



2017 Bellevue Survey of Businesses

Final Report

SUBMITTED:

August 2017

SUBMITTED TO:

City of Bellevue, WA

Northwest Research Group, LLC

[Blank page inserted for pagination purposes.]

TABLE OF CONTENTS

CONTENTS

Table of Contents	3
• Contents	3
• List of Figures	5
Executive Summary	7
• Background and Methodology.....	7
• Key Metrics.....	7
• Bellevue as a Place to Operate a Business.....	8
• Business Health	9
• Employees and Staffing.....	9
• Broadband Internet.....	9
• Additional Topics.....	9
Project Overview	11
• Background and Objectives.....	11
• Questionnaire.....	11
• Methodology.....	12
• Sample Size and Margin of Error.....	13
Key Findings—Operating a Business in Bellevue	15
• Bellevue as a Place to operate a business.....	15
• Quality of Services Provided to Businesses.....	19
• Bellevue Headed in Right vs. Wrong Direction	23
• Reasons for Moving in The Right Direction.....	26
• Reasons for Moving in the Wrong Direction.....	27
• Value for Tax Dollar	29
• Comparison to Residential Survey	33
• Most Important Business-Related Issue Facing Bellevue	35
• Likelihood to Recommend Starting a Business in Bellevue	37
• Bellevue’s Economy Compared to Rest of Puget Sound.....	41



Factors with the Biggest Impact on Businesses	43
• Overall Impact Factors	43
Key Findings—Community Characteristics	51
• Overall Community Characteristics.....	51
• Business Attributes	52
• Physical Attributes	53
• Transportation and Housing Attributes	54
Key Findings—Business Health	55
• Current Economic Strength of Business.....	55
• Anticipated Economic Strength of Business	57
• Anticipated Changes to Capital Expenditures.....	59
• Geographic Customer Markets	61
• Location of Suppliers.....	62
Key Findings –Employees and Staffing.....	63
• Location of Employee Talent Pool	63
• Anticipated Changes to Employees.....	64
• Ability to find Trained / Qualified staff	67
Key Findings—Broadband Internet.....	69
• Technology Services Subscribed To	69
• Quality of Internet Service	70
Key Findings—Additional Topics	71
• Customer Service Related to Taxes.....	71
• Incentives for Alternative Transportation.....	73
Appendix I – Demographic Profile of Businesses	75
Appendix II—Response Mode by Sector.....	77
Appendix III—Business Geographies.....	78
Appendix IV—Age and Size of Business	80
Appendix V—Verbatim Text.....	82
Appendix VI—Questionnaire	146

LIST OF FIGURES

Figure 1: Community Characteristics for Operating a Business in Bellevue	8
Figure 2: City of Bellevue as a Place to Operate a Business – Year-Over-Year	15
Figure 3: City of Bellevue as a Place to Operate a Business – By Sector – 2017 Only	16
Figure 4: City of Bellevue as a Place to Operate a Business – By MEC – 2017 Only	17
Figure 5: Quality of Services Provided to Businesses – Year-Over-Year	19
Figure 6: Quality of Services Provided to Businesses – By Sector – 2017 Only	20
Figure 7: Quality of Services Provided to Businesses – By MEC – 2017 Only	21
Figure 8: Direction City is Headed – Year-Over-Year	23
Figure 9: Direction City is Headed – By Sector – 2017 Only.....	24
Figure 10: Direction City is Headed – By MEC – 2017 Only.....	25
Figure 11: Reasons Bellevue is Moving in the Right Direction (n=569)	26
Figure 12: Reasons Bellevue is Moving in the Wrong Direction (n=122).....	27
Figure 13: Value Received for Money – Year-Over-Year.....	29
Figure 14: Value Received for Money – By Sector – 2017 Only.....	30
Figure 15: Value Received for Money – By MEC – 2017 Only.....	31
Figure 16: Comparison of Bellevue Businesses to Bellevue Residents	33
Figure 17: Biggest Problems Facing Bellevue – Year-Over-Year	35
Figure 18: Likelihood of Recommending Starting a Business in Bellevue – Year-Over-Year	37
Figure 19: Likelihood of Recommending Starting a Business in Bellevue – By Sector – 2017 Only	38
Figure 20: Likelihood of Recommending Starting a Business in Bellevue – By MEC – 2017 Only	39
Figure 21: Current Bellevue Economy Compared to Puget Sound Communities – 2017 Only.....	41
Figure 22: Factors with the Biggest Impact – 2017 Only	43
Figure 23: Factors with the Biggest Negative Impact – Year over Year	44
Figure 24: Factors with the Biggest Impact – Business Services – 2017 Only.....	45
Figure 25: Factors with the Biggest Impact – Information Technology – 2017 Only.....	46
Figure 26: Factors with the Biggest Impact – Retail – 2017 Only	47
Figure 27: Factors with the Biggest Impact – Tourism – 2017 Only	48
Figure 28: Factors with the Biggest Impact – “Other” Sector – 2017 Only.....	49
Figure 29: Community Characteristics for Operating a Business in Bellevue – Year over Year	51
Figure 30: Business Attributes for Operating a Business in Bellevue by Sector – 2017 Only	52
Figure 31: Safety Attributes for Operating a Business in Bellevue – 2017 Only	53
Figure 32: Transportation and Housing Attributes for Operating a Business in Bellevue – 2017 Only	54
Figure 33: Economic Strength of Business – Year over Year.....	55
Figure 34: Economic Strength of Business –By Sector – 2017 Only.....	56
Figure 35: Anticipated Economic Strength of Business – Year over Year	57



Figure 36: Anticipated Economic Strength of Business – By Sector – 2017 Only	58
Figure 37: Anticipated Changes to Capital Expenditures – Year over Year.....	59
Figure 38: Anticipated Changes to Capital Expenditures – By Sector – 2017 Only.....	60
Figure 39: Location Selling Goods and Services – By Sector – 2017 Only.....	61
Figure 40: Location of Suppliers – By Sector – 2017 Only.....	62
Figure 41: Location of Employee Talent Pool– By Sector – 2017 Only	63
Figure 42: Anticipated Changes to Number of Employees – Year over Year	64
Figure 43: Anticipated Changes to Number of Employees– By Sector – 2017 Only.....	65
Figure 44: Anticipated Types of Employees to be Hired – Year over Year.....	66
Figure 45: Percent of Businesses that have Difficulty Finding Trained and Qualified Staffing – By Sector – 2017 Only.....	67
Figure 46: Technology Services Currently Subscribed To – Year over Year	69
Figure 47: Internet Access by Business Sector – 2017 Only.....	69
Figure 48: Adequacy of Current Internet Service – Year over Year	70
Figure 49: Anticipated Adequacy of Future Internet Service – Year over Year	70
Figure 50: Satisfaction Related to Customer Service Dealing with Bellevue Taxes – Year over Year.....	71
Figure 51: Satisfaction Related to Customer Service Dealing with Bellevue Taxes – By Sector – 2017 Only.....	72
Figure 52: Incentives for Alternative Transportation – Year over Year	73
Figure 53: Likelihood of Offering Incentives for Alternative Transportation – By Sector – 2017 Only.....	74

EXECUTIVE SUMMARY

BACKGROUND AND METHODOLOGY

The 2017 Bellevue Business survey represents the second comprehensive survey of businesses located within Bellevue conducted by the City of Bellevue; the first was in 2015. The survey is designed to support Bellevue’s Business Retention & Expansion Program, better understand the needs of local businesses and enable the City to deliver quality services to the business community. Survey results will be used, in part, to guide City policy and programmatic decisions for economic development, infrastructure, and services to support long-term economic growth. The survey addresses Bellevue’s key metrics, attitudes about operating and owning a business in Bellevue, starting a business in Bellevue, questions relating to taxation, and general questions about safety, transportation and other areas affecting businesses. To conduct this survey, the city provided a list of businesses physically located within the city limits of Bellevue. An attempt was made to contact each business on the list, either via email, postal mail or phone calls. The 2017 business survey was conducted between May 4 and June 16, 2017 and resulted in a total of 994 interviews—198 completed over the telephone and 796 completed via the Web.

KEY METRICS

Bellevue receives high ratings for all its key metrics. These key metrics provide an overall picture of the health of the city from the perspective of businesses located in Bellevue:

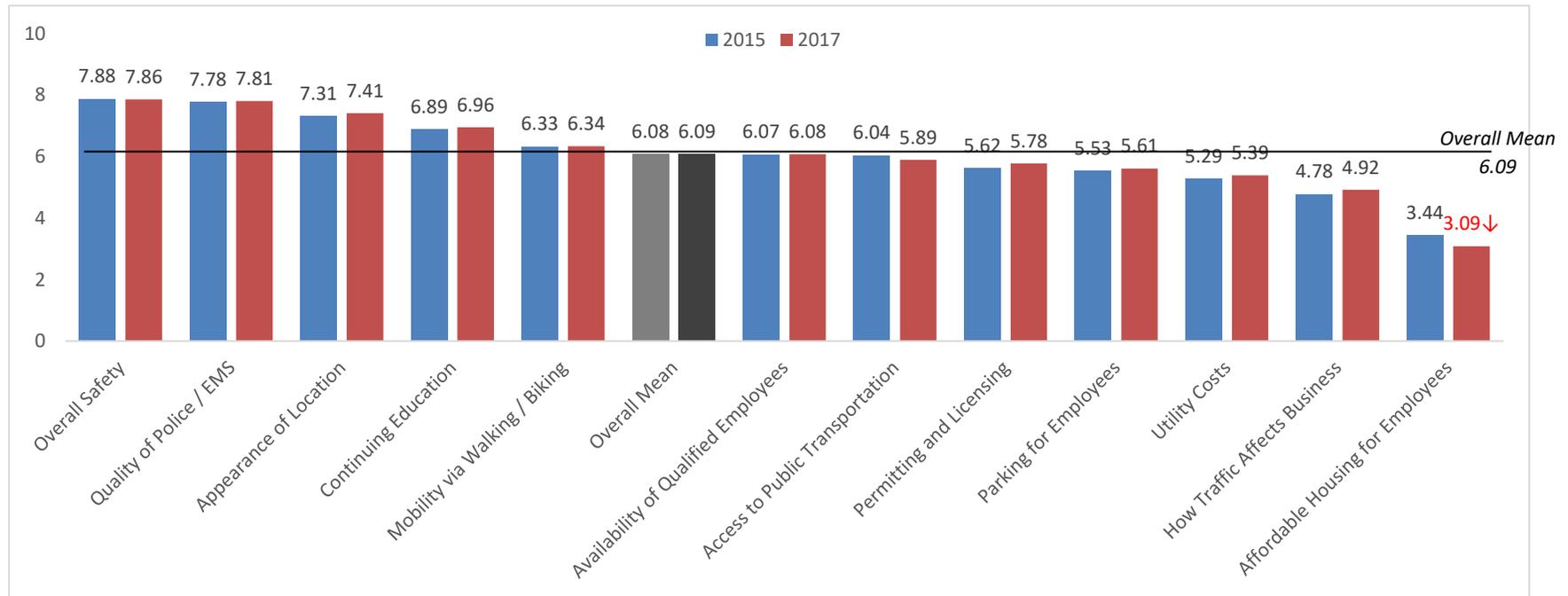
- More than 7 out of 10 businesses feel that Bellevue is a “somewhat” or “significantly” better place to operate a business when compared to other cities. This is unchanged compared to 2015.
- Just as in 2015, two-thirds of businesses in Bellevue feel that the quality of services provided to businesses by the City “exceeds” or “greatly exceeds” their expectations.
- Sixty-nine percent (69%) of businesses feel that the city is moving in the right direction—the same as in 2015.
 - There is some variance based on business sector with Information Technology businesses providing the highest ratings and Retail businesses providing the lowest ratings.
- Six in ten (59%) feel that they are receiving “good” or “excellent value for their tax dollars paid. While the wording of this question changed from 2015, the results are the same.
 - Older businesses feel they are getting better value for their tax dollars than younger/newer businesses.
- Issues relating to traffic, taxes, housing and commercial space affordability, and parking are the most commonly mentioned business-related issues facing Bellevue over the next several years.
 - Traffic is mentioned more often among businesses located in Downtown than in other areas.
- Six in ten (60%) businesses state they are likely to recommend starting a business in Bellevue.
- Nearly all (90%) of businesses feel that the strength of Bellevue’s economy is better than that of other cities in the Puget Sound Region—also similar to 2015.

BELLEVUE AS A PLACE TO OPERATE A BUSINESS

Businesses were shown 12 key attributes that pertain to running a business in Bellevue and asked to compare Bellevue to other cities and towns for each attribute. Businesses used an 11-point scale where “0” indicated Bellevue was “significantly worse than other cities and towns” and “10” indicated Bellevue was “significantly better than other cities and towns. Bellevue’s overall ranking of 6.09 is the same as in 2015 and indicates that Bellevue is similar to other cities and towns when all things are considered. However, there are a few key areas where Bellevue does significantly better than or worse than other cities and towns.

Bellevue continues to perform better than other cities and towns in areas focused around safety and appearance. Bellevue is underperforming in areas regarding traffic and affordability. Affordable housing for employees is the only attribute to change when compared to 2015. Ratings for this attribute decreased significantly.

Figure 1: Community Characteristics for Operating a Business in Bellevue



CC1— From what you have experienced, seen, or heard, compared with other cities and towns, how would you rate Bellevue on each of the following items?

Base: All respondents (2015=917; 2017=994)

Mean is based on an 11-point scale from 0 to 10

BUSINESS HEALTH

Three of the five measures below were asked in 2015 and 2017. There are no changes in the results when comparing the two survey periods.

- Eight in ten businesses (79%) state that the economic strength of their business is “somewhat” or “very” strong.
- Sixty-one percent (61%) of businesses indicated they expect the economic strength of their business to improve over the next three to five years.
- Half (51%) of businesses do not anticipate much change in their capital expenditures over the next few years. However, more businesses anticipate an increase in capital expenditures (43%) rather than a decrease (6%).

Two-thirds (63%) of businesses say they sell goods and services in Bellevue. Seven in ten (71%) sell elsewhere in the Puget Sound or in Washington State. One-third (32%) sell nationally, and 17 percent sell internationally.

Overall, 31 percent of businesses say the majority of their suppliers are in Bellevue. Half (49%) say their suppliers are located elsewhere in the Puget Sound or in Washington State. One-third (35%) indicate the majority of their suppliers are located nationally, and 10 percent are supplied internationally.

EMPLOYEES AND STAFFING

Overall, the clear majority of the employee talent pool is located either in Bellevue or elsewhere in the Puget Sound and this has increased from 82 percent in 2015 to 88 percent currently.

Six in ten businesses (59%) do not anticipate much change in the number of employees over the next few years. However, more businesses anticipate an increase (33%) rather than a decrease (8%). This is the same as 2015.

However, just as seen in 2015, 41 percent of businesses state that they have had difficulty finding trained and/or qualified staff over the past 12 months. Half of retail businesses and two-thirds of tourist-related businesses have difficulty retaining or finding talent.

BROADBAND INTERNET

Over 90 percent of all businesses report having broadband internet access.

Eighty percent (80%) of businesses with broadband state that the service meets their current needs—up significantly from 74 percent in 2015—and 81 percent feel their current level of service will meet their needs over the next few years—up significantly from 58 percent in 2015.

ADDITIONAL TOPICS

Seven in ten businesses are satisfied with the customer service received when dealing with their Bellevue Business Taxes.

Only 21 percent of businesses offer an incentive to employees for alternative transportation. However, large businesses versus small, businesses located within the downtown versus outside downtown, and businesses in the IT sector versus other sectors are all more likely to offer their employees incentives to use alternative transportation.

[Blank page inserted for pagination purposes.]

PROJECT OVERVIEW

BACKGROUND AND OBJECTIVES

The 2017 Bellevue Business Survey is the second survey conducted of businesses by the City of Bellevue; the first was conducted in 2015. The survey is designed to support Bellevue’s Business Retention & Expansion Program, better understand the needs of local businesses and enable the City to deliver quality services to the business community. The survey results will be used, in part, to guide City policy and programmatic decisions for economic development, infrastructure, and services to support long-term economic growth.

QUESTIONNAIRE

As this was the second time the survey was conducted, careful consideration was taken to maintain consistency with questions asked previously to enable trend analysis. In a few cases, additional questions were added to dig deeper, while others were removed. Key measures from the Bellevue Performance Measures Survey were kept or modified slightly for inclusion in the Business survey. The average survey time for the 2017 Business Survey was 10 minutes by phone and 9 minutes on the web down from an average of 13 minutes by phone and 20 minutes on the web in 2015. The survey included questions regarding:

- Bellevue as a place to run a business
- Quality and value of services provided to businesses
- Physical attributes of the city impacting running a business
- Bellevue’s economic climate
- Adequacy of broadband services
- Location of employee and customer base

METHODOLOGY

The City of Bellevue provided a list of 13,491 businesses located within the City limits and categorized each business into one of five business sectors: Business Services, Information Technology, Retail, Tourism, and Other. Where possible, contact information such as email, and phone number were appended to the sample file. The study was conducted over three phases where businesses were contacted either via email, postal mail, or telephone.

The first phase consisted of email invitations sent to all businesses with a unique email address.

The second phase involved sending invitations via postal mail to businesses that did not have an email address, nor contact phone number. Each of these businesses received one invitation letter and one reminder directing them to go online and take the survey or call a toll-free number to complete the survey via telephone.

The third phase consisted of outbound telephone dialing. Businesses not contacted via email or postal mail as well as non-responders in key sectors were called to ensure adequate representation of businesses in each of the five business sectors.

Regardless of data-collection mode, respondents were screened to ensure that they were part of a business with a physical location in Bellevue. All responses have been kept confidential. No answers or opinions are tied back to individual businesses, and responses are aggregated for reporting.

This report provides analysis and comparisons of the results for the following groups:

- *Business Sector*: Business Services, Information Technology, Retail, Tourism, Other Businesses
- *Major Employment Center (from sample)*: SR 520/Bel-Red, Crossroads, Downtown, Eastgate/Factoria, 116th/Bellefield, and Outside the MEC
- *Age of Business (self-reported)*: Founded prior to 1980, founded in the 1980's, founded in the 1990's, founded in the 2000's, founded in 2010 or later
- *Size of Business (self-reported)*: One to five employees, six to 49 employees, 50 employees or more

The following page provides Sample Sizes and Margin of Error based on business sector. More information regarding sample size and Margin of Error for Major Employment Center and Self-Reported Geographic Area is available in Appendix II. Information regarding the age and size of business is in Appendix III.

SAMPLE SIZE AND MARGIN OF ERROR

A total of 994 interviews were completed: 796 online and 198 via telephone. The distribution of responses by mode and business sector is provided in the table below. The table also provides the distribution of business sectors in the sample universe for comparison purposes.

The margin of error is a statistic expressing the amount of random sampling error in a survey's results. The larger the margin of error, the less faith one should have that the survey's reported results are close to the true figures. The aggregate margin of error in Bellevue's Business Survey is generally no greater than plus or minus 3.0 percentage points at a 95 percent confidence level. Table 1 provides the margin of error for each individual business sector at the 95 percent confidence level.

More information regarding the distribution of surveys and confidence levels by geography can be found in Appendix II.

More information regarding the distribution of surveys and confidence levels by size and age can be found in Appendix III.

Table 1: Distribution of Completed Surveys – by Sector

	Completed Surveys				In Sample Universe		% of Businesses Interviewed	Margin of Error at 95% confidence
	Phone	Web	Total		Total			
Business Services	61	233	294	30%	3,559	26%	8%	5.5%
Information Technology	7	78	85	9%	1,071	8%	8%	10.2%
Retail	30	85	115	12%	1,553	12%	7%	8.8%
Tourism	7	41	48	5%	872	6%	6%	13.8%
Other	93	359	452	45%	6,436	48%	7%	4.4%
Total	198	796	994	100%	11,443	100%	7%	3.0%

[Blank page inserted for pagination purposes.]

KEY FINDINGS—OPERATING A BUSINESS IN BELLEVUE

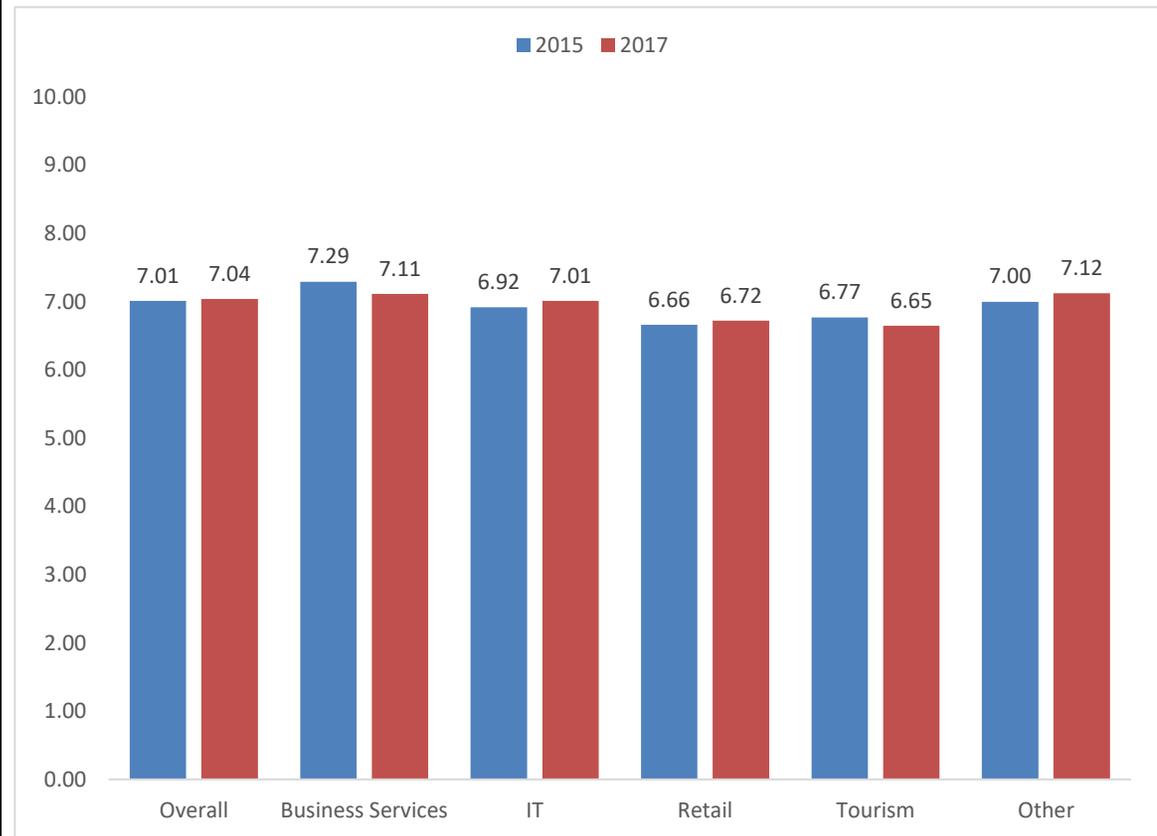
BELLEVUE AS A PLACE TO OPERATE A BUSINESS

All Business / Year-Over-Year

Three-quarters of businesses feel that Bellevue is a “somewhat” or “significantly” better place to operate a business compared to other cities—the same as 2015.

While there are some minor year-over-year variations within sectors, all variations are within the margin of error.

Figure 2: City of Bellevue as a Place to Operate a Business – Year-Over-Year



BNWRG2—From what you have experienced, seen, or heard, compared with other cities and towns, how would you rate Bellevue as a place to operate a business?

Base: All respondents (2015=917; 2017=994)

Mean is based on an 11-point scale from 0 to 10

By Sector

Findings are consistent between sectors and all differences are within the margin of error.

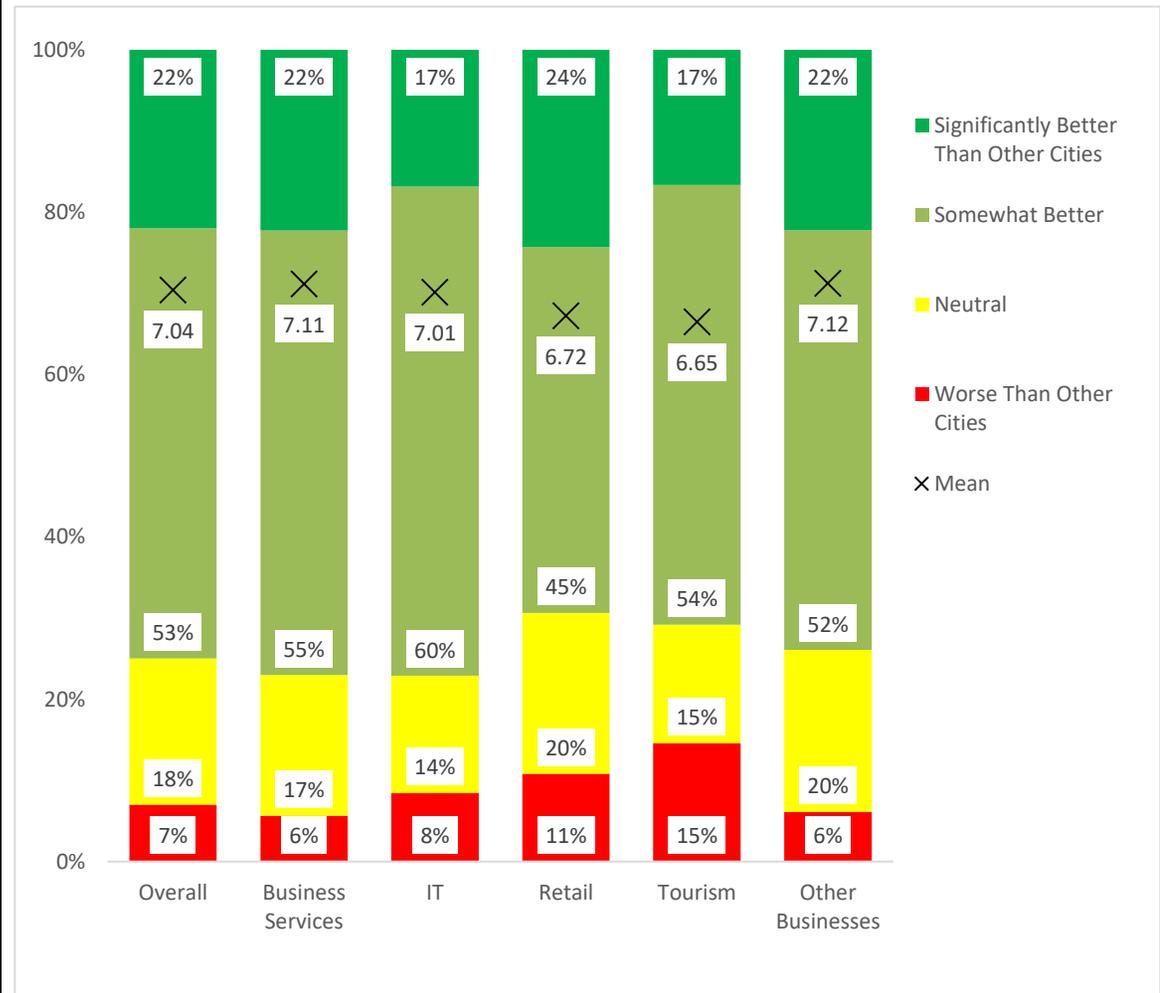
By Size

Smaller businesses, those with 5 or fewer employees are significantly less likely than businesses with more than 5 employees to say that Bellevue is better than other cities as a place to operate a business—72% vs 79% respectively.

By Age

There are no differences based on the age of the business.

Figure 3: City of Bellevue as a Place to Operate a Business – By Sector – 2017 Only



BNWRG2—From what you have experienced, seen, or heard, compared with other cities and towns, how would you rate Bellevue as a place to operate a business?

Base: All respondents (n=994); Business Services (n=294); IT (n=85); Retail (n=115); Tourism (n=48), Other (n=452)

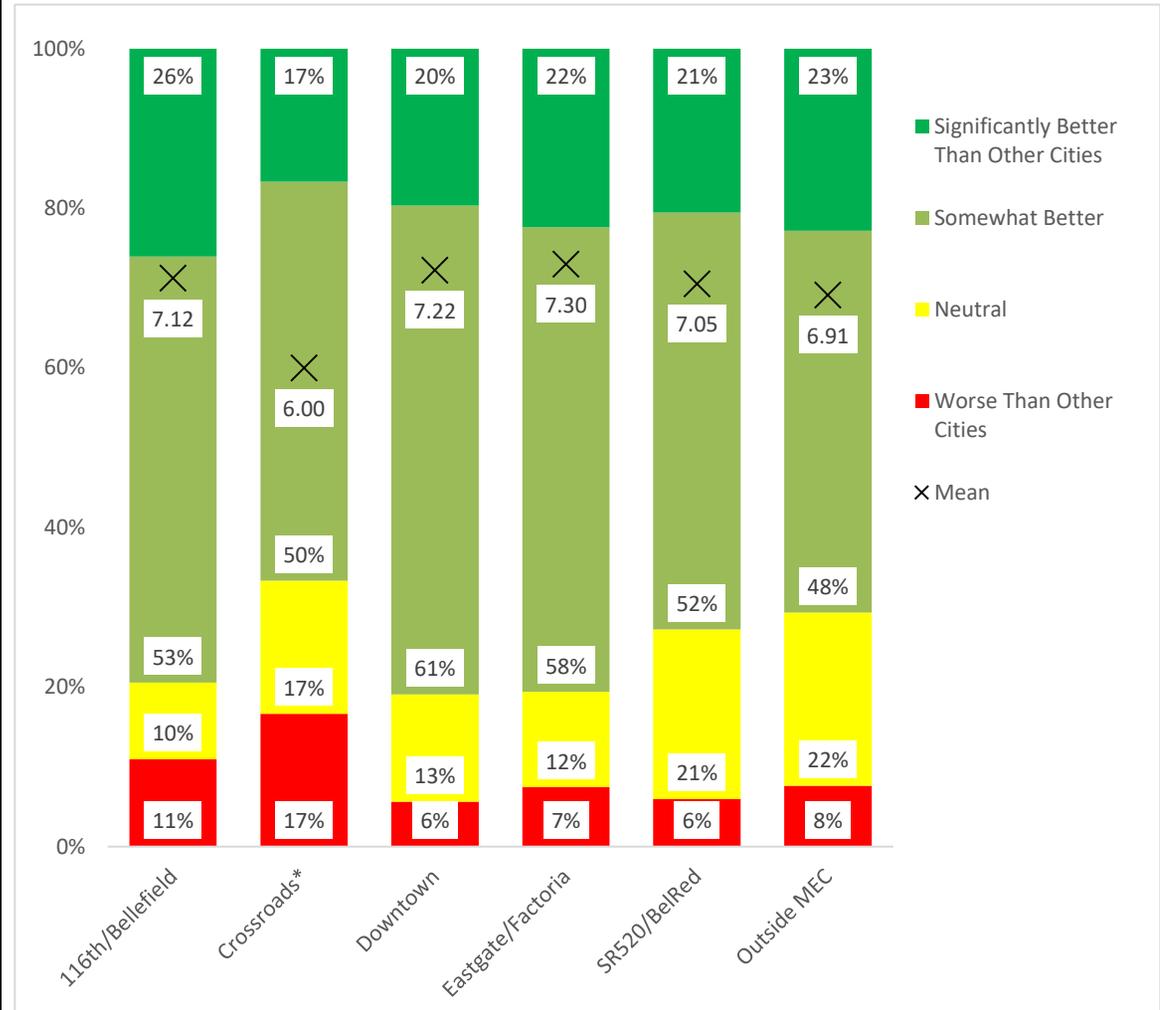
Mean is based on an 11-point scale from 0 to 10

By Location

There are no differences based on the location of the business.

Trended year over year, there is a decrease in ratings for Bellevue as a place to operate a business among businesses located in Crossroads but it should be noted that sample sizes are very small for this MEC (*n=14 in 2015 and n=13 in 2017*).

Figure 4: City of Bellevue as a Place to Operate a Business – By MEC – 2017 Only



BNWRG2—From what you have experienced, seen, or heard, compared with other cities and towns, how would you rate Bellevue as a place to operate a business?

Base: All respondents. 116th/Bellefield (n=75); Crossroads (n=13); Downtown (n=181); Eastgate/Factoria (n=96); SR 520/Bel-Red (n=278); Outside MEC (n=378) *Low base size

Mean is based on an 11-point scale from 0 to 10

[Blank page inserted for pagination purposes.]

QUALITY OF SERVICES PROVIDED TO BUSINESSES

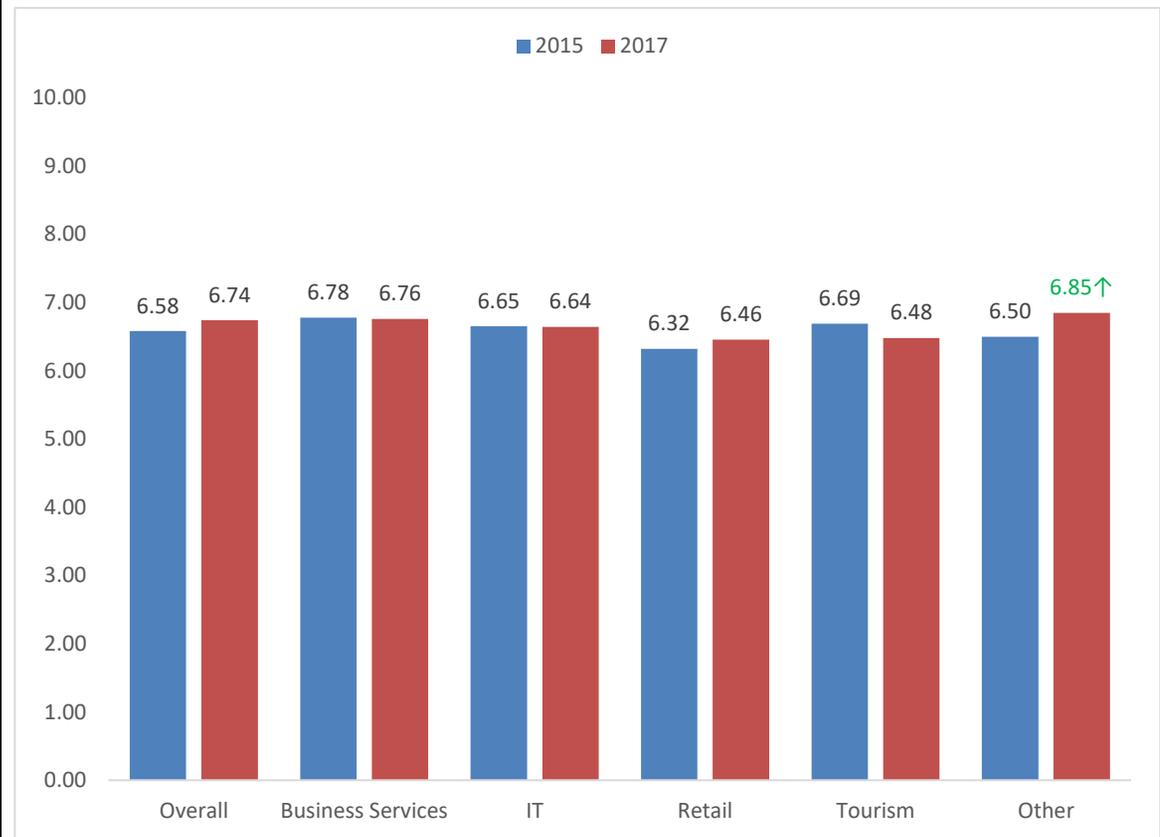
All Business / Year-Over-Year

Overall, the majority (69%) of businesses in Bellevue feel that the quality of services provided to businesses by the City “exceeds” or “greatly exceeds” their expectations.

Ratings for services remains consistent when compared to 2015. This is true overall and for most sectors.

There is a significant increase in ratings for the quality of services among businesses in the “Other” sector.

Figure 5: Quality of Services Provided to Businesses – Year-Over-Year



BNWRG3— How would you rate the overall quality of services provided to businesses by the City of Bellevue?

Base: All respondents (2015=917; 2017=994)

Mean is based on an 11-point scale from 0 to 10

By Sector

There are no differences in ratings for quality of services between business sectors.

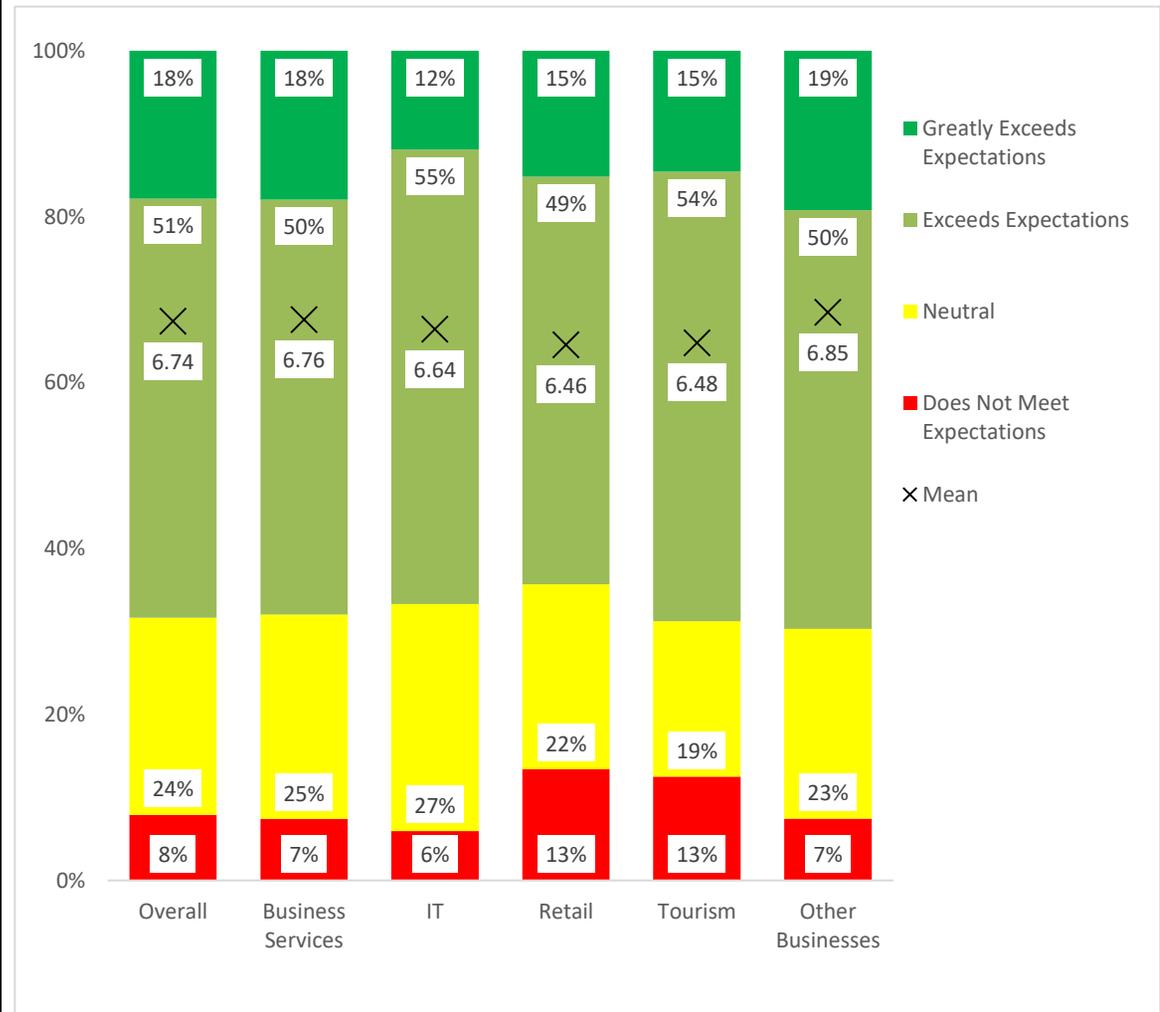
By Size

There are no differences based upon the size of the business.

By Age

There are no differences based upon the age of the business.

