6 DES		Proximity to key clients (City of Seattle, Port of Seattle, King County)
23 DES		1: Proximity to Airport, freeways, shipping. 2: Proximity and central location for customers (who are both N and S of Seattle)
38 DES		Location, accessible to freeways; accessible to neighborhoods they supply.
44 DES		Central location. It's out of the retail and residential areas (traffic).
45 DES		Close to customers and suppliers. Convenient for employees.
102 DES		Better location
49 DES		Convenient location for suppliers and customers (in the "design community"). Centrally located for employees.

<b>ID</b>	<b>Location</b>	<b>Comment</b>
54	DES	Centrally located; easy access to transportation routes.
51	DES	Familiarity with customer base. Centralized access to whole delivery area.
52	DES	Centrally located for deliveries, and for customers coming to them.
60	DES	Close to customers & suppliers
88	DES	Centrally located, other construction programs on site, in keeping with tenor of mission.
94	DES	Centrally located from membership both north to south and east to west
100	DES	Location!
40	DES	Proximity to rail, highway and centrally located for majority of outlets.
41	DES	Close to downtown. Building is very well suited for their operation.
91	DSP	Close to vender
46	DSP	Close to customers, centrally located for employees. Good services w/ Seattle City Light.
86	DSP	No residential. close to downtown seattle and eastside developments.
73	DSP	Access to labor, transportation, central location.
74	DSP	Industrial area, very well-located to freeway system.
89	DSP	Longevity in area that is good for what company does. Demographic advantage.
14	DW	Access to the highways and airport facilities, and Space
48	DW	Right on waterfront, own property, central location in Puget Sound.
55	DW	Consolidate operations and close to customers
<b>Space / Amenities</b>		
30	BN	Large size, 1-story, water frontage
95	BN	High ceilings, no posts in buildings, good neighborhood.
36	BN	Necessary space
27	DEN	Large Warehouse and access to 4th traffic
31	DEN	Good storage room, good temperature control, nice office, can bring containers in
33	DEN	Access to industrial space for shipping and distribution.
2	DEN	Adequate space; centrally located; good access
101	DEN	It is the only grain export facility in the area
17	DEN	Has loading docks; easy access to highways and downtown; access in general in good.
79	DES	Adequate parking with no charge to employees. Close to airport.
71	DES	Dock space, water access, size of terminal.
43	DES	Good, street-level access. There is pressurized air in the building, which is important for operation.
84	DSP	Building size
<b>Price</b>		
13	BN	1: COST. 2: Stability (been in one location for along time)
16	DEN	Low rent and good freeway access.

<b>ID</b>	<b>Location</b>	<b>Comment</b>
80	DES	Rent is below market. Security is good.
<b>Other</b>		
66	BS	Security.
39	DES	24 hour access to building.
72	DES	Own property - wouldn't be open otherwise
29	DES	
90	DSP	Company is landlord

**Survey Question 17: Currently, what are the primary disadvantages of operating at your present location**

<b>ID</b>	<b>Location</b>	<b>Comment</b>
<b>Building/Space issues</b>		
15	BN	Lack of space; expensive.
30	BN	No room to expand
85	BN	Improvements to the building itself need to be made
92	BN	No elevator, Heat an issue for some tenants
9	BN	No parking
8	BN	Minor building issues, nothing else
17	DEN	Too little space; narrow driveway is hard for trucks to get in and out.
25	DEN	Room to expand
26	DEN	Room to expand
20	DEN	Expansion
47	DEN	Constraints - no room to grow. No outdoor storage facilities.
18	DEN	Not enough parking.
31	DEN	Can't bring in high-cube containers, can't close the door on empty containers, the dock is too low.
81	DEN	Not enough storage/production space
1	DEN	There is not enough room for large truck access/loading.
6	DES	Not enough space. Commute
80	DES	Not enough space. Space is very "rough" - no amenities. Government-owned building - not responsive as a landlord.
96	DES	Run out of room/space. No other land available in immediate area to rent or buy
39	DES	Government-owned building, but no special amenities.
<b>Traffic / Transit / Transportation</b>		
22	BN	Traffic
36	BN	Network connections. Very congested in surrounding areas.
10	BN	Transportation issues for moving product. / Transit access for employees
3	DEN	Traffic - specifically the train traffic holding up customers, trucks, etc.
19	DEN	The train traffic prevents trucks from getting in and out.
68	DEN	Train traffic.
75	DEN	Traffic, 2 floor location no elevator
53	DEN	Mariner traffic, busier roads than ever before
98	DEN	Traffic, Parking
12	DEN	Foot traffic
32	DES	Lack of parking; traffic congestion relative to stadium events; access to entry-level employee pool.
40	DES	Local traffic makes it difficult for large trucks to get in and out.

