

# Survey of Amenities Desired by Employees and Students in the Tri-Cities Research District

April 14, 2010

## 1.0 Introduction and Summary

As part of its effort to support development of the Tri-Cities Research District (TCRD, or the District, <http://www.tricityresearchdistrict.org/>) as a place for knowledge workers to work, live, play, and learn, Pacific Northwest National Laboratory's (PNNL) Economic Development Office conducted a voluntary survey of PNNL staff to identify the sorts of amenities that they would use within walking distance of the PNNL campus. Two months later, the TCRD conducted surveys of employees and college students throughout the district. The expectation is that real estate developers and other stakeholders will consider these survey results when recruiting businesses and services to the District, which will in turn assist staff and student recruiting and retention efforts throughout the District. While the TCRD has historically just been a place to work and attend classes, modern successful research parks are fully integrated communities that contain major research institutions as well as a broad array of supporting businesses and amenities (for examples, see the Centennial Campus, <http://centennial.ncsu.edu/> and the Southern Taiwan Science Park, <http://www.stsipa.gov.tw/web/WEB/Jsp/Page/cindex.jsp?frontTarget=ENGLISH&thisRootID=30>). The reason for this integrated approach is that research shows that the younger generation of knowledge workers desires to live, work, play, and learn all within walking distance. Toward that end, there are now three residential areas in the District, but more amenities are needed to meet the needs of workers, students, and residents.

The first major finding of this survey is that employees and students are concerned about having nearby amenities. Over 1,650 employees and students (1,020 PNNL employees, 138 WSU-TC employees and students, and 508 other TCRD employees) participated in this survey for a participation rate of about 24% among the 7,000 or so employees and students in the TCRD. This high response rate indicates that employees and students are interested in nearby amenities. The top amenities and services that employees and students would use are in the categories of restaurant, gas station, mail service, grocery store, fast food, convenience store, coffee shop, pharmacy/drug store, banking/financial, fitness/wellness center, and office supply store. Detailed results are attached.

## 2.0 Survey Methodology

At PNNL, the survey was administered through an internet link made available to all PNNL staff through *Inside PNNL*, a staff newsletter that is electronically delivered to PNNL staff twice per week. The responses were collected anonymously using the electronic survey tool, Vovici.

At other TCRD employers and at WSU-TC, an e-mail was sent to executive offices with a request to forward it to employees and students. The e-mail contained a link to the web-based survey. Announcements with the survey link were also made in various newsletters to employees and students in the District. This survey used the Survey Monkey website.

The respondents were invited to consider 28 different amenities and indicate how often they would use that amenity if it were within walking distance of their work/school location (frequently, occasionally, wouldn't use), and were given an opportunity to indicate if they didn't want the amenity nearby. For each of the amenities, the respondents were also invited to indicate specific businesses or brands that they prefer offer that service. A copy of the survey tool used at PNNL can be found in Appendix 1. The survey used for the rest of the TCRD is slightly different, and can be found in Appendix 2. The responses were collected anonymously and tabulated as counts and percentages. Additionally, verbatim responses were collected when respondents wrote in a specific business name or comment.

## 3.0 Observations and Conclusions

The survey results are presented in Appendix 3, ranked in order of each category's combined scores of frequent and occasional use. By this measure, the top amenities and services, in decreasing order, are restaurant, gas station, mail service, grocery store, fast food, convenience store, coffee shop, pharmacy/drug store, banking/financial, fitness/wellness center, and office supply store. Each of these categories was cited for frequent or occasional use by at least 60% of the survey participants. The most desired amenity is restaurants, with 93% of respondents indicating frequent or occasional use. Restaurants also had the highest score for occasional use (61%). The categories with the highest percentage of respondents indicating frequent use is gas station and coffee shop both at 43%. To help identify the use pattern of each category, the ratio of frequent use to occasional use was calculated for each. By this measure, coffee shop scored the highest, with a ratio of 1.18, though fitness/wellness center was close behind at 1.16. The highest score in each column of the attachment is bolded.

