



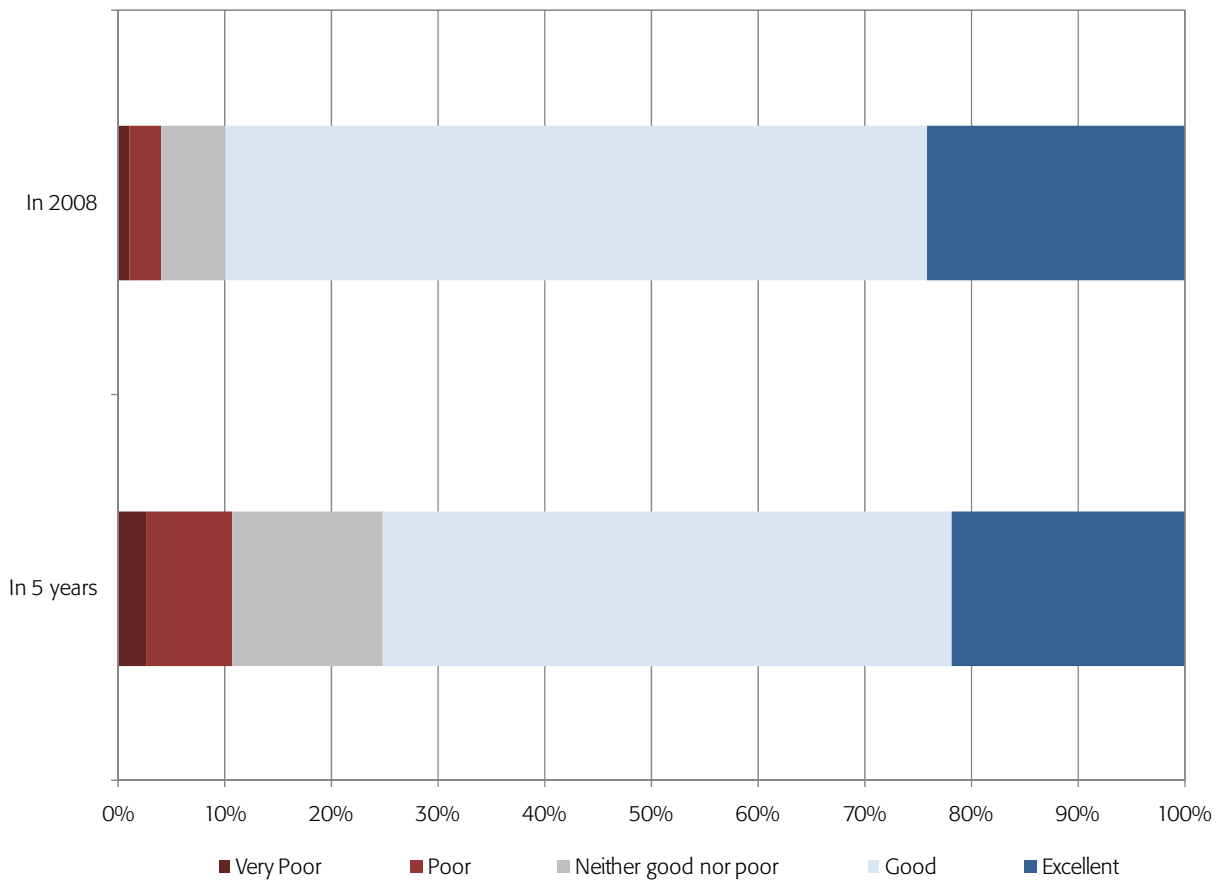
CITY OF TUMWATER STRATEGIC PLAN DEVELOPMENT

Summary of Economic Development Preferences Survey Results January 5, 2009

In the fall of 2008, PRR conducted an Economic Development Preferences Survey on behalf of the City of Tumwater. PRR surveyed 405 Tumwater residents asking them a variety of questions related to quality of life and economic development preferences and strategies. This high level summary of the results was prepared by Berk & Associates; PRR has provided a separate, more detailed summary.

GENERAL OUTLOOK QUESTIONS

How would you rate the quality of life in Tumwater?

