



2015 Bellevue Survey of Businesses

Final Report

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Northwest Research Group, LLC

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EXECUTIVE SUMMARY

BACKGROUND AND METHODOLOGY

This is the first comprehensive survey of businesses located within Bellevue conducted by the City of Bellevue. 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 2015 business survey was conducted between September 28 and November 8, 2015 and resulted in a total of 917 interviews—147 completed over the telephone and 770 completed via the Web.

KEY METRICS

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

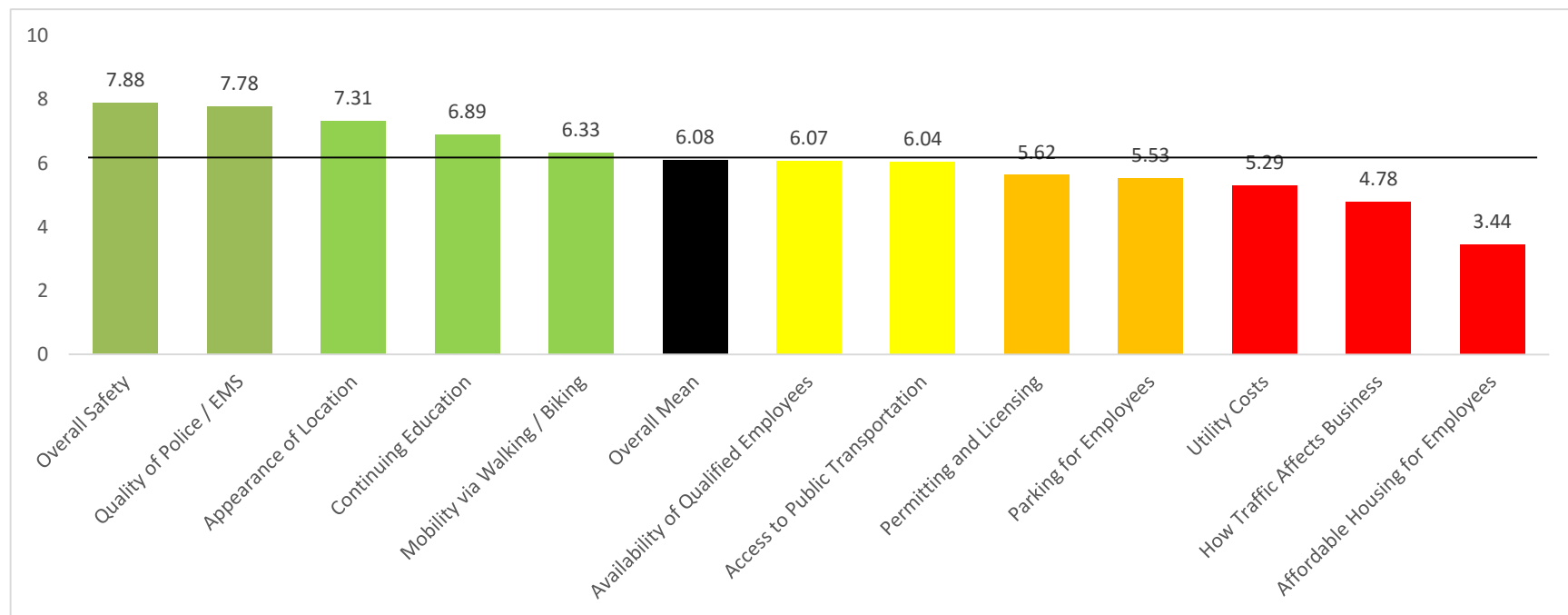
- More than 7 out of 10 businesses feel that Bellevue is a “somewhat” or “significantly” better place to operate a business when compared to other cities.
 - However, Businesses in the Retail and Tourism sectors are twice as likely as other businesses to claim that Bellevue is worse than other cities and towns.
- Overall, 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.
 - There is a general trend based on age of business with newer businesses being more likely than older businesses to feel that that Bellevue is headed in the right direction
- Sixty percent (60%) feel that they are getting their money’s worth for the tax dollar paid.
 - Small businesses—those with one to five employees—are the most likely to feel they are getting their money’s worth.
- Issues relating to traffic, parking, and congestion are the most commonly mentioned business related issues facing Bellevue over the next several years.
 - Traffic is mentioned more often among businesses in Bel-Red/SR-520 and Downtown than other areas.
- Over half (57%) of businesses state they are likely to recommend starting a business in Bellevue with small businesses being the most likely to provide a recommendation.
- Nearly all (92%) of businesses feel that the strength of Bellevue’s economy is better than that of other cities in the Puget Sound Region.

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 6.08 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 performs better than other cities and towns in areas focused around safety and appearance. Bellevue is underperforming in areas regarding traffic and affordability.

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 (n=917)

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

BUSINESS HEALTH

Eighty percent (80%) of businesses state that the economic strength of their business is “somewhat” or “very” strong.

Sixty-two percent (62%) of businesses indicated they expect the economic strength of their business to improve over the next three to five years.

The majority 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 rather than a decrease.

Overall, the majority of business competitors are located regionally – either in Bellevue or elsewhere in the Puget Sound.

Overall, 21 percent of businesses say the majority of their future suppliers will be located in Bellevue. Twenty-seven percent (37%) say their suppliers will be elsewhere in the Puget Sound and one-third of businesses indicate the majority of their future suppliers will be located nationally.

EMPLOYEES AND STAFFING

Overall, the vast majority of the employee talent pool is located either in Bellevue or elsewhere in the Puget Sound.

While nearly one third of businesses anticipate an increase in the number of employees, the majority do not anticipate any changes over the next 12 months.

However, 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 61% of tourist-related businesses have difficulty retaining or finding talent.

BROADBAND INTERNET

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

Three quarters of businesses with broadband state that the service meets their current needs, yet only 58 percent feel their current level of service will meet their needs over the next few years.

ADDITIONAL TOPICS

Two-thirds of businesses are satisfied with the customer service received when dealing with their Bellevue Business Taxes.

Nearly all businesses state they would be likely to file their Bellevue business taxes electronically if it were available.

Nineteen percent (19%) of businesses have used an advisor in the past three years to help with small business development.

Only 17 percent of businesses offer an incentive to employees for alternative transportation and very few businesses that do not offer incentives are considering doing so.

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PROJECT OVERVIEW

BACKGROUND AND OBJECTIVES

The City of Bellevue conducted its first ever business survey to support its Business Retention Expansion Program, better understand the needs of local businesses and 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 first time the survey was conducted, careful consideration was taken in developing the questionnaire. 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 2015 business survey was 13 minutes by phone and 20 minutes on the web and 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 11,443 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. There were additional businesses that had an email address associated with the business, however these were examples of a single email address being associated with several business locations. These businesses received a separate email asking them to forward the survey link on to the specific locations.

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
- *Self-Reported Geographic Area*: SR 520/Bel-Red, Crossroads, Downtown, Eastgate, Factoria, Wilburton, Other
- *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 917 interviews were completed: 770 online and 147 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 3.1 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	26	221	247	27%	3,047	27%	8%	6.0%
Information Technology	26	58	84	9%	857	7%	10%	10.2%
Retail	47	80	127	14%	1,311	11%	10%	8.3%
Tourism	29	36	65	7%	689	6%	9%	11.6%
Other	19	375	394	43%	5,539	48%	7%	4.8%
Total	147	764	917	100%	11,443	100%	8%	3.1%

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KEY FINDINGS—OPERATING A BUSINESS IN BELLEVUE

BELLEVUE AS A PLACE TO OPERATE A BUSINESS

All Business

More than 7 out of 10 businesses feel that Bellevue is a “somewhat” or “significantly” better place to operate a business compared to other cities.

By Sector

Businesses in the Retail and Tourism sectors are twice as likely as other businesses to claim that Bellevue is worse than other cities and towns.

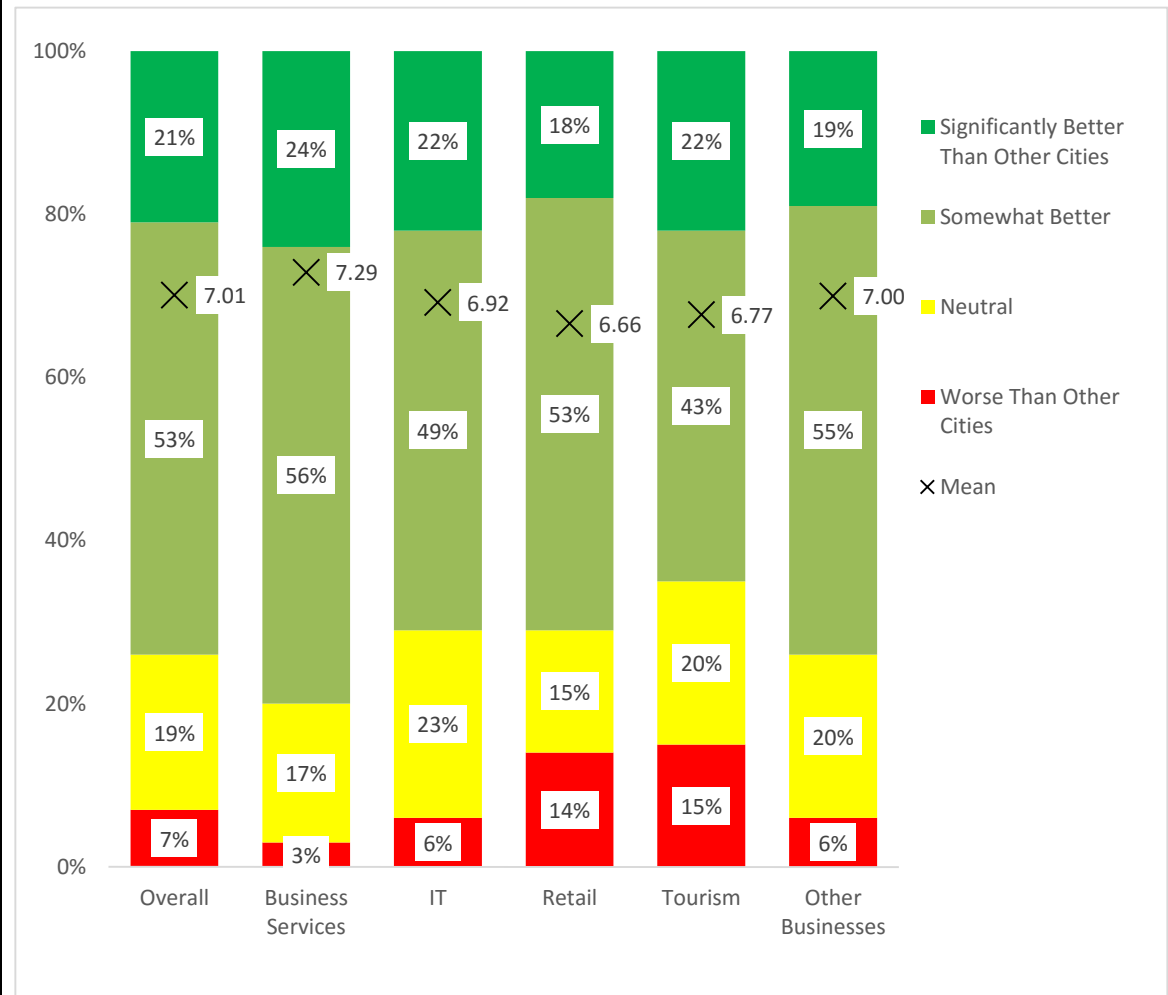
By Size

Ten percent (10%) of mid-sized businesses, those with 6 to 49 employees, state that Bellevue is worse than other cities as a place to operate a business. This is significantly greater than small businesses, those with 1 to 5 employees (5%).

By Age

Twelve percent (12%) of businesses who report opening during the 1980’s state that Bellevue is worse than other cities. This is significantly higher than businesses that have opened since then—five percent (5%) for businesses opened in the 1990’s and seven percent (7%) for businesses opened in the 2000’s and 2010 or later.

Figure 2: City of Bellevue as a Place to Operate a Business



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=917)

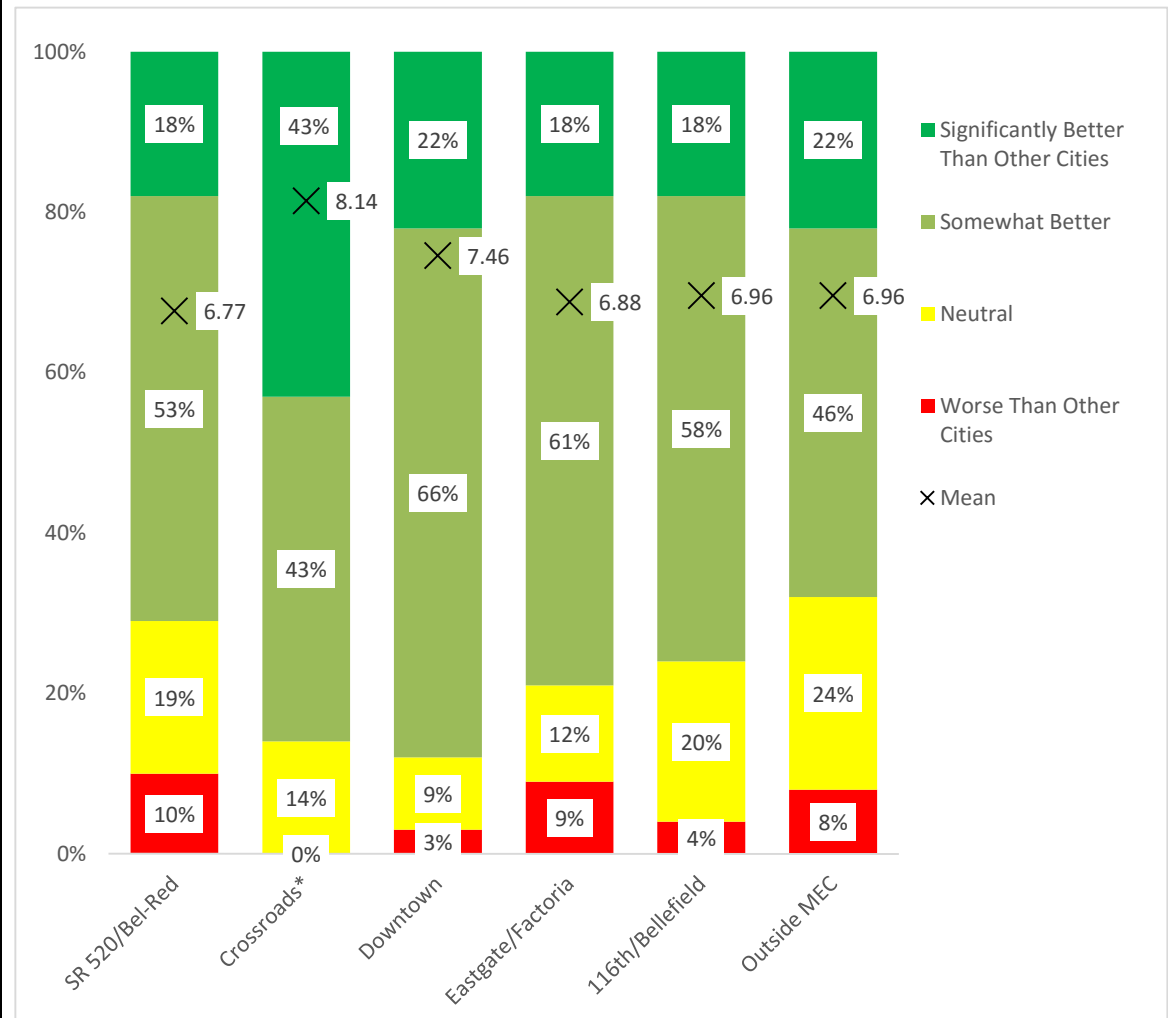
Mean is based on an 11 point scale from 0 to 10

By Location

When looked at by Major Employment Center, a geographic grouping of businesses provided by the City of Bellevue, businesses located in Crossroads and Downtown Bellevue provide significantly higher ratings than businesses located elsewhere.

It should be noted that only 14 responding businesses fall within the Crossroads Employment Center.

Figure 3: City of Bellevue as a Place to Operate a Business – By MEC



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. SR 520/Bel-Red (n=243); Crossroads (n=14); Downtown (n=166); Eastgate/Factoria (n=67); 116th/Bellefield (n=71); Outside MEC (n=356)

*Low base size

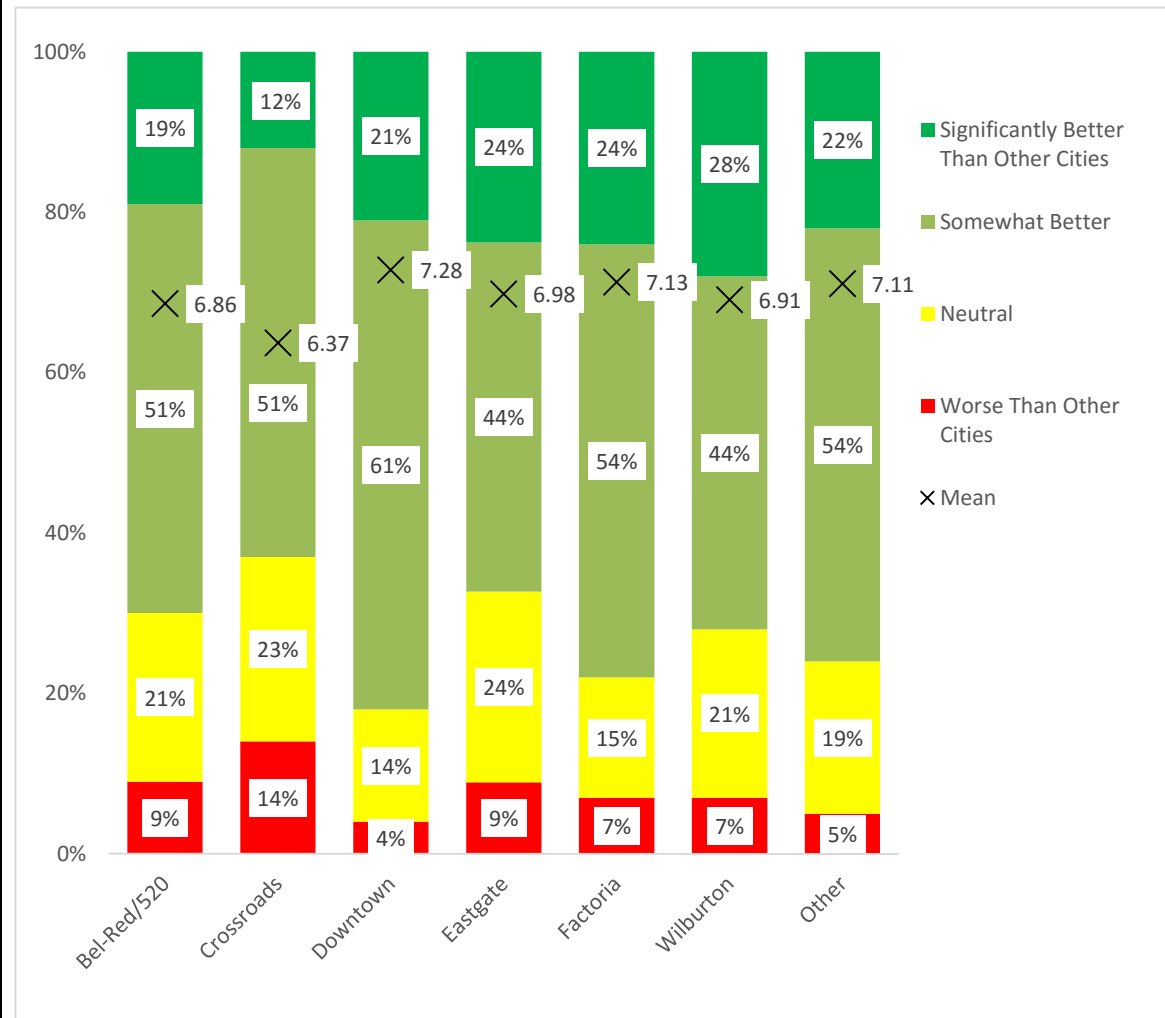
Mean is based on an 11 point scale from 0 to 10

Near the end of the survey, businesses were asked to indicate their geographic location as well. This was done to verify or cross-reference the MEC groupings performed by the city. Not all businesses self-reported that they belonged to the same MEC to which they were assigned (see Appendix II for details).

Businesses that self-report being downtown continue to provide the highest ratings.

The largest difference when comparing MEC grouping to self-reported grouping is the change in businesses located in Crossroads. While MEC-grouped businesses were significantly higher than most other areas, businesses who self-report being in Crossroads provide the lowest rating for Bellevue as a place to operate a business. Note that a much larger number of businesses self-report being located at Crossroads (80) as opposed to being assigned to the Crossroads Major Employment Center (14). This discrepancy results in several changes in the attitudes of Crossroads businesses depending on which geographic grouping is used. See Appendix II for additional details.

Figure 4: City of Bellevue as a Place to Operate a Business – By Self-Reported Geographic Area



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. SR 520/Bel-Red (n=237); Crossroads (n=80); Downtown (n=262); Eastgate (n=87); Factoria (n=94); Wilburton (n=44); Other (n=113)
 Mean is based on an 11 point scale from 0 to 10

QUALITY OF SERVICES PROVIDED TO BUSINESSES

All Businesses

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

By Sector

While the mean score for Retail businesses does not differ significantly from other sectors, Retail businesses are significantly more likely than Business Services and “Other” businesses to state that the quality of services does not meet expectations.

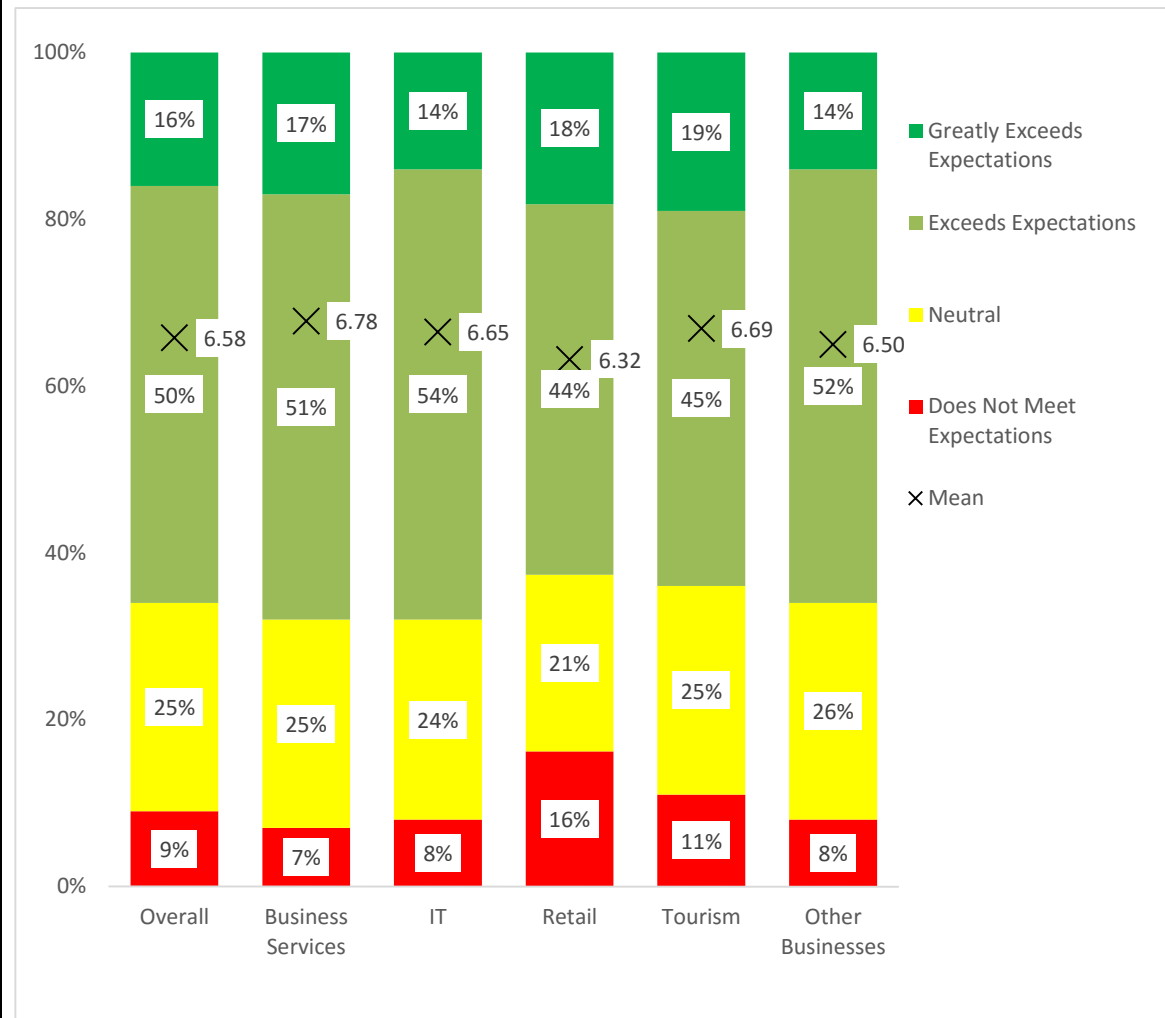
By Size

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

By Age

Businesses that opened during the 1980’s are also significantly more likely than those that opened before or after to state that the quality of services provided by the city does not meet expectations.

Figure 5: Quality of Services Provided to Businesses



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

Base: All respondents (n=917)

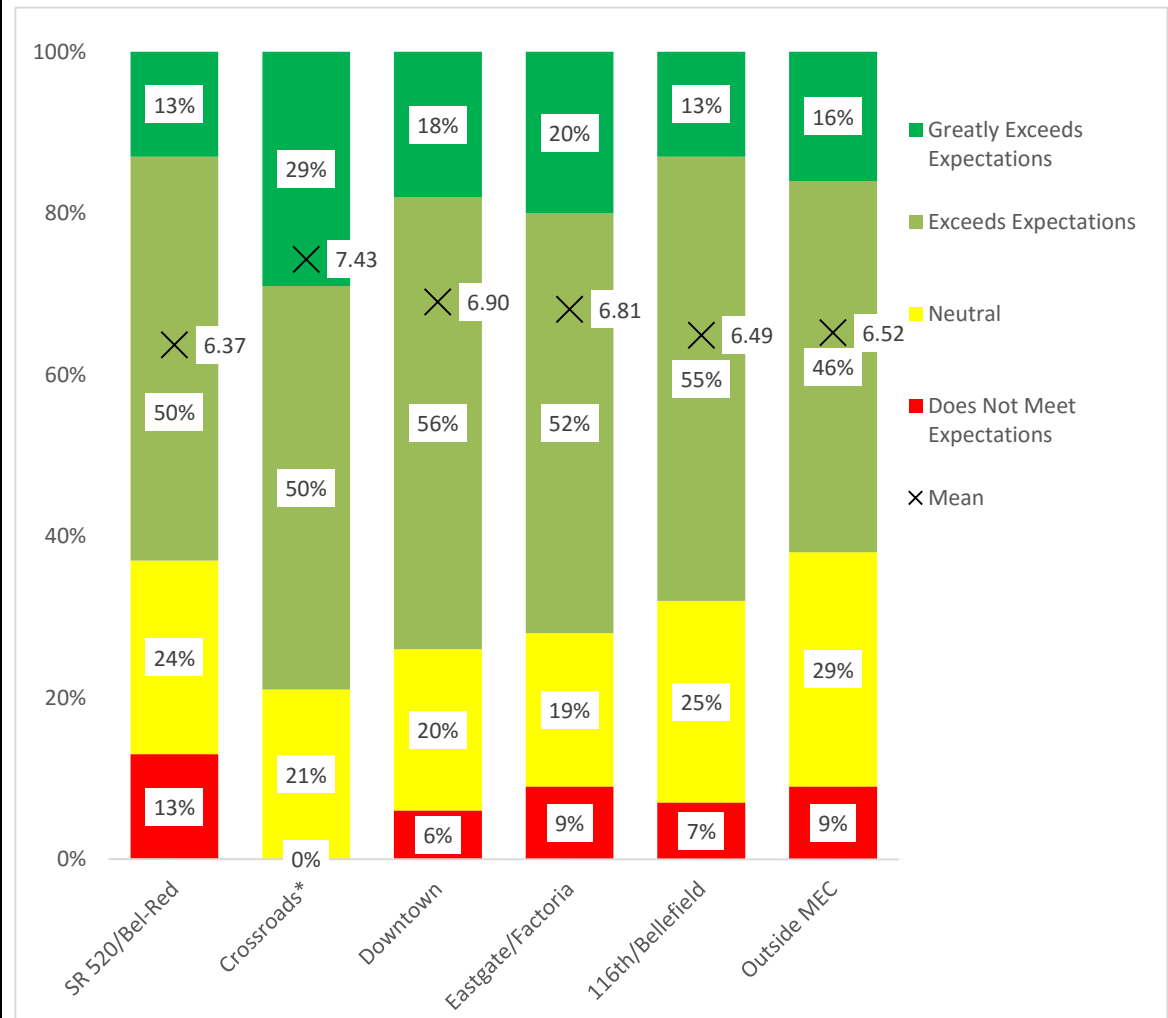
Mean is based on an 11 point scale from 0 to 10

By Location

Businesses located within the Crossroads and Downtown MEC's provide significantly higher ratings than other businesses for the quality of Services provided to businesses. These findings closely resemble the responses for Bellevue as a place to operate a business.

It should be noted that only 14 responding businesses fall within the Crossroads Economic Center.

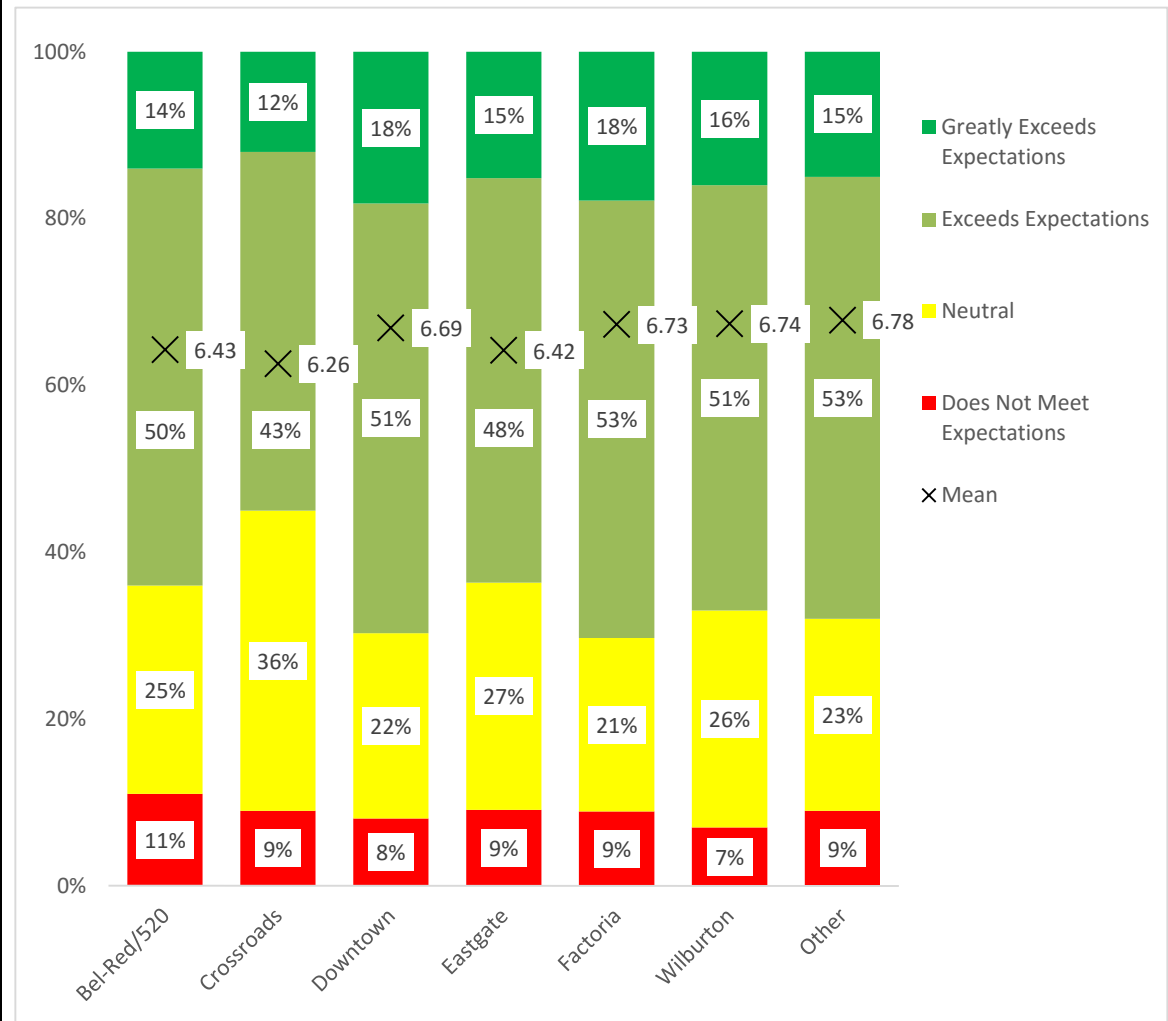
Figure 6: Quality of Services Provided to Businesses – By MEC from Sample



BNWRG3— How would you rate the overall quality of services provided to businesses by the City of Bellevue?
 Base: All respondents. SR 520/Bel-Red (n=243); Crossroads (n=14); Downtown (n=166); Eastgate/Factoria (n=67); 116th/Bellefield (n=71); Outside MEC (n=356)
 *Low base size
 Mean is based on an 11 point scale from 0 to 10

Quality of services when looked at by self-reported geography shows no significant differences between businesses.

