

Appendix I: Business Survey Report

September 2012



College Station, Texas



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Survey Responses

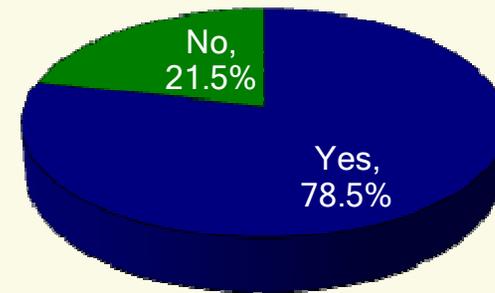
Q1–Qualification for the Survey

The focus of this survey was to gauge the attitudes and preferences of the top business decision-makers in the College Station area. Therefore the first question asked them to declare that they were the owner or top manager of a business or institution.

- A total of 135 persons began the survey
- 21.5% (29) of the respondents were not owners or top managers and were not surveyed further.
- 78.5% (106) were owners or top managers and continued the survey

Qualifying Question

Do you own or serve in an upper management capacity at a business or institution in the College Station / Bryan area?



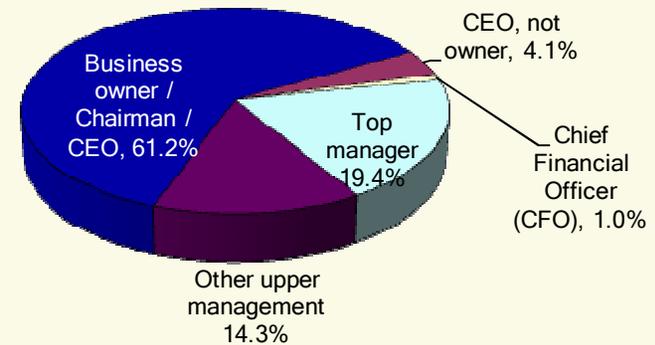
Q2–Position in the Company

In Question 2, the respondents were asked their position within the company or institution.

- Almost two-thirds of the respondents were owners or Chief Executive Officers (CEO);
- 20% were top managers; and
- 14.3% had other upper management positions.

Position in the Company

What is your position in the organization?



Q3—Organization Description

In Question 3, the respondents were asked about the nature of their local operation.

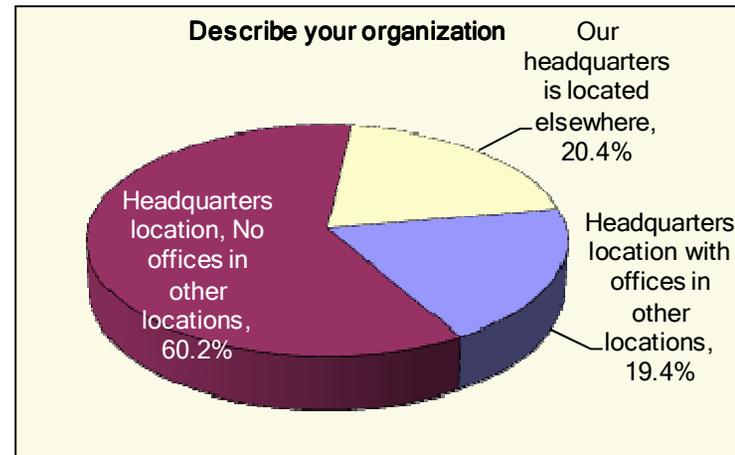
- Almost 80% of the respondents stated that their local office was the headquarters location for the business or institution and
- 60.2% of those had no other locations.

Q4—Where is the Business or Institution?

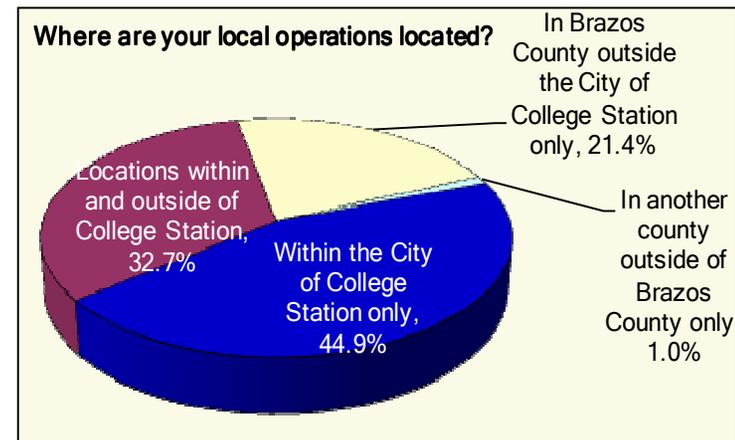
In Question 4, the respondents were asked about the location of their local operation.

- More than three out of four respondents’ businesses were located in College Station (77.6%);
- The bulk of the remainder (21.4%) were located within Brazos County, outside of College Station and
- Only 1% were outside of Brazos County.

Headquarters and Other Location



Location in College Station/Brazos Area

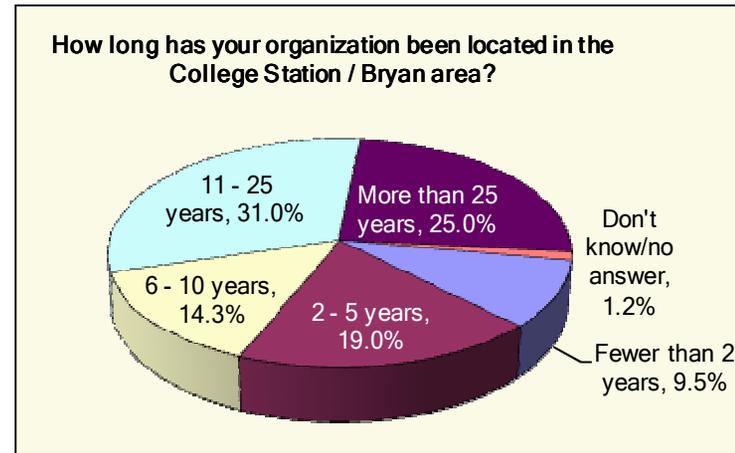


Q5–How Long in College Station Area?

In Question 5, the respondents were asked about the length of time that the business has been located in the area.

- The respondents represented a good mix of tenure;
- Over half (56%) of the respondents' businesses have been located in the area 10 years or more;
- One-fourth have been operating in the area for more than 25 years; and
- 9.5% are new to the area (less than 2 years).

Tenure in College Station Area



Q6–What industry Sector?

In Question 6, the respondents were asked “In what industry is your organization? [Please select the one sector that most closely fits your business].”

The respondents represent a broad cross section of the business sectors in the area:

- When compared to the actual 2010 count of Brazos County establishments from the Census, only “Education and Health Services”, “Retail Trade” and “Mining, logging and construction” seem to be underrepresented.
- The “Other” category was selected by 23/8% of the respondents who could not select one of the categories above for their business.

Industry Sector of Respondents

% of survey responses compared with Brazos County establishments from County Business Patterns 2010

	County %.	Survey %
Mining, logging, and construction	11.4%	3.6%
Manufacturing	2.5%	2.4%
Wholesale trade	3.6%	1.2%
Retail trade	16.7%	10.7%
Transportation, warehousing, and utilities	2.0%	1.2%
Information (journalism, media and entertainment, telecommunications)	1.8%	6.0%
Financial activities	12.0%	9.5%
Professional and business services	16.5%	17.9%
Educational and health services	12.1%	3.6%
Leisure and hospitality	11.6%	8.3%
Other services	9.2%	6.0%
Government	n/a	1.2%
Nonprofits and charities (not included above)	n/a	4.8%
Other (please specify)	n/a	23.8%

Following is a list of the descriptions those respondents used in the “Other” category to describe their business.

- | | |
|--|---|
| Real Estate & Multifamily, Real Estate Brokerage and Development (4) | Oil Industry Service Company & Laboratory |
| Computer software Business Technology Integration (3) | Hair salon |
| Insurance agency (2) | Pet services |
| Restaurant (2) | Property Management |
| Builder Supply | Title insurance agency |
| Daycare Center | Tourism/Hotel |
| Engineering / Manufacturing | |

Q7–Q9- Size of Business

In Question 7, the respondents were asked their annual gross revenue.

- The respondents represent a broad cross section of the business sizes from very small (less than \$500,000 annual gross revenue) to the large (more than \$20 million annually).

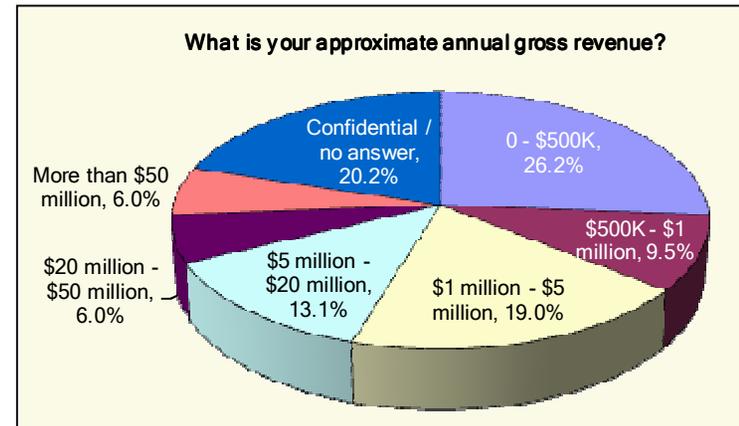
In Question 8, the respondents were asked “How many people are employed by your organization inside the U.S.?”