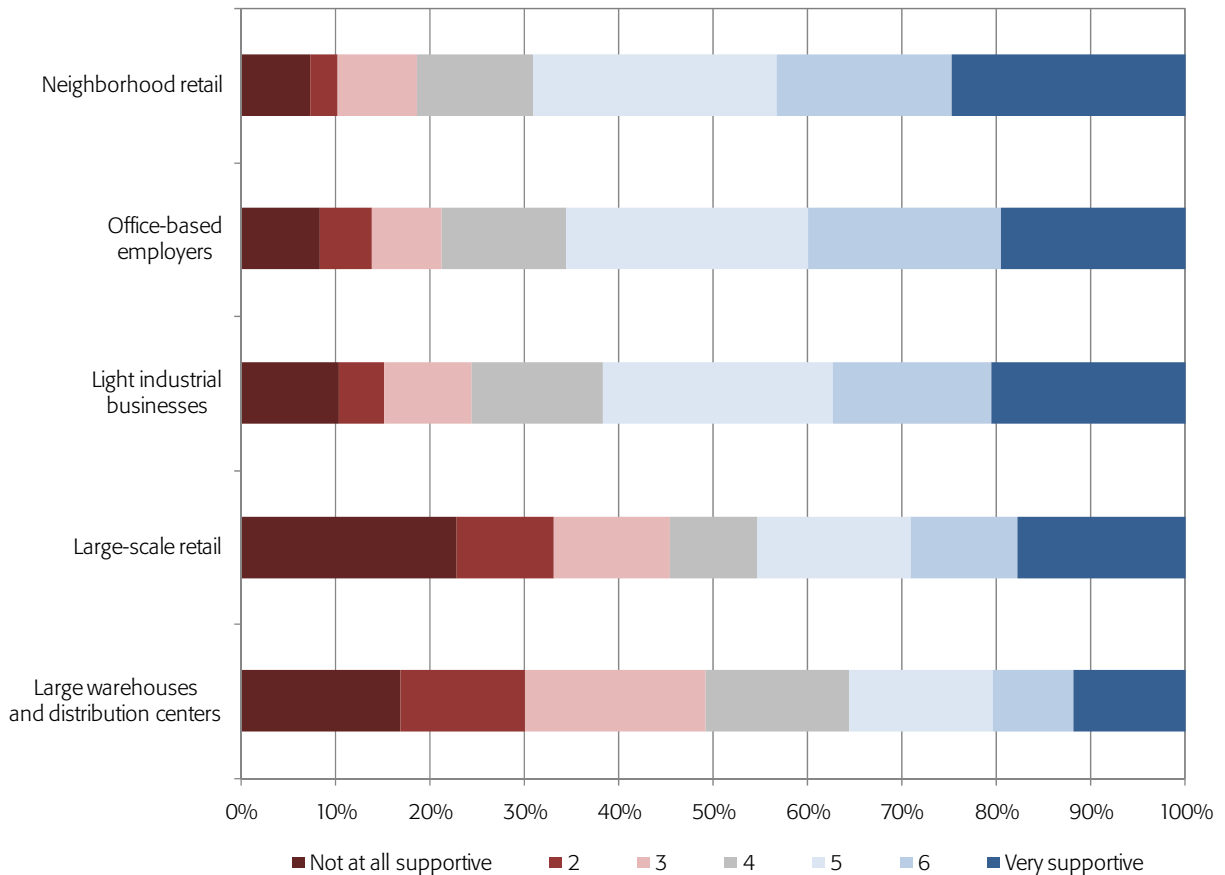


Considering population growth in Tumwater, would you say it is growing too fast, about right, or not fast enough?

About right	51.9%
Too fast	44.7%
Not fast enough	3.5%

TYPE AND LOCATION OF DEVELOPMENT QUESTIONS

If you knew the greatest impacts of this development type, how supportive would you be?