Figure 7: Quality of Services Provided to Businesses – by Self-Reported Geographic Area



BNWRG3— How would you rate the overall quality of services provided to businesses by the City of Bellevue?
 Base: All respondents. SR 520/Bel-Red (n=237); Crossroads (n=80); Downtown (n=262); Eastgate (n=87); Factoria (n=94); Wilburton (n=44); Other (n=113)
 Mean is based on an 11 point scale from 0 to 10

BELLEVUE HEADED IN RIGHT VS. WRONG DIRECTION

All Businesses

Overall, the majority of businesses in Bellevue (69%) feel that the City is headed in the right direction.

By Sector

There is some variance based on business sector with Information Technology businesses providing the highest ratings and Retail businesses providing the lowest ratings. The difference between these two sectors is statistically significant.

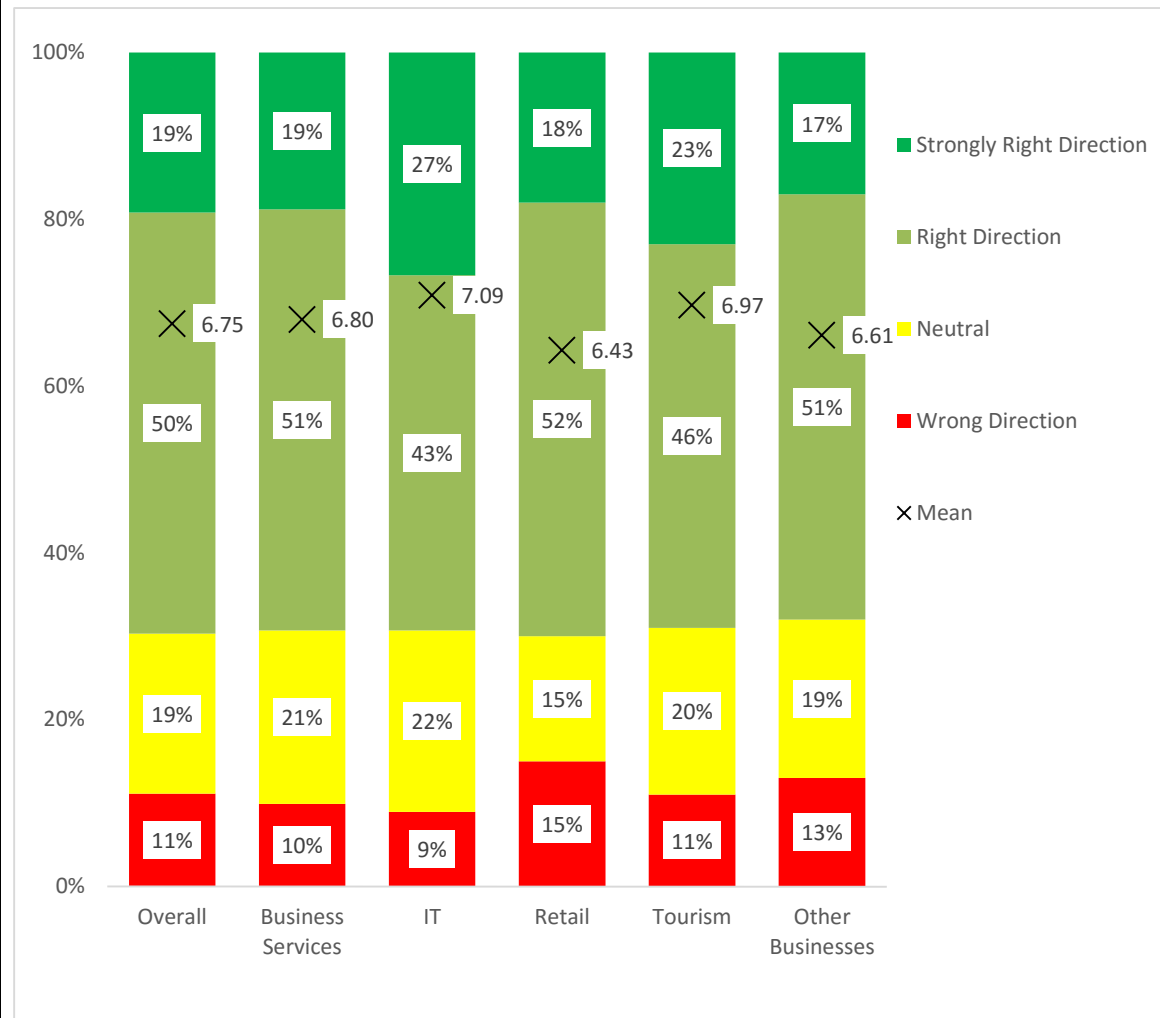
By Size

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

By Age

There is a general trend based on age of business with newer businesses being more likely than older businesses to feel that that Bellevue is headed in the right direction. This difference is significant when comparing businesses opened in 2010 or later to businesses opened in the 1980s and prior.

Figure 8: Direction City is Headed



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

Base: All respondents (n=917)

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

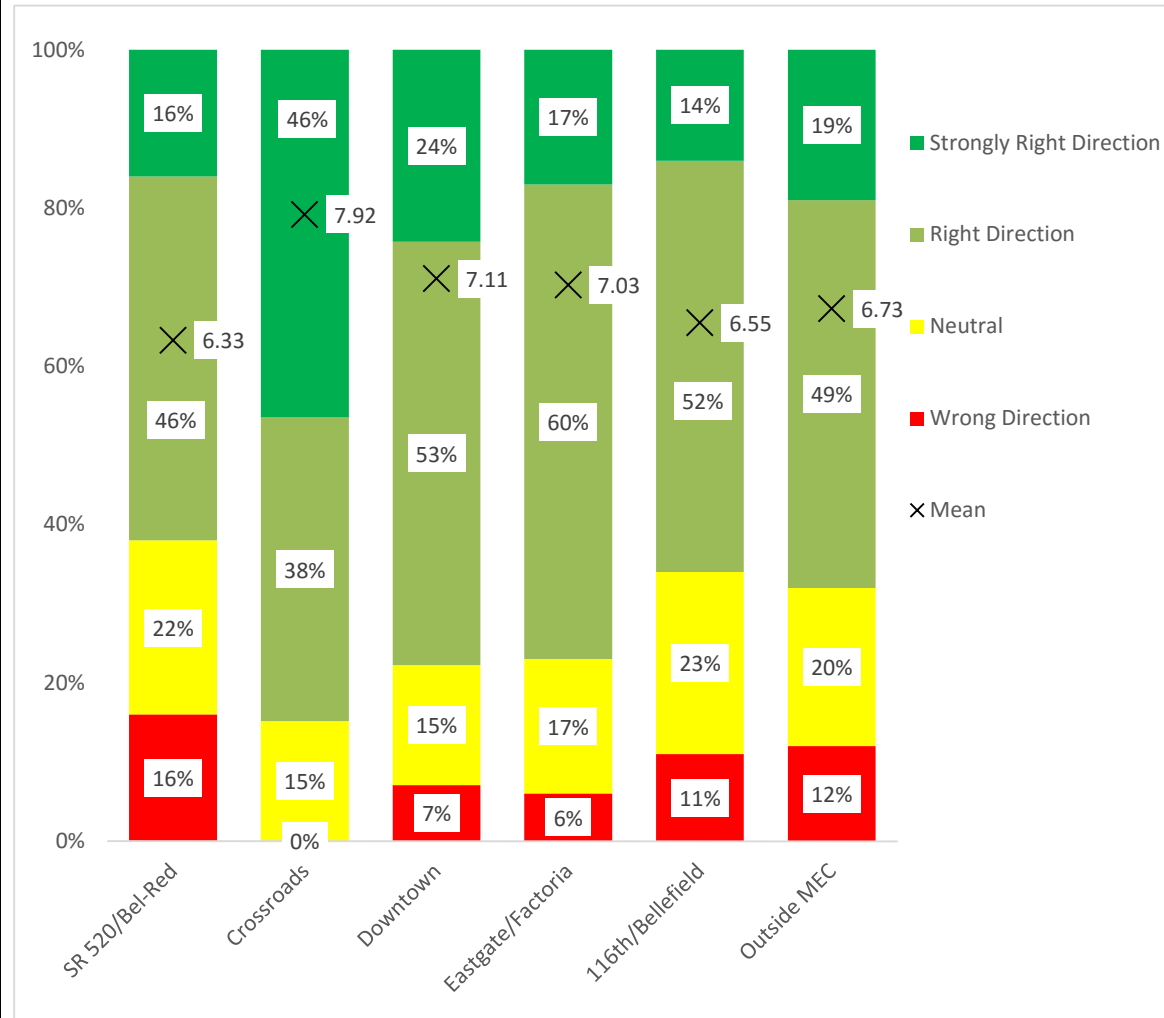
By Location

Similar to other findings by Major Employment Center, businesses located in Crossroads and Downtown provide higher responses than businesses located elsewhere.

Businesses located within the State Route 520 / Bel-Red MEC give significantly lower ratings than all other businesses regarding the direction the City is headed.

It should be noted that only 14 responding businesses fall within the Crossroads Economic Center.

Figure 9: Direction City is Headed – by MEC from Sample



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

Base: All respondents. SR 520/Bel-Red (n=243); Crossroads (n=14); Downtown (n=166); Eastgate/Factoria (n=67); 116th/Bellefield (n=71); Outside MEC (n=356)

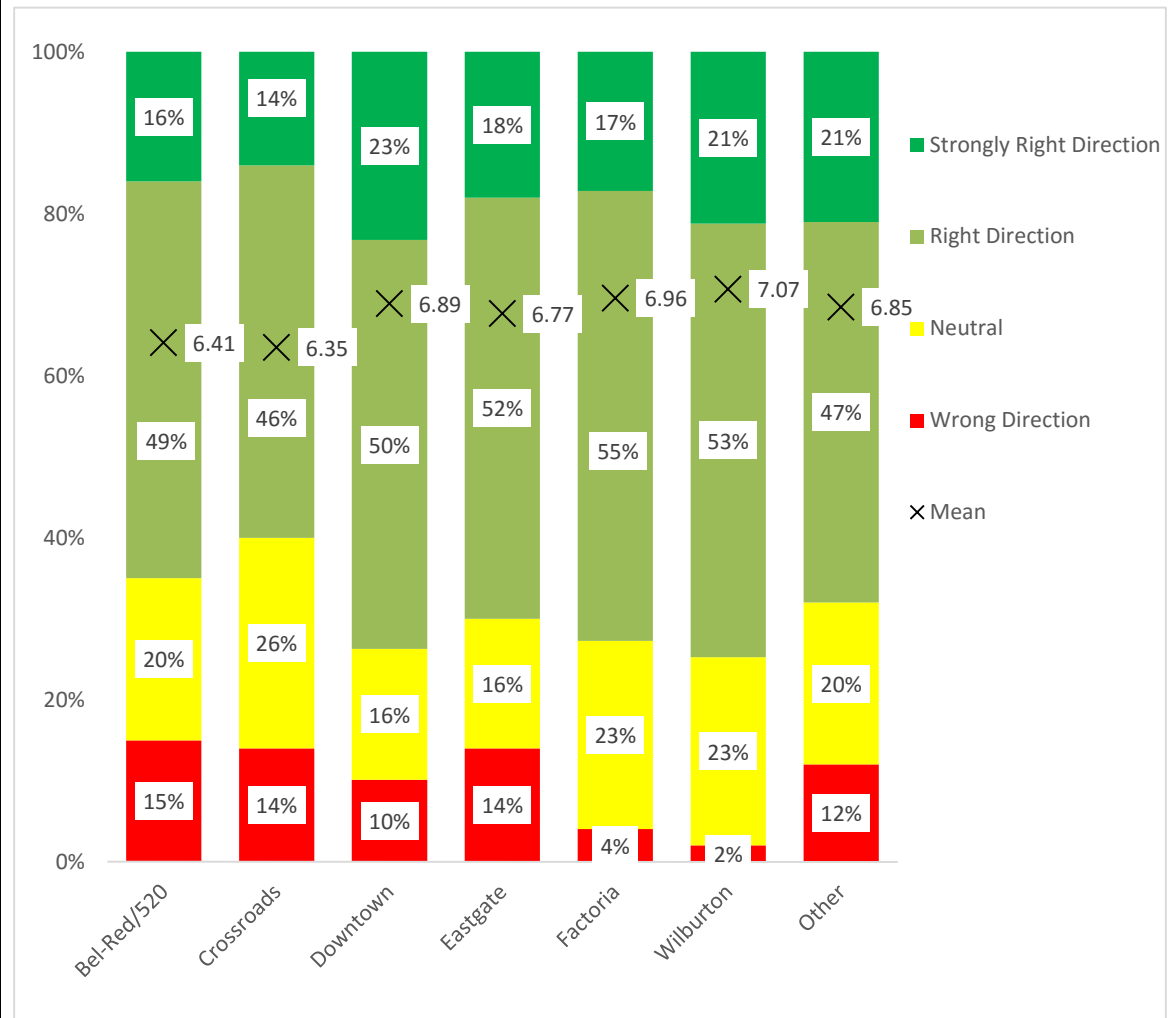
*Low base size

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

Results regarding the direction the City is headed vary when looked at by self-reported geography as opposed to MEC assignments.

While businesses located along State Route 520 / Bel-Red continue to report significantly lower scores regarding the direction the City is headed, businesses self-reporting in Crossroads and Eastgate also provide low ratings for this question.

Figure 10: Direction City is Headed – by Self-Reported Geographic Area



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

Base: All respondents. SR 520/Bel-Red (n=237); Crossroads (n=80); Downtown (n=262); Eastgate (n=87); Factoria (n=94); Wilburton (n=44); Other (n=113)

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

REASONS FOR MOVING IN THE RIGHT DIRECTION

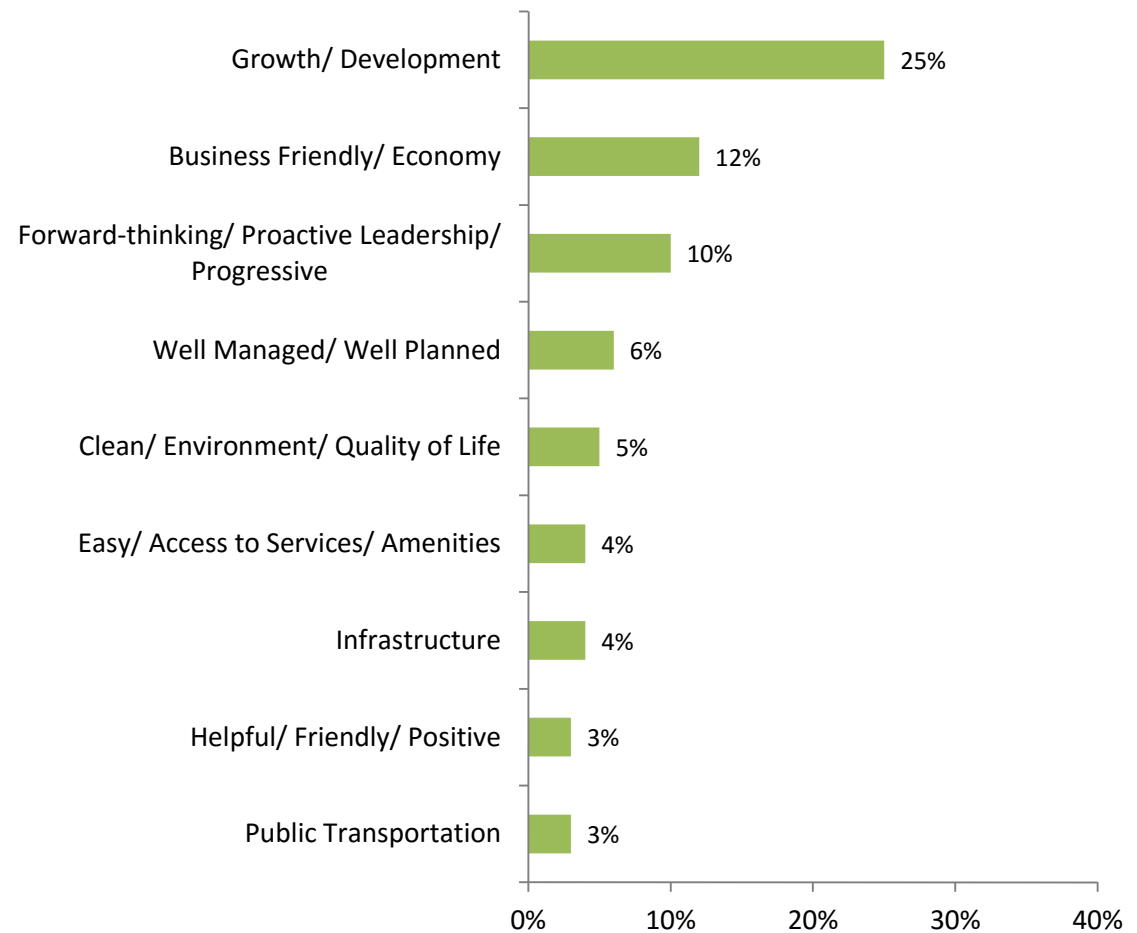
Respondents were asked, via an open-ended question, to indicate why they thought that Bellevue was moving in the right or wrong direction. The open-end questions were post coded and summarized. The full text is located in Appendix III.

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.

Businesses in the Tourism sector as well as businesses located in the Eastgate / Factoria area were significantly more likely to mention leadership as a reason that Bellevue is headed in the right direction.

Figure 11: Reasons Bellevue is Moving in the Right Direction



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=626).

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

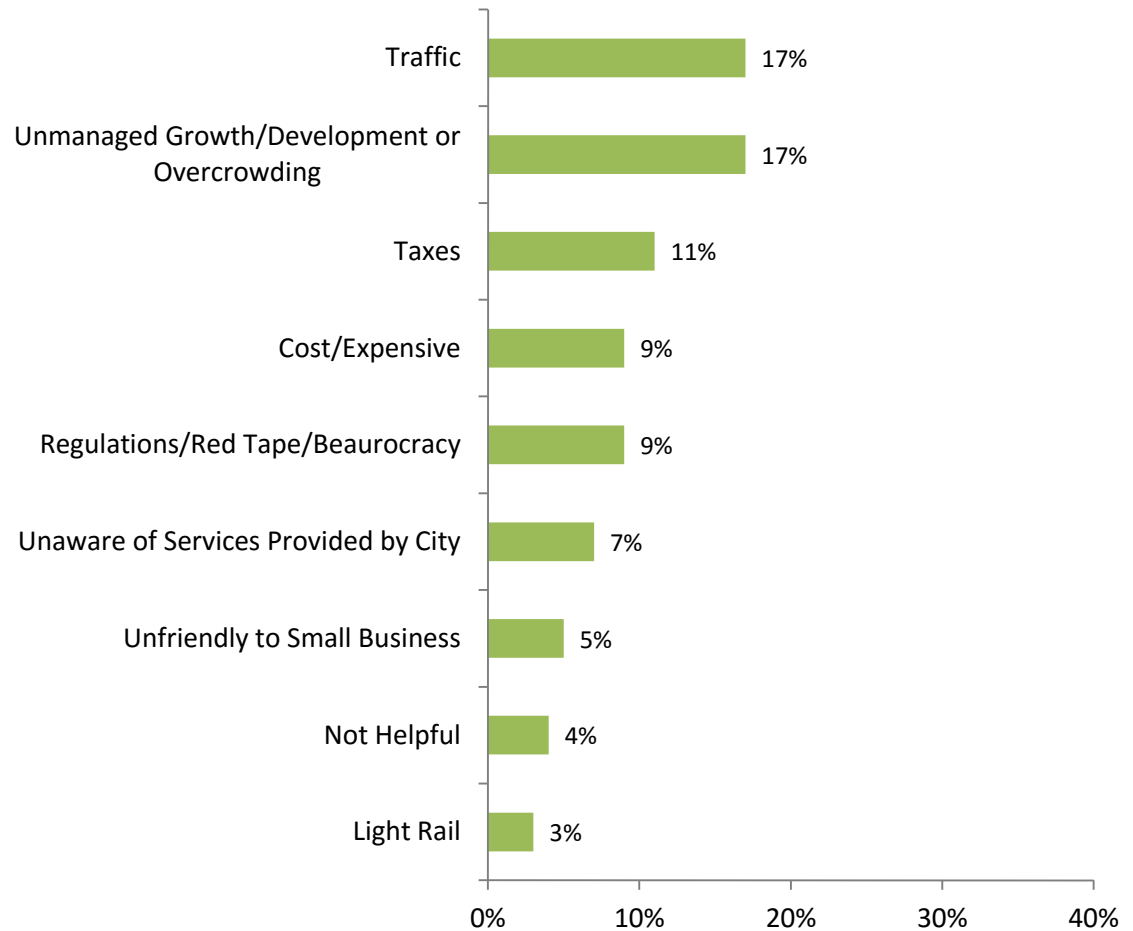
REASONS FOR NOT MOVING IN THE RIGHT DIRECTION

Only 30 percent of businesses did not feel that Bellevue was moving in the right direction (answer of 5 or less on a scale from 0 to 10).

Traffic and too much growth are the top mentioned reasons businesses feel that Bellevue is not moving in the right direction. Followed by issues related to taxes, the costs associated with being located in Bellevue.

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 located in Appendix III.

Figure 12: Reasons Bellevue is Not Moving in the Right Direction



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

Base: Respondents who answered NWRG4 with 5 or less (n=280).

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

VALUE FOR TAX DOLLAR

All Businesses

Overall, 60 percent of businesses feel that they are getting their money's worth for the tax dollar paid.

By Sector

Retail businesses are the least likely to feel this way—with 26 percent indicating they are not getting their money's worth. This is significant when compared to Business Services and Tourism businesses.

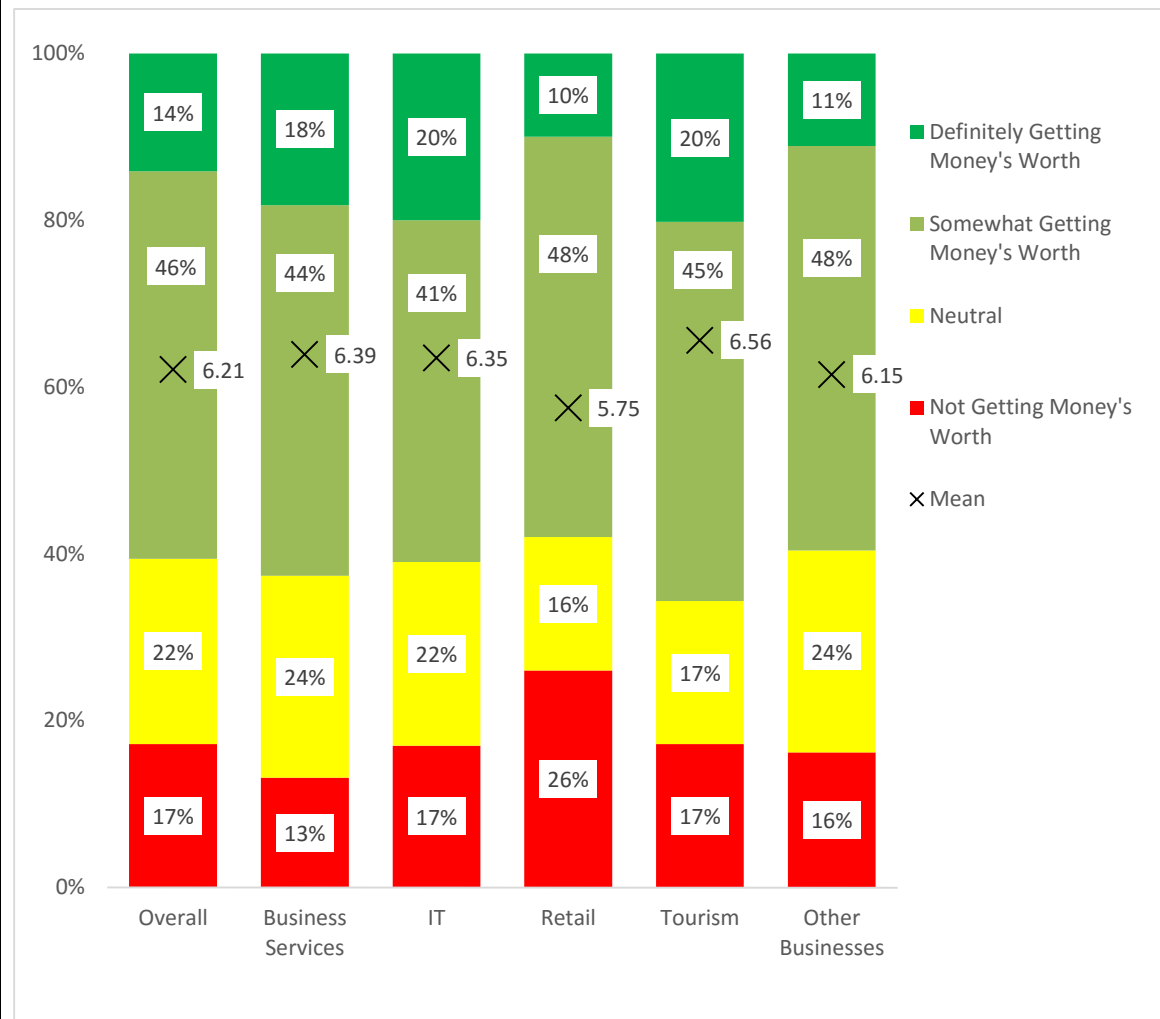
By Size

Small businesses—those with one to five employees—are the most likely to feel they are getting their money's worth. This difference is significant when compared to mid-sized businesses (6 to 49 employees).

By Age

There are no differences based upon age of the business.

Figure 13: Money's Worth for Tax Dollar



BNWRG5— 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 (n=917)

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

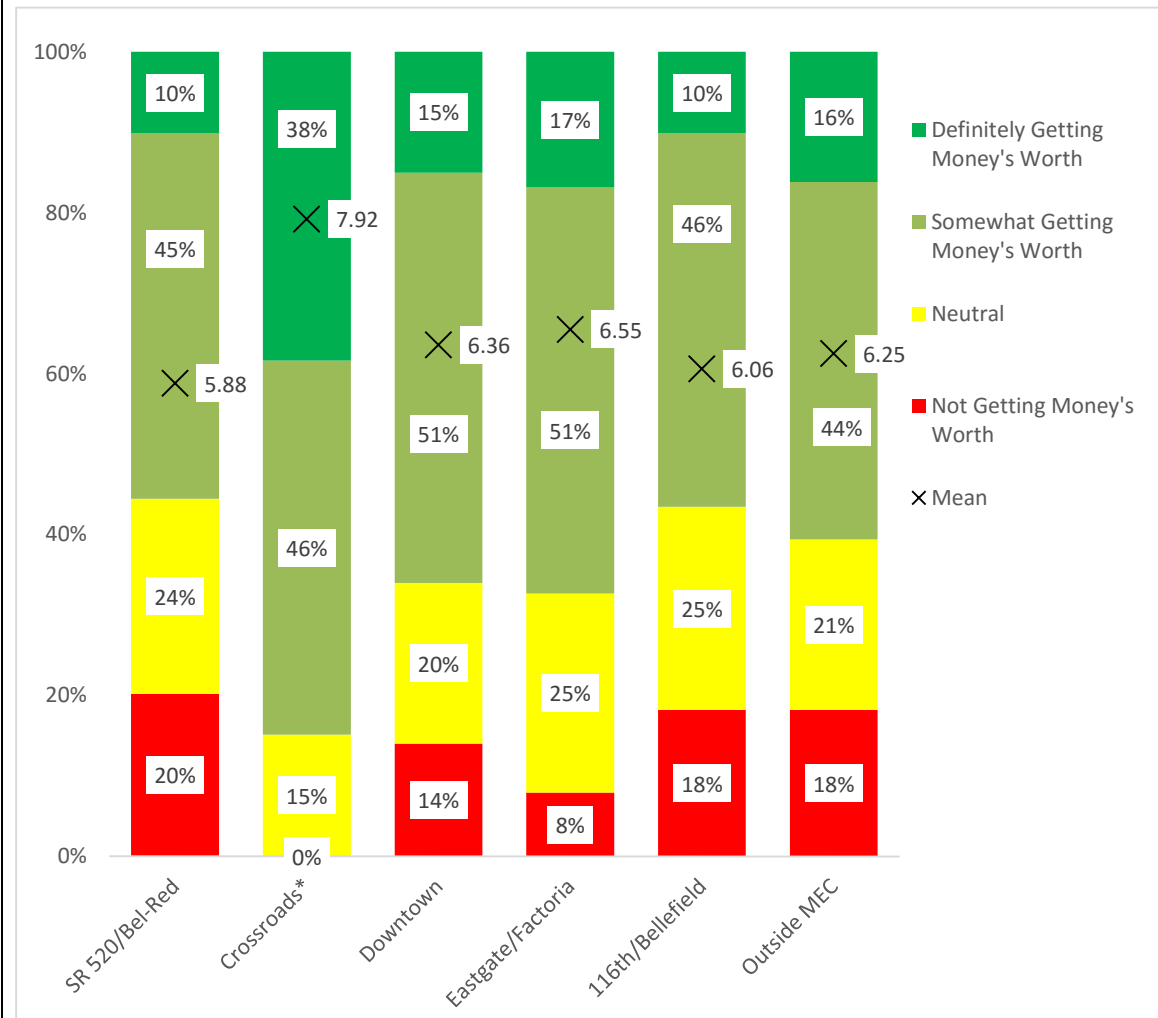
By Location

Businesses located in the Crossroads MEC provide higher ratings than businesses located elsewhere.

Businesses located within the State Route 520 / Bel-Red MEC give significantly lower ratings than all other businesses regarding the value of the tax dollar paid.

It should be noted that only 14 responding businesses fall within the Crossroads Economic Center.

Figure 14: Money's Worth for Tax Dollar – by MEC from Sample



BNWRG5— Thinking about services and facilities in Bellevue, do you feel you are getting your money's worth for your tax dollar or not?