In Question 9, the respondents were asked “How many people are employed by your organization in the College Station / Bryan area?”

The results for those two questions are show in the box on the bottom right

- More than half of the respondents reported that they represented small operations within the College Station/Bryan area
- Within Brazos County, according to the U.S. Census, County Business Patterns, 83.8% of the establishments had 19 or fewer employees;
- Therefore the respondents to this survey, while significantly including small operations, represented a higher proportion of large businesses than would be expected in Brazos County.

Business Revenue



Number of Employees

Number of Employees	Question 8 Inside the U.S.	Question 9 In CS/B Area
Fewer than 25	54.8%	56.0%
25 to 99	14.3%	13.1%
100 to 499	13.1%	17.9%
500 to 999	1.2%	10.7%
1,000 or more	14.3%	1.2%
No answer / don't know	2.4%	1.2%

Q10–Market Area Covered?

In Question 10, the respondents were asked “Over how wide a market area does your organization in the College Station / Bryan area serve customers or clients?” They were allowed to select more than one geographic market.

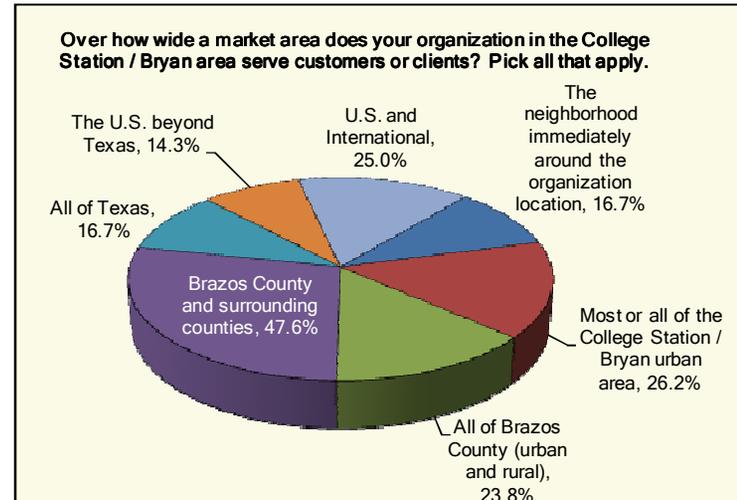
- Almost half were focused primarily on the College Station/Bryan region
- Fewer than half of the respondents indicated they serve customers outside Texas

Q11–Reasons for Location in College Station?

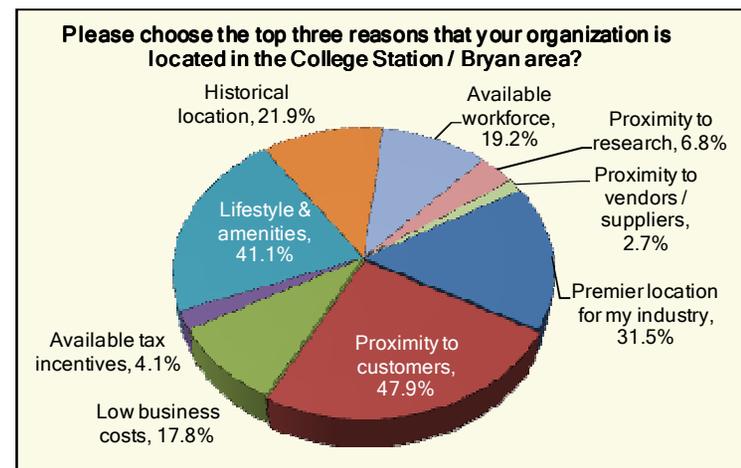
In Question 11, the respondents were asked the top reasons why they are located in the College Station area.

- The most often mentioned reason was “Proximity to Customers” with almost one half of the mentions;
- “Lifestyle and Amenities” was second most mentioned reason – suggesting that College Station has positive lifestyle attributes attractive to business; and
- Incentives were the least mentioned reason for being in College Station.
- Firms with a location within the City of College Station differed from the overall sample in that they more frequently cited “Premier location for my industry” (38.9%) and “Proximity to customers” (55.6%). They were less likely to cite “Low business costs” (13.0%).
- Respondents whose businesses serve customers outside Texas were more likely to cite “Lifestyle and Amenities” (58.3%).

Geographic Market Area



Reasons for Location in College Station/Bryan Area



Q12–How many new employees

In Question 12, the respondents were asked , “How many employees did you hire in the last 12 months in the College Station/Bryan Area?”

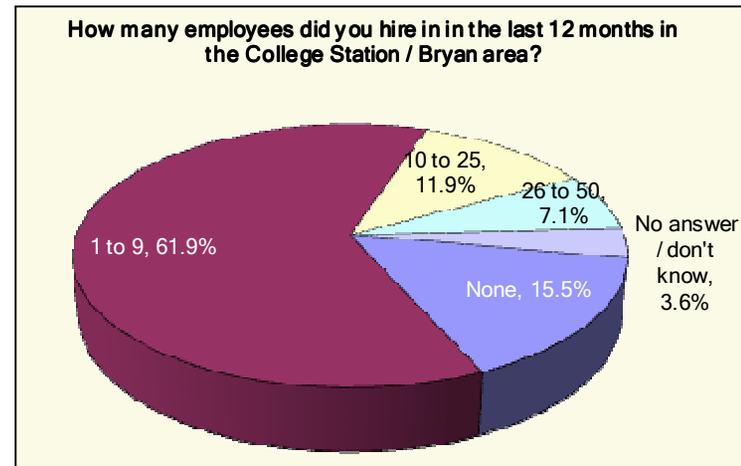
- A surprising 80% of those who responded to this question hired employees in the past year;
- 18% hired more than 9 employees;

Q13–Where do you recruit workers?

In Question 13, the respondents were asked “From where do you obtain the bulk of your executive and upper management staff?” The question asked for the recruitment location of both Executive and Upper Management as well as Middle Management and General Staff.

- In both cases over one half of the total responding businesses rely on local permanent residents for new employees; the figure is lower for businesses with locations in College Station (48.4%).
- For Executive and Upper Management, one in four companies recruits outside of the College Station/Bryan area.
- For Middle Management and General staff, almost 30% of the companies recruit from Texas A&M.

Recent Employees Hired



From Where are Staff Recruited

	Executive and Upper Management Staff	Middle Management and General Staff
Enrolled college students living in College Station and Bryan	6.3%	18.8%
Newly graduated college students in College Station and Bryan	5.1%	10.0%
Permanent residents of College Station and Bryan	59.5%	55.0%
Residents of rural areas and other towns near College Station and Bryan	3.8%	3.8%
Other areas of Texas	19.0%	5.0%
Rest of U.S. outside of Texas	3.8%	5.0%
Outside the U.S.	2.5%	2.5%

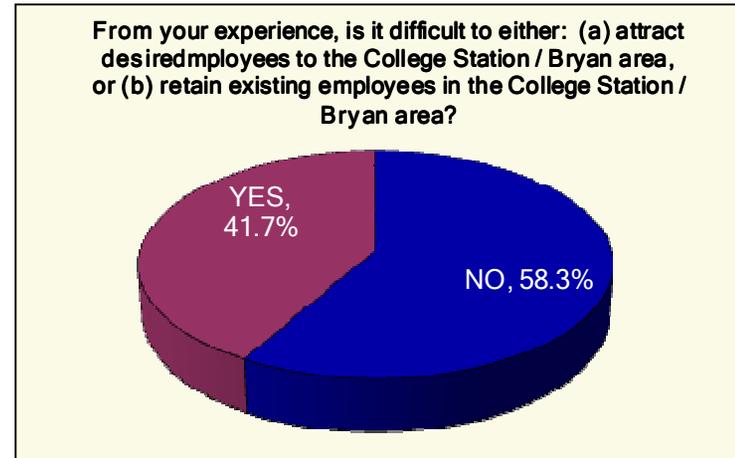
Q14–How Difficult to Hire and Retain Employees?

In Question 14, the respondents were asked,

“From your experience, is it difficult to either: (a) attract desired employees to the College Station / Bryan area, or (b) retain existing employees in the College Station / Bryan area? In other words, do you find the existing or potential employees are more likely to prefer living and working in other metropolitan areas?”

- A majority of the firms expressed no problem in attracting employees and
- However, more than two out of five respondents did express difficulty in hiring or retaining employees. Over half of respondents whose businesses sold to customers outside Texas (53.6%) gave this answer.

Hiring and Retaining Employees



Q15–Reasons for Difficulty in Hiring and Retaining?

In Question 15, the respondents who answered Question 14 as YES were asked the top reasons why they are having difficulty hiring and

Reasons for Difficulty in Hiring and Retaining Employees

Answer Options	Response Percent
The College Station / Bryan area does not offer enough social and recreational activities for young adults.	44.1%
Employees want more local career advancement opportunities for themselves than what College Station / Bryan offers.	38.2%
The College Station / Bryan area is too oriented toward college students.	38.2%
My company or organization does not offer pay levels competitive with similar jobs in other metropolitan areas.	26.5%
The spouses of employees want more local career advancement opportunities for themselves than what College Station/Bryan offers.	26.5%
College Station / Bryan does not offer adequate commercial air service to other places.	23.5%
Employees and their families prefer the shopping, services, and amenities of a larger metropolitan area.	17.6%
College Station / Bryan does not offer the right kinds of housing types or neighborhood environments.	8.8%

retaining employees. The table below presents the responses to the offered reasons.

Respondents with business locations inside the City of College Station differed from the overall totals in some respects. They were more likely to cite lower pay levels (32.0%) and career advancement opportunities (44.0%) and less likely to cite career opportunities for spouses (16.0%).