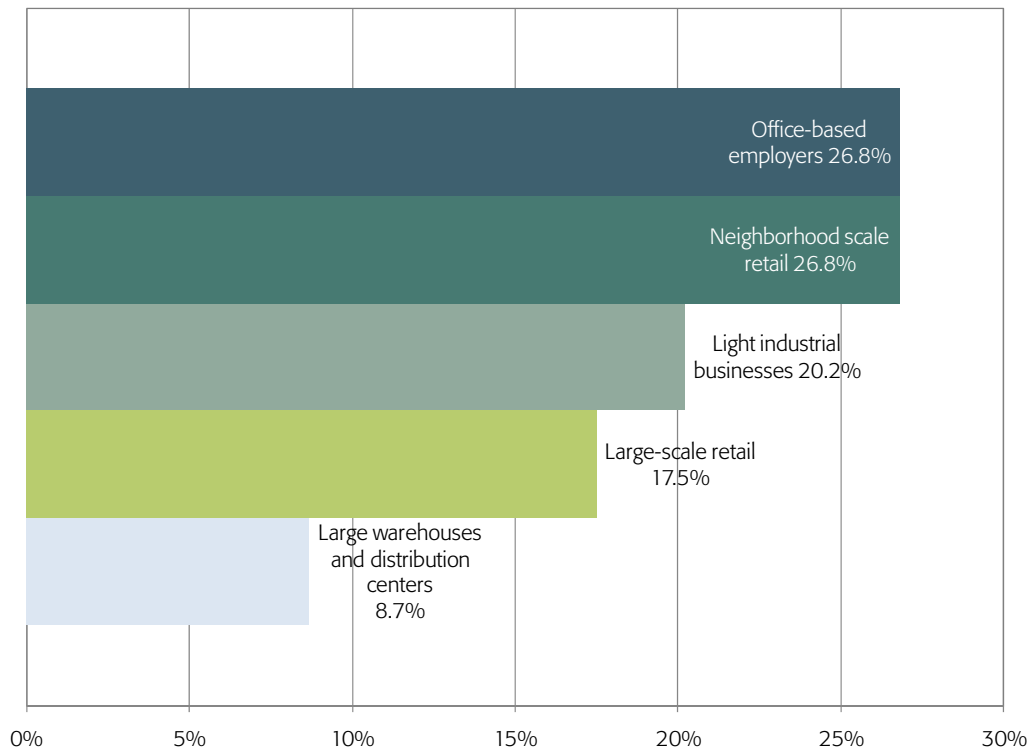
Type of Development	Not Supportive (1-3)	Neutral (4)	Supportive (5-7)
Neighborhood retail	18.6%	12.3%	69.1%
Office-based employers	21.1%	13.3%	65.6%
Light industrial businesses	24.4%	13.8%	61.8%
Large-scale retail	45.4%	9.3%	45.4%
<i>With geographic limit: I-5</i>	<i>33.9%</i>	<i>15.4%</i>	<i>50.6%</i>
Large warehouses and distribution centers	49.2%	15.2%	35.7%
<i>With geographic limit: I-5</i>	<i>30.2%</i>	<i>14.1%</i>	<i>55.7%</i>

How support for development types shifted after hearing the greatest impacts and defining the geographic location:

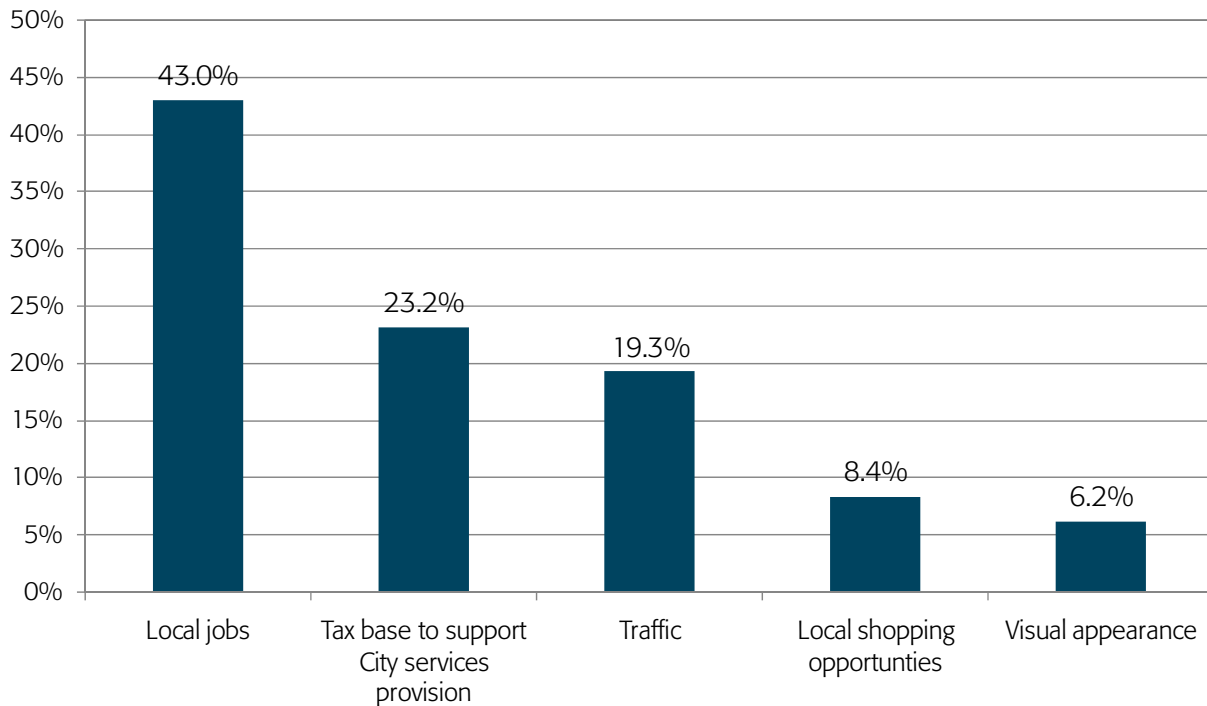
	Not supportive (1-3)	Neutral (4)	Supportive (5-7)
Neighborhood retail	↑ 1.6%	↓ 0.2%	↓ 1.4%
Office-based employers	↑ 5.2%	↑ 1.8%	↓ 7.0%
Light industrial businesses	↑ 0.8%	↑ 1.8%	↓ 2.7%
Large-scale retail	↑ 2.7%	↓ 1.0%	↓ 1.5%
Large warehouses and distribution centers	↑ 0.7%	↑ 1.2%	↓ 1.6%
<i>Large scale retail with geographic limit: 1-5</i>	↓ 8.8%	↑ 5.1%	↑ 3.7%
<i>Large warehouses and distribution centers with geographic limit: 1-5</i>	↓ 18.3%	↑ 0.1%	↑ 18.4%

Note: Values indicate the degree to which level of support shifted, expressed as an increase (↑) or decrease (↓) in percentage of responses. For example, the percentage of responses supportive of neighborhood retail shifted from 70.5% before hearing impacts to 69.1% after hearing impacts, and is reported in this table as ↓1.4% (70.5%-69.1%).

Of the five types of development, which two do you think are the most desirable?