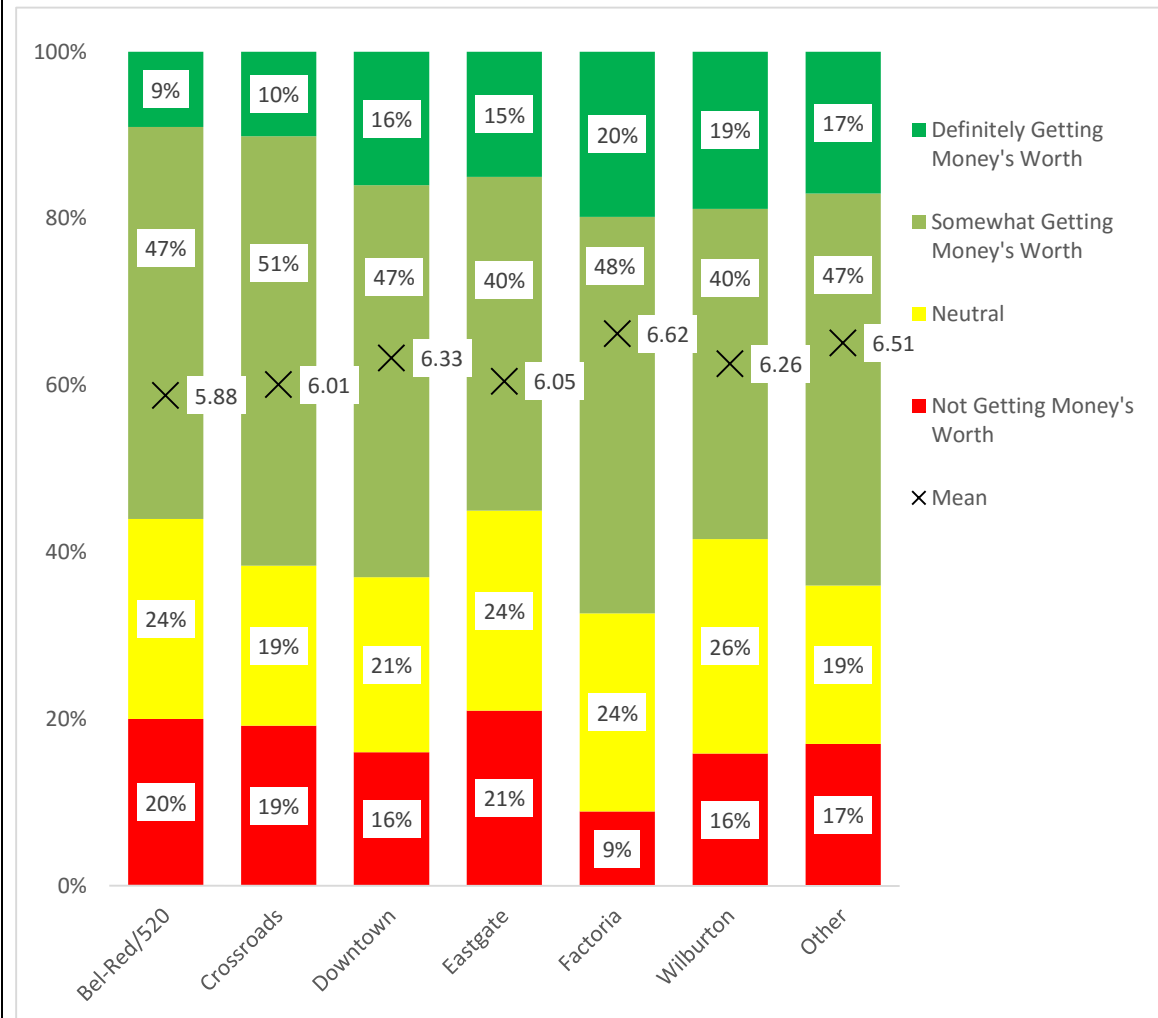
Base: All respondents. SR 520/Bel-Red (n=243); Crossroads (n=14); Downtown (n=166); Eastgate/Factoria (n=67); 116th/Bellefield (n=71); Outside MEC (n=356)

*Low base size

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

When looking at self-reported geography, businesses located along State Route 520 / Bel-Red continue to report significantly lower scores regarding value for tax dollars.

Figure 15: Money's Worth for Tax Dollar – by Self-Reported Geographic Area



BNWRG5— 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. SR 520/Bel-Red (n=237); Crossroads (n=80); Downtown (n=262); Eastgate (n=87); Factoria (n=94); Wilburton (n=44); Other (n=113)

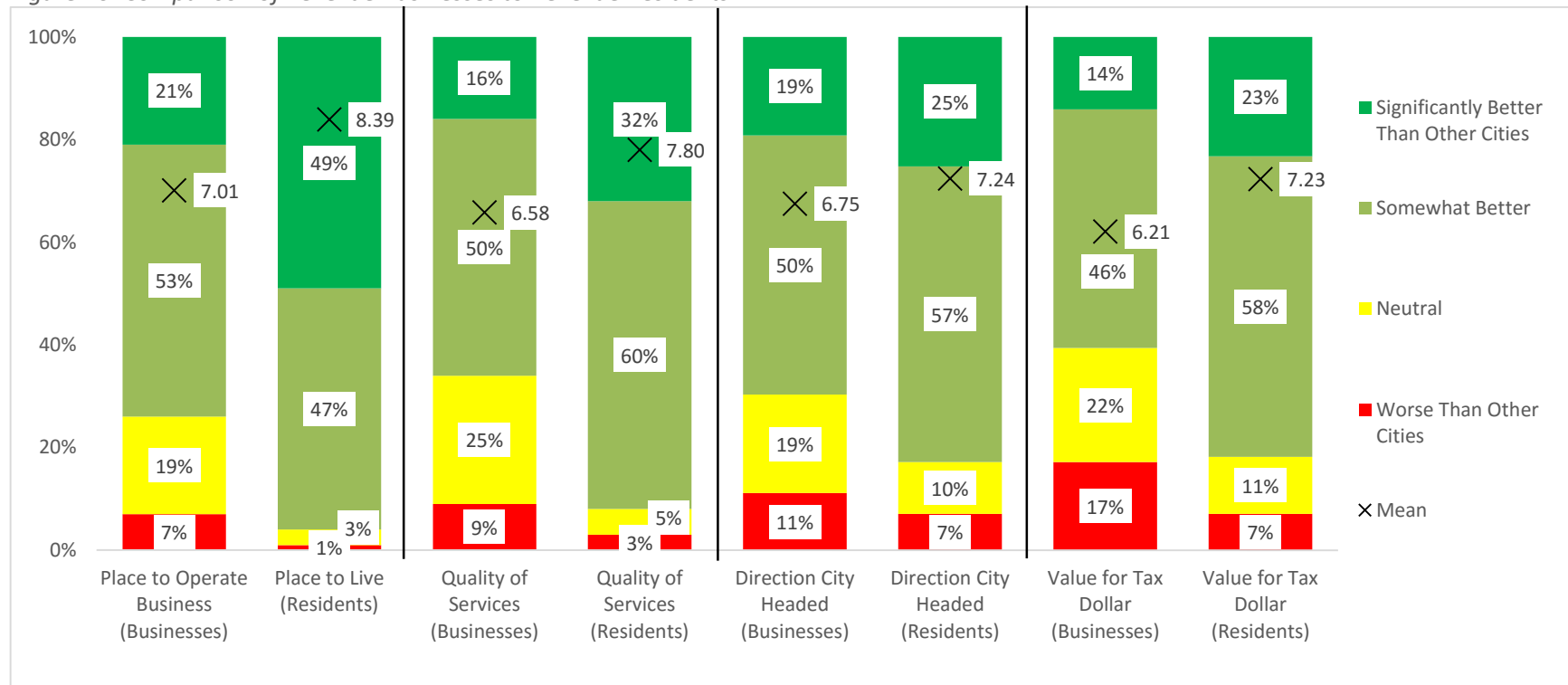
Mean is based on an 11 point scale from 0 to 10

COMPARISON TO RESIDENTIAL SURVEY

Four of the questions in the 2015 Bellevue Business survey are very 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=917) Base Residents: All respondents (n=917)

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

MOST IMPORTANT BUSINESS RELATED ISSUE FACING BELLEVUE

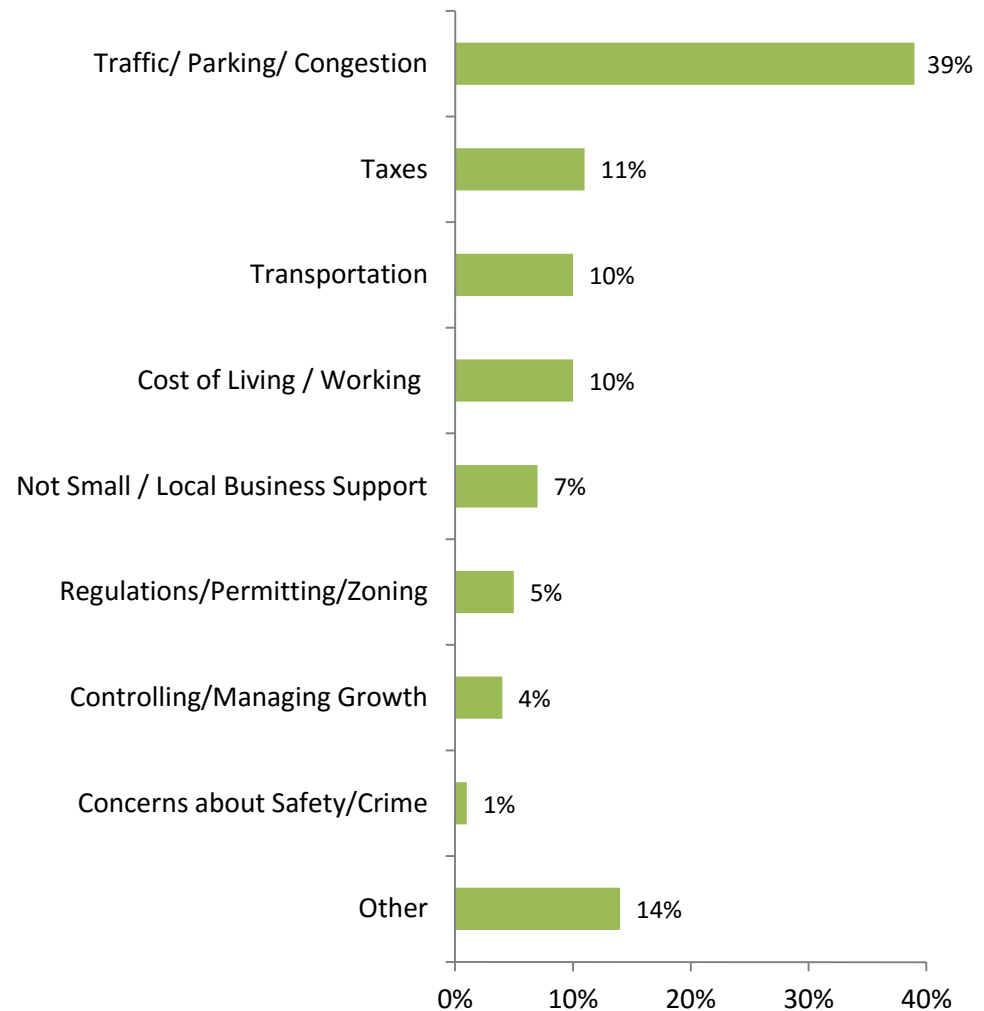
Businesses were asked to indicate what they believed is the biggest problem facing Bellevue in the next two years.

Traffic was 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 Bel-Red/SR-520 and Downtown mention traffic most often.

Taxes was the second most mentioned response overall. Mentions of taxes varied significantly by business sector with Information Technology and Retail businesses being significantly more likely than other businesses to feel that taxes are the biggest problem facing Bellevue.

Figure 17: Biggest Problems Facing Bellevue



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 (n=917).

LIKELIHOOD TO RECOMMEND STARTING A BUSINESS IN BELLEVUE

All Businesses

Overall, businesses are likely to recommend starting a business in Bellevue. However, responses vary by business sector.

By Sector

Retail and “Other” businesses are least likely to recommend opening a business in Bellevue. The difference is significant when compared to Business Services or Information Technology.

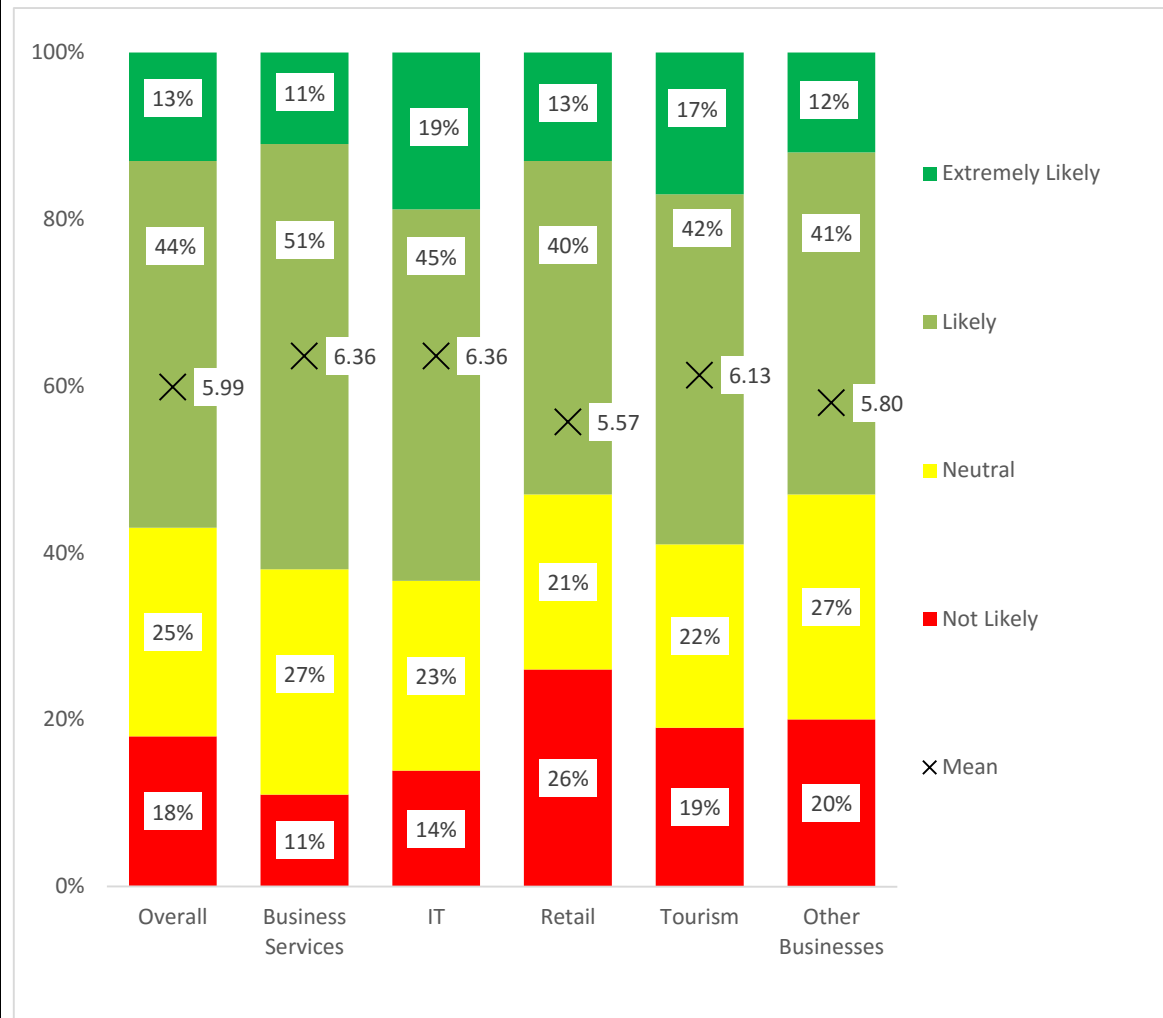
By Size

Small businesses are significantly more likely than mid-sized businesses to recommend starting a business in Bellevue.

By Age

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

Figure 18: Likelihood of Recommending Starting a Business in Bellevue



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

Base: All respondents (n=917)

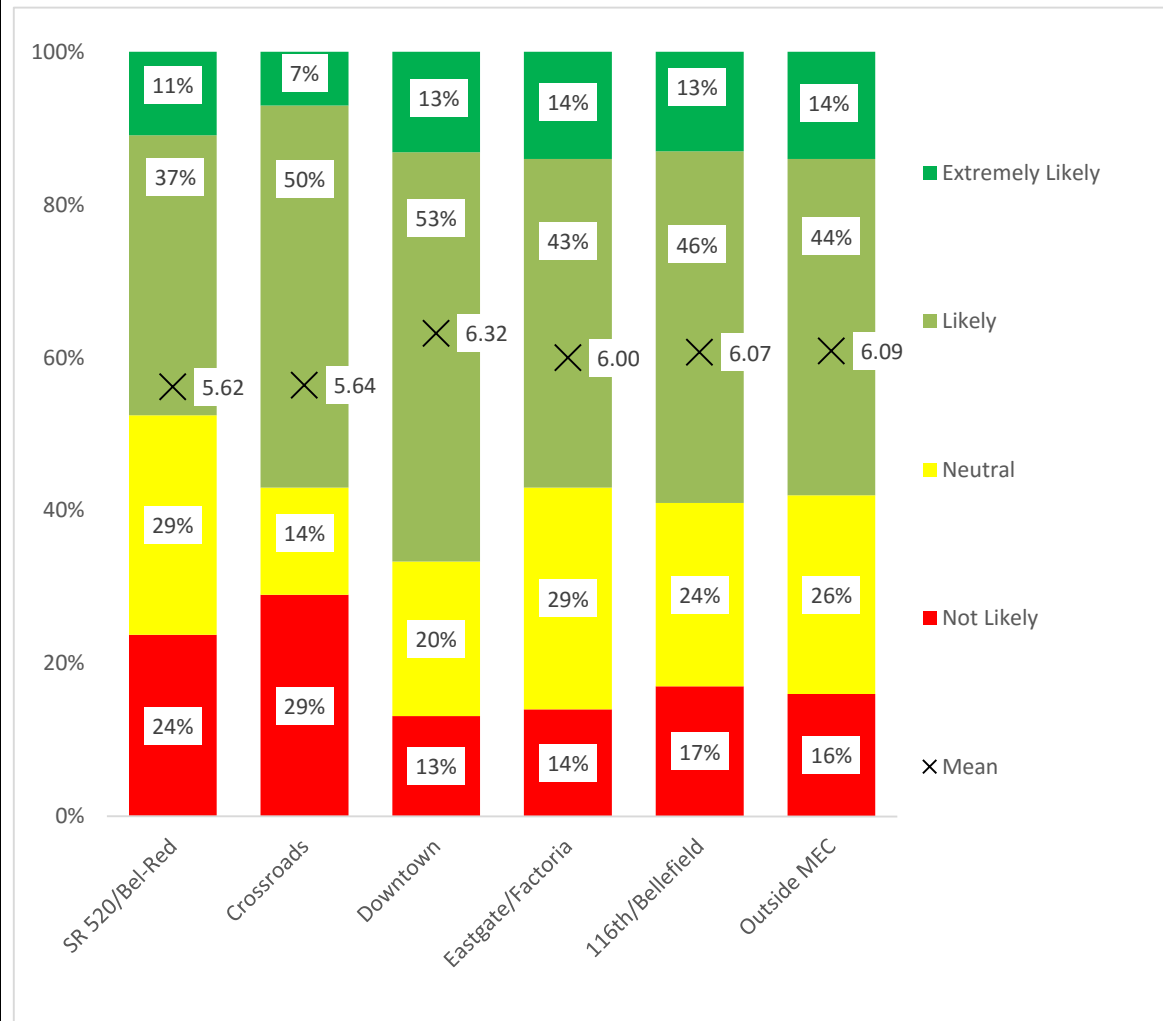
Mean is based on an 11 point scale from 0 to 10

By Location

Nearly one-quarter (24%) of businesses grouped within the State Route 520 / Bel-Red MEC are “not likely” to recommend starting a business in Bellevue. This is significantly higher than businesses located Downtown and outside the MEC areas.

While 29 percent of businesses assigned to the Crossroads MEC are “not likely” to recommend starting a business in Bellevue, this is not statistically significant when compared to other areas due to smaller sample sizes.

Figure 19: Likelihood of Recommending Starting a Business in Bellevue – by MEC from Sample



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

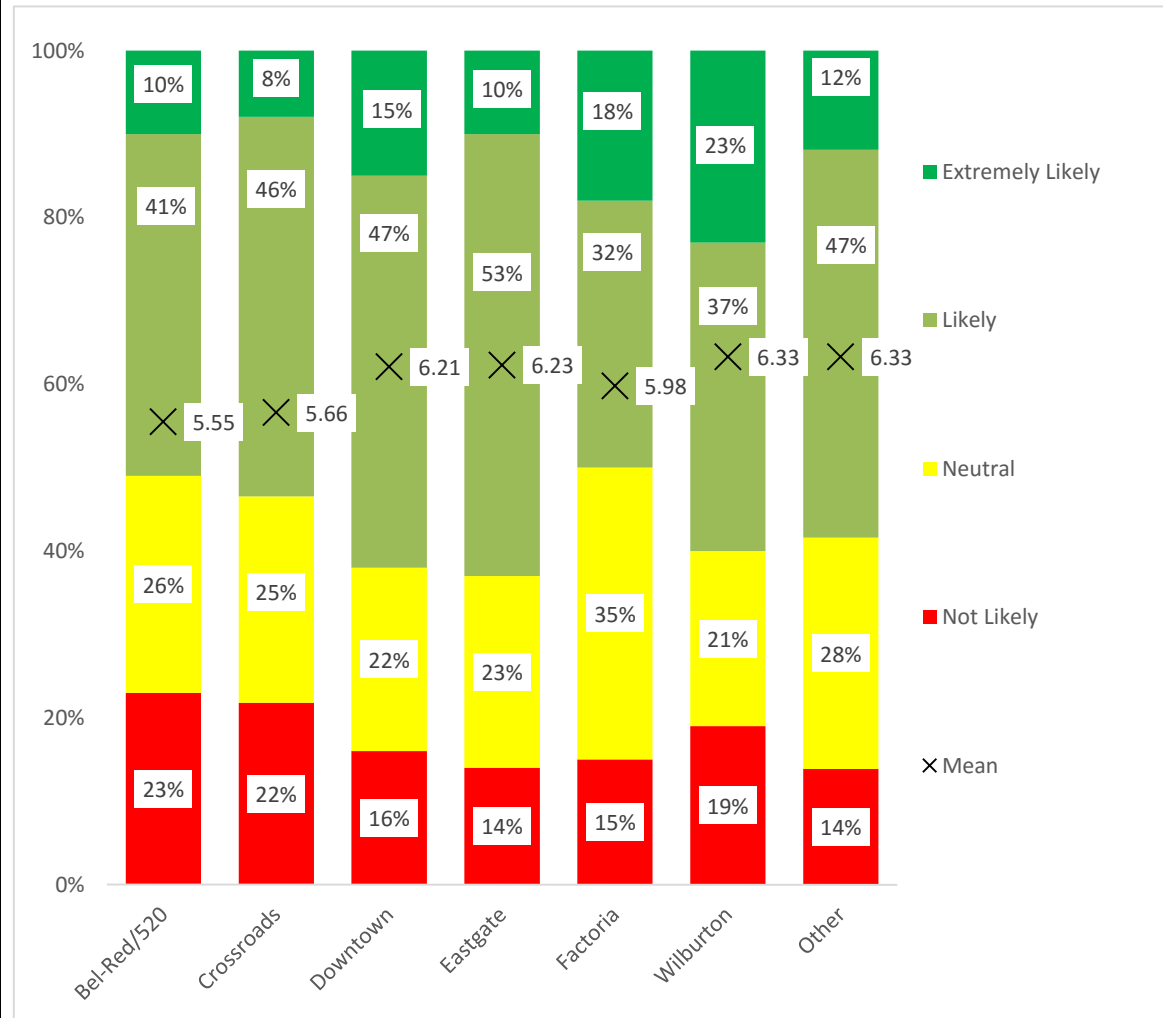
Base: All respondents (n=917)

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

Similar to the findings by MEC, 23 percent of businesses who self-report their location as State Route 520 / Bel-Red are “not likely” to recommend starting a business in Bellevue. This is significantly higher than businesses located elsewhere.

While 22 percent of businesses who self-report being in Crossroads say they are “not likely” to recommend starting a business in Bellevue, this is not statistically significant when compared other areas due to smaller sample sizes.

Figure 20: Likelihood of Recommending Starting a Business in Bellevue – By self-reported Geographic Area



ADV1 - How likely are you to recommend starting a business in Bellevue?
 Base: All respondents (n=917)
 Mean is based on an 11 point scale from 0 to 10

BELLEVUE'S ECONOMY COMPARED TO REST OF PUGET SOUND

All Businesses

Overall, ninety-two percent of businesses feel the Bellevue's economy is better than other Puget Sound cities and towns. Businesses across all sectors are in relative agreement with this issue.

By Sector

There are no differences based upon sector.

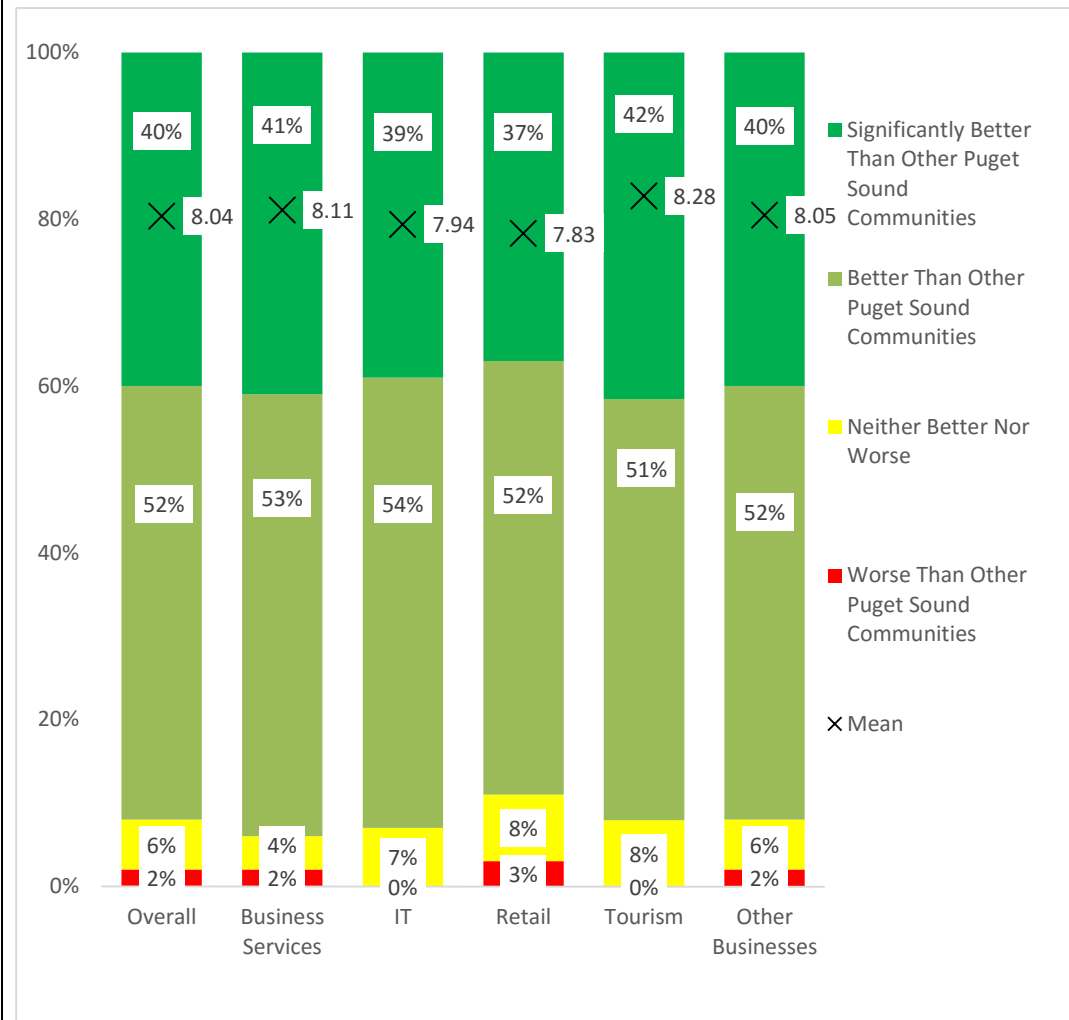
By Size

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 21: Current Bellevue Economy Compared to Rest of Puget Sound Communities



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=917)

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

FACTORS WITH THE BIGGEST IMPACT ON BUSINESSES

OVERALL IMPACT FACTORS

All Businesses

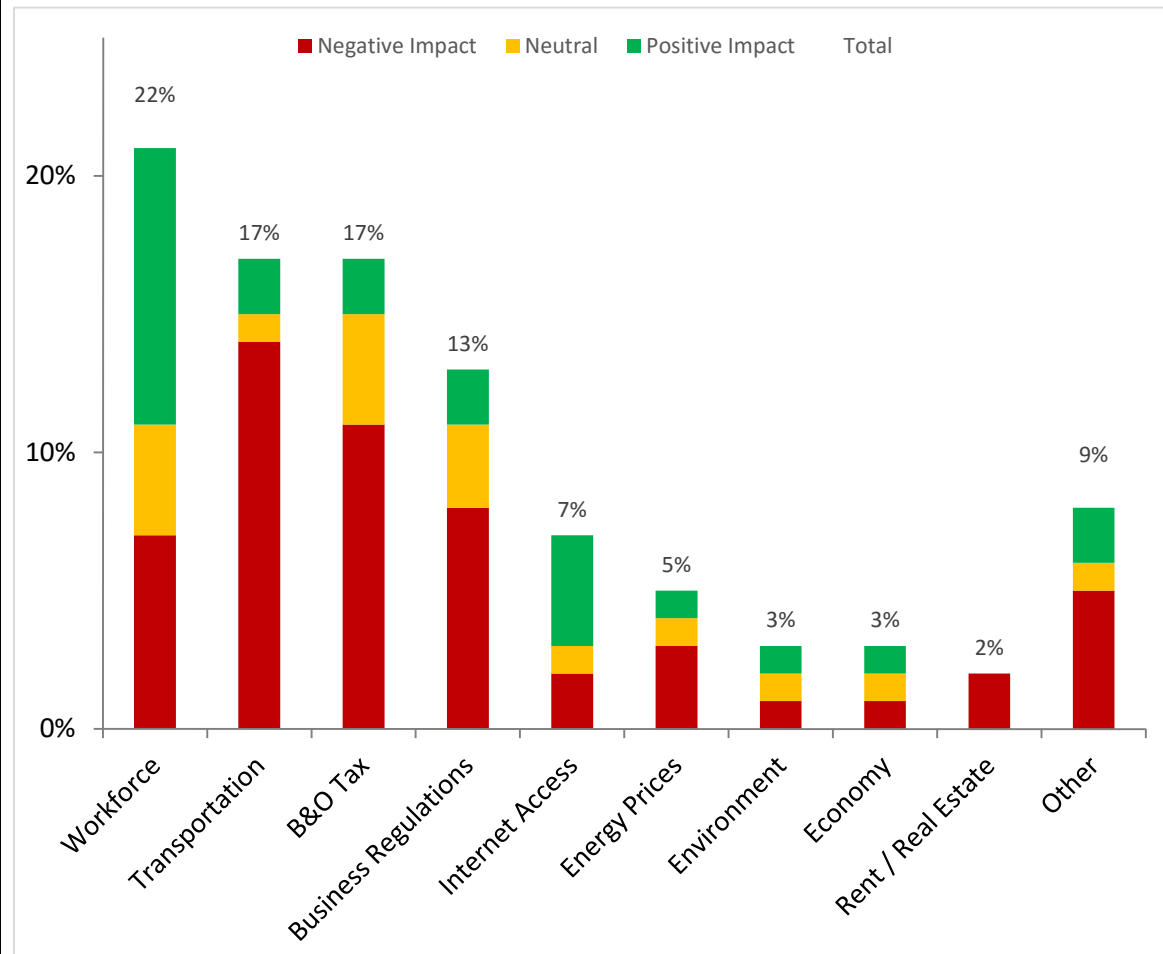
Businesses were provided a list of factors that could affect their business and asked to indicate which one would have the largest impact on their business over the next three to five years. This question was followed by one asking businesses if that factor would have a positive or negative impact on their business.