Five respondents listed “Other” reasons. They were:

- No housing for young professionals
- Employees complain the area is oriented too much toward families with children
- Burn out because they went to school here. Also, the oppressive summer and fall heat
- Too many small businesses. A&M does not outsource work that would attract businesses to serve A&M and CS
- Our market does not pay the same as larger markets for the services we provide so employees have to make a lifestyle choice to take a job here. Less money for a better quality of life.

Q16–Skills That Need Improvement?

In Question 16, the respondents were asked what skills should be improved through the education and training of their employees in order to better serve their businesses. They were asked to list a “Top” needed skill, as well as a second “Next” needed skill and a third “Other” needed skill if they so chose. The answers given are listed in the table below:

Top Skills That Employees Need to Improve

Top	Next	Other
Accounting/finance skills (2)	Accounting	bookkeeping
better jobs	attention to detail	cash handling
business acumen	Availability to work at night	Communication (4)
Business Management	bookkeeping	Computer (2)
cdl drivers	Communication skills (2)	critical thinking/ability to be open minded
Chemists	computer skills (7)	Easily trained
Clerical	Credit skills	English Language
Communication (5)	Critical thinking	Ethical
Computer skills (6)	Customer Service (2)	Financial
Customer Service (4)	desire for advancement	Food Prep
Driving/Driver's License	desire to be a team player (2)	General professional development
Engineering focused in telecommunications	Entrepreneurship	Leadership
Financial Analysis (3)	Fallow orders	Marketing skills
general math	Hospitality	motivated
general work skills for young adults	Independent problem solving	N/A (8)

Top	Next	Other
honesty and integrity (2)	Leadership (2)	Network Administration
Hospitality	Machine Operation	other technology skills
how to work	Management (4)	Patience
Industry specific training	Marketing and communications (2)	People skills
leadership	Maturity	Physical
Management	Mental	Positive attitude and willingness to be loyal and work hard
Managerial Skills	N/A (8)	project management
math skills	office etiquette	Respect
Mechanical	People skills	Risk Management
Medical Classes	Sales presentation and speaking skills	Sales skills
more knowledge of insurance	sales/marketing	Skilled labor (2)
N/A (12)	social skills	spanish language skills
need to find associates to clean rooms and wash dishes	Stamina	willingness to put forth a diligent work effort (2)
networking	Technical Service (4)	Work ethic (2)
Not sure I understand this question?	Weapons Handling Classes	
Outside Sales	Web-based marketing	
People Skills	Writing and interpersonal skills (2)	
Project management		
punctuality (2)		
resourcefulness		
Responsibility		
salesmanship		
Selling ability		
Social		
technical writing		
Texas Real Estate License		
To put up the phone and work		
Work ethic (3)		
writing (2)		

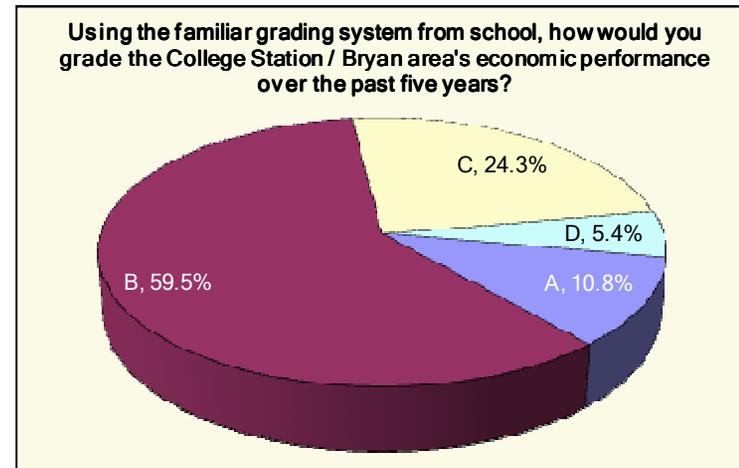
Q17–Grading Economic Performance?

In Question 17, the respondents were asked,

“Using the familiar grading system from school, how would you grade the College Station / Bryan area's economic performance over the past five years?”

- A significant majority graded the area’s economic performance over the past five years as a B, a grade that is often regarded as fair to above average.
- Nearly one quarter of responding firms graded the area’s economic performance as a C, average or slightly below.
- There were no F grades given out by any respondent.

Grading Economic Performance



Q18–Expectations of Growth?

In Question 18, the respondents were asked,

“What are your expectations for growth of your organization in the College Station / Bryan area over the next five years?”

- Very few respondents expect their businesses to shrink in the next five years. In 2 of the categories, a majority expect increases.

Expectations of Growth

Answer Options	Increase	Maintain	Decrease	Don't Know or Doesn't Apply
Employment	51.4%	43.2%	2.7%	2.7%
Capital investments in equipment or systems	41.1%	46.6%	1.4%	11.0%
Office / manufacturing / research space occupied	29.6%	42.3%	1.4%	26.8%
Sales volume	75.0%	20.8%	1.4%	2.8%
Selling and/or inventory space occupied	31.5%	39.7%	1.4%	27.4%

Q19–Attracting Businesses?

In Question 19, the respondents were asked,

“In your opinion, how suitable is the College Station / Bryan area for attracting the following types of business operations? [Check one box for each row]”

- Few respondents believe that the area is unsuitable for any type of business;
- The lowest ranking of suitability was for a corporate headquarters;
- Almost all of the respondents (89.1%) believe that the area is highly suitable for Research & Development operations; and
- Majorities believe that the College Station / Bryan area is suitable or highly suitable for all answer options except for Corporate / US / regional HQ

Attracting Business Operations

Answer Options	Highly suitable	Suitable	Neutral	Unsuitable	Highly unsuitable
Corporate / US / regional HQ	12.3%	30.1%	26.0%	23.3%	8.2%
Warehousing / distribution / logistics	14.9%	33.8%	31.1%	14.9%	5.4%
Research & development	65.8%	23.3%	8.2%	1.4%	1.4%
Manufacturing / assembly	10.8%	39.2%	31.1%	9.5%	9.5%
Professional services	21.6%	48.6%	21.6%	6.8%	1.4%
Sales / customer support / administrative support	24.7%	45.2%	24.7%	5.5%	0.0%

Q20–Transportation Infrastructure?

In Question 20, the respondents were asked,

“What do you think of the College Station / Bryan area's various transportation system components with regard to the needs of businesses?
Please rate the adequacy of each component's facilities and services.

- Two out of three respondents (67.6%) believe that the area’s access to “Commercial Air Travel” is inadequate;
- Similar majorities believe that most of the other transportation systems are adequate or more than adequate:
 - Private / general aviation – 60.9%
 - Regional highways – 67.6%
 - Local streets – 64.4%
 - Sidewalks and bikeways – 64.2%
- Freight Rail managed to have a small majority (54.1%) who felt the systems were adequate with a large group 24.3% not having an opinion.
- Respondents with business locations in the City of College Station were more likely to find sidewalk and bikeway infrastructure more than adequate (42.9%).
- Respondents whose businesses serve customers outside Texas were more likely than others to report that the area’s regional highways are more than adequate (36.4%).

Adequacy of Transportation Facilities

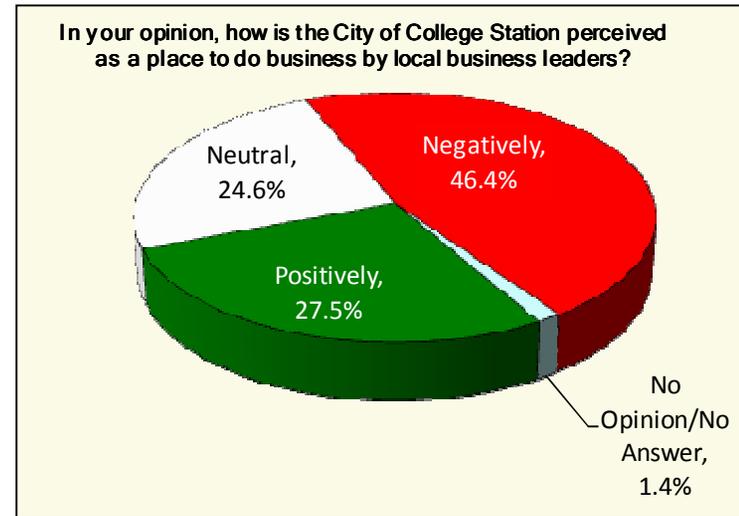
Answer Options	Very inadequate	Inadequate	Adequate	More than adequate	Don't know
Commercial air travel	25.7%	41.9%	25.7%	2.7%	4.1%
Private / general aviation	4.1%	12.2%	51.4%	9.5%	23.0%
Freight rail	13.5%	8.1%	41.9%	12.2%	24.3%
Regional highways	6.8%	24.3%	51.4%	16.2%	1.4%
Local streets	5.4%	18.9%	51.4%	23.0%	1.4%
Sidewalks and bikeways	12.2%	17.6%	29.7%	36.5%	4.1%

Q21—How is City Perceived as a Place for Business?

In Question 21, the respondents were asked,
“In your opinion, how is the City of College Station perceived as a place to do business by local business leaders?”

- Almost one-half (46.4%) of the respondents felt that local business leaders had a negative perception of College Station and
- Only one in four (27.5%) considered the local business perception as positive.
- These answers did not differ substantially based on whether the respondent had a business location within the City of College Station.