There are some other observations that can be made from these survey results. First, the specific brands that led their respective top categories are Red Robin, Shell, U.S. Post Office, Trader Joe's, Subway, 7-11, Starbucks, CVS, Gesa Credit Union, 24 Hour Fitness Club, and Office Max. The brand that led across all categories is Starbucks with 205 respondents suggesting it by name, followed by Gesa with 147 respondents suggesting it. Second, another indication that there is strong interest in more nearby amenities among employees and students is that this survey resulted in an unusually high number of comments for a multiple-choice survey. Third, there were three categories that more than 20% of the participants stated should not be located nearby: 23% oppose a winery 21% oppose a microbrewery, and 20% oppose a bar . That said,

more than twice as many participants would use a microbrewery or bar frequently or occasionally as are opposed to them, and more than 1-1/2 times as many would use a winery as are opposed to it. For these categories, there were generally more comments voicing support than opposition.

From the high participation rate (24%) to this voluntary survey, it is concluded that employees and students in the TCRD are interested in what businesses/amenities are located nearby. It is also concluded that more retail establishments and services would be well-received by the employees and students, especially restaurants, a gas station, mail service, a grocery store, and fast food, all with greater than 85% expected frequent or occasional use. Another conclusion is that employees and students would like a Starbucks coffee shop and a Gesa Credit Union nearby.

Appendix 1  
PNNL Survey Instrument

## Amenity Survey

As PNNL’s Economic Development Office and the Tri-Cities Research District work to implement the recently completed master plan for the core of the District (the area between PNNL and the WSU Tri-City Campus), we expect to receive proposals from real estate developers to build various amenities such as food service, recreational facilities, retail, etc. To guide our responses to such proposals, we would like to know which amenities PNNL staff desire. Please fill out the survey to tell us which amenities YOU would use if they were within walking distance from your work location.

The survey will take approximately 5 minutes to complete.

If you have a preference regarding which companies provide the service, please indicate the names in the spaces provided.

*NOTE: This survey instrument does not accept special characters (e.g. ~, ', -, @). Please avoid these in your answers.*

### Food & Beverage

	Would use it frequently	Would use it occasionally	Wouldn't use it	Don't want it	If you have a preference regarding which companies provide the services, please indicate the names in the spaces provided
Restaurant	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Fast Food	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Coffee Shop	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Winery	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Microbrewery	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>

## Professional Services

	Would use it frequently	Would use it occasionally	Wouldn't use it	Don't want it	If you have a preference regarding which companies provide the services, please indicate the names in the spaces provided
Banking/Financial Services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Attorney/Accountant, etc.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>

## Health & Beauty

	Would use it frequently	Would use it occasionally	Wouldn't use it	Don't want it	If you have a preference regarding which companies provide the services, please indicate the names in the spaces provided
Fitness/Wellness Center	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Urgent Care	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Dentist	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Optician	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Hair Salon/Barber Shop	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Nail Salon	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>

## Recreation/Entertainment

	Would use it frequently	Would use it occasionally	Wouldn't use it	Don't want it	If you have a preference regarding which companies provide the services, please indicate the names in the spaces provided
Indoor Recreational Facilities (bowling, darts, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Outdoor Recreational Facilities (soccer, golf, kayak launch, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Entertainment Venue (theatre, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>

## Home & Family

	Would use it frequently	Would use it occasionally	Wouldn't use it	Don't want it	If you have a preference regarding which companies provide the services, please indicate the names in the spaces provided
Childcare Services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Dry Cleaning/Laundry Service	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Pet Grooming/Care	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Residences	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>

## Shopping

	Would use it frequently	Would use it occasionally	Wouldn't use it	Don't want it	If you have a preference regarding which companies provide the services, please indicate the names in the spaces provided
Supermarket/Grocery	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Convenience Store	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Pharmacy/Drug Store	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Hardware Store	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>

## Other Services

	Would use it frequently	Would use it occasionally	Wouldn't use it	Don't want it	If you have a preference regarding which companies provide the services, please indicate the names in the spaces provided
Florist	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Automotive Maintenance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Gas Station	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Mail/Parcel/Office Services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>

If we have not included a service or amenity that is important to you, please list it here.