<b>ID</b>	<b>Location</b>	<b>Comment</b>
41	DES	Train traffic causes problems getting in and out.
45	DES	Traffic congestion in the area is bad.
64	DES	Traffic, Transportation delay trucks.
70	DES	Traffic, especially if 99 or W.Seattle bridge is backed-up or closed.
42	DES	Viaduct traffic.
60	DES	Traffic congestion and truck mobility.
79	DES	Mass transit is a challenge for employees. Old, inefficient building. Not seismically sound - does not comply with current standards.
38	DES	Inadequate for mass transit (access and timing)
46	DSP	Traffic is a real pain. Hwy 99 and 1st Ave S are very congested at rush hour.
73	DSP	Some traffic problems
86	DSP	We can be difficult to locate; 1st Ave south bridge traffic
57	DW	Availability of public transport and proximity to services - not much on harbor island . Environmental effects of industrial uses are also a concern.
<b>Location</b>		
95	BN	More visibility would be nice.
97	BN	visibility is less than ideal, road conditions are poor.
62	BS	commute
101	DEN	Business not ideally suited for downtown environment
16	DEN	Distance from main offices in Bothell.
21	DEN	Change of surrounding uses-stadiums
50	DES	Long commute for some employees (from Issaquah).
51	DES	Commute for employees. Age of building.
69	DES	Competition is too close.
88	DES	Probably some exaggerated air pollution levels, we are very near the final approach path into sea-tac airport.
90	DSP	most customers are north of city- company is south of city
55	DW	At the end of a long road with rail and truck operations slowing down traffic, prices of rent
<b>Taxes / Cost</b>		
87	BN	Cost- Lease costs. Shilshole Bay location restricted noise and regulations stopped work from occurring in evening hours
93	BN	Rent
34	BN	regulations by the city and county
35	BN	Taxes; Location relative to HW; space.
83	DEN	City of Seattle - Taxes vs level of service
99	DEN	Cost and city of Seattle and total lack of concern for the business community

<b>ID</b>	<b>Location</b>	<b>Comment</b>
56	DEN	High city cost sucks ass and 6th Ave no longer an industrial street where it is easy for trucks to enter or leave. Transients and homeless using neighborhood make customers less enthusiastic to come here.
71	DES	Poor highway and rail access. Permits and fees - adversarial, fee-oriented city. Tacoma had much fewer hoops to jump through to operate a business.
94	DES	costs are high could find a much cheaper place out of town
43	DES	Having to pay rent (would rather own).
<b>Land use</b>		
13	BN	Being in an industrial area brings dust and noise that is not ideal
24	BN	The possibility of encroaching residential development // Transportation issues
<b>Parking</b>		
77	DEN	Parking
74	DSP	Parking - lack of parking is a problem. Regulatory difficulties as well.
<b>Infrastructure</b>		
65	DES	Quality of roads. Train traffic causing delays.
91	DSP	Terrible Roads
<b>Crime</b>		
33	DEN	Theft - have had numerous office and car break-ins, and even trucks stolen. Train traffic is a nuisance.
2	DEN	Fairly high crime area; transients interfere with business
59	DES	Crime, high cost to operate in Seattle - taxes, traffic.
<b>None</b>		
37	BN	None.
28	BN	None.
11	BN	Likes his space, no voiced disadvantages
5	BN	None
7	BN	No disadvantages
61	BS	None
27	DEN	None
76	DEN	None
63	DEN	None
82	DEN	None
4	DES	None.
23	DES	No major disadvantages
58	DES	None.
100	DES	N/A
52	DES	None.
44	DES	None.