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 nearly 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



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=917)

By Sector

Business Services

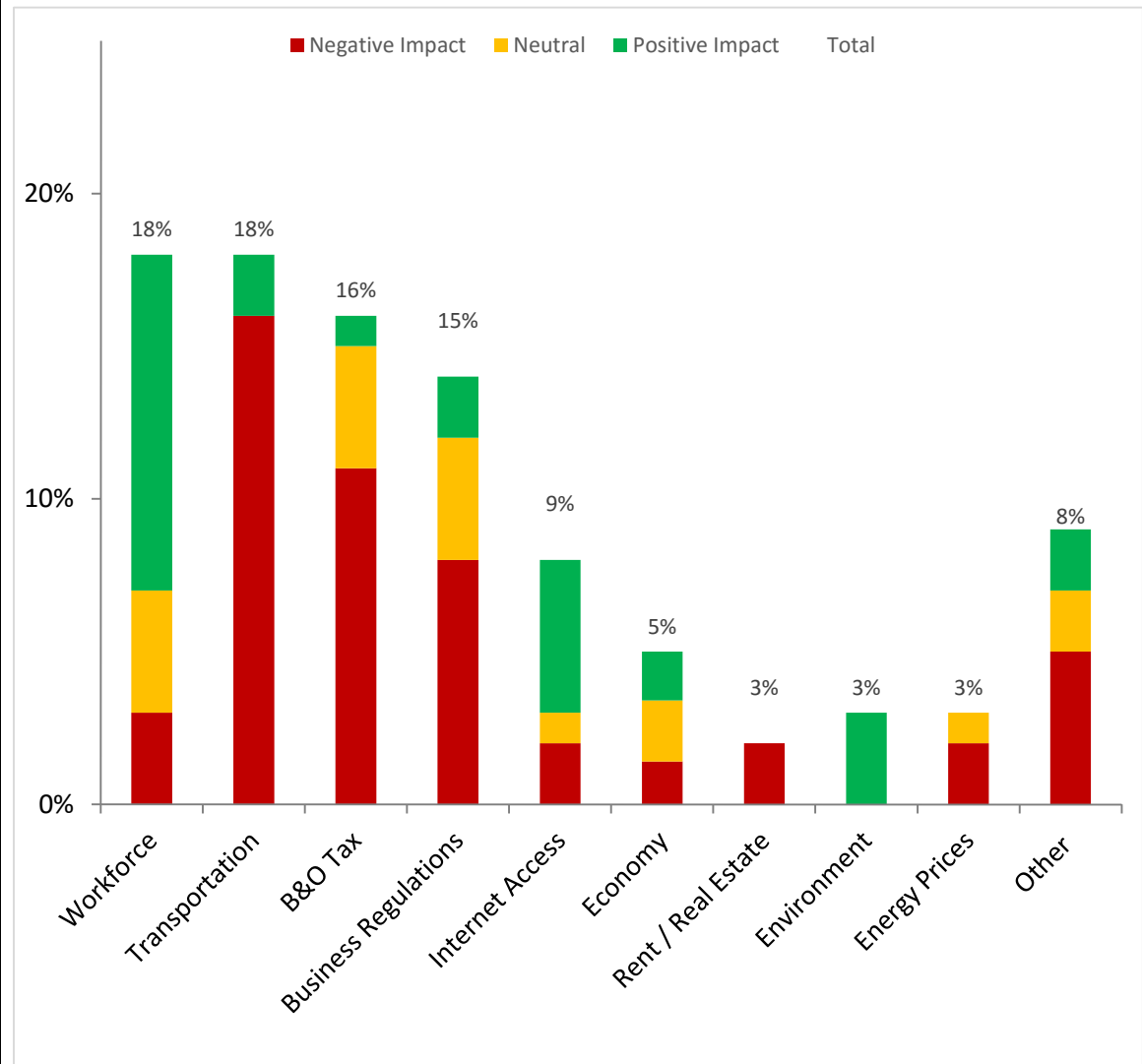
Workforce and Transportation are the top two factors mentioned among businesses in the Business Services sector; each receiving eighteen percent of mentions.

Business Services are optimistic regarding the future of the workforce.

Conversely, nearly all Business Services feel that Transportation will have a negative impact.

Business Services also have views that are more negative regarding Business and Occupation Taxes and Business Regulations than businesses as a whole.

Figure 23: Factors With the Biggest Impact – Business Services



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=247)

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).

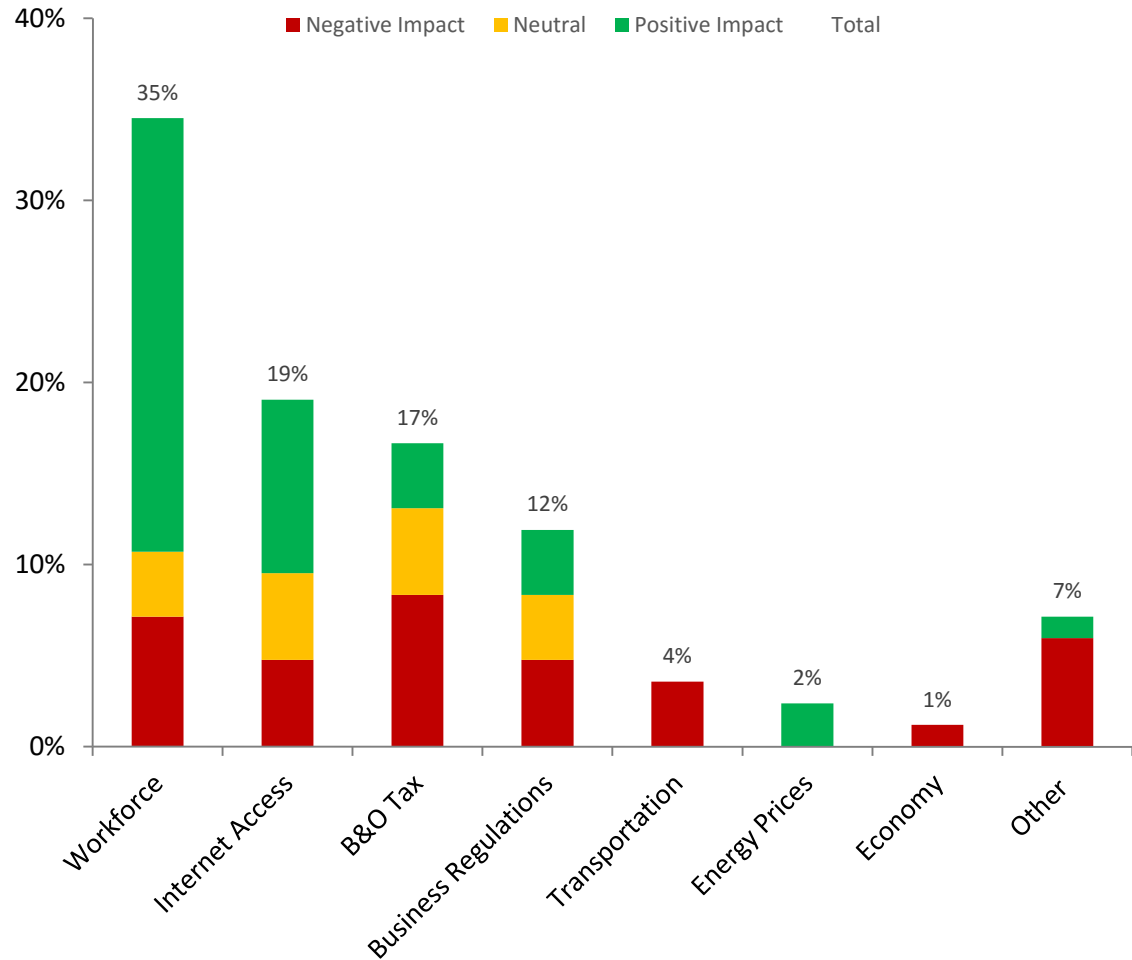
The majority of Information Technology businesses feel that the workforce will positively affect their business.

Internet access is the second 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 24: Factors With the Biggest Impact – Information Technology



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=84)

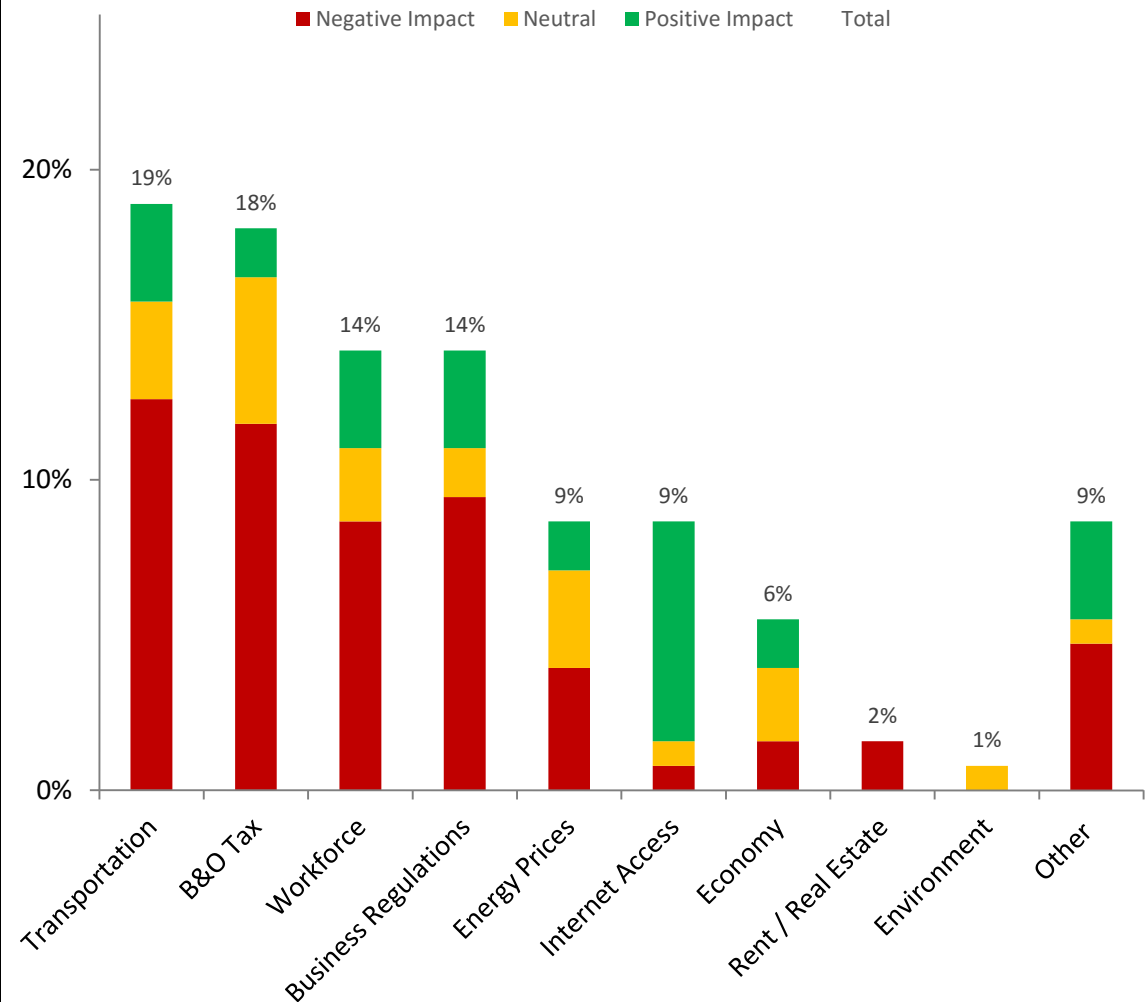
Retail

Transportation and B&O Taxes 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.

Workforce and Business Regulations both receive fourteen percent of mentions, and the majority of Retail businesses believe that both of these will have a negative impact on their business in the coming years.

Figure 25: Factors With the Biggest Impact – Retail



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=127)

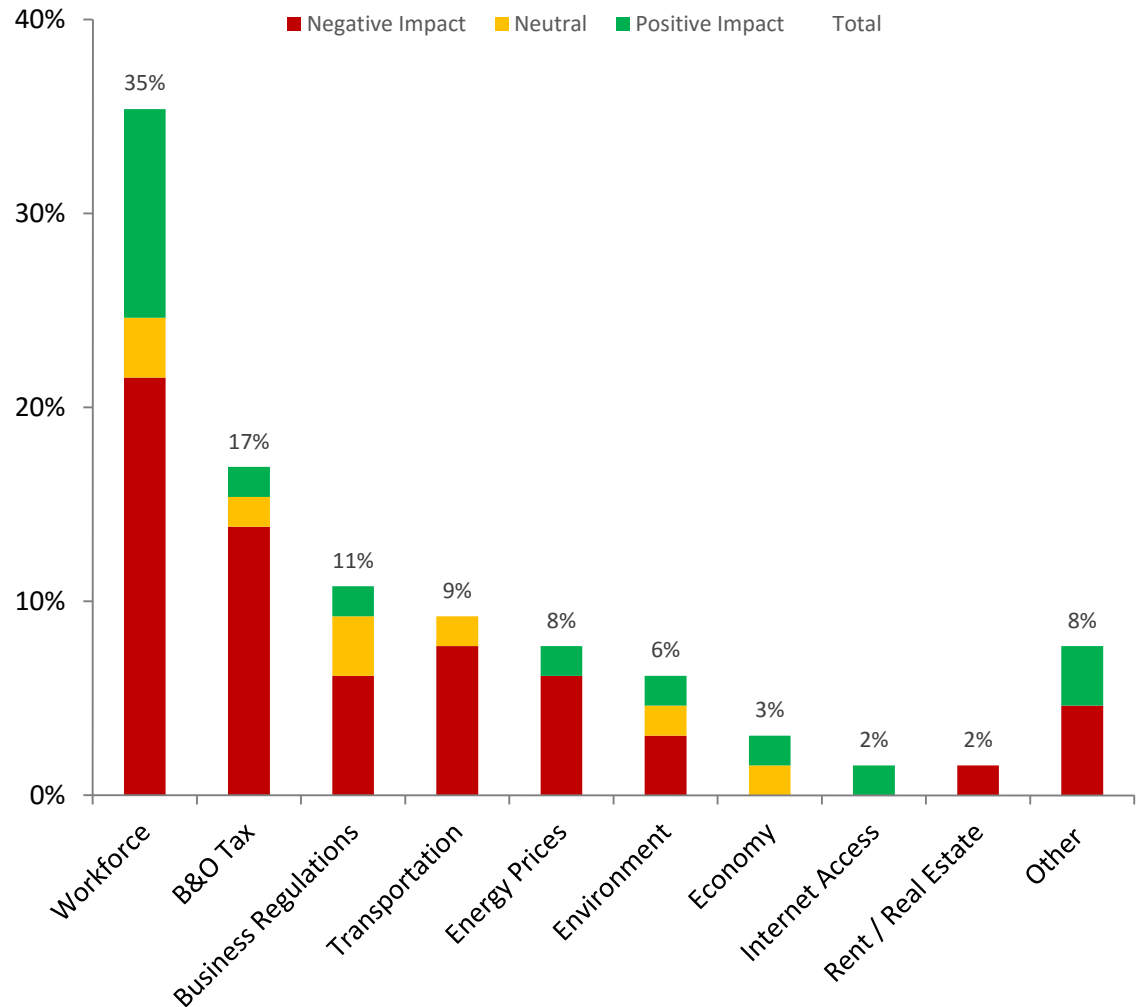
Tourism

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

Twice 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.

Figure 26: Factors With the Biggest Impact – Tourism



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=65)

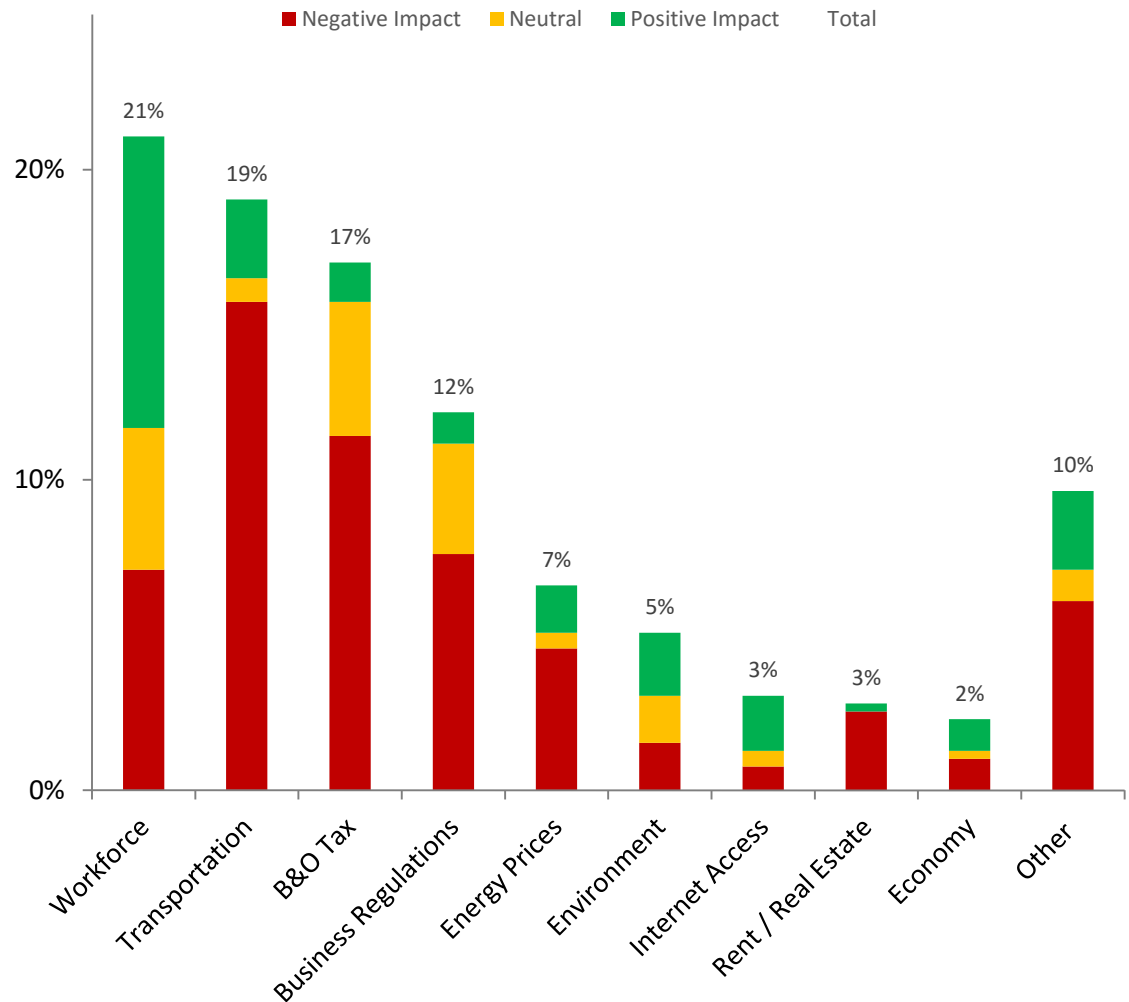
Other businesses

The workforce is also the most mentioned factor to “Other” businesses in Bellevue.

The remaining businesses have mixed feelings as to whether that impact will be positive or negative.

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

Figure 27: Factors With the Biggest Impact – “Other” Sector



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=394)

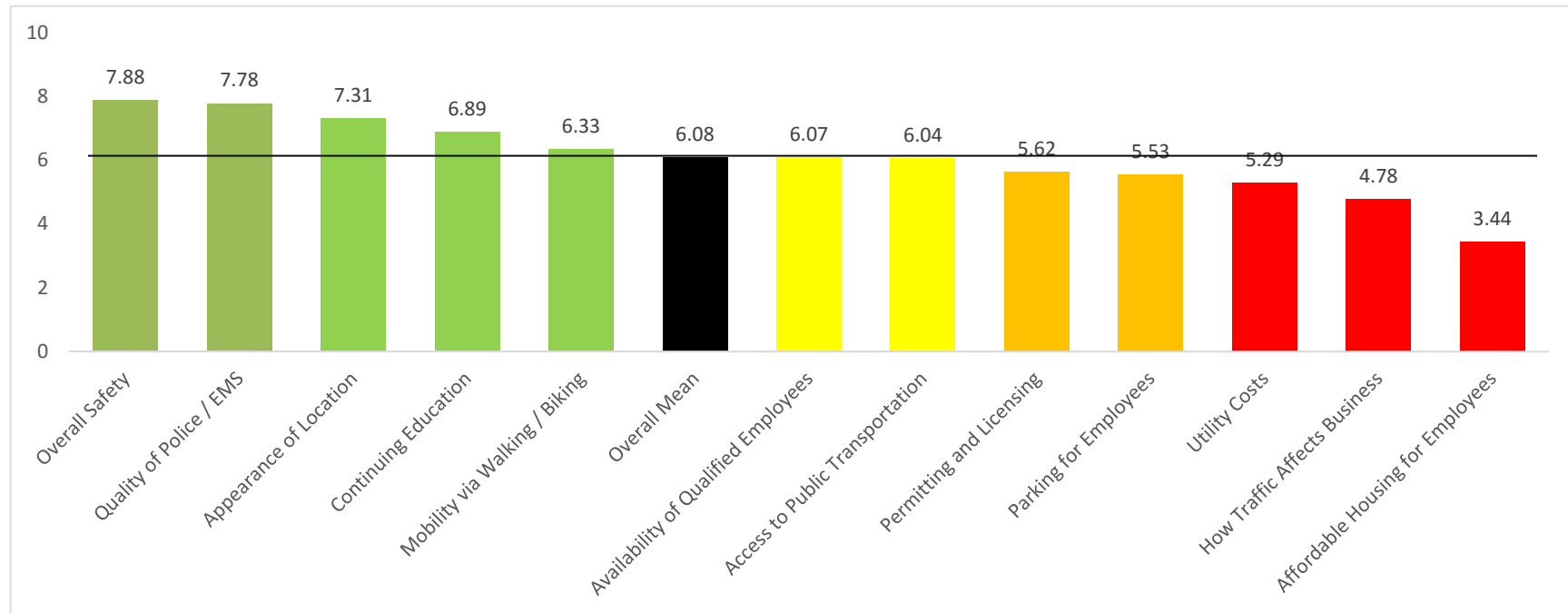
KEY FINDINGS—COMMUNITY CHARACTERISTICS

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 6.08 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 performs better than other cities and towns in areas focused around safety and appearance. Bellevue is underperforming in areas regarding traffic and affordability.

Figure 28: 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 (n=917)

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

BUSINESS ATTRIBUTES

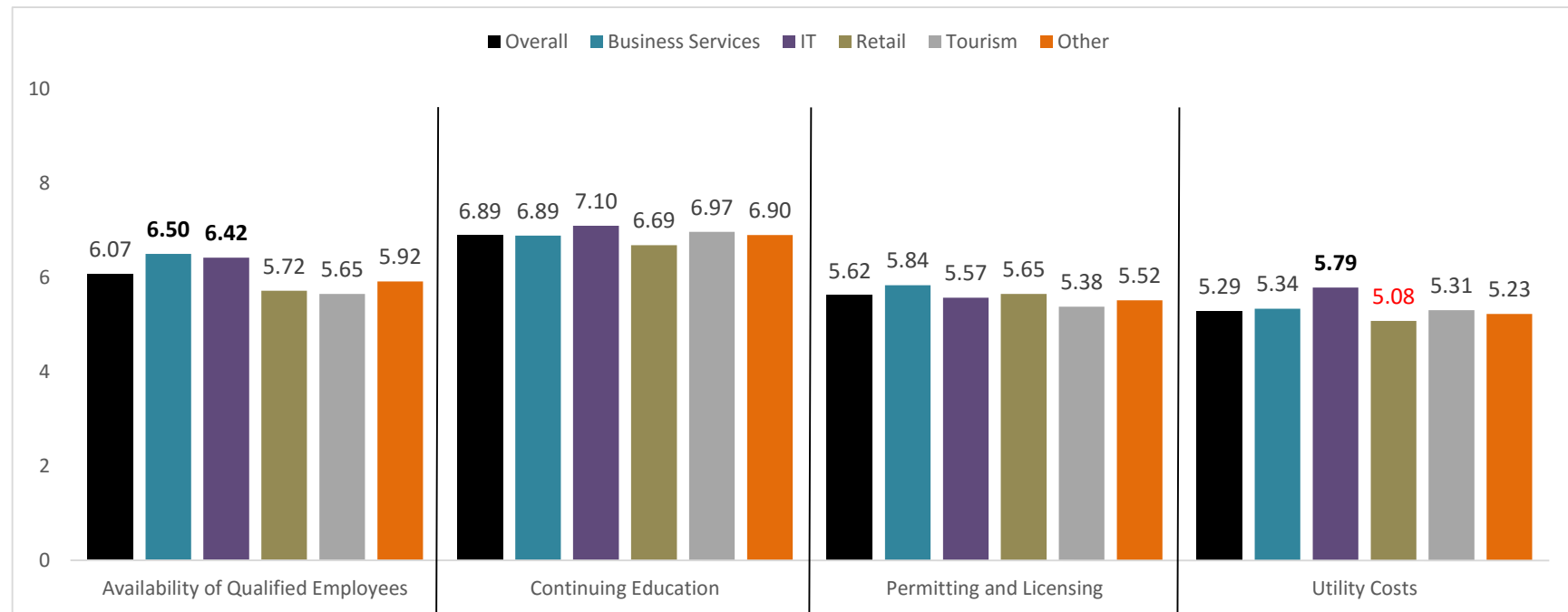
Availability of Qualified Employees: Businesses in the Business Services and Information Technology sectors rate Bellevue significantly higher than other businesses regarding the availability of qualified employees. Additionally, businesses with 5 or fewer employees provide higher ratings than larger businesses.

Continuing Education: Small businesses also rate the availability of continuing education significantly higher than larger businesses.

Permitting and Licensing: Businesses founded during the 1990's and later provide higher ratings than older businesses regarding development services such as permitting and licensing.

Utility Costs: Information Technology businesses provide significantly higher ratings than other businesses regarding utility costs. Retail businesses give Bellevue the lowest rating.

Figure 29: Business Attributes 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 (n=917)

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

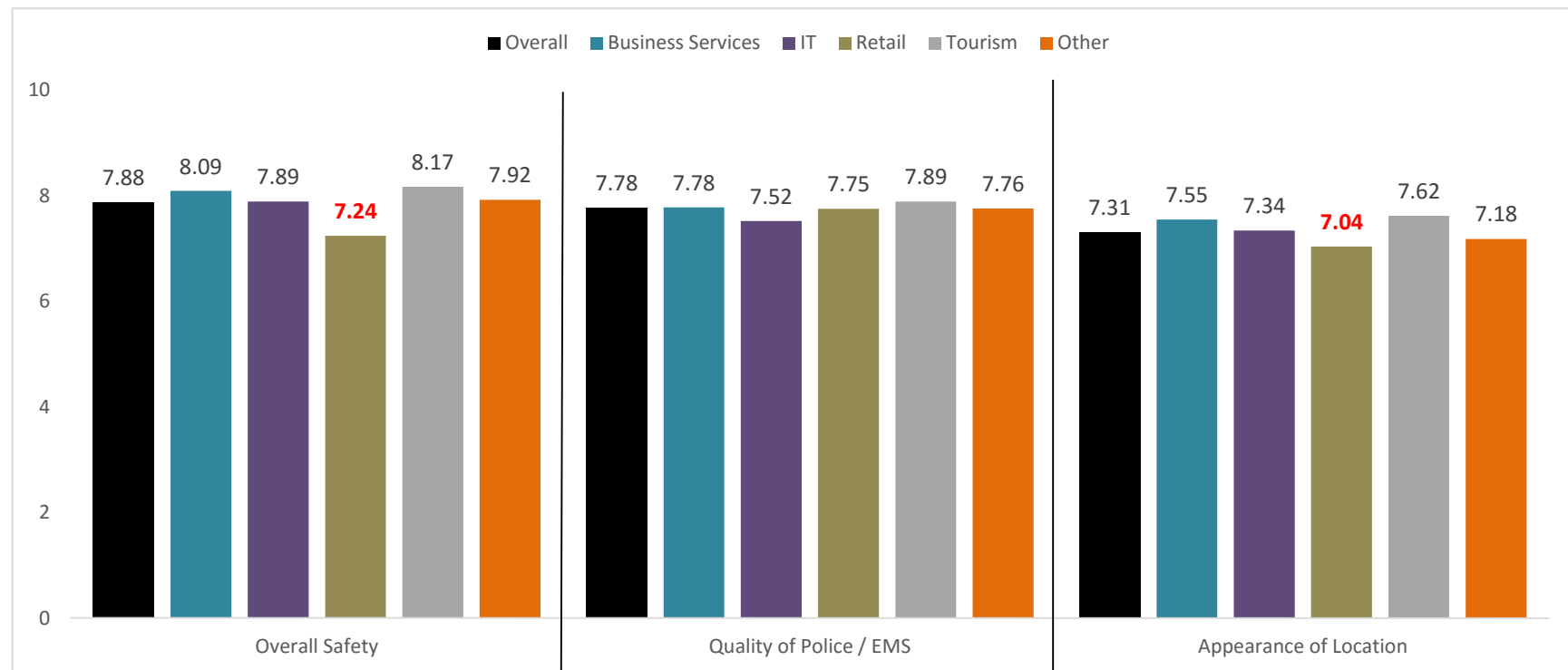
PHYSICAL ATTRIBUTES

Overall Safety: Retail businesses provide lower ratings than other businesses regarding the overall feeling of safety. Ratings for overall feeling of safety are similar across all geographies.

Quality of Police / EMS: Businesses founded in the 21st century rate the quality of police and EMS services significantly lower than businesses founded prior to 2000. Ratings for and quality of police and EMS services are similar across all geographies.

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. Retail businesses also provide lower ratings than other businesses regarding the appearance of the location.

Figure 30: Safety Attributes 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 (n=917)

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 are similar across all geographies and sectors.

Access to Public Transportation: Tourism and IT businesses rate access to public transportation significantly higher than other sectors. In addition, businesses located in Downtown Bellevue and Eastgate/Factoria rate the availability of public transportation higher than businesses located in other areas.

Parking for Employees: Conversely, businesses located in Downtown Bellevue and Eastgate/Factoria give the lowest ratings for availability of parking for their employees.

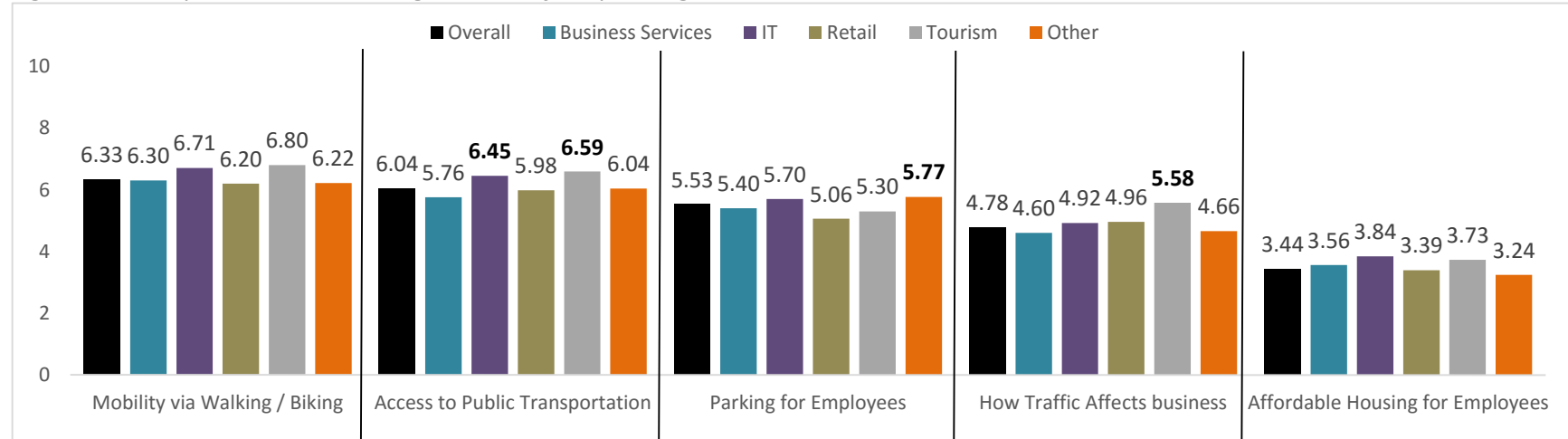
Traffic Impacts: Tourism businesses give the traffic impacts the highest rating. Ratings for the extent to which vehicle traffic affects the business are similar across all geographies.

Affordable Housing: Ratings for the range of affordable housing options for employees are consistently low across all geographies and sectors.