Figure 6: Quality of Services Provided to Businesses – By Sector – 2017 Only



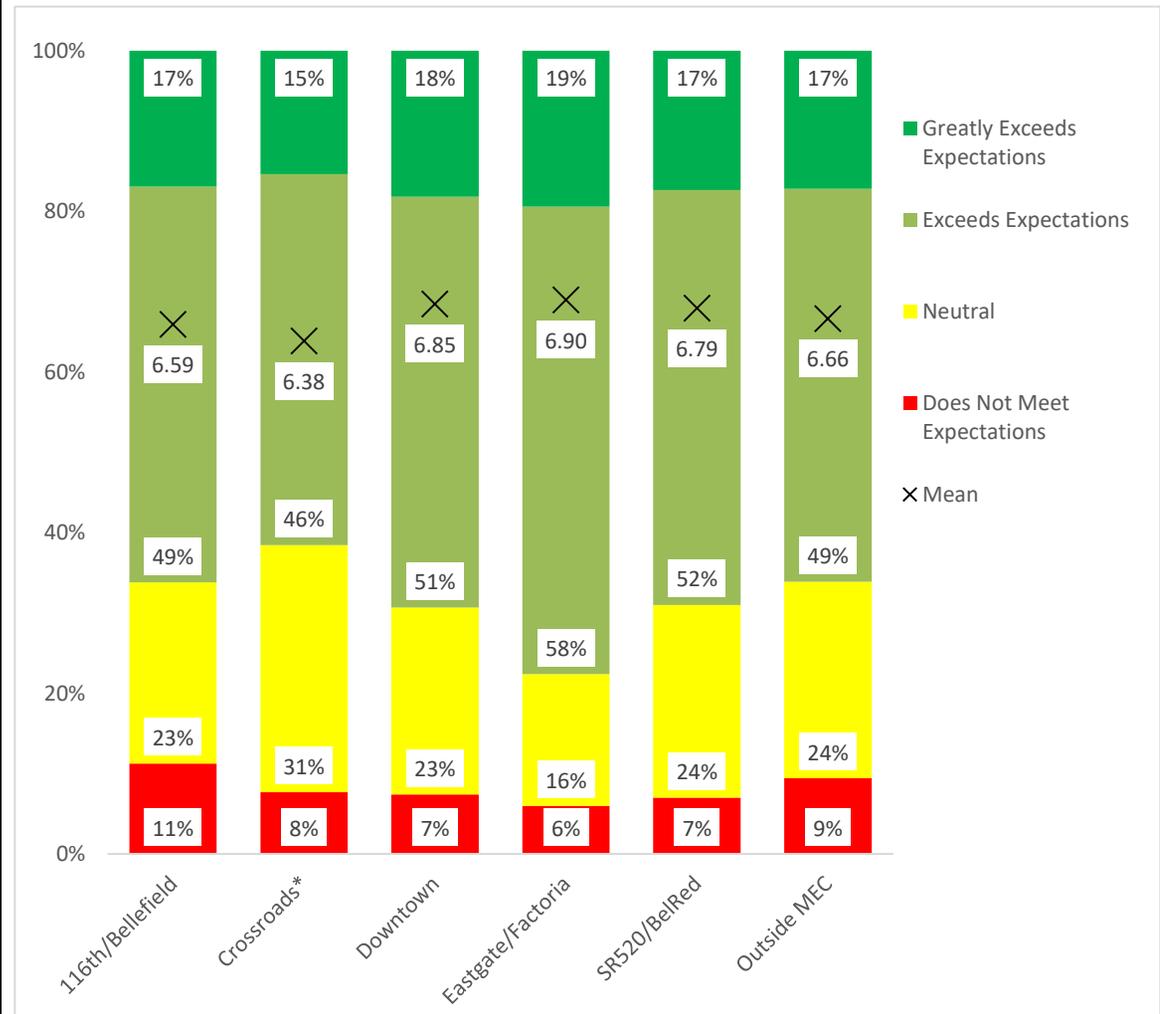
BNWRG3— How would you rate the overall quality of services provided to businesses by the City of Bellevue?
 Base: All respondents (n=994); Business Services (n=294); IT (n=85); Retail (n=115); Tourism (n=48), Other (n=452)
 *Low base size
 Mean is based on an 11-point scale from 0 to 10

By Location

Ratings for quality of services are consistent across all major employment centers and have remained consistent across most MECs when trended from 2015.

However, there is an increase in the rating for overall quality of services found in business located in the SR 520 / BelRed MEC from 6.37 in 2015 to 6.79 in 2017.

Figure 7: Quality of Services Provided to Businesses – By MEC – 2017 Only



BNWRG3— How would you rate the overall quality of services provided to businesses by the City of Bellevue?
 Base: All respondents. 116th/Bellefield (n=75); Crossroads (n=13); Downtown (n=181); Eastgate/Factoria (n=96); SR 520/Bel-Red (n=278); Outside MEC (n=378) *Low base size
 Mean is based on an 11-point scale from 0 to 10

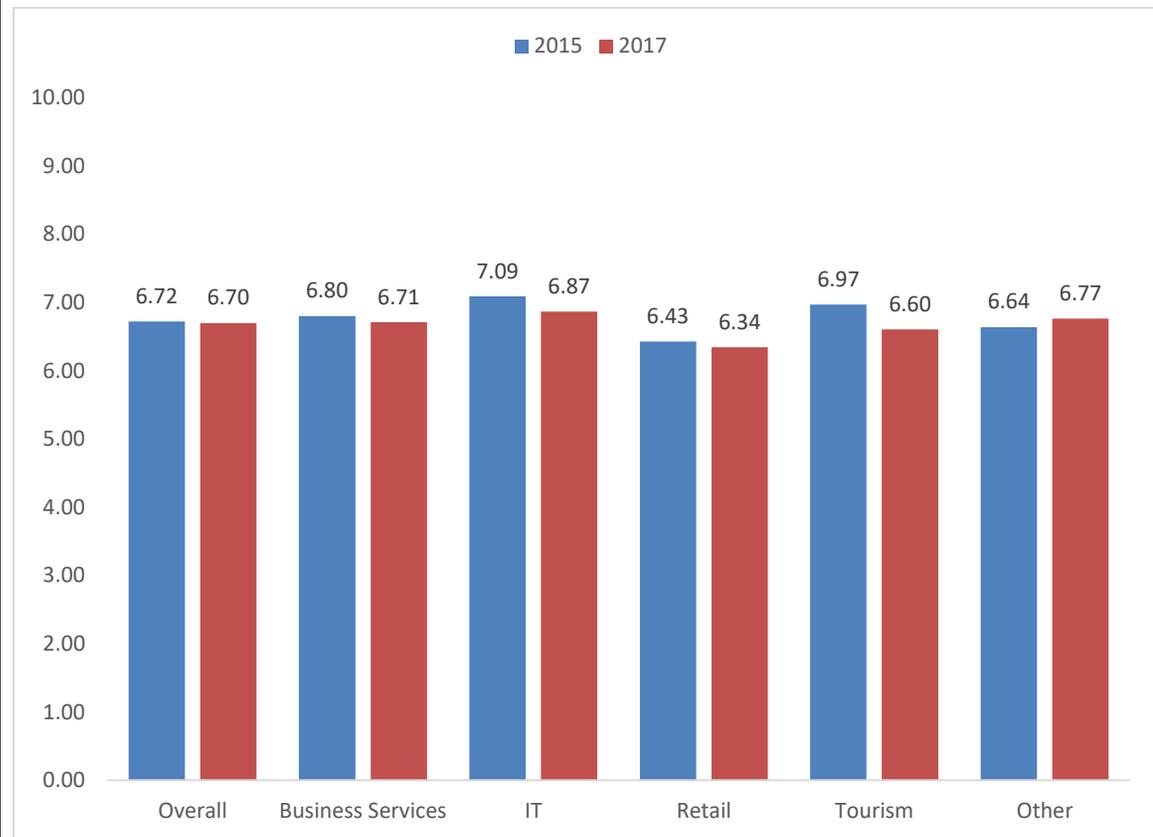
[Blank page inserted for pagination purposes.]

BELLEVUE HEADED IN RIGHT VS. WRONG DIRECTION

All Business / Year-Over-Year

Overall, the majority of businesses in Bellevue (69%) feel that the City is headed in the right direction. This is the same as in 2015 and there are no significant differences between 2015 and 2017 overall or at the sector level.

Figure 8: Direction City is Headed – Year-Over-Year



*BNWRG4— Overall, would you say that Bellevue is headed in the right or wrong direction?
 Base: All respondents (2015=917; 2017=994)
 Mean is based on an 11-point scale from 0 to 10*

By Sector

There is some variance in average score based on business sector with Information Technology businesses providing the highest ratings (6.87) and Retail businesses providing the lowest ratings (6.34). While the difference between these two sectors' average scores is statistically significant, 68 percent of both sectors said the City was headed in the right direction

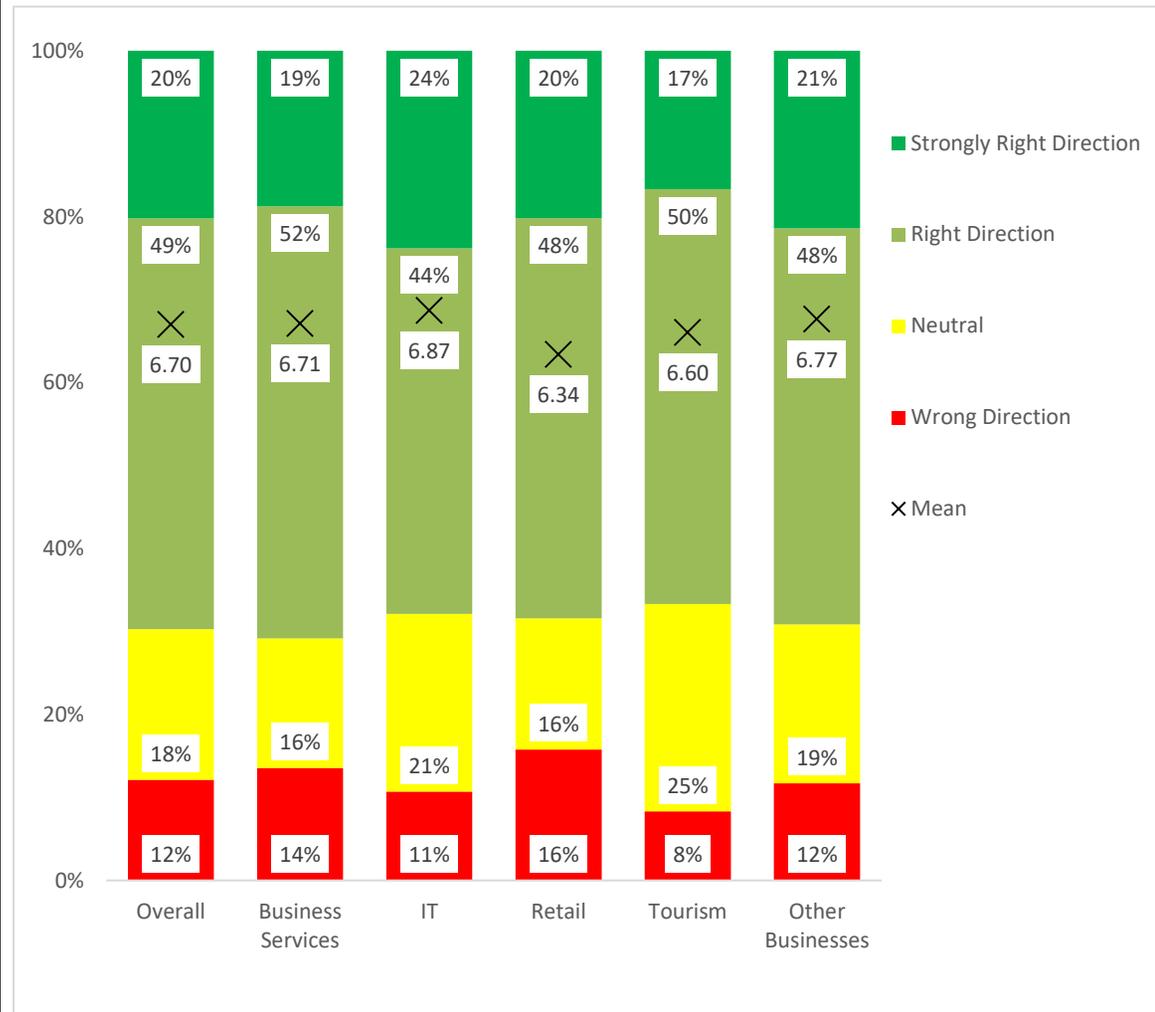
By Size

While there are no significant differences based upon the size of the business there is a general trend of a more positive opinion as businesses get larger.

By Age

There are no differences based upon the age of the business.

Figure 9: Direction City is Headed – By Sector – 2017 Only



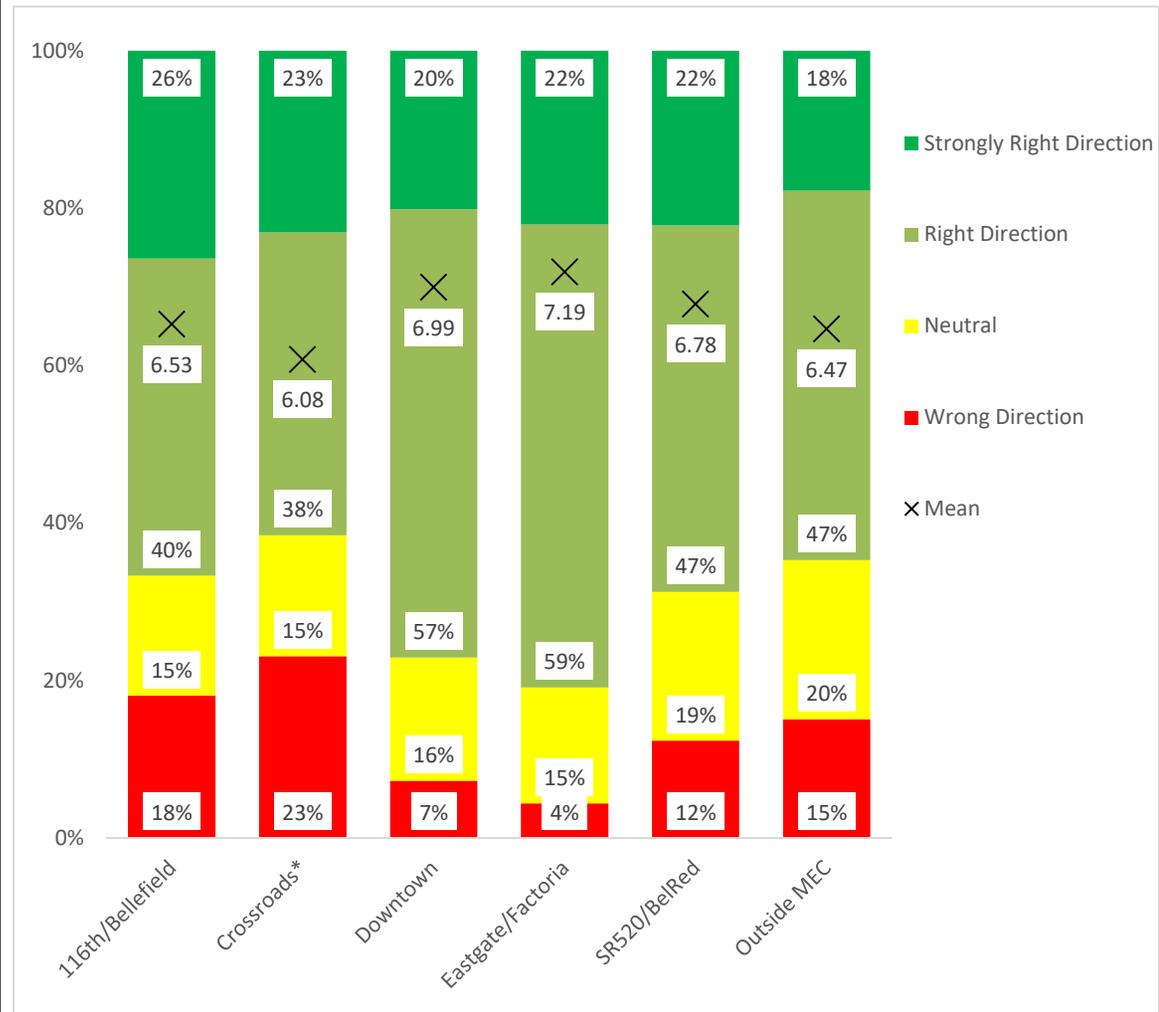
BNWRG4— Overall, would you say that Bellevue is headed in the right or wrong direction?
 Base: All respondents (n=994); Business Services (n=294); IT (n=85); Retail (n=115); Tourism (n=48), Other (n=452)
 Mean is based on an 11-point scale from 0 to 10

By Location

Ratings for the direction the city is headed are consistent across each of the major employment centers.

Ratings have remained consistent from 2015 for all MEC's except for SR 520 / BelRed which has seen a significant increase from 6.33 in 2015 to 6.78 in 2017.

Figure 10: Direction City is Headed – By MEC – 2017 Only



BNWRG4— Overall, would you say that Bellevue is headed in the right or wrong direction?

Base: All respondents. 116th/Bellefield (n=75); Crossroads (n=13); Downtown (n=181); Eastgate/Factoria (n=96); SR 520/Bel-Red (n=278); Outside MEC (n=378) *Low base size

Mean is based on an 11-point scale from 0 to 10

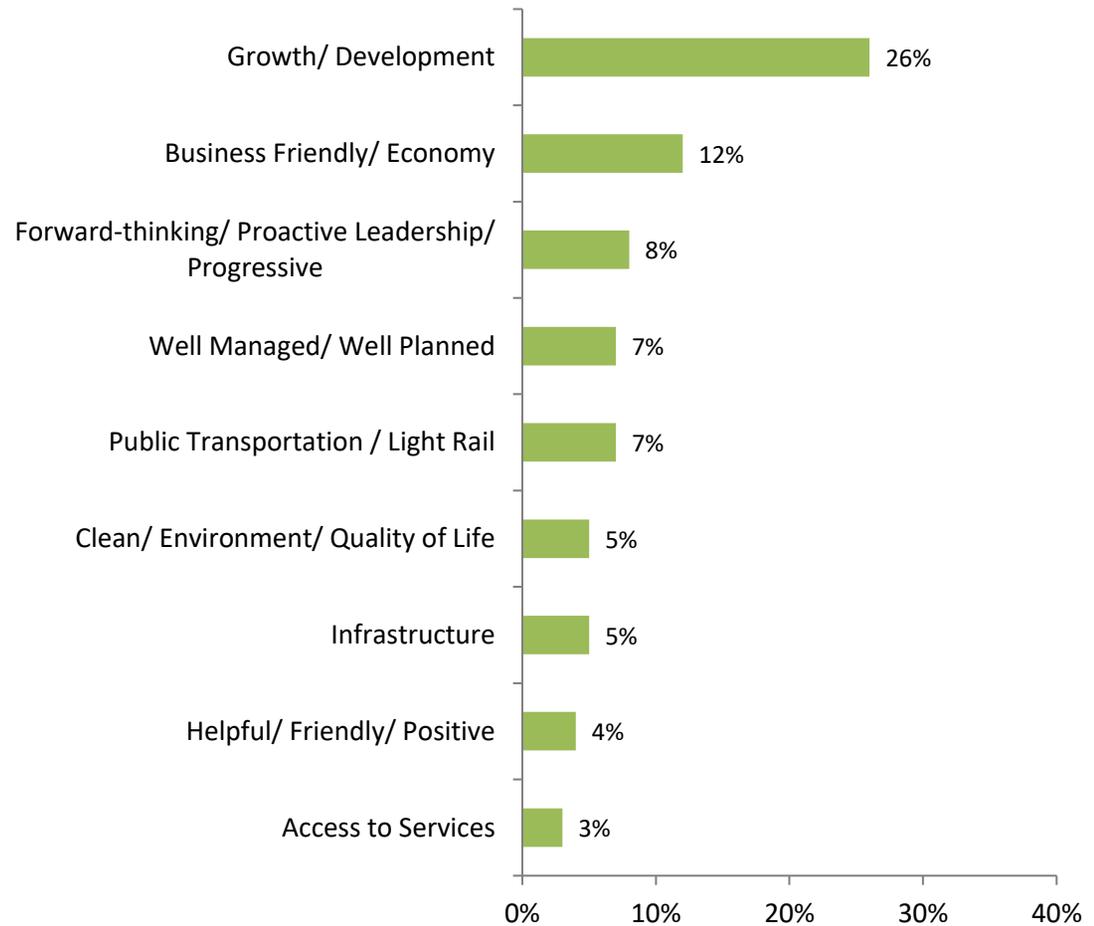
REASONS FOR MOVING IN THE RIGHT DIRECTION

Respondents were asked, via an open-ended question, to indicate why they thought that Bellevue was moving in the right or wrong direction. The open-end questions were post coded and summarized. The full text is in Appendix IV.

The most commonly mentioned response among those who indicated Bellevue was headed in the right direction is due to the amount and quality of growth and development happening in Bellevue.

Businesses also mentioned the state of Bellevue’s economy as well as the City’s leadership as reasons that Bellevue is headed in the right direction. The full verbatim text is in [Appendix VI](#).

Figure 11: Reasons Bellevue is Moving in the Right Direction (n=569)



BNWRG4_A— Using a one or two-word phrase, what are the reasons why you feel this way.
 Base: Respondents who answered NWRG4 with 6 or more (n=569).
 Open-ended multiple-response question: sums may add to greater than 100%.

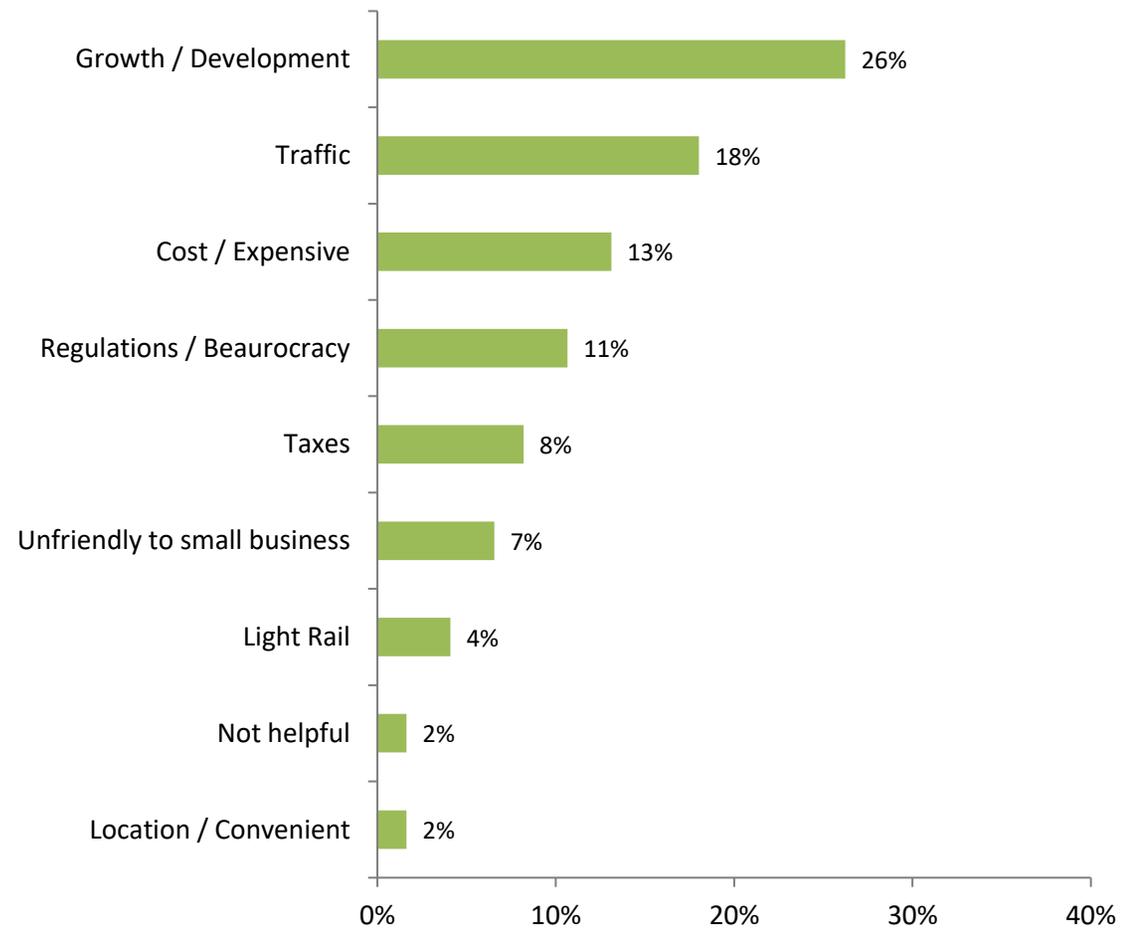
REASONS FOR MOVING IN THE WRONG DIRECTION

Only 30 percent of businesses ($n=122$) felt that Bellevue was moving in the wrong direction (answer of 4 or less on a scale from 0 to 10).

Too much growth and traffic are the top mentioned reasons businesses feel that Bellevue is not moving in the right direction. This is followed by the costs associated with doing business in Bellevue, dealing with regulations, and issues related to taxes.

Sample sizes for individual business sectors, geographies and other business demographics are not large enough to provide viable significance testing; however, the full verbatim text is in [Appendix VI](#).

Figure 12: Reasons Bellevue is Moving in the Wrong Direction ($n=122$)



BNWRG4_A— Using a one or two-word phrase, what are the reasons why you feel this way.

Base: Respondents who answered NWRG4 with 4 or less ($n=122$).

Open-ended multiple-response question: sums may add to greater than 100%.

[Blank page inserted for pagination purposes.]

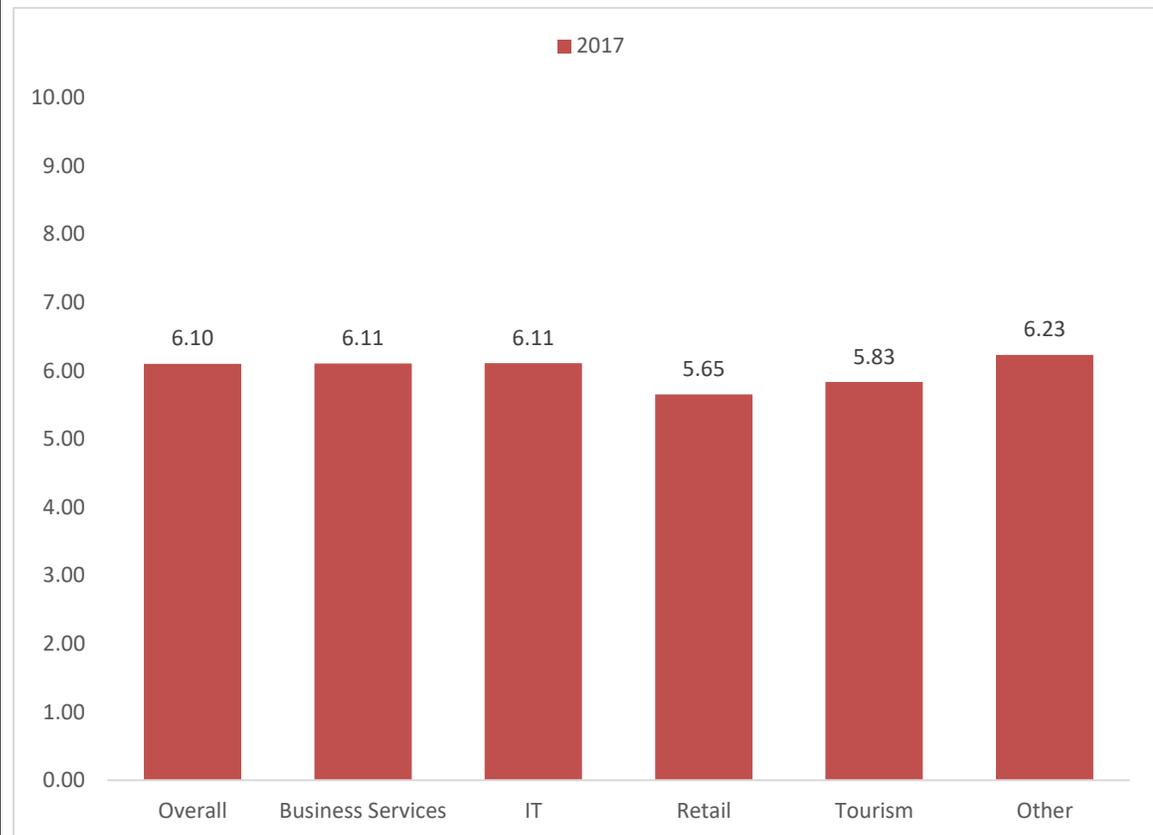
VALUE FOR TAX DOLLAR

All Business / Year-Over-Year

Overall, 59 percent of businesses feel that they are getting good to excellent value for their tax dollar paid.

The question text changed between 2015 and 2017 so no comparisons are made between the two survey waves.

Figure 13: Value Received for Money – Year-Over-Year



BNWRG6— Think about the taxes you pay in Bellevue and the services you receive from the City. What value do you feel you receive for your money?

+Question wording changed from 2015. Old wording was: “Thinking about services and facilities in Bellevue, do you feel you are getting your money’s worth for your tax dollar or not?”

Base: All respondents (2015=917; 2017=994)

Mean is based on an 11-point scale from 0 to 10

By Sector

There are no significant differences regarding the value received based on business sector.

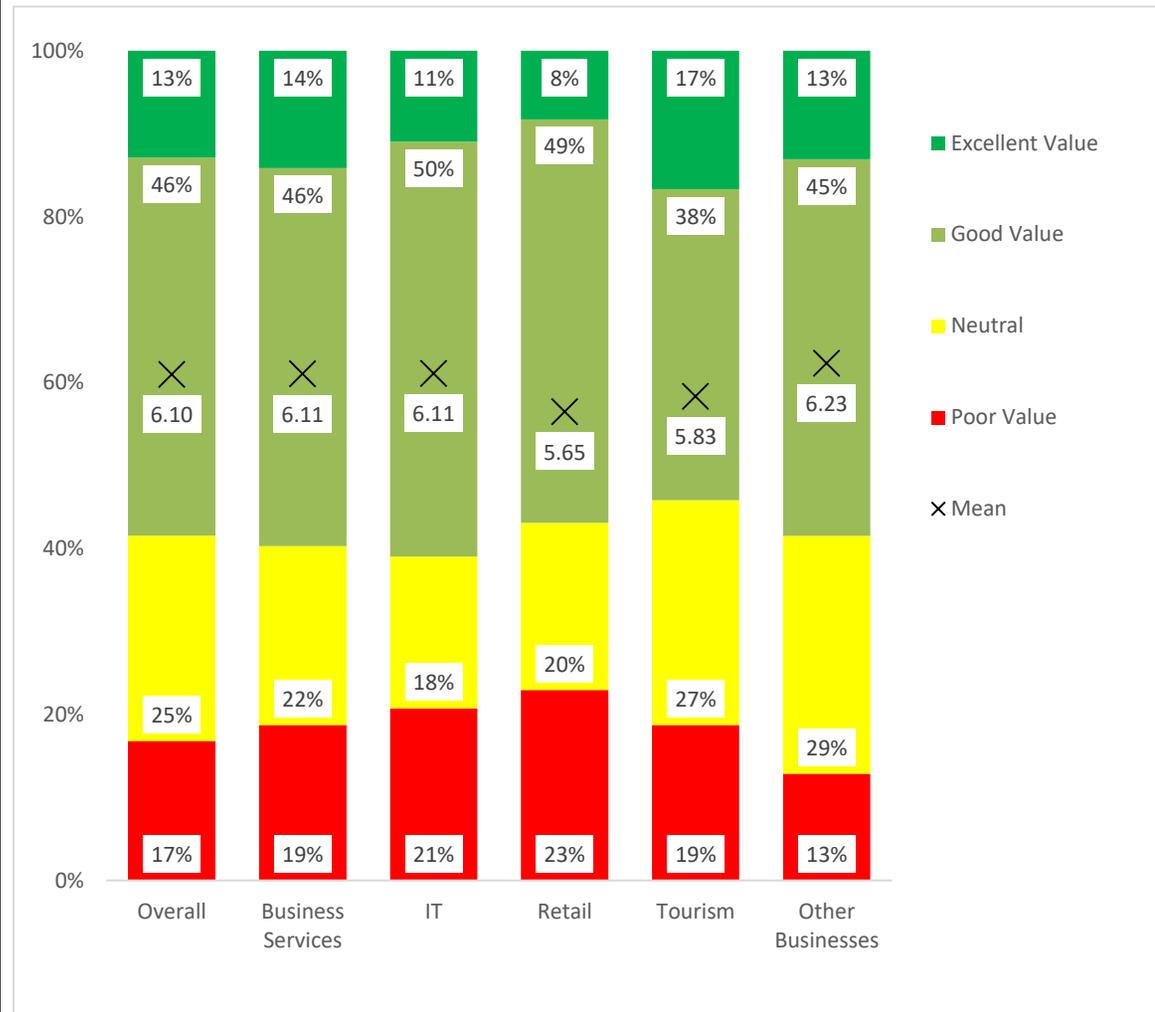
By Size

There are no significant differences based on the size of the business

By Age

Businesses founded in the 1980s provide the highest rating—mean of 6.70. This is significant when compared to business founded in the early 2000s—mean of 5.93.

Figure 14: Value Received for Money – By Sector – 2017 Only



BNWRG6— Think about the taxes you pay in Bellevue and the services you receive from the City. What value do you feel you receive for your money?

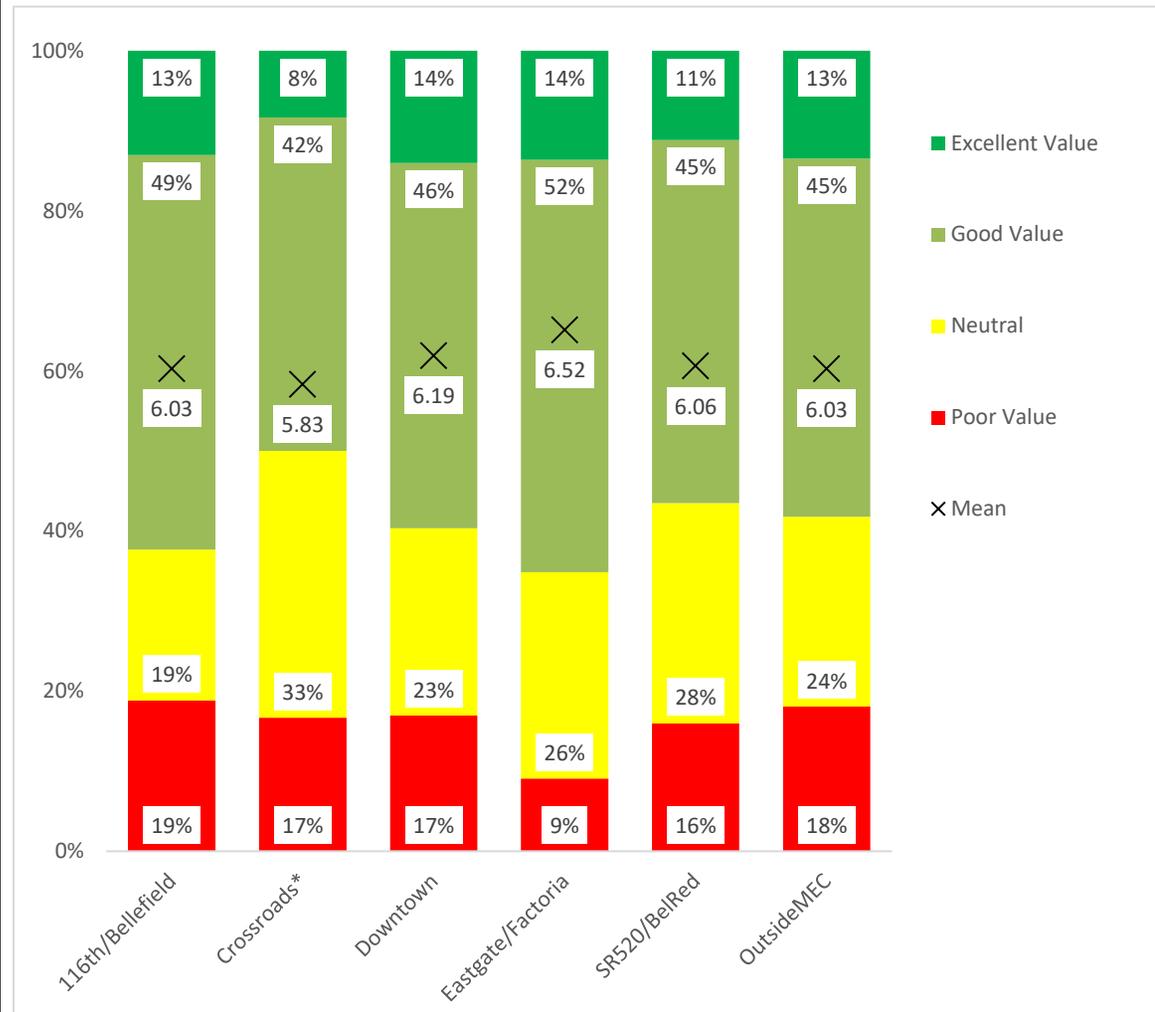
Base: All respondents (n=994); Business Services (n=294); IT (n=85); Retail (n=115); Tourism (n=48), Other (n=452)

Mean is based on an 11-point scale from 0 to 10

By Location

There are no significant differences regarding the value received based on the major employment center.

Figure 15: Value Received for Money – By MEC – 2017 Only



BNWRG6— Think about the taxes you pay in Bellevue and the services you receive from the City. What value do you feel you receive for your money?

+Question wording changed from 2015. Old wording was: “Thinking about services and facilities in Bellevue, do you feel you are getting your money’s worth for your tax dollar or not?”

Base: All respondents. 116th/Bellefield (n=75); Crossroads (n=13); Downtown (n=181); Eastgate/Factoria (n=96); SR 520/Bel-Red (n=278); Outside MEC (n=378) *Low base size

Mean based on an 11-point scale from 0 to 10

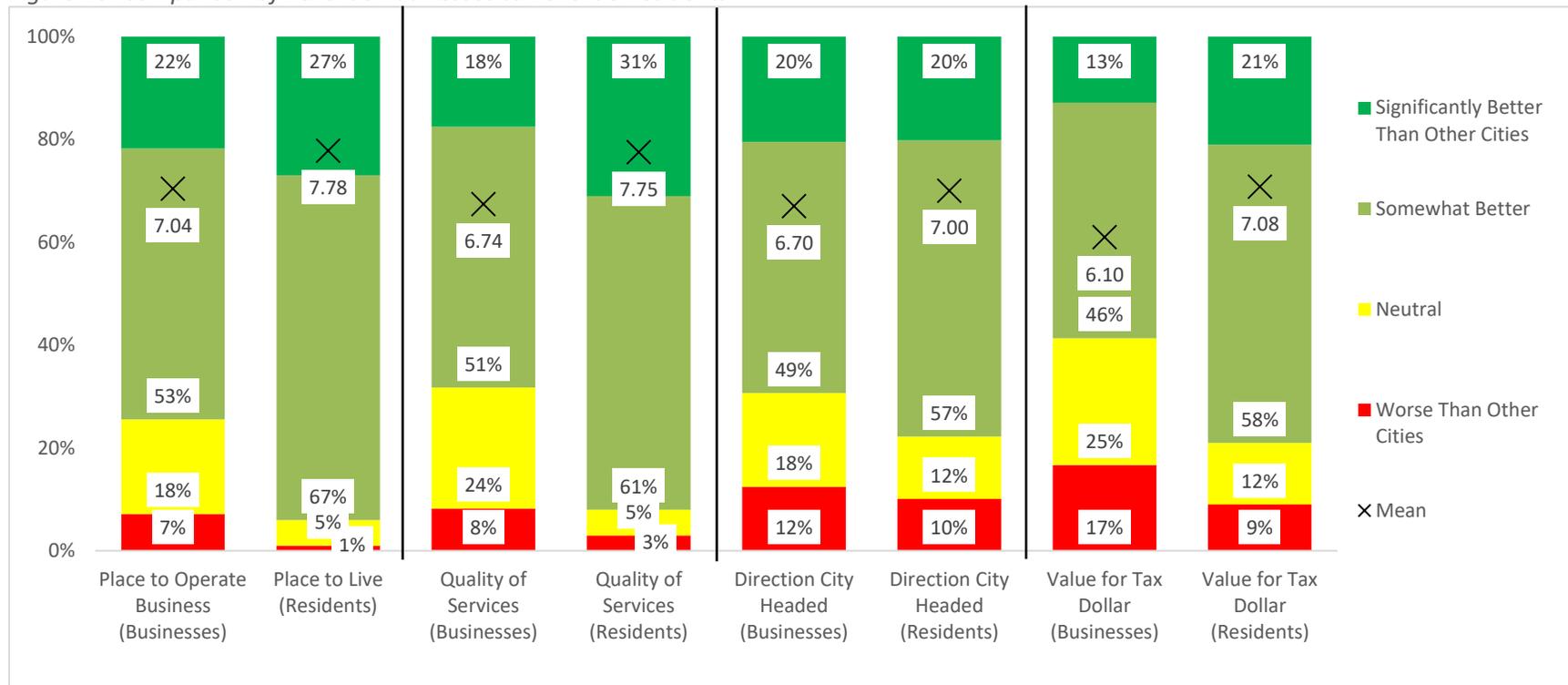
[Blank page inserted for pagination purposes.]