<b>ID</b>	<b>Location</b>	<b>Comment</b>
72	DES	None.
49	DES	None.
102	DES	None yet
89	DSP	None
84	DSP	None
14	DW	New location, however no foreseen long-term disadvantages
<b>Other</b>		
67	DEN	Cranes
78	DES	Services not close, hard for donors to find
29	DES	
48	DW	Narrow waterway with lots of nets when fishing is occurring.

**Survey Question 18: What is the anticipated remaining useful life of existing facilities?**

ID	Location	Comment
<b>Unknown</b>		
85	BN	unknown
34	BN	untill the city forces us the leave
95	BN	Looking to purchase the building
9	BN	Undetermined
66	BS	Unknown
18	DEN	
101	DEN	
47	DEN	Unsure - moving away from industrial uses and toward retail (in the area generally).
2	DEN	unknown
29	DES	
64	DES	
4	DES	
88	DES	We are just starting a newly constructed facility this week. The current main building we are in is over 70 years old and totally inadequate.
<b>0-5 Years</b>		
93	BN	Shortterm 1-4 years
30	BN	2-5 yrs
8	BN	2 yrs on lease, hopefully will be there longer
62	BS	None - planning to move to new location in Lake City
17	DEN	2 months (move already planned)
98	DEN	3 years
75	DEN	3-4 years
33	DEN	Limited - they have had to rent other storage spaces.
31	DEN	1.5 years
81	DEN	2 yrs
67	DEN	5 years
1	DEN	2 1/2 years - remainder of lease.
65	DES	Moving 4-2-07 to E Marginal
6	DES	Moving in 10 months (new site: Minimum of 10 years)
41	DES	5 years
39	DES	2-5 years (for them)
43	DES	2.5 years left on lease
102	DES	3 years
78	DES	3-5 Years
51	DES	20+ years. They're moving in 12-18 months.



<b>ID</b>	<b>Location</b>	<b>Comment</b>
32	DES	12 months
57	DW	Maybe one year before major remodel of more.
14	DW	5 year lease, however hope for on-going operation at location
<b>5-10 Years</b>		
36	BN	5-10 years before expansion
22	BN	10 yrs
10	BN	5 to 10 years, however it is difficult to predict (if rezoning occurred, owner would likely sell or redevelop property)
20	DEN	10+ Years
56	DEN	5 -10 years
99	DEN	5-10 years
21	DEN	10+ years
50	DES	5+ years
69	DES	less than 10 years.
42	DES	15 years
<b>10-25 Years</b>		
24	BN	15 to 20 years, however there is need for expansion
15	BN	20 years
35	BN	2,000 - 10-15 years; 3,000 - 20 years; 4,000 - 20 years; 10,000 - 40-30 years.
25	DEN	10 years
83	DEN	25
27	DEN	20+ years
63	DEN	20 + yrs
77	DEN	10-20 years
26	DEN	10 years
96	DES	10-15yrs
70	DES	20+ years
86	DSP	10-20 yrs
<b>25-50 Years</b>		
97	BN	35 years
45	DES	30 years
71	DES	30-40 years
100	DES	30 Years
49	DES	40+ years.
59	DES	50 yrs
73	DSP	30 years
46	DSP	40-50 years