Perception of Place to Do Business



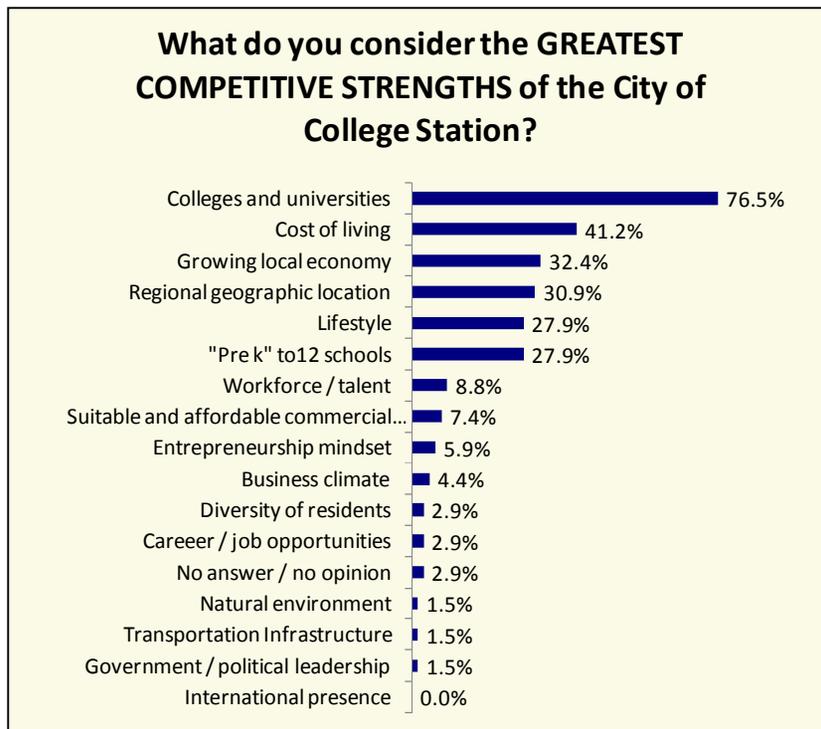
Q22, Q23–What are the Community’s Greatest Strengths and Weaknesses?

In Question 22, the respondents were asked, “What do you consider the GREATEST COMPETITIVE STRENGTHS of the City of College Station? They were asked to check the top three strengths of the city.

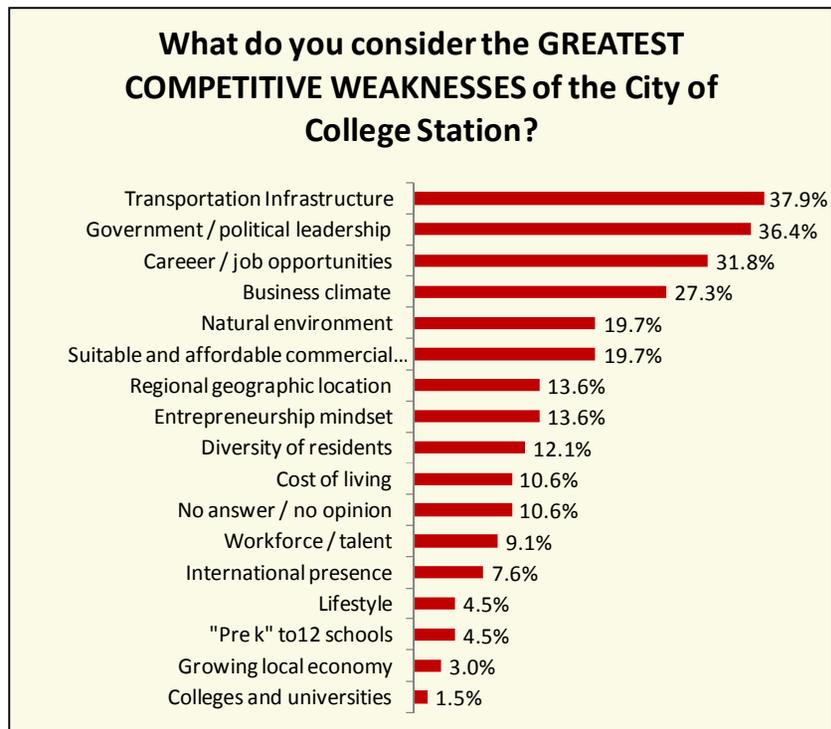
- Respondents with businesses serving customers outside Texas were more likely to cite “Cost of Living” (63.5%) and less likely to cite “Growing local economy” (9.1%).

In Question 23, the respondents were asked, “What do you consider the GREATEST COMPETITIVE WEAKNESSES of the City of College Station?” They were asked to check the top three weaknesses.

College Station’s Greatest Strengths



College Station’s Greatest Weaknesses



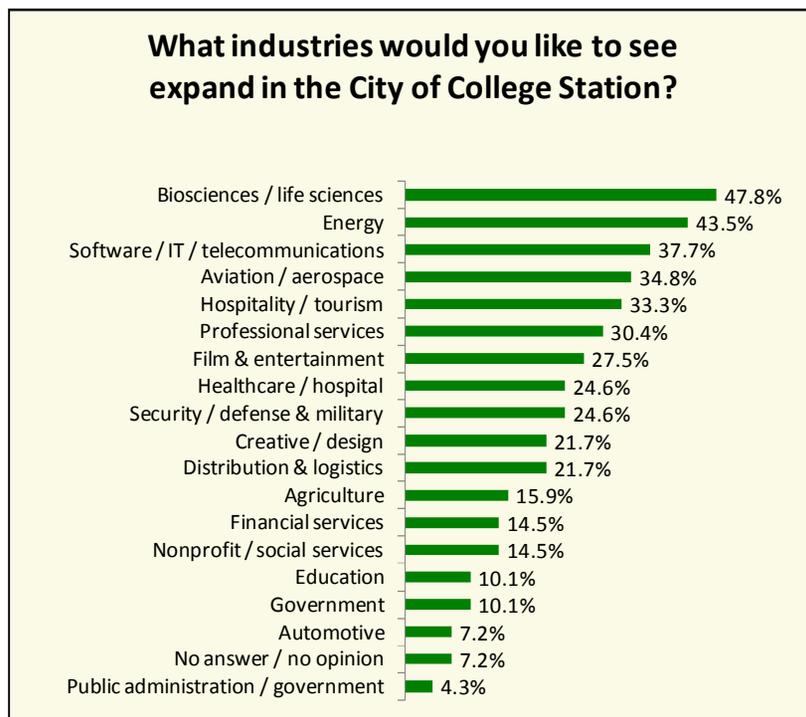
Q24, Q25—Preferred Industry and Retail Sectors for Expansion?

In Question 24, the respondents were asked, “What industries would you like to see expand in the City of College Station?” They could select all industry sectors that they would like to see expand. Respondents with businesses in College Station were less likely to choose Biosciences / life sciences (41.2%) than the overall sample.

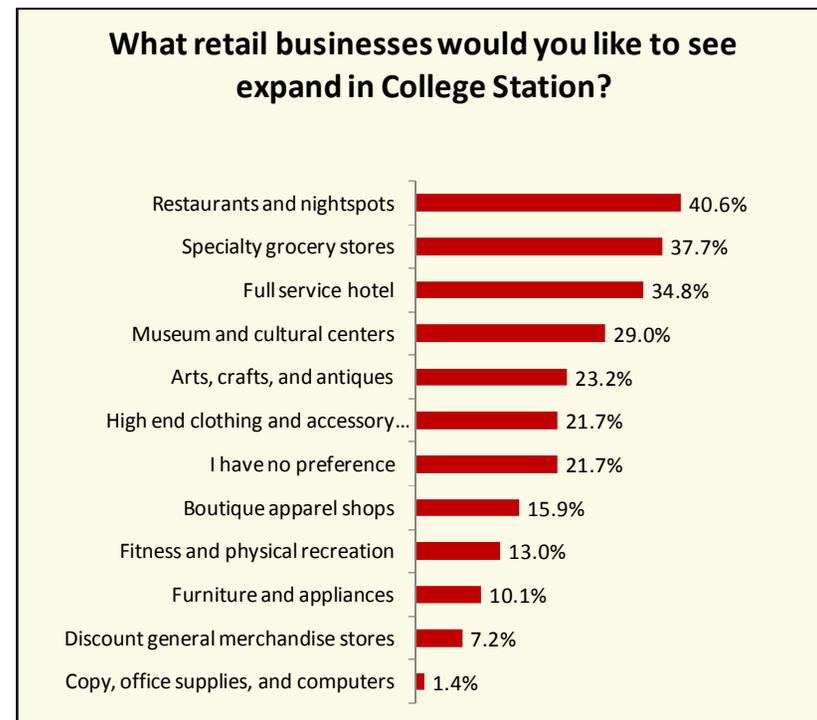
In Question 25, the respondents were asked, “What retail businesses would you like to see expand in the City of College Station?” They could select all any retail business types that they would like to see expand.

- Respondents with businesses serving customers outside Texas cited “Specialty Grocery Stores” (59.1%) more often.