COMPARISON TO RESIDENTIAL SURVEY

Four of the questions in the 2017 Bellevue Business survey are similar to questions asked in the City of Bellevue’s Annual Performance Measures Survey. While the exact wording varies slightly between the two surveys, the four questions cover Bellevue as a Place to Operate a Business/Live, the Quality of Services Provided, the Direction the City is Headed, and Value of Services for Tax Dollar Paid.

While comparisons between these two groups are for illustrative purposes only, we see that Bellevue residents provide higher scores than do businesses for each of the four topic areas.

Figure 16: Comparison of Bellevue Businesses to Bellevue Residents



BNWRG / NWRG—Series questions are similar questions asked of businesses in this study and of residents in the 2015 Bellevue Performance Measures survey

Comparison for illustrative purposes only. No statistical comparisons performed between groups.

Base Businesses: All respondents (n=994) Base Residents: All respondents (n=511)

Mean is based on an 11-point scale from 0 to 10

[Blank page inserted for pagination purposes.]

MOST IMPORTANT BUSINESS-RELATED ISSUE FACING BELLEVUE

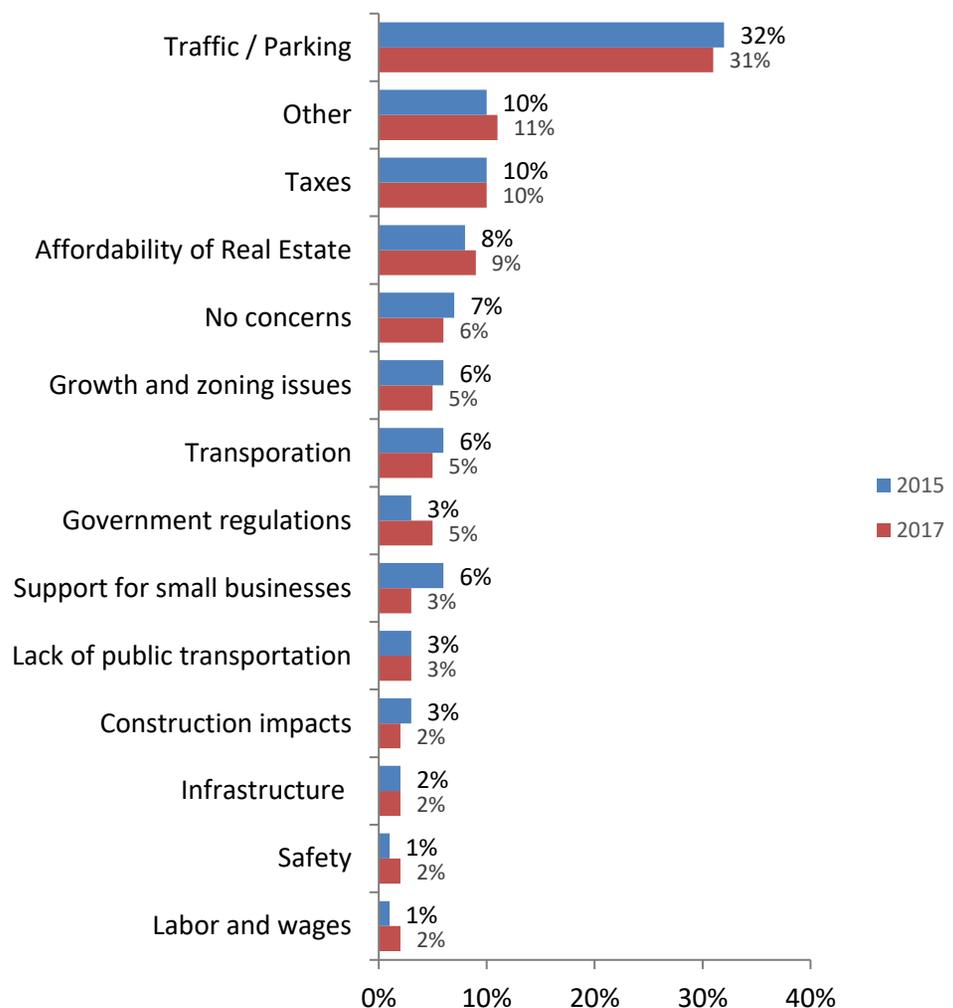
Businesses were asked to indicate what they believed is the biggest problem facing Bellevue in the next two years.

Traffic-related issues were the most often mentioned response, receiving over three times as many mentions as any other individual response.

While traffic is the most mentioned response across all geographic areas, businesses in Downtown Bellevue mention traffic most often; significantly more than those located outside any major employment center.

While, labor is relatively low overall, it is mentioned relatively often among businesses in the Tourism sector. Eight percent (8%) of these businesses mention labor as a problem facing Bellevue. Full verbatim responses grouped by business sector can be found in [Appendix IV](#).

Figure 17: Biggest Problems Facing Bellevue – Year-Over-Year



QA1A—What, if anything, is the biggest problem facing Bellevue that you feel the city should do something about over the next two years?

Base: All respondents (2015=917; 2017=994).

[Blank page inserted for pagination purposes.]

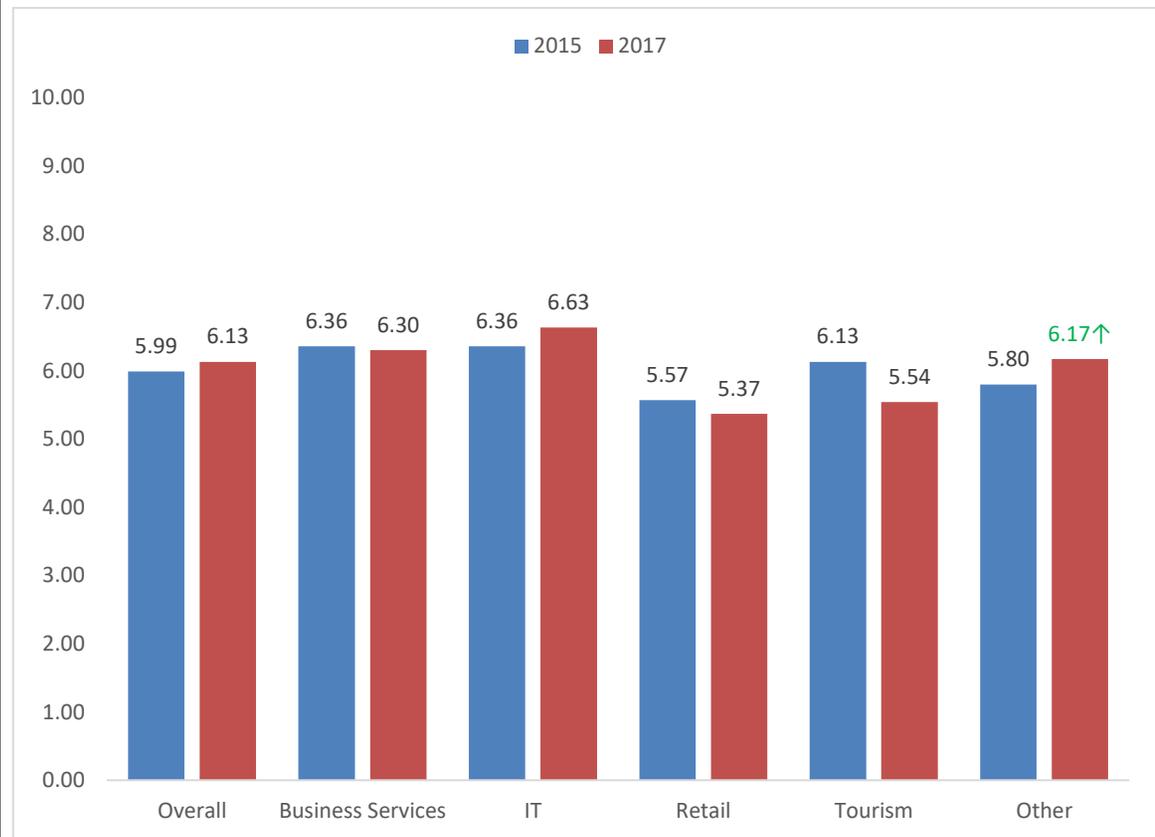
LIKELIHOOD TO RECOMMEND STARTING A BUSINESS IN BELLEVUE

All Business / Year-Over-Year

Just as in 2015, six-in-ten businesses are likely to recommend starting a business in Bellevue.

Ratings have remained consistent year over year across most sectors. However there has been a significant increase in businesses in the “Other” sector.

Figure 18: Likelihood of Recommending Starting a Business in Bellevue – Year-Over-Year



ADV1 - How likely are you to recommend starting a business in Bellevue?

Base: All respondents (2015=917; 2017=994)

Mean is based on an 11-point scale from 0 to 10

By Sector

Retail businesses are least likely to recommend opening a business in Bellevue. In fact, 16 percent of retail businesses state they are “Not at all Likely” to recommend starting a business. This is twice the rate of businesses in Tourism and three times the rate of those in Business Services and “Other” businesses.

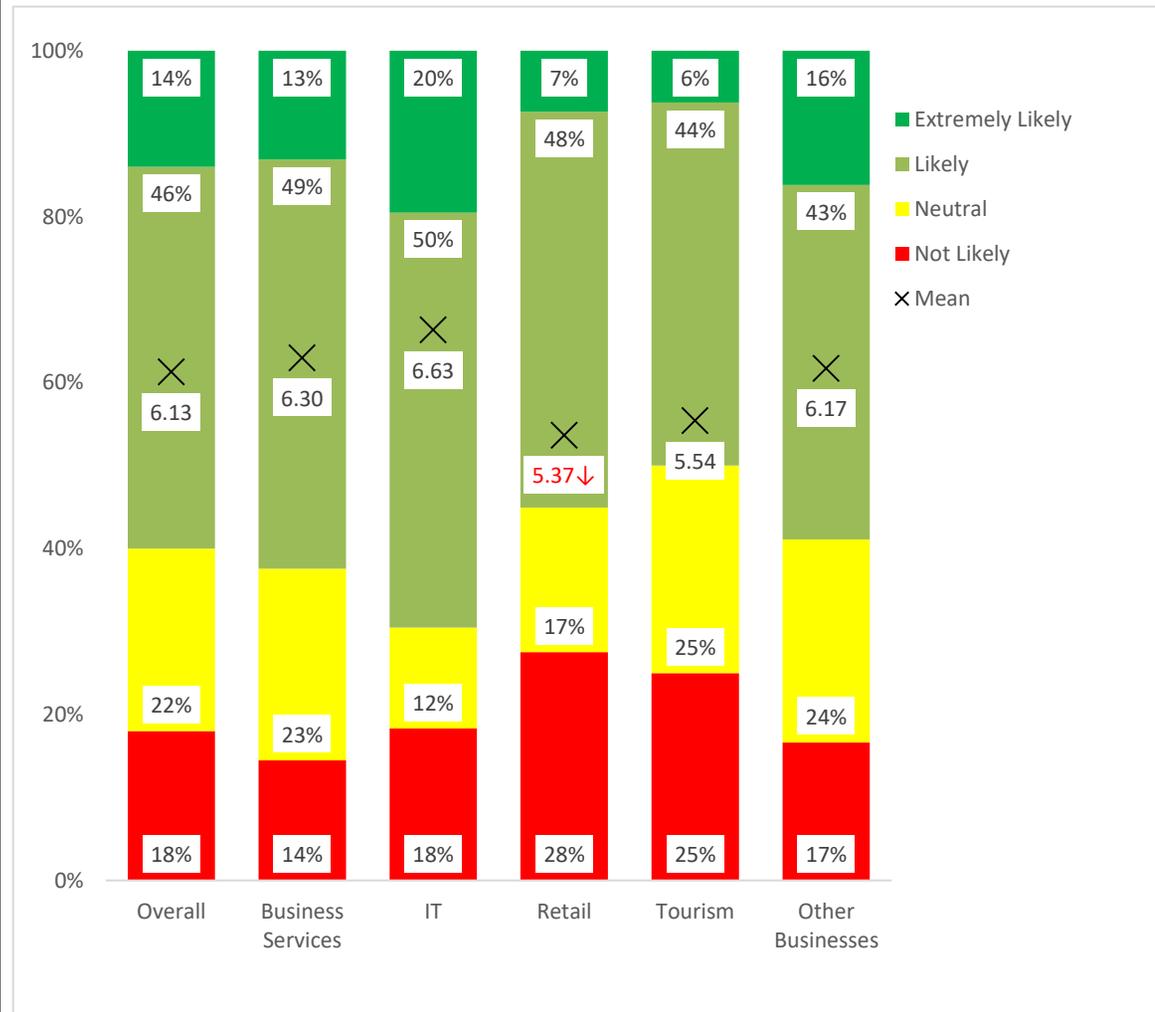
By Size

There are no significant differences in the likelihood of recommending starting a business based on the number of employees.

By Age

There is a trend in the likelihood of recommending starting a business based on when the business was founded. Newer businesses, those founded in 2010 or later, are the most likely to recommend starting a business—this is significantly higher than businesses founded prior to the year 2000.

Figure 19: Likelihood of Recommending Starting a Business in Bellevue – By Sector – 2017 Only



ADV1 - How likely are you to recommend starting a business in Bellevue?

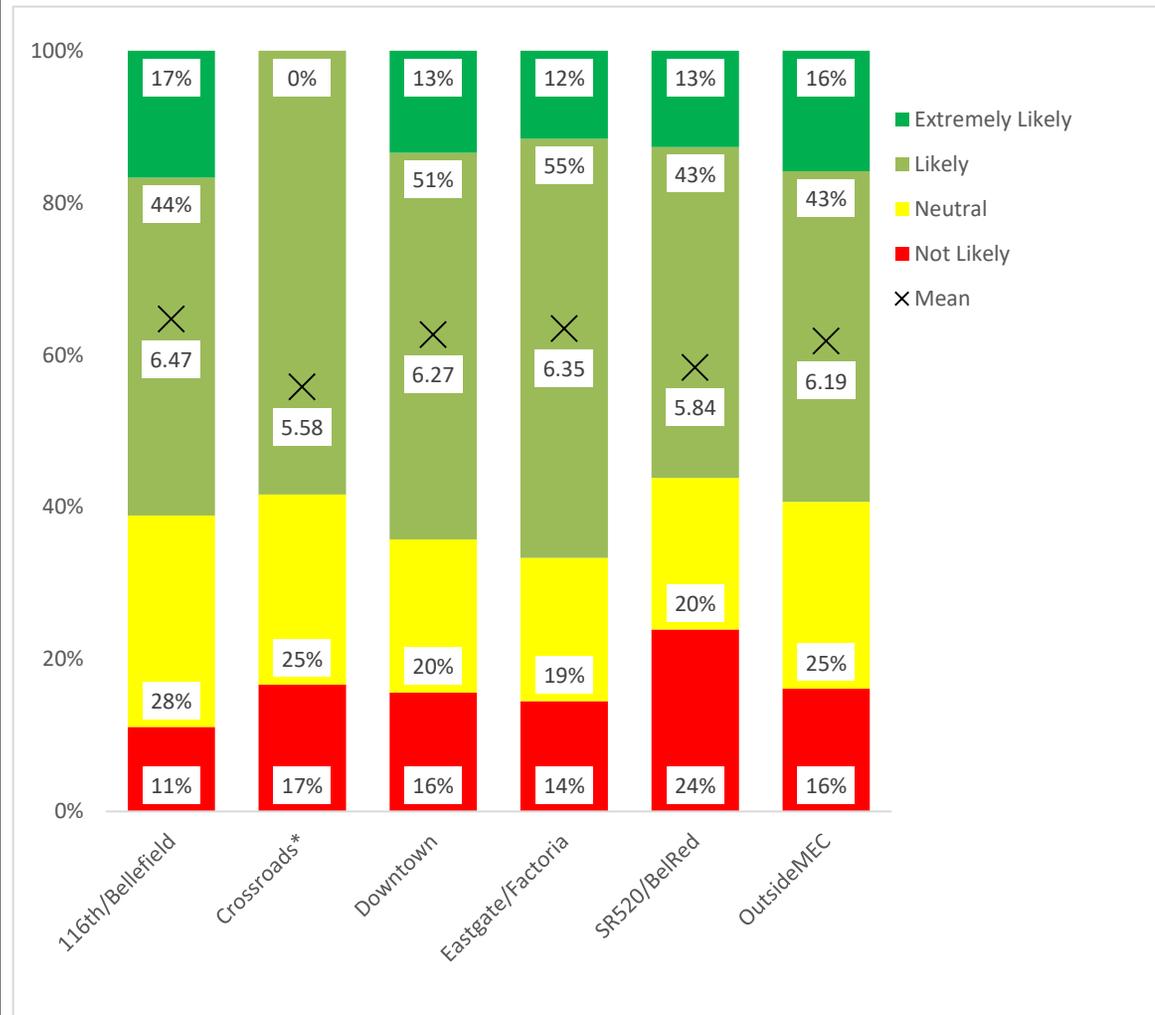
Base: All respondents (n=994); Business Services (n=294); IT (n=85); Retail (n=115); Tourism (n=48), Other (n=452)

Mean is based on an 11-point scale from 0 to 10

By Location

There are no significant differences in the likelihood of recommending starting a business based on the location of the business.

Figure 20: Likelihood of Recommending Starting a Business in Bellevue – By MEC – 2017 Only



ADV1 - How likely are you to recommend starting a business in Bellevue?

Base: All respondents. 116th/Bellefield (n=75); Crossroads (n=13); Downtown (n=181); Eastgate/Factoria (n=96); SR 520/Bel-Red (n=278); Outside MEC (n=378) *Low base size

Mean is based on an 11-point scale from 0 to 10

[Blank page inserted for pagination purposes.]

BELLEVUE’S ECONOMY COMPARED TO REST OF PUGET SOUND

All Businesses

Overall, ninety percent of businesses feel the Bellevue’s economy is better than other Puget Sound cities and towns—this is the same as 2015.

By Sector

Businesses in the Retail sector provide the lowest rating of Bellevue’s economy; this is significantly lower than businesses in the “Other” sector which provide the highest rating.

There are no differences within sectors when compared to 2015.

By Size

Businesses with 5 or fewer employees provide a significantly lower rating of Bellevue’s economy than businesses with more than 5 employees. This is primarily due 11 percent of small businesses—vs 5 percent of larger businesses—stating that Bellevue’s economy is “Neither Better nor Worse” than other Puget Sound communities.

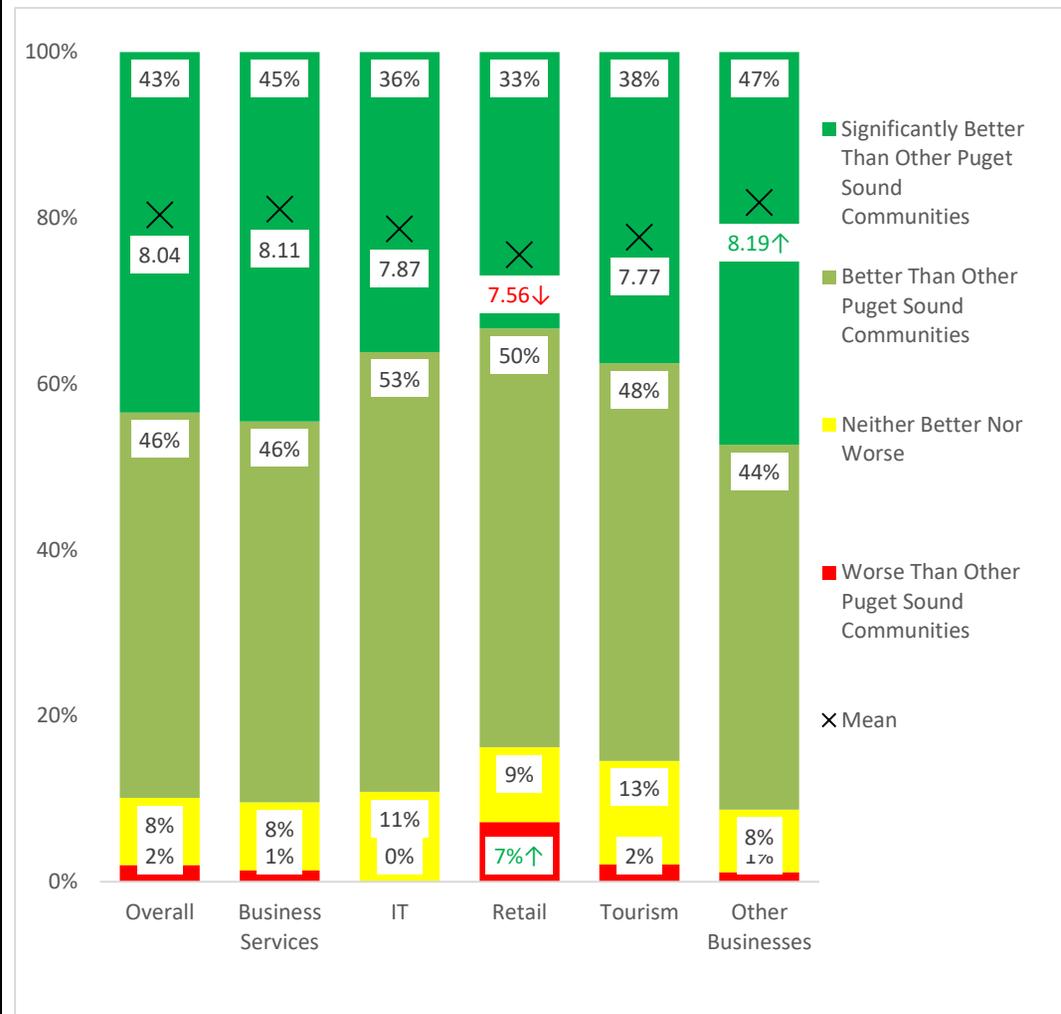
By Age

There are no differences based upon the age of the business.

By Location

There are no differences based upon the location of the business.

Figure 21: Current Bellevue Economy Compared to Puget Sound Communities – 2017 Only



BC1— Overall, how would you rate the current state of Bellevue’s economy compared to other cities and towns in the Puget Sound region?

Base: All respondents (n=994); Business Services (n=294); IT (n=85); Retail (n=115); Tourism (n=48), Other (n=452)

Mean is based on an 11-point scale from 0 to 10

[Blank page inserted for pagination purposes.]

FACTORS WITH THE BIGGEST IMPACT ON BUSINESSES

OVERALL IMPACT FACTORS

All Businesses

Businesses were provided a list of factors that could affect their business and asked to indicate which one would have the largest impact on their business over the next three to five years.

The factors that will have the biggest impact overall are: Workforce, Transportation, Business and Occupation Taxes, and Business Regulations—these are the same factors as in 2015 and are in the same order.

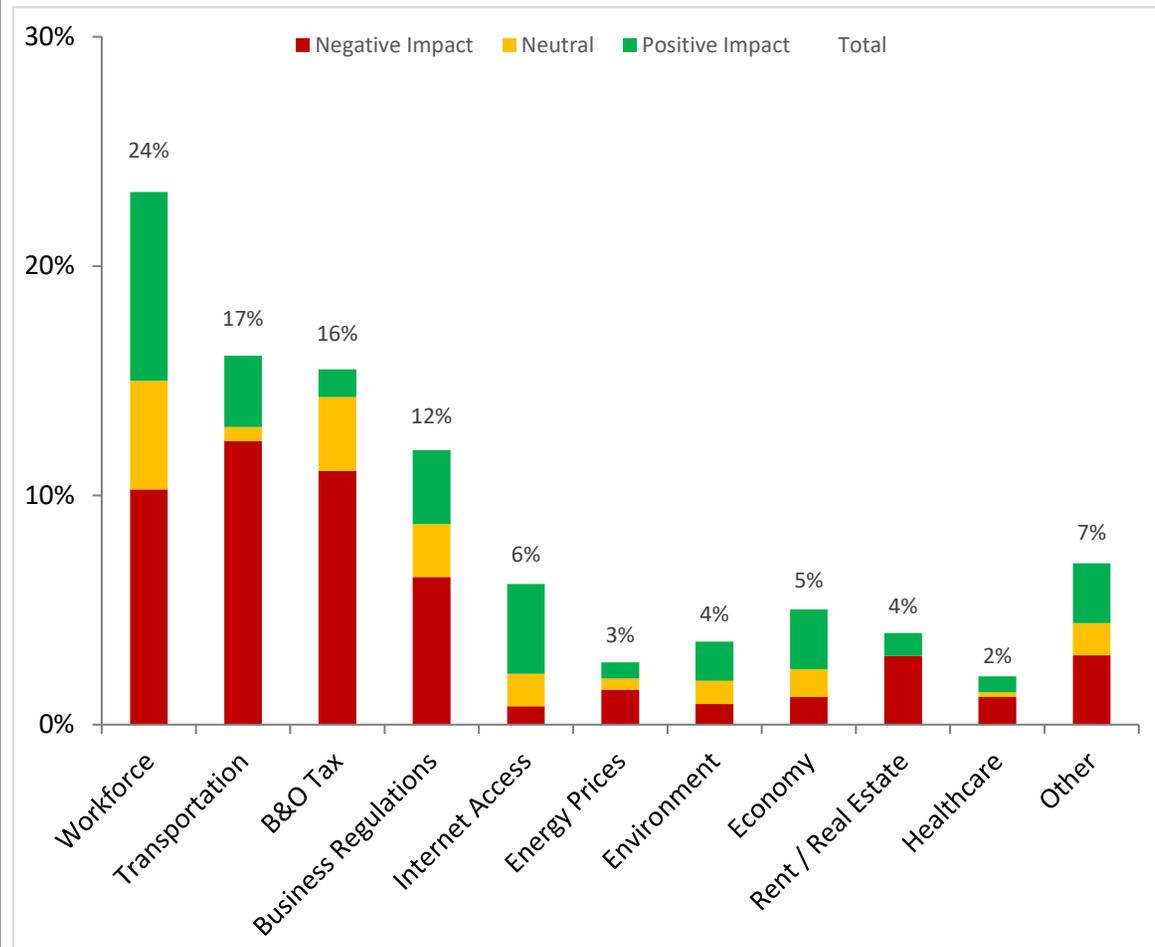
This question was followed by asking businesses if that factor would have a positive or negative impact on their business. This is shown on the table to the right.

Overall, businesses state that the Workforce will have the biggest impact; yet the nature of the impact is split between positive and negative.

Transportation is the second most mentioned factor, and the majority all businesses who mentioned transportation indicated that it would have a negative impact.

Cost of doing business such as Business and Occupation Taxes and Business Regulations are third and fourth most commonly mentioned. While most businesses feel that these factors will have a negative impact, quite a few feel that the impact will be neither positive nor negative.

Figure 22: Factors with the Biggest Impact – 2017 Only



ST5 - Which of the following factors will have the biggest impact on your business in the next three to five years?

ST6 - When thinking about how [FACTOR INDICATED IN ST5] will impact your business over the next few years, do you believe that the impact will be... [Greatly positive, somewhat positive, neither positive nor negative, somewhat negative, greatly negative]

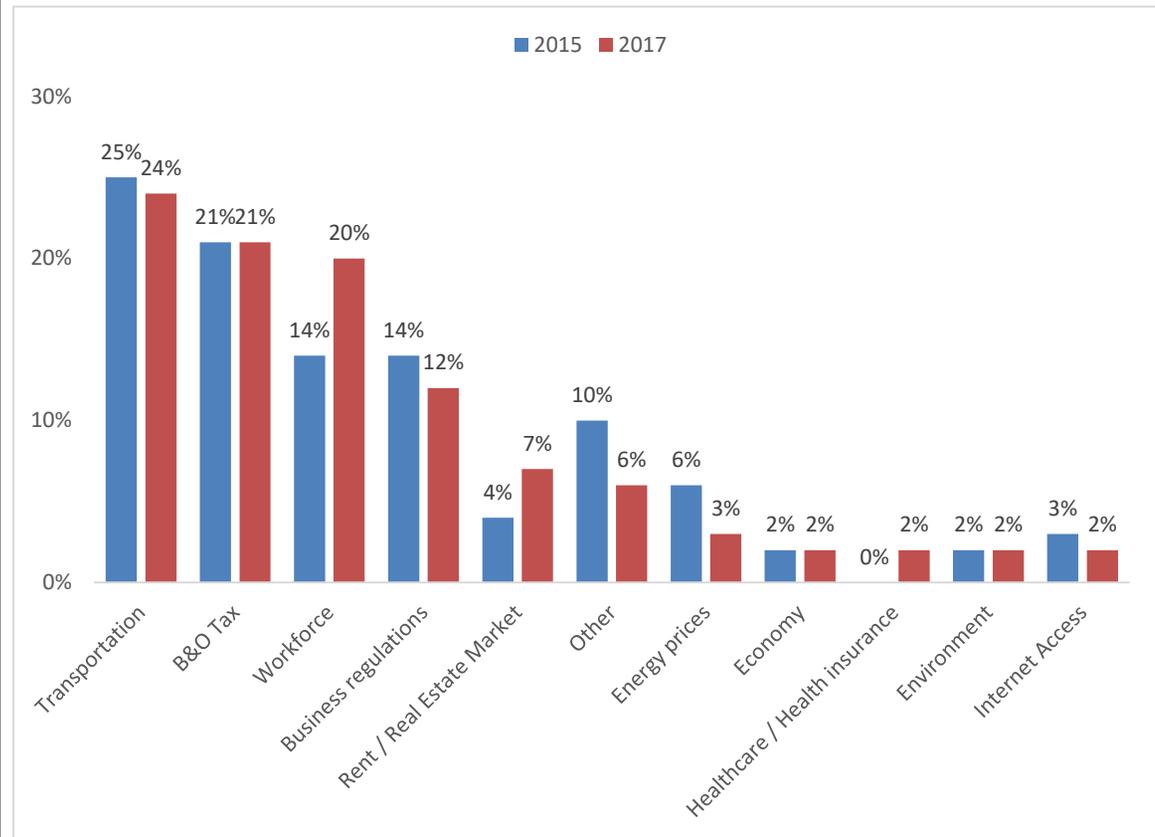
Base: All respondents (n=994)

Negative Impact Year Over Year

Isolating those factors that will have a negative impact shows that the biggest issues are Transportation, B&O Taxes, Workforce, and Business Regulations.

Overall, this is similar to 2015, however mentions of Workforce having a negative impact have increased significantly.

Figure 23: Factors with the Biggest Negative Impact – Year over Year



ST5 - Which of the following factors will have the biggest impact on your business in the next three to five years?

ST6 – When thinking about how [FACTOR INDICATED IN ST5] will impact your business over the next few years, do you believe that the impact will be. . . [Greatly positive, somewhat positive, neither positive nor negative, somewhat negative, greatly negative]

Base: All respondents (2015=917; 2017=994).

By Sector

Business Services

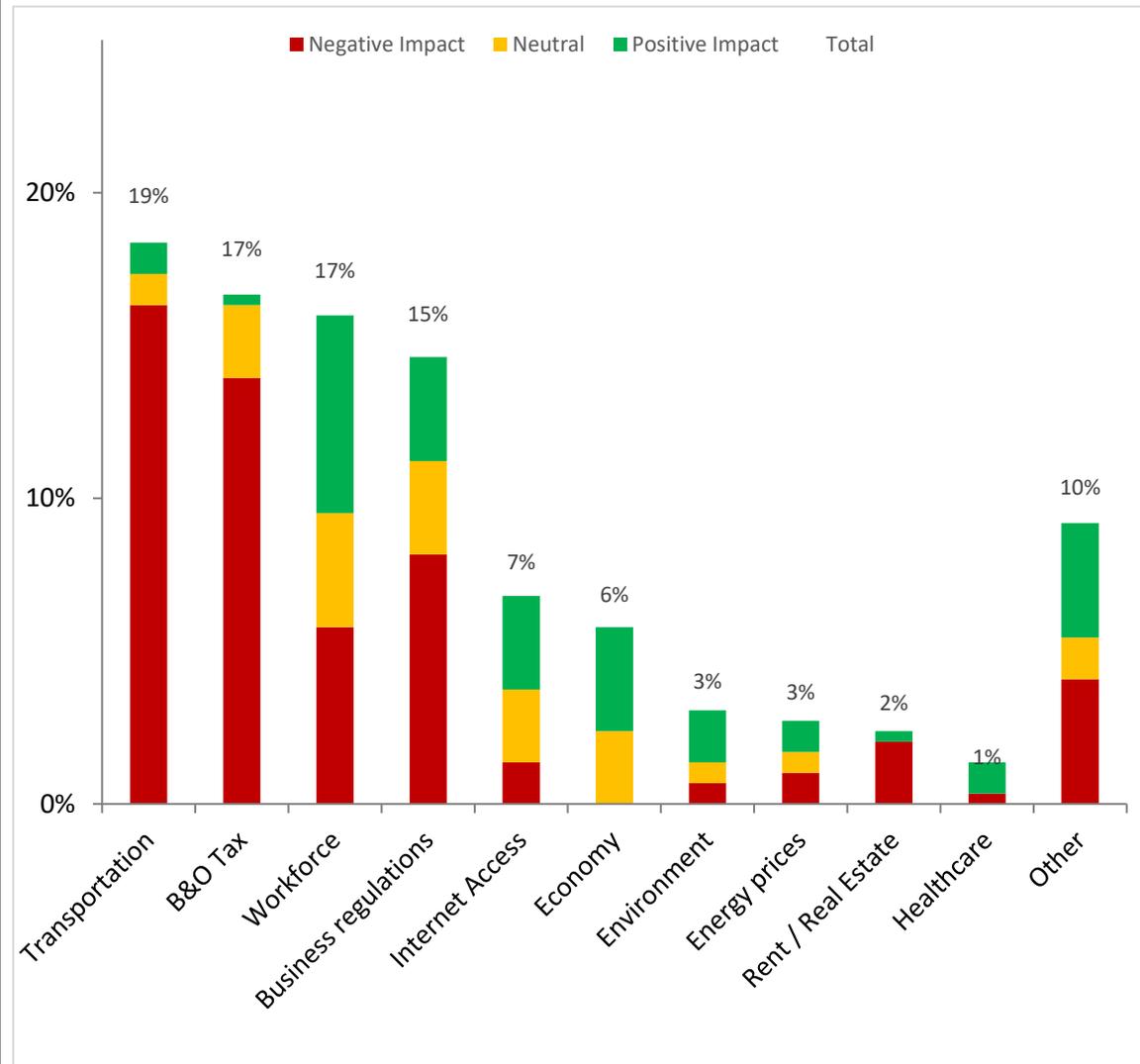
Transportation, B&O Taxes, and the Workforce are the top factors mentioned among businesses in the Business Services sector.

Nearly all Business Services feel that Transportation and B&O Taxes will have a negative impact.

Conversely, Business Services are optimistic regarding the future of the workforce.

Business Services are mixed regarding the impact of business regulations.

Figure 24: Factors with the Biggest Impact – Business Services – 2017 Only



ST5 - Which of the following factors will have the biggest impact on your business in the next three to five years?
 ST6 – When thinking about how [FACTOR INDICATED IN ST5] will impact your business over the next few years, do you believe that the impact will be. . . [Greatly positive, somewhat positive, neither positive nor negative, somewhat negative, greatly negative]
 Base: Business Services (n=294)

Information Technology

The workforce is the top mentioned factor for Information Technology businesses. Mentions of the workforce are significantly higher among IT than most other business sectors (the exception is the Tourism sector).

Most of Information Technology businesses feel that the workforce will positively affect their business.

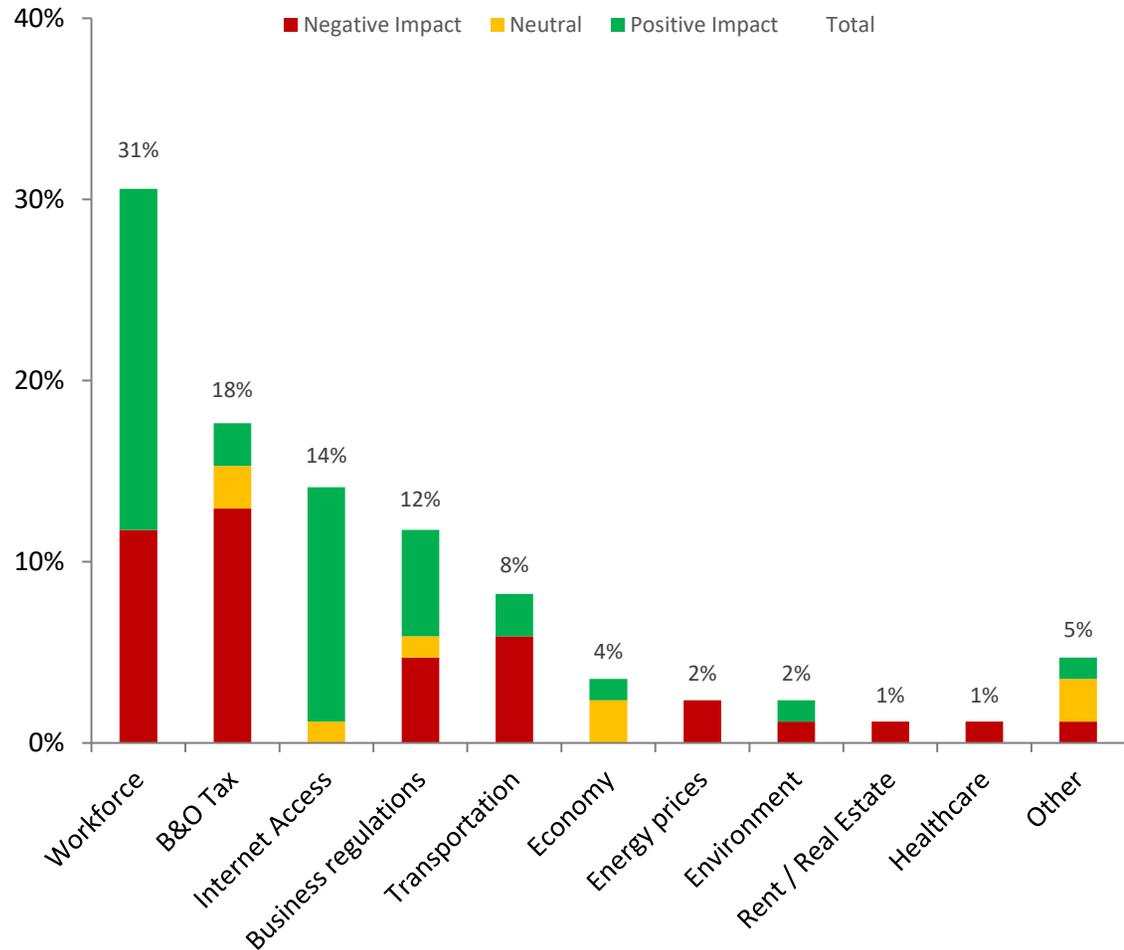
B&O Tax is the second most important factor to Information Technology businesses and most IT businesses believe this will have a negative impact.

Internet access is the third most important factor to Information Technology businesses—significantly more so than to other sectors.

Most IT businesses believe that internet will positively affect their business.

Very few businesses in the IT sector mentioned Transportation as a major factor to their business in the next few years.