<b>ID</b>	<b>Location</b>	<b>Comment</b>
91	DSP	30 years
55	DW	45-50 yrs
<b>50-100 Years</b>		
19	DEN	50 to 100 years
<b>Indefinite</b>		
5	BN	Indefinite
7	BN	No anticipated horizon
11	BN	Long term, no anticipated horizon
13	BN	Indefinite
37	BN	Indefinite
92	BN	on going
28	BN	Indefinite as long as rent stays reasonable.
87	BN	Long Term - investing in facilities
61	BS	Forever
3	DEN	Indefinite
12	DEN	Ongoing
16	DEN	As long as the rent does not increase.
68	DEN	Indefinite.
53	DEN	Forever
76	DEN	Forever
82	DEN	Never
23	DES	Indefinite
38	DES	Indefinite.
40	DES	Indefinite
44	DES	Indefinite.
54	DES	Indefinite
52	DES	Indefinite
60	DES	Indefinite
58	DES	Indefinite.
79	DES	Indefinite (with a lot of maintenance)
80	DES	Indefinite.
72	DES	Indefinite
94	DES	indefinite
90	DSP	Indefinite
84	DSP	Indefinite
74	DSP	500 years (one structure on site has been there since 1800's)
89	DSP	Indefinite

<b>ID</b>	<b>Location</b>	<b>Comment</b>
48	DW	100+ years

**Survey Question 21: If you were to consider areas outside of Seattle, what areas would be considered and why?**

ID	Location	Comment
<b>Kent - Auburn Valley</b>		
9	BN	Federal Way or Auburn. They are 1: closer to home, and 2: taxes are less in these areas.
66	BS	Renton/Kent - traffic is better
17	DEN	Kent - lot of large warehouses with better truck access to the buildings, costs less; Renton - but not much space available, costs less.
1	DEN	Auburn, rents are lower.
29	DES	Planned move to Auburn.
69	DES	A portion of the operation is moving to Tukwilla or Kent - property is cheaper and more available.
59	DES	Kent, Tukwilla - better value, newer facilities, better access
40	DES	Auburn Valley - better access to highways.
41	DES	Kent Valley - or wherever warehouse space is cheapest.
80	DES	Tukwilla - somewhere along the light rail.
51	DES	Kent Valley - would be non-disruptive to employee base. Possibly Fall City or Bothell.
32	DES	Warehouse facility is consolidating with other currently owned distribution facilities in Auburn; Retail portion is relocating to 6th and Lander.
91	DSP	Tukwila/Kent - better road maintenance Lower taxes as well
46	DSP	Puyallup, Seatac Airport area, or Auburn/Kent area.
14	DW	Auburn or the Kent Valley (desire for a new facility and greater proximity to airports and highways)
<b>South Seattle Metro</b>		
10	BN	South end because it is closer to the airport
16	DEN	Duwamish
83	DEN	Southpark
3	DEN	White center, Burien, 5-corners. All are closer to the owner's residence.
39	DES	Southpark, Georgetown - availability and price.
96	DES	South of Seattle - commute
58	DES	Might have to consider moving out of the City, further south, if prices keep going up.
<b>Tacoma - South Sound</b>		
36	BN	Tacoma - closer to south end customers; cheaper (taxes and rent)
35	BN	City of Pacific - growth demands in South Sound area; taxes; space available.
12	DEN	1: Burlington, I-5 access. 2: Tacoma (would be an additional shop, not a complete move)
70	DES	Would be south - where most employees live.
71	DES	Tacoma - pro-business, actively pursuing marine-services industry.
86	DSP	Southeast King Co because of space availability
55	DW	Tacoma - Lower cost and expanding customer base
<b>Eastside</b>		
22	BN	Bothel, Woodinville