Tourism businesses provide the highest ratings in 4 out of 5 transportation related attributes. While Retail businesses have the lowest ratings for 3 out of 5 transportation related attributes. There are no differences in responses based on the age or size of businesses.

There is little variation in responses between assigned and self-reported business location.

Figure 31: Transportation and Housing Attributes 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 (n=917)

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

KEY FINDINGS—BUSINESS HEALTH

CURRENT ECONOMIC STRENGTH OF BUSINESS

All Businesses

Overall, 80 percent of businesses state that the economic strength of their business is “somewhat” or “very” strong.

By Sector

Business Services and “Other” businesses indicate having the strongest economic strength while Information Technology and Retail Businesses feel the weakest—14 percent of Information Technology 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.

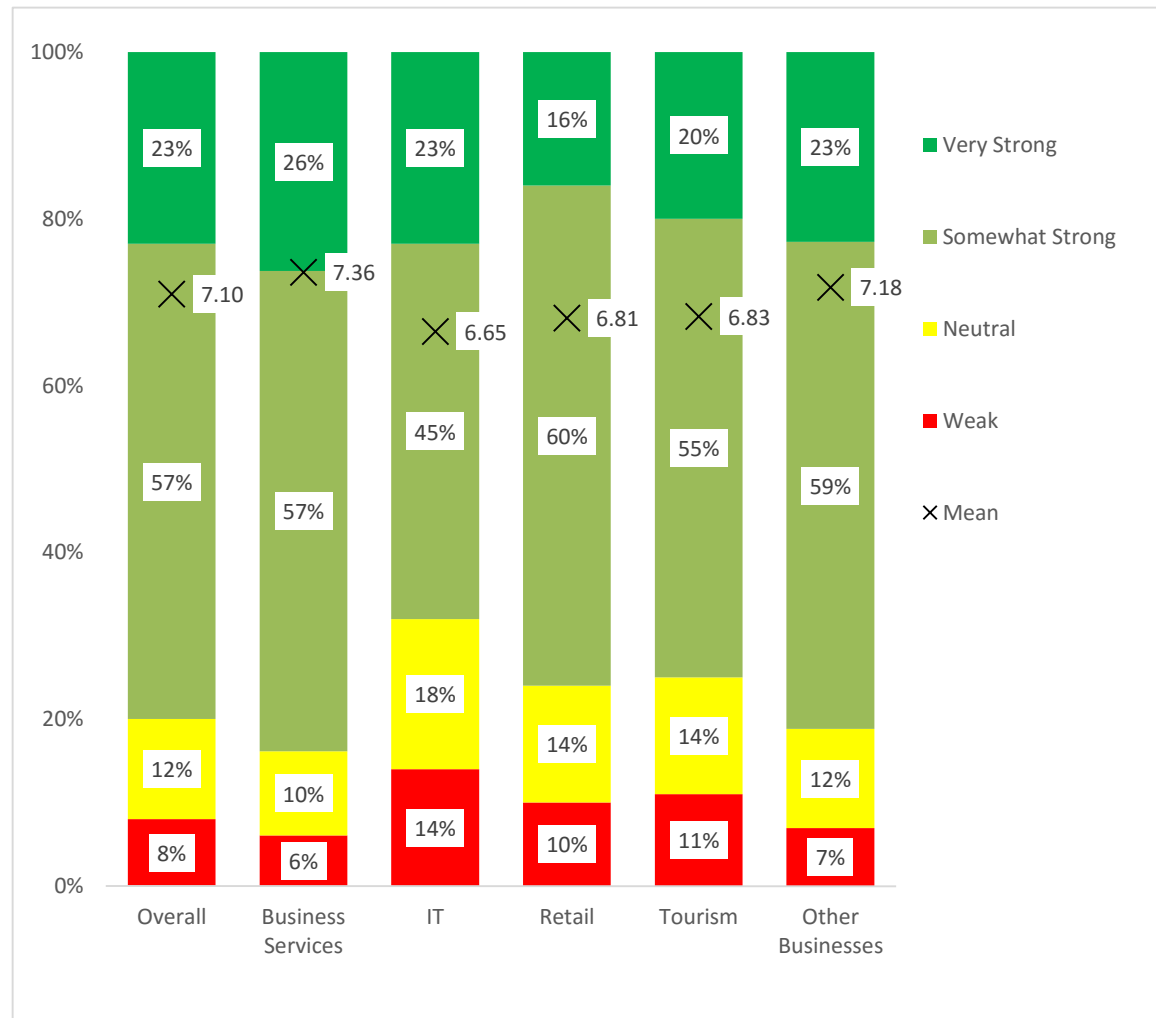
By Age

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

By Location?

Businesses located in downtown Bellevue (both assigned MEC and self-reported), indicate having the strongest economic strength.

Figure 32: Economic Strength of Business



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

Base: All respondents (n=917)

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

ANTICIPATED ECONOMIC STRENGTH OF BUSINESS

All Businesses

Sixty-two percent (62%) of businesses indicated they expect the strength of their business to improve over the next three to five years. There is little difference across business sectors.

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—28 percent feel that their business will improve significantly.

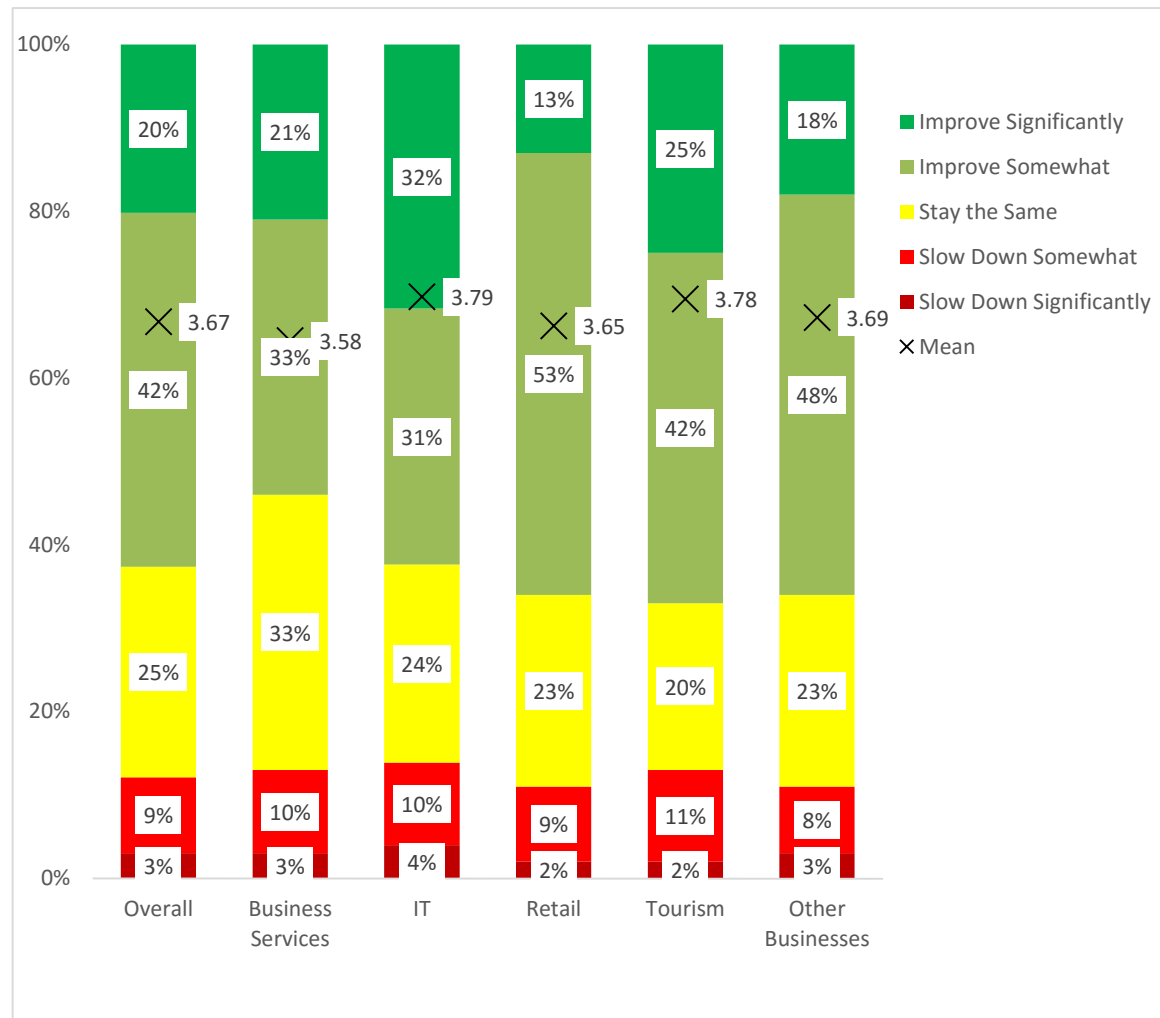
By Size

Small businesses are significantly less confident than mid-sized and large businesses that their economic strength will improve over the next few years—33 percent of these businesses indicate they expect it to remain the same.

By Location?

Businesses located in Factoria (both assigned MEC and self-reported) are the most likely to anticipate the economic strength of their business will slow down over the next 3-5 years.

Figure 33: Anticipated Economic Strength of Business



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

ANTICIPATED CHANGES TO CAPITAL EXPENDITURES

All Businesses

The majority 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 rather than a decrease. There is little difference across business sectors.

By Size

Expected expenditures increases with business size.

By Age

Thirty-one percent (31%) of small businesses anticipate an increase over the next few years compared to 45 percent of mid-sized businesses and 66 percent of large businesses.

Figure 34: Anticipated Changes to Capital Expenditures



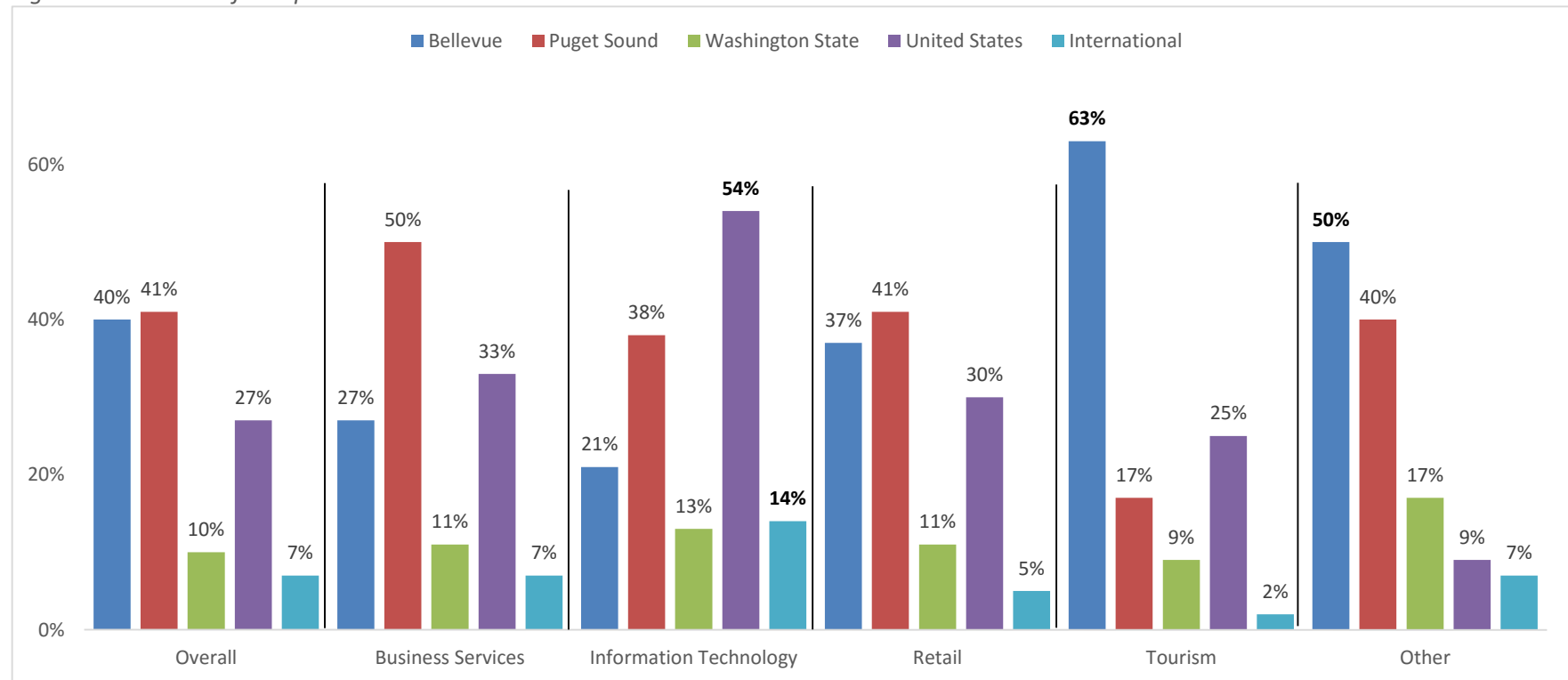
BC4_2—Please indicate below any anticipated changes to capital expenditures in your business over the next 12 months.
 Base: All respondents (n=917)
 Mean based on a 5 point scale from 1 to 5

LOCATION OF COMPETITORS

The majority of competitors are located regionally – either in Bellevue or elsewhere in the Puget Sound, however there are differences according to business sector. Businesses in the Information and Technology sector are significantly more likely to state they have competitors elsewhere in the United States and internationally than all other sectors. While Tourism and Other businesses are significantly more likely to state their competitors are located within Bellevue.

Small businesses are significantly more likely to be competing against other businesses in Bellevue whereas mid-size and large businesses are most likely to be competing against other businesses in the Puget Sound.

Figure 35: Location of Competitors



ST2— Geographically, where are your biggest competitors located?

Base: All respondents (n=917)

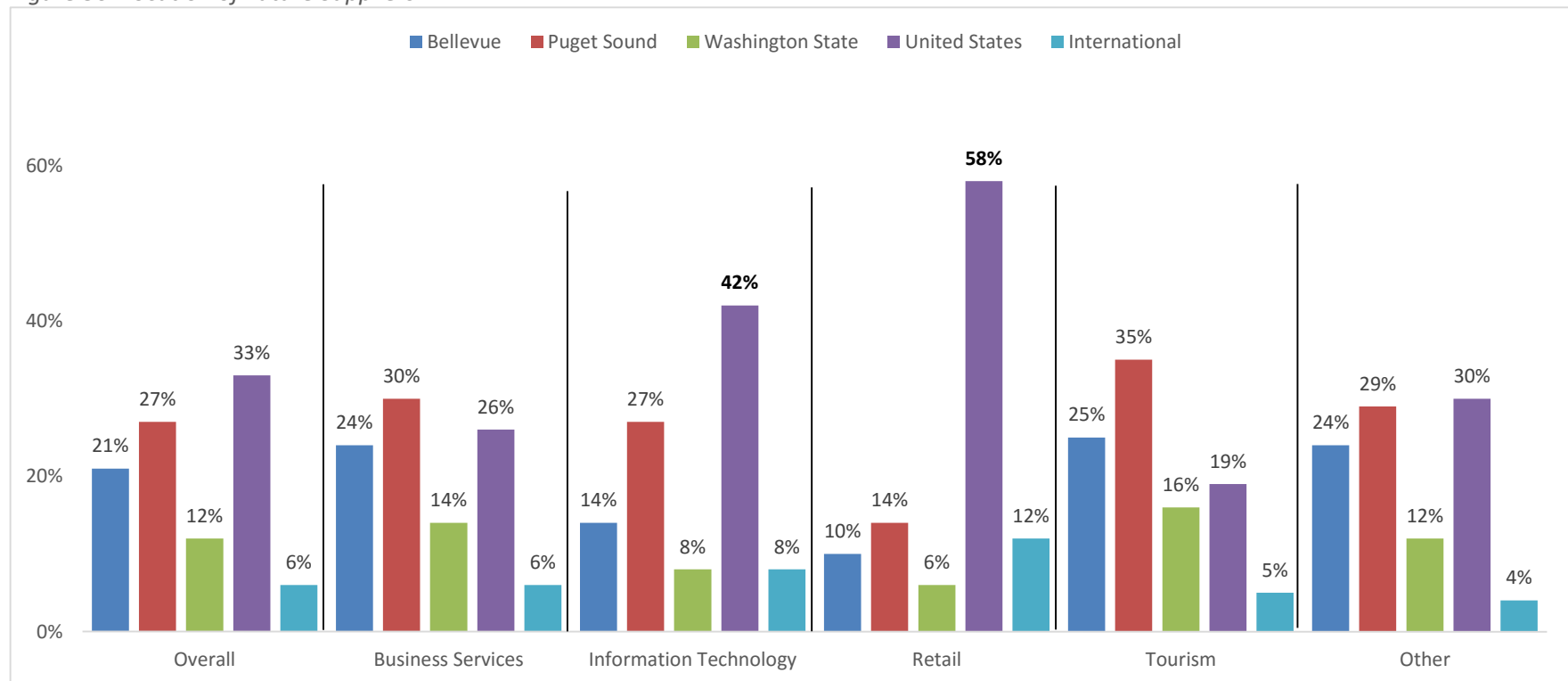
LOCATION OF FUTURE SUPPLIERS

One-third of businesses indicate the majority of their future suppliers will be located nationally. Twenty-seven percent (27%) anticipate future suppliers will be located elsewhere in the Puget Sound and 21 percent say their suppliers will be in Bellevue.

Information Technology and Retail businesses are significantly more likely than other businesses to state their suppliers will be located across the United States. Retail businesses are least likely to have suppliers in Bellevue or the Puget Sound.

Small businesses are significantly more likely to state their future suppliers will be in Bellevue while mid-size and large businesses are significantly more likely to state their future suppliers will be elsewhere in the Puget Sound.

Figure 36: Location of Future Suppliers



ST4— In the future, where do you expect the majority of your suppliers will be located?

Base: All respondents (n=917)

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KEY FINDINGS –EMPLOYEES AND STAFFING

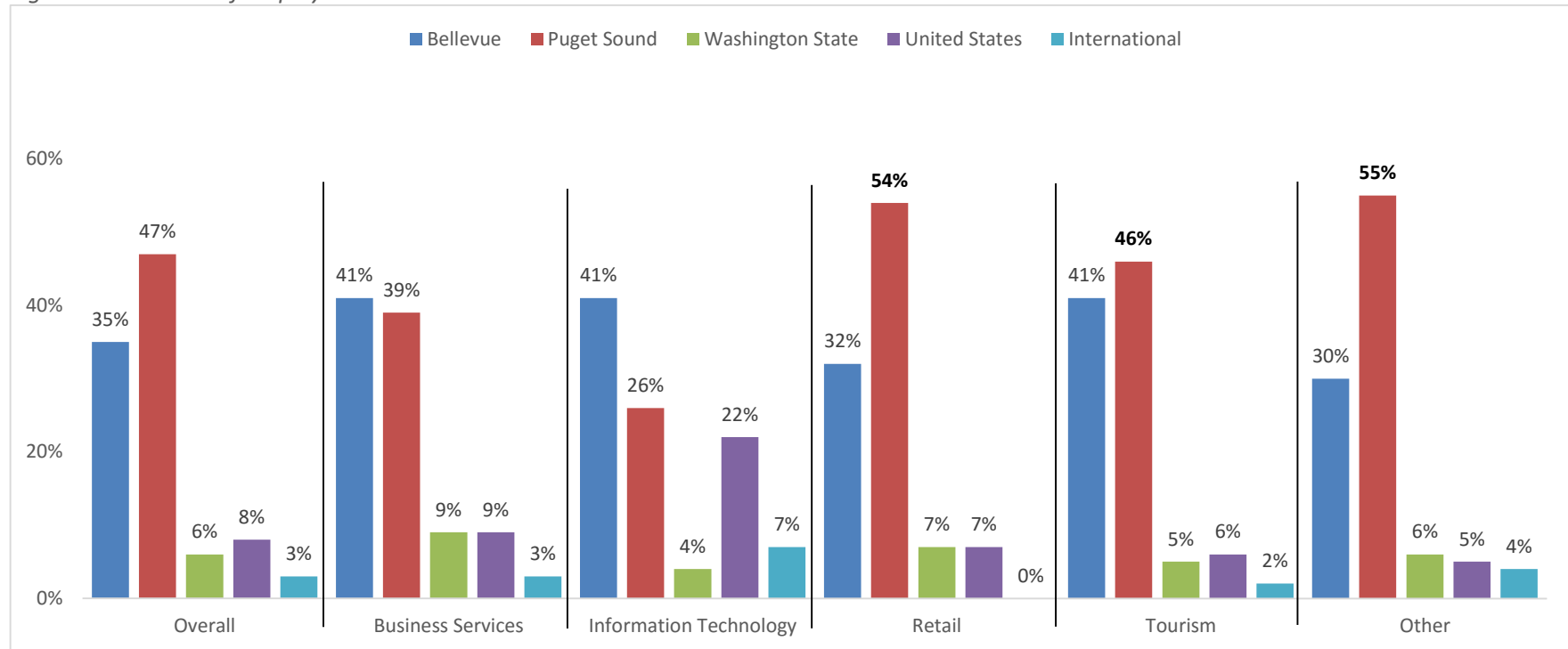
LOCATION OF EMPLOYEE TALENT POOL

The vast majority of the employee talent pool is located 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 perform nationwide searches for qualified employees.

Retail, Tourism, and Other businesses primarily find their employees across the Puget Sound—significantly more likely than Business Services and 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 37: Location of Employee Talent Pool



ST3— Where is your employee talent pool located?

Base: All respondents (n=917)

ANTICIPATED CHANGES TO EMPLOYEES

All Businesses

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

By Sector

Businesses in Tourism or the “Other” sector are the most likely to anticipate an increase in the number of employees—significantly more so than Business Services.

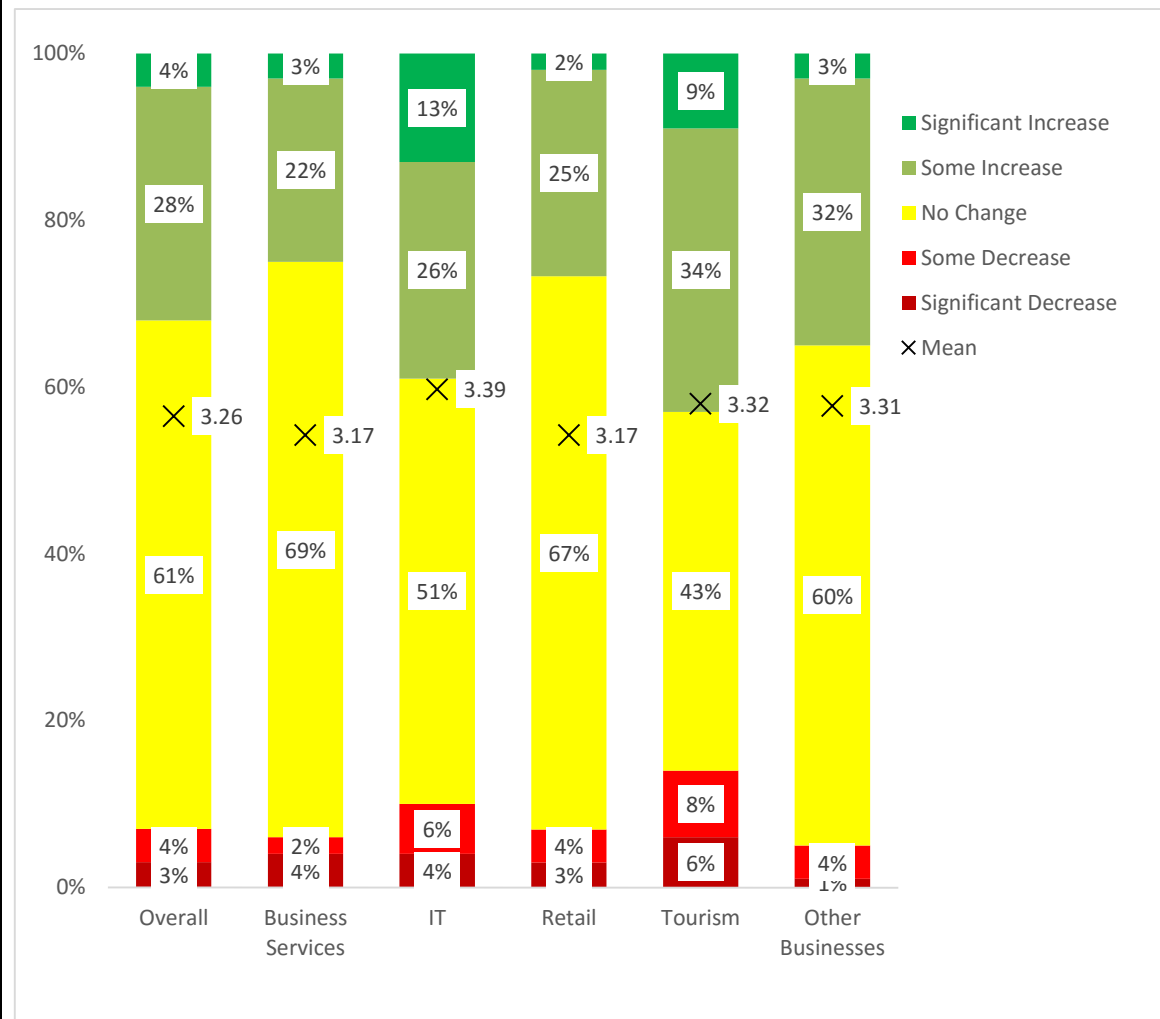
By Size

Sixty percent (60%) of large businesses expect an increase in the number of employees.

By Age

Businesses founded in 2010 or later are significantly more likely than business founded prior to 2010 to anticipate increasing the number of employees.

Figure 38: Anticipated Changes to Number of Employees



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=917)

Mean based on a 5 point scale from 1 to 5

The most commonly expected type of employees needed are Customer Service/Sales, Professional/Managerial, and Office/Administrative positions.

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

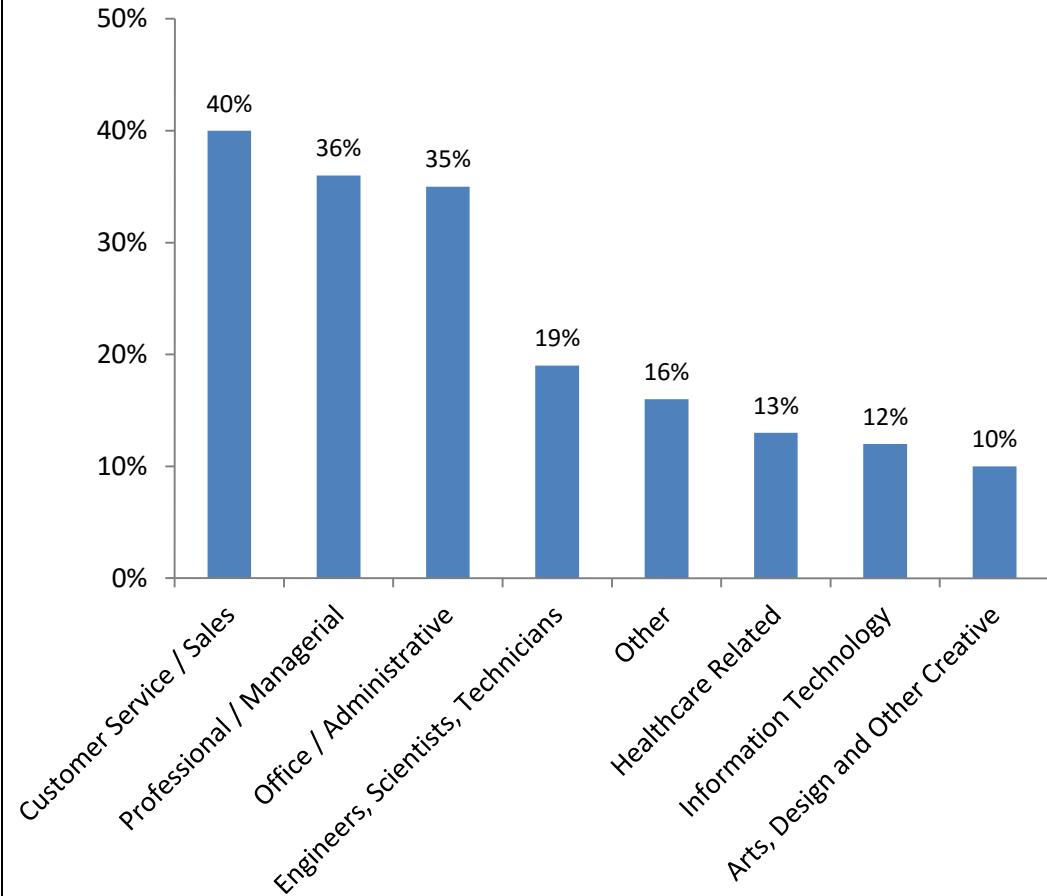
Business Services are the most likely to anticipate needing Professional/Managerial employees.

Demand for Office/Administrative employees is strong across Business Services, Information Technology and Other businesses.

Demand for Professional/Managerial and Engineer/Scientists/Technicians is highest among large employers.

Small employers are primarily looking for Customer Service/Sales and, Professional/Managerial, and Office/Administrative employees.

Figure 39: Anticipated Types of Employees to be Hired



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 (n = 291)

ABILITY TO FIND TRAINED / QUALIFIED STAFF

All Businesses

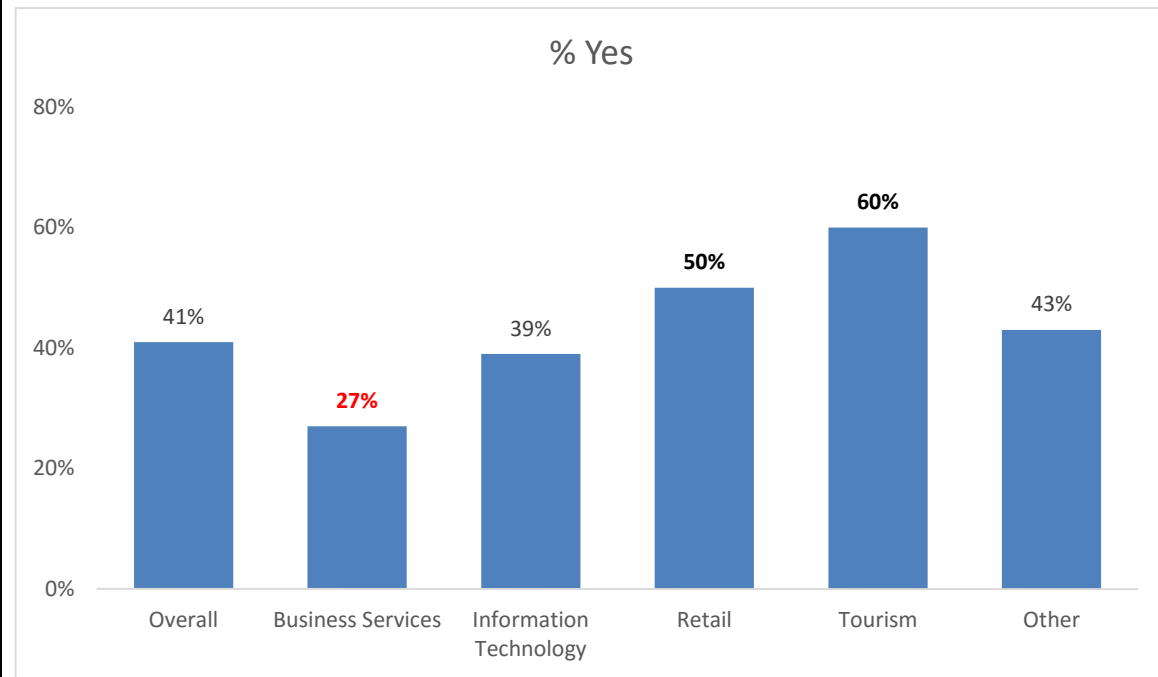
Forty-one percent (41%) of businesses state that they have had difficulty finding trained and/or qualified staff over the past 12 months.

By Sector

Retail and Tourism indicate having the most difficult time—half of Retail businesses and 60 percent of Tourism businesses report having difficulty finding trained and qualified staffing.