Figure 25: Factors with the Biggest Impact – Information Technology – 2017 Only



ST5 - Which of the following factors will have the biggest impact on your business in the next three to five years? ST6 - [ASK IF ST5<998] When thinking about how [INSERT ANSWER FROM ST5] will impact your business over the next few years, do you believe that the impact will be . . .
Base: Information Technology (n=85)

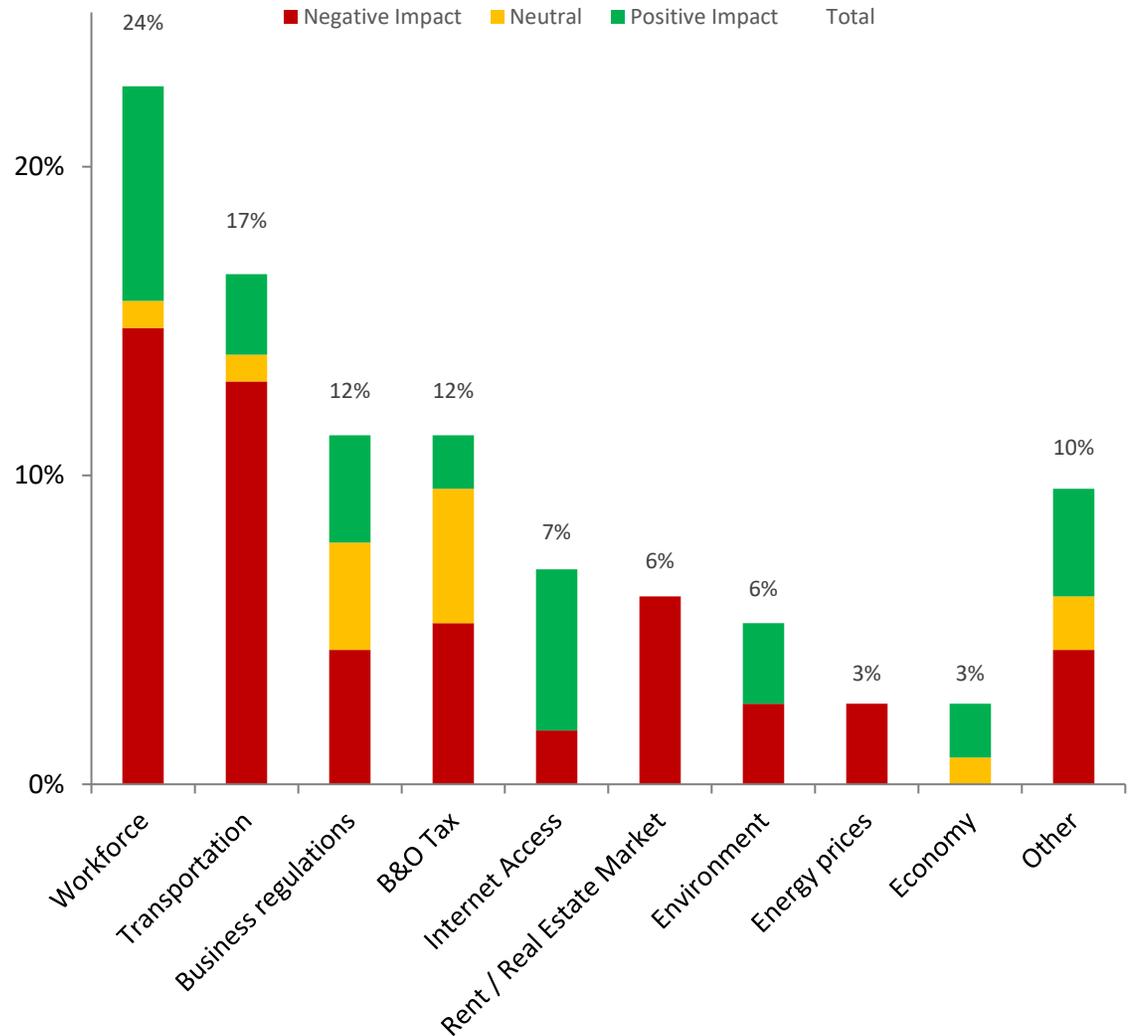
Retail

Workforce and Transportation are the factors mentioned most often as having the largest impact to Retail businesses.

Retail businesses believe that these factors will primarily have a negative impact.

Business regulations and B&O taxes both receive twelve percent of mentions, and retail businesses are mixed on the impact these will have on their business in the coming years.

Figure 26: Factors with the Biggest Impact – Retail – 2017 Only



ST5 - Which of the following factors will have the biggest impact on your business in the next three to five years? ST6 - [ASK IF ST5<998] When thinking about how [INSERT ANSWER FROM ST5] will impact your business over the next few years, do you believe that the impact will be . . .
Base: Retail (n=115)

Tourism

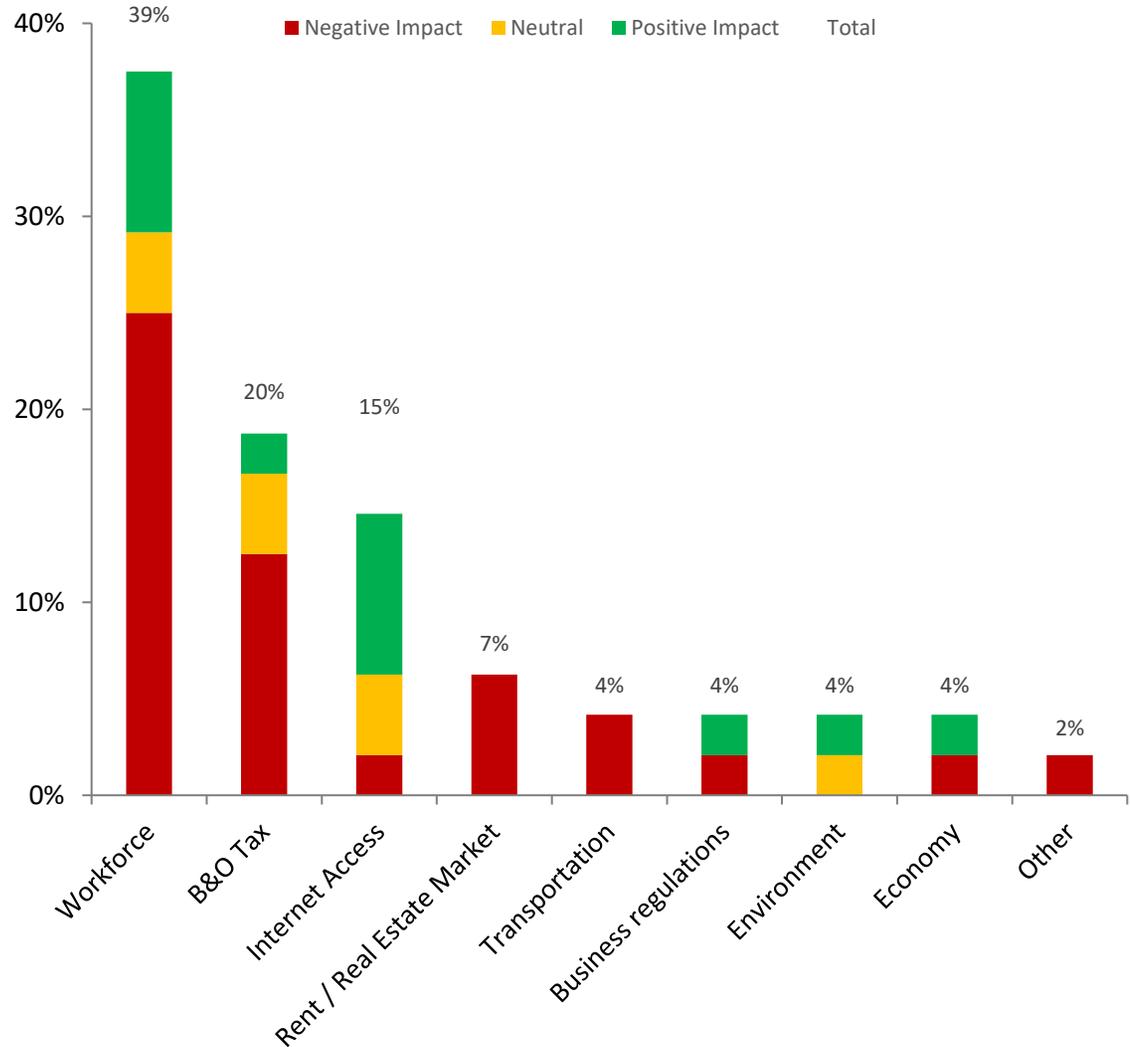
The workforce is the top mentioned factor for Tourism. Mentions of the workforce are significantly higher among Tourism than all but Information Technology businesses.

Three times as many Tourism businesses state that the workforce will have a negative rather than positive impact on their business—this is significantly higher than all other sectors.

B&O Taxes are the second most mentioned factor—four out of five believe that it will negatively affect their business.

Internet access, the factor with the third biggest impact, is the only factor where businesses in the Tourism sector are more likely to believe it will have a positive, rather than negative, impact over the next few years.

Figure 27: Factors with the Biggest Impact – Tourism – 2017 Only



ST5 - Which of the following factors will have the biggest impact on your business in the next three to five years? ST6 - [ASK IF ST5<998] When thinking about how [INSERT ANSWER FROM ST5] will impact your business over the next few years, do you believe that the impact will be . . .
Base: Tourism (n=48)

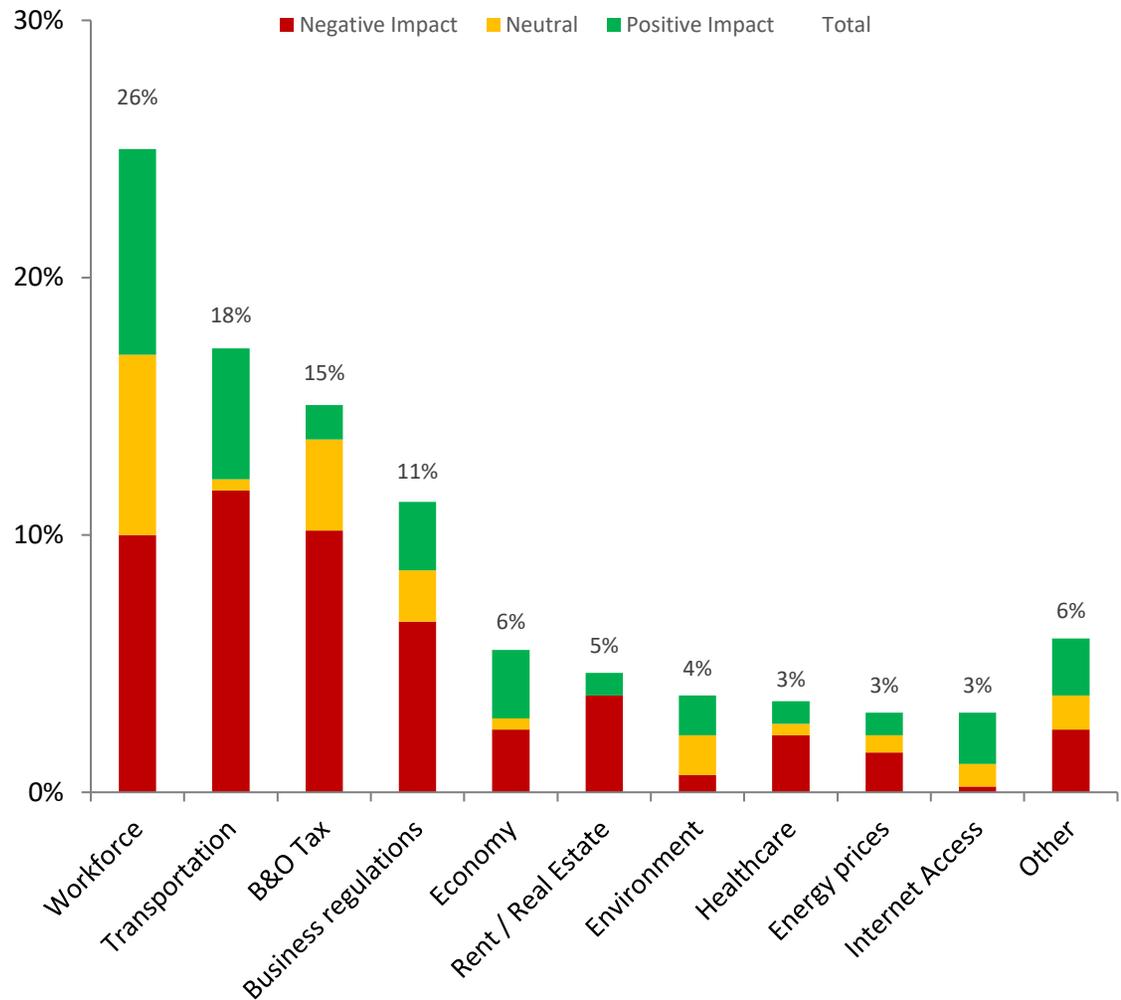
Other businesses

The workforce is also the most mentioned factor to “Other” businesses in Bellevue and have mixed feelings as to whether that impact will be positive or negative.

Transportation is the second most mentioned factor to “Other” businesses with the majority stating that transportation will negatively affect their business.

B&O Tax is the third most mentioned factor and the majority state this will have a negative impact on their business.

Figure 28: Factors with the Biggest Impact – “Other” Sector – 2017 Only



ST5 - Which of the following factors will have the biggest impact on your business in the next three to five years? ST6 - [ASK IF ST5<998] When thinking about how [INSERT ANSWER FROM ST5] will impact your business over the next few years, do you believe that the impact will be . . .
Base: Other (n=452)

[Blank page inserted for pagination purposes.]

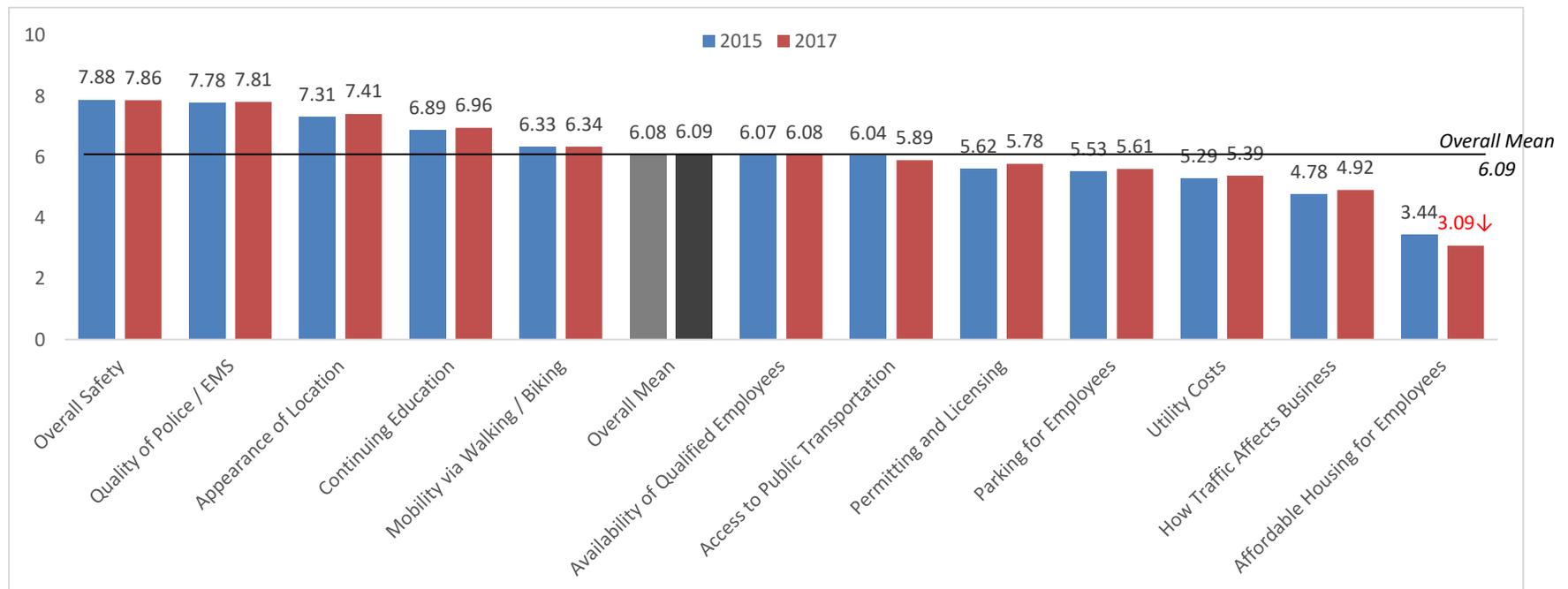
KEY FINDINGS—COMMUNITY CHARACTERISTICS

OVERALL COMMUNITY CHARACTERISTICS

Businesses were shown 12 key attributes that pertain to running a business in Bellevue and asked to compare Bellevue to other cities and towns for each attribute. Businesses used an 11-point scale where “0” indicated Bellevue was “significantly worse than other cities and towns” and “10” indicated Bellevue was “significantly better than other cities and towns. Bellevue’s overall ranking of 6.09 is the same as in 2015 and indicates that Bellevue is similar to other cities and towns when all things are considered. However, there are a few key areas where Bellevue does significantly better than or worse than other cities and towns.

Bellevue continues to perform better than other cities and towns in areas focused around safety and appearance. Bellevue is underperforming in areas regarding traffic and affordability. Affordable housing for employees is the only attribute to change when compared to 2015. Ratings for this attribute decreased significantly

Figure 29: Community Characteristics for Operating a Business in Bellevue – Year over Year



CC1— From what you have experienced, seen, or heard, compared with other cities and towns, how would you rate Bellevue on each of the following items?

Base: All respondents (2015=917; 2017=994)

Mean is based on an 11-point scale from 0 to 10

BUSINESS ATTRIBUTES

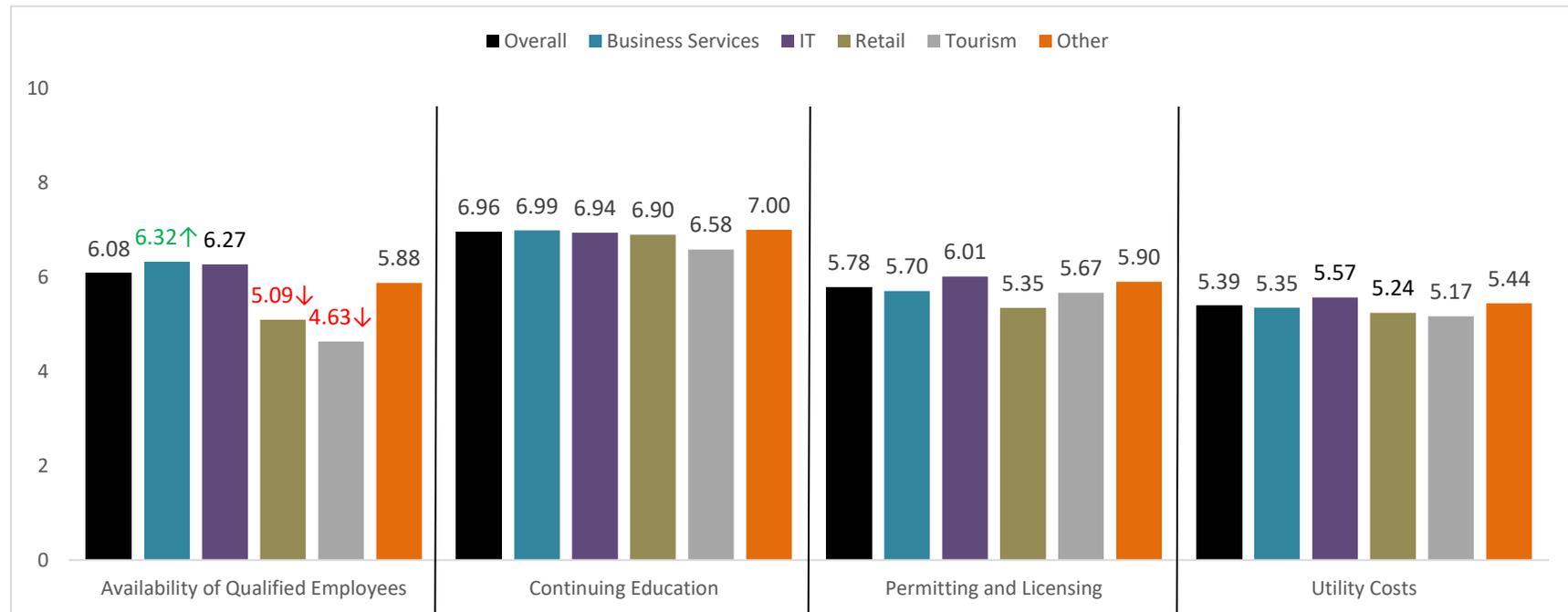
Availability of Qualified Employees: Businesses in the Retail and Tourism sectors rate Bellevue significantly lower than other businesses regarding the availability of qualified employees. Additionally, ratings have dropped from 2015 for businesses in tourism—from 5.65 to 4.63. Businesses with 5 or fewer employees provide higher ratings than larger businesses.

Continuing Education: There are no differences based on year, sector, location, size, or age of business.

Permitting and Licensing: Ratings have increased from 2015 for businesses in the “Other” sector—from 5.52 to 5.90. There are no other differences.

Utility Costs: There are no difference based on year, sector, location, size, or age of business.

Figure 30: Business Attributes for Operating a Business in Bellevue by Sector – 2017 Only



CC1— From what you have experienced, seen, or heard, compared with other cities and towns, how would you rate Bellevue on each of the following items?

Base: All respondents (2015=917; 2017=994)

Mean is based on an 11-point scale from 0 to 10

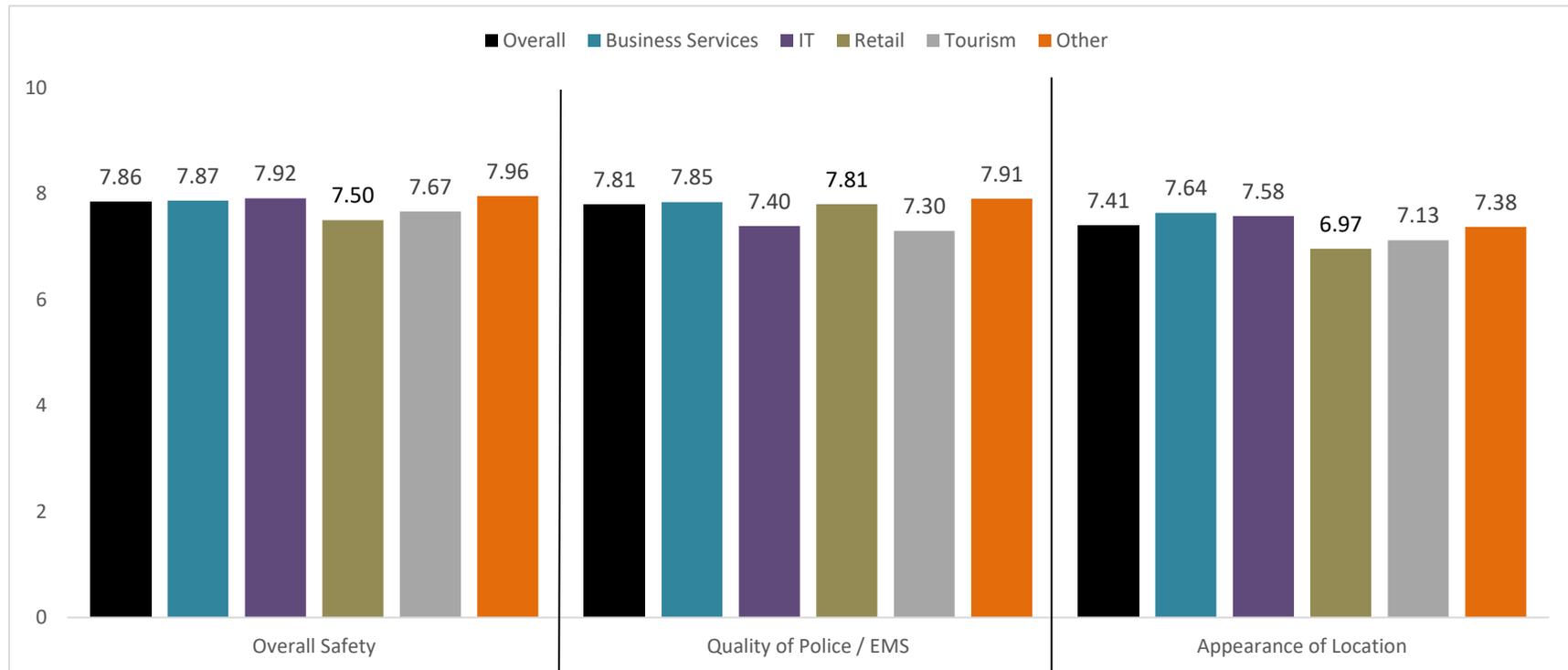
PHYSICAL ATTRIBUTES

Overall Safety: There are no difference based on year, sector, location, size, or age of business.

Quality of Police / EMS: Businesses founded in the 21st century continue to rate the quality of police and EMS services significantly lower than businesses founded prior to 2000.

Appearance of Location: Businesses located in Downtown Bellevue rate the physical appearance of the area higher than businesses located elsewhere. While businesses located in the Bel-Red / SR-520 area provide the lowest rating for physical appearance of the area.

Figure 31: Safety Attributes for Operating a Business in Bellevue – 2017 Only



CC1— From what you have experienced, seen, or heard, compared with other cities and towns, how would you rate Bellevue on each of the following items?

Base: All respondents (2015=917; 2017=994)

Mean is based on an 11-point scale from 0 to 10

TRANSPORTATION AND HOUSING ATTRIBUTES

Mobility via Walking/Biking: Ratings for walking and biking options highest among businesses located in Downtown Bellevue.

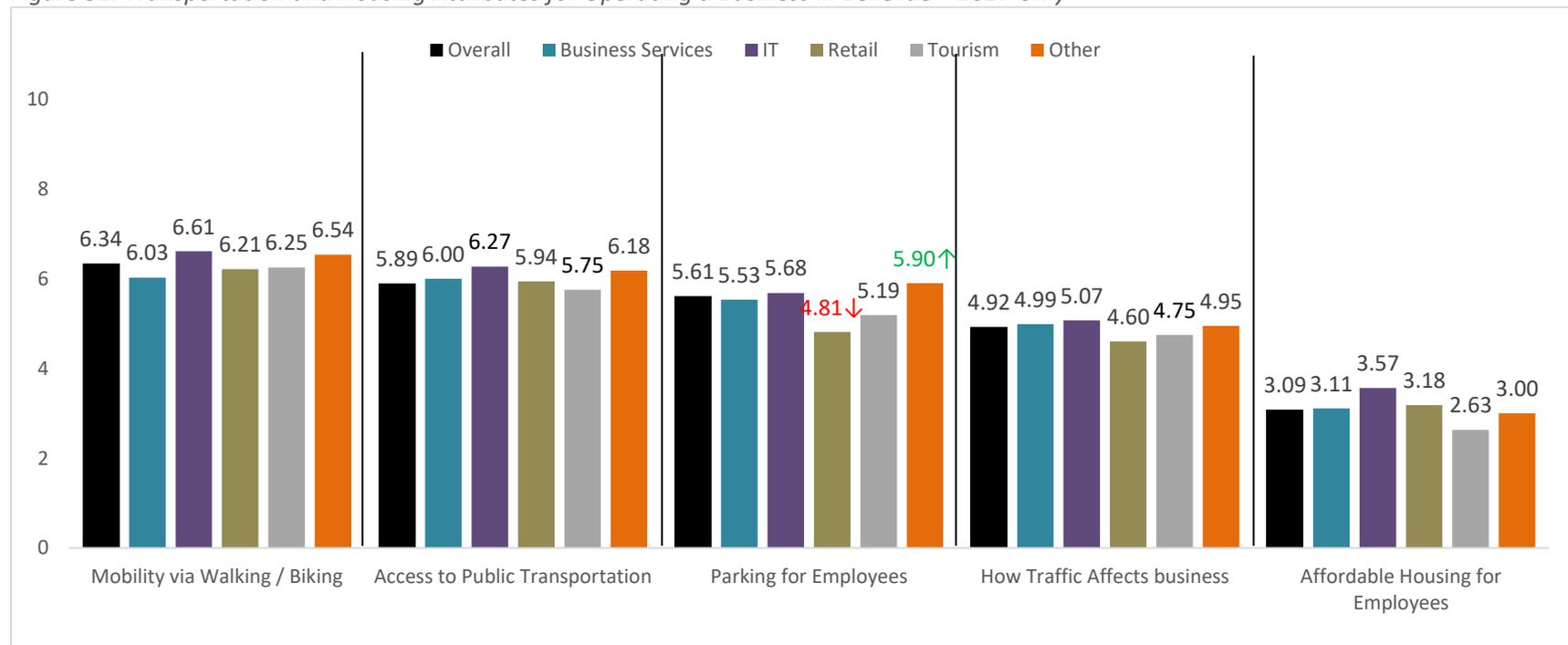
Access to Public Transportation: There are no difference based on year, sector, location, size, or age of business.

Parking for Employees: Businesses located in Downtown Bellevue give the lowest ratings for availability of parking for their employees.

Traffic Impacts: Businesses with five or fewer employees give traffic lower ratings than businesses with more than 5 employees. There are no significant differences based on the location of the business.

Affordable Housing: Ratings for affordable housing are the lowest for all sectors and dropped between 2015 and 2017. The drop occurred in all sectors but was particularly notable for businesses in the Business Services and Tourism sectors.

Figure 32: Transportation and Housing Attributes for Operating a Business in Bellevue – 2017 Only



CC1— From what you have experienced, seen, or heard, compared with other cities and towns, how would you rate Bellevue on each of the following items?

Base: All respondents (2015=917; 2017=994)

Mean is based on an 11-point scale from 0 to 10

KEY FINDINGS—BUSINESS HEALTH

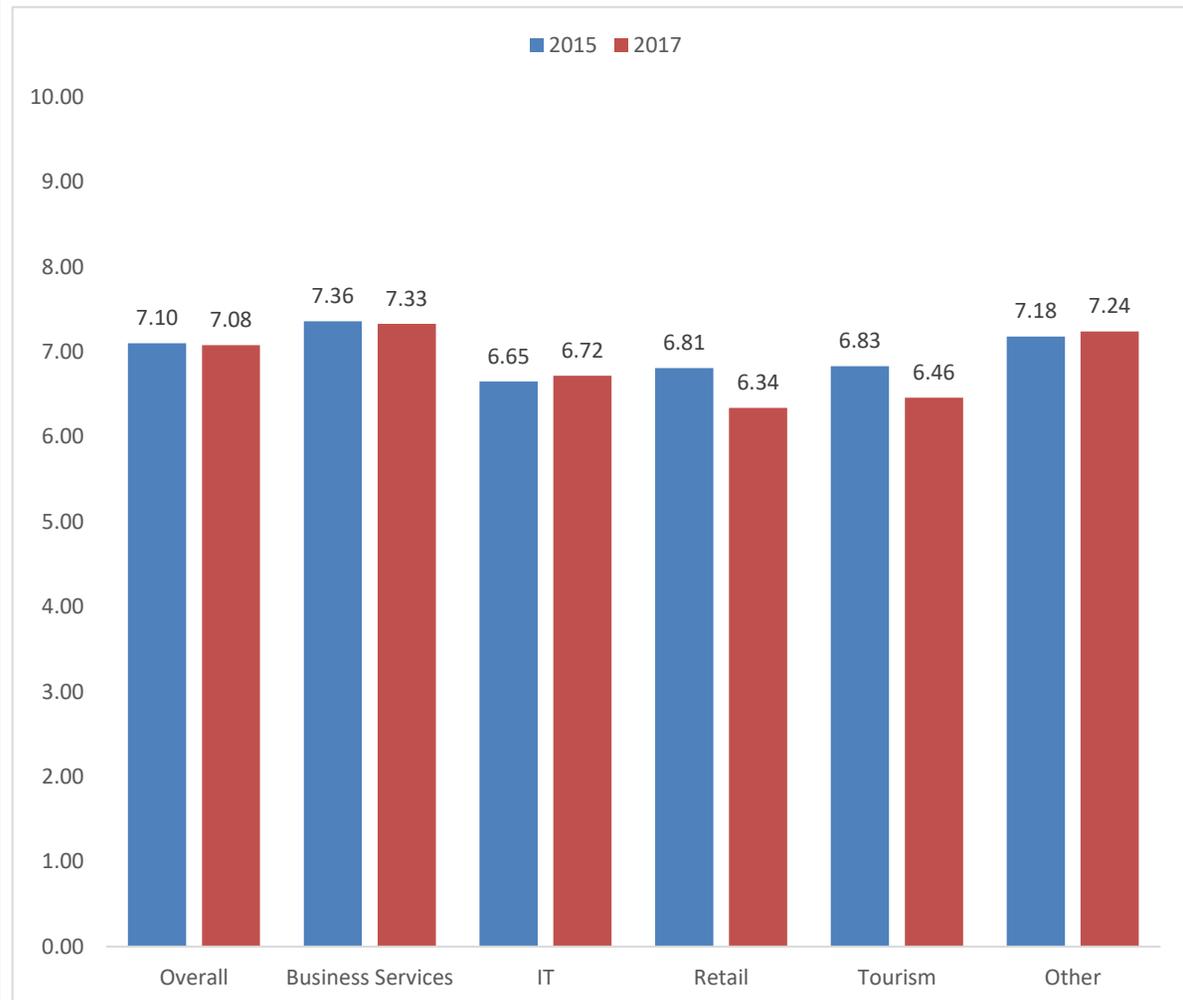
CURRENT ECONOMIC STRENGTH OF BUSINESS

All Business / Year-Over-Year

Overall, 79 percent of businesses state that the economic strength of their business is “somewhat” or “very” strong—the same as in 2015.

While there has been some movement between 2015 and 2017 within sectors, all differences are within the margin of error.

Figure 33: Economic Strength of Business – Year over Year



BC2— Overall, how would you rate the economic strength of your business?

Base: All respondents (2015=917; 2017=994)

Mean is based on an 11-point scale from 0 to 10

By Sector

Business Services and “Other” businesses indicate having the strongest economic strength while Retail and Tourism Businesses feel the weakest. One in five retail businesses indicate the economic strength of their business is “weak”.

By Size

Economic strength increases with business size with small businesses indicating their economic strength is significantly weaker than mid-sized and large businesses.

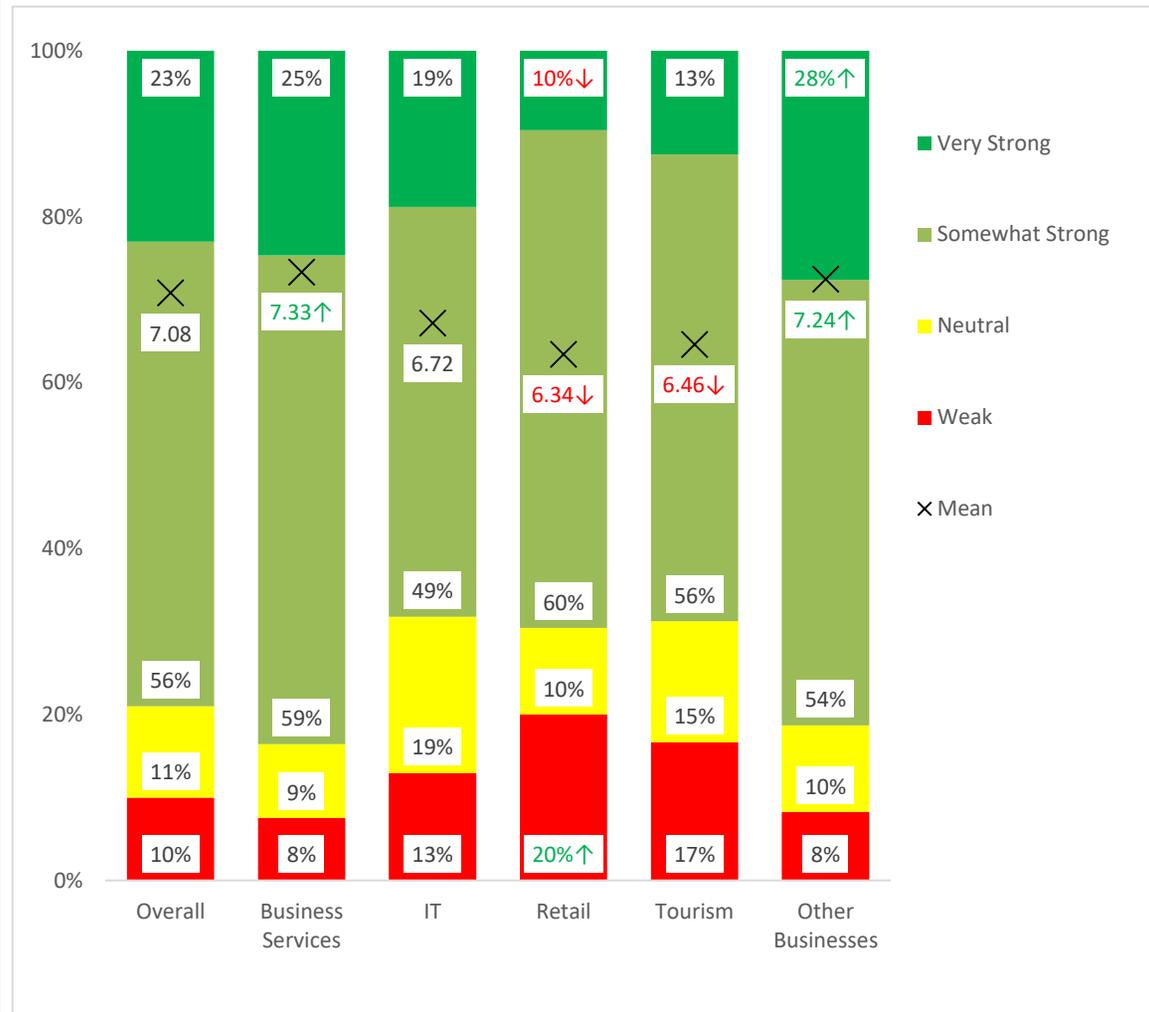
By Age

Businesses founded in 2010 or later indicate a lower economic strength than businesses founded prior to 2010.

By Location

Businesses located in the 116th / Bellefield MEC indicate having the strongest economic strength while those Outside the MEC indicate the lowest economic strength.

Figure 34: Economic Strength of Business –By Sector – 2017 Only



BC2— Overall, how would you rate the economic strength of your business?
 Base: All respondents (n=994); Business Services (n=294); IT (n=85); Retail (n=115); Tourism (n=48), Other (n=452)
 Mean is based on an 11-point scale from 0 to 10

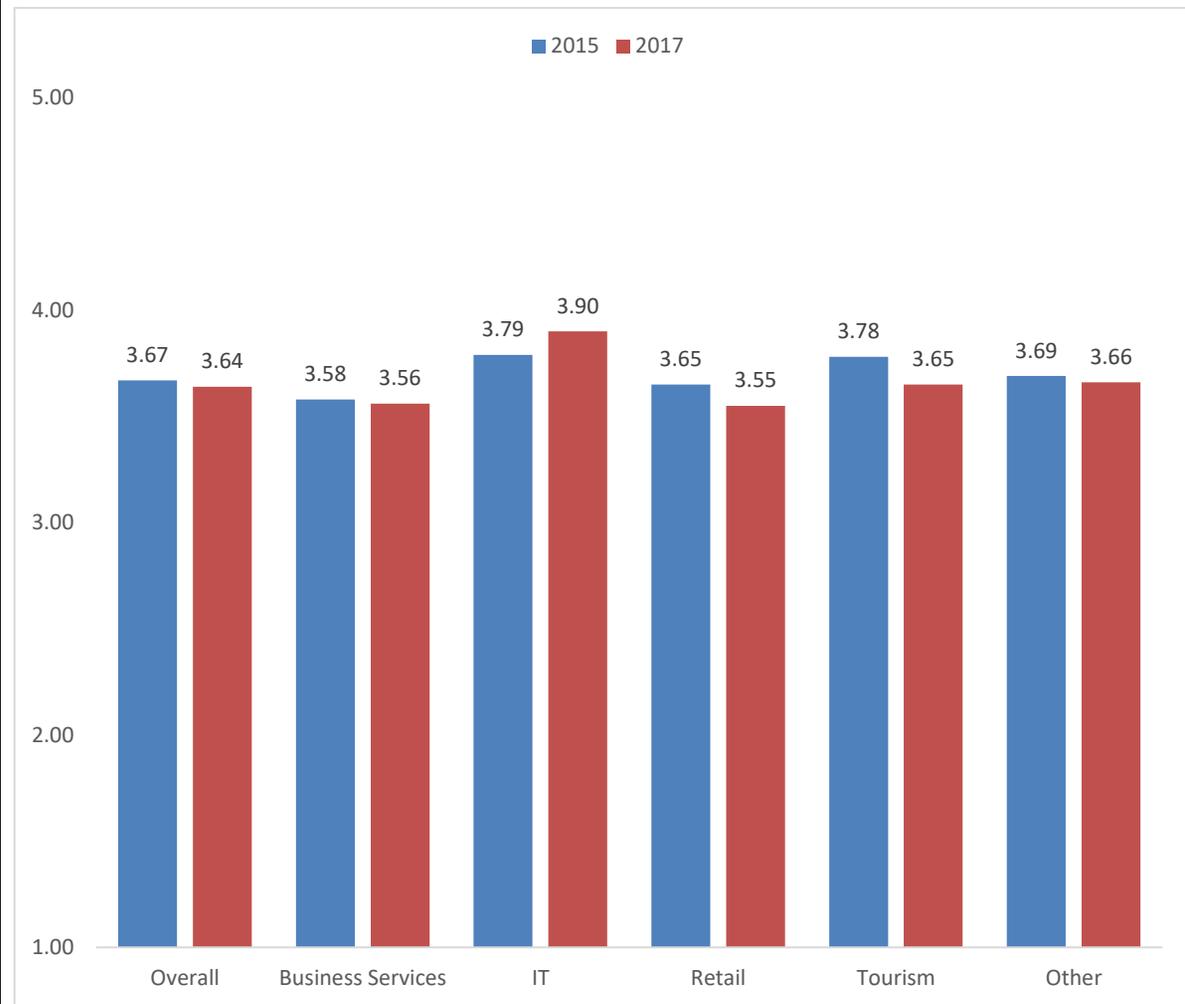
ANTICIPATED ECONOMIC STRENGTH OF BUSINESS

All Business / Year-Over-Year

Sixty-one percent (61%) of businesses indicated they expect the strength of their business to improve over the next three to five years. This is the same as in 2015.