<b>ID</b>	<b>Location</b>	<b>Comment</b>
99	DEN	south or east
56	DEN	Woodinville, Kirkland, Redmond. Commuting would be much easier for employees - no bridges. Would be quicker access for suppliers trucks.
100	DES	Eastside to better accommodate customers
90	DSP	Easier access to north and south from an eastside location, but much more unlikely to happen
<b>Western Washington</b>		
24	BN	Only areas on the west side of the state, because: important to have access to transit, access to overseas markets in Asia. Would need an area that provided adequate space.
77	DEN	Yakima - Labor logistics, operating cost
74	DSP	Central WA - close to customer base and less restrictive.
<b>North-South Sound</b>		
34	BN	Outside of King County due to regulations
11	BN	Tacoma or Everett (areas close to marine customers)
53	DEN	North or south of seattle in an industrial area - Price
57	DW	Toward Everett - proximity to highway
<b>Outside Washington</b>		
13	BN	Other West Coast Cities with proximity to airport
<b>No Comment / Seattle / Other</b>		
5	BN	Would not move outside of Seattle.
7	BN	Would not consider
8	BN	Try to stay in Ballard. However is not sure if it would be possible with current trends of land redevelopment and rent cost increases.
37	BN	
15	BN	n/a
92	BN	
28	BN	It depends on market prices at the time.
30	BN	
85	BN	would not consider areas outside of the City
87	BN	Waterfront communities due to proximity to clients.
93	BN	
95	BN	
97	BN	
62	BS	
61	BS	
2	DEN	
18	DEN	They would not consider a location outside of Seattle.
19	DEN	
20	DEN	

ID	Location	Comment
21	DEN	
25	DEN	
26	DEN	
27	DEN	
31	DEN	
33	DEN	They would not move out of the city.
47	DEN	
63	DEN	
68	DEN	
67	DEN	
76	DEN	
81	DEN	
82	DEN	
98	DEN	
101	DEN	Type of business not best suited for downtown area
75	DEN	
4	DES	
6	DES	Moving to new location with more space about a half mile away from current location
23	DES	Would not consider other locations
38	DES	
42	DES	If move, showroom would likely be relocated within the Metro area, and the manufacturing portion would be moved outside of the Medtro area due to the cost of large space.
43	DES	Would consider other areas if the price is right.
44	DES	n/a
45	DES	
102	DES	
49	DES	
50	DES	May opt to buy the building they're in, instead of moving.
54	DES	
52	DES	Unknown at this time.
60	DES	They would have to close if they had to leave that location.
64	DES	
65	DES	
78	DES	
79	DES	
72	DES	Cost considerations.
88	DES	
94	DES	

<b>ID</b>	<b>Location</b>	<b>Comment</b>
84	DSP	not sure what areas - hard to get through Seattle
73	DSP	n/a
89	DSP	
48	DW	n/a - necessary to be on waterfront.

**Survey Question 22: What governmental actions could help facilitate your company's existing operations and/or future plans?**

ID	Location	Comment
<b>Lower Taxes</b>		
9	BN	Taxes kill small businesses
36	BN	Lower taxes.
15	BN	Lower taxes. Ease of restrictions for small manufacturers in Seattle/ease of zoning restrictions.
85	BN	City should examine how much it costs to operate a small business within the City, between taxes / rent / insurance costs (pay more attention to the needs and issues facing small businesses)
11	BN	1: Less taxes. 2: Importance of Viaduct to commuters (City should think carefully about shutting it down)
5	BN	No real response. Less taxes (jokingly).
61	BS	Stay away. Do away with taxes. Give loans at 2% to business owners.
25	DEN	Tax breaks
26	DEN	Tax breaks
21	DEN	Costs of doing business
56	DEN	Reduce tax and fee burdens. Do away with all day on street parking so trucks will have an easier time pulling in and out of our facility. Find a way for motorists to yield to truck traffic in order to facilitate freight transportation. Expand Alaska Way Viaduct and Hwy 99 and 520 bridge for more capacity.
2	DEN	A reduction in fees and taxes. He has to pay a fee for a "uses" business license in order to sell used parts, in addition to paying for his regular business license for repair work. There are taxes and fees for everything, which makes the costs of operating very high.
29	DES	Lower taxes. His building is being condemned "because of the ineptitude of the Port, City, and Federal government."
23	DES	Less taxation. Also, listening to the voters who have made their opinion clear about the viaduct, and putting a stop to the 'paralysis' and obvious agendas that makes operating an industrial business in Seattle very difficult.
51	DES	They receive push-back from customer about their tax rate being higher than other areas. Would love to have business permits to use the HOV lanes. More funds for highways than mass transit.
54	DES	Taxes are too high for small businesses. Viaduct: don't cut the artery of Seattle - make sure access to businesses is not cut off.
102	DES	Never pay taxes again
39	DES	Leasehold excise tax really hurts small businesses.
65	DES	Tax structure is a big disadvantage. Have Nicholls drive on city streets. Would like to see it as mixed-use zoning.
<b>Road improvements</b>		
97	BN	Widen road and put in parking on street.
13	BN	1: Fixing 45th. 2: Leaving them alone (property was under consideration for purchase because of monorail)
62	BS	Improve road conditions, transportation, traffic.
33	DEN	Road improvements are desperately needed in the area. The roads are bad enough to cause significant problems for the truck traffic.
17	DEN	Better planning for roadwork (work not currently being done as originally planned or expressed).
52	DES	Fix access road and alley way - full of pot holes and City refuses to fix them. Problems due to disposal truck from neighboring business.
71	DES	Infrastructure improvements - roads are terrible and no maintenance is ever done. Better participation of City to promote business. Port is well promoted, but City doesn't actively work with folks on non-Port property.
<b>Concern over Viaduct</b>		