# Campus Amenity Preferences

## 1. What shops, stores and services do you want near campus?

Have you found yourself wanting to take a break to pick up a birthday card, drop off dry cleaning, or pick up a prescription but didn't want to drive into town?

WSU Tri-Cities is part of the Tri-Cities Research District which receives inquiries from developers to build various amenities such as food service, recreational facilities, retail, etc.

To guide our responses, we would like to know which amenities are most desired.

Please take a few minutes to tell us which amenities YOU would use if they were close to campus.

### 1. Food and Beverages

	Would use frequently	Would use occasionally	Wouldn't use	Don't want it
Restaurant	jñ	jñ	jñ	jñ
Fast Food	jñ	jñ	jñ	jñ
Coffee Shop	jñ	jñ	jñ	jñ
Winery	jñ	jñ	jñ	jñ
Bar	jñ	jñ	jñ	jñ
Microbrewery	jñ	jñ	jñ	jñ
Grocery Store	jñ	jñ	jñ	jñ
Convenience Store	jñ	jñ	jñ	jñ

If you have a preference for which company should provide any of the services above, please list their name(s):

### 2. Professional Services

	Would use frequently	Would use occasionally	Wouldn't use	Don't want it
Banking/Financial Services	jñ	jñ	jñ	jñ
Attorney	jñ	jñ	jñ	jñ
Accountant	jñ	jñ	jñ	jñ

If you have a preference for which company should provide any of the services above, please list their name(s):



## Campus Amenity Preferences

### 3. Health and Beauty

	Would use frequently	Would use occasionally	Wouldn't use	Don't want it
Fitness/Wellness Center	jñ	jñ	jñ	jñ
Urgent Medical Care	jñ	jñ	jñ	jñ
Dentist	jñ	jñ	jñ	jñ
Optician/Optomtrist	jñ	jñ	jñ	jñ
Pharmacy/Drug Store	jñ	jñ	jñ	jñ
Personal/Mental Health Counseling	jñ	jñ	jñ	jñ
Hair Salon/Barber Shop	jñ	jñ	jñ	jñ
Nail Salon	jñ	jñ	jñ	jñ

If you have a preference for which company should provide any of the services above, please list their name(s):

### 4. Indoor Recreation and Entertainment

	Would use frequently	Would use occasionally	Wouldn't use	Don't want it
Billiards	jñ	jñ	jñ	jñ
Darts	jñ	jñ	jñ	jñ
Ping Pong	jñ	jñ	jñ	jñ
Bowling	jñ	jñ	jñ	jñ
Basketball	jñ	jñ	jñ	jñ
Raquetball	jñ	jñ	jñ	jñ
Movie theater	jñ	jñ	jñ	jñ

If you have a preference for which company should provide any of the services above, please list their name(s):

### 5. Outdoor Recreation and Entertainment

	Would use frequently	Would use occasionally	Wouldn't use	Don't want it
Basketball	jñ	jñ	jñ	jñ
Soccer	jñ	jñ	jñ	jñ
Golf	jñ	jñ	jñ	jñ
Kayak launch	jñ	jñ	jñ	jñ

If you have a preference for which company should provide any of the services above, please list their name(s):

## Campus Amenity Preferences

### 6. Home and Family

	Would use frequently	Would use occasionally	Wouldn't use	Don't want it
Child Care	jñ	jñ	jñ	jñ
Pet Care/Grooming	jñ	jñ	jñ	jñ
Laundry/Dry Cleaning	jñ	jñ	jñ	jñ
Florist	jñ	jñ	jñ	jñ
Mail/Parcel Shipping Store	jñ	jñ	jñ	jñ
Office Supply Store	jñ	jñ	jñ	jñ
Hardware Store	jñ	jñ	jñ	jñ
Gas Station	jñ	jñ	jñ	jñ
Automotive Maintenance	jñ	jñ	jñ	jñ
Residences	jñ	jñ	jñ	jñ

If you have a preference for which company should provide any of the services above, please list their name(s):

7. If we have not included a service or amenity that is important to you, please list it here.

Thank you for your feedback.