While there has been some movement between 2015 and 2017 within sectors, all differences are within the margin of error.

Figure 35: Anticipated Economic Strength of Business – Year over Year



BC3—Thinking about the next 3 to 5 years, do you feel the economic strength of your business will. . .
 Base: All respondents (2015=917; 2017=994)
 Mean based on a 5-point scale from 1 to 5

By Sector

Businesses in the Information Technology sector are the most likely to anticipate their economic strength will improve over the next 3 to 5 years. Nearly one-in-three anticipate their strength will improve significantly.

By Age

While newer businesses indicate a lower current economic strength, these businesses are significantly more likely to state that their economic strength will improve over the next several years—25 percent feel that their business will improve significantly.

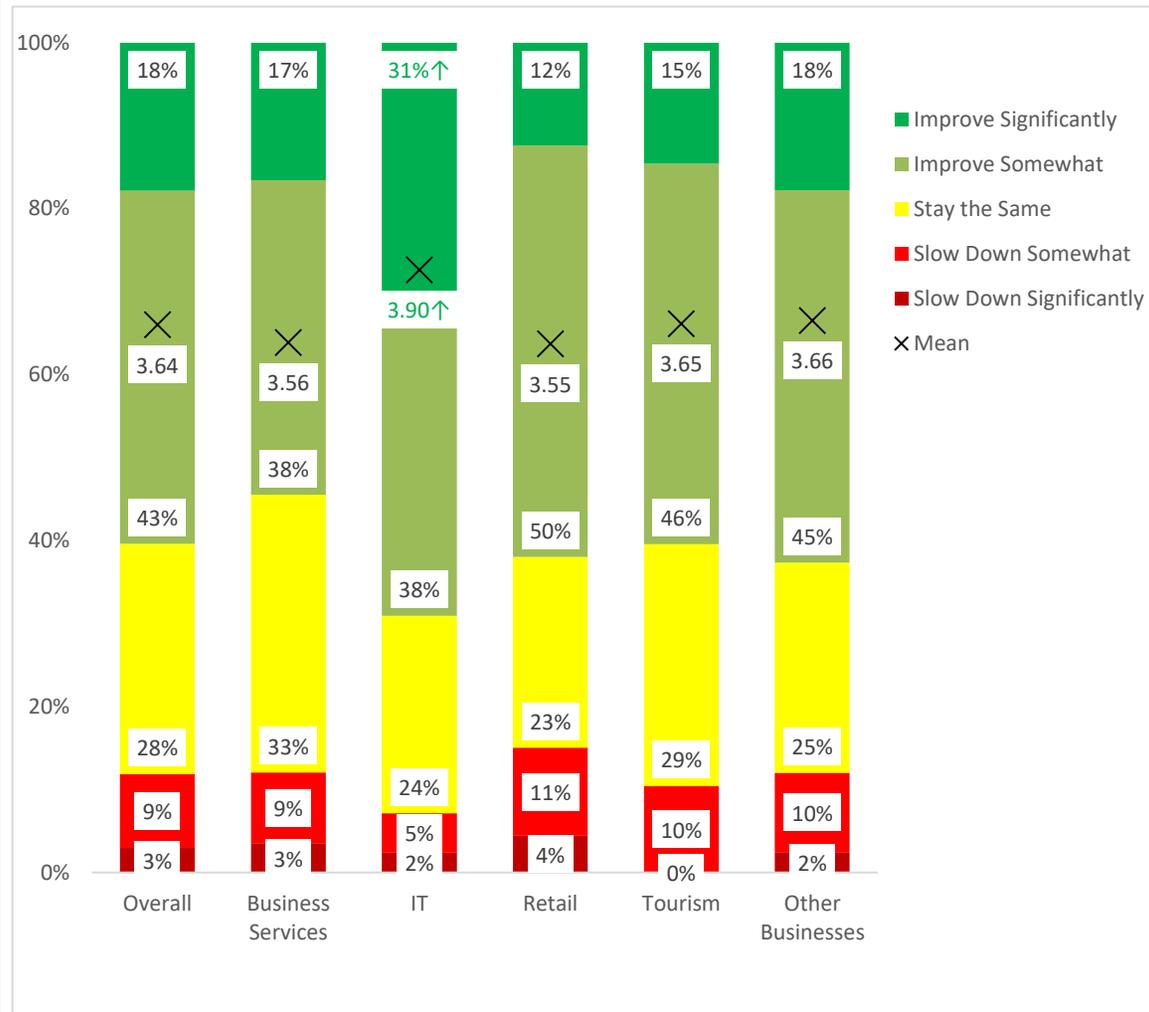
By Size

Small businesses are significantly less confident than mid-sized and large businesses that their economic strength will improve over the next few years—32 percent of small businesses indicate they expect it to remain the same.

By Location

There are no differences on anticipated economic strength based on location of business.

Figure 36: Anticipated Economic Strength of Business – By Sector – 2017 Only



BC3—Thinking about the next 3 to 5 years, do you feel the economic strength of your business will. . .
 Base: All respondents (n=994); Business Services (n=294); IT (n=85); Retail (n=115); Tourism (n=48), Other (n=452)
 Mean based on a 5-point scale from 1 to 5

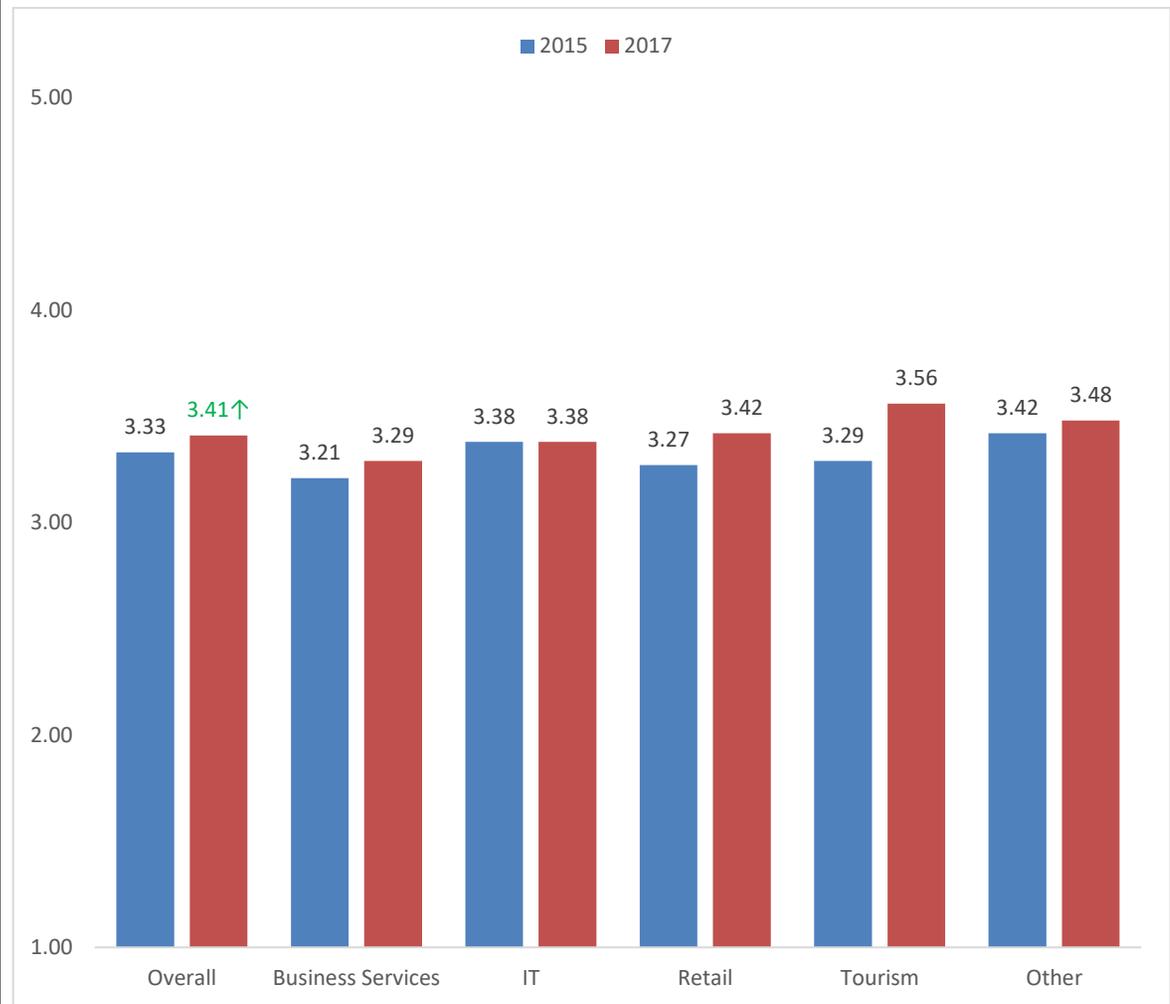
ANTICIPATED CHANGES TO CAPITAL EXPENDITURES

All Business / Year-Over-Year

Half of all businesses do not anticipate much change in their capital expenditures over the next few years. However, more businesses anticipate an increase in capital expenditures rather than a decrease and the overall trend toward increased capital expenditures has increased from what was anticipated in 2015.

While there has been some movement between 2015 and 2017 within sectors, all differences are within the margin of error.

Figure 37: Anticipated Changes to Capital Expenditures – Year over Year



BC4_2—Please indicate below any anticipated changes to capital expenditures in your business over the next 12 months.
 Base: All respondents (2015=917; 2017=994)
 Mean based on a 5-point scale from 1 to 5

By Sector

Businesses in the “Other” sector are the most likely to anticipate increases in capital expenditures—48 percent anticipate increases.

Conversely, those in the Business Services sector are the least likely to anticipate increases. This is due to nearly two-thirds (62%) indicating they anticipate no changes.

By Size

Thirty-four percent (34%) of small businesses anticipate an increase over the next few years compared to 52 percent of mid-sized businesses and 65 percent of large businesses.

By Age

Newer businesses—those founded in 2010 or later—are significantly more likely to anticipate increases in capital expenditures. Half of these businesses anticipate an increase vs. 39 percent of businesses founded prior to 2010.

By Location

Businesses located outside the Major Employment Centers are the least likely to anticipate increases. This is due to a large percentage (59%) indicating they anticipate no changes.

Figure 38: Anticipated Changes to Capital Expenditures – By Sector – 2017 Only



BC4_2—Please indicate below any anticipated changes to capital expenditures in your business over the next 12 months.
 Base: All respondents (n=994); Business Services (n=294); IT (n=85); Retail (n=115); Tourism (n=48), Other (n=452)
 Mean based on a 5-point scale from 1 to 5

GEOGRAPHIC CUSTOMER MARKETS

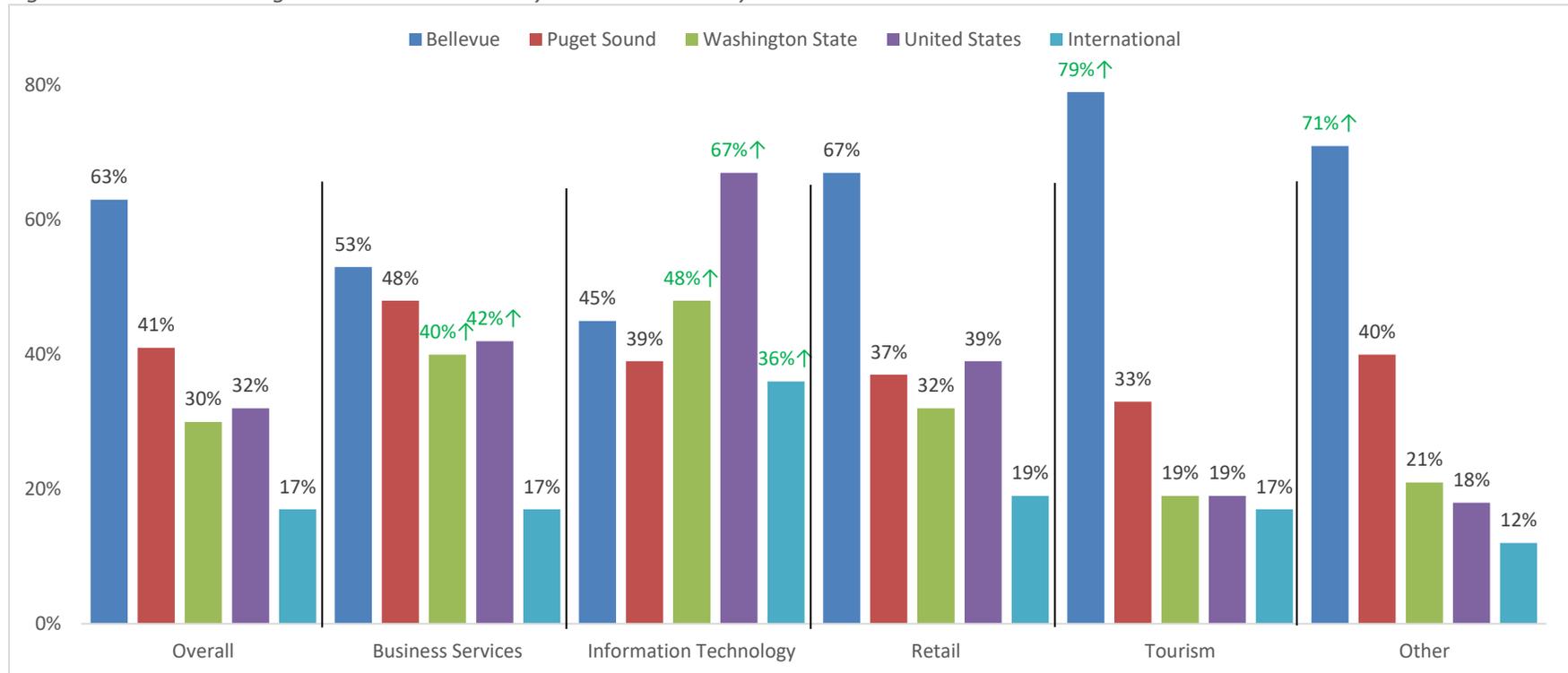
The majority of businesses sell their goods or services locally.

- Businesses in the Business Services and Information Technology sectors are significantly more likely than other businesses to sell their goods and services across Washington State and the rest of the United States.

Only 17 percent of businesses sell their products internationally.

- Among businesses that sell internationally, the markets sold in are: North America (72%), Asia (68%), Australia / Oceania (40%), South America (35%), Africa (21%), and other international markets
- Only 13 percent of businesses that sell internationally claim to have received help for selling their products internationally.

Figure 39: Location Selling Goods and Services – By Sector – 2017 Only



ST9— Where do you sell your goods and services?

Base: All respondents (n=994); Business Services (n=294); IT (n=85); Retail (n=115); Tourism (n=48), Other (n=452)

LOCATION OF SUPPLIERS

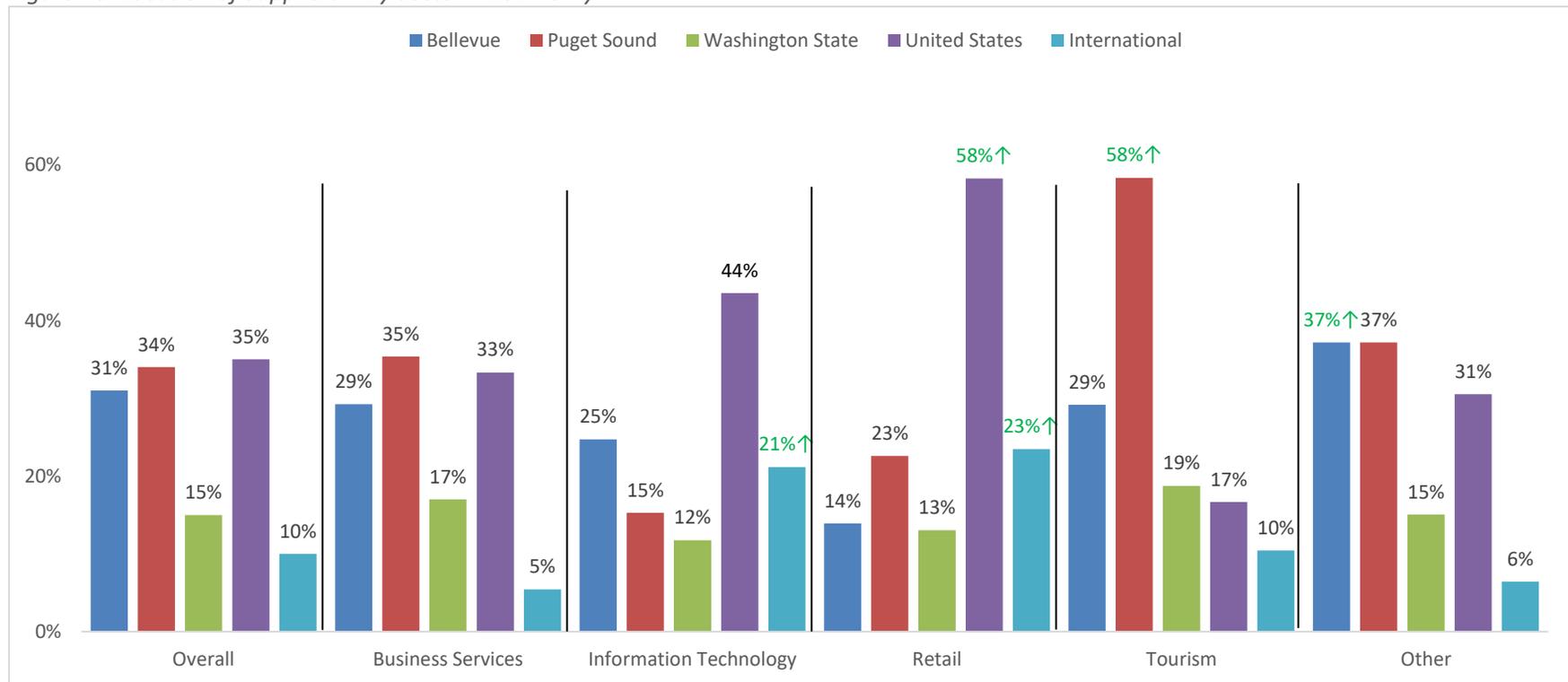
The location of current suppliers is quite varied with businesses being nearly as likely to be supplied nationally, regionally, or by other businesses in Bellevue.

Retail businesses are significantly more likely than businesses in other sectors to be supplied by businesses across the United States,

Tourism businesses are significantly more likely than businesses in other sectors to be supplied by businesses across in the Puget Sound, and

Businesses in the “Other” sector significantly more likely than other businesses to be supplied by businesses in Bellevue.

Figure 40: Location of Suppliers – By Sector – 2017 Only



ST10— Where are the majority of your suppliers located?

Base: All respondents (n=994); Business Services (n=294); IT (n=85); Retail (n=115); Tourism (n=48), Other (n=452)

KEY FINDINGS –EMPLOYEES AND STAFFING

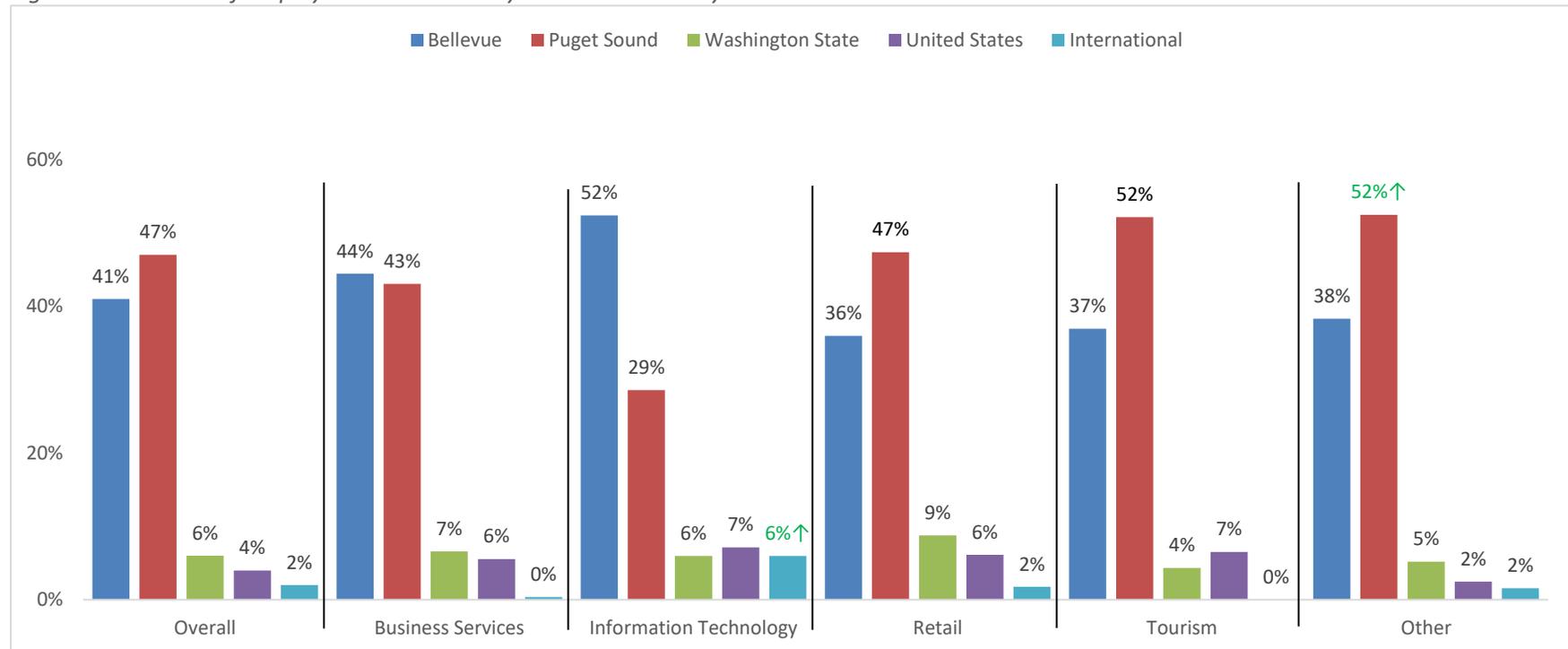
LOCATION OF EMPLOYEE TALENT POOL

The clear majority of the employee talent pool is in Bellevue or elsewhere in the Puget Sound. While Information Technology businesses currently find the majority of their talent in Bellevue or the Puget Sound, they are significantly more likely than other businesses to search internationally for qualified employees.

Retail, Tourism, and Other businesses primarily find their employees across the Puget Sound—significantly more likely than Information Technology businesses.

Small businesses are significantly more likely than mid-sized and large businesses to find employees in Bellevue. Mid-size and large businesses find the majority of their employees across the Puget Sound.

Figure 41: Location of Employee Talent Pool– By Sector – 2017 Only



ST3— Where is your employee talent pool located?

Base: All respondents (n=994); Business Services (n=294); IT (n=85); Retail (n=115); Tourism (n=48), Other (n=452)

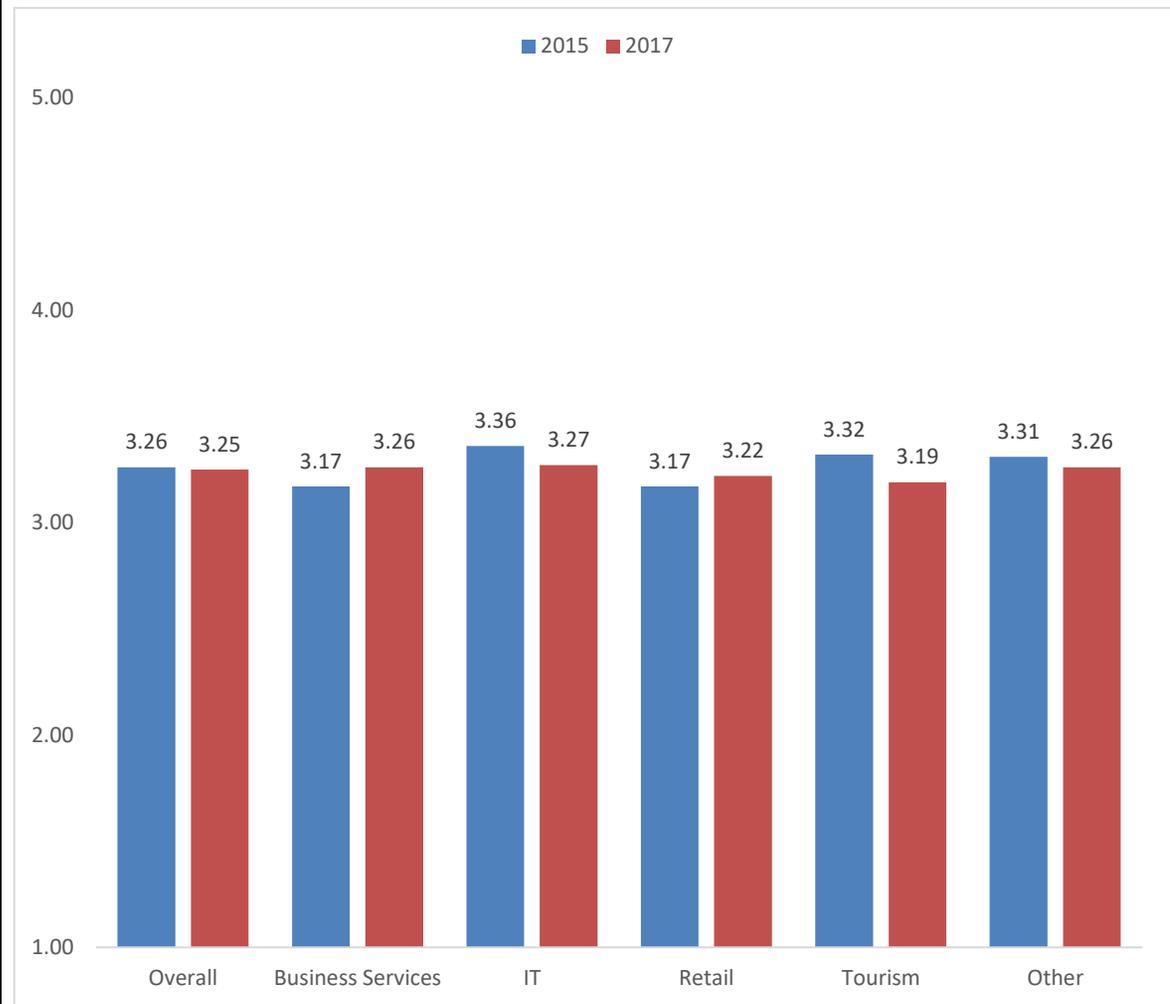
ANTICIPATED CHANGES TO EMPLOYEES

All Business / Year-Over-Year

While nearly one third of businesses anticipate some increase in the number of employees, the majority (59%) do not anticipate any changes over the next 12 months.

This is the same as 2015 overall and within each sector.

Figure 42: Anticipated Changes to Number of Employees – Year over Year



BC4_1—Please indicate below any anticipated changes to the number of employees based in Bellevue in your business over the next 12 months.

Base: All respondents (2015=917; 2017=994)

Mean based on a 5-point scale from 1 to 5

By Sector

There are no differences based on the sector.

By Location

Businesses located in the Eastgate / Factoria (50%) MEC as well as those located downtown (44%) are the most likely to indicate an increase in employees over the next 12 months.

Businesses located outside any of the major employment centers are the least likely to indicate employee expansion—only 19 percent anticipate any increase and 74 percent anticipate no change.

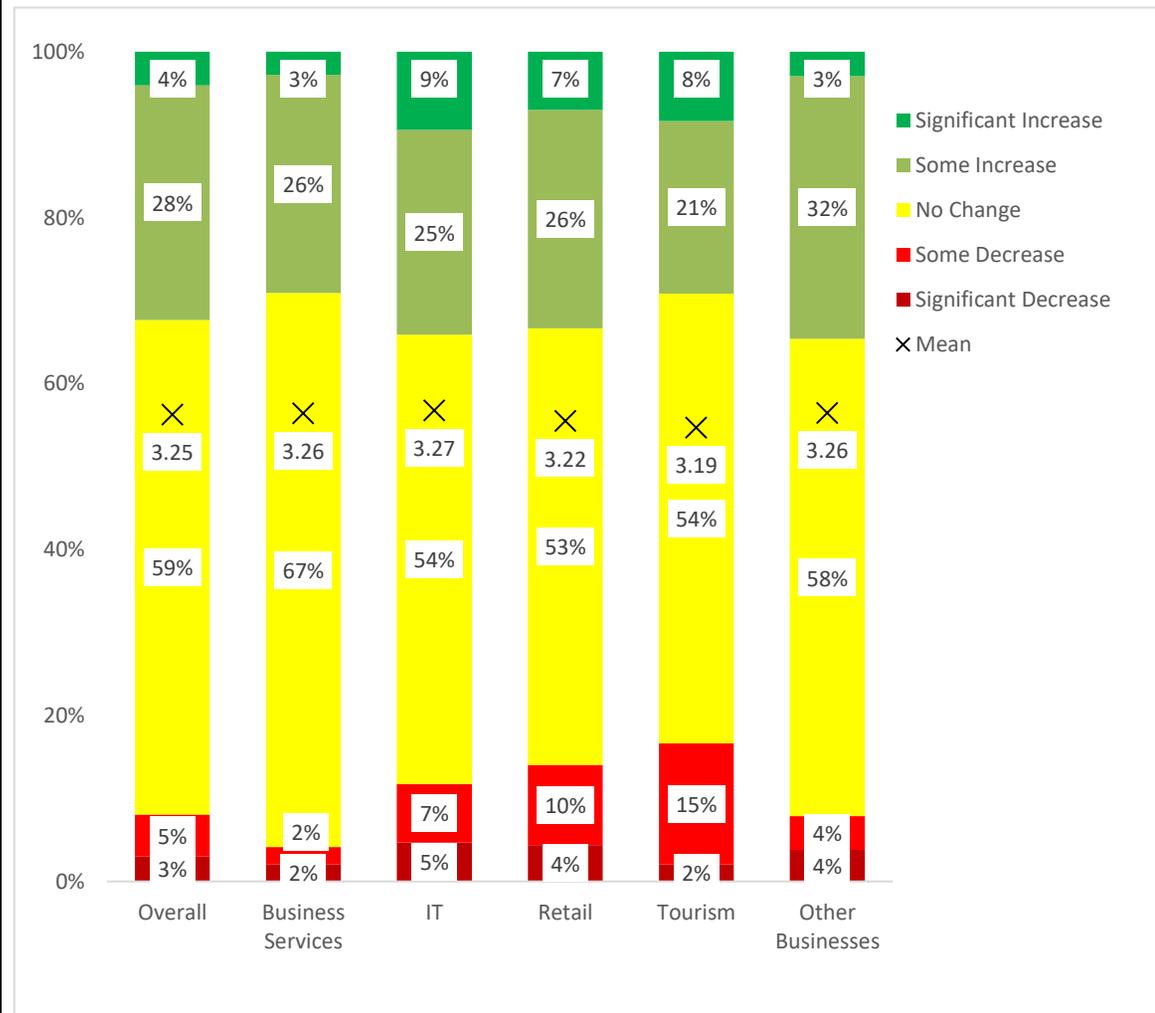
By Size

Nearly half (47%) of large businesses expect an increase in the number of employees. Conversely, one in five (21%) of small businesses anticipate increasing the number of employees.

By Age

There are no differences based on the age of the business.

Figure 43: Anticipated Changes to Number of Employees– By Sector – 2017 Only



BC4_1—Please indicate below any anticipated changes to the number of employees based in Bellevue in your business over the next 12 months.

Base: All respondents (n=994); Business Services (n=294); IT (n=85); Retail (n=115); Tourism (n=48), Other (n=452)

Mean based on a 5-point scale from 1 to 5

Types of Employees to Hire

Of businesses anticipating hiring over the next 12 months,

- Nearly half (45%) intend to hire Professional / Managerial,
- Thirty-eight percent (38%) are looking for Office / Administrative staff, and
- Thirty-six percent (36%) are looking to fill Customer Service / Sales roles.

While the distribution in types of employees looks different from 2015, all the differences are within the margin of error.

By Sector

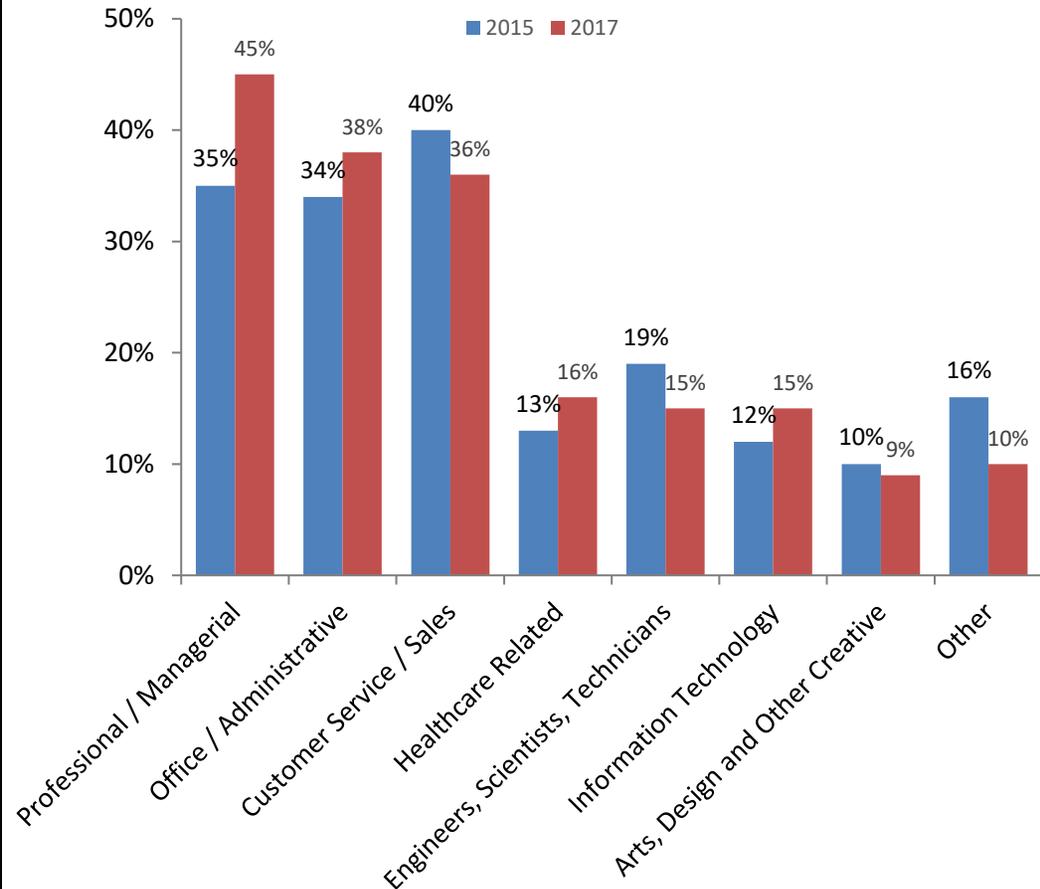
Demand for Professional / Managerial staff is highest among those in the Business Services sector.

Tourism and Retail businesses are significantly more likely to anticipate needing Customer Service / Sales employees.

Demand for Office/Administrative employees is consistent across all sectors.

Demand for Engineer / Scientists / Technicians, Information Technology, and Arts / Design / Creative employees is highest companies in the IT sector.

Figure 44: Anticipated Types of Employees to be Hired – Year over Year



BC5—What type of employees do you intend to hire?
Base: Respondents who anticipate some increase or a significant increase in the number of employees based in Bellevue (2015=291; 2017=319)

ABILITY TO FIND TRAINED / QUALIFIED STAFF

All Businesses

Forty-one percent (41%) of businesses state that they have had difficulty finding trained and/or qualified staff over the past 12 months. This is the same as 2015.

By Sector

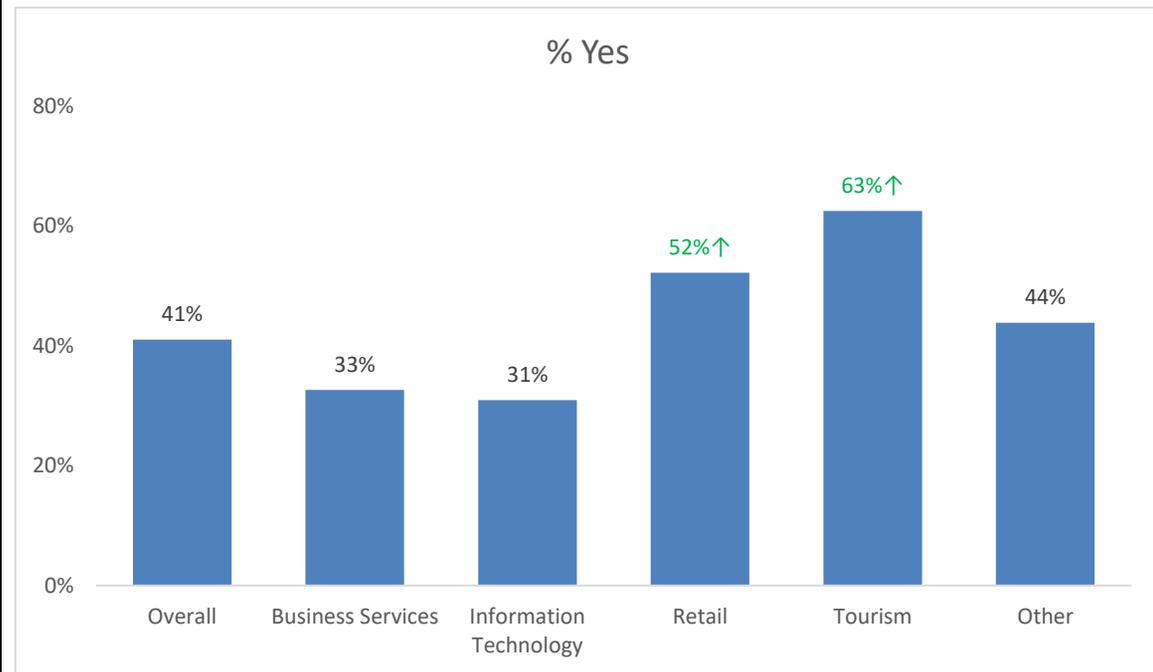
Retail and Tourism indicate having the most difficult time—over half of Retail businesses and 63 percent of Tourism businesses report having difficulty finding trained and qualified staffing.

Conversely, Business Services and IT companies are the least likely to have issues finding qualified staff.

By Size

Companies with six or more employees are significantly more likely than small businesses to indicate they are having difficulty finding / training staff—61% vs. 25% respectively.

Figure 45: Percent of Businesses that have Difficulty Finding Trained and Qualified Staffing – By Sector – 2017 Only



ST7—Have you had difficulty finding trained and/or qualified staff in the past 12 months?

Base: All respondents (n=994); Business Services (n=294); IT (n=85); Retail (n=115); Tourism (n=48), Other (n=452)

[Blank page inserted for pagination purposes.]

KEY FINDINGS—BROADBAND INTERNET

TECHNOLOGY SERVICES SUBSCRIBED TO

Nine in ten businesses have internet access. This is the same as in 2015 and consistent across all sectors.