Preferred Industry Sector for Expansion



Preferred Retail Business for Expansion



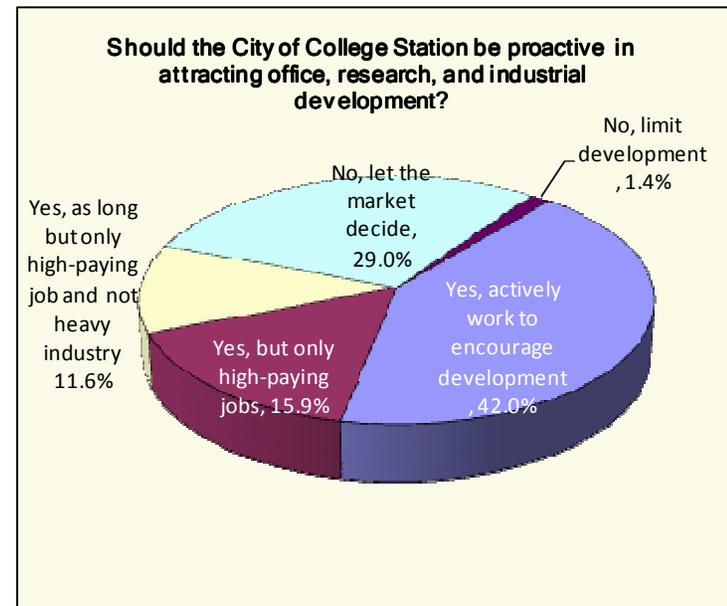
Q26–Should City be Proactive in Attracting Commercial/Industrial Development?

In Question 26, the respondents were asked,

“Should the City of College Station be proactive (via incentives, land use designations, special infrastructure investments, targeted marketing programs, etc.) in attracting office, research, and industrial development?”

- A strong majority (69.5%) of the respondents favor proactive economic development by the City, and this response was even stronger (74.4%) for respondents with business locations within the City;
- Of that positive group, 26.5% prefer that there be restrictions:
 - Only for high paying jobs (26.5%)
 - Excluding heavy manufacturing and warehousing (11.6%);
- 30.4% of the respondents do not favor city incentives with the bulk of those (29.0%) preferring to let the market determine expansion (from Question 26).
- Businesses serving customers outside Texas were both more likely to support incentives for all business types (59.1%) and less likely to prefer to let the market determine expansion (9.1%).
- Only 1.4% of the business respondents want to limit new development.

Proactive Incentives for Commercial/Industrial Development



Full Text of Answer Options	
Yes, the City should actively work to encourage all types of office, research, and industrial development	42.0%
Yes, as long as the uses offer primarily high-paying jobs	15.9%
Yes, as long as the uses offer primarily high-paying jobs AND do not include "heavy" manufacturing or warehousing	11.6%
No, the City should let the market decide	29.0%
No, the City should work to limit office, research, and industrial development	1.4%

Q27–How Should the City be Proactive in Attracting Commercial/Industrial Development?

In Question 27, the respondents who were in favor of the City proactively involved in incentive to attract new commercial and industrial development were asked,

“In what ways should the City be proactive?” They could choose any that they thought the City should use to attract commercial and industrial development.

- The most popular City proactive initiative is “Targeted recruitment and marketing programs” with more than two out of the three respondents selecting this approach;
- Strong support was evidenced for “Financial incentives,” “Special infrastructure investments,” and “Special land use designations and planning areas;
- There is little support for “City developed commercial and real estate sites.”

Preferred Incentives for Commercial/Industrial Development



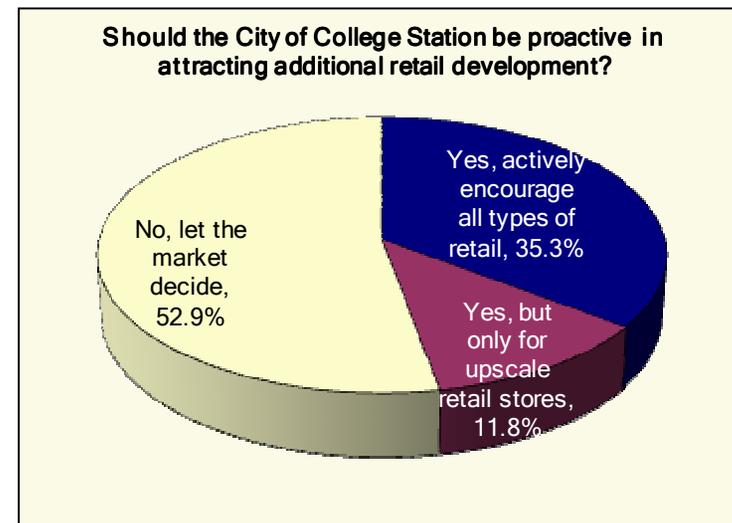
Q28 –Should the City be Proactive in Attracting Retail Development?

In Question 28, the respondents who were in favor of the City proactively involved in incentive to attract new development were asked, “In what ways should the City be proactive?” They could choose any that they thought the City should use.

- A majority of the respondents opposed incentives for retail development preferring to “let the market decide;”
- 47.1% were in favor of incentive for new retail development and 11.8% of those were only in favor on the condition that it would be used only for upscale and “destination” retail;
- None of the respondents expressed the opinion that the City has enough retail and incentive should not be used.

Full Text of Answer Options	
Yes, the City should actively encourage all types of retail development	35.3%
Yes, but only for upscale or “destination” retail stores	11.8%
No, the City should let the market decide	52.9%
No, the City has enough retail space and should work to limit additional development	0.0%

Proactive Incentives for Retail Development



Q29—How Should the City be Proactive in Attracting Retail Development?

In Question 29, the respondents the respondents who were in favor of the City proactively involved in incentive to attract new retail development were asked,

“In what ways should the City be proactive?” They could choose any that they thought the City should use.

- As with the commercial and industrial promotion, the most popular City proactive retail initiative is “Targeted recruitment and marketing programs” with more than two out of the three respondents selecting this approach;
- Strong support was evidenced for “Financial incentives,” “Special infrastructure investments,” and “Special land use designations and planning areas;
- There is little support for “City developed commercial and real estate sites.”

Preferred Incentives for Retail Development



Q30–Are you Planning to Expand in College Station?

In Question 30, the respondents were asked “Are you considering relocating to, expanding, or opening a business location in College Station in the next 5 years?”

- A significant number of the respondents (41.7%) were planning to expand – which is indicative of a strong local economy.

Q31–Why are You not Expanding College Station?

In Question 31, the respondent who answered Question 30 that they were not considering expansion of their business in College Station were asked:

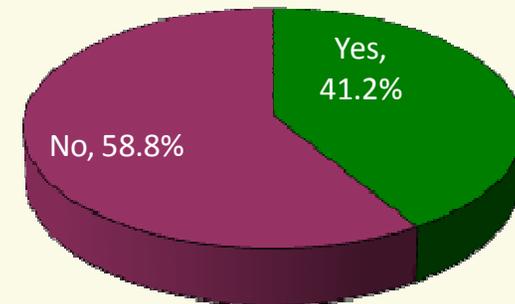
“Why would you not consider expanding or locating in the City of College Station?”

- The most often mentioned reason (47.5%) was that “Expansion or relocation is not necessary or beneficial for the organization;”
- 30% of the respondents felt that “General business or financial conditions don't permit expansion;”
- Fewer than one in four respondents, however, mentioned, “One or more reasons specific to the City of College Station”

Those verbatim responses are included on the following page.

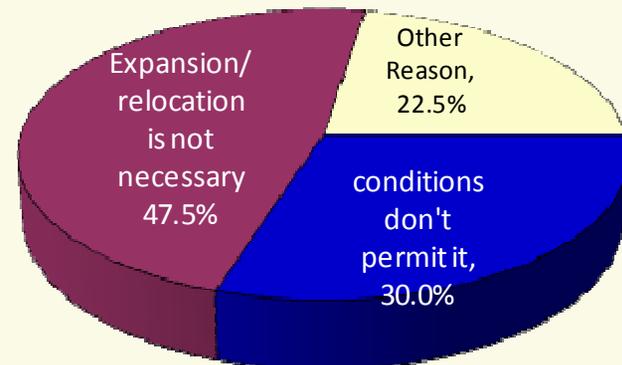
Planning Expansion

Are you considering relocating to, expanding, or opening a business location in College Station in the next 5 years?



Reasons for Location in College Station/Bryan Area

Why would you not consider expanding or locating in the City of College Station?



Q31–Verbatim “Other” Responses

“Why are you not considering expanding or locating in the City of College Station?”

- We already have large office in Bryan
- We already have a location in College Station.
- Building codes and inspections delay development, increase costs, and lack common sense. Rules are too rigid. Many businesses decide not to come here, once they see all the bureaucracy. Building approvals take longer than the actual building time. Inspectors made us tear down a counter because it was 1" too high (for disabled people) but never bothered to check the heating, which was not installed/connected , along with a bathroom sink. Too many rules on bike racks. Nobody in our area of CS rides a bike--traffic is too heavy. Nevertheless, we had to have a bike rack, which has never been used. If I expand my business, it will NOT be in CS. Because of CS, I spent \$10,000 I should not have had to spend, just because of building codes and inspectors who threaten you if you ask "why" they demand something be changed. The landscape requirement is fine, but CS does not require that the landscape be watered. As a result, we are a city of dead shrubery. I tell anyone I meet who is thinking about building here to go somewhere else.
- Onerous regulation of business activity. Permits required for too many things. Signage/building colors/landscape requirements, etc. down to "shrub police" looking for dead/ dying/ misshapen plants.
- The zoning issues relating to B/CS are terrible and while the appearance of our community is important, we don't all have to have the same with color palates and design schemes for the buildings. Individuality is necessary to recruit new business instead of inhibiting their moving into the community. The political environment is adversarial and not given to a "team" mentality.
- I am concerned about our very low ranking in per capita retail spending vs other municipalites in the state. (see TAMU Real Estate Center's Report)
- Too many city regulations
- The growing number of college students, the congestion they generate, and their behavioral problems are beginning to make the city an undesirable place in which to live. For example, gun restrictions should be put into place, as well as additional communications generated to educate these young people about the city laws and consequences of breaking them

Q32–What can College Station do to Become More Competitive?