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

Figure 40: Percent of Businesses that have Difficulty Finding Trained and Qualified Staffing



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

Base: All respondents (n=917)

KEY FINDINGS—BROADBAND INTERNET

TECHNOLOGY SERVICES SUBSCRIBED TO

Nearly all businesses have internet access. Over 90 percent of businesses have internet access in all sectors except for the “Other” businesses sector.

Figure 41: Technology Services Currently Subscribed To

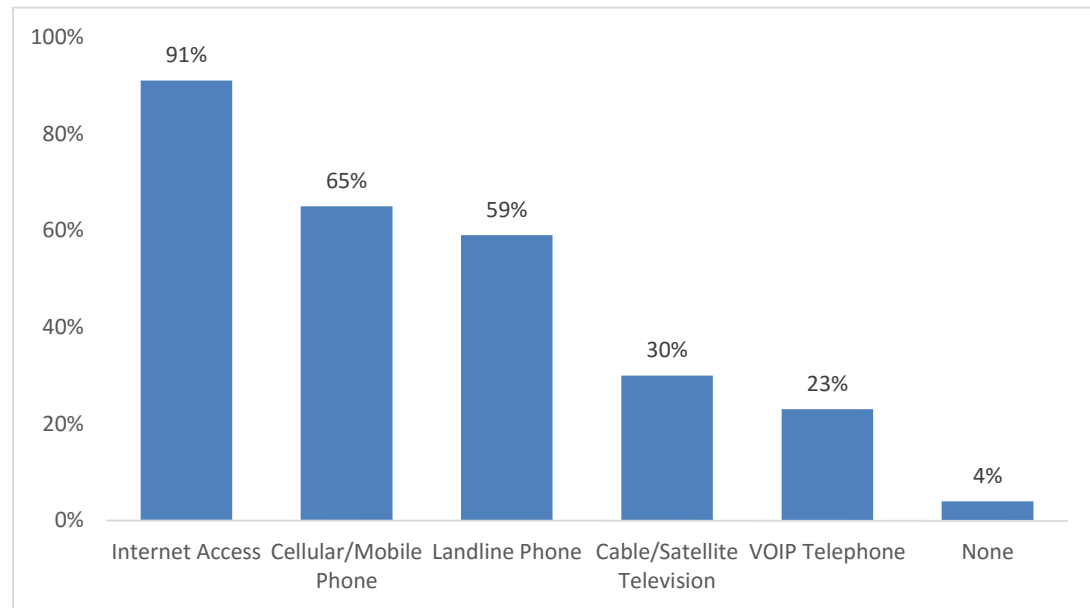
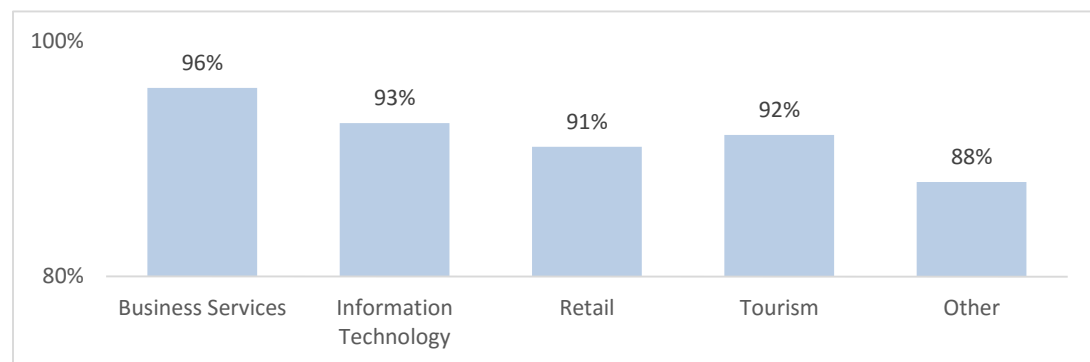


Figure 42: Internet Access by Business Sector



BB1— Which of the following services does your business currently have?
Base: All respondents (n=917)

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.

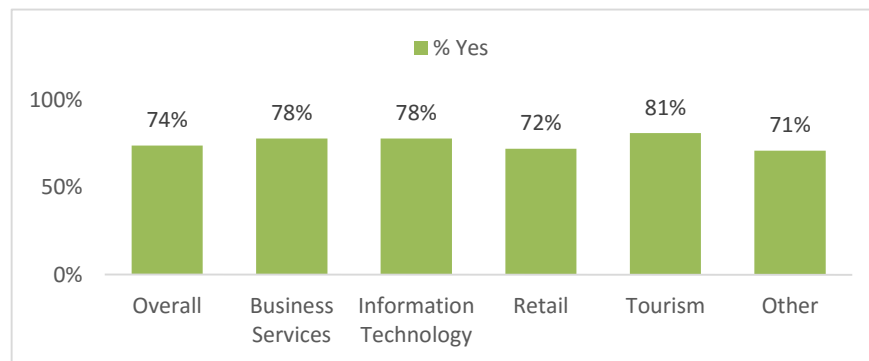
Three quarters of businesses claim that their existing internet service meets their current needs and there are no significant difference across business sectors. Businesses in the State Route 520 / Bel-Red corridor are significantly less likely to say their existing internet meets their needs.

When asked about the next two to three years, 58 percent of businesses state that their existing internet speed will meet their business needs. Similar to current needs, there are no significant differences across business sectors.

Only half of businesses located along State Route 520 / Bel-Red feel that their current speeds will meet their needs in the next few years.

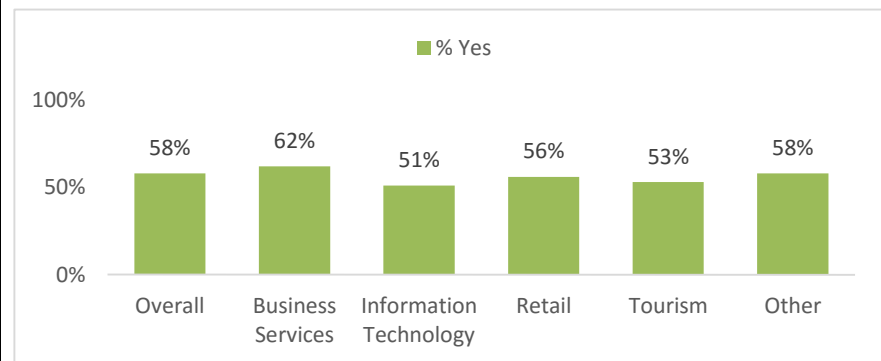
Confidence in future internet speeds decreases as business size increases. Mid-sized and large businesses are significantly less likely than small businesses to feel that their existing internet speed will meet future needs.

Figure 43: Adequacy of Current Internet Service



BB2— Does your existing internet speed/bandwidth meet your current needs?
Base: Respondents with Internet Access (n=837)

Figure 44: Anticipated Adequacy of Future Internet Service



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 (n=837). Respondents who indicated internet did not meet current needs were recoded as "no" for meeting future needs here.

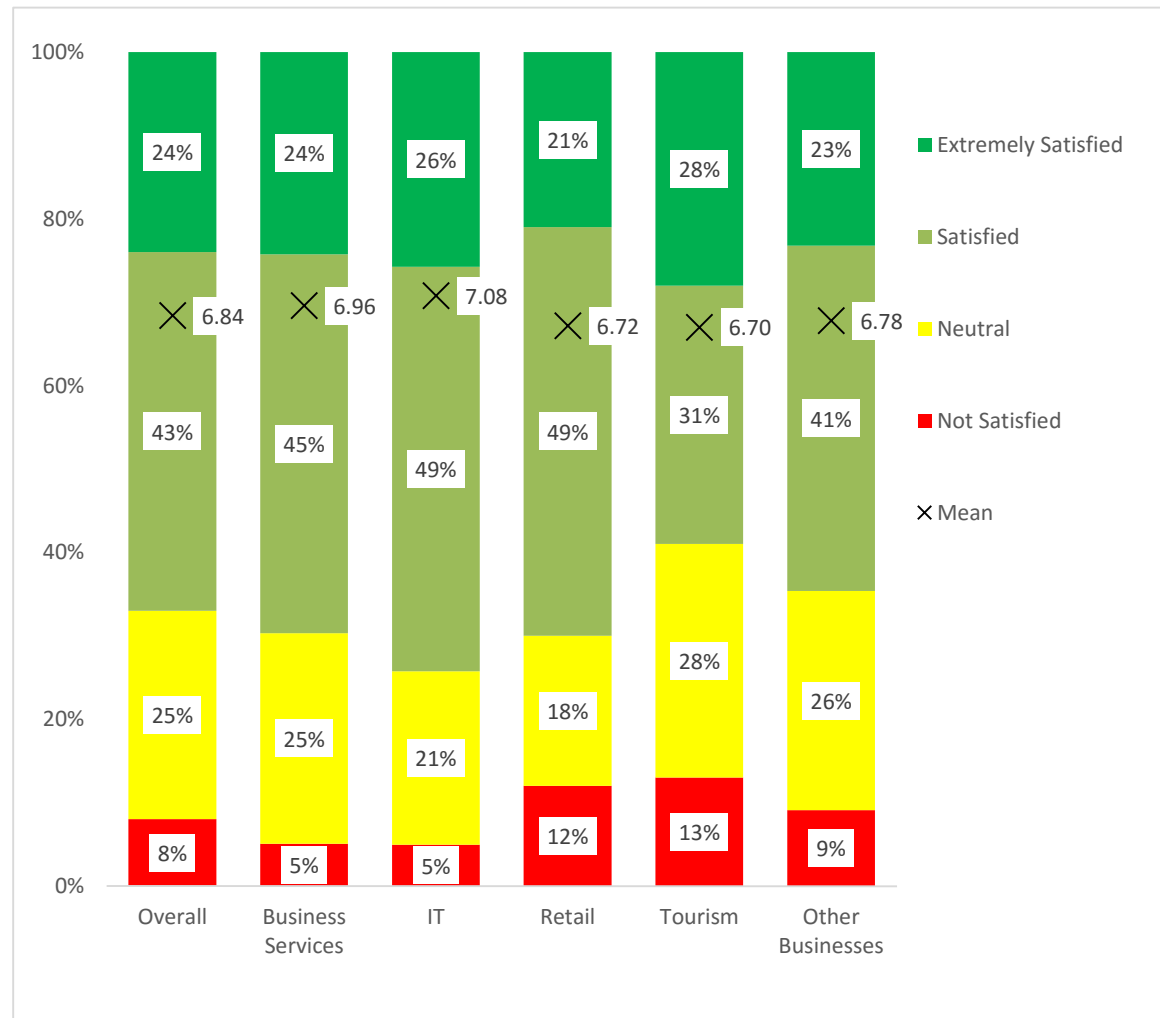
KEY FINDINGS—ADDITIONAL TOPICS

CUSTOMER SERVICE RELATED TO TAXES

Two-thirds of businesses are satisfied with the customer service they receive when dealing with their Bellevue Taxes.

There are no differences across business sectors. However, small businesses are significantly more satisfied than mid-sized and large businesses.

Figure 45: Satisfaction Related to Customer Service Dealing with Bellevue Taxes



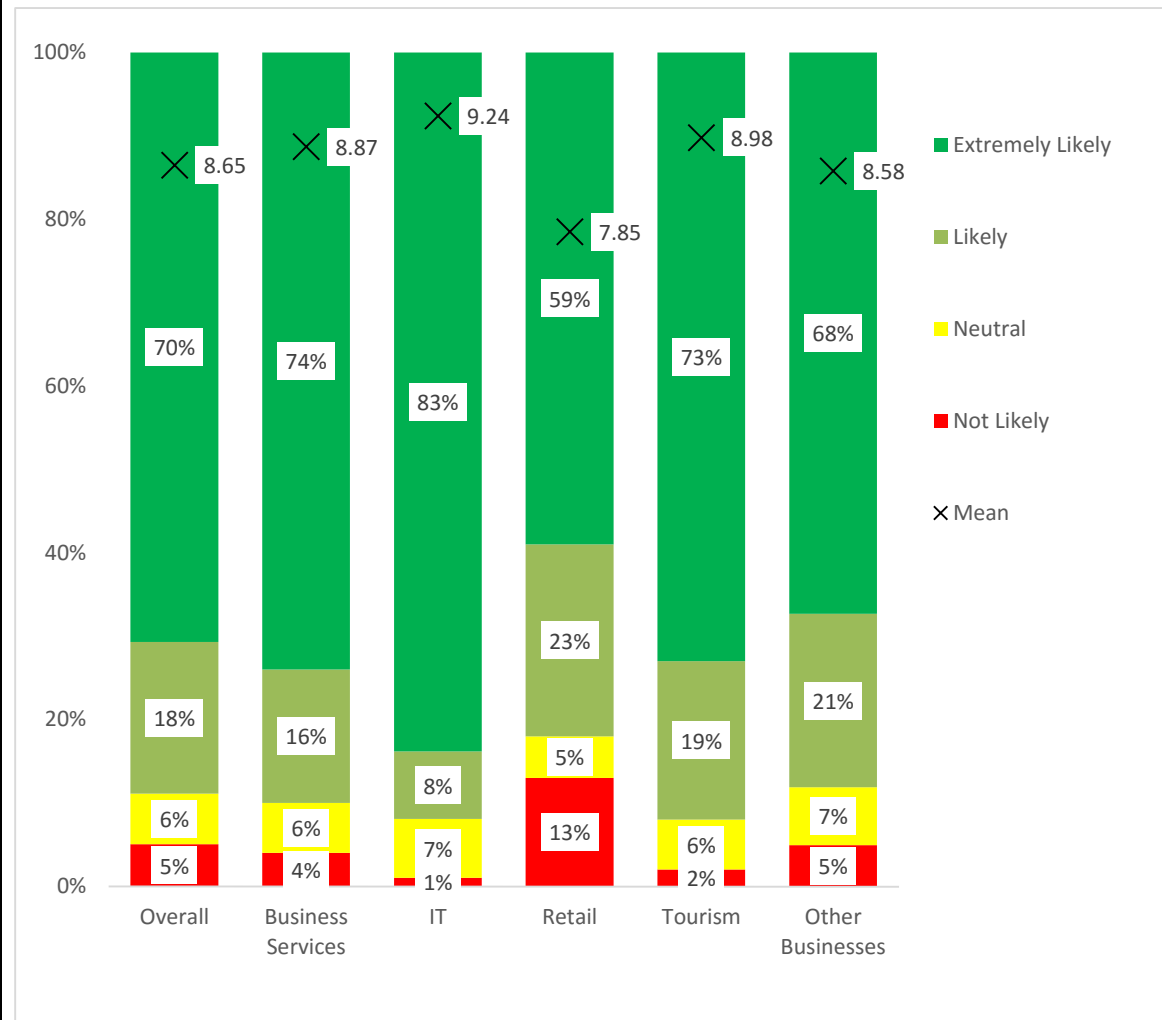
CC2— How satisfied are you with the customer service you receive when dealing with your Bellevue business Taxes?
Base: All respondents (n=917)

LIKELIHOOD OF FILING TAXES ONLINE

Nearly all businesses are likely, and seventy percent (70%) of businesses state they would be “Extremely likely” to file their Bellevue business taxes electronically if it were available.

While the majority of Retail businesses are likely to do so, they are significantly less likely than other businesses to say they would file online.

Figure 46: Likelihood of Filing Business Taxes Electronically



CC3— If it were available, how likely would you be to file your Bellevue business taxes electronically?
Base: All respondents (n=917)

USE OF ADVISOR

All Businesses

Overall, 19 percent of businesses have used an advisor in the past three years to help with small business development.

By Sector

Use of advisors is significantly higher among businesses in the Tourism sector.

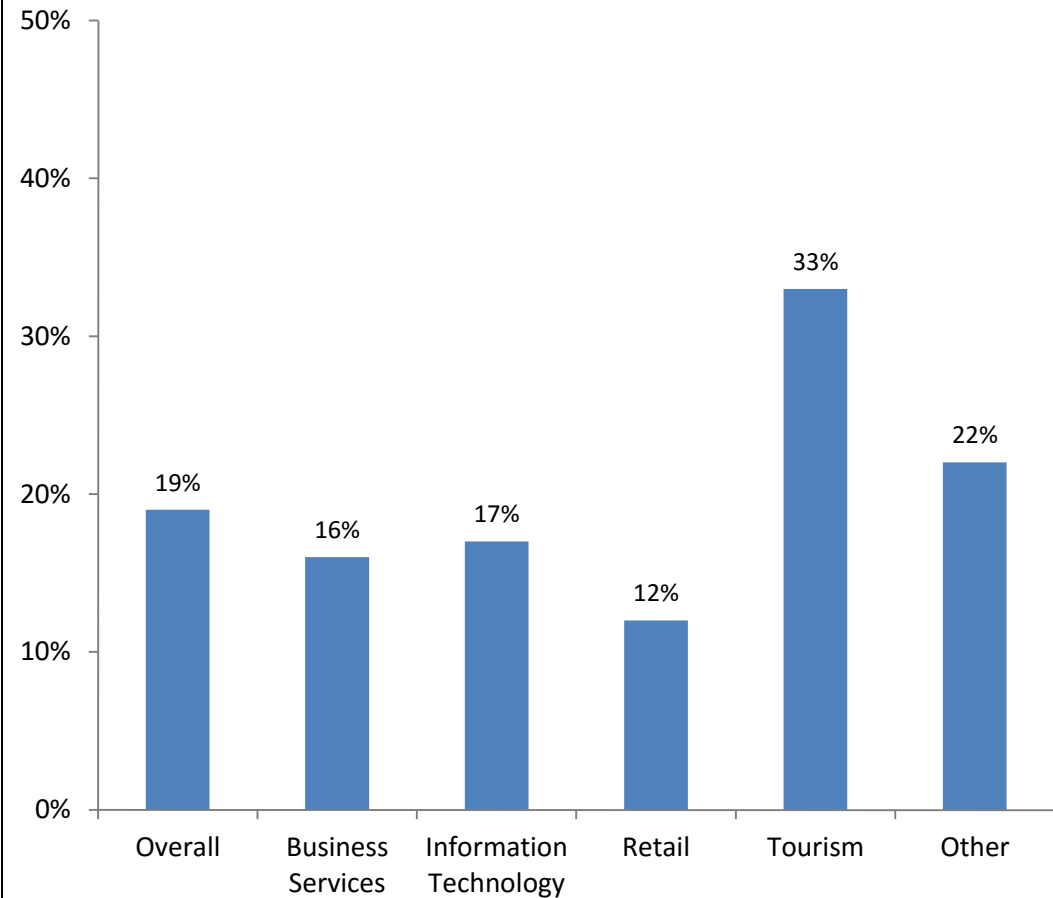
By Size

Mid-Sized businesses are significantly more likely than small businesses to have used an advisor for help with small business development indicating that small businesses either may not be aware of nor have time to manage this service.

By Age

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

Figure 47: Value of Services



ST8—Have you used an advisor to help you with small business development within the last three years?
 Base: All respondents (n=917)

INCENTIVES FOR ALTERNATIVE TRANSPORTATION

All Businesses

In all, only 17 percent of businesses offer an incentive to employees for alternative transportation. In general, very few businesses that do not offer incentives are considering doing so.

By Sector

Retail and “Other” businesses are the least likely to offer transportation incentives and Information Technology businesses are the most likely.

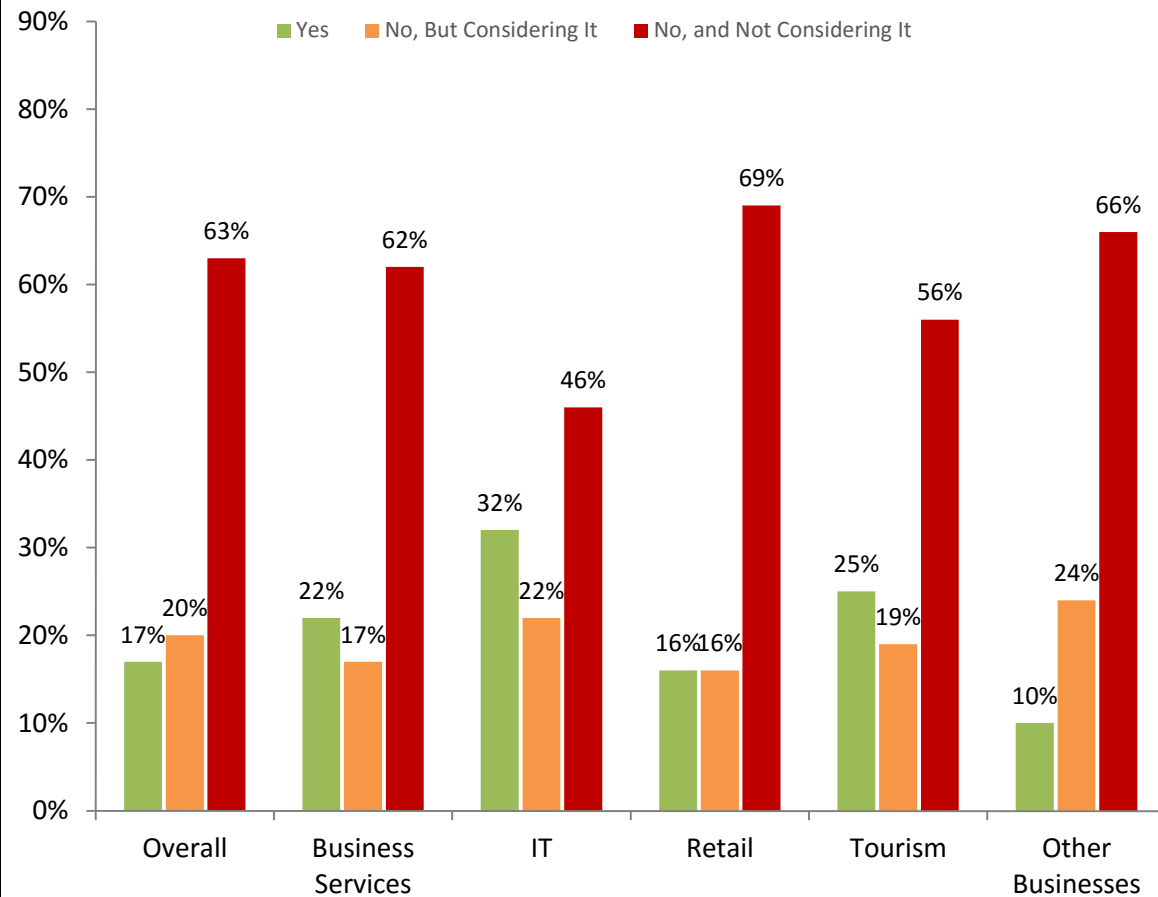
By Size

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 48: Incentives for Alternative Transportation



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 (n=917)

APPENDIX I – DEMOGRAPHIC PROFILE OF BUSINESSES

Position Within Company	Owner	70%
	C-Level	8%
	Manager	13%
	Admin/Clerical	7%
	Other	2%
Own vs. Lease Workspace	Own	30%
	Lease	70%
Number of Locations in Bellevue	One	86.7%
	2 to 5	12.5%
	6 to 10	0.4%
	11 or more	0.3%
	<i>Mean</i>	<i>1.20</i>
Number of Employees	One	21%
	2 to 5	34%
	6 to 10	19%
	11 to 24	13%
	25 to 49	6%
	50 to 99	3%
	100 or more	4%
	<i>Mean</i>	<i>24.40</i>
Year Established	Prior to 1980	6%
	1980s	11%
	1990s	15%
	2000s	31%
	2010 or later	37%

APPENDIX II—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 14 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 2: 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				
SR 520/Bel-Red	42	201	243	26%	2586	23%	9%	6.0%
Crossroads	4	10	14	2%	222	2%	6%	25.4%
Downtown	30	136	166	18%	2246	20%	7%	7.3%
Eastgate/Factoria	16	51	67	7%	843	7%	8%	11.5%
116th/Bellefield	3	68	71	8%	730	6%	10%	11.1%
Outside MEC	52	304	356	39%	4816	42%	7%	5.0%
Total	147	770	917	100%	11,443	100%	8%	3.1%

Businesses were also asked to self-report their geographic location. This was done to verify or cross-reference the MEC groupings performed by the city. While most businesses provided similar self-reported geographies, there was some discrepancy between assigned MEC and self-reported geography, notably in Crossroads where the number of self-reported businesses is significantly higher than the number assigned to the MEC.

Tables three and four and figure 49 provide detailed information comparing self-reported to assigned geographic locations.

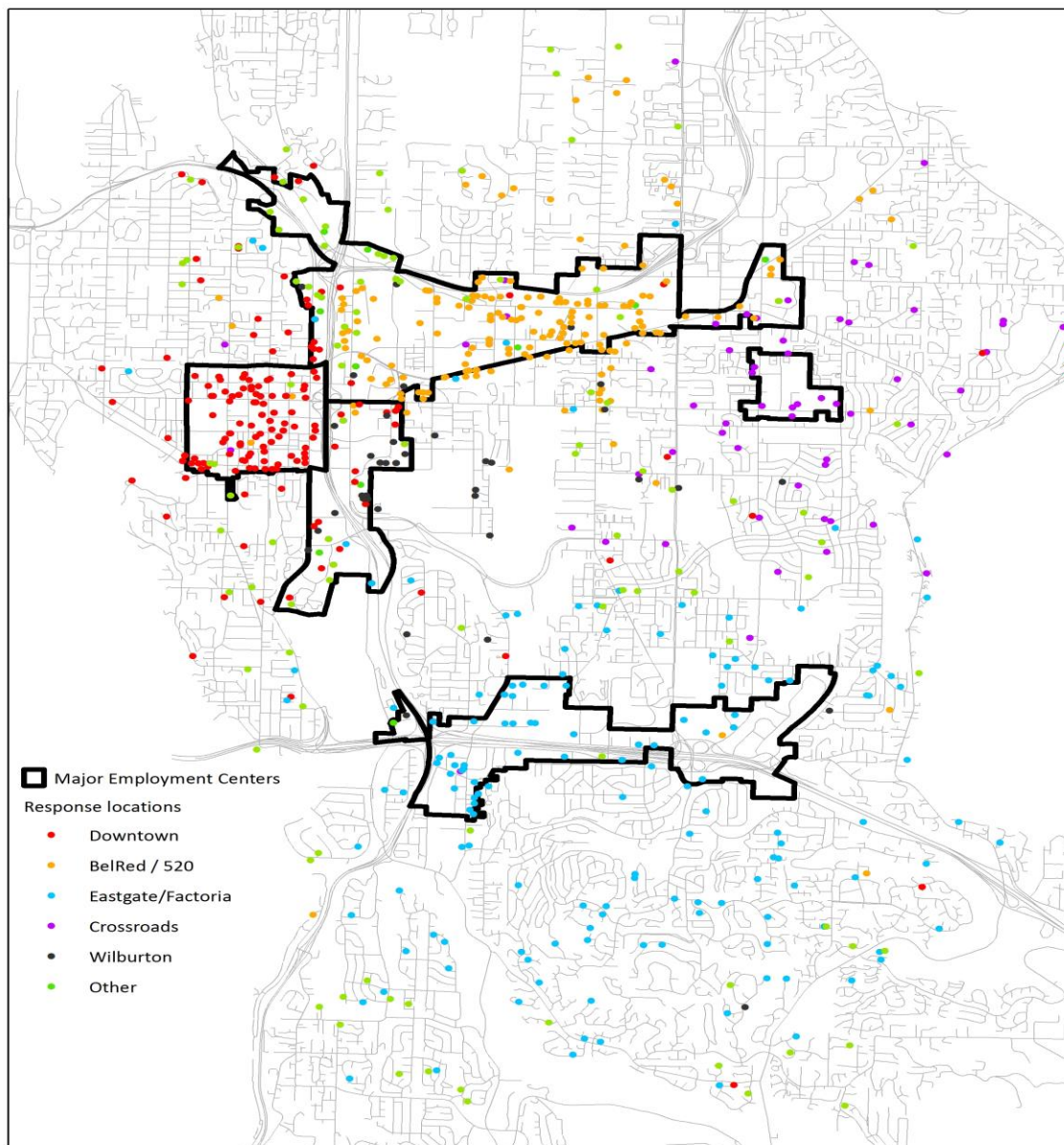
Table 3: Distribution of Completed Surveys – by Self-reported Geographic Area

	Completed Surveys				Margin of Error at 95% confidence
	Phone		Total		
Bel-Red/520	42	195	237	26%	6.3%
Crossroads	15	65	80	9%	10.9%
Downtown	34	228	262	29%	6.0%
Eastgate	15	72	87	9%	10.5%
Factoria	16	78	94	10%	10.1%
Wilburton	3	41	44	5%	14.8%
Other	22	91	113	12%	9.2%
Total	147	770	917	100%	3.1%

Table 4: Geographic Distribution of Completed Surveys Crosstabulation – Self-Reported by MEC from Sample

		Major Employment Center from Sample						Total
		SR 520 / Bel-Red	Crossroads	Downtown	Eastgate / Factoria	116 th / Bellefield	Outside MEC	
Self-Reported Geographic Areas	Bel-Red/520	165	1	3	1	3	64	237
	Crossroads	14	13	1	2	2	48	80
	Downtown	31	0	156	1	32	42	262
	Eastgate	2	0	0	16	0	69	87
	Factoria	1	0	0	43	5	45	94
	Wilburton	8	0	0	1	18	17	44
	Other	22	0	6	3	11	71	113
	Total	243	14	166	67	71	356	917

Figure 49: Map MEC vs. Stated Geography



APPENDIX III—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 917 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 (11,443).

Table 5: Distribution of Completed Surveys – by Business Age (decade founded)

	Completed Surveys				Margin of Error at 95% confidence
	Phone	Web	Total		
Founded prior to 1980	10	46	56	6%	13.1%
Founded in the 1980's	17	83	100	11%	9.8%
Founded in the 1990's	30	108	138	15%	8.3%
Founded in the 2000's	38	241	279	31%	5.8%
Founded in 2010 or later	48	292	340	37%	5.2%
Total	143	770	913	100%	3.1%

Table 6: Distribution of Completed Surveys – by Size of Business

	Completed Surveys				Margin of Error at 95% confidence
	Phone	Web	Total		
1 – 5 Employees	62	404	466	55%	4.5%
5 – 49 Employees	61	257	318	38%	5.4%
50 Employees or More	12	49	61	7%	12.5%
Total	135	710	845	100%	3.1%

APPENDIX IV—VERBATIM TEXT

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

Business Cluster from sample												
	Overall (n=937)		Business Services (n=254)		Information Technology (n=73)		Retail (n=157)		Tourism (n=62)		Other (n=391)	
Traffic	242	31%	78	36%	16	24%	33	28%	12	21%	103	31%
Taxes	92	12%	16	7%	14	21%	21	18%	7	13%	34	10%
Parking	76	10%	25	12%	2	3%	16	14%	3	5%	30	9%
Affordability of real estate	75	10%	14	7%	9	13%	15	13%	4	7%	33	10%
Nothing	63	8%	18	8%	8	12%	3	3%	3	5%	31	9%
Transpiration	57	7%	23	11%	4	6%	6	5%	2	4%	22	7%
Growth and zoning issues	55	7%	15	7%	3	4%	6	5%	3	5%	28	8%
Support for small businesses	52	7%	12	6%	4	6%	9	8%	6	11%	21	6%
Lack of public transportation	32	4%	11	5%	1	1%	9	8%	5	9%	6	2%
Construction impacting my business	31	4%	6	3%	0	0%	11	9%	2	4%	12	4%
Government regulations	26	3%	4	2%	1	1%	4	3%	1	2%	16	5%
Infrastructure building and maintenance	15	2%	1	0%	5	7%	1	1%	0	0%	8	2%
Labor and wages	13	2%	2	1%	1	1%	2	2%	6	11%	2	1%
Safety	13	2%	4	2%	2	3%	3	3%	0	0%	4	1%
Other	95	12%	25	12%	3	4%	18	15%	8	14%	41	12%

Most Important Business Related Issue Facing Bellevue	
Business Services	112th being torn up
	A long period of consideration of draft.
	A nice clean location for business, but business and government coexist, but no real promotion from government. Police and fire presence is good and other city services and business gives a good tax basis, but where is the promoting of a greater business environment which will in turn enhance the city?
	Access to labor segments who want to live and work in Seattle
	accessibility
	Accommodating transportation and parking needs
	Affordable office and parking
	affordable rent
	All the construction and road closures. Cutting all the beautiful trees that is the reason people prefer to be here over Seattle. Please don't try to make it another Seattle. People can't stand going to Seattle because of the transportation/parking headaches. Don't go down the same path. Keep the trees and parking!!
	Attracting and maintaining good companies
	B&O Taxes
	Bellevue has unique prestige similar to Seattle
	Biggest complaint from staff is parking is too expensive.
	Bringing in more tech companies to build on the ecosystem / reputation we're establishing. Keep businesses here vs. having them move to Seattle.
	Close to airport
	Commerce building.
	Congestion and the price of retail/office space. It makes it extremely difficult for a small business to take part in the community and is wiping the city out of all charm. This is becoming a city of chains and franchises without an ounce of individuality. Nothing will be unique about Bellevue if it continues to box-out independent/small businesses.
Congestion of traffic.	