Appendix 3  
Tri-City Research District Survey Results

	Would Use It Frequently	Would Use It Occasionally	Wouldn't Use It	Don't want it	Would Use It Frequently or Occasionally	Ratio of Frequent Use to Occasional Use	Top 5 Specific Businesses Named	Most Frequent Comments Other Than Business Names
<b>Restaurant</b>	32%	<b>61%</b>	6%	2%	93%	0.53	Red Robin (32) Chilis (30) Applebees (17) TGI Fridays (16) Olive Garden (11)	Deli/Sandwich/Soup (25) Mexican (21) Chinese/Asian (15) Pizza (10) Thai (8)
<b>Gas Station</b>	<b>43%</b>	45%	8%	3%	89%	0.96	Shell (14) Chevron (13) Conoco (7) Exxon (6) Costco (3)	low cost (8) any brand (4) not necessary (4) diesel (4)
<b>Mail / Parcel / Office Services</b>	31%	56%	11%	2%	87%	0.55	US Post Office (15) UPS (13) Fed-Ex (6) Kinko's (4)	good to have (11) don't need (3)
<b>Supermarket / Grocery</b>	39%	47%	10%	3%	87%	0.83	Trader Joe's (36) Yokes (30) Whole Foods (21) Winco (18) Fred Meyer (14)	convenient for meetings (4) not necessary (3) too much traffic (3) anything with low prices (2)
<b>Fast Food</b>	36%	49%	8%	7%	85%	0.74	Subway (75) McDonalds (48) Wendy's (36) Taco Bell (34) Quizno's (22)	food court; aesthetically pleasing; healthy choices
<b>Convenience Store</b>	31%	53%	11%	4%	84%	0.58	7-11 (8) Sunmart (5) Walgreen (4)	nice to have (7) don't need (2) food/gas combination store

Bold signifies highest percentage in each column.

\* Does not include input from PNNL employees.

\*\* Consolidates more detailed information from WSU staff and students and non-PNNL TCRD employees.

Appendix 3  
Tri-City Research District Survey Results

	Would Use It Frequently	Would Use It Occasionally	Wouldn't Use It	Don't want it	Would Use It Frequently or Occasionally	Ratio of Frequent Use to Occasional Use	Top 5 Specific Businesses Named	Most Frequent Comments Other Than Business Names
<b>Coffee Shop</b>	<b>43%</b>	37%	16%	4%	80%	1.18	Starbucks (205) Barracuda's (16) Tully's (12) Dutch Brothers (9) Roasters (7)	local (11) "not Starbucks" (10) place to sit down (4) wi-fi available (5) sandwiches available (4)
<b>Pharmacy / Drug Store</b>	22%	55%	19%	4%	77%	0.41	CVS (30) Walgreens (23) Rite Aid (18)	not needed (9) nice to have (4)
<b>Banking / Financial Services</b>	30%	45%	20%	4%	75%	0.67	Gesa (147) HAPO (69) Bank of America (60) Chase (29) US Bank (24)	The HAPO comments were mostly expressing how pleased they were that there was a presence in the research district
<b>Fitness / Wellness Center</b>	34%	29%	33%	3%	64%	1.16	24 Hour Fitness Club (17) Columbia Basin Raquet Club (15) Golds (7) Battelle fitness room (5) Broadmoor Fitness (4)	swimming pool (9) reasonably priced (7) strength training equip (5) locker rooms/showers (3)
<b>Office Supply Store</b>	11%	53%	32%	4%	64%	0.21	Office Max (2) Office Depot	*
<b>Urgent Care</b>	5%	55%	36%	5%	59%	0.08	Kadlec Clinic (8) KGH Clinic (5) Physician's IC (3)	
<b>Florist</b>	4%	55%	36%	5%	59%	0.08	not enough consensus to list	about half thought it would be nice, about half thought not necessary and couldn't be supported

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Appendix 3  
Tri-City Research District Survey Results