In Question 32, the respondents were asked “What two efforts could the City of College Station undertake to make the city a more competitive location for your business or organization?”

- The most often mentioned effort was for the City to “Loosen development restrictions and requirements” followed by a similar regulatory change, “Speed up the development and permit process”
- “Improve transportation systems,” “Improve digital / telecommunications infrastructure,” and “Offer incentives to developers and/or businesses” were each mentioned by 20% of the respondents;
- A significant 7.7% of the respondents suggested that, “No specific efforts are needed.”
- These responses did not differ significantly based on whether the respondent had a business operation within the City of College Station or not.
- For businesses that serve customers outside Texas, however, the top choice was “Improve digital / telecommunications infrastructure” (36.4%) while “Loosen development restrictions and requirements” was just 31.8%.

Preferred City Efforts for Business Competitiveness



Q33–What is the Top Reason for a Business to Locate in College Station?

In Question 33, the respondents were asked “What is the top reason that a company should choose to locate in the City of College Station?”

The verbatim open-ended responses are listed below

- A lot of our residents are under employed jobs.
- A top reason to locate in College Station is our schools, we have great schools.
- Abundant highly educated workforce
- Access to Houston and Austin.
- access to talent from A&M graduates
- Access to tamu (resources, highly trained workforce)
- Best place in the country to live. Con-restrictions the City of CS puts on businesses.
- Business environment complements the high quality of living
- Central location in state and TAMU (2 mentions)
- Clean industry. Texas A&M and the TAMU System. Blinn College
- Cost of Living (3 mentions)
- Economic growth (2 mentions)
- Educated workforce, top flight universities, great geographical location, cost of living
- Education of workforce
- Family orientated atmospheres, texas a&m university
- Geographic location sitting between major metros
- Go to some other city
- Good environment, excellent workforce
- Great community, great people, nice town.
- Great place to start a business and raise a family
- Growing economy with a good talent base
- Hard to say; city needs more community feel and less color & architectural restrictions.
- Highly educated workforce
- I don't think they should until we have a whole new city council, mayor and manager
- If government would get out of the way!
- Incentives from the city county to devdelop and build and hire
- It is likely that the business they want to open is not already here (for larger companies only)
- It's a great place to live (except for August)
- Labor
- Lifestyle - small town but offers a lot. Low cost of living. Good education and community.
- Lifestyle and workforce
- Location
- Location to other large metro cities.
- Loosen development restrictions and requirements
- Opportunities
- Potential profitability & business envioronment
- Projected growth for the area/region.
- proximity to Austin, Houston, Dallas
- proximity to houston and austin
- Proximity to Houston and Austin
- Proximity to Houston, San Antonio, Dallas, Austin, and Texas A&M.
- Proximity to Texas A&M

- Proximity to Texas A&M University and its research and development centers
 - Quality of living
 - Quality of life for my employees
 - School systems and it's a family oriented town.
 - Size and location of College Station
 - Strong consumer base
 - TAMU and 60,000 students
 - Texas A&M
- The City allocates resources supporting a good quality of life (incl. schools, parks, safety, etc.)
 - The positive sense of community and high character of its members.
 - The quality of life is the best tool in my box to attract employees.
 - To be a part of the new medical corridor
 - To turn a profit
 - Two highlights: cost-of-living for employees and tax environment for companies in Texas.
 - Very friendly city centrally located in Texas

Q34–What Should be the Economic Development Goals for College Station?

In Question 34, the respondents were asked “What should be the top three economic development goals for the City of College Station? The respondent were offered examples: "Attract more high-tech research businesses," "Improve the range and quality of lodging establishments," "Increase commercial air service." [Write in your answers in the boxes provided - 100 character maximum length]?”

The verbatim responses to this question are below:

1st Mentioned Goal

- Attract "soft" or light industry - - high tech, etc.
- Attract and expand more high-tech businesses, both in bio (already in progress) and not in bio.
- attract business which benefit from a major university nearby
- attract high-tech businesses
- attract more bioscience entities
- attract more business and grow the bio-tech corridor
- attract more businesses- not limited to high tech
- Attract more businesses to relocate
- Attract more high end business's
- Attract more high paying jobs
- Attract more high tech research businesses (5 mentions)
- Attractive industry with high tax base
- Be easier to work with. Developers find it extremely difficult to work with the City of CS.
- Be more diverse in the types of businesses allowed to develop in College Station, it takes all pay levels and business types to make a "City" run.
- Become business friendly
- Better environment for businesses
- Better paying jobs
- Better Transportation
- Business / Industrial park(s)
- Business friendly development for tax paying businesses
- Continue to bring in research
- Diversify economic base of the City
- Encourage small business -- the large chains are taking over and choking out the smaller business operators
- First, do no harm. do not compete with the private sector or provide an advantage to some but not all.
- Fx transportation
- Fully support independently governed bio-corridor & related A&M efforts
- Give local businesses the same considerations you are giving national chains
- High tech infrastructure
- Improve commercial air service (8 mentions)
- Improve regional and local public GROUND transportation (Austin, Houston, Waco, San Antonio & Dallas.
- Improve sense of community.
- Increase family friendly businesses

- Increase the number of entertainment venues geared toward older adults (35-50 age range)
- investigate regional light rail
- Less interference with business and restrictions
- Make doing business w/the City of College Station easier for businesses/developers
- More High Paying Jobs
- Offer incentives for new and small business, such as a tax rebate or credit
- Provide greater service to the populace by doing LESS.
- Quit trying to be like Austen and dalles
- recruit another full service hotel with meeting space
- Stay ahead of infrastructure needs for growth (streets, water, sewer, electric)
- Stimulate commercial taxi service and enforce metered fares
- Stop micromanaging planning and construction
- To gain one more industry that would help support the city
- X number of jobs created

2nd Mentioned Goal

- A major airline carrier, such as Southwest Airlines or JetBlue would be the best thing to happen to CS & surrounding areas.
- Add specialty grocery stores (e.g Market Street or Whole Foods)
- Allow all restaurants and retail businesses the same opportunity
- Allow developers and/or landowners to use their property as they see fit.
- Attract more nice family type restaurants
- Attract additional entertainment facilities such as a large water park
- Attract high tech and "clean" manufacturing
- Attract high tech manufacturing
- Attract more high-tech research businesses
- attract more high-tech research businesses (especially lifesciences & energy)
- Attract more light and heavy manufacturing
- Attract more young professionals to bridge gap from students to established professionals
- Better environment for young adults (former grads)
- Better incentives for development
- Create more opportunities for tourism related businesses - fields, convention center, etc
- Deregulate utilities
- Destination name hotel with full service restraurant, bar
- Develop regional distribution, although the region may be limited
- Eliminate many building requirements, such as "shades" over windows
- Encourage higher-end retail/dining to appeal to the kinds of employees who would work for the above-mentioned businesses.
- Focus on partnership with TAMU
- Get government regulation out of the way

- Get passenger rail service
- improve air service with more options (5 mentions)
- Improve the quality of traveling performing arts shows
- improve transportation flow and mobility
- Increase Commercial Air Service
- Increase number of food chain locations throughout the city
- Increase the number of FULL SERVICE hotels.
- Loosen color and architectural restrictions.
- Loosen development restrictions
- Lower taxes
- Lower taxes for high tech startups
- make it easier from a regulatory perspective to build
- make older areas nicer
- More high paying jobs
- more housing for young professionals
- Promote a business friendly climate
- Quit trying to Apess the university
- Relax development requirements so that it is advantageous for businesses to develop in College Station and not in the County or other Cities.
- Retain tech companies
- Safer streets- fund police and fire
- Solicite basic industry
- Speed permits and approvals for development
- Strive to have city employees make purchases from College Station retailers when possible
- That government is best that governs least.
- Transportation issues
- upgrade air service
- Work cooperatively with the City of Bryan - foster a united community - not divided by city limits
- X new hotels built

3rd mentioned Goal

- Assure top notch health care facilities
- Attract businesses that produce goods and add to the tax base.
- Attract more businesses on a national level
- Attract more highly skilled/trade industries to increase the overall income rate for individuals who are not students
- Attract more international businesses like Gunler
- Attract more retail businesses and get Blinn to put their second campus in College Station
- Attract non retail businesses
- Be easier to do business with
- Better retail to attract business during TAMU games
- Build up, not out.
- Change all city leaders
- Coordinated and integrated approach to attracting high tech businesses
- Create jobs for all economic levels

- Create more friendly environment from law enforcement in northgate
- Decrease regulations on new construction -- signage requirements, etc. Can be restrictive to business.
- Decrease the size of government
- Deregulate college station utilities
- Encourage collaboration
- Favorable tax policies
- Find good ways to promote light industrial development
- Foster development of research coming from t&m into business ventures
- Get more aggressive in attracting high end business's
- Improve city's image of being a developer friendly city and not one that is difficult to develop in or that acts very adversarial towards developers.
- Improve commercial air service and public transportation
- Improve mass transit services
- Incentivise based on potential tax income
- Increase air to atlanta, austn more flights to dfw, iah
- Increase commercial air service (perhaps delta)
- Increase mass transportation options (freeway, high speed rail and/or air)
- Invest in public broadband internet access.
- Keep college graduates here
- More business development in south college station
- More entertainment
- Open for business mentality
- Provide residents more options for dsl service
- Public safety
- Realize that the city planners are having a negative effect
- Recruit companies/industries that will provide opportunities for all levels of pay low to high end.
- Reduce mobile home sites
- Stay out of the way of highest and best use market forces for new development
- Stop annexing area of other communities that the city can't immediately provide services.
- Term limits for all elected officials.
- Town center
- Utility rates are much higher in cs than they are in bryan and surrounding areas.
- X new flights per day

Q35–What is the Most Important Marketing Effort for the City of College Station?