	Congestion, just the amount of construction going on downtown makes it very difficult to navigate. Basically the mall and Bellevue way is basically unusable at parts of the day.
	Congestion.
	Construction, traffic and parking. If your business isn't near the mall, parking is very difficult, especially with all the construction in Bellevue. And many of the new buildings don't appear to have adequate parking for the businesses on the street level.
	continual improvement to traffic congestion
	Continue to stay fully staffed and trained at City Hall to allow quality and timely services. Never forget that the businesses and individuals you serve are your customers.
	Controlling growth
	Convenient location, transportation options
	Cost of housing.
	Don't know
	DON'T KNOW
	Don't know. Our company only pays the taxes.
	don't know
	Downtown parking and traffic congestion due to new construction.
	Ease of communication with city departments
	ease of getting around
	Easy access.
	Education
	Environmental Stewardship
	Equality for all areas of Bellevue,
	For me it will be the removal of light industrial areas in the Bellevue area in favor of commercial and residential properties.
	Freeway Congestion
	Get Bellevue out of business' way
	Getting around, traffic. Transportation.

Getting into and around Bellevue is definitely a challenge. I have taken to meeting my clients not at my office as they hesitate to come into the city. I am not sure Seattle is much better but we are considering re-locating to a smaller city.

Growing ALL income levels, and comprehensive affordable public transportation.

Growth--Bellevue needs increased density zoning and mass transit to allow residents to live and travel, and conduct business comfortably in the city.

High commercial rent

high cost of business space

High cost of office/commercial space.

high cost of rent and traffic

High rate of break-ins and burglaries, which is most likely caused by drug addicts and other criminals coming to Bellevue from surrounding areas.

Housing

I guess traffic congestion.

I live here and work out of my home.

I think the city safety and good commit are more important for home business.

I think things are doing well.

I'd like an online account to submit my tax returns.

I'm a small business owner. Therefore, for me, the most important issue is the opportunities and resources available to small businesses.

I've been very impressed with the cooperation I've received from the folks at city hall. Sometimes it's frustrating, but most often I encounter folks willing and capable of going the extra mile at the permit desk.

INCREASINFG DENSITY, WORSENING TRAFFIC CONGESTION.

Increasing travel options for employees: light rail, buses, rapid transit

Infrastructure keeping up with population and economic growth.

Integrity

It's been very difficult getting adequate internet services in our area in Bellevue - and we are really in the heart of Bellevue on Bel-Red Rd. City needs to take more initiative to make sure all of Bellevue is getting adequate services.
It's very distressing to see the way that Bellevue fought light rail and caused years of delays. Incredibly backward thinking.
Keep cost of doing business reasonable.
Keep taxes as low as possible
Keeping business lease rent affordable
Keeping taxes low
Keeping the Business & Occupation tax reasonable.
Keeping traffic flowing
Kipping it a cleaner, safer, easier parking alternative to Seattle
Lack of incubation type support for new business.
Lack of parking.
light rail coming through the city
Like the entire Puget Sound area, traffic and congestion.
LISTENING TO THE PEOPLE! WHAT DOES THE MAJORITY WANT??? We certainly don't want the traffic challenges, nor spending millions on light rail before construction has even started. And where did the majority of people want it to go? Was their vote taken - and was it followed? And don't the majority of Americans want English as our national language? Why do we make so many accommodations to other languages? I love the diversity and also expect that newcomers learn English.
Location
Location cost
Longer term planning with the city as it relates to the city's high growth rate and increasing popularity as a go to city. Continue to blend this together so you do not end up playing catch up like Seattle is doing now.
Looking at the future for small businesses so they can succeed
Lowering taxes for business owners
Maintaining roads, controlling traffic
Making it easier for small businesses to get started.

Managing expansion well in terms of infrastructure, parking and balance.
Managing growth
Mass transit options to allow customers to access businesses without driving
Microsoft
Mobility...the difficulty getting to and from the CBD.
Money
more parking, transportation opportunities
More support for small and startup businesses
Need more incentives for Small Businesses
Need police dept. to regain trust and respect.
No comment
No comments.
No issues identified
no opinion
Non-vehicular access for commuters and shoppers, in particular the lack of safe off-road bike facilities and trains.
Not enough parking
Not following Seattle's lead with the ridiculous ordinances that are not friendly to businesses. We moved from Seattle to Bellevue because of this.
Not sure
nothing to comment
over development
Overall city needs versus neighborhoods.
Overly restrictive signage regulations and regulators make small business visibility very difficult. Bellevue is more worried about esthetics than fostering a supportive small business environment.
parking
PARKING
Parking and cost of doing business.
parking in the downtown corridor for smaller businesses

Parking issues. Downtown corridor has limited parking for customers. The parking that is available is expensive. Stop permitting high raises without adequate parking.
Parking near/around downtown/main street in Bellevue is a challenge
Positive image of Bellevue address
Potential over-development in the downtown core.
Probably nothing. Nothing comes to mind right now.
Probably screwed up taxing. The way they tax businesses.
Rapid economic growth in the city brought about by job opportunities
rapid increases in population - can basic city services handle the increase
Reasonable taxation.
regulations and codes
Rent expense for the individuals living near and the business. Lack of parking and cost.
Space for service businesses such as auto repair, florists, etc.
Strongly encourage more 'anchor' businesses to move to Bellevue via incentives and courtship
Support for small business and start-ups.
Supportive business climate.
sustainability of current economic climate
Taxes
Taxes are too high
Taxes, Roads, Infrastructure, transportation, local education
Taxes, they're high.
Taxes.
Terrible traffic congestion
The Department of Planning and Development is slow, inconsistent, and gouging.
traffic
Traffic
TRAFFIC

Traffic - reluctant of clients to drive into downtown Bellevue due to traffic.
Traffic & Parking
Traffic & services
Traffic 405
Traffic and congestion
traffic and lack of mass transit
Traffic and parking.
traffic congestion
Traffic congestion
Traffic congestion and parking scarcity related to overdevelopment
Traffic congestion.
Traffic congestion. This keeps employees & customers from getting to their destination. I have run into traffic and decided not to go to a Bellevue business. Sometimes it's faster to go to Pioneer Square from my business than it is to go to Bellevue Square.
Traffic congestion's impact on being able to conduct business in a timely manner and coordination (or lack thereof) of new development projects' impact on that traffic congestion - and ultimately the additional impact of increased density in the downtown core.
TRAFFIC CONGESTIONS
Traffic congestion on the side streets - construction on multiple streets in the same area, going the same direction thus not allowing for alternate routes.
traffic flow and obstacles
traffic flow, ease of travel
Traffic has become a deterrent for clients.
Traffic worse due to apparent uncontrolled growth and no effective transit.
traffic, mass transit
traffic, parking, cleaning filthy roadsides (bad impressions), zoning uncertainty
Traffic!!!!

Traffic.
Traffic. Lack of free parking.
Traffic. For instance, my accountant came in complaining that it took 25 minutes to get across 2 miles of town. And, that's too much. It's one of the biggest concerns I have, in terms of the rapid growth. Growth is great, we're glad people are coming to the area, but we can't have streets all blocked off, because it takes forever to get through town. We should have some sort of logical way to block off streets. There should be a thought of blocking off streets at night instead of during the day, because customers have a hard time getting here. It's one of the biggest concerns we have.
Traffic/ parking
traffic/parking
transit
transportation
Transportation
Transportation - congestion, insufficient transit service
transportation & traffic
Transportation e.g., traffic, transit, and walkability.
Transportation infrastructure.
Transportation, getting employees in and out for work. Getting Customers into and out of Bellevue.
Transportation.
Transportation. Obviously our roads are crowded and little has been done on the Eastside to provide viable (efficient, timely) public transportation for many of us. In addition, the construction in Bellevue has made traffic around the downtown area a nightmare and it seems every major street in Bellevue is getting new blacktop - almost at the same time. And with the Spring District, it will only get worse.
Transportation. They are doing some things, but they could do a lot more.
Turn-key business checklist would be helpful for a business that is starting up or winding down
Understanding the benefits of being a business owner in Bellevue, i.e. why should I be doing my business in Bellevue

	We need the light rail transportation from the airport and Seattle.
	Workforce, employees.
Information Technology	Affordable housing
	Better ground transportation, less traffic jam, high walk score, Fast quick development review/approval.
	better transit, walkability, diversity of business and people
	Can't say
	City of Bellevue taxes
	Cost
	Cost of doing business
	Ease of access as far as roads and all that. We are going in the right direction to make access easier, it's easier than in big cities.
	Educating business owners what the city of Bellevue is doing to help them succeed and why.
	Employees can't afford to live close to the office
	Enticing new large companies to the city of Bellevue. Anchor companies, you know. We provide services to other business, so when large anchor companies come to Bellevue that benefits us.
	For us it is the administration of the B&O tax process.
	High cost of rental space and staff. We are moving our business out of Bellevue soon because of this.
	high taxes
	I don't know.
	I would say infrastructure.
	instructor
	infrastructure
	Infrastructure, very old and out dated.
	Just growth. The diversity in the types of businesses.
	Keep taxes and regulations competitive.

Keeping the cost of doing business in Bellevue as low as possible.
Lack of enough incentives for startup's to encourage and generate vibrant job opportunities outside the big employers in the area.
lack of Hi speed internet infrastructure / mostly fiber optic
Less tax.
Limit illegal students in our schools. Keep school cost lower.
No comment
no hassle
No idea
None
Not Applicable
Parking
Parking. Not enough of it.
Preferential treatment of specific business categories.
Price of location, office prices and traffic. It's hard to rent a spent in Bellevue because it's high rent and traffic is getting worse.
Probably traffic. Downtown Bellevue traffic has gotten really horrible. I really avoid going into downtown Bellevue because of the traffic. It is so condense there. You have to plan out your day there. I used to go to Bell Square a lot because it was an enjoyable place to go and now it is not.
Probably, They don't have any that would affect me.
Promoting Business
Providing and enhancing the various infrastructure (transportation, communications, work force, services) elements that help new and existing businesses grow.
Realist ate
Really don't know...
reduce tax
road congestion and easy access
safe
Some of the street intersections are very pedestrian unfriendly.

	Tax Filing should be computerized. The staff are not helpful, compare with Redmond, Kirkland.
	Tax rates. Bellevue's done a pretty good job at keeping tax rates relatively low compared to Seattle.
	taxation
	Taxes
	The cost of rent, Too high.
	The taxation.
	the taxes are really high
	Too many businesses, too much construction, too much noise.
	traffic
	Traffic
	Traffic between Bellevue and Redmond. Unpleasant B&O taxes and L&I
	Traffic congestion
	Traffic congestion and need to improve infrastructure
	Traffic, too much traffic.
	transportation
	Transportation meaning excessive traffic.
	We are required to file quarterly taxes with the city of Bellevue. When we were located in the city of Kirkland, the tax reporting was much easier and less expensive. We are not located in the downtown area of Bellevue which is where I'm sure most of the services are centralized, so we don't see a lot of benefit.
Retail	Businesses in Bellevue is only as strong as its weakest component. Privately owned business landowners suffer unless they sell to larger companies. Parking is also a problem for business and residence Not only does Bellevue eliminate street parking at every stage of development Additionally the ability to stop and let someone in and out of a vehicle or bus now requires blocking traffic In many areas.
	accessibility

Accessibility & Parking. As a local merchant with locations in both Seattle and Bellevue the issues of traffic congestion, construction projects and the ability for consumers to get to my business has been impacted negatively at our Bellevue location. I see this problem worsening over time. Many consumers, unless they live locally are starting to avoid the area due to the immense traffic we are experiencing.
affordable space for small business
Auto transportation is dreadful especially at commuting times and with the increasing number of high rises and until we get light rail help it will only get worse. I don't go into town unless I absolutely have to.
Biggest issues with small businesses are: Traffic Taxes Parking
Building and increased traffic is creating a very undesirable environment for meeting or out of town visitors
Business friendly and visionary leadership
Business growth, transportation and parking.
Communication.
Communication.
Cost and taxes, Just cost a lot more with leases
cost of land
Cost of living is too high.
Cost of rent
Cozy 9f operating in Bellevue is driving small businesses out of business.
Cultivating a nightlife!
DONT KNOW
Ease of services, getting the services I need.
Expensive Rent
Flow of traffic to the mall. Our business is somewhat dependent on mall traffic and ease of access.

For us the main issues are Not business friendly environment, because it has a higher tax compared to other locales. Another discouraging issues is the long term construction of the train. The next issue is the police towed numerous of our vehicles because they didn't have license plates, from our point of view it's a big nuisance to us. It cost us additional expense.

From a macro stand point the biggest negative is Traffic. From a micro standpoint it is the fact that Bellevue based business get virtually no preferential treatment when competing for business. We pay taxes and support the community and when there is Business to be won we are treated the same as companies that are located in Renton

Having businesses grow without burdensome regulations.

Having great schools and have a secure community. Business taxes are extremely high. The fact that I have to pay such high taxes, it would help if the state of Washington could help out with that would be extremely helpful.

I don't have any clue.

I think that overall the safety of the area affects my business. I work in retail so the police and demographics all effects my business. The property values are going up and effects my business.

I will just speak for my business strip mall are we are in. I am not happy with the way land lord take care of the space. Parking lot is barely getting cleaned, all my customers are really surprised of our dirty strip mall area. It is getting really embarrassing considering we are in Bellevue. I have had unhappy customers mention it on yelp. It really hearts business. We are Bridal salon and we have two huge garbage boxes in front of our store. It is really unattractive to the brides when they come shopping for the most beautiful Gown they have to wear for their big day.

I would say it would be ease of doing business. The process of setting up the business. The support that the city provides.

Increase in traffic and will need to move to one way over time I would think.

Lack of communication. I think 405 is a mess. They reduced the lanes and there are lanes you have to pay for and it takes longer to get to clinics and it's a mess.

Lease rates

Leasing is high in Bellevue.
limit the amount of reporting necessary
long permit approval time
Maintaining functionality of the streets and eliminating as many traffic issues as possible so people don't become frustrated trying to get to businesses.
Managing growth and congestion
Managing the Sound Transit construction project of the light link rail system as well as the upcoming spring district.
Mass transit
Maybe creating a better water front so Bellevue doesn't look like a big shopping center.
Minimum wage.
Mobility! Our roads and freeways are too crowded for too many hours of the day.
NONE
Over development and lack of planning. Chic a filet is prime example. Poor location for the amount of business they do. The lack of planning for parking and the placement of the entrance have created traffic issues in all directions. The business should not have been allowed to build there. Also, traffic flow North/South is nonexistent with the majority of flow patterns favoring the East/West routes. Flashing arrows in both flow patterns never allow for use due to poor timing of lights from other roads and green turn signals are too short, East/West lights are too long. Also, with over development, parking is an issue and no, smaller parking spaces to meet the codes is not the answer. Many spaces cannot be used when a garage is full because even a small size car will not fit in the space.
Over development with incredibly poor planning around the basic infrastructure, that has contributed to lack of easy access to basic business' (grocery, gas, pharmacy etc.), lack of parking (or what parking that is available is so ridiculously undersize, it's unusable by the average vehicle) and horrible traffic.
parking
Parking
Parking and the inconvenience of all the construction. No one wants to come over to shop when it is so difficult.

Parking at our store is good, but people use our parking that walk off somewhere else. I think more thought should be put in cutting down or trimming trees so as to expose the only sign we have...it is literally blocked out by the trees when you drive by. If we are to pay high rent for such a great location, we really need a way to say who we are from the street...it's the single most important part of our cash flow.

Parking for customers and the ability to arrive at destination safely. Streets are incredibly dangerous due to construction sites, and workers crossing in the middle of streets. We have so many police officers directing traffic, that there are no police to watch speeders and people running red lights. My customers are afraid of driving in Bellevue and at times, so am I.

Parking. Bellevue does not require enough parking in new development. Look at Main Street and the Downtown Park. Park goers use the business parking, what's going to happen to the businesses if their customers can't find parking close to their store, the customer will go where the parking is easy. About the Downtown Park, how can you increase the size, make it a regional park, and not increase parking? The City has really screwed this up. And parking in the new waterfront park is a joke.

Permits for construction, rules for refuse/trash, mandatory weekly pick ups

Poor transportation. How can businesses thrive without the traffic being able to move? I have lived in Europe; the only real answer I can imagine is good light rail public transport. Germany is thriving with this – loads of folks over there don't even OWN a car!

Probably taxes. Obviously we want them to be as low as possible.

Promoting local business

Providing ample parking and accessibility to businesses and homes

real estate taxes too high

Regulations

safety and security

Sales Tax

Shows

Sound Transit. How are the business going to do business with all the construction?
Sound Transit. They are forcing us to move.
Start up support and open office space for local business to use would be nice
Storm water flow. When they don't maintain the storm water flow and then they don't maintain the storm water exit from the city, they don't accept responsibility. It speaks volumes in deceit, cover-up.
Taxation.
taxes
Taxes
Taxes & cost of real estate.
Taxes and Roadworks hamper reaching location.
Taxes are high for small business owners
Taxes, they are higher than other areas.
Taxes, Transportation, Free Parking, Affordable Housing for People Working in Bellevue, Road Construction Projects that clog traffic.
Taxing businesses. The tax rate and businesses.
The lack of an Internet sales tax.
The light rail
The problem I see is the downtown corridor id forcing smaller businesses out, and they're focusing only on the large Microsoft and google of the world to the detriment of small businesses.
The rent is going up too fast.
The sales tax and local tax seem little higher.
The traffic system.
tight parking
Too much roadwork and street closure for frivolous pretexts
To promote a good environment for commerce.
Too many laws
Too much control.
traffic

Traffic
traffic & public transportation
traffic and congestion
Traffic and road construction.
Traffic issues
traffic, cost of living in Bellevue, workers are not able to live in Bellevue, must outside the city
Traffic, it's very heavy, jammed and difficult to get around.
Traffic, Roads
Traffic.
Traffic. It is bad. We have very heavy traffic and it is hard to move around in with all the new construction going on. I think we should have free internet access, high speed internet.
Traffic. It's horrible. Just too many cars not enough streets. Lack of effective public transportation.
Traffic. It's too congested. They need a rapid transit system. They have it coming but you know it is taking too long.
Traffic. You just can't get places because there so much construction going on that you can't get anywhere fast.
transportation
Transportation and access to public transportation so that workers can actually afford to get to work.
utilities - water sewer soooooo expensive
wages / employee costs
Well, I think it's to make the downtown area more pedestrian friendly. It's a little scary to be walking around downtown. They do not enforce the speed limit.
Where my business is, it is parking and traffic. There are no speed bumps to slow people down. I am surprised that more people haven't been hit because of the speed that people are going on Main Street.

	You only cater to big business. You want to be Seattle and that is not good. Small business will be leaving due to transportation issues and lack of representation for small businesses. We are being forced out by high rents and parking issues. Just because Bellevue has a bunch of millionaires does not mean we all are. Our employees come to Bellevue from other places, but it's not easy or affordable. You should be demanding that the 405 toll lanes be changed back to just HOV lanes so businesses can continue to operate in Bellevue.
	Zoning
	Zoning
Tourism	As a restaurant operator, our biggest concern is that high wage rates make running a profitable restaurant business problematic. We'd hate to see Bellevue follow Seattle's lead when it comes to minimum wage.
	City Planning
	Communication for fire code.
	Communication, within departments, also streamline within customer services. To make it easier for us to communicate.
	Construction
	Cost
	cost of living
	Dealing with the city, the cost. It is expensive.
	Diversity
	Don't know enough to answer
	Ease of tax filing for small business
	extremely expensive to operate, not easy for small businesses
	Facilitate online quarterly Bono tax filling
	Finding the right labor, employees. Because it is hard to hire the right people.
	Government support
	Hard for small businesses. Bellevue favors large companies and isn't terribly helpful to small businesses.
	High taxes
	I don't have a problem and I think is really good.

I feel that I pay too much taxes, from what I get out of the services that I get.
I may have yet to hear about your services before I make comments. So far, the only thing I know is I pay taxes. I have to say, the city is clean and I applaud you for that.
improving the image as a place to visit on a social level
Licensing is slow.
LITERALLY ANNUAL MINIMAL WAGE INCREASE IS KILLING SMALL BUSINESSES
local talent pool
Making the infrastructure better for businesses not in a mall. We need more neighborhoods that are destinations and provide parking for potential customers and residents.
Mass transit.
Minimum Wage increases
Need for better mass transit and better parking
parking
people
plenty of support for large interests none for small
Rent is too expensive
rising labor costs and increasing regulatory pressures
Slow reactions to plans
So far so Good, no issue with Bellevue
Solid growth.
Stop issuing so many building permits. We are closing our business as there have been two sets of flaggers outside of our business and have effectively shut us down. Would love to know if the city is helping businesses like mine that are so negatively impacted by all this new construction. We have 4 buildings going up within a block of our front door.
Taxes
Taxes. Business taxes. Cause that's money going out.
The client, the customer.

	Top heavy with developers in the council so their goals with the city are different than that of the people of Bellevue. The best thing the council can do is cater to smaller business instead of pushing us out. The council thinks of smaller business as a franchise.
	traffic
	Traffic
	TRAFFIC
	Traffic & parking
	Traffic and unfriendly to pedestrians especially during road repair and construction. Especially unfriendly to individuals with mobility issues. Lights need to be timed so traffic can flow. The traffic problems caused by street resurfacing along 116th Ave NE this summer was ridiculous - it caused huge delays in the patrons of my business being able to reach my offices. And now the narrowing of 116th Ave NE by one lane in each direction north of NE12th is causing ongoing traffic delays and driver confusion. Cars are using the two way turn lane to travel for extended distances which makes that turn lane unusable and stalls traffic traveling northbound on 116th Ave NE because turning cars cannot safely access the office parks on the west side of that street.
	Traffic control
	Traffic or roads or transportation issues. Having customers being able to get to you easily.
	Traffic patterns. Just that Bellevue has really good streets and roads and good access.
	Traffic. There's a lot of construction that makes it difficult for people.
	Transportation, access to transportation
	Transportation, we need public transportation.
	unnecessarily Strict
Other	City of Bellevue cares about downtown growth.
	ability for businesses to operate effectively under known rules
	Access to services

Access to utilities such as high-speed Internet in areas that are being rezoned due to light rail.

Access. Constant street damage repair caused by trees that were planted by the city and not properly maintained. When repaired they do the same thing they know is going to happen again. Can't be too bright. After all, the same city planners plant hundreds of trees under street lights and in front of street signs. (This city is sign crazy also) construction clogs traffic everywhere. Design is ex. 140 ave ne between ne 8 to main. Huge medians, trees that can no way but damage surrounding sidewalks new wall and streets in a short period of time. How will you possibly repair that without pissing everybody off again when we all know it is just stupid design that we all get to pay for again. And again and again. It's everywhere you look. Trees and bushes at a cross walks, who designs this? We expect the city to use some common sense in design. But instead has created a horrible design that requires extremely high maintenance city that is not being maintained. Designed correctly we could have a bigger police department, bigger fire department, school budget and a killer surplus. Don't see that happening any time soon. Ex. road repair ne 12 between 104 and 112. Just finished huge median by library, we called them wheel draggers, it runs right into the double yellow? Why would they squeeze the street? From the look of the temp lines they aren't considering a bike lane or do we just shove it against the curb? I better stop, I could talk an hour. Sorry about the vent but it's not just me. I work with the public and talk to people every day and we all have the same gripe. "Who's running this show"

Accessibility

Accessibility to businesses on existing streets

Accessible free parking.

Affordable housing for employees

Affordable Office/be space for small businesses, bike/pad transit

Again great location

approval of new business permits take too long whether its construction and more hoops to jump through

As a small business owner I am being swallowed up by taxes and regulations. There is no advocate for the small business owners and we don't have the time or resources to fight City Hall or Olympia. When you are working 15 to 16 hour days it is difficult to keep up with paperwork and legal mumbo jumbo. So basically the system is set up for government to win and large businesses to win. Not fair! I pay state B and O tax, Bellevue B and O taxes AND B and O taxes in each city we work in. And these taxes are off the Gross profit! Crazy!

As a sole proprietor I didn't use business services. I do find that living in Bellevue is a wonderful experience for me & my clients.

Available, affordable space

B&O tax

B&O taxes

Bellevue city should take an important role in helping local businesses serve the local government needs. Bellevue city should focus on providing occasions for businesses to interact with one another, aka Chamber of commerce functionality, though at substantially less premium

Bellevue is more expensive than other cities

Building permit barriers.

Business communication.

business restate availability

can't say

Certainly lack of adequate parking and traffic due to overbuilding

Change of our address to Spring District really affected our way of doing business as truck drivers cannot find us.

City officials make it incredibly difficult for a small business to prosper in Bellevue. Every time a small business owner complies with city officials he gets a new list of other issues to gain compliance with. We have spent two years on compliance issues that do not even make sense to city officials.

Commute

Commuting to and around Bellevue is the biggest challenge to getting and maintaining employees.

Competitiveness

Congestion is our biggest concern. We don't sell in Bellevue or Washington, so a growing local market is not a factor for us. Quality of life, ease of transport, work close to home, etc. are the factors that make living and working here important to us and our employees.
Connecting the dots of building scalable business eco system.
consumer friendly
continued permitting and investment in infrastructure - transportation (transit & roads) and utilities
Continuing to attract quality, growing businesses (technology)
Cost of doing business including regulations and taxes.
Cost of rent
cost of space is extraordinarily high
Cost; Traffic; Congestion
costs
Creating an interesting, diverse, and vital mixture of upscale professional, medical, and retail space and making it not be cost-prohibitive for new businesses to get started.
crime by homeless (destroying business property)
Currently is the zoning concerns for our industry.
Customers
Damage to the roads for the train system. Too much construction and not enough parking. Parking that should be available is made too restrictive.
Development and parking
Don't know
Don't know.
Downtown master plan. It will be critical for Bellevue to manage the increased urban density while maintaining efficient and reasonably convenient traffic flow and a productive interface with transit.
Due to zoning regulation I cannot place a normal size sign, so my business is not visible and there is nothing I can do about it. Also police response is very slow
education for small and large business in Bellevue that describes opportunities as well as tips in running a business

Everything is overpriced.
Excessive government regulation and politically correct solutions versus solutions that work well. Also, interagency squabbling.
Excessive Traffic
fellow business and regulation
financial feasibility
FOR MY BUSINESS IS TRAFFIC
For my business, traffic congestion affecting accessibility.
Foreign money and business practices coming into Bellevue and redefining the business culture in a way that feels destructive to what has made Bellevue successful. I am concerned about the future of Bellevue.
forward thinking to maintain a strong economy
Free parking availability for business owners - as downtown continues to grow.
Freedom from current and obvious additional future taxes which choke all small businesses
Freeway traffic congestion
Funding
Getting people from point "A" to point "B" is the big issue.
Good access/central location, business services, qualified customer base in greater Bellevue area.
growing with the economic times - bringing people in for shopping, dining
Growth and infrastructure of the city so business are accessible.
Growth in Bellevue is great, however it brings traffic, congestion, and a homeless population which I don't think have been addressed adequately. My business is located in Factoria, and it feels like it is becoming more of the ghetto of Bellevue. I'm seriously looking at relocating for this reason. I have loved being in Bellevue for the last 30+ years, but I don't like the direction I see this area moving toward.
growth traffic congestion
Growth, the need for it.
Hard to deal with the growth. Hard to deal with all the people coming here.

Have a house painting business and I am on the road a lot. Areas where traffic is slow during the day affect my ability to get to either paint stores or job locations, such as 148th and 140th during the afternoon commute. It's very slow. Not sure what would work better.
Heavy traffic due to construction, impending massive influx of people resulting from large amounts of multi-unit housing being put in downtown.
High B&O tax
high cost of doing business
high rent
High rents for commercial buildings
High taxes
high tech , real estate
Higher the taxes, higher the costs, customers look elsewhere. Local business cannot compete.
housing
How complicated it is dealing with city regulations.
how to find efficient information
I am really not sure!
I cannot put a board as it is a home based business
I don't have any issues that I could attribute to the city of Bellevue
I Don't know
I don't know. I'm not there very often so usually the most frustrating part when I am there is traffic.
I don't really know....my business is very small
I don't know
I have no business issues with Bellevue
I haven't dealt with city of Bellevue except to pay taxes, but please make sure there is a live person available to handle phone calls and problems when they occur for businesses or individuals. There's nothing worse than getting no response or the runaround when a person or business has a problem or needs help with an issue.

I own a small consulting business. I have no idea what services the city provides to businesses like mine. I.e. Where do my tax dollars go?
I'd like to be able to use sandwich boards to advertise my business. Otherwise, as it is in a complex (as so many businesses in the area are), it is exceedingly difficult to get the word out.
I'm not sure.
If you don't own the source of electricity and pay by-the-watt for heat of any type, that's profit out-of-pocket never to return. If you own generation-storage-distribution it's an asset-liability on the books & paying the "bill" gains equity, NOT AN EXPENSE. I don't want to pay energy companies to offshore their profits for what could be an asset.
Improving business climate and focusing on core responsibilities such as roads and infrastructure improvements while keeping 'wish/pet list' projects to a minimum.
Increase foot traffic
Increase the FAR so my property can be valued correctly
Information is available on city website for business concerns.
Infrastructure and access
It is expensive to be a Bellevue business owner
Keep on raising taxes and fees. Make sure you invite the EPA as much as you can and pretty soon you'll have no contractors in the city of Bellevue. But again what do you care. Keep on voting for bigger budgets That's what matters after all.
Keeping business here and affordable with leases
Keeping fees and license reasonable, with exemptions for small business
Keeping taxes at an affordable rate
Keeping up with competition in your own field
Lack of immediacy
Lack of industrial space
Lack of minority women business development
lack of responsiveness from city employees and undo (extra B&O) taxation
Light rail tearing up businesses

Make it friendly to small businesses
Making rental properties affordable for small businesses.
Manage traffic better.
Management of growth relative to infra structure required to handle the growth.
Managing growth
Managing growth and traffic.
Means of accessing other parts of the metro area. Ease of people getting to me.
Minimal benefit from taxes paid.
Minimize business operating overhead.
Minimizing bureaucratic hurdles and expenses for small businesses. We're already strapped to the limit. Anything the city can do to FACILITATE and streamline processes is highly appreciated.
Money.
More modern urban construction
More support for individuals with low incomes; Bellevue has a stereotypical image of a wealthy city, however numbers are often skewed due to extremes. Low income individuals remain unserved and unsupported
n/a
Need more local business opportunities
Need more co-working space for startups.
Networking
no comment
No idea. I haven't talked to other business owners.
No opinion
no parking space
None
Not applicable. We don't engage in business within Bellevue, it's just an office location out of convenience.
Not being able to park my vehicle for 24 hours, and basically being over-taxed. Even though I am creating jobs for people, I am being punished.