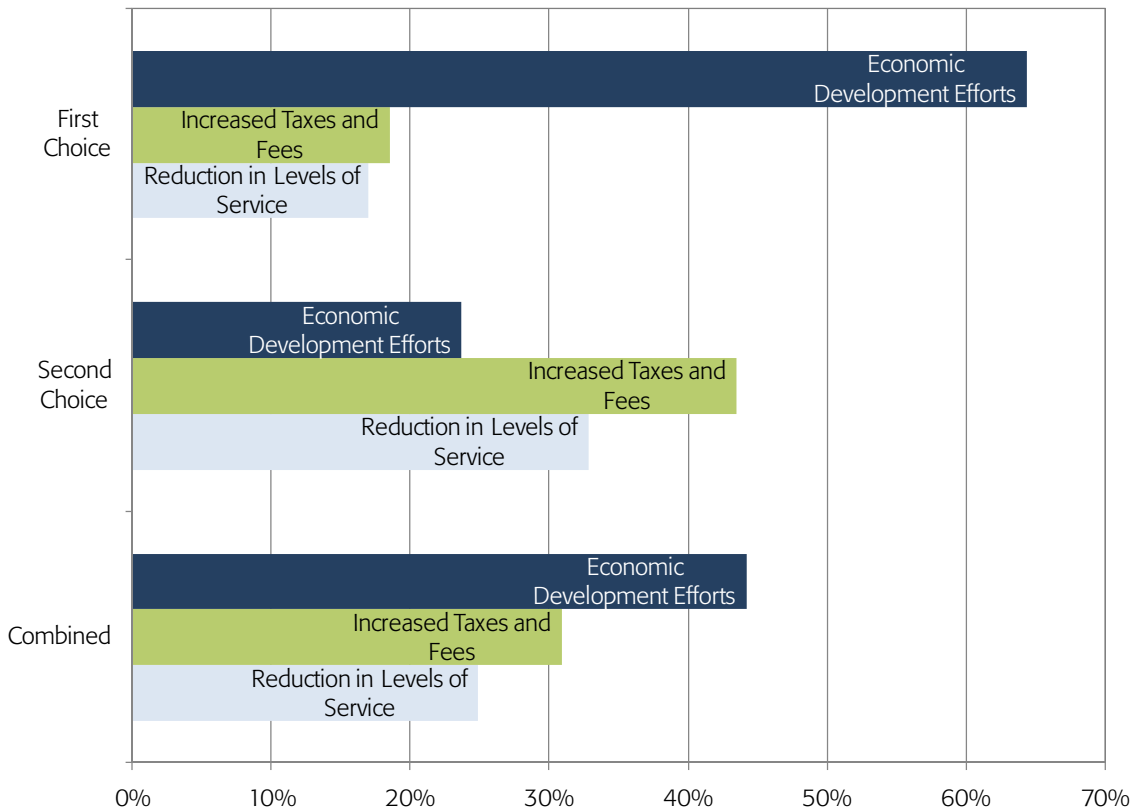


Of the following five factors, which would you rank as most important?

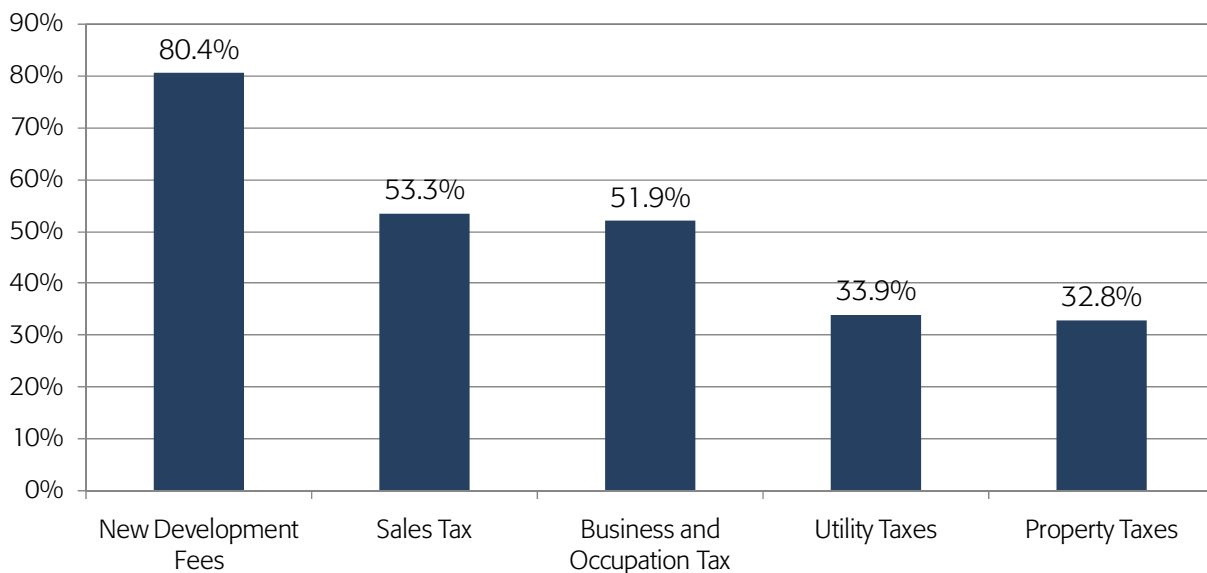


FISCAL STRATEGIES QUESTIONS

Which approach would you like the City to use to address the tight budget?