<b>ID</b>	<b>Location</b>	<b>Comment</b>
34	BN	get rid of government
87	BN	Realistic interpatation of water quality standards for permitting issues. NPDES permit appeal process going on, feel like environmental groups and other pressures are leading to bussiness being targeted.
93	BN	Environmental restrictions that require more or better spill protection in and around the city waterfront
68	DEN	Land contamination - land was contaminated when purchased and have been trying to clear it with the City ever since. The process is a joke.
1	DEN	Indirect impacts from the Health Department holding up customer's permits, requiring them to store equipment longer. The sign restrictions and permitting process and fees have prevented the business from installing a locator sign.
38	DES	Conderned about what happens with viaduct. Improve transit/transportation choices to and from the site. City should give more support for green waste recycling.
43	DES	Viaduct - construction of a tunnel would cause huge problems for businesses in this area.
64	DES	No tunnel would be problematic
70	DES	Viaduct - Don't block traffic to the waterfront businesses; consider the overflow from other areas also.
60	DES	Viaduct disruption would really hurt. Would like to see property zoning stay the same. Generally very happy with the dealings with the City.
40	DES	Don't close the viaduct.
44	DES	Viaduct - where is the traffic going to go? Before deciding on an alternative, the traffic implecations and the effects on businesses located in that area should be weighed closely.
69	DES	Every time they try to expand their operation, the permitting process takes forever because they are assumed to be a hazardous-type facility, even though they are not.
94	DES	Lighten up on labor union regulations at federal level. State keeps dinging business for cost of unemployment benefits. Union gets dinged for unemployment taxes that should be paid by former employers that its members are employed under.
46	DSP	Permitting and monitoring for stormwater is difficult and compliance is expensive, particularly since small businesses are expected to shoulder the same costs as large businesses. Small business tax reduction would be helpful.
89	DSP	More realistic view on outsourcing - NAFTA never did us any favors. They should be concessions for demostic business to allow them to be competitive with overseas business. Education for children should be job specific.
57	DW	Viaduct will have major impact - not repacing it is totally unacceptable. Minimize amount of time it takes for repair or replacement. Improve public transportation to/from Harbor Island.
14	DW	8-lane viaduct (improve employees commute time)
55	DW	Streamlining permit applications for construction
48	DW	Government should understand tug business before they try to regulate too harshly - tugs are what bring commerce into Port of Seattle.
<b>Improve transit</b>		
95	BN	Transit is not that important.
35	BN	Transit; better roads; better management of taxes.
98	DEN	More bus access
<b>Transportation / Traffic issues</b>		
22	BN	Traffic transportation system <input type="checkbox"/> Fix the traffic mess, transportation system
66	BS	Improving transportation issues.
16	DEN	Better transportation/circulation in the area.