Not certain
not sure
Not sure
Not sure of any single most important issue.
Not sure.
not too much regulation and good services
Nothing special.
Number of successful businesses that drive a quality pool of talented and medium to high compensated employees to the area. This is vital to our economy.
Office space for small businesses. In my office park (Bellfield Office Park), we small businesses are not getting to renew our leases because bigger companies are expanding to take over entire buildings. I office with five other therapists and we had been in the same building since 1991 until two years ago, when we had to move to a different building because of a company taking over the building. Now we have learned that we will not be able to renew out lease here for the same reason. It is getting quite difficult to find space to do our work, and moving clients is always stressful (and expensive for us). It is getting harder to find small spaces now.
Parking
Parking and cost of rent
Parking and increased traffic congestion. Clients find it hard to make appointments on time= loss of revenue =loss of excise tax money
Parking and traffic
Parking for access to Old Bellevue businesses during construction.
Parking on Main Street and cost of retail space being too high
PARKING, all areas around Main set have zero to no parking available for customers
Parking.
People hate the traffic and are often late to appointments and stressed out.

permits/ licenses to be able to operate within the city for a single job for example some neighborhoods have restrictions for pressure washing, etc.
Planning and traffic
Politics.
population
Price of everything is relatively expensive.
prices
protection for small businesses
Public transportation from outlying areas.
Reasonable rent and parking and flow of traffic
regulation
regulations
remove the multitude of fees, it makes it financially difficult to start a business when there are many fees that I have to incur before I can begin my business
rent
Renting office space is super expensive, very poor connection to the Internet overall. Many office complexes have extremely antiquated services. No wonder America is #27 worldwide in terms of Internet speed. A high percentage of offices in Bellevue have less than 3Mb/s Internet speed as the best option all providers can offer. This is absurd.
Responsiveness to issues or concerns.
Rezoning
roads
Roads
roads and infrastructure meaning direct access business to business being in the city limits, it's easy as a consumer to go to one direct spot i.e. the mall but negotiating the infrastructure all day is tough
roads/construction
Safe
safety
Services to support the growth

Services to support young companies
Simplify tax system
Small business being pushed out of the downtown core due to high priced development.
Small town mentality with majority of commercial real estate rental properties and management in the power of a few hands. Bellevue needs to grow and expand beyond itself and bring in more fair market competitors (e.g. regionally, nationally and even internationally) to the table to open more opportunities for real talent at every level of hire.
Sound transit should be eliminated as an option. It is too costly. More buses. Remove the double HOV lanes
space
Space leasing is too expensive
specific to our location - signage restrictions
stable companies
Streamlining the permitting and licensure process from TI to filing taxes.
Support of small businesses
Supporting small and start-up businesses
Supportive
Tax
Tax rate
Taxation
taxes
Taxes
Taxes -- too complicated and high compared to other eastside communities.
taxes & compliance work
Taxes are high
Taxes are high for small businesses.
Taxes.
Technology
That small business owners be able to stay in business

The ability to get where you need to go when you need to get there. Traffic
the affordability of labor is going to be an issue
The city seems to be eliminating space for light industrial work to occur.
The cost of rent.
The cost per square foot to have a business here
The environment, which make us hire people with good talents easier
The extra tax that city of Bellevue gets from businesses doesn't make having a business in Bellevue any more beneficial than let's say city of Redmond
The fire department is not consistent with the inspections.
The impact of redeveloping the Bel-Red corridor on small businesses in that area. There aren't many places to go.
The road congestion.
There are not really any significant issues in this area.
There are so many.
There is no issue to do business in the city of Bellevue so far. I'm really satisfy in my business with the city.
There is so much development in the city now that I worry that the increase in people will overwhelm the roads. Traffic will become a major issue and parking.
traffic
Traffic
traffic / transportation
Traffic and ability to get to where you are going in a timely manner.
traffic and accessibility
Traffic and congestion.
Traffic and construction.
traffic and economic development
traffic and parking
Traffic and parking
Traffic and potential traffic with all the new housing being built

Traffic condition
Traffic congestion
Traffic congestion and "Smart Green" growth rather than money centered growth. Obviously you are installing additional housing in this area and this will effect bus routes, and traffic congestion which will need to be addressed quickly. Hopefully the housing is built in a manner applicable to the new constituents moving in, meaning affordable, multi-use, convenient, space efficient etc.
Traffic congestion and too much road construction
Traffic congestion, enforcement and pedestrian safety, especially in downtown Bellevue.
Traffic congestion, limited parking, rising cost of parking.
Traffic control and parking, making it easy for residents and customers to visit Bellevue Businesses
traffic delays
Traffic flow
Traffic flow through core areas
Traffic in the city and to the city, now both 520 & i405 toll fees, it burdens clients even more and affects business flows as a result
Traffic interfering with customers' ability to get to my business easily, primarily I-405
Traffic on 405 (WSDOT) and their tolling has made this much worse.
Traffic problems. They are working on addressing that.
traffic related accessibility
Traffic, congestion.
Traffic, no parking, need more roads and less train projects.
traffic, parking
Traffic.
Traffic. I find it hard to believe that they allow so many streets to be blocked off at one time. The traffic has been ridiculous and it affects business.
Traffic. We have been blocked by traffic jams several days in a row due to road construction. We have also had difficult access due to the opening of Chick fil a. We are near the Spring District and we are fearful that we are going to be battle construction related traffic issues for several years. Bummer.

Traffic. As housing density increases, I think the traffic will continue to worsen. I don't just mean 405 and the bridges--around town, too! Where will all the additional cars go?
Traffic. Getting in and out of Bellevue is horrible and the toll lanes have made it even worse.
Traffic. I think it needs traffic management. Obviously some days it is better than others.
Traffic/parking
Traffics
Traffic
Transit
transportation
Transportation
Transportation and parking.
transportation challenges by private transit
Transportation infrastructure.
Transportation.
Transportation. Real estate appraisers need to be as efficient as possible to make maximize their commissions; the slower the speed between properties, the slower they can finish the appraisal, and the lower their annual pay.
Transportation. The buses are limited throughout the city and surrounding areas, and the highway congestion throughout Bellevue is getting worse.
Unsure
Updating outdated codes
very few office space options for emerging businesses (thankful for Impact Hub and other emerging co-working spaces)
We are a wholesale distribution company & operate out of a small office. We haven't had any issues/problems with city services, etc. in our many years here.
We have had significant vandalism and the police failed to investigate or even follow up with us
We must expand our city streets to support more personal vehicles, build out the charging infrastructure everywhere for electric vehicles, and dramatically improve the ways in which our citizens can travel to and from transit pickups/stations via flexible on demand shared riding solutions. We do not need more parking lots. We need more options to enable getting to/from the transit stops and stations. And, above all else, we must recognize that personal vehicles, electric, and soon self-driving will solve our greenhouse gas problems, and maintain high personal productivity. Waiting for buses and trains is a total waste of time and drastically damages productivity.

	Wealthy customers
	Well, currently I am trying to find a new employee, but at their pay scale, they can't afford to live in Bellevue, so they commute in from more affordable areas, such as Renton & Kent, but the commute eventually becomes a factor & I can't retain them. I have heard others in my industry have the same issue.
	What affects my business the most is the traffic.
	With major growth I'm concerned about less available parking.
	zoning for future growth

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

Reasons Bellevue is Headed in the <u>Right</u> Direction												
	Overall (618)		Business Services (n=167)		Information Technology (n=58)		Retail (n=80)		Tourism (n=43)		Other (n=270)	
Growth/development	143	25%	43	27%	8	16%	19	24%	8	20%	65	26%
Business Friendly/Economy	71	12%	19	12%	5	10%	6	8%	2	5%	39	15%
Future/forward thinking/Proactive Leadership/Progressive	57	10%	13	8%	8	16%	6	8%	8	20%	22	9%
Well managed/Well Planned	33	6%	8	5%	4	8%	4	5%	1	2%	16	6%
Clean/Environment/Quality of Life	30	5%	11	7%	4	8%	2	3%	2	5%	11	4%
Easy/Access to Services/Amenities	23	4%	3	2%	6	12%	3	4%	1	2%	10	4%
Infrastructure	21	4%	7	4%	1	2%	4	5%	2	5%	7	3%
Helpful/Supportive/Responsive/Friendly/Positive	19	3%	4	3%	4	8%	3	4%	2	5%	6	2%
Public Transit/Transportation	17	3%	4	3%	2	4%	4	5%	0	0%	7	3%
Variety/Diversity	17	3%	5	3%	1	2%	2	3%	2	5%	7	3%
Safe	13	2%	3	2%	1	2%	3	4%	2	5%	4	2%
Location/Convenient	11	2%	4	3%	1	2%	2	3%	1	2%	3	1%
Taxes	9	2%	1	1%	3	6%	2	3%	0	0%	3	1%
Traffic	8	1%	4	3%	1	2%	0	0%	0	0%	3	1%
Unmanaged growth or development/overcrowding	8	1%	2	1%	0	0%	2	3%	1	2%	3	1%
Light Rail	8	1%	4	3%	1	2%	0	0%	1	2%	2	1%
Density	8	1%	3	2%	0	0%	1	1%	0	0%	4	2%
Tech Industry	8	1%	2	1%	3	6%	1	1%	0	0%	2	1%
Cost/Expensive	6	1%	0	0%	1	2%	2	3%	0	0%	3	1%
Regulations/Red Tape/ Beaucrocity	4	1%	1	1%	0	0%	0	0%	2	5%	1	0%
Unfriendly to small/local business	1	0%	0	0%	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%
Not helpful	1	0%	0	0%	0	0%	1	1%	0	0%	0	0%
Traditional /Old	1	0%	0	0%	0	0%	0	0%	0	0%	1	0%
Other	100	17%	26	16%	4	8%	12	15%	8	20%	50	20%

Headed in the Right Direction

Business Services

A lot of growth, but just some areas only

Addressing transportation

affordable housing

Attracting Businesses

Balanced growth, business and residential

blah

Booming

building densely

business friendly

Business Growth

business inclusive in decision making

business orientation

Business-friendly staff

change

city planning

Clean

Clean City

Clean prosperous

Climate and transportation

Commercial development

Communication

Construction activity

Continued growth

Controlled growth

convenient

Convenient

Desired Improvement

development

Development

Diverse and educated population
Diverse, Quality Minded
diversity in growth
downtown development
Downtown expansion
Ease of Operating
Economic
Economic Growth/Job Opportunities
Encouraging growth
energy and diversity
Expanding businesses
Expanding downtown
expanding roadways
expansion
Fair to owners
Fiscally responsible
forward thinking
Friendly People.
future growth
future planning
Good city planning
Good environment
good infrastructure
Good infrastructure
Good leadership
Good Long Term Planning
great city
Great environment protection
Great Location
Grid locked.
group

growing
Growing
growing community
growth
Growth
Growth and change in the sounding business
Growth in Business community
growth managed
Growth Potential
growth transit
Growth, progressive
growth, great environment
I don't know
improving city
infrastructure
integration between businesses and residents
investment in projects
It is providing more high rise permits which will bring in more professionals
It's friendly to small business
job opportunities
Kemper Freeman
light rail
Light rail and high density housing
Light Rail plan approval
location
Lots of building; road upgrades
Low taxes
Money
more businesses
More diverse
More listening

more online automation
N/A
New, growing infrastructure
nice environment
Nice Service
No comments
no opinion
No problems
not sure
Operations within Bellevue
partnership
Perception
Planning
Planning for future
Pleasant place to work!
population increase
pragmatic
Predictability
pro development
Pro-active
proactive planning
process time
professional
progressive
Promoting business
prosperity stimulates biz
Quality Growth
Quality life
quality of life
Quality Services
reducing traffic

Regulated growth
Responsive
roads/traffic
safe
Safe
safe environment
sound development plan
strong city council
Strong economic activity
Strong leadership
surveys
talent concentration
TAXES
Tech companies
Tech growth
The growth
too much red tape
Traffic
traffic concerns
TRAFFIC, OVERBUILDING
train helps
transportation management
transportation, technology
Trees
Unknown
Upgrading Facilities
upkeep
Use of public transit
very good staff
walkability
well managed

	Well managed, and long term strategic planning
	well organized
Information Technology	access to services
	bad question
	City Planning
	clean, growing
	Comparatively
	don't know
	Don't utilize many Bellevue services
	dynamism, high education
	easy simple
	easy to get needed information
	Easy UI
	encouraging development, improving transportation
	everything going smoothly
	Expanding
	GKBBX
	Good leadership and professional management of the city.
	good planning
	Good planning and growth
	great place
	Great support
	growth
	Growth
	growth oriented
	I don't have to call them for anything.
	In center place of commute
	infrastructure
	it's beautiful
Just more businesses and shopping available.	

light rail
long range planning
long term planning
low B & O taxes
more companies
moving forward
n/a
no potholes
Not a hassle work with, nice place to live.
planning and transportation
Pro-Growth
Pro-business, pro-technology.
proactive
Proactive
Progress
Quality of life
resources to do business
safe city, new spring district development, improve traffic
Sharp
Small Business friendly
Startup events
Still developing, and growing, and building a good place for people to operate businesses.
Strong tax base
Taxation has not changed
Technology area and infrastructure in terms of the resources and environment it provides for the startups.
technology capable
The city is clean. Focuses on improving transportation.
too many illegal students, cost up for tax payer
what the city is doing

Retail	added cost to do business, the alarm fee
	atmosphere
	average
	Average
	Because I have a home here and the safety issue too. The safety issue is excellent.
	business friendly
	Business friendly
	Cannabis freedom
	Cause as my part I think that Bellevue is getting more and more improvements.
	city services
	conservative
	continuously investing in infrastructure
	Development
	diversity
	don't know
	Dynamic and growing
	Ease of operation.
	Efficiency
	Error!!! I don't think it is
	fast response and convenience
	Financial Growth
	Forefront
	free parking
	Friendly
	going well
	Good Infrastructure.
	good leadership
	good place
	good planning
	Great job opportunities
	growing

growing communities
growth
Growth
growth jobs opportunities
growth opportunities, development of water front
growth planning
High rise development
HUNCH
I don't know. I can't answer that question.
I have seen a lot of growth and appropriate growth management.
I went for a 6 because it is neutral
I would say the development of the downtown business area is good.
immigration
Infrastructure
infrastructure development
It is building.
It is easy to get a business license in Bellevue.
It is growing. There is a younger population
It keeps growing.
location and population
long term thinking
Major Growth
mass transit
negative experience
new constructions
No fees
no issues
not acquainted with services
nothing specific
Over development
Overgrowth

	parking/transportation
	People live in Bellevue, they are happier and high educated.
	Positive Encounters
	positive perception
	Progress
	progressive
	Public Transit
	Quality growth
	Real Estate options
	recognize the needs of businesses
	Right Leadership
	Roads
	safe and clean
	security
	Strong community with a lot of large stable businesses.
	taxes
	Taxes
	Tech economy
	Things work
	Understanding of city hall in relation to businesses.
	well managed
Tourism	Business friendly
	celebrates diversity
	City is good
	clean safe
	Consistency.
	Critical mass
	development
	Development
	driven young passionate

Economically stronger
expending
Focusing on growth and modernizing the city.
good infrastructure
Good variety of businesses.
Growth
Growth of white collar jobs
Helpful
I don't have an answer to that.
I don't know, they are doing so well. I don't know what I can describe.
I think the city is more organized.
Improvements in transportation infrastructure and the spring district.
Improvements.
just guessing
Light Rail
location
More people live in Bellevue.
n/a
Need to allow quarterly report online
Over managed
over regulation
Planning
population
Proactive communication
Progress
Progress of new buildings.
right
safety
So much construction
Somewhat Environmentally progressive
stewardship

	Surveys, Research
	Their public needs are looked after.
	They tolling to the freeway and I don't like that.
	They're putting thought into the future.
Other	downtown growth
	Accessibility (commute, parking, etc.), access to talent, low taxes
	Accessible Class
	Adapt Aggressively
	adapting and meeting the needs of folks who want to live near where they work
	Allows businesses to do business
	amenities available
	attention to entrepreneurship
	attention to startups and desire to create support system for business owners
	attracting strong companies
	attractive place to live/work
	average
	bel-red project
	Bellevue is open for Business & embrace culture
	Bellevue residential area builds up quickly allowing more opportunities for doing business.
	Better people
	better web search
	Business and education growth; but needs a balance of the arts.
	Business consideration
	Business focus
	business friendly
	Business friendly
	BUSINESS GROWING
	business opportunities
	Business residential growth
	businesses in surrounding areas

cautious planning
Centrally Located
changes
choices
citizen input
city
City staff is great to work with and love the development in the city.
clean and safe
collaborative environment
community engagement
community
Competent governance
computer changes
conducting this survey for business input is important
CONGESTION
consistent balanced growth
Consumer Oriented
continued support
convenience
Corporate Development
creating a beautiful city to work in
Crumbling infrastructure
cultural explosion
dedication to do better
destination, growth
development and parking for commercial
Development Plans
Developmental planning
diversifying
diversity, long range plan
doing ok

Don't know
Downtown density
easy
Easy to work with
economic growth
economy
Economy is good
Efficient use of tax payer's dollars.
efficient, grow
Embracing growth
Encouraging growth and managing well
Engagement
Enormous growth
expanding
Expanding Clean
Expansion and open
expansion, growth
Expensive
fees, taxes
Forward planning
FORWARD THINKIING
forward thinking
Fresh
future focused
future oriented
Future planning
future vision
Getting nicer
Good business climate except for transportation infrastructure
good business environment
Good city planning

good economy
Good enough
good environment and good services
good for small businesses
good infrastructure investment, reasonable regulation
good planning
Good Planning
good roads, construction
Good schools and infrastructure
Good service
Good Service
growing
GROWING
Growing city
Growing City
growing community; needs for transportation; needs to expand and still meet the needs of current residents
growing economy
Growing economy
Growing quickly
growth
Growth
GROWTH
growth & parks
growth = congestion
growth issues being addressed
Growth Jobs
growth of downtown
growth opportunity
growth responses
Growth, services offered
helpful

Helpful and patient
high traffic
higher income
honest
Hub for technology startups
I don't deal with the City of Bellevue that often
idk
improved mass transit
Improvements in transportation infrastructure that are underway.
increased density
increasing density in city core
Independent Opportunities
innovation
Integration with the International business
Interstate 405 tolls
Infrastructure
investing infrastructure
it is a prosperous and productive atmosphere
job opportunity , more like metropolitan city
JOBS
keep small town
Keeping up with change
Keeping up with times
lack of contact with city of Bellevue
Latin people
light rail
Light rail
listen and care
livability
Location
long term planning for growth

Look at all those new buildings
Lots of money
Managed growth
managing growth
mass transit
mixed feelings re congestion
moderate expectations
money
Money.
More businesses opening
more knowledge people
more people moving and more businesses open in Bellevue
multicultural and environmental
n/a
Networking
Never had any issues,
new growth/development
No opinion
no red tape
No strong feeling
non interference
not anti-business
Not bad
not sure
Not sure
not too much regulation and good services
Nothing
ok
On the cutting edge of development and improvements
Open minded
Open minded and friendly

OPPORTUNITY
organization
Parking avidity for customers
Planned growth
planning
Planning
planning and listening
Planning for growth.
Popular city
Population
population growth
Positive
positive change, infrastructure
pricing
Pro Active
progressive
Progressive
progressive city
Property values
property value
Public transit
public transportation
public services
quality of life
Random Changes
Relationship with Asia
relevance and growth
renovation
Rules
safe
Safe and clean

safety & growth
services provided
Slightly archaic
small businesses are important
smooth process
Steady strategic development ion downtown area
Street improvements
Strong economy
Strong Economy
Supporting parks and green spaces
sustainable cheaper
Taxation is reasonable
Tech People
The downtown area has always been a city without the feeling of a city. People drive to the mall and other buildings, but do not stroll the sidewalks. It seems this trend continues. On top of that, traffic is getting far worse. Makes downtown an undesirable destination.
They keep expanding and growing
They plan ahead.
TI process too long
tire
Too expensive
traffic concerns
Traffic management
Transportation/serving different and varied communities
Uncontrolled growth
understands small business
Unsure how to articulate
upscale
urban development
variety of Business
visionary

	vs Seattle
	Walkability
	Well developed
	Well managed
	Well planned expansion
	Will planned and organized
	working on traffic

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

Reasons Bellevue is Headed in the <u>Wrong</u> Direction												
	Overall (n=239)		Business Services (n=57)		Information Technology (n=16)		Retail (n=34)		Tourism (n=18)		Other (n=114)	
Unmanaged growth or development/overcrowding	39	17%	8	15%	2	13%	9	28%	3	17%	17	17%
Traffic	37	17%	13	24%	0	0%	4	13%	0	0%	20	19%
Taxes	24	11%	7	13%	3	19%	2	6%	0	0%	12	12%
Cost/Expensive	21	9%	2	4%	4	25%	3	9%	2	11%	10	10%
Regulations/Red Tape/Beaurocracy	19	9%	5	9%	0	0%	2	6%	4	22%	8	8%
Unaware of services provided by City	16	7%	5	9%	1	6%	2	6%	1	6%	7	7%
Unfriendly to small/local business	12	5%	3	6%	1	6%	3	9%	2	11%	3	3%
Not helpful	8	4%	2	4%	1	6%	0	0%	1	6%	4	4%
Light Rail	6	3%	1	2%	0	0%	1	3%	1	6%	3	3%
Traditional/Old	6	3%	3	6%	0	0%	1	3%	0	0%	2	2%
Public Transit/Transportation	3	1%	1	2%	0	0%	0	0%	0	0%	2	2%
Infrastructure	2	1%	0	0%	1	6%	1	3%	0	0%	0	0%
Future/forward thinking/Proactive Leadership/Progressive	2	1%	1	2%	0	0%	0	0%	0	0%	1	1%
Growth/development	1	0%	1	2%	0	0%	0	0%	0	0%	0	0%
Business Friendly/Economy	1	0%	0	0%	0	0%	0	0%	0	0%	1	1%
Location/Convenient	1	0%	0	0%	0	0%	0	0%	0	0%	1	1%
Well managed/Well Planned	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%
Variety/Diversity	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%
Safe	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%
Helpful/Supportive/Responsive/Friendly/Positive	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	41	18%	5	9%	3	19%	6	19%	4	22%	23	22%

Not Headed in the Right Direction

Business Services

average
Awful traffic
Capitalism is overtaking ethics
congestion
CONSTRUCTION HASSLES
cumbersome bureaucracy
Density Studies and Traffic
development
development too rapid - too many new apartment complexes - too much congestion
Don't know
DON'T KNOW
Don't overdevelop
downtown traffic
excessive traffic
great culture
haven't researched
I am clueless regarding what the city does or doesn't do to encourage business.
I don't have enough info
I get nothing from the city
increasing congestion
Increasing Costs and Rents
Lack of communication
Light rail.
little interaction
Mass Transit
minimal contact with City
Need more incentives for Small Businesses
neutral
Neutral
neutral opinion

no basis for knowing

no comment

No comment

NO EXPERIENCE

no opinion

No real interactions.

no reason

No regard for small business

Not doing anything for me

not much to compare it to

Not supportive

Not sure what we Bellevue is doing to help

not sure what's available

nothing provided other than getting taxed

only pay taxes

Rapid growth = higher prices

Starter Programs

stodgy

Taxes

taxes & fees

taxes and regulations

taxes are too high

taxes, regulations

they are progressing

Too big.

Too corporate

too much development

Too much development esp. outside downtown

too much Bureaucracy

traditional

Traffic

	traffic and regulations are both getting worse
	traffic congestion
	Traffic Control
	Traffic is a Nightmare
	Traffic is bad
	Traffic of people
	Transit mess & traffic
	Unaware
	uninterested in small businesses
	Unknown
	Unplanned growth
	Very expensive.
	Very little interaction-no opinion, but that is not an option
Information Technology	Cost of break-even high
	ease of access to official processes
	Eradicating Manufacturing
	expensive
	Expensive to do business
	have no experience with other cities
	High taxes
	I am a consultant working through a C corp. None of this survey applies to me.
	I do not operate a business in Bellevue.
	I see it as neutral, I don't see it moving in any direction.
	Infrastructure for online Bellevue for growth and production is positive.
	Just my sense of things.
	lease management
	Minimal experience
	Nice but expensive
	No interaction
Not Applicable	

	NOT HELPFUL, COLD
	nothing specific worth calling out
	quarterly taxes
	taxation
	They're not concerned with small business.
	too much
	Too much.
	What city services?
Retail	1 man business rarely, if at all been contacted
	Construction
	depends on new council members
	Don't really listen to issues
	Downtown area expansion is negativity to effect the businesses.
	High taxation
	High Taxes
	I don't know
	I really get no benefits from Bellevue
	Independent small business is not supported strongly
	Infrastructure/ construction
	liberal mindset
	Light Rail
	Little interaction
	Need Fiber Internet
	neutral - makes no difference
	No significant interaction
	Over Building
	over-development /poor planning
	poor planning
	poor planning over-development
	Red Tape

	Red tape & doesn't support local business
	Transit situation in Bellevue and the traffic situation in Bellevue is just horrific.
	The rising costs are making impossible to stay in business.
	They are eliminating all the middle class jobs, eliminating all the blue collar workers.
	too much density
	too unfriendly
	Traffic congestion
	Traffic is not keeping up with traffic and parking.
	traffic, housing costs
	Uncontrolled development
	uncontrolled development in CBD
	Uncontrolled growth
	we don't see a whole lot of progress
	Why is water sewer so expensive?
	You only cater to big business
Tourism	Cater corporations
	Cause Bellevue's pretty average.
	congestion over development
	corporations leaving
	Development greater than infrastructure can handle
	Developers controlling the construction in the city.
	everything is too expensive
	Expensive, extremely
	hope
	It is hard to get building licenses and any permits. It is all about money.
	Light rail expenses
	lousy parking
	Neutral
	no help
	NOT ENOUGH BUSINESS WITH CITY TO EXPRESS

	Red tape
	small unfriendly
	sometimes too much beaucracy
	Too much red tape. Confusing management.
	What services do you provide?
Other	Although we would love to be more involved- at this time we have very little involvement with the city and we are not aware of the services or the direction it's taking.
	Ambivalent
	Average
	B&O Taxes
	Bad Management-Punitive Taxes
	Basic
	Bellevue is getting too crowded.
	Better transportation rules, guidelines
	big money big brand
	Bureaucracy, lack of responsiveness, excess taxation
	Business Atmosphere
	cant file taxes online
	City inspectors are rude, and cause more harm to small business then them help. Siting a business which has operated for 10-years for violations that are incorrect. Telling building owners they never submitted permits then being shown signed permits wastes time and shows total incompetence. Having a fire marshal show up to a meeting unprepared and then blaming business owner for his mistake is intolerable.
	Commuting & parking
	congestion
	Congestion
	Controlling
	Don't know much about other cities. Had a REALLY bad experience dealing with the city during our build out.
	downtown crowded
	eliminating light industrial
	expensive
	foreign money
government intrusion	
harsh	

Heavy traffic
high B&O taxes
High costs
high property taxes
High taxes, permit issues
high-rise growth
I am not even allowed to park a vehicle in my driveway for more than 24 hours. So ever weekend I am breaking the law.
I do not have enough information
I don't receive anything from the city so my answers are neutral
I don't have a lot of information on city scores, plans or direction
information office
irresponsible design
It's ok
Keep on raising taxes and fees
lack of experience
Lack of parking and increase building
Light rail
Loss of Bell-Red Industrial
meh
misguided city development/planning, cost of rent/business
Modern changes
needs care for small businesses
neglected
neutral
new business in area
new transit
No comment
no data
no help
No Help
No information

no opinion
No Problems
no reason
No sense of community
no wanting to complete survey
none
Nor Good or Bad
not business focused
Not Diverse
not enough info to answer
Not familiar with other cities
Not sure
Not sure what the city does for me
not too informed
office space costs, availability
One or two?
onerous B&O tax
Over building downtown
Over development. Lack of infrastructure
over growth
over regulation
Overbuilding/traffic congestion/parking
Overdevelopment, Commercialization
parking
parking, traffic flow
People are more uptight
Physical location only
political correctness
pot
public transportation
red tape drags work

rental prices
Renting office space is becoming too expensive
Road construction /traffic obstruction
sandwich boards
Service experience
similar
sings regulations are poor
slow
slow response
staff availability
Structure
taxes
Taxes and not being supportive.
taxes are high
Too much building at once, creates traffic and difficulty for business and safety hazards. Cannot get anywhere without being on a road with construction.
Too much growth to fast
too crowded too much traffic
Too expensive
Too much bureaucracy
Too much development with insufficient infrastructure to handle the traffic
too much growth too fast
too much light rail, not enough streets s highways
top heavy
traffic
Traffic and congestion is my main concern
traffic and light rail
traffic congestion
Traffic flow
traffic growth
Traffic is a very bad and getting worse
traffic overcrowding

	unaffordable development
	Unsure
	very small business
	Wealth people
	zoning

APPENDIX V—QUESTIONNAIRE

City of Bellevue, 2015 Business Survey
 NWRG Project Number: BEL_1550190_2015_Business

DATE LAST MODIFIED:

10/07/2015

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										Much Better Than Other Communities
	0	1	2	3	4	5	6	7	8	9	10
Easy to get around by car	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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

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

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

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 [DISPLAY FOR WEB RESPONDENTS ONLY] 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?

[DISPLAY FOR PHONE RESPONDENTS ONLY] 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 [DISPLAY FOR WEB RESPONDENTS ONLY] How would you rate the overall **quality of services** provided to businesses by the City of Bellevue?

[DISPLAY FOR PHONE RESPONDENTS ONLY] 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 [DISPLAY FOR WEB RESPONDENTS ONLY] Overall, would you say that **Bellevue** is headed in the right or wrong direction?

[DISPLAY FOR PHONE RESPONDENTS ONLY] 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	

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

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]

BNWRG5 [DISPLAY FOR WEB RESPONDENTS ONLY] Thinking about services and facilities in Bellevue, do you feel you are getting your money’s worth for your tax dollar or not?

[DISPLAY FOR PHONE RESPONDENTS ONLY] Thinking about services and facilities in Bellevue, do you feel you are getting your money’s worth for your tax dollar or not? Please use a scale from 0 to 10 where “0” means “definitely not getting your money’s worth” and “10” means “definitely getting your money’s worth.”
(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.

Definitely Not Getting My Money’s Worth											Definitely Getting My Money’s Worth
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 **[DISPLAY FOR WEB RESPONDENTS ONLY]** 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?

[DISPLAY FOR PHONE RESPONDENTS ONLY] 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_10	Overall feeling of safety
CC1_11	Quality of Police and Emergency Medical Services
CC1_12	Range of affordable housing options for employees

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

CC2 **[DISPLAY FOR WEB RESPONDENTS ONLY]** How satisfied are you with the customer service you receive when dealing with your Bellevue business Taxes?

[DISPLAY FOR PHONE RESPONDENTS ONLY] 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

CC3 If it were available, how likely would you be to file your Bellevue business taxes electronically? Use a scale from 0 to 10 where “0” means “Not at All likely” and “10” means “Extremely Likely”.

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

BC1 **[DISPLAY FOR WEB RESPONDENTS ONLY]** Overall, how would you rate the current state of Bellevue’s economy compared to other cities and towns in the Puget Sound region?

[DISPLAY FOR PHONE RESPONDENTS ONLY] 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 **[DISPLAY FOR WEB RESPONDENTS ONLY]** Overall, how would you rate the economic strength of your business?

[DISPLAY FOR PHONE RESPONDENTS ONLY] 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 Increase	Some Increase	No Change	Some Decrease	Significant Decrease
BC4_1	Number of Employees based in Bellevue	5	4	3	2	1
BC4_2	Capital Expenditures	5	4	3	2	1

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

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

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 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 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 YES
- 02 NO BUT CONSIDERING IT
- 03 NO, NOT CONSIDERING IT
- 998 **(DO NOT READ)** DON'T KNOW
- 999 **(DO NOT READ)** PREFER NOT TO ANSWER

ST2 Geographically, where are your biggest competitors 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

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

ST4 In the future, where do you expect the majority of your suppliers will be 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

ST5 Which of the following factors will have the 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

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

ST8 Have you used an advisor to help you with small business development within the last three years?

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

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

ADV1 **[DISPLAY FOR WEB RESPONDENTS ONLY]** How likely are you to recommend starting a business in Bellevue?

[DISPLAY FOR PHONE RESPONDENTS ONLY] 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 **[DISPLAY FOR WEB RESPONDENTS ONLY]** Please indicate which industry (business sector), your business is in?

[DISPLAY FOR PHONE RESPONDENTS ONLY] 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 **[DISPLAY FOR WEB RESPONDENTS ONLY]** Please indicate the number of employees your business has in each of the following categories?

[DISPLAY FOR PHONE RESPONDENTS ONLY] 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

DEMO6 In which area of Bellevue is your business located?

(READ LIST)

- 01 Bel/Red Corridor
- 02 Crossroads
- 03 Downtown
- 04 Eastgate
- 05 Factoria
- 06 Wilburton

- 07 Other (**SPECIFY**)
- 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.*