Figure 46: Technology Services Currently Subscribed To – Year over Year

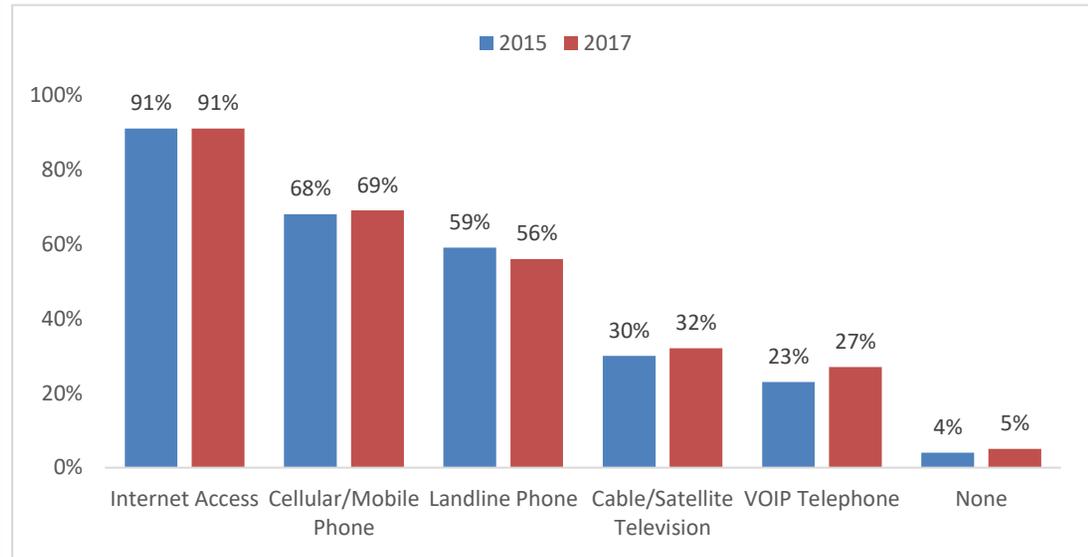
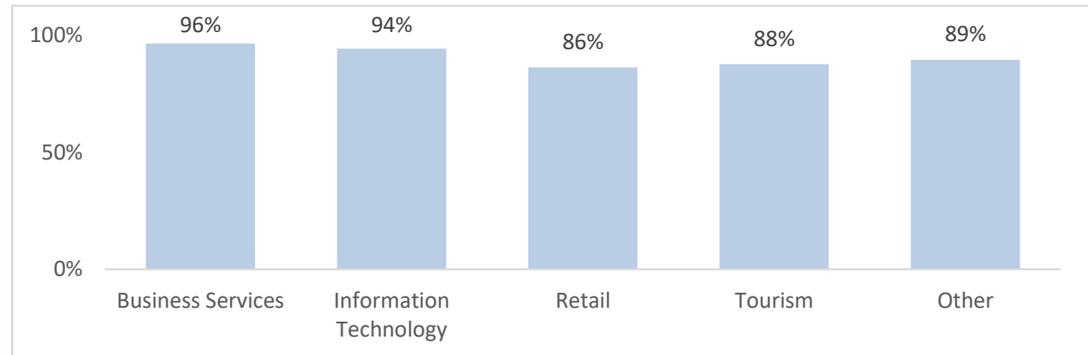


Figure 47: Internet Access by Business Sector – 2017 Only



BB1— Which of the following services does your business currently have?

Base: All respondents (2015=917; 2017=994) Business Services (n=294); IT (n=85); Retail (n=115); Tourism (n=48), Other (n=452)

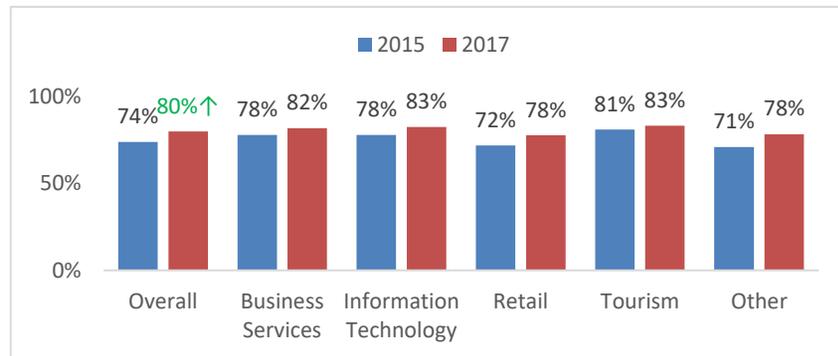
QUALITY OF INTERNET SERVICE

Businesses with internet access were asked two follow-up questions; if their existing internet service meets their current needs and if they felt that their existing internet speed would meet their business needs over the next two to three years.

Four out of five claim that their existing internet service meets their current needs. This is significantly higher than 2015. There are no significant differences across business sectors, location, size, or age of business.

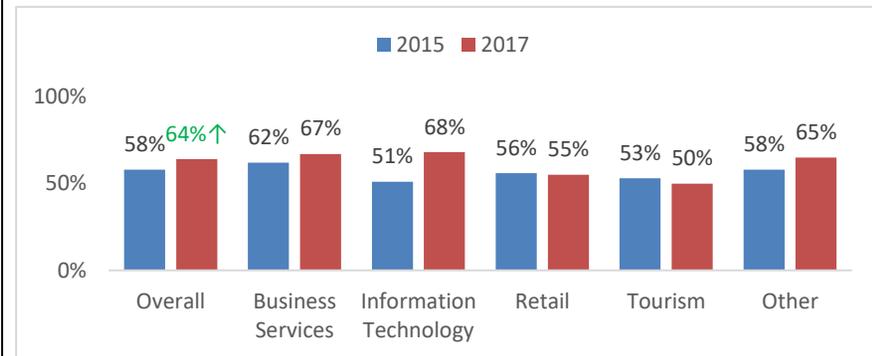
When asked about the next two to three years, 64 percent of businesses state that their existing internet speed will meet their business needs. This is also significantly higher than 2015. There is a difference based on size of the business as businesses with 6 or more employees are less likely to state their internet speed will meet the needs of their business in the next 2 – 3 years.

Figure 48: Adequacy of Current Internet Service – Year over Year



BB2— Does your existing internet speed/bandwidth meet your current needs?
Base: Respondents with Internet Access (2015=834; 2017=905)

Figure 49: Anticipated Adequacy of Future Internet Service – Year over Year



BB3— In the next two to three years, will your existing internet speed meet your business needs?
Base: Rebased upon all respondents who have internet access (2015=834; 2017=905). Respondents who indicated internet did not meet current needs were recoded as “no” for meeting future needs here.

KEY FINDINGS—ADDITIONAL TOPICS

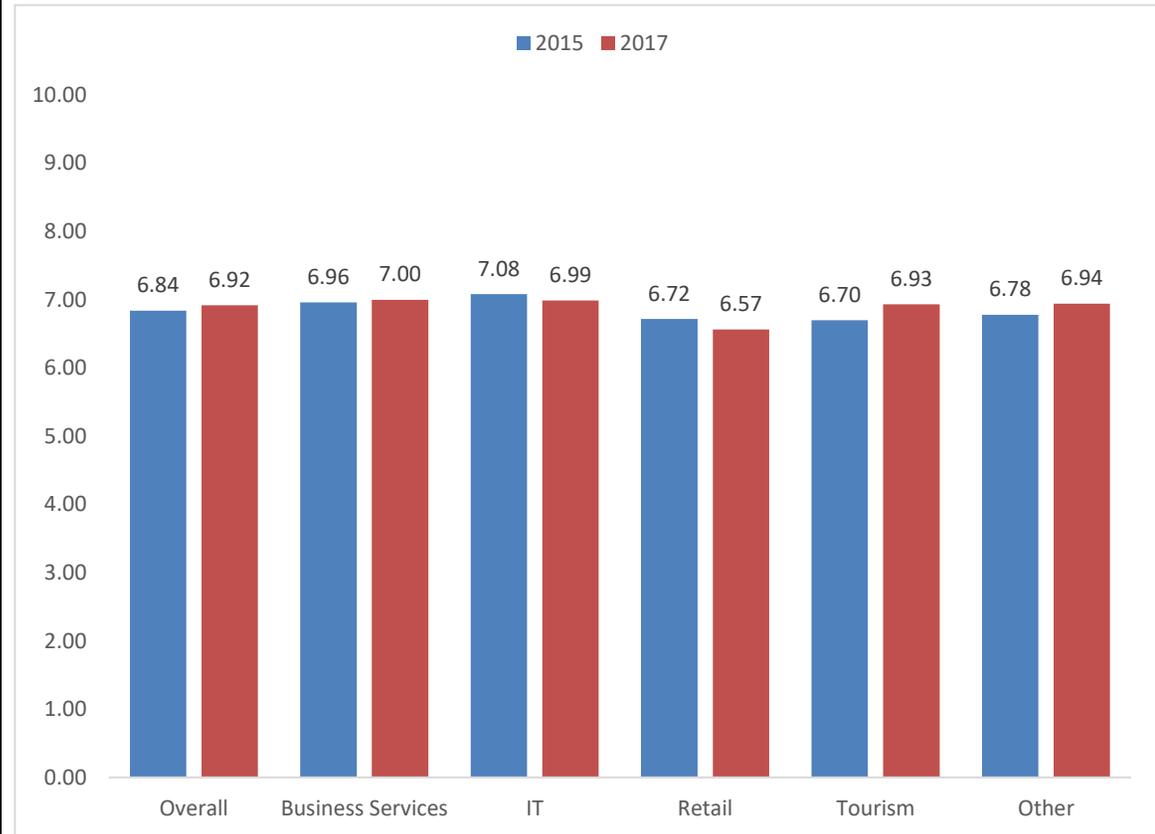
CUSTOMER SERVICE RELATED TO TAXES

All Business / Year-Over-Year

Seventy percent (70%) of businesses are satisfied with the customer service they receive when dealing with their Bellevue Taxes—the same as in 2015.

There are no year over year changes within sectors.

Figure 50: Satisfaction Related to Customer Service Dealing with Bellevue Taxes – Year over Year



CC2— How satisfied are you with the customer service you receive when dealing with your Bellevue business Taxes?
 Base: All respondents (2015=917; 2017=994)

By Sector

There are no differences across business sectors.

By Location

There are no differences based on location of the business.

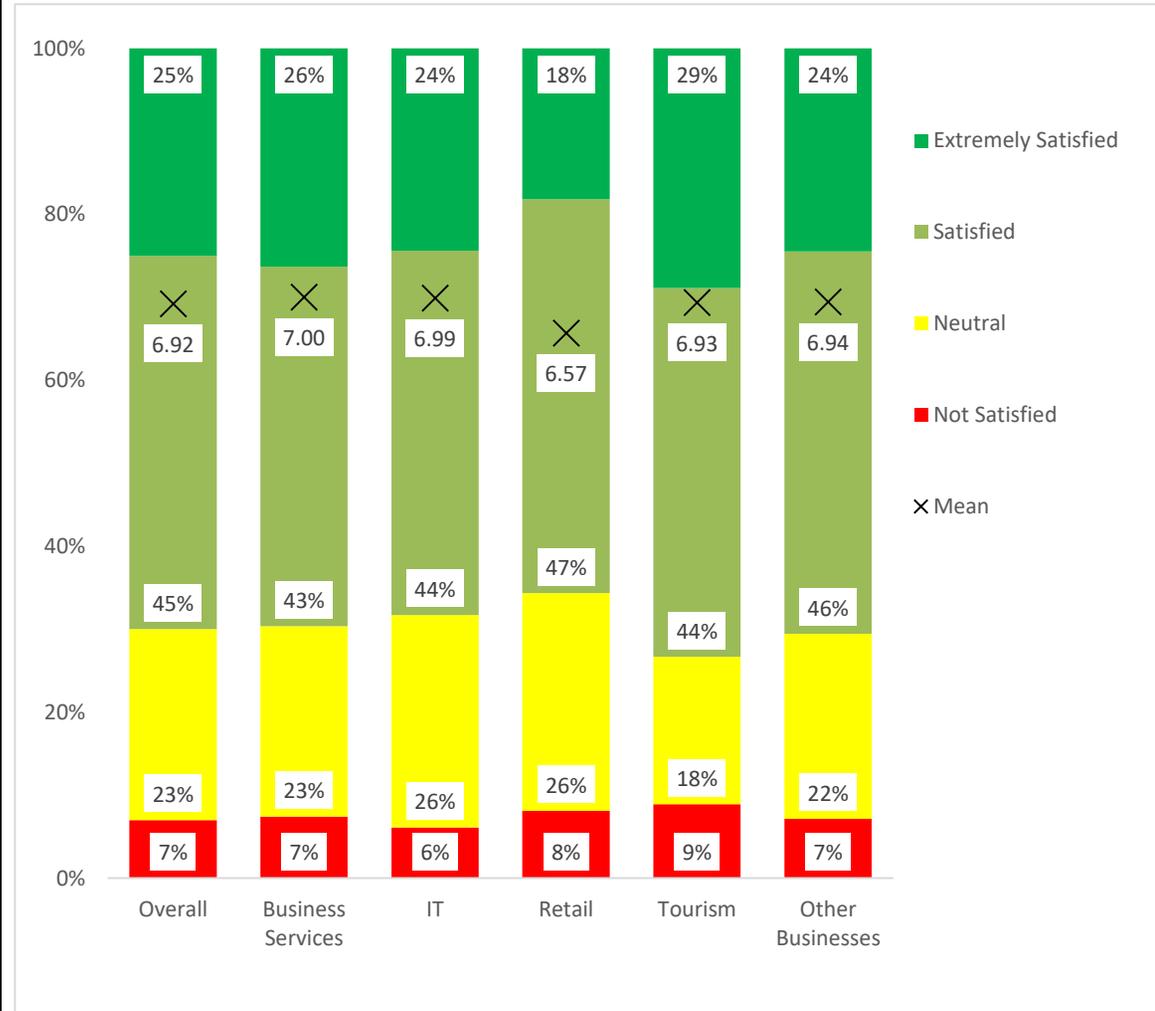
By Size

There are no differences based on the size of the business.

By Age

There are no differences based on age of the business.

Figure 51: Satisfaction Related to Customer Service Dealing with Bellevue Taxes – By Sector – 2017 Only



CC2— How satisfied are you with the customer service you receive when dealing with your Bellevue business Taxes?
Base: All respondents (2015=917; 2017=994) Business Services (n=294); IT (n=85); Retail (n=115); Tourism (n=48), Other (n=452)

INCENTIVES FOR ALTERNATIVE TRANSPORTATION

All Business / Year-Over-Year

In all, 21 percent of businesses offer an incentive to employees for alternative transportation. This is significantly higher than 2015 primarily due to a significant increase in “Other” businesses.

By Sector

Although there has been an increase from 2015, “Other” businesses remain the least likely to offer transportation incentives to their employees.

By Location

Businesses located downtown are the most likely to offer transportation incentives to their employees. Those located in the SR 520 / BelRed MEC are the least likely to do so.

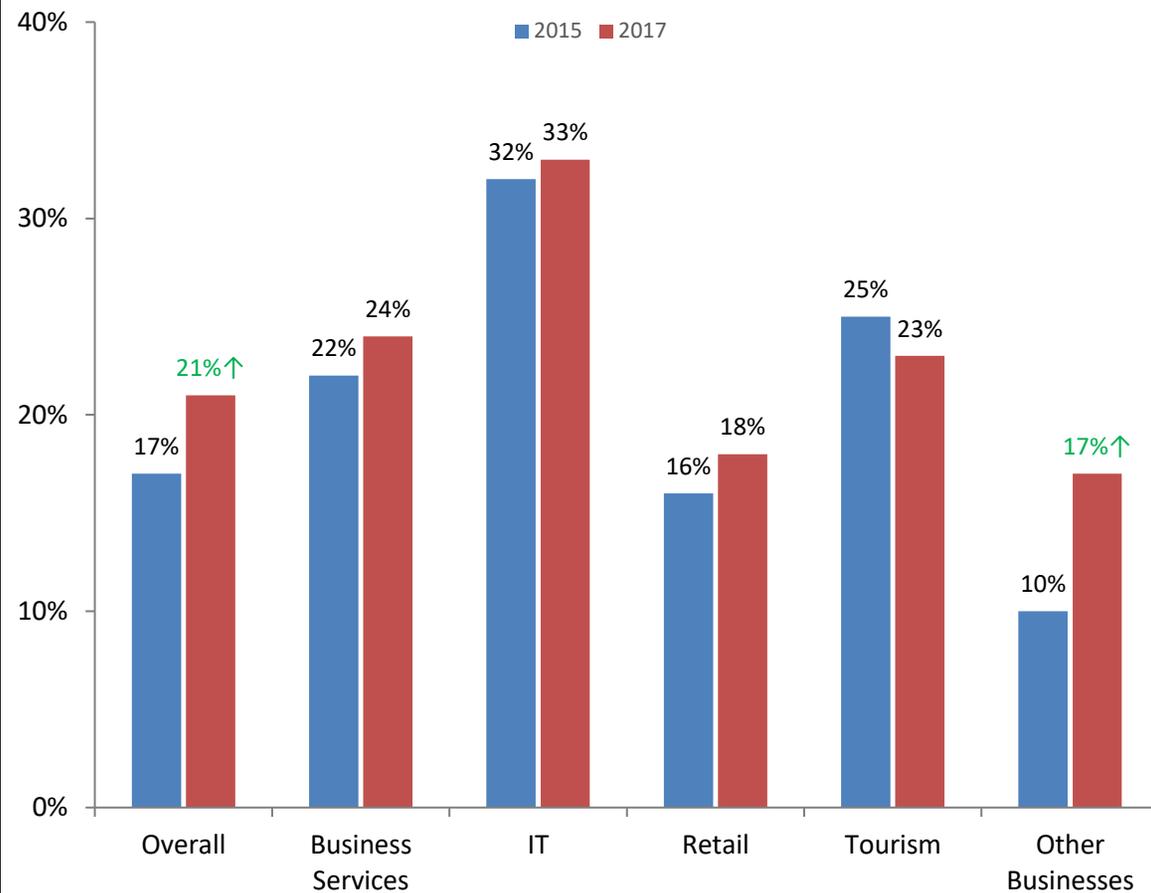
By Size

Large businesses are significantly more likely than small and mid-sized businesses to offer incentives for alternative transportation.

By Age

There are no differences based upon the age of the business.

Figure 52: Incentives for Alternative Transportation – Year over Year



ST1—Does your business offer employees incentives to encourage the use of alternative modes of transportation such as public transit, walking or bicycling?

Base: All respondents (2015=917; 2017=994)

Mean is based on an 11-point scale from 0 to 10

Businesses that do not currently offer transportation incentives were asked to indicate their likelihood of doing so.

All Businesses

In all, the likelihood of businesses offering incentives for alternative transportation is very low—six in ten businesses say they are not at all likely to offer these incentives.

By Sector

There are no significant differences based on sector.

By Location

There are no significant differences based on location.

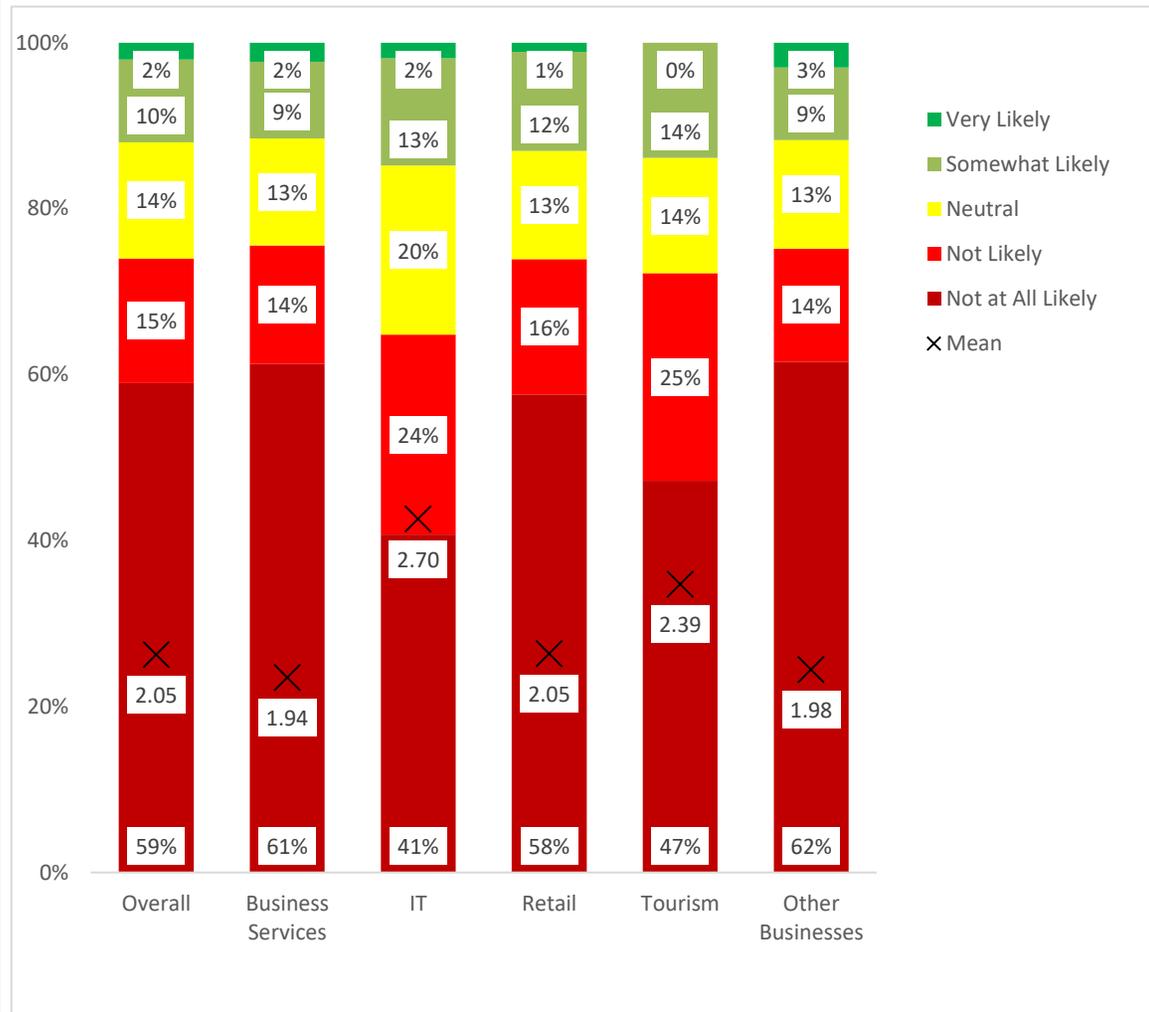
By Size

Large businesses are significantly more likely than small and mid-sized businesses to be likely to offer incentives for alternative transportation.

By Age

While still very low (16%), businesses founded in 2010 or later are significantly more likely to be likely to offer incentives for alternative transportation.

Figure 53: Likelihood of Offering Incentives for Alternative Transportation – By Sector – 2017 Only



ST1— How likely is your business to begin offering employee incentives within the next two years to encourage alternative modes of transportation?

Base: All respondents (2015=917; 2017=994)

Mean is based on an 11-point scale from 0 to 10

APPENDIX I – DEMOGRAPHIC PROFILE OF BUSINESSES

Position Within Company	Owner	64%
	C-Level	9%
	Manager	17%
	Admin/Clerical	7%
	Other	2%
Own vs. Lease Workspace	Own	30%
	Lease	70%
Number of Locations in Bellevue	One	84%
	2 to 5	15%
	6 to 10	1%
	11 or more	<1%
	<i>Mean</i>	1.3
Number of Employees	One	24%
	2 to 5	32%
	6 to 10	15%
	11 to 24	14%
	25 to 49	7%
	50 to 99	4%
	100 or more	4%
	<i>Mean</i>	37.1
Year Established	Prior to 1980	9%
	1980s	8%
	1990s	15%
	2000s	24%
	2010 or later	44%

[Blank page inserted for pagination purposes.]

APPENDIX II—RESPONSE MODE BY SECTOR

Table 2: Response Mode by Sector

Business Services			
Mode of Contact	Phone	Web	Total
Snail mail only	0	15	15
Snail mail / Email follow-up	0	21	21
Snail mail / Phone call follow-up	0	17	17
Email / Phone call follow-up	0	180	180
Phone call only	61	0	61
Total for Business Services	61	233	294

Information Technology			
Mode of Contact	Phone	Web	Total
Snail mail only	0	4	4
Snail mail / Email follow-up	0	11	11
Snail mail / Phone call follow-up	0	5	5
Email / Phone call follow-up	0	58	58
Phone call only	7	0	7
total for Information Technology	7	78	85

Retail			
Mode of Contact	Phone	Web	Total
Snail mail only	0	5	5
Snail mail / Email follow-up	0	10	10
Snail mail / Phone call follow-up	0	6	6
Email / Phone call follow-up	0	64	64
Phone call only	30	0	30
Total for Retail	30	85	115

Tourism			
Mode of Contact	Phone	Web	Total
Snail mail only	0	1	1
Snail mail / Email follow-up	0	2	2
Snail mail / Phone call follow-up	0	1	1
Email / Phone call follow-up	0	37	37
Phone call only	7	0	7
Total for Tourism	7	41	48

Other			
Mode of Contact	Phone	Web	Total
Snail mail only	0	16	16
Snail mail / Email follow-up	0	35	35
Snail mail / Phone call follow-up	0	19	19
Email only	0	2	2
Email / Phone call follow-up	1	287	288
Phone call only	92	0	92
Total for "Other"	93	359	452

Grand Total			
Mode of Contact	Phone	Web	Total
Snail mail only	0	41	41
Snail mail / Email follow-up	0	79	79
Snail mail / Phone call follow-up	0	48	48
Email only	0	2	2
Email / Phone call follow-up	1	626	627
Phone call only	197	0	197
Grand Total	198	796	994

APPENDIX III—BUSINESS GEOGRAPHIES

Prior to data collection, businesses were assigned to one of five Major Employment Centers, plus an additional designation for “outside the MEC” which accounts for businesses not located within the boundaries of the Major Employment Centers. The survey consisted of a census of all businesses so all MEC’s were sampled proportionate to their distribution throughout Bellevue. While most MECs had relatively large sample sizes, only 13 businesses responded from Crossroad—primarily due to the fact that relatively few businesses are located within that specific MEC. The table below provides sample sizes, distribution and the margin of error for each MEC.

Table 3: Distribution of Completed Surveys – by Major Employment Center

	Completed Surveys				In Sample Universe		% of Businesses Interviewed	Margin of Error at 95% confidence
	Phone	Web	Total		Total			
116th / Bellefield	14	61	27	8%	817	6%	3%	18.6%
Crossroads	5	8	13	1%	279	2%	5%	26.6%
Downtown	38	143	181	18%	2,696	20%	7%	7.0%
Eastgate/Factoria	24	45	69	7%	984	7%	7%	11.4%
SR 520 / BelRed	72	206	278	28%	2,999	23%	9%	5.6%
Outside MEC	45	333	378	38%	5,716	42%	7%	4.6%
Total	198	796	994	100%	13,491	100%	7%	3.0%

[Blank page inserted for pagination purposes.]

APPENDIX IV—AGE AND SIZE OF BUSINESS

The tables below provide the number of completed surveys and the margin of error for the age and size of the business as reported on throughout this document. These statistics are self-reported. As such, not all respondents provided answers so totals may not sum to the total 994 completed interviews.

Also note that the margin of error provided here is a maximum estimated margin of error. There is a finite population correction that would typically reduce the margin of error, however, because the population is not known for each of the segments below the margin of error is based on the total number of businesses in the list provided by the City of Bellevue (13,491).

Table 4: Distribution of Completed Surveys – by Business Age (decade founded)

	Completed Surveys				Margin of Error at 95% confidence
	Phone	Web	Total		
Founded prior to 1980	36	47	83	9%	10.7%
Founded in the 1980's	38	43	81	8%	10.9%
Founded in the 1990's	47	95	142	15%	8.2%
Founded in the 2000's	38	198	236	24%	6.3%
Founded in 2010 or later	18	409	427	44%	4.7%
Total	177	792	969	100%	3.0%

Table 5: Distribution of Completed Surveys – by Size of Business

	Completed Surveys				Margin of Error at 95% confidence
	Phone	Web	Total		
1 – 5 Employees	72	467	539	56%	4.1%
6 – 49 Employees	97	253	350	36%	5.2%
50 Employees or More	17	59	76	8%	11.2%
Total	186	776	965	100%	3.0%

[Blank page inserted for pagination purposes.]

APPENDIX V—VERBATIM TEXT

Open Ended Responses to Open1: What is the single most important business-related issue in Bellevue

Business Cluster from sample												
	Overall (n=994)		Business Services (n=294)		Information Technology (n=85)		Retail (n=115)		Tourism (n=48)		Other (n=452)	
Traffic	258	30%	83	34%	18	26%	28	28%	11	25%	118	29%
Taxes	102	12%	36	15%	9	13%	13	13%	5	11%	39	10%
Affordability of real estate	93	11%	23	9%	9	13%	7	7%	4	9%	50	12%
Parking	82	10%	21	9%	4	6%	13	13%	5	11%	39	10%
Nothing	58	7%	13	5%	6	9%	7	7%	2	5%	30	7%
Growth and zoning issues	54	6%	16	6%	5	7%	7	7%	4	9%	22	5%
Government regulations	52	6%	9	4%	5	7%	9	9%	4	9%	25	6%
Transpiration	52	6%	16	6%	3	4%	2	2%	2	5%	29	7%
Support for small businesses	32	4%	11	4%	5	7%	4	4%	1	2%	11	3%
Lack of public transportation	26	3%	12	5%	4	6%	1	1%	2	5%	7	2%
Construction impacting my business	20	2%	4	2%	0	0%	2	2%	3	7%	11	3%
Infrastructure building and maintenance	18	2%	9	4%	0	0%	3	3%	0	0%	6	1%
Safety	18	2%	1	0%	0	0%	1	1%	2	5%	14	3%
Labor and wages	17	2%	4	2%	1	1%	0	0%	4	9%	8	2%
Other	111	13%	28	11%	11	16%	16	16%	7	16%	49	12%

Most Important Business-Related Issue



Business Services	Most Important Business-Related Issue
	Updated and consistent Business news for networking and easy client access.
	Taxes are too high and the value for the dollars paid on out "behalf" are too low. Government would be bankrupt if they had to compete like businesses do.
	A great alternative to Seattle!
	A Pro-Business environment
	ability to get around the city regarding the traffic
	Abuse of small business and a complete and total ignorance of non-American cultures and practices.
	Access to the business
	Accessibility for customers and clients.
	Affordable rent space for small businesses. Expedia and Microsoft can buy on volume, a 3-person team cannot.
	Affordable space for businesses and affordable housing for employees.
	Answering my questions. I work online with clients so don't need many services from COB at all
	Assess ability
	Attracting and growing business interests while balancing its ability to remain an intimate, welcoming city.
	B&O taxes
	Bellevue City Tax. It makes it difficult for small business to thrive. Also, there is constant construction on 405 which makes the commute difficult for most employees.
	Bellevue does not want small businesses. It is evident.
	better transportation systems; need more options
	building department being responsive to needs for growth and obstructing builders when they ask for current information
	Bureaucracy can be unwieldy and expensive
	Can't think of anything now.
	cleanliness and experience of safety for customers
	Community diversity
	congestion and high cost of rent
	continue to encourage future growing companies
	Continue to modernize the traffic; I take the B line to work and that was a significant improvement. Single rail should also help and I'm in favor.
	controlled rent prices for business and personal
	Cost of housing
	COST OF LIVING IS RISING TOO HIGH
	Cost of rent in Bellevue and dealing with traffic through 405 corridor.



cost to do business
Create a tax structure that encourages businesses to locate in the city
crowding
demonstrating diversity in city hiring
Development planning. I think as they continue to develop, I think there needs to be more planning so this is done in an intelligent manor.
diversity
Don't know. I don't have any issues.
Ease of access. Keep traffic flow moving.
Ease of commuting. The traffic.
Ease of online use
easy to operate
Efficient.
Exceedingly high property tax due to extraordinarily high over-valuations. DON'T try to say that taxes have not gone up when I pay six times more taxes than 19 years ago. TERRIBLE traffic. Yet the city's publications tout that they don't need to improve the road capacity because people will find other means of transportation. YET the city is adding 80,000 more dwelling units. Suffice to say that I just do not go to the mall any longer. Twenty years ago, I went twice a week. It is a total bottleneck to travel 5 miles. Is that really what you want as a city? Our current plans are to move out of King county. We have NO customers in the state of Washington by design. We quit retail and consulting services. Now only wholesale outside of the state. No inventory, no storage, nothing in the state of Washington. Greedy, arrogant, narcissistic bureaucrats
Expansion
Extremely slow handling of permits, licenses, etc. - causing costly delays for businesses
For me as a sole proprietor working mostly from my home, it's traffic. That's why I DO work from my house. I cannot fathom dealing with a commute even a few times a week
For me it's engineering consulting work. We look for the City of Bellevue to give us work from time to time.
getting in and out of the city
GREAT TO SUCCESS
Growing population and infrastructure
growth
Growth and diversity challenges
Growth management
Growth. More opportunities.
High fees
High property taxes
High taxes. It makes it difficult to maneuver and pass on to the client. They have the option to go online and not pay taxes at all.

Housing prices
How can the city best support and stimulate new and young businesses
How can we encourage small businesses to thrive vs. becoming a city of big box or chain businesses
I am concerned that businesses will be perceived by some as the cause of the transportation and other issues affecting Bellevue as it grows, and those people will see business as an easy target to pay higher taxes.
I am not sure.
I can't think of one.
I do not see any business problem related in Bellevue
I don't do essay questions.
I don't see any real value at all
I don't have an opinion.
I have a small business and usually owe \$50-\$70 a quarter in taxes. I burn up that much value in my own time just to file my city of Bellevue tax. Wouldn't it be more efficient to just let me pay once a year? I'd gladly prepay \$300 just to avoid the hassle of the quarterly tax filings.
I think issues related to business in Bellevue is outside Bellevue's control. State and Federal business policy will out weight Bellevue business policy.
I think it is extremely difficult to get building permits on a timely basis.
I think it is just the traffic. Hard to get around
I think of the cost of doing business in Bellevue is the single most important issue in Bellevue.
I think the availability of information on the website.
I think traffic ingress and egress is a growing issue and while I realize this is not strictly within the control of the City of Bellevue, I believe it is something that we need to address across the Puget Sound Region. I have lost valuable employees because the commute from Everett or West Seattle has become significantly worse. I have other employees who currently work reduced or flexible schedules so they can commute during off periods - because I don't want to lose them.
I think traffic. It is getting worse not better.
I'm concerned about the road construction issues for my clients getting to my business.
Imbalanced taxation that greatly favors large businesses
Increased real estate costs/rents driving smaller businesses and services out, or causing prices to be raised that can't compete. Bricks and mortar having trouble competing with internet-based retail. Dominance of large chains that have deeper pockets.
Increasing traffic growth and congestion.
Infrastructure
infrastructure - roads are pretty bad and extremely congested making it hard to travel in the city
Infrastructure and service support for startups and small business - there is nothing - no outreach, no free connectivity, nothing
It isn't Seattle. Seattle wants to shove a far-left political ideology down everyone's throat, which is choking small businesses. Bellevue has a more level-headed view of what is needed.

Keep investing in streets and moving traffic.
Keep traffic under control so customers can reach businesses, keep parking free.
Keeping Bellevue less regulated than Seattle in terms of employment/wage ordinances to drive business from Seattle to Bellevue.
Keeping costs manageable for the small (and very small) business owners, especially those in the start-up phase of the business.
Keeping taxes on businesses as low as possible.
Keeping the city clean & free of homeless like Seattle has!
Lack of affordable housing
Lack of affordable housing for employees of businesses
Lack of affordable places to set up a business, other than in one's home.
Lack of public parking
land prices and availability
Leaving room for innovators. Bellevue appears to favor established, name companies with high status.
light rail
Location
low taxes
lower tax
Making it more business friendly to attract young start-ups, in addition to large businesses. Not many resources to attract younger businesses. Younger talent wants to be on the Seattle side due to walkability/commutability/quality of life. Bellevue still appears "too sterile" and unappealing to attract younger talent.
Minimum wage increases are hurting businesses.
mobility
MONTHLY RENT FEE INCREASE: Bellevue Government needs to stipulate landlords and real estate developers NOT to increase monthly rent fee and to powerfully enforce them to lower monthly rent fee. Otherwise, small businesses, business development status companies, and small individual retail shops such selling clothes, small, and interesting items to attract specifically ladies and girls cannot run business in Bellevue. And only big corporations such as Amazon and Microsoft can do the business in Bellevue and the strength and attractive points making Bellevue as a Bellevue will be gone and Bellevue will become just Corporate Corporate style of city like recent other America major cities have such problems. Bellevue government needs to take prompt actions and regulate Landlords, real estate developers and office building owners and management companies NOT to raise monthly office rent fee. Also Bellevue government needs to create special locations and areas which mandate landlords, real estate developers, and office building owners and managers to provide much lower monthly office and retail rent spaces with clean, safe, and comfortable for small businesses, business development status companies, and such above small retail shops to run their business reasonably so that Bellevue can dramatically increase the qualities and level of attracting people living and working here and visiting here in Bellevue.
more affordable space for small business
More free parking
My business does not receive any services from the city but pay the same amount as companies that require high level of service from the city.

N/a
N/A
n/a. I have a home office so can't really provide input.
not sure
Nothing comes to mind
Over growth. The rail system. Lack of foresight on traffic issues. negative impact in community
Overhead expenses are already higher to operate in the city of Bellevue. Even paid wages are higher. The additional business tax has zero value to the company. We are already paying more to bring consumers to the area so what in the world does the extra tax do for a company? The answer is nothing.
parking
Parking
Parking and transportation. Getting people around the city and getting a place to park to go into a business.
parking, downtown traffic
Parking.
Parking. It is getting so crowded it is hard to find parking.
Parking. Making sure there is enough room.
Parking/traffic
Permitting and codes make it hard to maintain businesses in Bellevue. If you want to make your business look better, upgrading to meet all the latest rules can make it unaffordable. So, you are left with a decaying city.
Poor infrastructure so that driving accessibility is so limited it is hard to get anywhere in a timely manner.
Poor transportation planning. Poor traffic management.
Property prices are too high, so cause operation cost higher.
Providing positive commercial environment.
Public transit
Rapid Growth
Real estate.
Real Estate. The growth of real estate.
Regulations. The sheer number of regulations that can be applied to your business.
Rent and lease prices
Rent prices. Affordability for smaller businesses to afford to be able to stay with continued growth
Rents
Roads/transportation

Sales tax
Saving and providing support for small independent businesses and not just catering to the Kemper Freeman and Kevin Wallace interests.
Simplify business permit application process
Speaking specifically of the downtown core, I think the rapidly increasing traffic and congestion are major issues. Employees and customers will avoid the area if it gets much worse. The city council should stick to the current building codes around heights and densities to keep congestion within marginally manageable limits. This also becomes a trust issue - not being able trust and "take our eye off the council" for fear that they will change the rules (about anything) without strong oversight.
Specifically, here for us is accesses in parking. For our area, it is not easy to get to the parking and there is a lot of construction. Not necessarily a bad thing.
Stability
Streamlining the permitting process
streets
Support for new business owners (e.g. taxes to file, registration, tax advice).
support for small businesses
tax payments
Tax rate
Tax, Services, Traffic
taxes
Taxes
Taxes in Bellevue as well as other Washington locations are high compared to other states and more complex filings than are needed.
Taxes too high
Taxes. Property taxes are becoming so high it is becoming more difficult to operate here.
The biggest challenge the city has is traffic. But I think that everyone in the city that affects business in Bellevue are quick, accurate and fair.
The building permitting process needs improvement.
The business tax system. The taxes you pay verses the services you receive.
The flat tax rate, regardless of your type of business or MARGINS is not fair. If I make 5% margin, for example, on \$1,000,000 in sales why should I pay the same rate as someone whose business allows them a 50% margin?
The high level of traffic.
The large increase in population and cultural change occurring.
The taxes I think the taxes equal to what you would have to pay at in place.
The traffic is awful. Very congested.
There is not enough parking for visitors to our area.

Too much congestion, too many dense living areas, no parking, overcrowded roads, escalating rent, all indicative of a bubble - I am looking to relocate out of Bellevue

traffic

Traffic

Traffic and access to the work place.

Traffic and accessibility. Clients pick the times they come based on traffic. It's a common theme. We hear a lot "can't come over the bridge right now" and "I missed my window". This has nothing to do with business hours, but the small windows in the day when they can reasonably get here and out. It's a serious issue and has a real impact on revenue potential. The second is business lease cost, but this doesn't differ from anywhere else in the greater Seattle area. For small businesses it's a killer, literally.

Traffic and congestion

Traffic and congestion, construction

Traffic and congestion. Good and bad that there is growth, but it limits the access to the freeways, car traffic.

Traffic and insufficient public transportation options.

traffic and parking

traffic and transportation

Traffic and transportation

Traffic circulation.

traffic congestion

Traffic congestion

Traffic congestion now, and getting worse with over building.

Traffic congestion.

Traffic flow.

Traffic is almost impossible to deal with. This is a regional issue, but affects Bellevue because it is a pro-business community that depends heavily on good multi-modal transportation options.

traffic management

Traffic planning/infrastructure. Employees, customers, etc. all need to be able to access businesses. If the traffic is terrible they will look elsewhere.

Traffic, it is difficult to get around and commute takes additional time.

Traffic, parking so many detours and blockages.

traffic, parking, construction, bulldozing all the trees

Traffic, too much of it.