<b>ID</b>	<b>Location</b>	<b>Comment</b>
49	DES	Traffic is getting worse. Its harder to make money when the trucks are stuck in traffic.
79	DES	Traffic light going into the complex has a very short cycle - problematic considering how many people work in the complex. Complex/area needs better access to transit.
6	DES	Improved access to surface streets and ensuring that surface streets are not overly congested (Deliver products themselves: can be very expensive in traffic)
73	DSP	Improve traffic access out of facility - stop-light keeps trucks waiting a long time for short lights to get out.
86	DSP	Transportation issues and logistics improvements must be made
<b>Maintain industrial area as is</b>		
8	BN	Try to maintain industrial areas for only industrial uses
67	DEN	Maintain the industrial property as industrial.
42	DES	When developing mixed-use/industrial areas, maintain a certain percentage as industrial-only.
<b>Increased community involvement in the planning process</b>		
20	DEN	Community involvement and input in future of the SODO district.
<b>Other</b>		
37	BN	None.
28	BN	Would like to see a revitalization of the downtown area.
24	BN	Keeping trucking corridors open and accessible (used trucks trying to reach them from Vancouver, BC as an example: no direct access from I-5 corridor.
7	BN	1: Limiting the size of retail stores moving into industrial areas to a small footprint size (a way of stopping large footprint stores like Fred Myer, Target, and others from taking over industrial areas). 2: Controlling land values from sky rocketing 3: Passing rules or zoning parking in order to stop people from living in cars and campers on the street (in close proximity to his business)
12	DEN	Cost controls on the cost of living for industrial workers, making the City affordable for industrial wage earners
27	DEN	
18	DEN	
19	DEN	
47	DEN	None.
31	DEN	The liquor board could use refurbishing
53	DEN	
63	DEN	None
76	DEN	Nothing
82	DEN	Get rid of day labors in home depot parking lot
101	DEN	
50	DES	None.
58	DES	If the mayor makes that area the "red light district," then property prices will likely plummet - which will make it more affordable for them to stay in that area.
80	DES	Wish there was a City-run venue available for dispute resolution with customers.
45	DES	
32	DES	Adopt purchasing practices that drive sustainability.
72	DES	None

<b>ID</b>	<b>Location</b>	<b>Comment</b>
96	DES	None
78	DES	None
4	DES	
90	DSP	
91	DSP	
84	DSP	
<b>Better government services</b>		
75	DEN	Dealing with small businesses better. Make wireless internet a public utility.
99	DEN	Stop acting like business is a cancer. We provide most of the revenue that government sucks up and wastes.
59	DES	Better gov't services - Storm drains that work, City support for businesses located in city.
88	DES	Better support-funding for skills training
41	DES	Regulate construction to anticipate traffic flows with existing traffic.
<b>Rezone area to allow additional uses</b>		
92	BN	More live and work studios, preservation of marine industry.
30	BN	Zone to allow taller building, allow reconstruction of bulkhead, Streamline gov't regs and process
10	BN	1: Would like to see his lot be re-zoned to high density residential, as it is very near residential areas and there would be more productive as a residential area. 2: There is a conflict between zoning and the current shoreline designation overlay (industrial vs. residential)
<b>Issues with parking</b>		
77	DEN	Enforce parking regulations
100	DES	Review the policy of commercial truck parking on city streets in georgetown
74	DSP	Regain parking that was lost when 1st Ave S. Bridge was re-constructed.
<b>Issues with train traffic</b>		
3	DEN	Do something about the train traffic (reduce, re-route, etc.). What happens with the viaduct is a big concern to the businesses in the area - make sure access remains available. Taxes are too high. L&I needs to be re-vamped: the fees are unfair and disproportionate to small businesses; need to factor in seasonal workers (don't pay out during a time that the employee wouldn't regularly be working); doctors/hospitals shouldn't be paid any more than by regular insurance companies.
81	DEN	Don't build Lander RR overpass. Improve public transit - Busses. Forget the train
83	DEN	Install overpasses over RR