	Would Use It Frequently	Would Use It Occasionally	Wouldn't Use It	Don't want it	Would Use It Frequently or Occasionally	Ratio of Frequent Use to Occasional Use	Top 5 Specific Businesses Named	Most Frequent Comments Other Than Business Names
<b>Entertainment Venue (theatre, etc.)</b>	16%	43%	36%	6%	58%	0.37	Fairchild Cinema (7) IMAX (2) Carmike (2)	movie theatre (13) Live music venue (3) concern over drawing enough population to support (2)
<b>Dry Cleaning / Laundry Service</b>	16%	42%	37%	5%	58%	0.37	New City Cleaners (5)	would be great (7) green/organic (2)
<b>Hardware Store</b>	9%	48%	37%	5%	58%	0.19	Ace (10) Lowe's (3) Home Depot (3)	no big-box stores (2) not necessary (4) nice to have (3)
<b>Automotive Maintenance</b>	9%	45%	40%	6%	54%	0.21	Les Schwab (6) Quick Lube (3) Motoring Services (3) Cronks (3)	any with a good service rating (7) don't need (2)
<b>Microbrewery</b>	13%	35%	32%	21%	48%	0.37	Ice Harbor (19) Atomic Ale (14) McMenamins (6)	Have food available; Most comments were positive but 13 specific comments against a brewery presence
<b>Bar</b>	10%	34%	36%	20%	44%	0.28	none specifically listed (or already captured under restaurant)	*
<b>Indoor Recreational Facilities (bowling, darts, etc.)</b>	9%	34%	50%	6%	43%	0.27	not enough consensus to list	**

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Appendix 3  
Tri-City Research District Survey Results

	Would Use It Frequently	Would Use It Occasionally	Wouldn't Use It	Don't want it	Would Use It Frequently or Occasionally	Ratio of Frequent Use to Occasional Use	Top 5 Specific Businesses Named	Most Frequent Comments Other Than Business Names
<b>Outdoor Recreational Facilities (soccer, golf, kayak launch, etc.)</b>	12%	31%	51%	6%	43%	0.39	Kayak Rental/Launch (21) Golf Driving Range (18) 9-hole golf course (6) Park w/tables (6)	**
<b>Hair Salon / Barber Shop</b>	8%	31%	52%	9%	39%	0.24	Great Clips (4) not enough consensus on the others to list	roughly half thought it would be convenient; other half indicated they wouldn't switch from current stylist
<b>Winery</b>	7%	31%	40%	<b>23%</b>	38%	0.22	not enough consensus to list	local; live music; combine with an eating establishment; wine tasting featuring multiple wineries and wine shop; comments were evenly distributed between those that didn't want it and those that did
<b>Optician</b>	4%	32%	57%	8%	35%	0.12	not enough consensus to list	most comments indicated a concern over benefit plan coverage
<b>Dentist</b>	5%	26%	61%	8%	31%	0.18	not enough consensus to list	most comments indicated the respondent had a dentist and wouldn't switch, but would go if their dentist moved out here

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Appendix 3  
Tri-City Research District Survey Results

	Would Use It Frequently	Would Use It Occasionally	Wouldn't Use It	Don't want it	Would Use It Frequently or Occasionally	Ratio of Frequent Use to Occasional Use	Top 5 Specific Businesses Named	Most Frequent Comments Other Than Business Names
<b>Nail Salon</b>	8%	19%	60%	13%	26%	0.41	not enough consensus to list	only a few indicated they would use this type of service
<b>Childcare Service</b>	11%	10%	73%	6%	21%	1.04	not enough consensus to list	most comments suggested that having childcare options available would be good. Also wanted something that was affordable (lower cost than Kindercare)
<b>Pet Grooming / Care</b>	4%	14%	73%	9%	17%	0.28	not enough consensus to list	doggy day care (3) don't have pets (3) kennel service (2)
<b>Residences</b>	8%	9%	65%	18%	17%	0.89	not enough consensus to list	affordable housing (9) apartments (3) condos (3) homes with yards (2) only if other amenities to go with it
<b>Person/Mental Health Counseling</b>	2%	12%	<b>78%</b>	8%	14%	0.16	none specifically listed	*
<b>Attorney / Accountant, etc.</b>	1%	10%	75%	14%	11%	0.10	not enough consensus to list	**

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