Traffic! It is getting so difficult just to get to Downtown Bellevue on freeways or back roads and to get back out. And, once you get off the freeway, a lot of times it is bumper to bumper on NE 8th and other main roads. It used to be that if you waited until after 9:30 or 10:00 am, traffic was really good. But now, it seems like it is congested throughout the day. I am excited to see that Bellevue is finally opening up a nice size park on the lake for business owners and employees to enjoy and walk to. Kirkland, Renton and Seattle all have done this. I feel like Bellevue did not plan well for this many years ago and properties along the lake almost all went private. Great job! Hoping you can add to it in the future! Getting people out and walking at lunch times with nature helps them to be more productive and creative. Also, love to see the public arts!

Traffic. Clients continually complain of the I 405 traffic. The exit #10 Coal Creek Parkway traffic. Wastes people's time.

Traffic. Getting into and out of Bellevue at peak times is a challenge for our employees and clients. We have begun allowing our employees that live in Seattle commute during off peak hours even though that is not ideal for our operations.

Traffic. Too much road construction and never finishes. Especially 8th. It seems a waste not using one line after a long construction work.

Traffic. And losing the aesthetic beauty. The city has torn down many mature trees along the lake. They are also allowing buildings to go that overcrowded. They are taking out the green and building right up to the side walk like they do in New York and it is awful.

Traffic. Especially on the I-405 corridor, and 2ndly on the bridges.

Traffic. Specifically, the coordination and timing of traffic lights.

Traffic. There is a lot of traffic.

Traffic. With the growth, the ability to reduce traffic congestion.

transit

Transit

Transportation

transportation and infrastructure

Transportation and parking

Transportation and the ability to have employees get to Bellevue by other means besides driving their own car.

transportation system

Transportation, both into and out of town and between Bellevue and Seattle.

Transportation. Ease of transportation, less congestion.

Transportation. Getting employees in and out of town.

Transportation. Public transportation.

Transportation. Public transportation needs some serious upgrades.

Transportation. Road are too congested, not enough park and ride.

urban growth

x

Information Technology	?
	A nice place to live, cost of living, and low taxes.
	Accessibility
	Affordable housing
	Antiquated licensing program. Why not be fully integrated with Washington state? Why do I have to go to a third-party (and pay a fee!) to license my business in Bellevue? In contrast, Sammamish (and many other cities near Bellevue) are properly integrated with the state systems.
	B&O taxes are egregiously high
	Businesses moving away because of the continue upgrade in the Downtown area
	City taxes are high.
	Commute
	Compliance on the sales tax and B&O is complicated and time consuming
	Cumbersome online registration process (File Local). Was unable to use the online system, some glitch with registering 2 locations. (One in Issaquah, other in Bellevue). Had to make numerous phone calls, and still wasn't resolved on a timely basis. Had to mail in my initial report.
	Don't know
	Ease of access to the downtown core from other municipalities. Adding light rail access is something we believe will greatly improve this accessibility.
	Employee satisfaction. I think the quality of life. I think they are going to crowd out the higher level of education.
	have not had much dealings with the city so I refrain from responding
	Having strong presence from all high-tech companies.
	healthcare
	High cost of office space.
	High rents
	Housing cost for people working in Bellevue: affects ability to hire and increases traffic congestion
	I don't really know much about doing business in Bellevue, I am a new business. For me it is just having access to resources to connect with other small businesses like the Chamber of Commerce.
	I'm actually a pretty small business, with little city impact. http://movebeyondlimits.com
	Incentives for small business and startup companies.
	Lack of Internet in pockets of Bellevue (only slow DSL thru phone company is available in certain parts of bel-red office complexes)
	lack of light industrial areas
	Lack of Startup support in Bellevue
Location, not convenient.	

	Making the business environment enticing for large companies, so small businesses can grow and help the large businesses thrive and thus thrive themselves.
	managing expansion and positioning as best city for business in WA
	managing growth and traffic
	Need to simplify B&O reporting so a separate City of Bellevue report is not needed, instead file based on the state B&O reporting.
	none
	None
	Not enough street advertisement opportunities. Put some big bards/TVs and fill city with money from ads, why not doing this?
	Not sure
	Office rental space availability and cost.
	Online Business Tax vendor charges a lot of fees - over \$5, and does not update rate changes timely. No other online vendor charges more than \$2 total
	Outrageous real-estate prices with too many Bellevue outsiders pouring in..
	Public transportation
	Rapidly increasing density is driving costs and congestion to the point where it's not feasible for businesses to locate here, or for employees to live here.
	REAL ESTATE COSTS
	reasonable renting fee
	Retaining higher valued startups and keeping the tech space open.
	Sales tax rate
	space/parking and cost
	Tax incentives for small business/startup companies. Help for small business/startups to compete in a market full of large established corporations.
	Taxes
	Taxes and regulations are too impactful to a good business environment.
	The City B&O tax rate is a bit high and it will be better if the B&O tax could be reduced to some extent if possible.
	the leftist direction of the city council (as a problem, just to be clear)
	The market. The spending potential for residence.
	traffic
	Traffic
	Traffic and growth... Too many new apartments and condominiums
	Traffic and parking
	Traffic Congestion

	Traffic is not good.
	traffic, parking
	traffic, parking and access to public transport options for employees
	Traffic. Moving people and goods has gotten very challenging. I know it is a factor of growth, which is good. But I am hoping that light rail will alleviate some of that pressure.
	transportation
	Transportation
	Transportation is congested such that 5-10 mile commutes during peak hours could take more than an hour to accomplish. This impacts all transportation, including private and commercial transport. Further, peak commute periods are growing as a side-effect. The city's segment of the 405 corridor is now congested with stop-and-go traffic conditions as much as 6 hours per work day. Intelligent traffic signal control (such as in Factoria) alleviates some of this effect in satellite thoroughfares, but not sufficiently to lessen the congestion of the main arteries. The underlying cause of this congestion is the choke-point at the intersection of I-90 and 405, where access and egress functions share a common lane of traffic. This cost-saving aspect of this intersection's design is a Pareto solution, and the city is now suffering its hidden cost in the form of so many unnecessary man-hours squandered in traffic jams.
	We do not employ people, but for businesses that do, having affordable housing and transportation for employees is important. Also, not allowing gentrification to get so out of hand that important businesses, such as car or engine repair shops, to be forced further into the suburbs. I'd rather see the small businesses, even if they aren't so tidy or pretty. The Spring district will destroy many functional small businesses for a bunch of trendy shops and apartments. Catering to the wealthy and the jet set.
Retail	'I'm undecided.
	Access to the city.
	Affordability of housing for employees, affordability of rental rates for biz
	affordability
	Attitude. Everyone is positive working here. And happy to be here.
	Available parking
	awareness
	Bad traffic on the crossroads and freeways leading in to Bellevue.
	Bellevue City Council Members having financial stakes related to voting issues that they actively vote on.
	Business and occupation taxes. Keeping the rates down.
	City taxes is a little higher than other cities.
	Congestion on the roads to a business. 1100 new apartment units, two streets.
	Controlling growth and development
	Cost
	cost of doing business
	Cost of living is so high that it is difficult to find retail level (and retail level pay) employees. Because of the cost people need to make more money and in our business, we cannot afford that.

Cost of operation and real estate.
cost of rent for office & industrial space
Don't see any support from city on the small business.
Duh, traffic issues.
Employee Parking. Employee Parking especially in Old Bellevue. There should be a parking lot for all day parking for employees and guests. Kirkland has built a parking lot near the police station for employee park. Other city's that hope for tourist that are much smaller than Bellevue have built public parking lots. Bellevue seems to have an ordinance against free standing garages providing more than three hours of parking ---which turns companies like Diamond Parking from building parking garages in Bellevue. If the gravel parking lot just north of Wildwood Park could have a multi floor garage it could service Old Bellevue, Wildwood Park, the new Marine Park, and Bellevue's main down town park. Lack of Parking is chocking business in Old Bellevue. Employees are forced to park --especially in the evening -- on the street ---and then there is no parking for guest.
Expensive rent
From an independent retailer's point of view, I feel that the emphasis on "mall and high-rise apt." culture vs good urban planning with smaller walkable retail centers is detrimental to a diverse commercial eco-system. Main Street is not viable and there is not enough foot traffic in the mall to justify the rent.
Government accessibility without fee and transparency.
growth management
Growths impact to existing businesses.
I don't have any customers.
I'm not quite sure.
Improving traffic on I 405
Inability to match human movement to business growth.
ineffective city hall
Infrastructure not keeping pace with rapid growth
It is too expensive to do business. It is impossible to find affordable office space. The focus has been on making money not providing services at an affordable rate. Office rent alone is close to putting me out of business. This city is catering to developers and large corporations and not supporting small businesses and employees who work for local businesses. Employees can't afford to live in the community they work in. The stress and cost of long commutes decreases their quality of life.
Just ecommerce, which is online. It is a competitive market to Bellevue.
Keeping growth focused to encapsulated our forested office parks. Keep height restrictions for commercial buildings limited outside DT. Create livable areas incorporating commercial and residential areas; no DADU's in R-5 which Residents incur traffic congestion and require tax levies to pay for improvements. Businesses are blamed for such impacts.
lack of public transportation
Locally owned small business issues.
Lower permit fee for construction, remodeling, and lower water bill will help. Extra parking will help a lot

N/A
Neutral. I have a tiny entertainment business that Bellevue audiences don't care about.
New business, so I am still figuring things out, but if I had to say something, it's congestion and traffic and lack of parking
Not sure. I have a home-based business
Nothing.
One single location that will explain the policies to the new companies.
Our business is not the typical type of business you'd find in a metropolitan downtown area. That said, flat, above ground, close, free parking is hardly available - and I realize this largely based on the building use/building owner.
Parking
PARKING
Parking and traffic.
Parking. There is a lack of parking.
Population is increasing.
PROPERTY IS TOO EXPENSIVE
Regulations / permitting
Relating to parking. People can't park they can't do business with you.
Roads, traffic there is too many cars.
Signage is hard with all the regulation/stipulations. I've been here in downtown Bellevue for two years and have received no outreach (besides this) to be supported as far as an organization, tourism etc.
streets and access
tax rate
taxes
Taxes
Taxes are too high. It's prohibitively too expensive to start a business in Bellevue.
Taxes high taxes.
Taxes.
The ability to put temporary signs up without having to go through the city
The cost of doing business for small business is too much. It is putting many businesses out of business. Small business rents are pricing business out of business. Many really good local small businesses have been lost. It is difficult as a consumer as well to find good quality service and products due to the loss of these businesses. These large corporations provide superficial service with employees who do not know or value the products they sell. It is just a job.
the encumbering weight of regulation
The light rail is wiping out the businesses.

The safety environment.
The single most important issue related to my business location is parking. First & foremost! Customers LOVE coming to Main Street. I hear that constantly. But the other comment I hear is "I almost didn't come to your store because I had a hard time finding a parking spot". The Main Street district (Old Bellevue) is a very important part of attracting people to Bellevue. Please don't let it "die on the vine".
The Traffic in and out of Bellevue is to congestive, am considering moving out of Bellevue.
Too difficult to get permits approved from all departments.
Too many apartments in the CBD
Too many Construction projects go it alone.
Too many hotels and apartment buildings.
Too many taxes and too complicated to pay them
traffic
Traffic
Traffic and taxes
traffic and unfavorable tax plan
traffic congestion
Traffic congestion and construction
Traffic how can anyone shop when there is no parking.
Traffic is bad
Traffic issues
Traffic management. I think rta is going to interfere with business in Bellevue.
Traffic within city limits, our company cannot use transit to make deliveries in residential neighborhoods
Traffic. For us it's parking.
Traffic. Oh, and traffic again. Also, preserving greenbelt space. Trees keep the city beautiful and attractive. Removing trees for more development for more houses for more cars creates more traffic. Why does Microsoft have a private shuttle service? Why not have a fantastic public transit system? Look at Japan for inspiration. Seriously.
Traffic. The traffic is over congested.
TRANSPORTATION
Transportation (traffic) and choice of internet connectivity and speed. At my location, there is only one viable internet provider which is a monopoly causing the price to be too high while performance is too low for the price paid. City of Bellevue should encourage internet provider competition. One solution to traffic issues is the ability to work remotely which requires good internet. Side road traffic is becoming a major issue - Richards Rd, SE Newport Way, Factoria, Coal Creek, all jammed up and so backed-up that neighborhood movement is many times longer than just a few years ago because traffic is avoiding freeway delays.
Usage of taxes by the city, regarding roads and urban development.

	<p>We're pretty new to the game (launched September 2016). I think the most important thing is creating an environment where people can launch the initial business idea - there are so many fees, regulations, taxes, act. that aren't city related that are required from new business owners. Having city regulations that don't further burden the effort to launch are extremely important. I've so far found that Bellevue forms, fees, taxes, etc. work in favor for those starting out. If a new business can't even start due to heavy regulation and fees, it can also never be taxed. So, it's a win-win for the city and the business owner(s).</p>
	Zoning. Lack of options.
Tourism	??
	A few pointless programs. Example, the city requires a grease trap in my smoothie shops. Someone died in my greastrap cleaning it. All because the city required a pointless grease trap.
	Accessibility. Businesses are hampered by in coming growth.
	affordable retail space, parking, traffic congestion
	Balancing competing issues
	Cannot comment on this.
	Chamber of Commerce too expensive and prevents me from participating.
	Consumer value
	Crime (or lack thereof). This is a very safe city in which to do business, and we appreciate that fact.
	Hi cost for small business with a retail location
	Hourly wage has gone up and small business tries hard to be competitive.
	Hourly wage. Businesses will not survive if Bellevue follows the \$15 minimum wage in Seattle.
	I'm a small entertainment business. I don't deal with the City except for taxes.
	Lack of planning for businesses to be successful and excessive planning for public expending for homeless and public transport at the expense of offending commuter with jobs and safety of neighborhoods
	lease rates/ rents
	Length of time to process permits/
	Light rail - so glad it's moving ahead.
	managing taxes
	Minimum wage increases are ridiculous and make no sense in the Marketplace. I am forced to pay teenage employees based on what a grown man needs to earn to support his family of four. Total waste of time and money and makes no sense.
	No housing for employees, need minimal wage housing closer to Bellevue! Also, we need more public transport in Bellevue
	Ongoing construction, parking, and getting around the city
	Over-deployment of neighborhoods are driving traffic to distraction.... No one wants to shop in small stores. You've totally destroyed traffic patterns with no regard to people working and living in this city. The infrastructure doesn't in any way reflect the large population you're bringing into the neighborhoods. And the "Rodeo Drive'esque" vibe you seem to want our city to be doesn't provide or support the blue and light-blue collar workers this city built.
	Parking

	Permit, unnecessary delays & hassles.
	Probably the taxes.
	Regressive taxes on small business and regulations that are harder on small businesses than large
	Safety
	The rent is going up.
	The road construction near the Northup Way has been going on for years. It is killing my business. My sales are down over 30% prior to road construction. Also, City of Bellevue is the only city that require a permit to hand sign/banners outside. I have stores in 8 different cities but Bellevue is the only one. Or at least is the only city that is enforcing the law.
	The taxes are so high for the small businesses but you run to help the major companies.
	The zoning. The type of business you can open in a certain area.
	tourism
	Traffic
	traffic and parking
	Traffic and the lack of parking. There is a lot of construction. As well as the lack of green space.
	traffic congestion
	Traffic flow
	Traffic, losing charm.
	Traffic. As long as the flow doesn't colleid with the construction and road work it is ok.
	Transportation
	We are a new business in Bellevue. The permitting/inspection process was cumbersome and at times, inefficient. It appears that there is ineffective and/or little communication between departments, therefore, it is up to the business owner to coordinate the schedules of inspectors and permitting. Also, it would have been helpful if the inspectors were able to provide us with a basic list of items that needs to be done for new businesses, knowing that there will be other specific items depending on the site.
	With so much development and the resulting retail established businesses will struggle trying to grow their market share
	Other
	A tie: Safety & Security Transportation
	Ability to build at a faster pace. Takes way too long to get permits
	access
	Access
	access to employees
	access to the business and transportation for employees
	Access to travel. There are some limitation in the area to have quick access.
	Accessibility for customers re: traffic and reasonable parking

Affordable commercial real estate, particularly smaller spaces for small businesses like mine
Affordable homes
Affordable housing.
Affordable housing...
Affordable office space for small businesses.
Affordable rent for small businesses.
Affordable rent.
Again, it is growth which is causing huge traffic backups and you can't get around as easy as you used to be able to.
Ample parking
At the moment construction and parking issues for our guests.
Attracting new customers (for me that is)
available housing
B and o
Bellevue is high quality of city, most of the high quality of people living around. and more convenient for them to the shop.
Bellevue should be a place where it is inexpensive to run a business and permits should be easily obtained.
better traffic control
business and development need to be balanced with neighborhood livability
Business and occupation tax, the rates are too high compared to other cities.
Business environment such as tax, support to business.
Business tax on income received
City services and choice limitation in technology and mobile services.
Clogged Traffic Everywhere
Commute times due to poor city planning and lack of road capacity.
Condition of the roads
congestion
Congestion and construction causes delays when traveling to, from and during typical work day
Congestion and ease of parking
congestion and traffic
Congestion. It is difficult to get around.
Construction
construction

Construction - I used to have my office at Lake Bellevue. For over a year we had construction and major parking issues. I moved to SE 8th and now I have construction outside as well. Luckily my parking lot is not under construction, so my clients can park, if they can get past the construction.
Construction during business hours. Blocking roads, blocking businesses and causing traffic.
construction everywhere
construction impedes customers access to my business
Construction is everywhere.
Construction. Ability to get places.
Continue to strive to make less confusing. I spent a lot of time and energy my first year just figuring out what I needed to do or did not need to do.
Continuing to support a business-friendly environment.
Contractor
Convenient location for commute form nearby cities
Coordination. Being more user friendly for businesses to get permits. That process is way too long.
cost
cost of rent/price per square foot, with very poor choice and low inventory
cost of running a business
Cost per square footage - to be able to have a business in Bellevue.
Cost to buy, rent or lease space in Bellevue is very high.
Cost to develop real estate and bring new tenants to City of Bellevue is significantly higher than surrounding cities.
Costs to run a successful small business make me consider taking a salaried employee position with a larger company which in my opinion defeats the purpose of the American dream.
Development, new buildings, construction and how these new developments effect existing business
Developmental planning of future transportation.
Dislocation of light manufacturing businesses due to Bel-Red corridor development
diversity
don't know
Downtown parking, maybe.
Driving small businesses out of city core particularly small retail/storage/warehouse to locations from the central Bellevue city core (core defined as 1.5-mile radius from city hall)
Ease of information
Ease of traffic flow and parking
Economic diversity.

	Employees can't live here, it is too expensive. It is harder to get quality staff due to long commutes. We would like to see some housing that is built and designed to support people who make under \$50,000.
	Encouraging Bellevue offices to use local providers/suppliers (business based in Bellevue/Seattle or owners living in Bellevue/Seattle). I own a Bellevue business with numerous out of state competitors who grab business with little more than Google ads & clients give little thought to exporting dollars, lost tax base, etc.
	Enforcement of code compliance.
	excessive wage expectations
	expensive
	Extreme time lines for development permitting.
	Feeling a sense of security and safety.
	Fees, they are too much and too many. Too much regulations also such as signage in top of that regulation, there is a fee to have a sandwich board also! I've paid too much fees to open a business in Bellevue
	Finding employees that will work for less than \$13-15/hour. As a small business with high rent, it's hard to sustain.
	For me, it's a restrictive sign ordinance that's hurting us.
	For our home cleaning business, the affluent Bellevue community is a big PLUS; the fact that we experience a labor shortage, our location is a big NEGATIVE.
	For us it was trying to find rentable space without a 5-year lease. The other is location and visibility.
	Free parking
	free parking, clean safe environment for clients
	Guarding against excessive regulation
	Getting around the city. There are several times a day that traveling from one side of Bellevue to the other is arduous. Seems to be a traffic flow issue.
	Getting permits reviewed in a timely manner. Plan reviewers should be mandated to visit the job site in person within a reasonable time frame. My permit took 7 months to get approved and could have been approved immediately if she would have just visited right away.
	Getting rid of sound transit.
	Greater improvement in traffic flow and alternative means to Seattle and the surrounding Eastside
	growth and medical services
	Growth and traffic
	Growth. Expeditious growth offers a lot of competition even though it does give opportunity for businesses.
	Growth. The number of high rise buildings that are going in everywhere.
	Growth. Managing growth.
	handling the growth
	Handling the homeless problem in the business areas. If customers and residents do not feel safe or are harassed, it reflects in their comfort to partake in what the city has to offer.

Hard to say, not there often enough
Having a business-friendly government/ city hall
Having people feel safe and secure.
Health care. More clinics available in the City of Bellevue.
health of the local economy
Hi density and overcrowded road ways. Too many apartments being developed.
High Business rents
High rent
High rent cost and Traffic in the down town area.
High taxes
High taxes and cost of rent for small businesses limit the ability to grow and hire employees.
High taxes poor return
High taxes.
Highway traffic in and out of Bellevue
Highway traffic is really bad and matters during commute hours
hiring talent at a reasonable wage
Hotel Industry
Housing
Housing Affordability
housing costs are too high for my employees to live nearby so it's harder to recruit good staff, and those who do work for us commute very long distances
Housing that is affordable for potential employees. Many candidates will not come to the region because of the cost of living and the traffic-related problems associated with a commute from lower-cost areas outside Bellevue. It is a quality of life issue that is impacting the ability to hire many of the strongest candidates.
How quickly the city has grown over the last 10 years.
How will light rail impact Bellevue
I am a small business, I appreciate not having to file taxes each year
I am not sure.
I appreciate that I don't need to pay taxes on my home office. I do my work there out of convenience (i.e., I happen to live there) ... not because the location somehow improves my business.
I can't say much yet since it's been only 5 months.
I can't think of anything.
I don't have an answer for that.

I don't know
I don't know I'm not the property manager.
I don't know, we just opened and we are not even bringing in revenue yet, so at that point when we are actually up and going, I think I could add more.
I don't know. I haven't had any issues so far. I would suggest keeping taxes low so small businesses like mine can thrive.
I don't pay any Bellevue axes and I don' feel I get anything
I don't understand this question.
I have no comment about that.
I haven't been a business owner here long enough to comment on that
I haven't had any issues yet.
I see lots of benefits for living in Bellevue. I cannot see specific benefits for being a business owner in Bellevue.
I work out of my house and don't really have anything to add.
I'd say traffic. If they can traffic under control they can get more business.
I'm a very new business owner and not really able to address this issue.
I'm not sure about this.
Identity problem. Do we want to be a car driving suburb or a city like Seattle? This effects how people visit my business, the traffic, etc.
Infrastructure to support growth like parking, traffic control etc.
Infrastructure being built and Sound Transit.
IT
It has become parking. That there is scarce parking.
It's a toss-up between over development and transportation issues
It's obvious that the city is going for a bigger tax base by bringing in chain and corporate business and crowding out sole proprietor businesses. Many in my field have had to close shop because of light rail taking over, and they can't replicate their business anywhere in the city of Bellevue due to skyrocketing rents in the city. Shame on you city of Bellevue
jobs followed by safety
Just the traffic. It gets really bad for our clients to get to our office.
Keeping rents manageable for small lower profit businesses so business diversity is maintained
Keeping taxes manageable. There is a definite trend towards the local government wanting more money to manage more things (seemingly endless lists). The focus needs to be keeping capital in the private sector to enable reinvestment growth and innovation.
keeping traffic moving
Lack of affordable housing causes traffic from people who are living outside the city who are driving in to work.
lack of affordable housing for the people that work in Bellevue

Lack of affordable housing for workers.
Lack of quality internet and phone service in our area.
lease cost
Less regulation
Less regulations and taxes
Limited way to advertise business aside from online
Location
Location. Accessibility.
Low cost office
Low crime
Low Taxes, easy to do business, no red tape.
Mail
Maintaining a quality talent pool.
Make it easier to do business in Bellevue. My only real complaint is the permitting process and the amount of time it takes to get applications approved.
Making sure resources are available to all class statuses. Bellevue is home to a high percentage of immigrants and English as a Second Language residents as well as lower income.
Managing growth. Maintaining a socially and environmentally responsible environment.
Many people will not come to Bellevue because of traffic congestion.
Market
Mass transit. I don't agree with it.
Mass transportation
Minimizing customers being able to commute in cars.
My understanding is the permit process takes too long.
n/a
na
Networking
Networking or appreciation services
No available parking.
no comment
No need for light rail., just expand the bus service.
No response

Not being "Seattle-ized" - don't learn to "hate cars" but plan properly for access to downtown, ingress/egress to major arterials and freeways. Embrace technology without thinking everyone can ride the train!!!! Build coalitions and plan with neighboring municipalities for a cohesive infrastructure plan and be the anti-Seattle!

Not being over taxed.

Not interested, once again. Stop spamming me.

Not squeezing out small non-retail businesses for retail/housing development. For example, on the Bel-Red industrial corridor which will be converted to light rail with an accompanying retail building frenzy. Our light industrial businesses will be forced out as the property owners sell to apartment developers. Or be re-zoned out. I'm not sure what the current plans are.

nothing particular

One of the things is signage. Rent increases.

Over-regulation

parking

Parking

PARKING

Parking is becoming limited

Parking not enough.

Parking space for business vehicles!

Parking space! especially around Old Bellevue and downtown Bellevue Park

Parking, it's getting harder and harder to park in this city. Unless you have a lot that can accommodate staff and customers your business will be affected.

Parking, theft, breaking, traffic not easy for little guy, out to get you

Parking. It is horrible.

Parking. Not enough of it.

Parking. there is not enough.

Parking. There is tremendous build out taking place. The city planners "must" force new high rises to build the appropriate underground parking. This needs to be a requirement so Bellevue will be a destination location.

Parking. There isn't as much parking available as there used to be because were growing and paid parking its becoming a thing that is occurring.

People

People feeling comfortable about get to and from and around the city

Personally, I'm not sure what support I am receiving from the City for my taxes.

politics

Pricing the rent.

Probably mass transit and transportation. Getting in and out.

Probably taxes. Again, managing the value of it, managing the overhead.
Properly managing the modernization and upgrading of the business community
Property rent is making it less likely to stay in Bellevue. Parking on street for short term is not usually available; parking short and long term is too expensive.
Property taxes for apartment building owners are too high!
Property values making excessive rent costs.
Public safety
public transportation
Quality businesses and growth
Quick expansion without infrastructure
Rapid expansion without the bandwidth to support.
Real Estate
Real Estate Price and taxes
Reasonable business office space for small professional company
Regulations & Taxes
Regulatory burden. If you need to change something it is time consuming. You eventually get what you need but it takes time.
Rent prices
rent prices being so expensive only the largest companies can afford to have property here
Rent. It needs to be less for office leases.
Retail
Retail and restaurants
Retaining smaller businesses in Bellevue
rising rents
Rising rents
Safety
Safety and cleanliness. You want your customers to feel safe coming to your business regardless of the time of day. Additionally, a clean city is welcoming. I have worked in downtown Seattle where I literally had to walk around and over homeless people lying on the ground. Not to mention the dirt and graffiti everywhere. I often would move my car to a garage closer (and cost more per hour) if I knew I would finish work when it was after dark. A much nicer change to working here.
Safety of employees where I work.
Safety. To keep track of the vagrants.
Sales tax is too high
Sign postage is my primary issue

Signage and traffic
Small businesses need to feel welcome and promoted.
Sound Transit taking land away from businesses and driving up rent.
Streets.
Strong business-related city core.
support for small business
Support staff are fine to work with, but traffic in and around Bellevue is just the pits. We had to move our office to an area where clients could get to us easier.
Supporting small business
Tax in general/
Tax in small business. Wrong direction of transportation. Stop trying to get everyone out of their car and glorifying cyclist and pedestrians. Motorists are tax payers too and they pay for the roads and employees and affiliates of city of Bellevue salaries. Act like it!
tax is too high
tax rate
taxes
Taxes
Taxes and property value
Taxes and regulations taxes are too high.
Taxes and rent
Taxes horrible.
taxes too high
Taxes too high for small businesses
The ability for residents and employees to move get to and move around Bellevue has become significantly more difficult in recent years. Specifically, east/west transportation through the city is congested at light controlled intersections, and take multiple light cycles before vehicles can cross intersections. Specifically, 148th near Bel-Red, North-up and NE 24th St. I have had to accommodate employees by altering work schedules to travel at less congested travel times, which is challenging to team projects. Bellevue must address the additional traffic that comes with the planned housing of the Spring District, LIV, Estera Park, Crossroads and the surrounding areas.
The biggest issues is just getting into the city now. Traffic gets backed up on Bellevue Way.
The cost is quiet high
The high cost of housing is a big issue for me. When the cost of paying the rent takes up more and more of a person's wages, the less he has to spend on other things.
The homeless problem is out of control. We have people parked in RVs surrounding our business making our customers feel unsafe. Police can't do anything because it is not illegal. This brings the value down for the whole city.
The impact infrastructure construction has on business operations. The lack of parking available in the downtown area.

the lack of crime and dirty areas such as homeless camps and filth like downtown Seattle

The people who shop in Bellevue are separate from those who work in Bellevue retail. This also means with Bellevue having an embarrassingly low minimum wage compared to any business on the other side of Lake Washington, employees are hard to find and the likelihood of a potential employee shopping in Bellevue is close to zero. Hiring signs and advertisements don't work and nobody wants to commute to get paid less than in Seattle or its other surrounding areas.

The permitting process is time consuming and confusing, after almost 2 hours on the phone I still wasn't sure what kind of sign I could put up. I was passed from person to person and was finally told to send in the designs I had in mind and they would tell me if it would be OK or not. It felt as if I was being discouraged from expanding my shop.

The plans for light rail coming to Bellevue will greatly improve business in Bellevue I think the city should plan and execute all viable plans to relieve traffic and congestion, especially considering all the new apartment/condo complexes that are being developed

The quickly shrinking availability of small business space...and that is affordable.

The sound transit. The sound transit will be closed to us during construction.

The traffic is terrible.

The traffic. Getting to the point of gridlock.

There are no problems

There should be a business or Industrial Zone

There's too many bureaucrats running businesses and they over tax us.

This is not necessarily an issue, but my biggest beef with this city, is the lack of understanding how important our schools are. They continually make it extremely difficult for new construction and do not use any form of sense when understanding the relationship, they should have with the district. For example, excessive water connection fees being charged to a school district? They should be exempt from most fees like this. They are here to help the community, and it looks like the city is trying to punish them for that.

Too busy. Lack of workers compared to the amount of clients.

Too many of the same type of business coming into the city causing competition.

too much competition

too much development and too much traffic

Too much tax and rentals are expensive

traffic

Traffic

traffic access to businesses

Traffic and access

traffic and affordable housing

Traffic and congestion.

Traffic and parking

Traffic and Parking.

Traffic and parking. Allowing customers/clients to access business is key to thriving businesses.
Traffic caused by the dense population expansion from all the high rises going in! Bellevue has become a vision of newer dollar driven people. It is no longer a city, community, or place to raise a family.
traffic congestion
Traffic congestion
Traffic Congestion
Traffic congestion a nightmare.
Traffic congestion making it hard for my clients to get to me easily. (I'm a psychologist.)
Traffic congestion. Our customers can't get to us. They can do business outside of the I-405 area and same travel time
Traffic congestion. Wasted hours on roads undersized for population equals lost wages and profits. Bellevue has overgrown its' capacity and needs to be more sensitive to ecological and geographical boundaries inherent with this area. Bellevue needs to charge the big \$ companies a larger piece of the cost for proper infrastructure to support the workforce they wish to have and need.
Traffic due to road construction
Traffic flow
traffic flow--ability for clients to get to me--parking availability/access; increase in rental space is getting too high
Traffic for employees. Trying to make it so it does not an hour to get here if you live more than 5 miles away.
Traffic getting here and leaving has become much more problematic!
traffic in the evening along 112th, NE4th, Bellevue Way and 405
Traffic is getting worse so it has significantly affected the business in Bellevue, or the Greater Eastside. Let's work on a better traffic flow. Also, I am not seeing downtown where you can really stroll along and enjoy walking. It's too small, and not very waking-friendly. I am hoping there will be more activities, more shops and leisure areas for adults and kids in downtown Bellevue.
Traffic is terrible. Fix that you will fix everything.
Traffic is too congested.
Traffic jam
TRAFFIC MOVEMENT/UNABLE TO PARK TO SERVICE CLIENTS
Traffic waste a lot of time in traffic.
traffic- following Seattle like sheep regarding the light rail plan and bullying people into "going along" with the plan
traffic, access to businesses
Traffic, and people's ability to get where they need to go in a timely way. Adding too much housing without supporting infrastructure.
Traffic!
Traffic? Labor prices? Cost of living? Not sure if there is just one.
Traffic.

Traffic.
Traffic. Too much. It takes too much time to go from one end to the other.
Traffic. I think that or parking will be the two biggest issues that will come up.
Traffic. I think they need keep Bellevue from turning into Seattle.
Traffic. It could be lighter.
Traffic. It is horrible.
Traffic. It's too much traffic.
Traffic. The accessibility. It takes around 20- 30 minutes to get to the freeway.
Traffic. The congestion of the traffic.
Traffic. There is too much of traffic.
Traffic. There is too much traffic.
Traffic...hard to get anywhere on time.
Traffic. There is a lot of traffic and construction that affects traffic.
Traffic. There is too much of it.
Traffic, that's what we make our business off of.
transportation
Transportation
transportation and parking
Transportation and parking
Transportation and traffic. Easing congestion.
Transportation for employees, ability to get around.
Transportation--need for better public transportation to more areas.
transportation, 405 from I90 to I520
Transportation. A lot of congestion out there. It is not easy to get because of the 405 and the 520
Transportation. Congestion, I think that's one of them, one of the biggest problems right now.
Transportation. Continue to develop transportation that will support the growth.
Transportation. I think it is extremely difficult for people to get around the city.
Transportation. It is extremely difficult to get in and out and get around.
Transportation. Making sure we have bus access and public transportation availability.
Trying to develop Bellevue into a city like Seattle when it's not meant to handle that many people.
Unsure

	Unsure.
	value for taxes
	very fast
	Very high living expenses to live in Bellevue.
	We have a small home office in Bellevue. I am not sure this is applicable.

Open Ended Responses to BNWRG4_A: Why do you think Bellevue is headed in the **right direction**

Reasons Bellevue is Headed in the Right Direction												
	Overall (678)		Business Services (n=204)		Information Technology (n=57)		Retail (n=78)		Tourism (n=32)		Other (n=307)	
Growth/development	158	23%	39	19%	12	21%	14	18%	12	38%	81	26%
Business Friendly/Economy	71	11%	22	11%	9	16%	4	5%	3	9%	33	11%
Future/forward thinking/Proactive Leadership/Progressive	50	7%	13	6%	2	4%	6	8%	1	3%	28	9%
Well managed/Well Planned	39	6%	11	5%	4	7%	5	6%	1	3%	18	6%
Clean/Environment/Quality of Life	31	5%	11	5%	3	5%	5	6%	0	0%	12	4%
Infrastructure	30	4%	10	5%	3	5%	3	4%	3	9%	11	4%
Public Transit/Transportation	29	4%	11	5%	1	2%	0	0%	0	0%	17	6%
Helpful/Supportive/Responsive/Friendly/Positive	25	4%	15	7%	3	5%	1	1%	0	0%	6	2%
Light Rail	21	3%	8	4%	3	5%	4	5%	2	6%	4	1%
Easy/Access to Services/Amenities	19	3%	8	4%	2	4%	1	1%	0	0%	8	3%
Taxes	17	3%	5	3%	1	2%	2	3%	2	6%	7	2%
Location/Convenient	16	2%	4	2%	1	2%	4	5%	0	0%	7	2%
Traffic	15	2%	6	3%	0	0%	5	6%	0	0%	4	1%
Cost/Expensive	15	2%	3	2%	0	0%	2	3%	2	6%	8	3%
Regulations/Red Tape/Bureaucracy	13	2%	6	3%	1	2%	2	3%	0	0%	4	1%
Variety/Diversity	13	2%	4	2%	1	2%	0	0%	0	0%	8	3%
Safe	12	2%	0	0%	2	4%	0	0%	1	3%	9	3%
Unmanaged growth or development/overcrowding	9	1%	3	2%	1	2%	1	1%	0	0%	4	1%
Tech Industry	6	1%	1	1%	3	5%	0	0%	0	0%	2	1%
Unfriendly to small/local business	5	1%	0	0%	0	0%	1	1%	0	0%	4	1%
Not helpful	2	0%	1	1%	0	0%	0	0%	0	0%	1	0%
Unaware of services provided by City	1	0%	0	0%	0	0%	1	1%	0	0%	0	0%
Traditional / Old	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%
Density	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%
Other	126	19%	32	16%	7	12%	22	28%	7	22%	58	19%

Headed in Right Direction

Business Services	A current majority on the city council seems to recognize the importance of the business community, in terms of economic growth and opportunity, and how allowing business to be successful benefits the community as a whole.
	Access
	Accurate Services
	All inclusive
	Allowing infrastructure to accommodate development
	alternative transportation
	attention to customer
	balanced planning
	beautiful
	bloated beurocracy
	blooming oppourtunities
	Booming in general
	business friendly
	Business friendly
	Business Friendly
	Business Friendly City Council
	business growth
	Business is migrating to Bellevue rather than away
	business minded decisions
	business oriented
	Business oriented
	celebrate diversity
	city council
	city personnel is accessible
	Clean
	clean and professional
	Clean parks
	Clean Pedestrian Friendly
	Clean, Maintained



cleanliness
Community
Controlled growth
convenience location for business
Creativity, listen to the people. Try to take overall view. Interaction.
Customer Friendly
Development
Development.
disconnected
diverse and business
Diversity
downtown
Ease to work with
Easy to work with
economic development programs
economic growth and support from the city
Electric power outages
employment opportunities
Encouraging building and getting started on the rail service.
Expanding business growth
Focusing on business growth w/o losing sense of community.
FOOD AND CULTURE
For small businesses or development businesses including retail shops such as selling cute and small items to attract ladies and girls, the monthly rent and operating expenses have been dramatically increased every single year. Those make small businesses and such retail shops very hard to do business just to run its business itself in Bellevue even though qualities of resources are good here. And because of high rent fee and increasing operating costs, the qualities of resources Bellevue has also dramatically being down.
Forward Thinking City Council City Manager
Forward-looking
free parking
great
Good balance between competing interests
good clean construction



Good development
good expansion
good growth
good infrastructure
Good infrastructure
good planning
good school district
good schools
Good Services
Good Support
good transportation
great place
Great Planning
Growing
growth
Growth
growth & economy
Growth and diversity
growth infrastructure
Growth opportunities
Growth Oriented
High Taxes
home business
I don't conduct business with the public
I don't know.
I don't have any comment
Improved Infrastructure
Improvements to the downtown area light rail
industry heavy
inevitable
Infrastructure Investment

Innovation
investing in infrastructure to make it easier to travel to/from/around Bellevue
investment in public infrastructure
it appears to be attracting business
IT IS A GREAT CITY OF OUR STATE
lacking outreach
light rail
Light rail
Light Rail
Livability
Location
Lots of Resources
low taxes
low taxes, parks, arts, limited regulations, family friendly
Make business easy.
Management of business growth
Managing growth
Mass transit
Metro Coming
Metro feeling with a small-town feel
moderate growth
More business
most of the council is business oriented
new business & transit
New Businesses
New growth
nice city
no comment
no idea
no opinion
No ridiculous city ordinances

Not familiar with what Bellevue is working toward
Not worsening.
online services
Open ACCESS
open spaces
Organized
over development
pedestrian friendly
people
Permitting
Planning for growth
poor traffic & growth mgmt.
Positive Community Involvement
pro-business environment
proactive planning
Proactive stance
PROGRESS
progressive
Progressive
Progressive attitude
progressive forward thinking
progressive vision
promotes business
Public Transit Improvements
Quality of life
question is vague
Rapid Transit
Red tape
Rent is too high.
responsive
Responsive

Responsive to Residence
road improvements
Seattle
service commitment
service provided
Slow decision-making process
Smart development, everything good but traffic congestion, parking
Sound Transit
still small
streets
Streets and transportation do not meet the demand, too much traffic congestion
Strong Economic Growth/Strategic Planning
Tackling housing issue
Tax policies to reduce the tax burden of small business, communications in how to run a business in Bellevue
Technology
Terrible parking. Expensive rent
The City of Bellevue is fully invested in meeting the needs of their residents and businesses.
The development of businesses in Bellevue brings in more customers. It is health to see many businesses thrive so that people can congregate in Bellevue.
Too "Progressive"
Too many new condos and plans for rail will destroy this city
Too many rules, too many signs, too much consensus seeking
Traffic is the negative, Positive is good retail area
Traffic Management
Traffic Solutions
Transportation
Transportation improvements.
Trying to make this city become a global hub, high-quality office and business environments with well organized, surrounded by great nature
Unsure of where it is headed
urban development
Use of resources