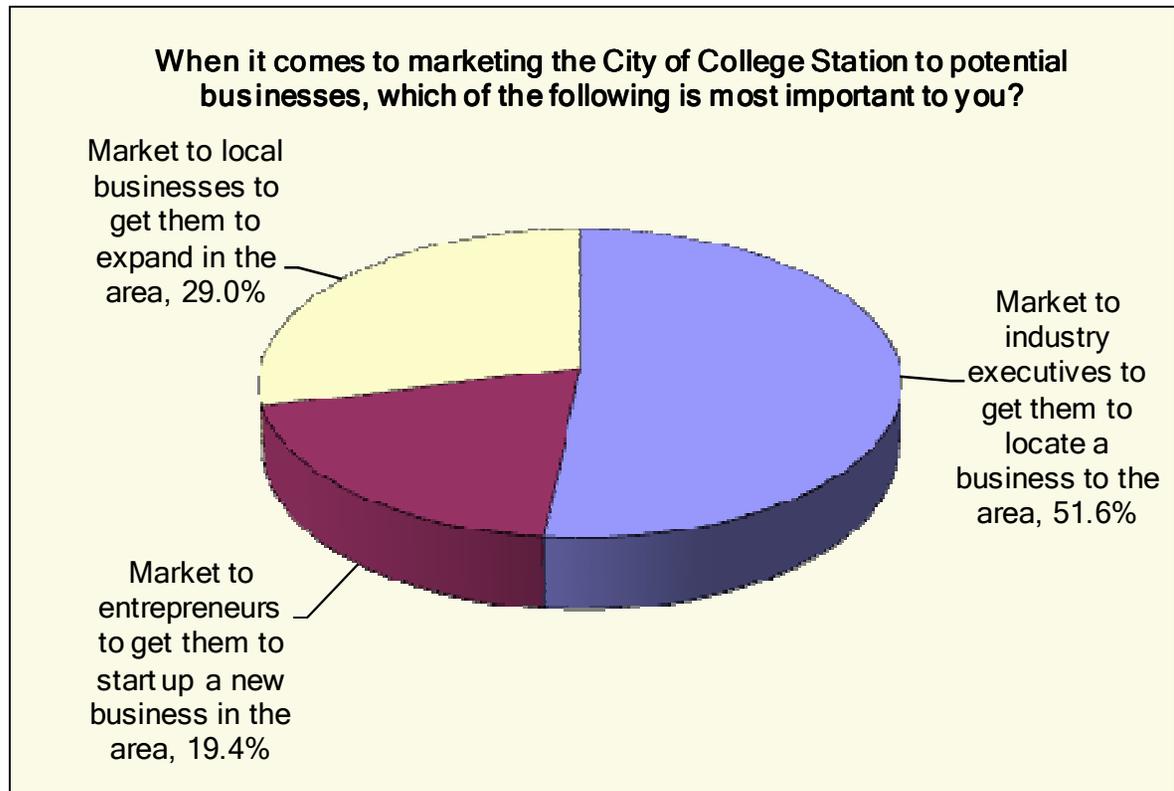
In Question 35, the respondents were asked

“When it comes to marketing the City of College Station to potential businesses, which of the following is most important to you?”

They were asked to select the statement that most closely matches your view of most important.

- A majority of the respondents preferred to “Market to industry executives to get them to locate a business to the area”

Preferred City Marketing Efforts



Q36-What One Word Should be Used for Marketing College Station?

In Question 36, the respondents were asked

“What one word would you use to market the City of College Station to potential businesses?”

Following is a list of the one word marketing pitch. The number in parenthesis is the number of mentions of that word.:

- Braintrust
- Central
- Challenging
- Clean
- Community
- Different
- Diverse
- Dynamic
- Emerging
- Fat
- Friendly (2)
- Fun
- Great
- Growing or Growth (5)
- Ideal
- Inconsistent
- Inexpensive
- Intrusive
- Invest
- Lifestyle
- Livability
- Livable
- Location (3)
- Nice
- Progressive (2)
- Proximity
- Quality
- Regional
- Restrictive
- Synergy
- Texas A&M (5)
- Thriving
- Underemployed
- University

Survey Questionnaire

College Station Area Business Survey

City of College Station Economic Development Master Plan

The City of College Station is preparing its Economic Development Master Plan and wants to hear from you about doing business in the City and the region. Please take the opportunity to complete this survey and share your thoughts with us. The results of the survey will be used to guide the City in their future projects, programs, and policies. We encourage you to forward this survey to other business owners, managers, and decision makers in the community as well - the more responses provided, the more meaningful the information will be to the City. All individual responses will remain confidential.

We look forward to hearing from you on how we can make our community even more prosperous in the years to come and thank you for your time.

*** 1. Do you own or serve in an upper management capacity at a business or institution in the College Station / Bryan area?**

- Yes
- No

*** 2. What is your position in the organization?**

- Business owner / Chairman / CEO
- Chief Executive Officer (CEO), not owner
- Chief Financial Officer (CFO)
- Top manager, e.g. Executive Vice President, Senior Vice President
- Other upper management

College Station Area Business Survey

*** 3. Describe your organization**

- This is our headquarters location and we have offices in other locations
- This is our headquarters location and we do not have offices in other locations
- Our headquarters is located elsewhere

If headquarters is located elsewhere. [Enter location below]

*** 4. Where are your local operations located?**

- Within the City of College Station only
- Locations both within and outside the City of College Station
- In Brazos County outside the City of College Station only
- In another county outside of Brazos County only

*** 5. How long has your organization been located in the College Station / Bryan area?**

- Fewer than 2 years
- 2 - 5 years
- 6 - 10 years
- 11 - 25 years
- More than 25 years
- Don't know/no answer

College Station Area Business Survey

***6. In what industry is your organization? [Please select the one sector that most closely fits your business]**

- Financial activities
 - Educational and health services
 - Information (journalism, media and entertainment, telecommunications)
 - Leisure and hospitality
 - Transportation, warehousing, and utilities
 - Professional and business services
 - Mining, logging, and construction
 - Other (please specify)
- Wholesale trade
 - Retail trade
 - Manufacturing
 - Government
 - Other services
 - Nonprofits and charities (not included above)

***7. What is your approximate annual gross revenue?**

- 0 - \$500K
- \$500K - \$1 million
- \$1 million - \$5 million
- \$5 million - \$20 million
- \$20 million - \$50 million
- More than \$50 million
- Confidential / no answer

***8. How many people are employed by your organization inside the U.S.?**

- Fewer than 25
- 25 to 99
- 100 to 499
- 500 to 999
- 1,000 or more
- No answer / don't know

College Station Area Business Survey

***9. How many people are employed in your organization in the College Station / Bryan area?**

- 25 or Fewer
- 25 to 50
- 51 to 99
- 100 to 199
- 200+
- No answer / don't know

***10. Over how wide a market area does your organization in the College Station / Bryan area serve customers or clients?**

Pick all that apply.

- The neighborhood immediately around the organization location
- Most or all of the College Station / Bryan urban area
- All of Brazos County (urban and rural)
- Brazos County and surrounding counties
- All of Texas
- The U.S. beyond Texas
- U.S. and International

College Station Area Business Survey

11. Please choose the top three reasons that your organization is located in the College Station / Bryan area?

- Premier location for my industry
- Proximity to customers
- Low business costs
- Available tax incentives
- Lifestyle & amenities
- Historical location
- Available workforce
- Proximity to research
- Proximity to vendors / suppliers

Other (please specify)

*** 12. How many employees did you hire in in the last 12 months in the College Station / Bryan area?**

- None
- 1 to 9
- 10 to 25
- 26 to 50
- 51 to 99
- 100 to 199
- 200+
- No answer / don't know

*** 13. From where do you obtain the bulk of your executive and upper management staff?**

	Enrolled college students living in College Station and Bryan	Newly graduated college students in College Station and Bryan	Permanent residents of College Station and Bryan	Residents of rural areas and other towns near College Station and Bryan	Other areas of Texas	Rest of U.S. outside of Texas	Outside the U.S.
Executive and Upper Management Staff	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Middle Management and General Staff	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

*** 14. From your experience, is it difficult to either: (a) attract desired employees to the College Station / Bryan area, or (b) retain existing employees in the College Station / Bryan area? In other words, do you find the existing or potential employees are more likely to prefer living and working in other metropolitan areas?**

- No, I have not found any difficulty in attracting desirable employees to the College Station / Bryan area and/or retaining desirable employees here.
- Yes, I have found it difficult to attracting desirable employees to the College Station / Bryan area and/or retaining desirable employees here.

College Station Area Business Survey

15. What are the reasons you think it is difficult to attract and/or retain employees in College Station / Bryan? Choose up to three.

- My company or organization does not offer pay levels competitive with similar jobs in other metropolitan areas.
- Employees want more local career advancement opportunities for themselves than what College Station / Bryan offers.
- The spouses of employees want more local career advancement opportunities for themselves than what College Station / Bryan offers.
- Employees and their families prefer the shopping, services, and amenities of a larger metropolitan area.
- College Station / Bryan does not offer the right kinds of housing types or neighborhood environments.
- The College Station / Bryan area is too oriented toward college students.
- The College Station / Bryan area does not offer enough social and recreational activities for young adults.
- College Station / Bryan does not offer adequate commercial air service to other places.