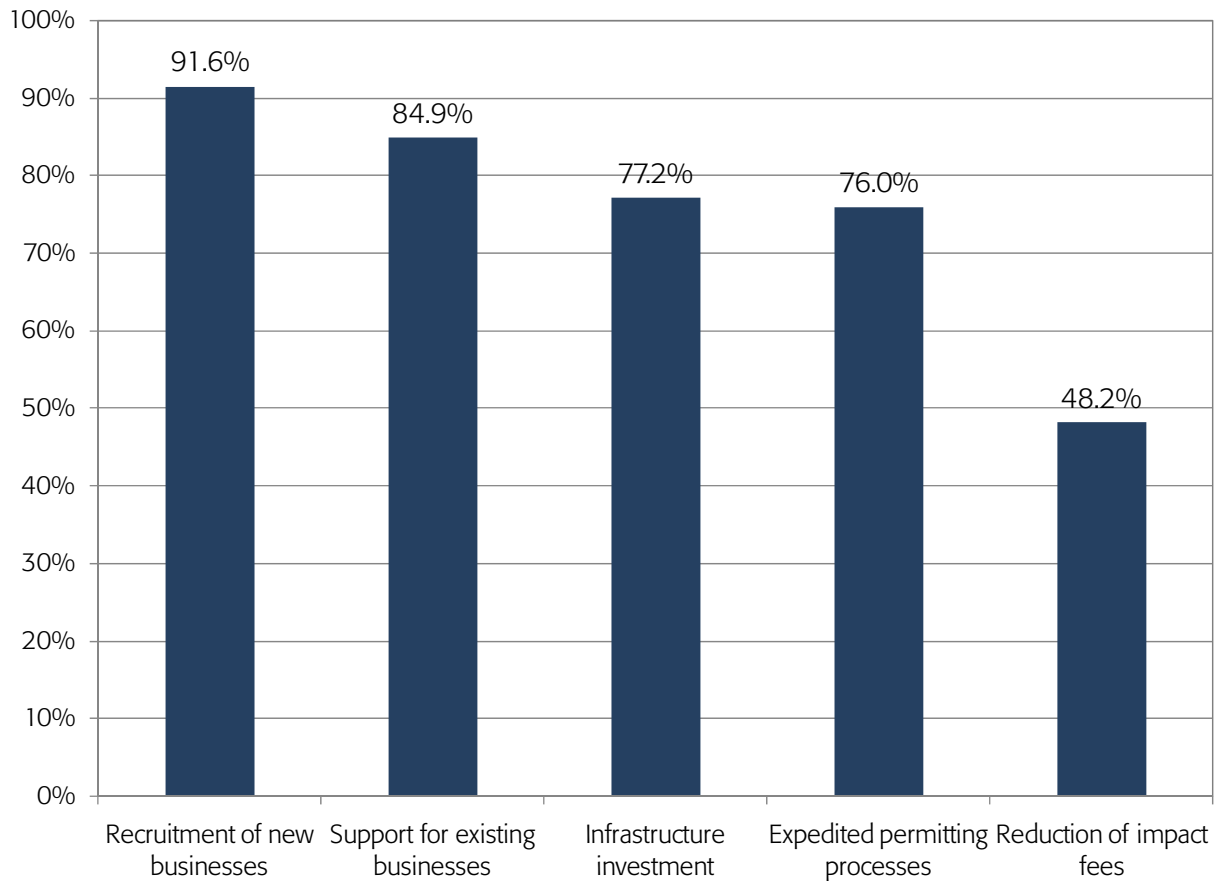
If the City was forced to raise taxes, which of the following would you support?



Which statement comes closest to your personal view?

The City should let the market determine what new businesses come to Tumwater.	51.6%
The City should invest staff time and dollars to recruit desirable new businesses.	48.4%

Which of the following tools would you like the City to use in pursuing economic development opportunities?



Note: Respondents who indicated “the City should let the market determine what new businesses come to Tumwater” in question 23 were not asked to respond to question 24.

Which of the following communication methods would be best to keep you informed about Tumwater’s economic development?