	Vibrant economy.
	vibrant workforce
	Vision
	Walk score
	You are asking for my feedback!
Information Technology	?
	Attracts people from elsewhere
	Attracting more professionals
	Balancing quality of life with business
	Because of big giants choosing that place.
	Business and community
	business development
	business friendly
	business growth
	by asking business opinion
	changing
	Comfortable building qualities
	commercially oriented
	Convenient
	Development, Growth
	don't know
	expended downtown
	good planning, services
	Good policies
	growing city
	growing local economy
	growing/crowded
	Growth
	growth management
	growth technology
Growth, opportunities	

	Huge potential
	increased housing
	infrastructure, maintenance
	IT
	It is investing in the city with cooperating with business
	job market
	light rail
	Light Rail
	Listen to comments
	Looking to the future
	making tax filing electronic
	Modern clean streets
	Modern, safe and centralized
	Nice place to do business
	no opinion + or -
	Planning
	Quality
	Quality of life
	robust
	Safe and disciplined
	Seem to be focused on helping small businesses
	services provided
	smart growth
	Solid infrastructure, public transportation
	Tech Hub
	The city of Bellevue is very helpful and responsive to any problems that I have.
	thoughtful leadership
	very efficient work
	Visible Growth
	well run
Retail	405 is so bad

Attracting interesting businesses
Attractive city
bad traffic
Because I think a lot of businesses are coming.
Business friendly
BUSINESS IS BOOMING
City planning
considered planning
Constant improvement
development
don't know
Don't use/understand city services
Economic Growth
Efficient
Fewer intrusions
foresight
Forward Thinking
gives a form to air problems
Good Growth
good location
good resources
Growing
GROWING IS GOOD
Growth
GROWTH
High operating costs
I don't know.
I don't know their criteria, future or past. their city planners are doing a decent job
internal analysis
investments in infrastructure
Keeping newer brands within city limits

Keeping up with the times.
Knowing the history of the City of Bellevue
Less liberal
light rail
Light rail
Light rail wiping out business
Location
location & talent
low minimum wages
make small business difficult to survive due to expand large building
managing growth
many opportunities
Metropolitan / Convenient
Modest fee on small business class
more people moved in
New roads and buildings. More business
NOT MUCH OPINION EITHER WAY
Parking!
planned development
Police department
Police empowerment
population
Positive environment
Progressive
Progressive city
progressive city good city officials
Quality of life
quality of life, schools
Quickly growing
Reasonable Processes
Seems to be small business friendly (we're online only, but physically based in Bellevue and Boise). The \$160k gross receipt B&O threshold is reasonable and helpful when you're trying to get a small business off the ground.



	tax and HR cost are high
	The city is growing and it is a desirable place to live.
	The development they are doing.
	Too Much Growth
	traffic
	TRAFFIC
	traffic city taxes
	Wealthy corruption
	Website
	well planned infrastructure
	Willing to grow alongside commuters
	zoning changes
	zoning control
Tourism	??
	average support
	Avoid Seattle's Path
	Business Growth
	Consistent business growth
	Continued investment in infrastructure
	Easy to set up business here
	Fast growth, slow infrastructure
	focus on technology and education
	Foot traffic
	growth
	Growth
	GROWTH
	growth & Quality
	Growth and Infrastructure
	high demand
	Homelessness RV's not visible
Initiative safe	

	Innovative and creative
	Kemper Freeman
	light rail
	Light rail station
	major growth area
	more favorable to small businesses
	new initiatives, economic growth
	Nice Growth
	price of everything
	Rent is too high
	Sound management
	taxes filed by paper
	too many taxes
	vibrant economy
Other	access
	All the building.
	All the new construction. The light rails.
	Anticipating growth
	balance
	Balanced growth
	Because of the City Management's vision for the City.
	Becoming a hub
	Becoming a real city
	becoming the new Seattle
	Bellevue is putting right resources at capital construction, which is good for city development
	Blandly Homogenized
	booming economy
	building up infrastructure and transportation options for workers and customers
	building infra
	business & residential balance
	Business and occupation tax is too high

Business environment and the city is doing the right thing.
business friendly
Business friendly
business friendly compared to Seattle
Business Oriented
business-friendly
Businesses are thriving from what I can see and the price is going up
Business grow up
busy
careful, thought-out policy
Chinese population
city council
City planning
Clean
clean environment
Clean Safe
clean, people friendly, few homeless
clean, safe
Clean, safe, growing
Community, Parks
constantly changing
Continued growth
Continues to provide a great environment for small businesses.
Continuing reinvestment
controlled growth
controlling growth, expanding green areas
convenience
cost of living, etc.
Creating and improving infrastructure
curb appeal
Current

Current and up to date
Decent People
Developed too fast
development
Development
Development/public transportation
discerned planning
diverse community
Diverse population. Growing population. Big businesses in town.
diversity
diversity of businesses
Doing great!
Downtown housing
Easier for small business owners
Easy
Easy access for online information
Economic growth
economic stability
economy
ECONOMY
embrace diversity
Embracing Innovation. Future oriented.
Encouraging growth
everything works
Fast progressive development.
Feeling
focused on business growth
forward thinking
Forward thinking
Forward Thinking
Forward Thinking

Fostering business growth and expansion
Future looking
Get in touch with Fire Dept. when I needed to.
good
Good atmosphere
good balance
Good Community
Good Environment
Good infrastructure
good partner, responsive
Good planning
Good security
Great Business Opportunity
great city
great client base
great economy
Great education system attracts lots of people
Great potential
Grew up here and don't wish to leave.
growing
Growing at a great rate.
growing economic
Growing Fast
Growing population
Growing quickly and upscale
Growing significantly
growth
Growth
GROWTH
Growth and Business friendly
Growth and Talent

Growth anticipation
Growth Availability
Growth development
Growth in the city.
Growth Jobs
Growth minded
Growth of the city
growth planning
Highly educated
homeless shelter
I don't feel that Bellevue is embracing alternative transportation such as bicycling as much as other surroundings cities.
I don't know
I don't know.
Improvements in roads & transportation
Improving Infrastructure
infrastructure changes that are occurring
infrastructure improvements attracting more larger businesses
Investment and infrastructure.
it is hard to start business in Bellevue especially restaurants
It's a good place for business; could use more low-income housing though
jobs and safety of the community
Lack of information
laissez faire
Light Rail
Light rail Stupid
Limited fees
livability
location
LOCATION
Location, amenities
Location, demographics, infrastructure

Logical
looking down stream
manage their growth responsibly
Many businesses are around the Bellevue area.
Mass Transit
mass transit is unnecessary and is going to ruin our city
Mass transportation, crime is low and access to customers for our business.
mindfulness of businesses
mixed used development, transit
Modernization
more business, better lifestyle
more opportunities
More opportunity
na
Need information
new construction
New Construction
new construction, improved roads
No concerns
No homeless camps
no support for small business
no taxes on small business
Not as liberal as Seattle
not sure honestly
Not sure. I have nothing to compare it with.
online taxes
opportunity
Opportunity
Organization
overcrowding and expenses
Overall growth

Overall growth of Bellevue
Parking
parks
people centric
permitting
Planed Growth
planning
planning ahead
planning is evident
Planning!
Population & Traffic
Population and location
Population growth, room for development
positive economic atmosphere
Presentable
progressive
Progressive
Progressive Improvements
progressive policies
progressive, new buildings
Proper priorities
protect small business
Public transportation
puts businesses before people who live in Bellevue
Quality businesses
Quick growth
rapid development
Reasonable Tax Structure
red tape
Regional hub
reliable services

Responsiveness
Retail
Rigid
Road improvement
Safety first
Safety, services
SES, Money
Significant growth
Small business and big business friendly
Small business friendly
small business tax waive
Small businesses are difficult
Smart density mixed usage business and living
Sound Transit
staying relevant
steady growth
Stimulating more Economic Growth.
Strong economy.
strong growth
successful growth
Support Growth
supports small businesses and multicultural
Sustainable Development
takes great care of parks and public facilities
Taxes are high
taxes are quite high
Tech Economy
Tech industry
The city is booming
The city is thriving
The growth.

The only issue I have is the massive amounts and development and construction; I'm always afraid my landlord is going to tear down our building and it makes me not want to invest in it as much

Their response time is very efficient

They are updating their systems to be more modern.

They have good customer service.

They work well with small businesses.

Things are ok

Thoughtful development

too expensive

Too expensive

Too much development

Traffic concerns

traffic control

traffic gridlock

transportation

Transportation

Transportation and housing

transportation improvement

Un-affordable housing

Upgrades progress

upward moving

uses technology convenient

very safe

vibrant growth

Vision

visionary planning

walking score and housing

Website friendly and people friendly and helpful. you get a live person over recordings

well balanced

well maintained

Yes

zoning

Open Ended Responses to BNWRG4_A: Why do you think Bellevue is **not** headed in the right direction

Reasons Bellevue is not Headed in the Right Direction												
	Overall (n=300)		Business Services (n=84)		Information Technology (n=27)		Retail (n=36)		Tourism (n=16)		Other (n=137)	
Unmanaged growth or development/overcrowding	49	16%	17	20%	2	7%	4	11%	1	6%	25	18%
Traffic	38	13%	10	12%	2	7%	4	11%	3	19%	19	14%
Cost/Expensive	30	10%	5	6%	2	7%	6	17%	3	19%	14	10%
Taxes	22	7%	8	10%	8	30%	0	0%	0	0%	6	4%
Regulations/Red Tape/ Bureaucracy	19	6%	4	5%	0	0%	6	17%	0	0%	9	7%
Unfriendly to small/local business	13	4%	5	6%	2	7%	1	3%	0	0%	5	4%
Not helpful	8	3%	1	1%	0	0%	2	6%	1	6%	4	3%
Light Rail	6	2%	1	1%	1	4%	1	3%	1	6%	2	1%
Public Transit/Transportation	5	2%	2	2%	1	4%	0	0%	0	0%	2	1%
Growth/development	4	1%	1	1%	0	0%	0	0%	0	0%	3	2%
Infrastructure	4	1%	1	1%	0	0%	0	0%	1	6%	2	1%
Location/Convenient	4	1%	2	2%	0	0%	0	0%	0	0%	2	1%
Unaware of services provided by City	3	1%	0	0%	0	0%	0	0%	0	0%	3	2%
Variety/Diversity	2	1%	0	0%	1	4%	1	3%	0	0%	0	0%
Traditional/Old	2	1%	1	1%	0	0%	0	0%	0	0%	1	1%
Future/forward thinking/Proactive Leadership/Progressive	1	0%	0	0%	0	0%	0	0%	0	0%	1	1%
Business Friendly/Economy	1	0%	1	1%	0	0%	0	0%	0	0%	0	0%
Safe	1	0%	0	0%	0	0%	0	0%	1	6%	0	0%
Helpful/Supportive/Responsive/Friendly/Positive	1	0%	0	0%	1	4%	0	0%	0	0%	0	0%
Well managed/Well Planned	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%
Clean/Environment/Quality of Life	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%
Easy/Access to Services/Amenities	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%
Density	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%
Tech Industry	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%
Other	69	23%	19	23%	5	19%	8	22%	6	38%	31	23%

Reason for Bellevue headed in the right or wrong direction.

Business Services

??
antiquated technology
Arrogance, ignorance
average
businesses location doesn't affect me business series
changing building codes
changing character
City Tax is tough on small business, congestion
congestion
congestion...light rail...high cost of rent
convenience
cost for space
Costs too high to stay in Bellevue
Crowding Traffic
deadpan actions
Downtown over developed
expensive
focused on large companies
gentrification
growing too fast
Growth management
Growth too fast for infrastructure; density should be slowed or paused, but instead, further density is being pushed.
Growth seems uncoordinated
gut reactions
High Taxes
homeless policy
I am but a wage slave.
I am concerned about infrastructure and roads development matching the speed of population growth.
I am neutral, I like Bellevue for the location but don't think too much about other aspects of having a business here.



I am out of state; only making comparison from an administrative view.
I operate a home business, so I also live in Bellevue. I feel like business interests often take precedence over concerns of the residents (e.g. low barrier men's shelter in Eastgate vs Spring District, etc.).
If the taxes are going up
imbalanced taxation
Inadequate planning for traffic growth & accommodating pedestrians.
Just do
lack knowledge
Lack of housing diversity
lack of interaction with city
Limited Benefits
Little Parking
Luck of Information
Mass transit
minimal experience with City Services for Businesses
more regulations
n/a
need a N/A button
No essay questions
no knowledge of other towns
no opinion
no support
not enough info to answer
Not Enough Information
Not future thinker
Not small business friendly
Not supportive of artist.
not sure
not sustainable
over commercialism
Over regulation.
over-priced

	overdevelopment
	overdevelopment in residential areas
	Packed Congestion
	Parking
	Rapid Growth
	Tax Perspective only- not at physical location
	taxation
	taxes too high
	to fast, the city is not keeping up
	Too much attention to corporate businesses with little support for independent local businesses.
	Too big
	too high density residential
	too much growth
	Too much traffic; 3-person toll in I405 and so very difficult to travel through Bellevue for a number of hours in the day.
	traffic
	Traffic congestion
	Transit mess and too many skyscrapers
	unmanaged growth
	unrestrained growth
	you're kidding
	Your business excise tax is too high for small business
	zoning restrictions
Information Technology	Ambivalence
	average for WA cities
	city taxes
	density
	Don't have comparison to other cities
	downtown needs parks
	growing taxes
	Growing too fast... Too much traffic
	growth issues

	haven't had any interactions
	high rents, bad traffic
	high taxes
	High taxes
	I don't know.
	just fine
	Lack of integrated support for business
	Lack of tax integration with Washington state
	light rail
	NOT RELEVANT
	pushing out small businesses
	Reasons???
	sales tax and B&O tax is onerous
	taxes
	taxes but no services
	Too many people driving up real-estate prices.
	Transportation
	we operate only in Bellevue, can't actually compare
Retail	A significant lack of public parking options hinder commerce for small business
	about average
	Construction
	crowded, expensive
	Culture
	Employees can't afford to live here, developers catered to at every other business/residence expense
	Experience
	extreme bureaucratic oversight
	Foreign Population
	Greed
	Help small biz. instead of impeding it and fix traffic issues get rid of foreigners who don't pay taxes and clog streets and strain services taxpayers pay for
	high density living
	Inflated Market

	It was difficult to find out exactly what I needed to do to get my LLC register.
	It's becoming too expensive for small business to succeed in Bellevue
	Light Rail
	Many challenges
	mediocrity
	Need > 1-2
	no comment
	no experience in other cities
	No help or hindrance
	No interaction with city of Bellevue
	not sure
	Over populated and traffic horrible!
	Over regulation
	permitting process
	Permitting, zoning, regulation
	Red tape
	Too autocratic
	too expensive
	Too Expensive
	too much like Seattle
	Traffic
	Traffic issues
	Traffic Management
Tourism	Direction unknown
	high rent, traffic, parking
	Homeless shelter and park and ride fiasco
	I don't have any opinion
	I'm a very small business
	Lack of Interaction
	Light rail toll lanes
	More affordable

	not enough experience in other cities, no comparisons
	Not preserving greenspace.
	Not safe
	road construction
	The city has very little help for the small
	The rent is going up
	Traffic control, pedestrian access and walkability with inadequate crossings. Not enforcing the Chick f let blocking traffic on 116th, poor traffic enforcement - u turns are happening with alarming frequency and at heavily congested intersections. Need to time the traffic lights along NE 4th - those entrances to the freeway are so heavily congested that they are becoming dangerous with cars blocking intersections
	Traffic, Overdelopement, Rodeo Drive'esque
Other	Access and traffic
	average
	Bad traffic-too much residential construction
	Becoming an extension of absurd political correctness and socialism spreading like a disease from Seattle. The homeless shelter is a perfect example of Seattle miscreants being dumped in Bellevue.
	Becoming more like Seattle
	beurocracy
	Big money
	Bureaucracy
	Business services?
	Business Taxes & Regulations
	can't really compare
	Catering to wealthy businesses
	congestion
	Congestion and Corporate Crackerboxes
	construction
	Convenient
	cost of doing business increasing too much
	Crowding out small mom and pop business like mine.
	cutting of trees, high rents, congested
	define "direction"
	Development

discouraging business
don't know
Don't know
don't know
downtown corridor too congested
elf-employed at home office
Excessive development
Expensive real estate
expensive to do business
Few benefits for small business
Grow poorly planned
Growing too fast
growth means heavy traffic
growth overwhelming for city, pricing locals out
Growth without government change
High cost
high fees
higher tax
Home based business. No special services required.
Homeless problem affects our business
housing and traffic
Housing is too expensive for young families; foreign investors buying up most homes in my area, driving up prices. Homes are sitting vacant causing issues with yard/maintenance neglect, etc.
I am indifferent.
I am unaware of anything the City of Bellevue is doing that is either significantly positive or significantly negative with respect to businesses in Bellevue.
I cannot compare to other cities.
I choose neutral because I don't know the answers to these questions. I don't know about services offered nor can I compare it
I do not feel benefited for or discriminated against anything
I don't think about the city as part of my business. It's just where I have my office.
I have nothing good or bad to say

I really have not had much interaction with the City of Bellevue, other than to get my license renewed. I am a small in-home preschool.
I think it is growing much too fast.
I'm a forensic psychologist, and work mostly out of my home office (my home is in Bellevue). Virtually all of my clinical work takes place in courts and correctional facilities around the country. I've never operated a business anywhere other than in Bellevue, so I'm not able to compare my experience doing this in Bellevue to what it might be like to have a home office in another city.
I'm less than 5yrs into business, and am unfamiliar with other cities ordinances
I'm okay with progress
Infrastructure inadequate
intuition
It is just my feeling
It seems the same as other cities. Too hard to build, permits take too long, etc. Not better or worse than other cities.
Just after the money.
Labor shortage
less bureaucracy red tape
Light rail
limiting traffic and parking
Lots of overhead
Mixed experience
Myopic
NA was unavailable
Need better parking for patrons
needless Beaurocracy
no comparison
no idea
no information
No opinion
No Room for Growth
No thanks
none
Nor come dispatch

not applicable
Not business friendly
Not helpful.
not interested in this survey
Not many business activities
nothing to compare to
overcrowded; not walkable environment
Overcrowding, increased traffic
over development
Over development
Over Development
over growth
Overpriced
overregulated
Overregulation
People due to being well off feel they are entitled.
Poor planning
poor urban development and access
property improvement
raised taxes
Rent prices are really going up
road infrastructure
STREET PARKING
taxes
Taxes are high but not min wage not as high as Seattle.
Taxes regulations.
terrible traffic
The man's shelter would not be close to school zone.
There is too much construction.
There is too much housing being built, without upgrades to the traffic. This is causing significant transportation challenges.
They don't always address problems like homeless, traffic, transportation. Not a good job at that.

Too expensive, and too picky
Too crowded
too expensive
Too many restrictions
Too much density
too much development and traffic
Too Much Growth
too vague
Traffic
Traffic and construction
traffic gridlocks
Traffic, no one cares, theft
Traffic!!!
Traffic. Light rail won't help in my working lifetime
Transportation issues
two words are not enough
unaffordable
uncertainty
uncontrolled growth
unknown
Unmanageable growth
unusable website
Very few convenience store and low-cost services
Very slow
Wrong focus

APPENDIX VI—QUESTIONNAIRE

City of Bellevue, 2017 Business Survey
 NWRG Project Number: BEL_ 2017_Business

DATE LAST MODIFIED:
04/17/2017

TEXT CONVENTIONS

TESTING LINK: http://survey.confirmit.com/extwix/test_p3075308012.aspx?_etk=JGZBJHCPFMEN

BOLD, PURPLE TEXT DENOTES STYLE-GUIDE INSTRUCTIONS

BOLD, RED TEXT DENOTES PROGRAMMING INSRUCTIONS

BOLD, GREEN TEXT DENOTES INTERVIEWER INSTRUCTIONS, TO BE DISPLAYED FOR PHONE ONLY

TEXT IN ALLCAPS IS NOT READ TO RESPONDENTS

Text in Red highlight indicates deleted question / response

Text in Green highlight indicates new question / response

Text in Yellow highlight indicates question is still being considered in conjunction with the client

WEB PROGRAMMING INSTRUCTIONS

Do not show “DON’T KNOW” or “PREFER NOT TO ANSWER” response options unless respondent attempts to skip question

Show “PREFER NOT TO ANSWER” instead of “DON’T KNOW”

Show “unread” response options, and use Sentence Case (Capitalize first letter of word / phrase only)

Rating scales must be shown in the format below

	Much Worse Than Other Communities	0	1	2	3	4	5	6	7	8	9	Much Better Than Other Communities
Easy to get around by car		○	○	○	○	○	○	○	○	○	○	○

Public transportation available to where I need to go	<input type="radio"/>										
---	-----------------------	-----------------------	-----------------------	-----------------------	-----------------------	-----------------------	-----------------------	-----------------------	-----------------------	-----------------------	-----------------------

INTRODUCTION AND SCREENING QUESTIONS
 [BASE: ALL]
 [PROGRAMMING: SECTION FOR TIMING]

[DISPLAY FOR PHONE RESPONDENTS ONLY]

INTROTEL [PHONE NOTATION] (REREAD THIS SCREEN IF YOU HAVE A NEW RESPONDENT ON THE PHONE, OTHERWISE PRESS >> TO GET INTO THE SURVEY)

Hello. This is _____ with **Northwest Research Group**, calling on behalf of the City of Bellevue.

May I please speak with the person who is responsible for the overall management and direction of your company at this location within the City of Bellevue?

[AS NEEDED] This person typically has a title such as owner, president, senior manager, etc.

[PROBE TO BE TRANSFERRED TO THAT PERSON]

- 00 NO **[SCHEDULE CALL-BACK]**
- 01 YES – IS THAT PERSON
- 999 **(DO NOT READ)** DON'T KNOW/PREFER NOT TO ANSWER

[ONCE PERSON ON LINE]

Let me assure you that this is not a sales call.

We are conducting a survey among Bellevue businesses and are asking that your business participate in this important survey.

Your responses will help Bellevue better meet the needs and expectations of businesses in the City, decide how to best use its resources, and set goals. Everything you say will be kept strictly confidential. This call may be monitored and/or recorded for quality control purposes.

[IF NECESSARY: Your phone number has been randomly chosen for this study.]

[IF NECESSARY: We know your time is valuable, the survey should only take about 10 minutes of your time and will greatly help the City of Bellevue improve services for businesses in the city.]

[DISPLAY FOR WEB RESPONDENTS ONLY]

INTROWEB Thank you for agreeing to complete this important survey for the City of Bellevue. Your input will be used to improve services to the community.

All businesses in Bellevue have been asked to participate in this survey. Your participation is vital to the success of this research so please take a few minutes of your time to complete this survey. Your responses will help Bellevue better meet the needs and expectations of businesses in the City, decide how to best use its resources, and set goals. Please note that all of your responses will be kept strictly confidential.

SCR1 Does your business have a physical location in Bellevue?

00 NO **[SKIP TO THANK1]**

01 YES

999 **(DO NOT READ)** DON'T KNOW/PREFER NOT TO ANSWER **[SKIP TO THANK2]**

SCR2 Which of the following best describes your position within your company? **[PHONE NOTATION] (READ LIST)**

01 Business owner

02 C-Level position (CEO, COO, CXO)

03 Manager

04 Administration / Clerical

05 Other **(SPECIFY)**

998 **(DO NOT READ)** DON'T KNOW

999 **(DO NOT READ)** PREFER NOT TO ANSWER

OVERALL RATINGS
 [BASE: ALL]
 [PROGRAMMING: SECTION FOR TIMING]

BNWRG2 From what you have experienced, seen, or heard, compared with other cities and towns, how would you rate Bellevue as a place to operate a business? Use a scale from 0 to 10 where “0” means “Significantly worse than other cities and towns” and “10” means “Significantly better than other cities and towns.” **(IF DON’T KNOW/PREFER NOT TO ANSWER – PROBE FOR ANSWER BEFORE USING THIS OPTION) Please use your best estimate there are no right or wrong answers.**

Significantly Worse Than Other Cities And Towns											Significantly Better Than Other Cities And Towns
0	1	2	3	4	5	6	7	8	9	10	

998 **(DO NOT READ)** DON’T KNOW / NOT FAMILIAR WITH OTHER CITIES AND TOWNS

999 **(DO NOT READ)** PREFER NOT TO ANSWER

BNWRG3 Using a scale from 0 to 10 where “0” means “Does Not Meet Expectations at All” and “10” means “Greatly Exceeds Expectations”, how would you rate the overall quality of services provided to businesses by the City of Bellevue? **(IF DON’T KNOW/PREFER NOT TO ANSWER – PROBE FOR ANSWER BEFORE USING THIS OPTION) Please use your best estimate there are no right or wrong answers.**

Does Not Meet Expectations At All											Greatly Exceeds Expectations
0	1	2	3	4	5	6	7	8	9	10	

998 **(DO NOT READ)** DON’T KNOW

999 **(DO NOT READ)** PREFER NOT TO ANSWER

BNWRG4_1 Using a scale from “0” to “10” where “0” means “Strongly headed in the wrong direction” and 10 means “Strongly headed in the right direction”, overall, would you say that Bellevue is headed in the right or wrong direction? **(IF DON’T KNOW/PREFER NOT TO ANSWER – PROBE FOR ANSWER BEFORE USING THIS OPTION) Please use your best estimate there are no right or wrong answers.**

Strongly Headed In The Wrong Direction											Strongly Headed In The Right Direction
0	1	2	3	4	5	6	7	8	9	10	

PROGRAMMING NOTE FOR BNWRG4_A:
 IF NWRG4_1 < 5 DISPLAY “think Bellevue is headed in the wrong direction”
 IF NWRG4_1 = 05, 06 DISPLAY “feel this way”
 IF NWRG4_1 > 06 AND < 98 DISPLAY “think Bellevue is headed in the right direction”
 IF NWRG4_1 = 98, 99 SKIP TO BNWRG4_2

BNWRG4_A. Using a **one or two word phrase**, what are the reasons why you **[INSERT TEXT FROM LOGIC ABOVE]**?

[OPEN END] [OPEN END – DO NOT PROBE]

BNWRG6 Think about the taxes you pay in Bellevue and the services you receive from the City. Using a scale from 0 to 10 where “0” means “a very poor value” and “10” means “an excellent value”, what value do you feel you receive for your money?
(IF DON’T KNOW/PREFER NOT TO ANSWER – PROBE FOR ANSWER BEFORE USING THIS OPTION) Please use your best estimate there are no right or wrong answers.

VERY POOR VALUE										EXCELLENT VALUE
0	1	2	3	4	5	6	7	8	9	10

- 998 **(DO NOT READ)** DON’T KNOW
- 999 **(DO NOT READ)** PREFER NOT TO ANSWER

OPEN1 What would you say is the single most important business related issue in Bellevue? **[OPEN END]**

- 998 **(DO NOT READ)** DON’T KNOW
- 999 **(DO NOT READ)** PREFER NOT TO ANSWER

COMMUNITY CHARACTERISTICS
 [BASE: ALL]
 [PROGRAMMING: SECTION FOR TIMING]

CC1_INT From what you have experienced, seen, or heard, compared with other cities and towns, how would you rate Bellevue on each of the following items? Use a scale from 0 to 10 where “0” means “Significantly worse than other cities and towns” and “10” means “Significantly better than other cities and towns.”
(IF DON’T KNOW/PREFER NOT TO ANSWER – PROBE FOR ANSWER BEFORE USING THIS OPTION) Please use your best estimate there are no right or wrong answers.

[RANDOMIZE ORDER SHOWN CC1_1 THORUGH CC1_12]

- CC1_1 Physical appearance of the area where your business is located
- CC1_2 Development services related to permitting and licensing
- CC1_3 Utility costs
- CC1_4 Extent to which vehicle traffic affects your business
- CC1_5 Access to public transportation services
- CC1_6 Parking availability for employees
- CC1_7 Ability to safely get around town by walking or biking
- CC1_8 Availability of qualified employees that fit the needs of your business
- CC1_9 Access to continuing education opportunities
- CC1_1 Overall feeling of safety
- 0
- CC1_1 Quality of Police and Emergency Medical Services
- 1
- CC1_1 Range of affordable housing options for employees
- 2

Significantly Worse Than Other Cities And Towns	1	2	3	4	5	6	7	8	9	Significantly Better Than Other Cities And Towns
0	1	2	3	4	5	6	7	8	9	10

998 **(DO NOT READ)** DON'T KNOW
 999 **(DO NOT READ)** PREFER NOT TO ANSWER

CC2 Using a scale from 0 to 10 where “0” means “Not At All Satisfied” and “10” means “Extremely Satisfied”, please tell me how satisfied are you with the customer service you receive when dealing with your Bellevue business Taxes?

Not At All Satisfied											Extremely Satisfied
0	1	2	3	4	5	6	7	8	9	10	

- 997 (DO NOT READ) DOES NOT APPLY / HAVE NOT DEALT WITH CUSTOMER SERVICE
- 998 (DO NOT READ) DON'T KNOW
- 999 (DO NOT READ) PREFER NOT TO ANSWER

BUSINESS CLIMATE
 [BASE: ALL]
 [PROGRAMMING: SECTION FOR TIMING]

BC1 From what you have experienced, seen, or heard, compared with other cities and towns in the Puget Sound region, how would you rate the current state of Bellevue’s economy? Use a scale from 0 to 10 where “0” means “Significantly worse than other Puget Sound communities” and “10” means “Significantly better than other Puget Sound communities.”

Significantly Worse Than Other Puget Sound Communities											Significantly Better Than Other Puget Sound Communities
0	1	2	3	4	5	6	7	8	9	10	

- 998 (DO NOT READ) DON'T KNOW
- 999 (DO NOT READ) PREFER NOT TO ANSWER

BC2 Overall, how would you rate the economic strength of your business? Use a scale from 0 to 10 where “0” means “Very Weak” and “10” means “Very Strong.”

Very Weak											Very Strong
0	1	2	3	4	5	6	7	8	9	10	

- 998 (DO NOT READ) DON'T KNOW
- 999 (DO NOT READ) PREFER NOT TO ANSWER

BC3 Thinking about the next 3 to 5 years, do you feel the economic strength of your business will. . . ?
 [PHONE NOTATION] (READ LIST)

- 01 Slow down significantly
- 02 Slow down somewhat
- 03 Stay the same
- 04 Improve somewhat
- 05 Improve significantly
- 998 (DO NOT READ) DON'T KNOW
- 999 (DO NOT READ) PREFER NOT TO ANSWER

BC4 **[DISPLAY FOR WEB RESPONDENTS ONLY]** Please indicate below any anticipated changes in your business over the next 12 months.
[DISPLAY FOR PHONE RESPONDENTS ONLY] Please tell me if you anticipate any of the following aspects of your business to increase or decrease over the next 12 months.

Would that be some increase/decrease or a significant increase/decrease?

	Significant Decrease	Some Decrease	No Change	Some Increase	Significant Increase
BC4_1 Number of Employees based in Bellevue	1	2	3	4	5
BC4_2 Capital Expenditures	1	2	3	4	5
998	(DO NOT READ) DON'T KNOW				
999	(DO NOT READ) PREFER NOT TO ANSWER				

WORKFORCE DEVELOPMENT
 [BASE: ALL]
 [PROGRAMMING: SECTION FOR TIMING]

ASK BC5 IF BC4_1 > 03

BC5 What type of employees do you intend to hire?

[SELECT ALL THAT APPLY]

[MULTIPLE SELECT]

- BC5#1 Professional/Managerial
- BC5#2 Engineers, Scientists and Technicians
- BC5#3 Office and Administrative
- BC5#4 Information Technology
- BC5#5 Arts, Design and Other Creative
- BC5#6 Healthcare Related
- BC5#7 Customer Service / Sales
- BC5#8 OTHER **(SPECIFY)**
- BC5#998 **(DO NOT READ)** DON'T KNOW
- BC5#999 **(DO NOT READ)** PREFER NOT TO ANSWER

ST3 Where is your employee talent pool located?

(READ LIST IF NECESSARY)

- 01 Bellevue
- 02 Elsewhere in the Puget Sound region
- 03 Washington State
- 04 Nationally / Other US States
- 05 Internationally
- 998 **(DO NOT READ)** DON'T KNOW
- 999 **(DO NOT READ)** PREFER NOT TO ANSWER

ST7 Have you had difficulty finding trained and/or qualified staff in the past 12 months?

- 00 NO
- 01 YES
- 998 **(DO NOT READ)** DON'T KNOW
- 999 **(DO NOT READ)** PREFER NOT TO ANSWER

BROADBAND FOR BUSINESS
 [BASE: ALL]
 [PROGRAMMING: SECTION FOR TIMING]

BB1 Which of the following services does your business currently have?

(READ LIST)
[MULTIPLE SELECT]

- BB1#1 Internet Access
- BB1#2 Cable or satellite television
- BB1#3 Fixed (landline) telephone service
- BB1#4 Cellular/mobile telephone service
- BB1#5 V-O-I-P telephone service
- BB1#6 **(DO NOT READ)** NONE OF THE ABOVE
- BB1#998 **(DO NOT READ)** DON'T KNOW
- BB1#999 **(DO NOT READ)** PREFER NOT TO ANSWER

BB2 **[DISPLAY IF BB1#1=YES]** Does your existing internet or wireless speed/bandwidth meet your current needs?

- 00 NO
- 01 YES
- 998 **(DO NOT READ)** DON'T KNOW
- 999 **(DO NOT READ)** PREFER NOT TO ANSWER

BB3 **[ASK BB3 IF BB2=01]** In the next two to three years, will your existing internet or wireless speed meet your business needs?

- 00 NO
- 01 YES
- 998 **(DO NOT READ)** DON'T KNOW
- 999 **(DO NOT READ)** PREFER NOT TO ANSWER

SPECIAL TOPICS
[BASE: ALL]
[PROGRAMMING: SECTION FOR TIMING]

ST1 Does your business offer employees incentives to encourage the use of alternative modes of transportation such as public transit, walking or bicycling? **[AS NEEDED: This includes things like bus passes, bicycle parking, lockers, showers, etc.]**

- 01 **(DO NOT READ)** YES
- 02 **(DO NOT READ)** NO
- 998 **(DO NOT READ)** DON'T KNOW
- 999 **(DO NOT READ)** PREFER NOT TO ANSWER

ASK ST1A IF ST1=02 (NO)

ST1A How likely is your business to begin offering employee incentives within the next two years to encourage alternative modes of transportation? Use a scale from 0 to 10 where "0" means "not at all likely" and "10" means "very likely".

Not at all likely											Very likely
0	1	2	3	4	5	6	7	8	9	10	

- 998 **[DO NOT SHOW]** DON'T KNOW
- 999 **[DO NOT SHOW]** PREFER NOT TO ANSWER

ST9 Where do you sell your goods and services?

[SELECT ALL THAT APPLY]

(READ LIST IF NECESSARY)

- 01 Bellevue
- 02 Elsewhere in the Puget Sound region
- 03 Washington State
- 04 Nationally / Other US States
- 05 Internationally
- 998 **(DO NOT READ)** DON'T KNOW
- 999 **(DO NOT READ)** PREFER NOT TO ANSWER

ASK ST9A IF ST9=05 (INTERNATIONALLY)

ST9A In which international markets do you sell your goods and services?

[SELECT ALL THAT APPLY]

- 01 Asia
- 02 North America
- 03 South America
- 04 Africa
- 05 Europe
- 06 Australia / Oceania
- 07 Other (specify) _____
- 998 **(DO NOT READ)** DON'T KNOW
- 999 **(DO NOT READ)** PREFER NOT TO ANSWER

ASK ST9B IF ST9=05 (INTERNATIONALLY)

ST9B Have you received help to sell your products internationally, like market research, export financing, or participating in official trade delegations?

- 01 **(DO NOT READ)** YES
- 02 **(DO NOT READ)** NO
- 998 **(DO NOT READ)** DON'T KNOW
- 999 **(DO NOT READ)** PREFER NOT TO ANSWER

ST10 Where are the majority of your suppliers located?

[SELECT ALL THAT APPLY]

(READ LIST IF NECESSARY)

- 01 Bellevue
- 02 Elsewhere in the Puget Sound region
- 03 Washington State
- 04 Nationally / Other US States
- 05 Internationally
- 998 **(DO NOT READ)** DON'T KNOW
- 999 **(DO NOT READ)** PREFER NOT TO ANSWER

ST5 Which of the following factors will have the single biggest impact on your business in the next three to five years?

(READ LIST) [SINGLE RESPONSE ONLY]

- 01 Energy prices
- 02 Workforce
- 03 Transportation
- 04 Internet Access/ Broadband Connectivity
- 05 Business regulations
- 06 Business and Occupation Tax
- 07 Environment
- 08 Other **(SPECIFY)**
- 998 **(DO NOT READ)** DON'T KNOW
- 999 **(DO NOT READ)** PREFER NOT TO ANSWER

ST6 **[ASK IF ST5<998]** When thinking about how **[INSERT ANSWER FROM ST5]** will impact your business over the next few years, do you believe that the impact will be . . .

(READ LIST)

- 01 Greatly positive
- 02 Somewhat positive
- 03 Neither positive nor negative
- 04 Somewhat negative
- 05 Greatly negative
- 998 **(DO NOT READ)** DON'T KNOW
- 999 **(DO NOT READ)** PREFER NOT TO ANSWER

ADVOCACY
 [BASE: ALL]
 [PROGRAMMING: SECTION FOR TIMING]

ADV1 Using a scale from 0 to 10 where “0” means “Not at all likely” and “10” means “Extremely Likely,” how likely are you to recommend starting a business in Bellevue?

Not At All likely											Extremely Likely
0	1	2	3	4	5	6	7	8	9	10	

- 998 (DO NOT READ) DON'T KNOW
- 999 (DO NOT READ) PREFER NOT TO ANSWER

BUSINESS DEMOGRAPHICS
 [BASE: ALL]
 [PROGRAMMING: SECTION FOR TIMING]

DEMO1 In what year was your business established in Bellevue?

____ ENTER YEAR [REQUIRE 4 CHARACTERS]

DEMO2 Does your company currently own or lease the space it occupies in Bellevue?

[SELECT ALL THAT APPLY]
 [MULTIPLE SELECT]

- 01 OWN
- 00 LEASE
- 998 (DO NOT READ) DON'T KNOW
- 999 (DO NOT READ) PREFER NOT TO ANSWER

DEMO3 Not including this location, how many other locations does your business have in Bellevue?

- ____ ENTER NUMBER
- 998 (DO NOT READ) DON'T KNOW
- 999 (DO NOT READ) PREFER NOT TO ANSWER

ASK DEMO4 IF NAICS_DESCRIPTION=999

DEMO4 In which industry (business sector), your business is in?

- | Goods Producing | | Service Providing | |
|------------------------|--------------------------|--------------------------|-----------------------------------|
| 01 | Construction | 04 | Finance & Insurance |
| 02 | Manufacturing | 05 | Healthcare |
| 95 | Other (Specify) | 06 | Information Technology |
| | | 07 | Leisure & Hospitality |
| | | | Arts, Entertainment, Recreation |
| | | | Accommodations & Food Service |
| | | 08 | Professional Business Services |
| | | 09 | Real Estate |
| | | 10 | Retail Trade |
| | | 11 | Wholesale Trade |
| | | 96 | Other Services (SPECIFY) |

DEMO5 How many employees does your business have in each of the following categories?

- ___ Full-Time
- ___ Part-Time
- ___ Contractors
- ___ Other
- 998 **(DO NOT READ)** DON'T KNOW
- 999 **(DO NOT READ)** PREFER NOT TO ANSWER

THANKS

THANKEND Thank you very much for your time. Your participation will assist the City of Bellevue.

[PHONE NOTATION] (INTERVIEWER: CODE IN CATI AS “COMPLETE”)

[WEB NOTATION] *You may now close your browser window.*

THANK1 I'm sorry, but we are currently only surveying businesses physically located in Bellevue. Have a good day/evening.

[PHONE NOTATION] (INTERVIEWER: CODE IN CATI AS “NQ OUT OF AREA”)

[WEB NOTATION] *You may now close your browser window.*

THANK2 I'm sorry, but we cannot continue without that information. Have a good day/evening.

[PHONE NOTATION] (INTERVIEWER: CODE IN CATI AS “SCREENER REFUSAL”)

[WEB NOTATION] *You may now close your browser window.*

[THESE SHOULD NOT FACTOR INTO THE INCIDENCE FORMULA]

THANK3 Thank you, those are all of the questions I have.

[PHONE NOTATION] (INTERVIEWER: CODE IN CATI AS “NQ TERM: AGE”)

[WEB NOTATION] *You may now close your browser window.*