Other (please specify - limit 100 characters)

*** 16. To better serve your business, what skills should be improved through education and training of your employees?
[Please list up to three "top needed" skills improvements]**

Top needed skill	<input type="text"/>
Next needed skill	<input type="text"/>
Other needed skill	<input type="text"/>

College Station Area Business Survey

*** 17. Using the familiar grading system from school, how would you grade the College Station / Bryan area's economic performance over the past five years?**

A
 B
 C
 D
 F

*** 18. What are your expectations for growth of your organization in the College Station / Bryan area over the next five years?**

	Increase	Maintain	Decrease	Don't Know or Doesn't Apply
Capital investments in equipment or systems	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Office / manufacturing / research space occupied	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Employment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sales volume	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Selling and/or inventory space occupied	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

*** 19. In your opinion, how suitable is the College Station / Bryan area for attracting the following types of business operations? [Check one box for each row]**

	Highly suitable	Suitable	Neutral	Unsuitable	Highly unsuitable
Corporate / US / regional HQ	<input type="radio"/>				
Warehousing / distribution / logistics	<input type="radio"/>				
Research & development	<input type="radio"/>				
Manufacturing / assembly	<input type="radio"/>				
Professional services	<input type="radio"/>				
Sales / customer support / administrative support	<input type="radio"/>				

College Station Area Business Survey

*** 20. What do you think of the College Station / Bryan area's various transportation system components with regard to the needs of businesses? Please rate the adequacy of each component's facilities and services.**

	Very inadequate	Inadequate	Adequate	More than adequate	Don't know
Commercial air travel	<input type="radio"/>				
Private / general aviation	<input type="radio"/>				
Freight rail	<input type="radio"/>				
Regional highways	<input type="radio"/>				
Local streets	<input type="radio"/>				
Sidewalks and bikeways	<input type="radio"/>				

We would now like to focus on matters specific to the City of College Station as opposed to the overall metropolitan area.

*** 21. In your opinion, how is the City of College Station perceived as a place to do business by local business leaders?**

- Positively
- Neutral
- Negatively
- No Opinion/No Answer

College Station Area Business Survey

22. What do you consider the GREATEST COMPETITIVE STRENGTHS of the City of College Station? [Please check the top three strengths of the city]

- | | |
|--|---|
| <input type="checkbox"/> Regional geographic location | <input type="checkbox"/> Entrepreneurship mindset |
| <input type="checkbox"/> Cost of living | <input type="checkbox"/> "Pre k" to12 schools |
| <input type="checkbox"/> Natural environment | <input type="checkbox"/> Government / political leadership |
| <input type="checkbox"/> Lifestyle | <input type="checkbox"/> Career / job opportunities |
| <input type="checkbox"/> Business climate | <input type="checkbox"/> International presence |
| <input type="checkbox"/> Transportation Infrastructure | <input type="checkbox"/> Growing local economy |
| <input type="checkbox"/> Colleges and universities | <input type="checkbox"/> Suitable and affordable commercial real estate |
| <input type="checkbox"/> Diversity of residents | <input type="checkbox"/> No answer / no opinion |
| <input type="checkbox"/> Workforce / talent | |

Other (please specify)

College Station Area Business Survey

23. What do you consider the GREATEST COMPETITIVE WEAKNESSES of the City of College Station? [Please check the top three weaknesses of the city]

- | | |
|--|---|
| <input type="checkbox"/> Regional geographic location | <input type="checkbox"/> Entrepreneurship mindset |
| <input type="checkbox"/> Cost of living | <input type="checkbox"/> "Pre k" to12 schools |
| <input type="checkbox"/> Natural environment | <input type="checkbox"/> Government / political leadership |
| <input type="checkbox"/> Lifestyle | <input type="checkbox"/> Career / job opportunities |
| <input type="checkbox"/> Business climate | <input type="checkbox"/> International presence |
| <input type="checkbox"/> Transportation Infrastructure | <input type="checkbox"/> Growing local economy |
| <input type="checkbox"/> Colleges and universities | <input type="checkbox"/> Suitable and affordable commercial real estate |
| <input type="checkbox"/> Diversity of residents | <input type="checkbox"/> No answer / no opinion |
| <input type="checkbox"/> Workforce / talent | |

Other (please specify)

College Station Area Business Survey

***24. What industries would you like to see expand in the City of College Station? [Check the box next to each industry that you would like to see expand]**

- | | |
|--|---|
| <input type="checkbox"/> Agriculture | <input type="checkbox"/> Government |
| <input type="checkbox"/> Automotive | <input type="checkbox"/> Healthcare / hospital |
| <input type="checkbox"/> Aviation / aerospace | <input type="checkbox"/> Hospitality / tourism |
| <input type="checkbox"/> Biosciences / life sciences | <input type="checkbox"/> Nonprofit / social services |
| <input type="checkbox"/> Creative / design | <input type="checkbox"/> Professional services |
| <input type="checkbox"/> Distribution & logistics | <input type="checkbox"/> Public administration / government |
| <input type="checkbox"/> Education | <input type="checkbox"/> Security / defense & military |
| <input type="checkbox"/> Energy | <input type="checkbox"/> Software / IT / telecommunications |
| <input type="checkbox"/> Film & entertainment | <input type="checkbox"/> No answer / no opinion |
| <input type="checkbox"/> Financial services | |

Other (please specify)

***25. What retail businesses would you like to see expand in the City of College Station? [check box next to each type of business that should be expanded]**

- | | |
|--|--|
| <input type="checkbox"/> Arts, crafts, and antiques | <input type="checkbox"/> Copy, office supplies, and computers |
| <input type="checkbox"/> Specialty grocery stores | <input type="checkbox"/> Fitness and physical recreation |
| <input type="checkbox"/> Museum and cultural centers | <input type="checkbox"/> High end clothing and accessory department stores |
| <input type="checkbox"/> Restaurants and nightspots | <input type="checkbox"/> Boutique apparel shops |
| <input type="checkbox"/> Furniture and appliances | <input type="checkbox"/> Full service hotel |
| <input type="checkbox"/> Discount general merchandise stores | <input type="checkbox"/> I have no preference |

Other (please specify - 30 characters max)

College Station Area Business Survey

***26. Should the City of College Station be proactive (via incentives, land use designations, special infrastructure investments, targeted marketing programs, etc.) in attracting office, research, and industrial development?**

- Yes, the City should actively work to encourage all types of office, research, and industrial development
- Yes, as long as the uses offer primarily high-paying jobs
- Yes, as long as the uses offer primarily high-paying jobs AND do not include "heavy" manufacturing or warehousing
- No, the City should let the market decide
- No, the City should work to limit office, research, and industrial development

***27. In what ways should the City be proactive? Please choose all you think the City should use.**

- Financial incentives
- Special infrastructure investments
- Special land use designations and planning areas
- City-developed commercial real estate sites
- Targeted recruitment and marketing programs

Other (please specify)

***28. Should the City of College Station be proactive (via incentives, land use designations, special infrastructure investments, targeted marketing programs, etc.) in attracting additional retail development?**

- Yes, the City should actively encourage all types of retail development
- Yes, but only for upscale or "destination" retail stores
- No, the City should let the market decide
- No, the City has enough retail space and should work to limit additional development

College Station Area Business Survey

***29. In what ways should the City be proactive? Choose all that you think the City should use.**

- Financial incentives
- Special infrastructure investments
- Special land use designations and planning areas
- City-developed commercial real estate sites
- Targeted recruitment and marketing programs

Other (please specify)

***30. Are you considering relocating to, expanding, or opening a business location in College Station in the next 5 years?**

- Yes
- No

***31. Why would you not consider expanding or locating in the City of College Station?**

- General business or financial conditions don't permit it
- Expansion or relocation is not necessary or beneficial for the organization
- One or more reasons specific to the City of College Station - please explain

College Station Area Business Survey

32. What two efforts could the City of College Station undertake to make the city a more competitive location for your business or organization?

- Improve transportation systems
- Improve underground utilities and drainage
- Improve digital / telecommunications infrastructure
- Loosen development restrictions and requirements
- Speed up the development and permit process
- Offer incentives to developers and/or businesses
- Redevelop older areas
- Improve public safety and emergency services
- Add more parks, trails, and other amenities
- Develop a new mixed-use town center
- Develop a convention or conference center
- No specific efforts are needed

Other (please specify - limit to 100 characters)

***33. What is the top reason that a company should choose to locate in the City of College Station? [Please write your choice in the box below, limit is 100 characters]**

College Station Area Business Survey

*** 34. What should be the top three economic development goals for the City of College Station? Examples: "Attract more high-tech research businesses," "Improve the range and quality of lodging establishments," "Increase commercial air service." [Write in your answers in the boxes provided - 100 character maximum length]**

Top Goal	<input type="text"/>
2nd Goal	<input type="text"/>
3rd Goal	<input type="text"/>

*** 35. When it comes to marketing the City of College Station to potential businesses, which of the following is most important to you? [Select the statement that most closely matches your view of most important]**

- Market to industry executives to get them to locate a business to the area
- Market to local businesses to get them to expand in the area
- Market to entrepreneurs to get them to start up a new business in the area

*** 36. What one word would you use to market the City of College Station to potential businesses? [Write one marketing word in the box below - limit 20 characters]**

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